



A Vision for the Future of Technology New Trends for a New Era

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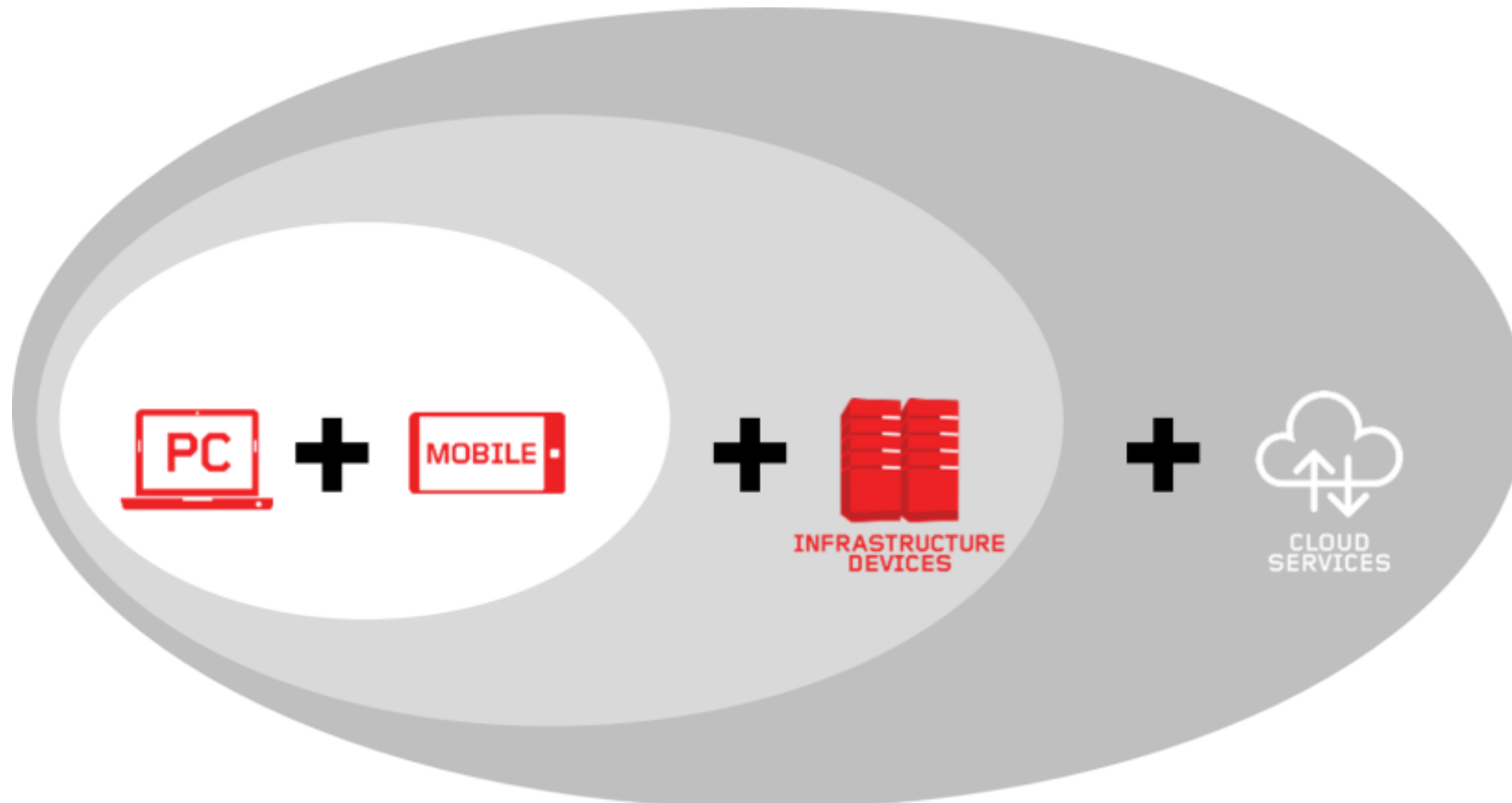
Chairman and CEO, Lenovo

