

MOBILE CONNECT

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Will 2011 be the
YEAR
of the
TABLET?



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Welcome to the inaugural edition of **Mobile Connect**, powered by **UIEvolution**.

I'm Frank Jewett, Director of Strategic Solutions for UIEvolution and executive editor of Mobile Connect. My job is to help UIE and our clients analyze news and trends so that we can aim ahead of the curve to build and maintain competitive advantages in the rapidly evolving mobile and connected space. Mobile Connect is an extension of that mission, a mechanism for UIE to share our analysis with clients and associates.

The focus of our May issue is tablets. Tablet computing has been around for more than ten years, but it wasn't until the debut of the iPad, just a little more than a year ago, that the tablet form factor achieved mainstream adoption. The iPad was so successful that it defined a new class of connected mobile devices, inspiring more than a hundred similar products that were unveiled at CES in January 2011.

Our feature article asks whether 2011 will be the "year of the tablets," looking back at developments during the first four months and analyzing the current state of the tablet sector as well as considering how tablet form factors are likely to evolve. We also provide an overview of Apple's Human Interface Guidelines for iPad, using the most successful tablet user interface paradigm to introduce tablet UI considerations. We introduce Dafloid, a new tablet app from UIE Japan that demonstrates how larger tablet displays can be used to aggregate and present a variety of information.

This issue also includes several regular features that discuss trends in devices and in the marketplace. One of these feature articles is a monthly update on major smartphone and tablet models in market and coming soon. This will provide an overview of significant devices in these rapidly evolving markets. Another monthly feature analyzes data and trends within the mobile and connected space. This month we look at data from the past fifteen months of movement in smartphone OS market share to analyze the underlying trends.

This magazine is meant to be the starting point for an ongoing dialog between UIE team members and our readers.

We welcome your feedback, suggestions, and questions. Please email your comments to me at frank@uievolution.com.

Thanks!



Will 2011 be “The Year of the Tablet?”

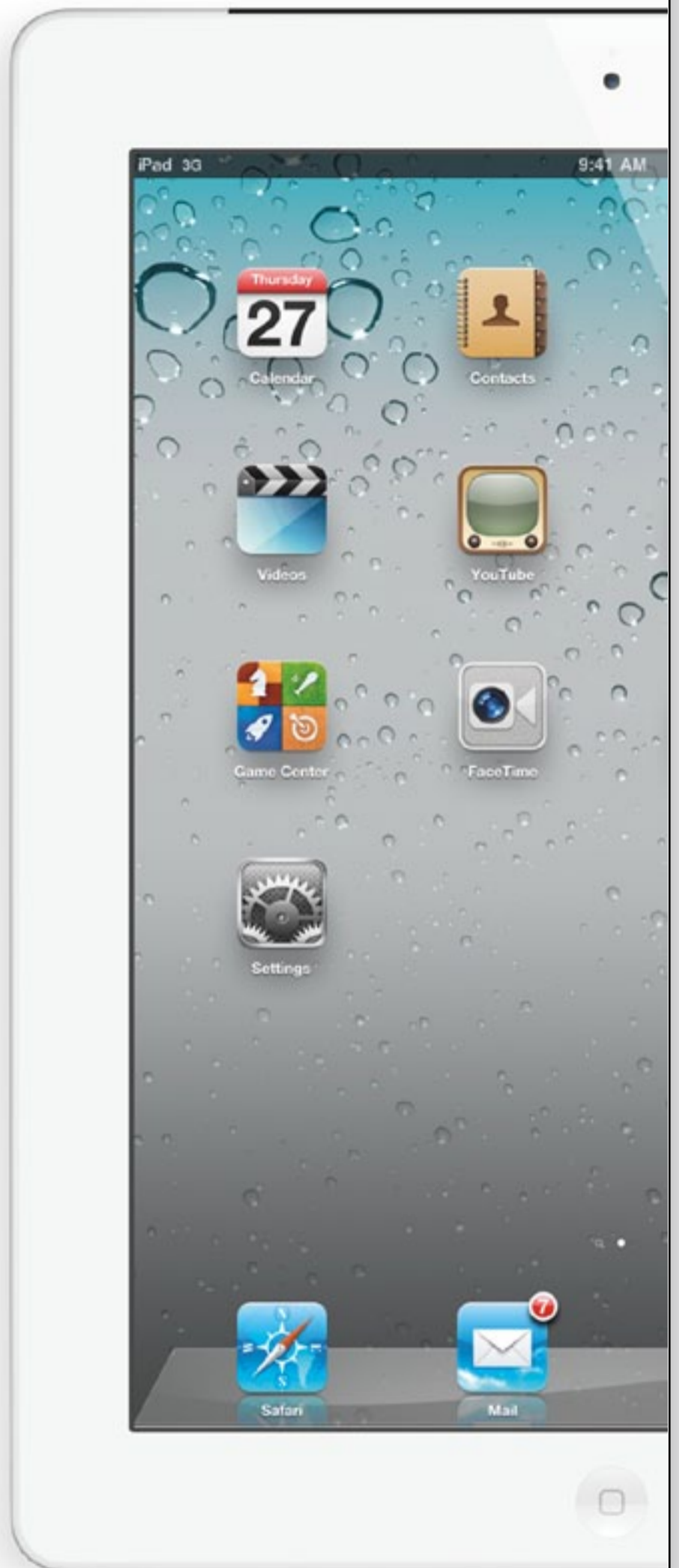
2011 was expected to be “The Year of the Tablet.” CES seemed to confirm that belief in January, as over 100 new tablets were unveiled as challengers to Apple’s iPad.

