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Accelerating the Wearables Ecosystem

with Snapdragon Wear™ Platforms

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Discussion Today

- Wearables Market: Growth and Segmentation
- Qualcomm Vision, Strategy, Roadmap
- Accelerating the Wearables Ecosystem

Wearables Growth

Growing Segment



Consumer Enthusiasm for Wearable Devices Drives the Market to 28.4% Growth in 2020

IDC, March 2021

Google and Samsung unite to reboot Android watches, with a dose of Fitbit too

CNET, May 2021

Apple Watch surpasses 100m sales – and it's growing faster than ever

Wearable, February 2021

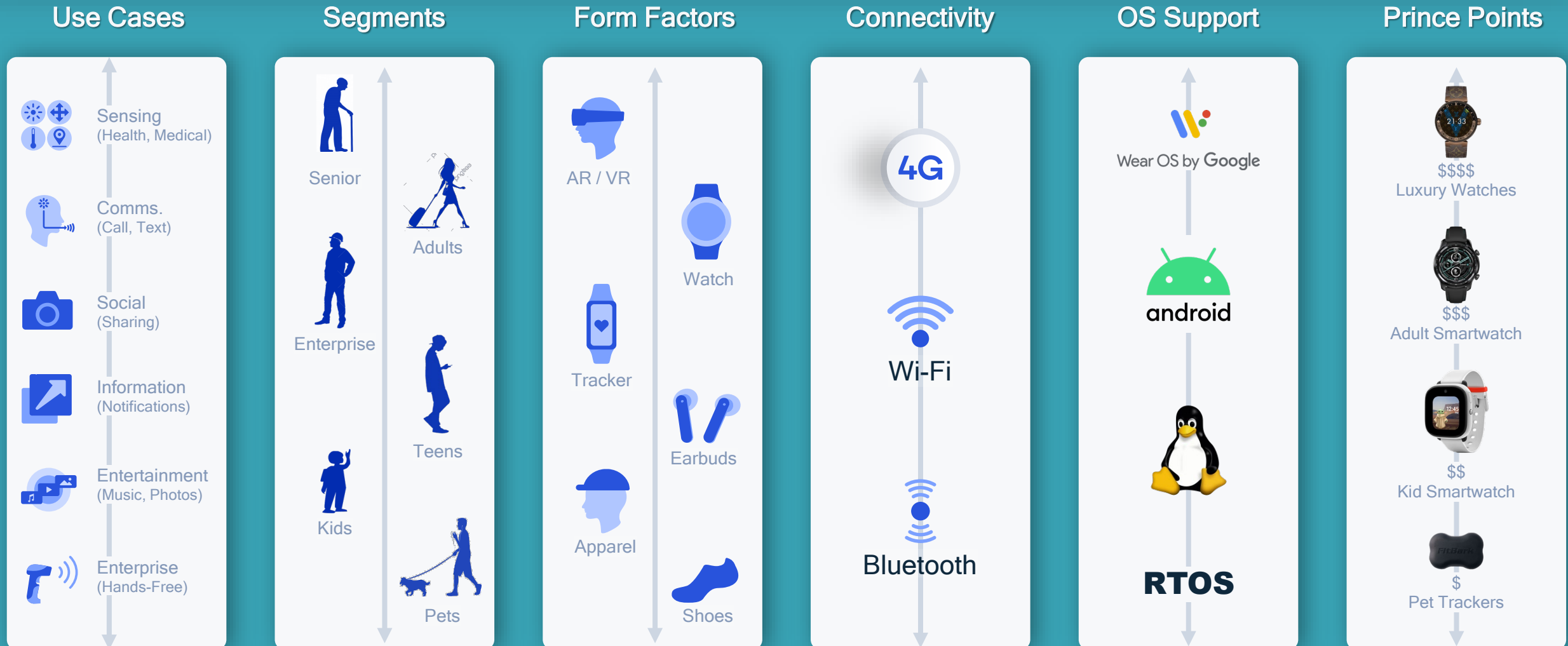
Wearables Market Jumps as New Form Factors Emerge