March 24, 2015



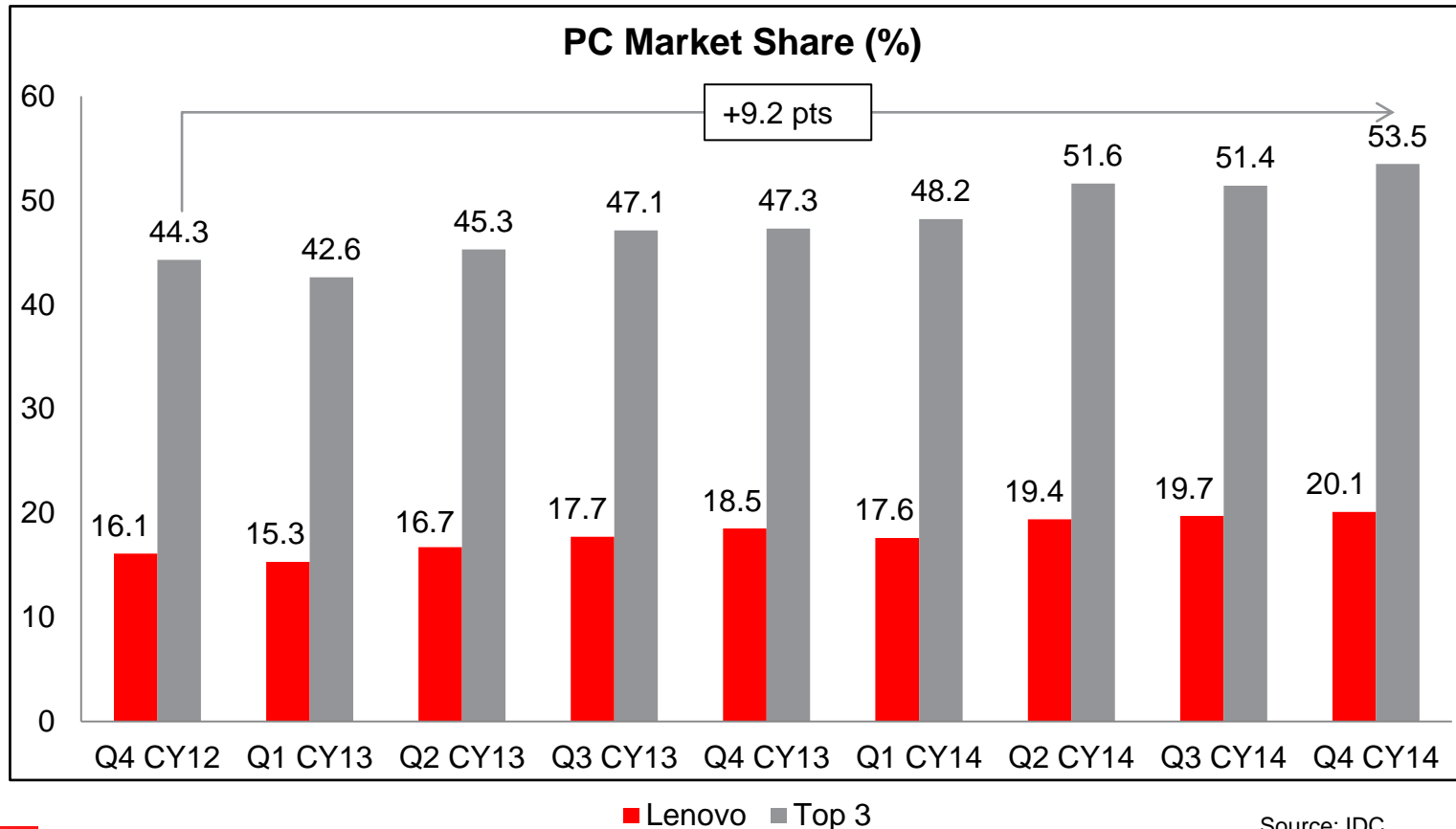
One Word to Define Our Industry: CHANGE

- Our Industry: **full range** of internet devices, infrastructure, services and applications
- New technologies, business models **constantly disrupt** the industry
- Companies like **Lenovo must be at forefront** of changes and understand the trends