Motorola’s powerful Xoom led the way among Android tablets, boasting a 10.1” display powered by a dual core 1 GHz processor running Honeycomb, the first version of Android designed specifically for tablets. RIM’s BlackBerry PlayBook was also a favorite, packing 4G power and HTML5 support into a 7” format.

Behind the leaders ran a pack of largely interchangeable screens of various sizes running versions of the Android OS that were not designed for use on tablets, but Xoom and PlayBook were expected to challenge Apple’s dominance of the tablet market and to expand that market by attracting Android and BlackBerry owners who didn’t want to fragment their personal technology portfolio by purchasing iPads. HP announced the TouchPad in early February, adding a webOS alternative.

Apple reshaped the tablet landscape again on March 2nd when Steve Jobs unveiled the iPad 2. It boasted a 1GHz dual-core processor,

The iPad 2 was labeled “evolutionary” rather than “revolutionary” by analysts, but it neutralized many of the advantages competitors had been counting on to lure tablet buyers away from Apple.



in a case 33% thinner, with front and rear facing cameras, for the same price as the original iPad, which was several hundred dollars below the originally announced price for the Motorola Xoom. The iPad 2 was labeled “evolutionary” rather than “revolutionary” by analysts, but it neutralized many of the advantages competitors had been counting on to lure tablet buyers away from Apple.

The iPad 2 hit store shelves on March 11th, before either Xoom or PlayBook had a WiFi option in market. iPad stock didn't last long, with Apple selling an estimated 400,000 to 600,000 units in just three days through Apple stores and various retail outlets. Surveys suggested that more than half of those buyers hadn't purchased an original iPad, so Apple expanded the iPad market well beyond their loyal fan base.

Perhaps it was a sign of capitulation that very few new tablets were announced at CTIA in Orlando

two weeks later. The only notable tablet push was made by Samsung, who unveiled new 8.9” and 10.1” models of their Galaxy tab behind a “What's your Tab life?” promotion aimed at portraying Samsung as the only OEM not taking a “one size fits all” approach to the tablet market.