Campus Research, June 2021

Pandemic lifts sales of wearable gadgets

Economic Times, June 2021

Wearables Hyper-Segmentation Underway



Our Vision

Today

Best Mobile Experience = Smartphone



Tomorrow

Best Mobile Experience = Smartphone + Smartwatch + Earbuds

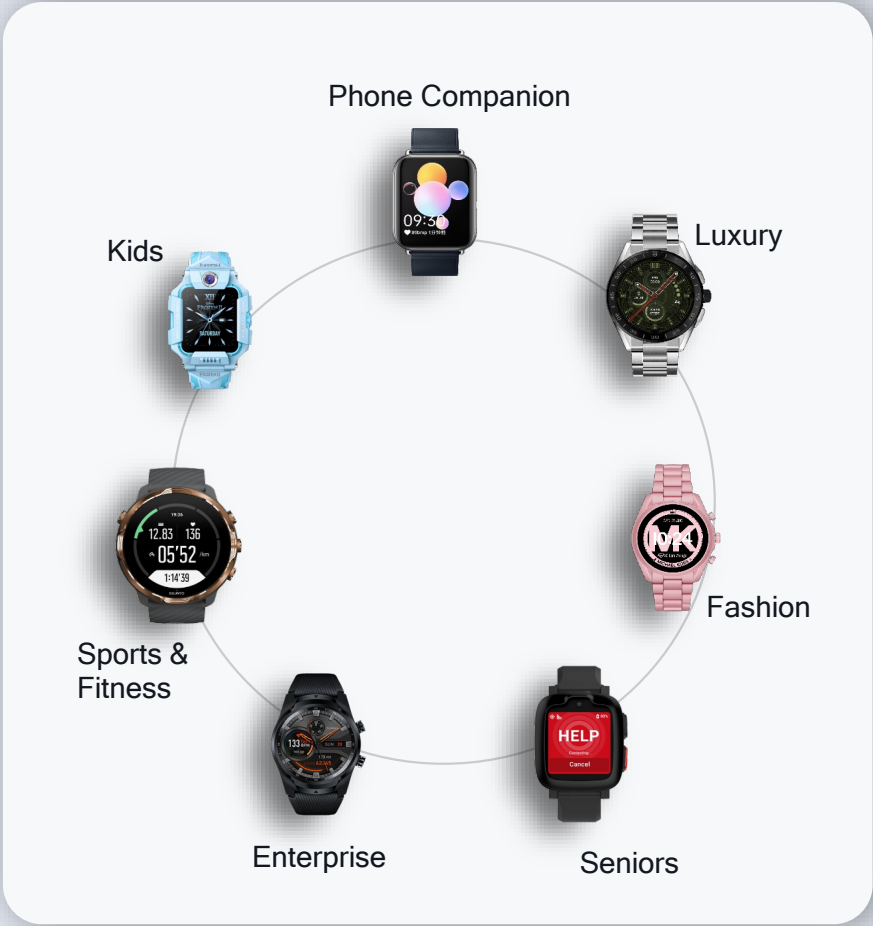


Smartwatch Evolution

Yesterday
One-Size-Fits-All

Today
Have-It-Your-Way

Tomorrow
Your Personal Concierge



Up to **5+ days**
Interactive Mode

Up to **2+ weeks**
RTOS Mode



