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Post-show analysis

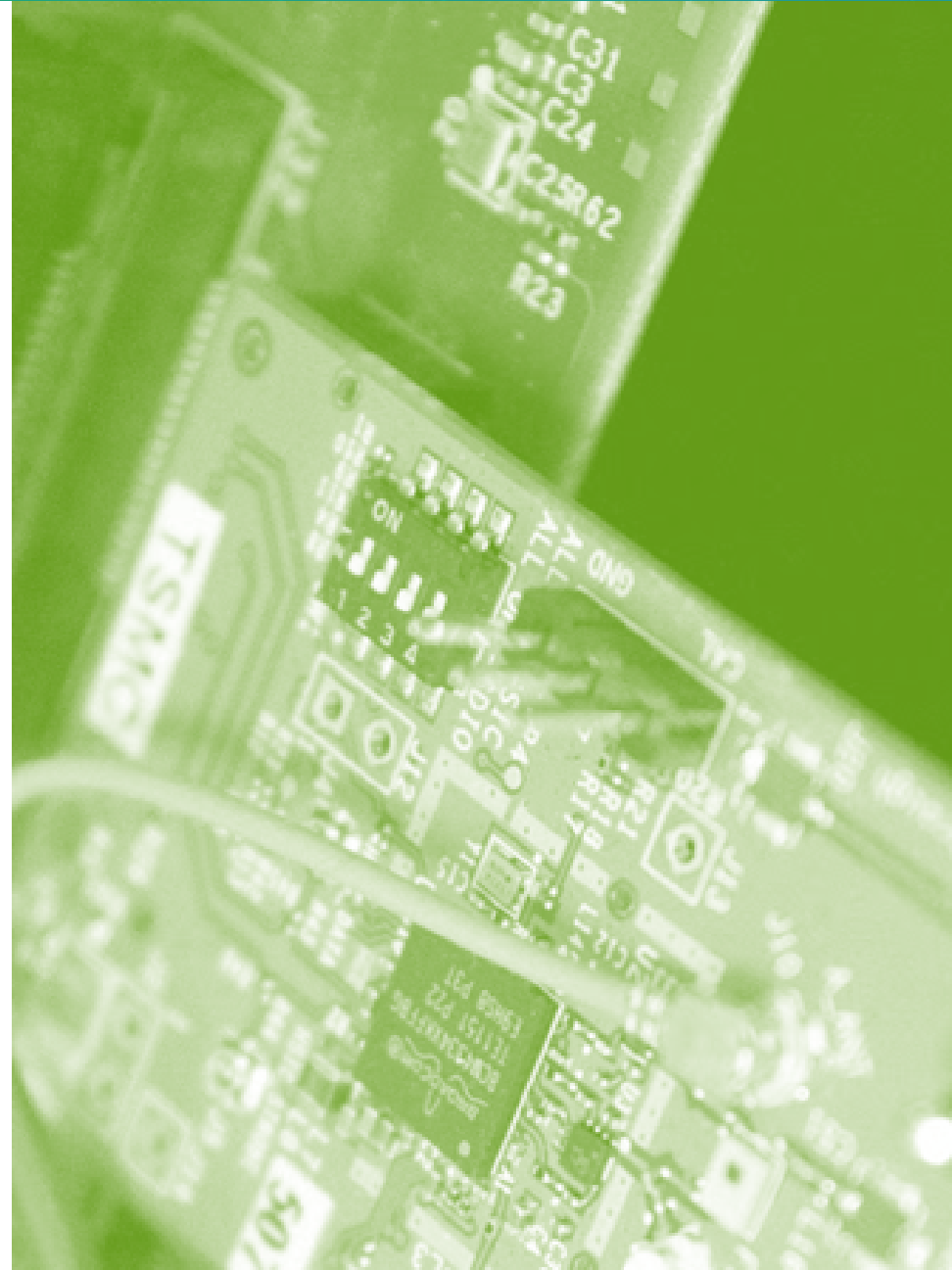
Mobile World Congress 2017: Key global trends in smartphones

Ian Fogg, Gerrit Schneemann, Jusy Hong,
Rhoda Alexander, Wayne Lam, Ying Yang, Zaker Li

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)



Missing in mobile

Just as interesting at 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:

