



The United States AI Enabled Personal Computing Devices Market Size and Ten-Year Forecast October 2024

Our Approach

The Daniel Research Group's **EquilibriumSolver (EQS)** is a forecasting methodology and application that utilizes a combination of long-term market trends, current unit shipments and revenue data, and analyst assessments of influencing economic, demographic, and market factors. The purpose of the **EQS** is to generate forecasts that are highly predictive by incorporating both mathematical calculations and insights from external sources.

The **EQS** algorithm considers variables such as Total Available Market (TAM), Penetration, Density, and Replacement Rate trends, as well as actual reported year-to-date data on unit shipments and revenue. Additionally, it incorporates the insights and expertise of our analysts regarding the magnitude and direction of major causal factors influencing the market.

By leveraging this comprehensive set of inputs, the **EQS** algorithm calculates forecasts for key variables and metrics. The algorithm aims to converge on the most likely forecast for each variable based on the provided input data and parameters. The resulting forecasts are expected to be both mathematically consistent and aligned with the narrative developed from external data, information, and analysts' knowledge and insights.

In summary, the core algorithm of the **Daniel Research Group's EquilibriumSolver** is designed to generate highly predictive forecasts by considering a wide range of factors and data, resulting in forecasts that are mathematically sound and consistent with the overall market narrative.

The Forecasting Challenge

Personal Computer, Tablet, and Smartphone vendors are beginning to introduce next generation products capable of supporting artificial intelligence (AI) applications and capabilities. The immediate challenge is to determine the rate at which AI devices will penetrate the overall personal device market in terms of Unit Shipments, Installed Base, and percent of Households and Business buying and using AI devices

Consumer and Enterprise buyers will have a choice to replace their exiting devices with an AI device or a non-AI device for at least the next two to three years, The rate that they will choose the AI device is almost entirely based on the availability of compelling applications that warrant the higher cost of the AI device, as well as overcoming the trust, privacy, security, and operational concerns. At the moment these compelling applications **do not exist**. AI adoptions has been almost entirely cloud based to date. However, we do expect these compelling applications to become available shortly.

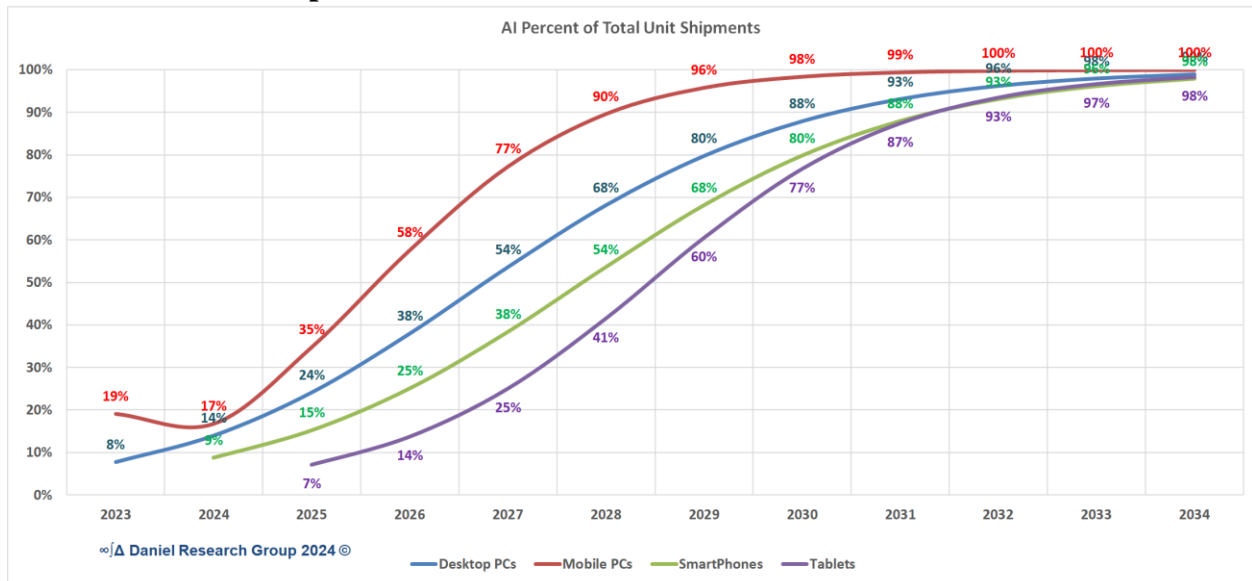
The core **EQS** algorithm computes Unit Shipments as a function of four variables,