Always **ON**
Always **Connected**



RICHER
Experiences



BETTER
Together

Kids Watch Evolution

Yesterday
Make calls

Today
Rich, Immersive Experiences

Tomorrow
Learning + Gaming Friend



Advanced
**AI / MACHINE
LEARNING**



Virtual
ASSISTANTS



Integration with
EDUCATION
content platforms



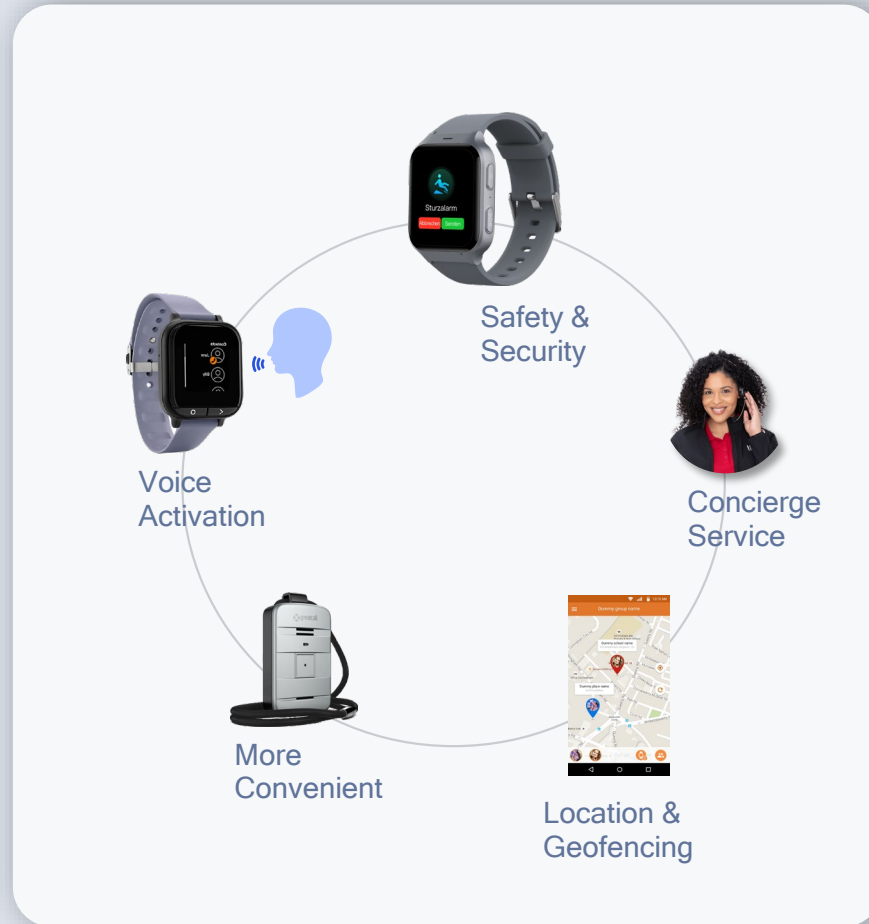
Watch as game
CONTROLLER

Senior Wearable Evolution

Yesterday
Jitterbug

Today
Always with you

Tomorrow
Health & Wellness Companion