Unfortunately the only WiFi Galaxy Tab that would be headed toward store shelves in the near future was the 7” model, which had been selling poorly as a 3G device requiring a two-year contract with a wireless carrier. The 10.1” Tab wouldn't be available until June, and no date was announced for the 8.9” Tab, which felt bulky enough to make one wonder whether there really was another tablet sweet spot between the pad sized 10.1” and the legal junior sized 7” form factors.

Other would be iPad 2 challengers have fared no better. Motorola finally released a WiFi Xoom in late March, but it shipped with a non-functional microSD slot, no support for Flash, and only a few dozen Honeycomb

optimized apps in the Android Market. The Xoom also had a retail price \$100 higher than the iPad 2. RIM delayed the release of the first PlayBook by several weeks amid rumors that they were having difficulty securing components. When the PlayBook finally ships in late April, it will do so without integrated email and calendar apps, a surprising weakness for a tablet aimed at RIM's rapidly eroding base of business users.

Motorola's powerful Xoom led the way among Android tablets, boasting a 10.1” display powered by a dual core 1 GHz processor running Honeycomb, the first version of Android designed specifically for tablets.



The success of the iPad 2, coupled with the stumbles of would be competitors, has caused many analysts to revisit their predictions regarding the tablet market. Many now see Apple maintaining a dominant position in tablets for another 3-5 years, based on their early mover advantage and the billions in prepayments they have spent to lock up supplies of critical components like semiconductors and displays.

While some focus on the supply chain, others attribute Apple's dominance to their retail outlets or their loyal fan base, though data suggests

By the end of 2011, we expect the number of tablet users will have more than doubled and tablets will be well on their way to becoming a necessity rather than a luxury.

neither is a major factor as iPad 2 sold briskly through other retailers and many buyers didn't own other Apple devices. The supply chain and vastly superior marketing are Apple's big advantages. Apple announces new devices away from the din of competing announcements at industry trade shows, and they have units ready to ship to stores in short order.

Despite protestations from traditional PC players like Microsoft, who never delivered on promised tablets in 2010, and Dell, whose Streak was lampooned by reviewers, tablet sales overall are still increasing at the expense of laptops. The availability of more WiFi models this summer and the inevitable discounts to move current models to make way for new ones (even the original iPad was discounted once the iPad 2 was announced) will push more tablets into the hands of users, driving demand for more tablet apps from developers.

In particular, the 7" form factor, used by both Samsung's Galaxy Tab and RIM's BlackBerry PlayBook, offers a real alternative to the larger format of the iPad, which can't be carried in

a pocket or purse. Additionally RIM is planning to extend the PlayBook's QNX operating system to support Android apps, increasing the number of apps available for that device as well as the overall market for Android apps. HP is also planning to debut their first webOS tablet sometime this summer and there are rumors that Amazon might launch an Android tablet that would give them a chance to parlay their existing referral network into a dominant app sales channel.

Apple's tablet rivals got off to a disappointing start in the first quarter of 2011, but Apple's supernormal profits will continue to attract equipment makers, operating system providers, carriers, and even retailers, all looking to get their share of the public's growing appetite for tablets. Developers will leverage the rapidly growing power of these convenient computers to develop compelling mobile and connected apps that will further increase demand for tablets.

By the end of 2011, we expect the number of tablet users will have more than doubled and tablets will be well on their way to becoming a necessity rather than a luxury. If you don't have a tablet strategy, you'd better start working on one.

By Frank Jewett



Industry Timeline

Recent News

April 4 – Larry Page replaced Eric Schmidt as CEO of Google

April 6 – Microsoft and Toyota invested \$12 million in telematics to be built on the Microsoft Azure platform

April 9 - UIE published Help Japan, Earthquake/Tsunami relief effort and donation assistance app

April 11 – Microsoft launched Bing for iPad

April 12 – Cisco killed Flip, which it had purchased for \$590 million in 2009

April 18 – Apple sued Samsung for copying iPhone and iPad “look and feel”