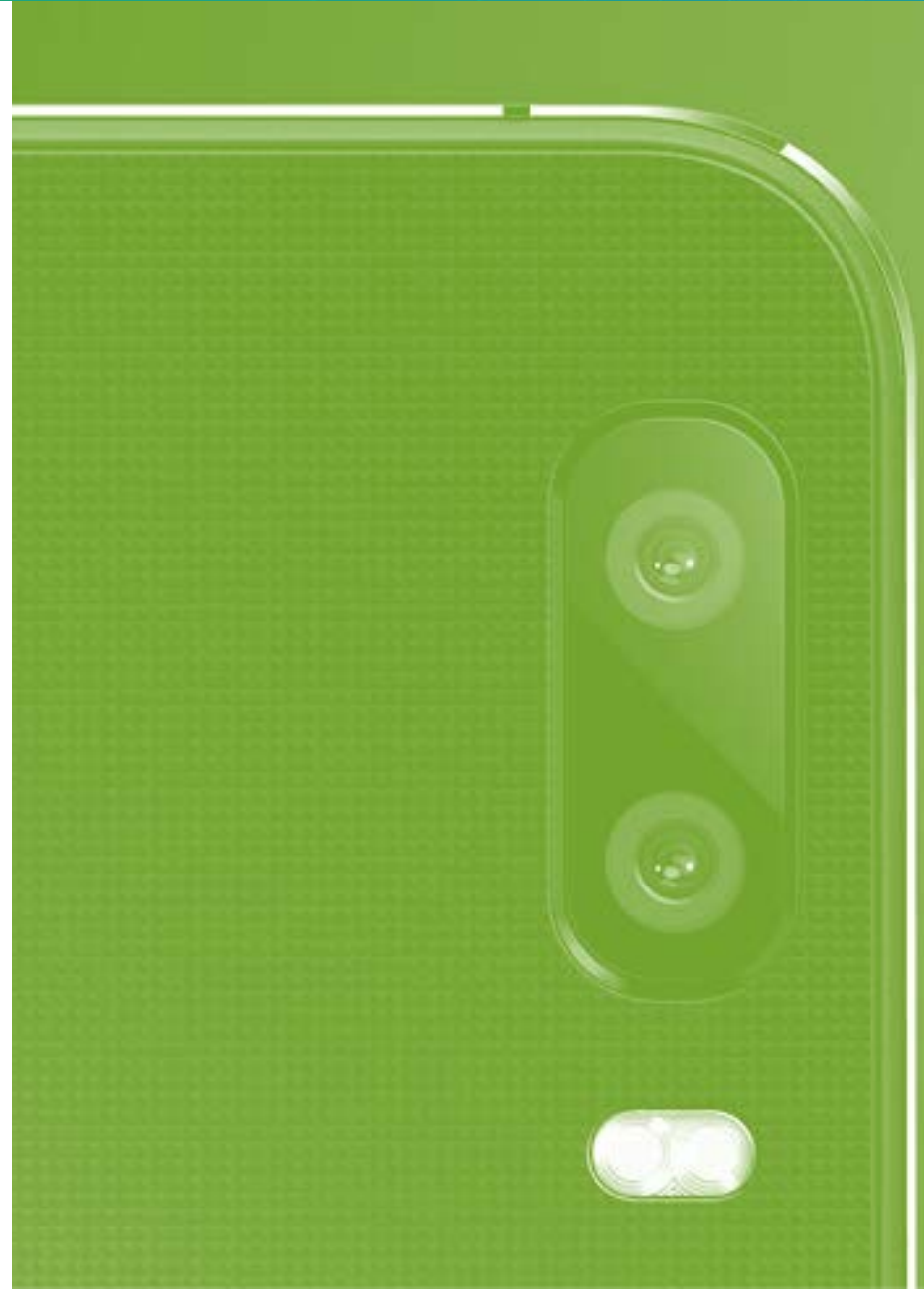
- Samsung announced gigabit-LTE support for upcoming **Exynos** chipset
- Sony's **Xperia XZ** Premium marketed support
- **ZTE** pre-announced support but provided little detail



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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This is the first of a series of post-MWC insights from IHS Markit. The next post-MWC insight will focus on **mobile ecosystems**.

IHS Markit Customer Care

CustomerCare@ihsmarkit.com

Americas: +1 800 IHS CARE (+1 800 447 2273)

Europe, Middle East, and Africa: +44 (0) 1344 328 300

Asia and the Pacific Rim: +604 291 3600

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