Smaller, Sleeker
FORM FACTORS



More engaging
EXPERIENCES



Remote Patient
MONITORING



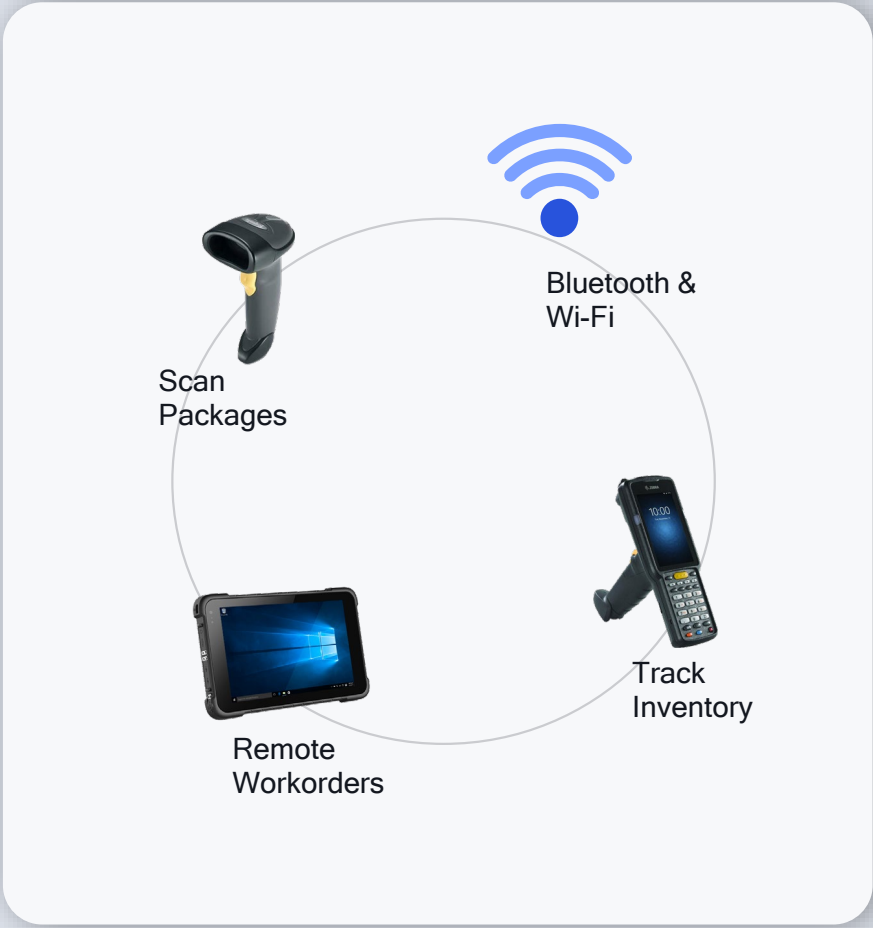
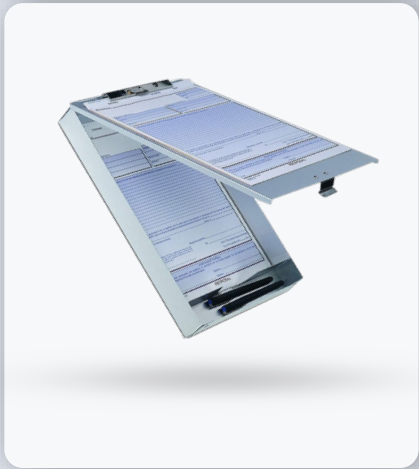
Integration with
HEALTH SYSTEMS

Enterprise Evolution

Yesterday
Clipboard

Today
Handheld

Tomorrow
Wearable



HANDS-FREE
Usage



Real-time
CONNECTIVITY



Location & Environmental
SENSING



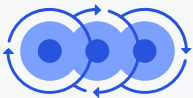
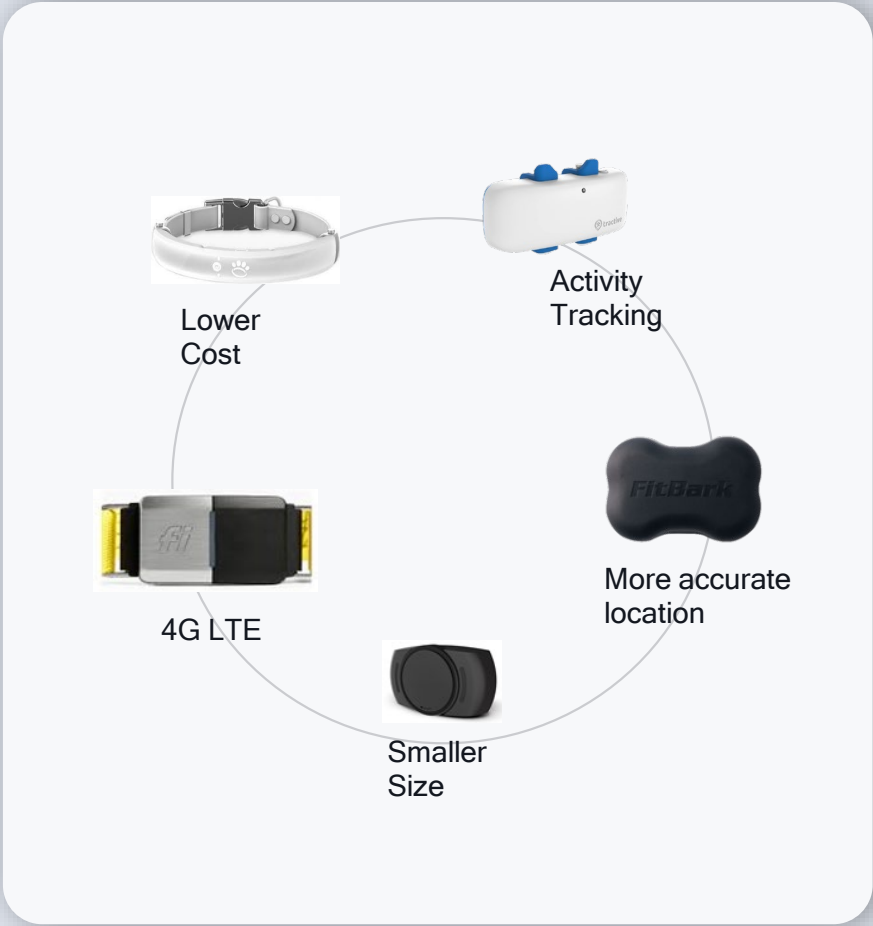
Secure Integration with
ENTERPRISE