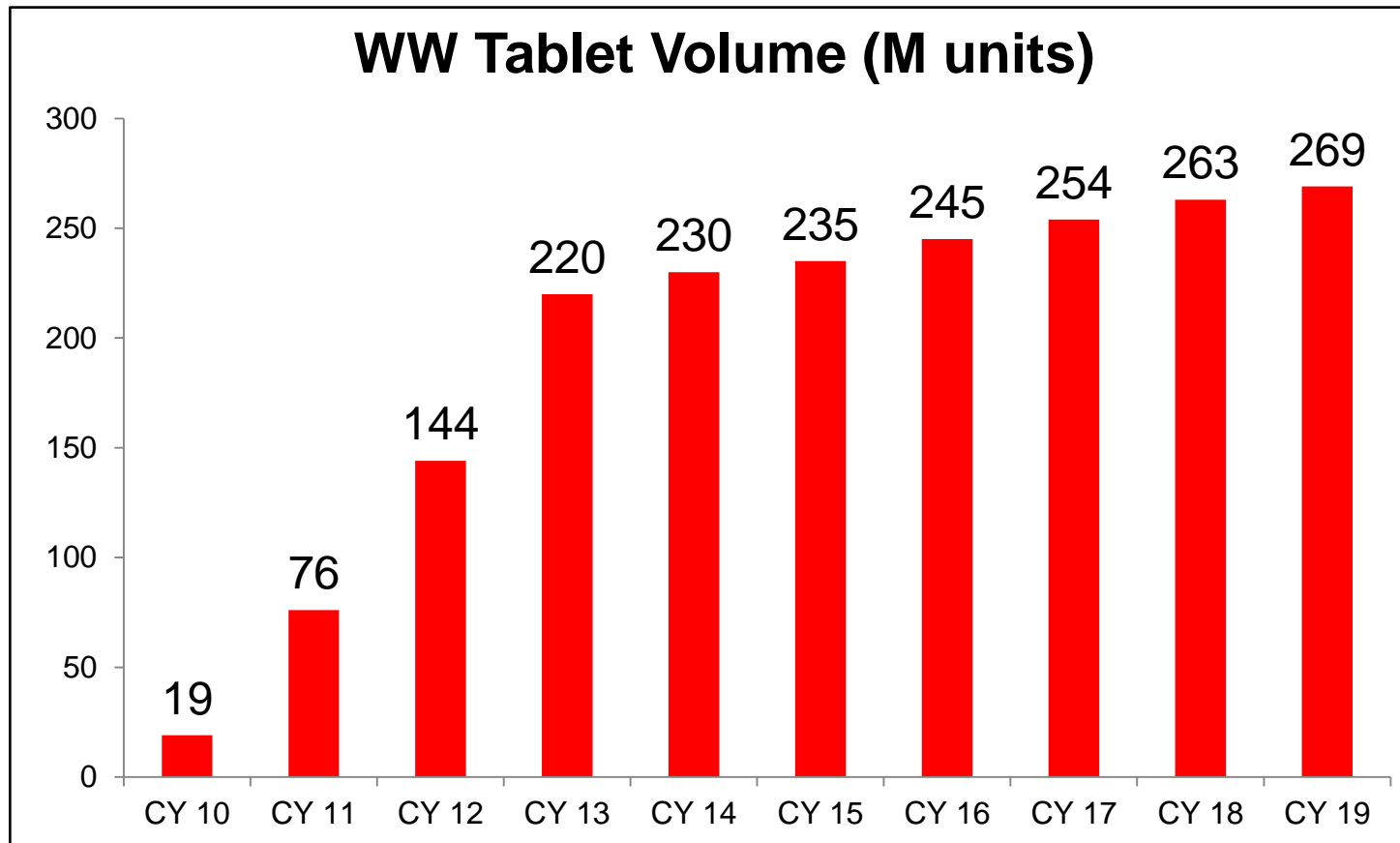
PC Consolidation

- PC market consolidation is accelerating
 - Top 3 players account for **53%** of market share, up more than **9 points** in last two years
 - Second tier players lack scale to compete effectively
 - As **market leader**, we believe this as an opportunity to continue winning with innovation



Tablet Growth Flattening

- Many thought tablets would cannibalize PC sales
 - Instead, created **more demand for multi-mode** PCs
 - Tablet market now leveling off
 - Tablets becoming **niche product** for media consumption

