Global Market Trends of Mobile Devices
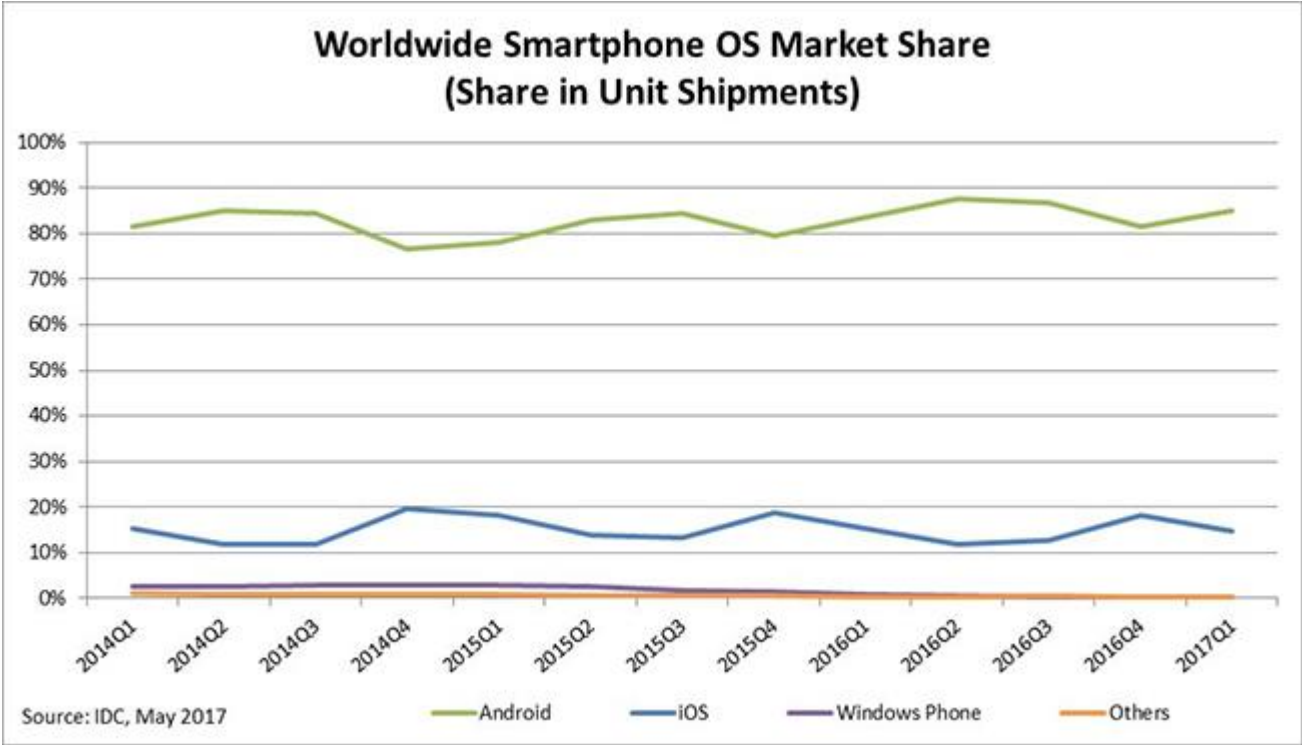
Mark Jolley - Zebra Technologies