Pet Tracker Evolution

Yesterday
Bluetooth

Today
4G Connected

Tomorrow
Widespread Adoption



Integrated with pet
ECOSYSTEMS



Low power CAT M1
CONNECTIVITY

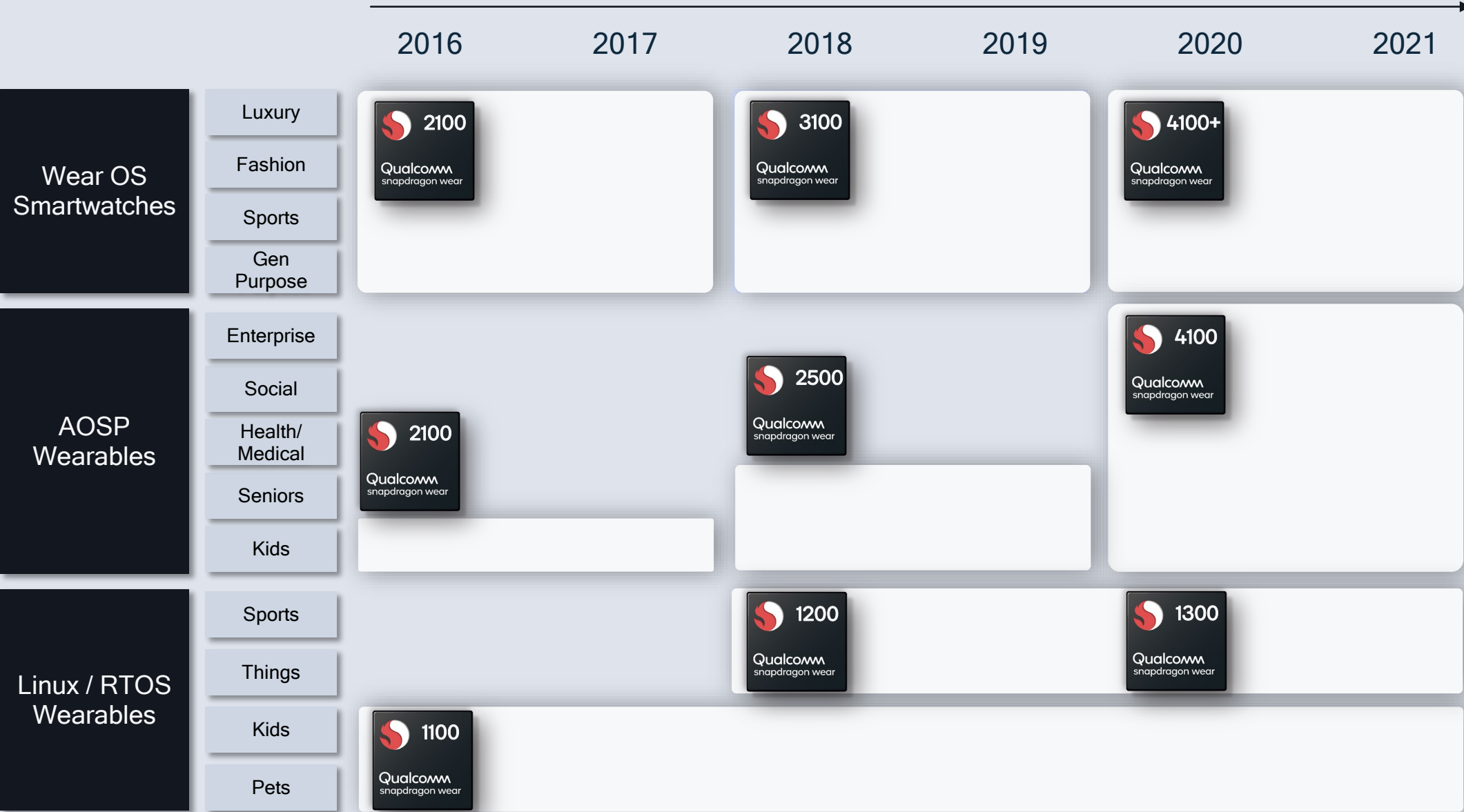


Health & Wellness
SENSING



Behavioral
MONITORING

Industry Leading Platforms Across Segments



Global Wearables Momentum



40Mu

Snapdragon Wear Platforms
Shipped*

One Unit Shipping Every

20 seconds[†]