April 19 – T-mobile launched Bobsled, a voice chat for Facebook

April 20 – Sony shut down PlayStation Network and Qriocity after system is hacked

April 21 – Amazon’s EC2 had 24-hour outage causing headaches throughout industry

April 21 – UIEJ published KouKouTV WiFi digital photo sharing app for iPhone and iPad

April 21 – Google Offers Beta, similar to Goupon, launched in select cities

April 22 – Google Voice released for Sprint subscribers, allows cloud based messaging and TTS

April 28 –Apple’s highly awaited iPhone 4 is finally released in white

Coming Soon

Mobile Northwest Technology Conference held in Seattle May 16th

Apple plans secret reveal for 10th Anniversary May 21-22

Apple WWDC in San Francisco June 6-11

Google Chromebook orders begin June 15th

Connections: The Digital Living Conference & Showcase in Santa Clara June 28-30th

CTIA Enterprise & Applications takes place in San Diego October 11-13th

VISA’s Digital Wallet Fall 2011

Data Point: US Smartphone OS Market Share

This month's Data Point features US smartphone OS market share data from January 2010 through March 2011, as reported by comScore, Inc. at www.comscore.com.

The most striking feature of this data is the meteoric rise of the Android OS, from about 7% market share in January 2010 to 35% market share in March 2011. The growth of Android's market share is even more amazing when you consider that the overall smartphone market is growing at about 80% annually, meaning that Android actually increased its customer base about tenfold during the past fifteen months.

The rapid growth of the smartphone market also needs to be taken into account when looking at the market share for iOS and RIM. Apple's iOS has consistently hovered around 25% market share, but that flat line is deceiving - they had to double their customer count to hold that share over the past fifteen months. Meanwhile, RIM may not be losing customers, but their slumping share numbers indicate that they clearly are not keeping pace with the growing market.

Another important feature of this data is the smoothness of the lines. The reason for this is that

the large number of smartphones in market, currently about 72 million, makes it difficult to move the share numbers dramatically, even with the introduction of a new device that sells quickly. Standard two-year contracts also discourage rapid movement between carriers and devices.

Android shows no signs of slowing its rapid growth, with 50% market share by the end of 2011 a realistic possibility. Apple's strategy has been to maximize profits

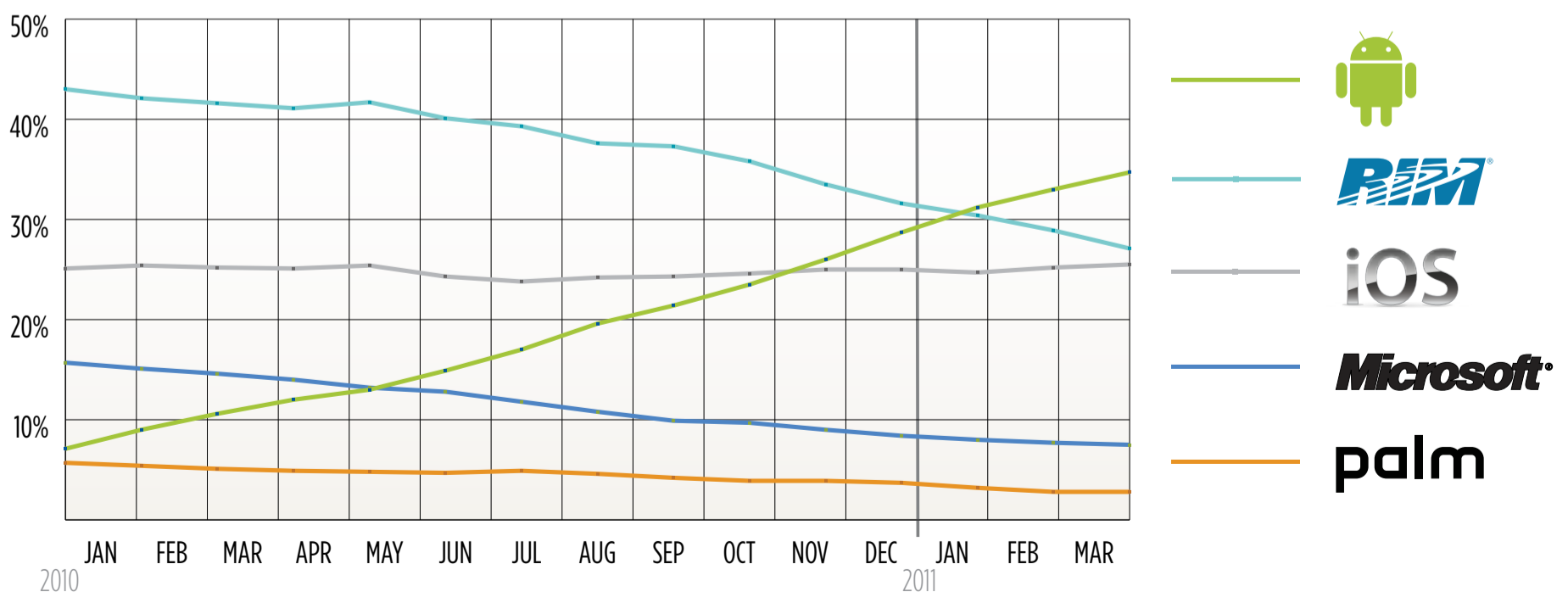
Apple's iOS has consistently hovered around 25% market share, but that flat line is deceiving...