Sales Engineering Manager, Strategic Sales EMEA

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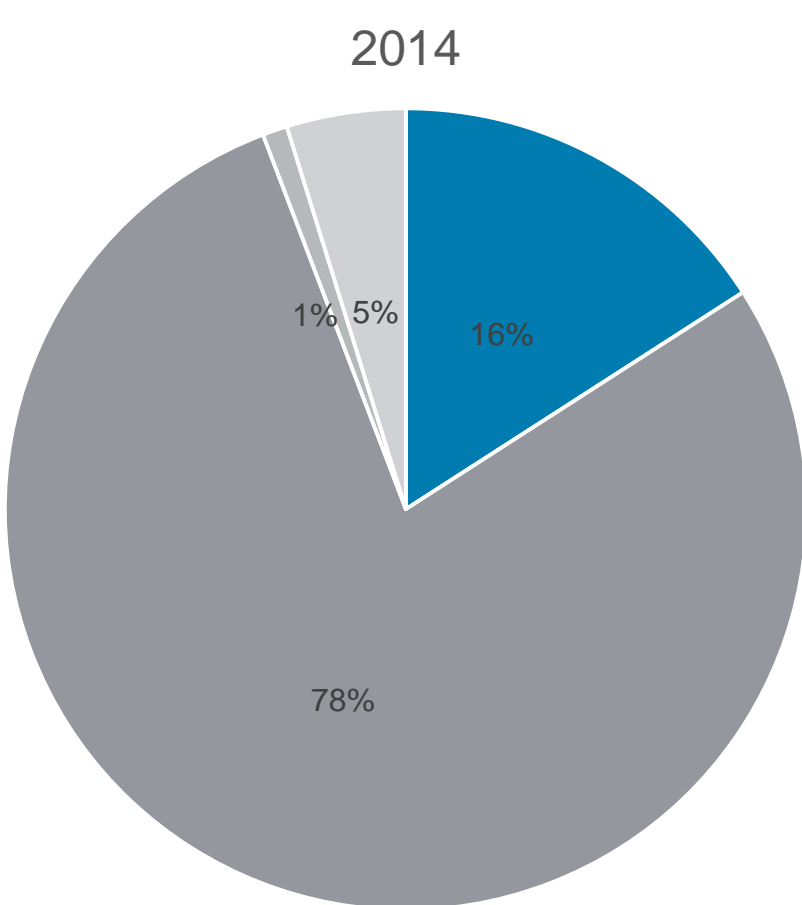# Global Handheld Market Share

Worldwide Smartphone OS Market Share (Share in Unit Shipments)

Source: IDC, May 2017

Period	Android	iOS	Windows Phone	Others
2016Q1	83.4%	15.4%	0.8%	0.4%
2016Q2	87.6%	11.7%	0.4%	0.3%
2016Q3	86.8%	12.5%	0.3%	0.4%
2016Q4	81.4%	18.2%	0.2%	0.2%
2017Q1	85.0%	14.7%	0.1%	0.1%

Source: IDC, May 2017

History Statistics of Operating Systems in the Enterprise
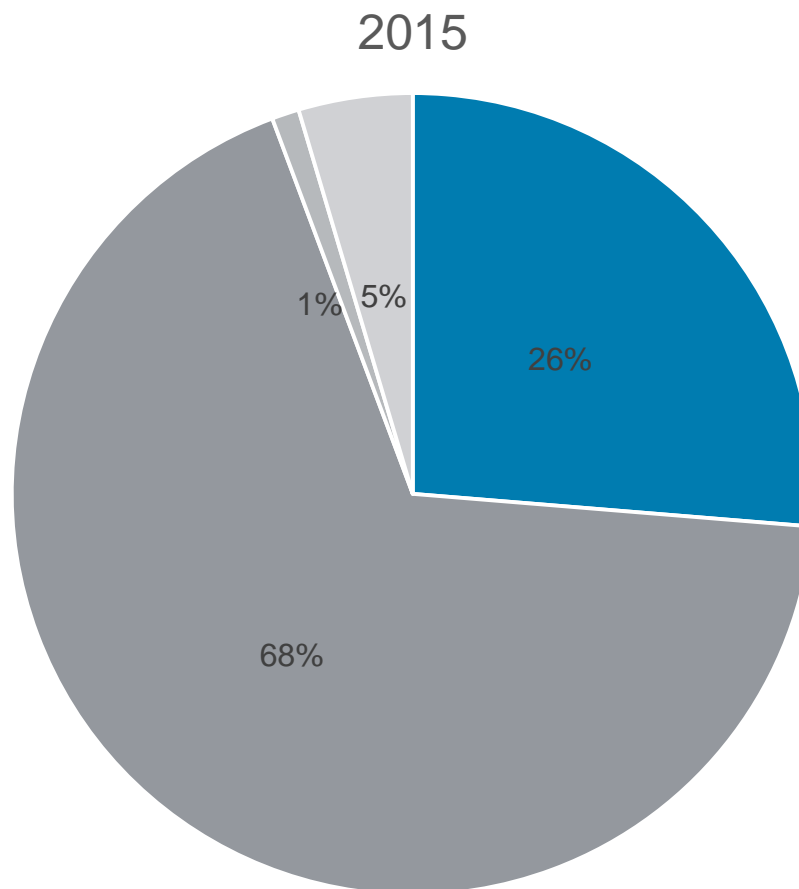
2014