Global Wearables Momentum

75+

Customer Brands Deployed

250+

Customer Product Launches



Global Wearables Momentum



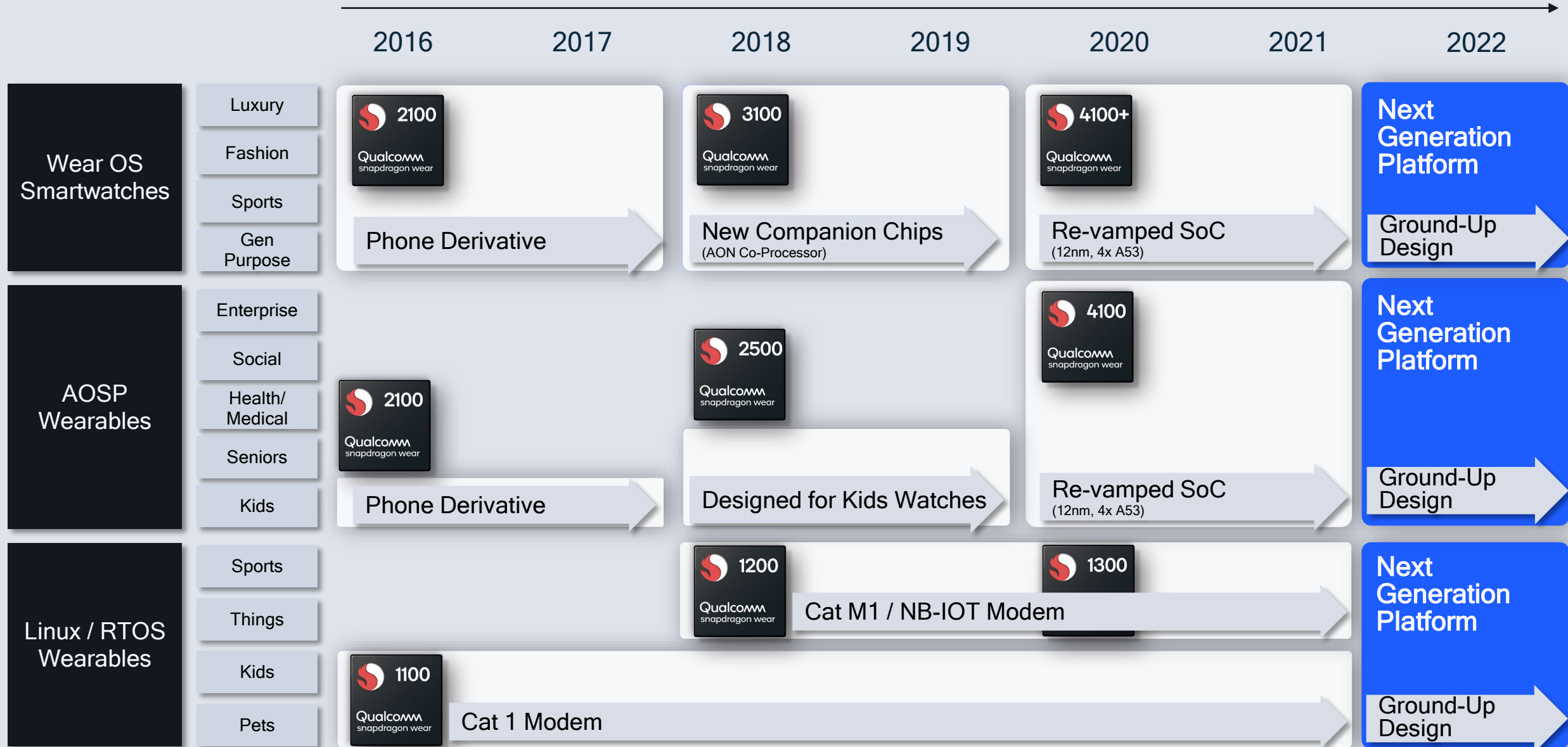
Global Wearables Momentum