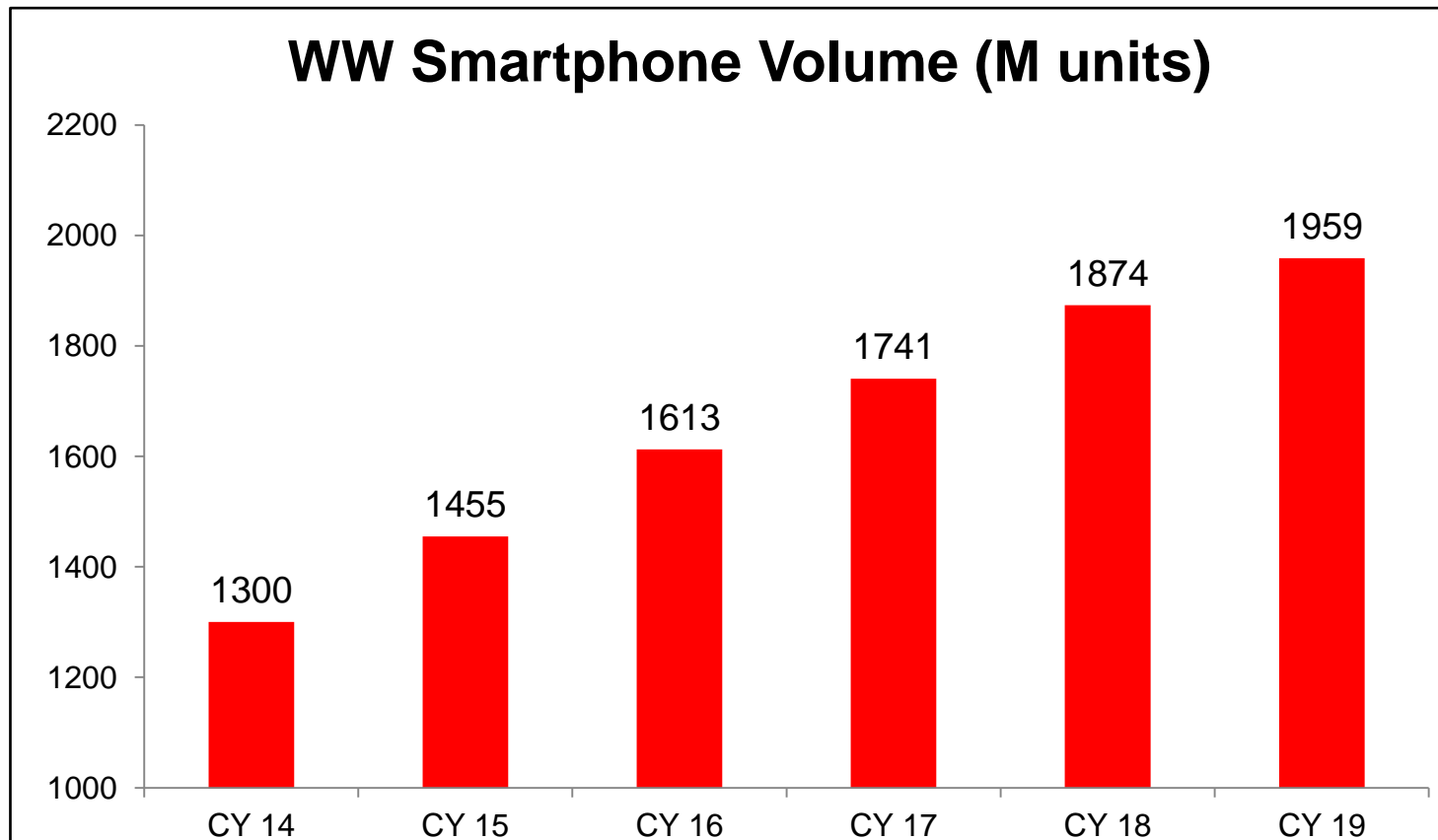


Source: IDC



Smartphone Growth

- Smartphones: Growth opportunity, especially in emerging markets
- Connectivity and **user experience now the key**
- Smartphones likely to become the **hub** in Internet of Things world