16% Android
78% MSFT legacy (WM/CE)
1%
5%

- Android
- MSFT legacy (WM/CE)
- MSFT WE8.1H /10
- Other

2015

26% Android
68% MSFT legacy (WM/CE)
1%
5%

- Android
- MSFT legacy (WM/CE)
- MSFT WE8.1H /10
- Other

2016

28% Android
66% MSFT legacy (WM/CE)
1%
5%

- Android
- MSFT legacy (WM/CE)
- MSFT WE8.1H /10
- Other

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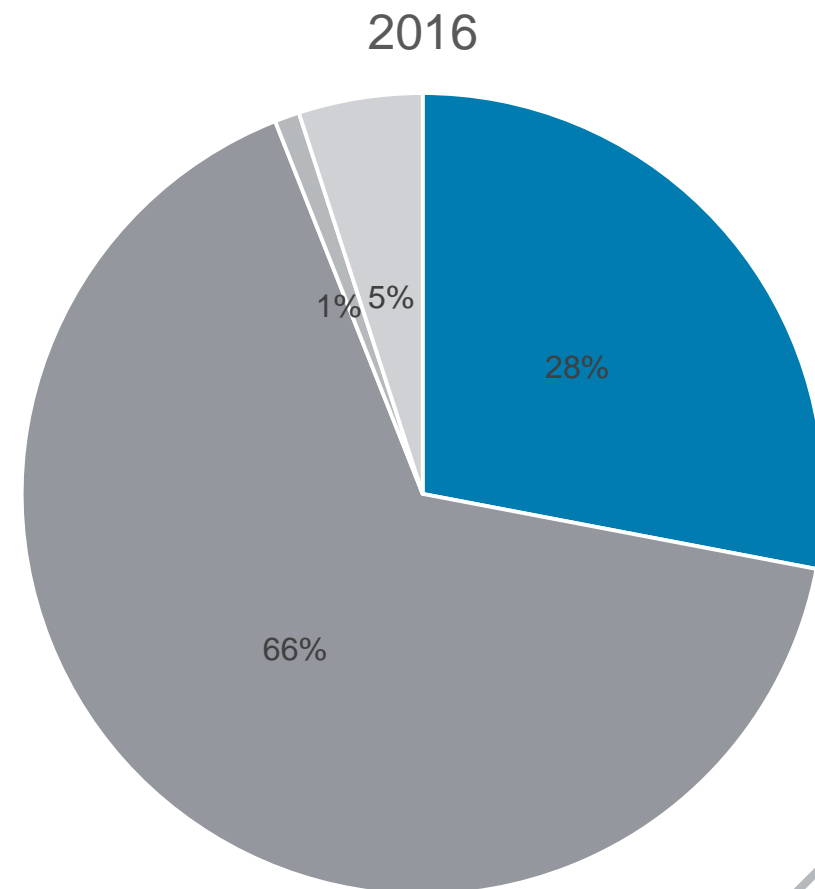
Current Operating System Position