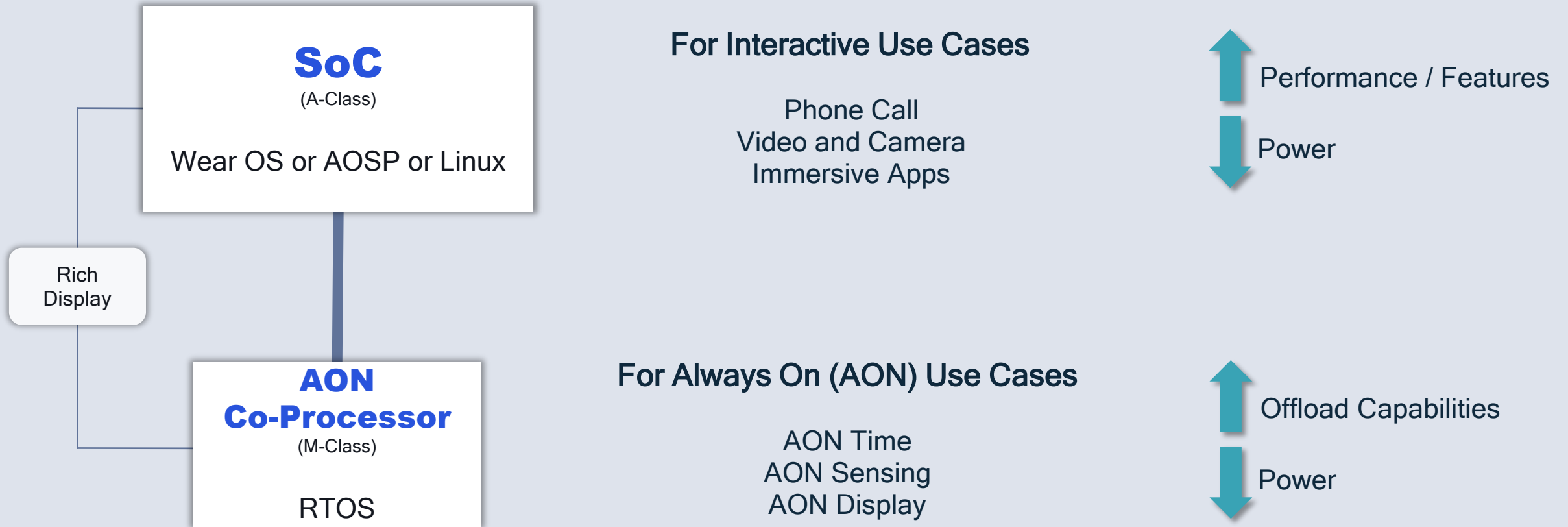
25+

Mobile Operators

Significant Increase in Wearables Investments



Scalable Approach for Diverse Needs



Best of Both Worlds !!!