rather than slashing prices to expand

market share, though rumored smaller, less expensive iPhones could help iOS compete with lower-priced Droids. RIM may not be losing many customers, but they are clearly becoming a niche product as new buyers favor larger touchscreen devices without QWERTY keyboards.

Given RIM's shrinking market share and the difficulties of redesigning for their five-way controls, their platform is at risk of being overlooked by companies planning their mobile strategies as well as being abandoned by developers looking to sell mobile apps. Windows Phone should not be considered a factor in the smartphone OS market until Microsoft releases actual sales figures.

2010-2011 Smartphone OS Share





BlackBerry PlayBook

BlackBerry's PlayBook was released for WiFi only. It's the first RIM tablet. It's powered by a dual-core 1 GHz TI processor. It has a 5 megapixel camera that can capture full 1080p HD video. It ships running RIM's QNX tablet OS, but RIM announced plans to provide an Android application player later this summer to support Android apps.



LG G-Slate

LG's G-Slate was released on T-Mobile. A WiFi version is also available. It's the first 3-D tablet and the first 8.9" tablet in market. It offers 4G connectivity powered by a dual-core 1 GHz Tegra2 processor. It has two 5 megapixel cameras that can capture full 1080p HD video in 3-D, though red and blue glasses are required for 3-D viewing. It ships running Android 3.0 "Honeycomb."

Major Models and Future Releases

OEM	Model	Size	Pixels	OS Version	Carrier / Retailer	WiFi Release	WiFi Price
Apple	iPad 2	9.7	1024 x 768	iOS 4.3	AT, VZ	3/11/11	\$499
Motorola	Xoom	10.1	1280 x 800	Android 3.0	VZ	3/28/11	\$599
Samsung	Galaxy Tab	10.1	1280 x 800	Android 3.0		6/8/11	\$499
Toshiba	Thrive	10.1	1280 x 800	Android 3.0			\$449
Samsung	Galaxy Tab	8.9	1280 x 800	Android 3.0			\$469
LG	G-Slate	8.9	1280 x 768	Android 3.0	TM	4/20/11	\$750
Samsung	Galaxy Tab	7	1024 x 600	Android 2.2	All	4/10/11	\$349
HTC	EVO View	7	1024 x 600	Android 2.3	SP	Q2	
HTC	Flyer	7	1024 x 600	Android 2.3	Best Buy	5/27/11	\$499
Dell	Streak	7	800 x 480	Android 2.2	TM	1/10/11	\$380
RIM	PlayBook	7	1024 x 600	QNX	AT, VZ	4/19/11	\$499
HP	TouchPad	9.7	1024 x 768	Web OS			

LG G2x

LG's G2x was released on T-Mobile in April. It offers 4G connectivity powered by a dual-core 1 GHz Tegra2 processor. It has an 8 megapixel camera that can capture full 1080p HD video. It also has a micro USB port and a mini-HDMI port. It ships running a standard version of Android 2.2 "Froyo."

