Post-show analysis

Mobile World Congress 2017: Key global trends in smartphones

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Timing trade-offs

With Qualcomm Snapdragon 835 chipset available later than expected, OEMs had three strategies left for their flagship smartphones:

• Use last year’s chipset and launch early (LG G6, Huawei P10, HTC U Ultra)

• Pre-announce Snapdragon 835 use, but ship in late spring (ZTE, Sony Xperia XZ Premium)

• Delay flagship to nearer availability (Samsung, Lenovo/Moto, Xiaomi, HMD/Nokia, Oppo, Vivo)
Just as interesting as what was unveiled at MWC 2017 was what was not launched.

• Key OEMs chose not to launch flagship smartphone models because of chipset availability

• Samsung, Apple and other OEMs will launch much improved flagships at a later date

• VR product launches were also largely on hold, because of shortages in low-persistence OLED display panels needed to support Google Daydream VR
Brand-power revival

In a maturing smartphone landscape, **brands** are even more important in marketing given little differentiation today in smartphone hardware.

**Examples at MWC:**

- **TCL** launches BlackBerry-brand handset
- Finnish start-up **HMD** launches first global Android smartphone models under **Nokia** brand and revives iconic Nokia 3310 feature phone
- **Huawei** renews partnership with Leica and now also works with GoPro
New design language

• LG, Sony and Samsung launched devices with **HDR** (high dynamic range), offering vivid color.

• LG G6’s wider **18:9** aspect ratio heralds a renewed move to increase screen size inside a similar volume with much smaller bezels.

• Most OEMs are moving **fingerprint sensors** to the rear to make space, except: Huawei, Apple and TCL’s BlackBerry.
Smarter smartphones – with embedded AI

**Machine learning** is becoming a standard feature of a “smart” smartphone.

**Examples at MWC:**

- Huawei P10 includes a new **photo gallery organization** co-developed with GoPro
- Motorola’s Moto Mod powered by Amazon’s **Alexa**
- Google Assistant launched for all **Android** v6 and v7 smartphones
- Alcatel **A5 LED** case demonstrating Amazon Alexa integration
Modular mobile experiences

The mobile experience used to be delivered only on smartphones, but OEMs last year launched modular hardware designs to extend the experience.

Now, a shift is occurring to extend the mobile experience across wireless-connected smart accessories like hearables, smartglasses, smartwatches and fitness trackers.

Examples at MWC:

- Sony Xperia Ear stereo prototype
- Motorola’s Moto mod with Alexa
- Alcatel LED case for A5 smartphone
- Vuzix glasses
- Google Assistant on Huawei Watch 2
Gigabit-LTE speed

Operators and vendors touted the latest gigabit-LTE speed increase in hardware:

- Samsung announced gigabit-LTE support for upcoming Exynos chipset
- Sony’s Xperia XZ Premium marketed support
- ZTE pre-announced support but provided little detail
Camera innovations

The camera continues to be a defining flagship model feature, but OEMs take different approaches:

- LG G6 continued G5 approach using dual camera with wide/normal lenses
- Sony Xperia XZ offered one camera but with short super-slow-motion mode enabled by stacked memory on the sensor
- Oppo showed 5x optical zoom working prototype with “folded optics” and almost no external camera bump
- Huawei P10 & P10 Plus continued with dual mono/RGB camera design but with added detail possible from mono sensor
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