It Takes an Ecosystem To Accelerate Growth



Goal: Deliver The BEST User Experience

**Device
Manufacturers**

OEMs
ODMs

**Apps
Content**

ISVs
Content Providers
Cloud Players

**Displays &
Sensors**

IHV
Display Vendors

**UX / UI
ID**

SIs
Design Firms

**Services
Network**

Operators
MVNOs
Retail

Qualcomm Snapdragon Wear: Building The Foundation

Announcing Today: Wearables Ecosystem Accelerator Program

GOALS



GROW Wearables
w/ differentiated
user experiences



ACCELERATE
innovation amongst
stakeholders



FACILITATE industry
collaboration



DRIVE lower cost &
faster TTM

MEMBERS

OEMs / ODMs

Operators

IHVs / ISVs / SIs

OS Platforms

ACTIVITIES

- Matchmaking Events
- Industry Trends
- Technology & Product Direction
- Prototypes & Demos
- Product Launches
- Co-Marketing

Wearables Ecosystem Accelerator

Join | Learn | Grow
Forget the rest of it

Building the future of wearables through ecosystem innovation.

The Qualcomm® Wearables Ecosystem Accelerator program connects wearable hardware and software technology providers, component vendors and system integrators with consumer and enterprise OEMs, ODMs, mobile operators and platform providers. The goal of this program is to accelerate the adoption of wearables and reduce development time through building collaborative relationships across the wearables value chain. We're helping ecosystem members to optimize their solutions using the Snapdragon Wear™ Platform so that manufacturers can quickly adopt innovations to their products and commercialize them.

Providing expert support to help fast track innovation.

Faster time to commercialization
Member companies offer a comprehensive portfolio of hardware and software solutions that can be utilized with Snapdragon Wear platforms to help address a wide range of wearable segments including but not limited to consumer, kids, enterprise, health and medical. By working with third parties who have successfully used our technology previously, mobile operators, OEMs and enterprises could accelerate the development of wearables to help meet their roadmap needs.

Increased business opportunities
The program focuses on nurturing joint business opportunities with and among member companies. Members also receive priority access to compelling opportunities for amplification of collaboration results.

More intelligent, connected wearables
Our industry leading ultra-low power wearable platforms designed for super-fast performance and connectivity are helping to usher in a new era of smart connected wearable products. With a breadth of solutions addressing diverse segments, we're helping deliver differentiated user experiences to address customer needs.

How does the program work?

This Wearables Ecosystem Accelerator is an invite-only program for ISVs, IHVs, and solution providers that are developing solutions for the family of Snapdragon Wear platforms.

OEM					Platform		Operator				
											
											
											
											
ODM					IHV		ISV				
											
											
											

ANNOUNCING TODAY:

Wearables Ecosystem Accelerator Program

First Members

ANNOUNCING
TODAY:

Wearables
Ecosystem
Accelerator
Program

Inaugural Summit

Coming Fall 2021







Summary

- **Wearables Market: Growing and Segmenting**
- **Qualcomm Accelerating Investments in Wearables**
 - Range of platforms across segments
 - 40Mu+ shipped across 100+ countries with 75+ OEM brands and 25+ operators
 - Ground-up designs coming
- **Ecosystem Collaboration Essential for Innovation; Announcing Today**
 - Wearables Ecosystem Accelerator
 - First members
 - Inaugural summit in Fall '21



Thank you

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