**Droid Incredible 2**

HTC's DROID Incredible 2 was released on Verizon. It offers 3G connectivity powered by a 1 GHz Snapdragon processor. It has an 8 megapixel camera that can capture 720p video. It also has a micro USB port. It ships running the HTC Sense UI over Android 2.2 "Froyo."

**Major Models and Future Releases**

OEM	Model	Size	Pixels	OS Version	Carriers	Release	QWERTY Keyboard
Apple	iPhone4	3.5	480 x 800	iOS 4.3	AT&T, VZ	3/11/11	No
HTC	ThunderBolt	4.3	480 x 800	Android 2.2	VZ	3/17/11	Yes
HTC	EVO 4G	4.3	480 x 800	Android 2.2	SP	6/4/10	No
HTC	DROID Incredible	3.7	480 x 800	Android 2.2	VZ	4/29/10	No
HTC	Inspire 4G	4.3	480 x 800	Android 2.2	AT&T	2/13/11	No
HTC	EVO Shift 4G	3.6	480 x 800	Android 2.2	SP	1/9/11	Yes
HTC	myTouch 4G	3.8	480 x 800	Android 2.2	TM	11/3/10	No
LG	G2x	4	480 x 800	Android 2.2	TM	4/15/11	No
Motorola	Atrix 4G	4	540 x 960	Android 2.2	AT&T	3/6/11	No
Samsung	Epic 4G / Galaxy S Pro	4	480 x 800	Android 2.1 / 2.2	SP	8/31/10	Yes
Samsung	Nexus S	4	480 x 800	Android 2.3	TM	12/16/10	No
Sony Ericsson	Xperia Play	4	480 x 800	Android 2.3	VZ		No

Sports Meets Tab

DAFLOID

Imagica TV and Squad teamed with UIEvolution to release Dafloid, an exciting new sports application for tablets.

Dafloid, a combination of the Japanese words for “dashboard” and “flow”, is a rich multimedia portal that refines how sports, media, and information converge with video, audio, and social media to create a unique daily consumer experience for smartphones and tablets.

Dafloid is currently available for the Samsung Galaxy Tab, an Android tablet, but an iPad version is coming in May. Sports fans can download Dafloid at www.dafloid.com.

Dafloid is a free application that delivers daily news about baseball, soccer, and other favorite, plus user configurable news about any local teams the user selects, delivered in an attractive, dynamic package. Video, audio, and Twitter integration make Dafloid much more than a mobile magazine that has been ported to a tablet.

Imagica TV provides sports content for Dafloid with Squad, Inc providing some soccer content and UIE hosting data.

The goal for Dafloid is to attract 100 million free members to the service in 2012, with plans to eventually expand the offerings with more content including entertainment news and lifestyle articles, including food and fashion features.

Visit www.dafloid.com to see the latest information on this rich new multimedia sports and entertainment app.

by Jim Bogar



Overview: Apple's Human Interface Guidelines for iPad

Apple revolutionized tablet computing with the release of the iPad in April 2010. Tablet PCs had been around for a decade, but the iPad was the first tablet device to achieve significant market share, redefining or reinventing the tablet device class.

Debate continues over why the iPad has been so successful, but clearly part of the formula was simplifying the user interface so that neither the iPad, nor the software running on it, required an instruction manual.