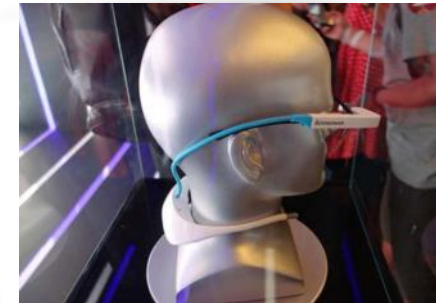
Source: IDC



lenovo

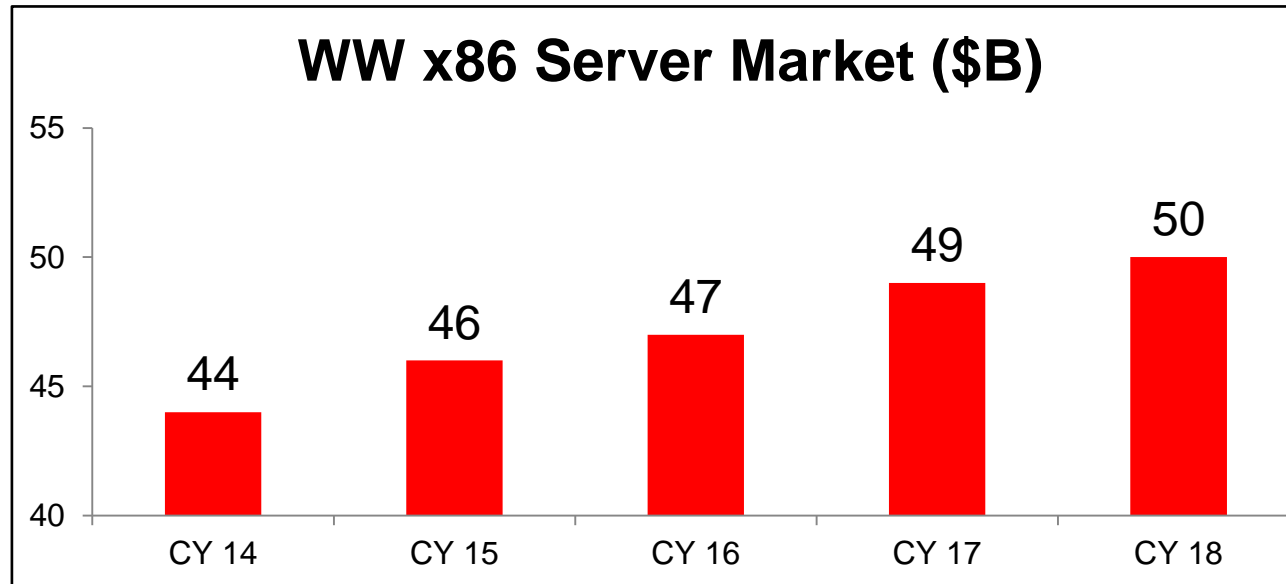
Wearables Future: The next Smartphone? Or Next Tablet?

- We have seen some exciting products from multiple players.
- The key question: Will wearables become like smartphones or tablets?



Servers Remain a Growing Market

- Smartphones, cloud computing, social media and big data driving **explosive growth**
- A growing market, especially in **Emerging markets**
- Lenovo has proved our servers are strong enough to handle **massive demand**
- **Virtualization trend** in computing, storage and network will drive up server demand



Source: IDC



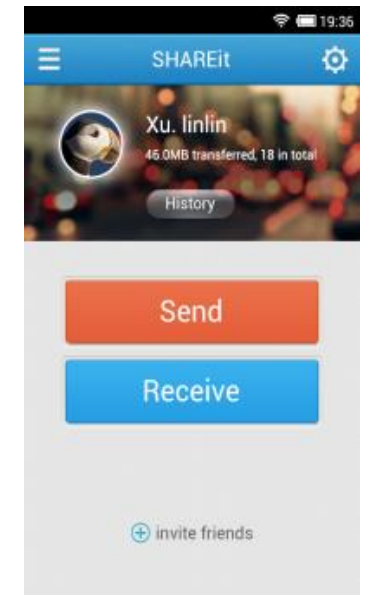
Rise of the Social Mobile Internet

- 71% of people more likely to make purchase based on **social media** recommendation
- Now companies can better collect feedback and **engage** customers
- Treat all customers as “**Relationship**” customers
 - Interact at touch points **before, during and after** each device is sold
 - It changes my job too! Follow me @yuanqing_lenovo on Twitter



Experience is KING

- By 2017, more than **50%** of product investment will target user experience
- Companies that understand and **solve pain points** will win
 - Yoga
 - SHAREit
- Potential for customized products



Exciting Journey Ahead

- Recap
 - Future of key product categories
 - Social Media Internet
 - Experience is KING
- Only companies that can **proactively evolve and adapt** will thrive and lead
- Lenovo is working to **bring the best innovation and experience** to our customers



THANK YOU GRAZIE MERCI DANKE GRAZIAS 謝謝 СПАСИБО
GRACIAS OBRIGADO ありがとう DANK TAKK BEDANKT DAKUJEM