Enterprise Market Share Operating Systems Q1 2017
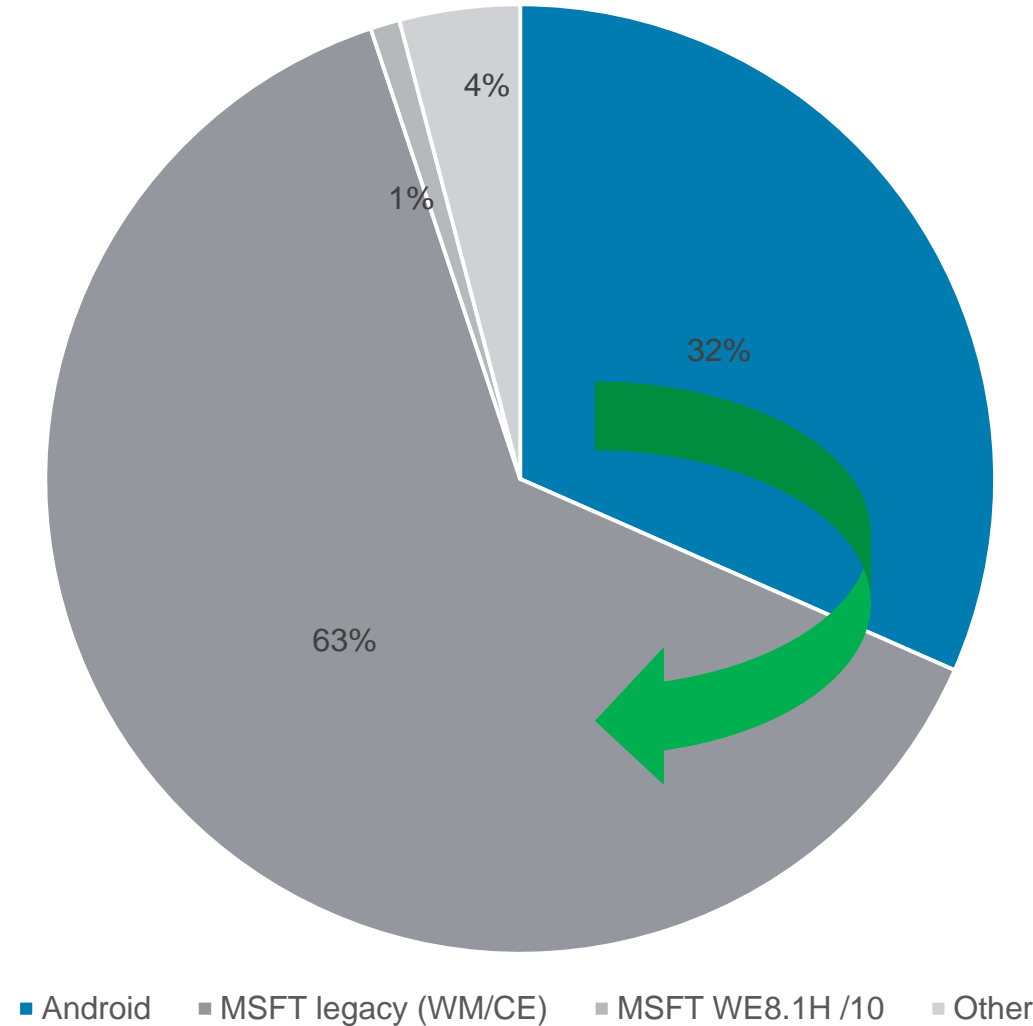
Windows Mobile/CE

What date was Windows 6.5 released?	September 2009

What date was Windows CE Released?	March 2011

Windows Mobile

Windows Mobile / Windows Embedded HH			
Products Released	General Availability Date	Mainstream Support Retired	Extended Support Retired
WEH 6.5	12/17/2010	1/13/2015	1/14/2020
WM 6.5 (std & pro)	9/11/2009	1/8/2013	None
WM 6.1	7/1/2008	1/8/2013	None
Windows Mobile 6.0	2/12/2007	1/8/2013	None
WM 5.0 for Smartphones	7/31/2005	10/12/2010	10/13/2015
WM 5.0 for Pocket PC	7/31/2005	10/12/2010	10/13/2015
WM 2003-SE software for Smartphone	5/31/2004	7/14/2009	7/8/2014
WM 2003-SE Pocket PC Phone Edition	6/24/2004	7/14/2009	7/8/2014
WM 2003 software for Smartphone	5/31/2004	7/14/2009	7/8/2014
WM 2003 software Pocket PC Standard Edition	5/31/2004	7/14/2009	7/8/2014