Given the significant role UI plays in the success of the iPad, one might expect Apple's Human Interface Guide to provide a detailed set of rules governing good tablet UI, but the guidelines specific to tablets take up only a few of the hundred plus pages in the HIG. We've distilled those guidelines into this overview.

SIMPLICITY

Keep the user interface simple by focusing on features that are directly related to the main task, avoiding extraneous controls.



TRANSITIONS

Limit the use of transitions to objects and content that are changing rather than using full screen transitions. Use split views and popovers to reduce the need for transitions.

INFORMATION HIERARCHY

Use a split view to provide drill-down navigation to primary content. Use a segmented control to select sorting and a tab bar to select categories. Use popovers to enable actions and to provide tools. Avoid using the tab bar to swap out complete screens.

POPOVERS

Use popovers for tasks that require more than one type of input. Popovers can be used to drill down to content when not using split view.

Dim the background and require dismissal for modal popovers to differentiate them from non-modal popovers, where the background should not be dimmed. Use an arrow on the popover to indicate the control that triggered the popover.

TOOLBARS

Move toolbars to the top of the screen to increase vertical space.

SPLIT VIEW

The only iPad-specific view defined in the HIG is the split view. The split view divides the screen to present side-by-side views when the iPad is in landscape orientation. The left view is meant to present a list or collection of items, with the right view presenting a detailed view of the selected item. The split view is only supported on iPad apps.

The split view can be seen in the iPad email program when the tablet is in landscape orientation. When the tablet is in portrait orientation, the list functionality is automatically hidden by the split view controller. The list can be accessed in a popover by selecting

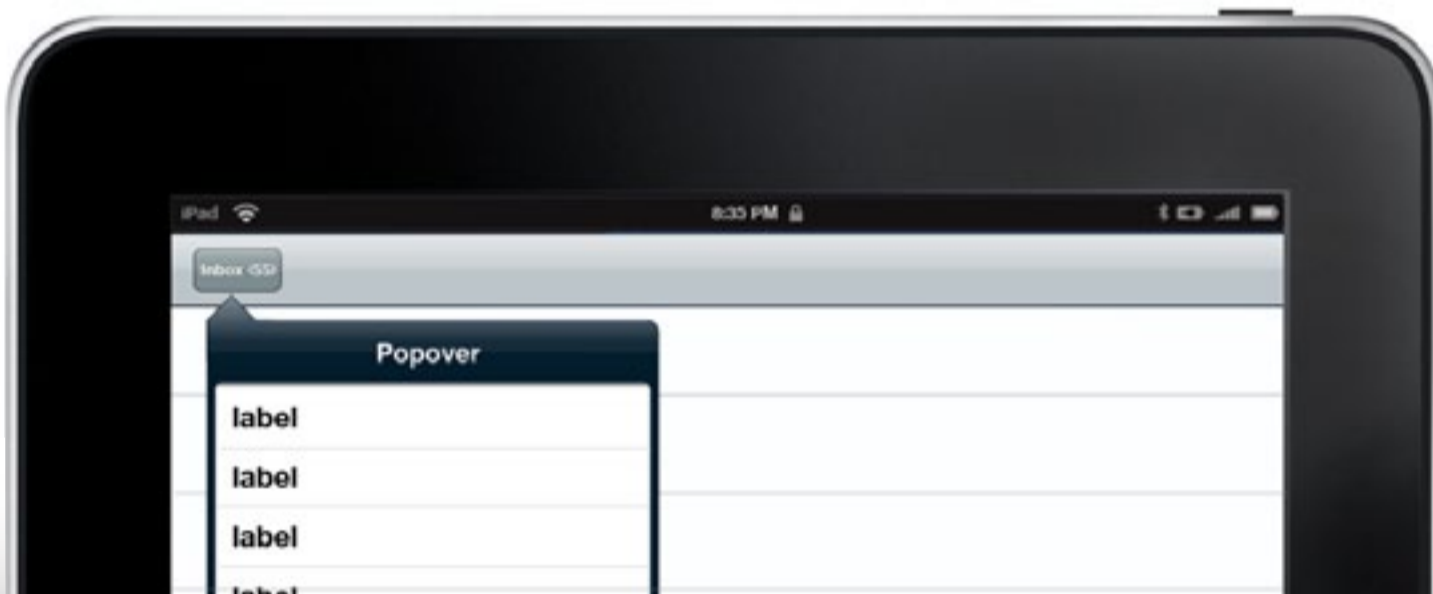
the mailbox control. It is worth noting that apps such as the iPad Settings app display the split view in both landscape and portrait orientation.

