

## **Tablet Market in Japan: Key Research Findings 2011**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on tablet market with the following conditions:**

1. Research period: March to June, 2011
2. Research target: Domestic mobile communication service providers, domestic cell phone manufacturers, cell phone/smart phone manufacturers overseas, contract manufacturers overseas, PC makers overseas, domestic component manufacturers, and other organizations in the industry
3. Research methodologies: Face-to-face interviews, telephone/email surveys, and literature research

#### **<What is a Tablet?>**

A tablet in this research is defined as follows:

1. Terminal that can enhance and customize functions by installing applications
2. be equipped with an internet browser
3. be able to align with PCs and cell phones
4. be able to develop applications in an open platform (=able to freely develop applications and enter into the market)
5. be equipped with a display equal to/more than 5.0 inches (5.0, 7.0, 8.9, or 10.1 inches)
6. be equipped with OS for smart phones or for PC

\*3G (UMTS/W-CDMA/HSPA) or verbal communication features are not required.

The conditions 1-4 above are the same as those of smart phones. The defined conditions are largely related with the fact that various products are made by communications device manufacturers. We defined the difference between tablets and smart phones to be the display size (tablet has a display equals to or larger than 5.0 inches.) Electronic book reader is omitted from the required functions.

### ◆ **Key Findings**

#### ■ **Domestic shipment for tablets in FY 2010 rose to 966 thousands**

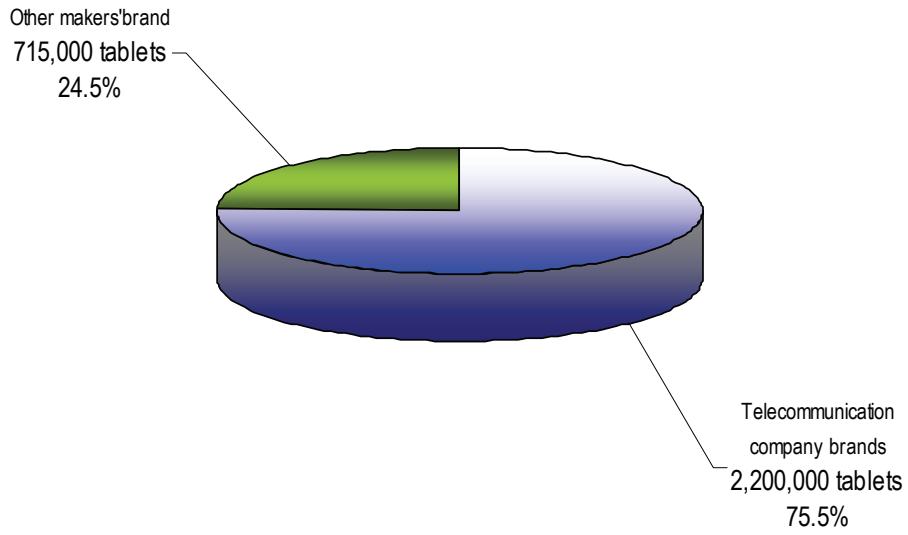
Number of tablets shipped in FY 2010 was 966 thousands, most of which were from overseas manufacturers. In FY 2011, the market is expected to grow up to 2.915 million, out of which 75.5 % are predicted to be dominated by the brands from communication providers, and WiFi models are predicted to occupy 57.6% of the market by model.

#### ■ **20.255 million tablets shipped globally in FY2010**

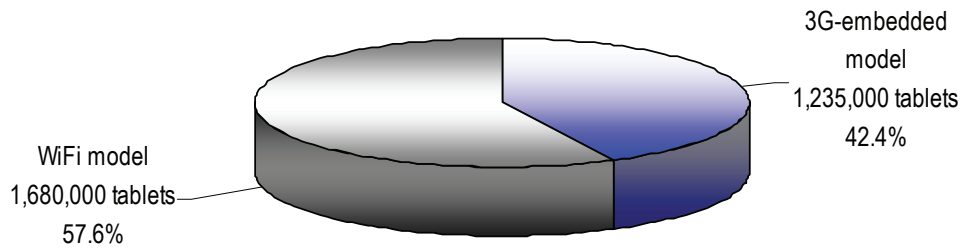
In FY 2010, 20.255 million tablets were shipped globally. Most of the tablet providers were communication device manufacturers who were able to utilize their experiences of developing smart phones. However, the market as whole has just been launched with only a small numbers of market entrants and product models. Given that manufacturers of PCs and AV devices are said to enter the market in FY 2011, despite many challenges to be solved, such as competition against smart phones and improvement needed in environment for contents application development, this immature market is



**Forecast of domestic tablet market share by sales route in 2011**



**Forecast of domestic tablet market share by model in 2011**



## Transition of global tablet market size