CE / WEC

Windows Embedded CE / Windows Embedded Compact			
Products Released	General Availability Date	Mainstream Support Retired	Extended Support Retired
WEC 7	3/15/2011	4/12/2016	4/13/2021
Windows Embedded CE 6.0 R3	9/30/2009	4/10/2012	
Windows Embedded CE 6.0	11/30/2006	4/10/2012	4/11/2017
Windows CE 5.0	8/31/2004	10/13/2009	10/14/2014
Windows CE .NET 4.2	6/1/2003	7/8/2008	7/9/2013
Windows CE .NET 4.1	10/29/2002	1/8/2008	1/8/2013
Windows CE .NET 4.0	4/1/2002	7/10/2007	7/10/2012
Windows CE 3.0	7/30/2000	9/30/2005	10/9/2007

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GLOBAL TRENDS
GROWTH TO COME FROM SEVERAL DRIVERS

MEGATRENDS

Internet of Things

Cloud

Mobility

TECHNOLOGY TRENDS

Laser to Imaging

OS Transition

USE CASE TRENDS

- E-commerce
- Omnichannel / Shopper Experiences
- Real-time, Workflow Management
- Workforce Mobility

- Location & Motion Tracking
- Dynamic Scheduling / Routing
- Asset Identification, Tracking & Utilization Optimization

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FAVORABLE INDUSTRY DYNAMICS ACROSS MOBILITY VERTICALS

HEALTHCARE

RETAIL

MANUF/T&L

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FAVORABLE INDUSTRY DYNAMICS ACROSS MOBILITY VERTICALS

HEALTHCARE

DIGITIZATION OF HEALTHCARE WORKFLOWS

TRACK AND TRACEABILITY (DEVICE, SPECIMEN, PHARMACEUTICAL)