BEYOND APPLE HIG

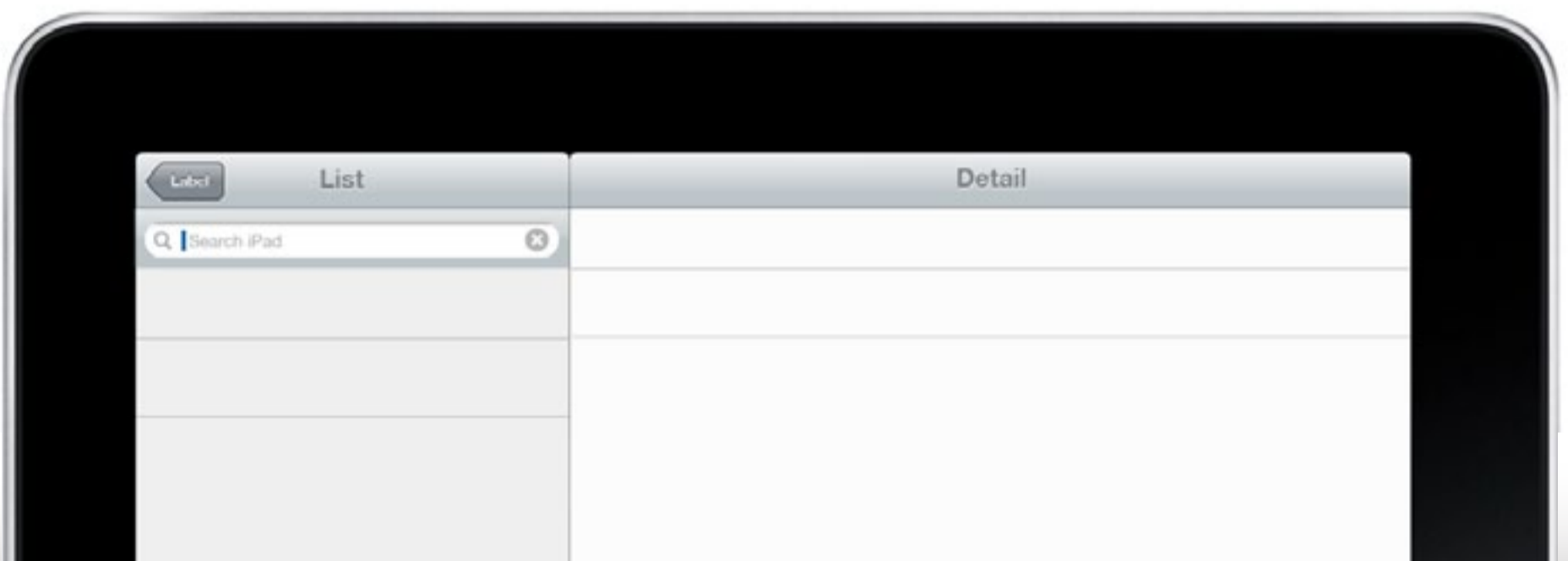
iPads and other tablets have graphics capabilities that rival dedicated video game consoles. With great power comes great responsibility. Designers can avoid the pitfalls of bad multimedia user interfaces while creating new tablet UI paradigms by remembering these five words: There is no user guide.

By Frank Jewett

▼ Popover



▼ List View



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