STREAMLINED CLINICAL MOBILITY

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FAVORABLE INDUSTRY DYNAMICS ACROSS MOBILITY VERTICALS

RETAIL

SHOP ANYWHERE, ANYTIME

MOBILITY AS A PLATFORM FOR RETAIL OPERATIONS

ENHANCED CUSTOMER EXPERIENCE AND ENGAGEMENT

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FAVORABLE INDUSTRY DYNAMICS ACROSS MOBILITY VERTICALS
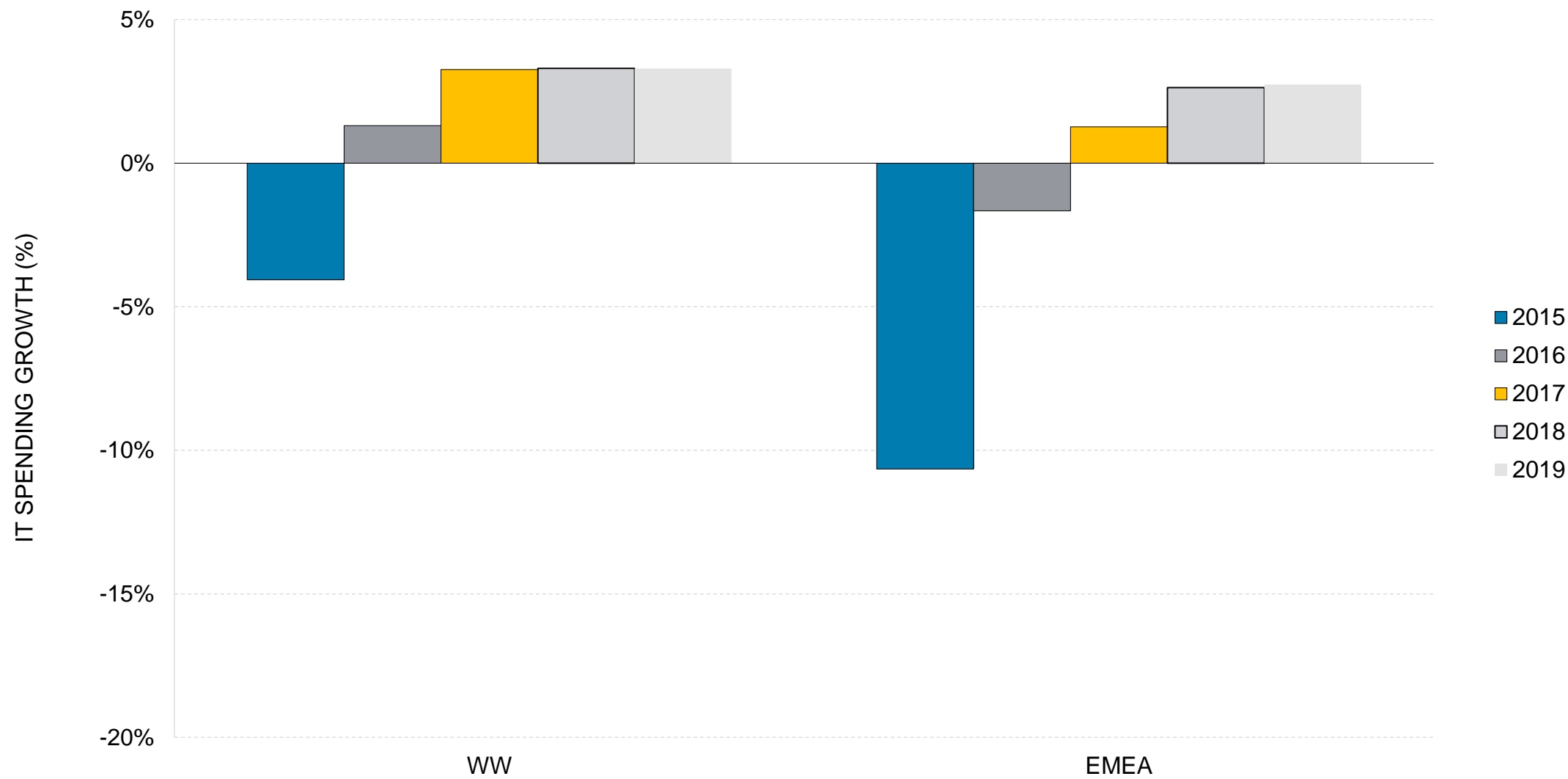
MANUF/T&L
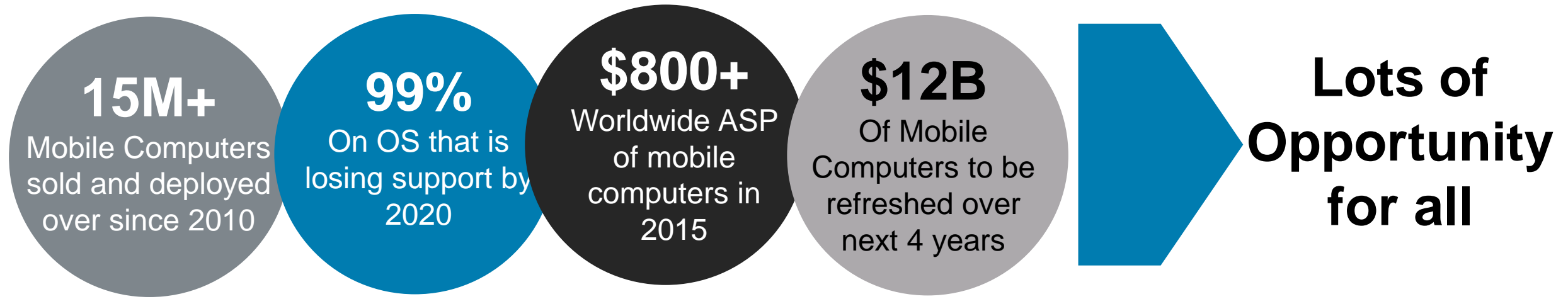
SUPPLY CHAIN VISIBILITY

ACTIONABLE OPERATIONAL INSIGHT

IMPROVED OPERATIONAL WORKFLOW

Source: Supply-side online retail research by eNET, 2001-2017

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ENTERPRISE IT SPEND GROWTH, 2015 – 2019

TODAY – SEIZING THE OS MIGRATION OPPORTUNITY

15M+
Mobile Computers sold and deployed over since 2010

99%
On OS that is losing support by 2020

$800+
Worldwide ASP of mobile computers in 2015

$12B
Of Mobile Computers to be refreshed over next 4 years

Lots of Opportunity for all

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THANK YOU

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