1. **Total Available Market (TAM)** – The number of Households and Business is unaffected by the introduction of AI devices
2. **Penetration Rate** – The percent of the TAM that owns and uses at least on device. If AI devices accelerate the Penetration Rate, it will be after compelling applications become available, than the only slightly.
3. **Density** – The average number of the device owned and used in a Household or Business that own and use at least one device. **DRG** does expect a percentage of users to purchased AI devices early in anticipation of future compelling applications to become available.
4. **Replacement Rate** – **DRG** does anticipate a slight increase in the replacement rate reflecting early buyer activity. Longer-term the overall replacement rate will not be effected by the introduction of AI devices and will continue to be reflective of economic conditions.

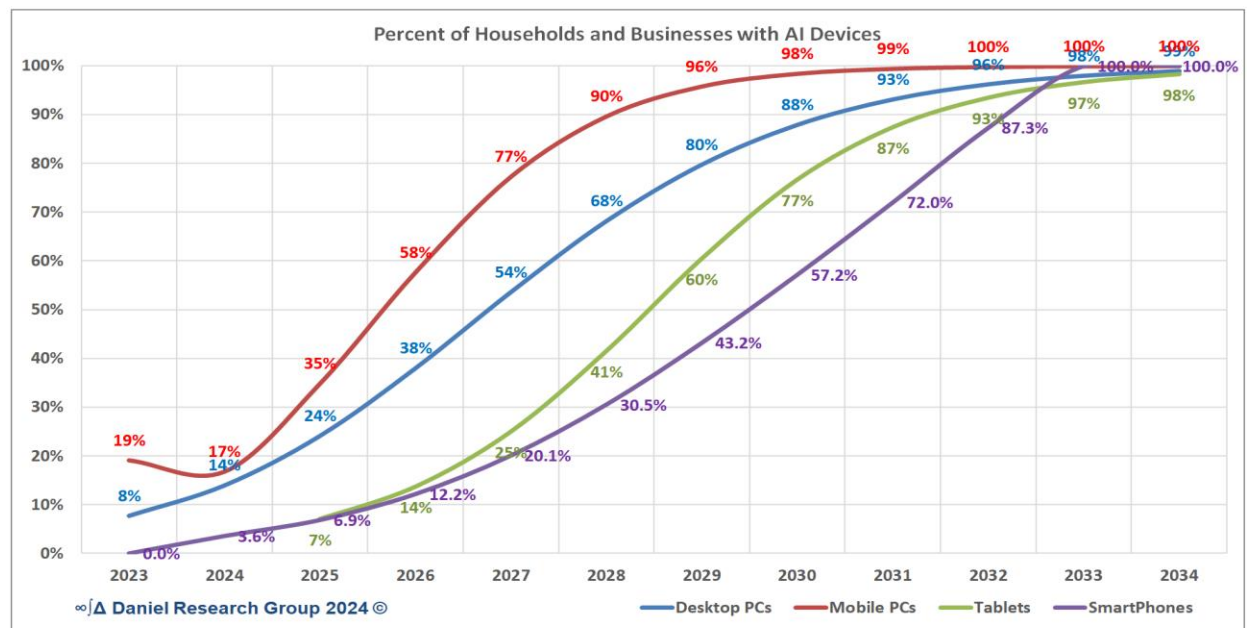
Existing and new companies are investing in developing and marketing compelling AI applications for devices, as well as the services to support those applications. These companies require accurate estimates of the total available markets, and its' growth, in order to make their investment, development and marketing decisions. Specifically, they require estimates of the number of Households and Business that have purchased and are using AI Devices and the size of the installed base of AI Devices, and their growth rates. **DRG** has added additional **EQS** models to produce these market sizes and growth rates for all the products, form factors and segments it currently covers.

AI Market Penetration Charts

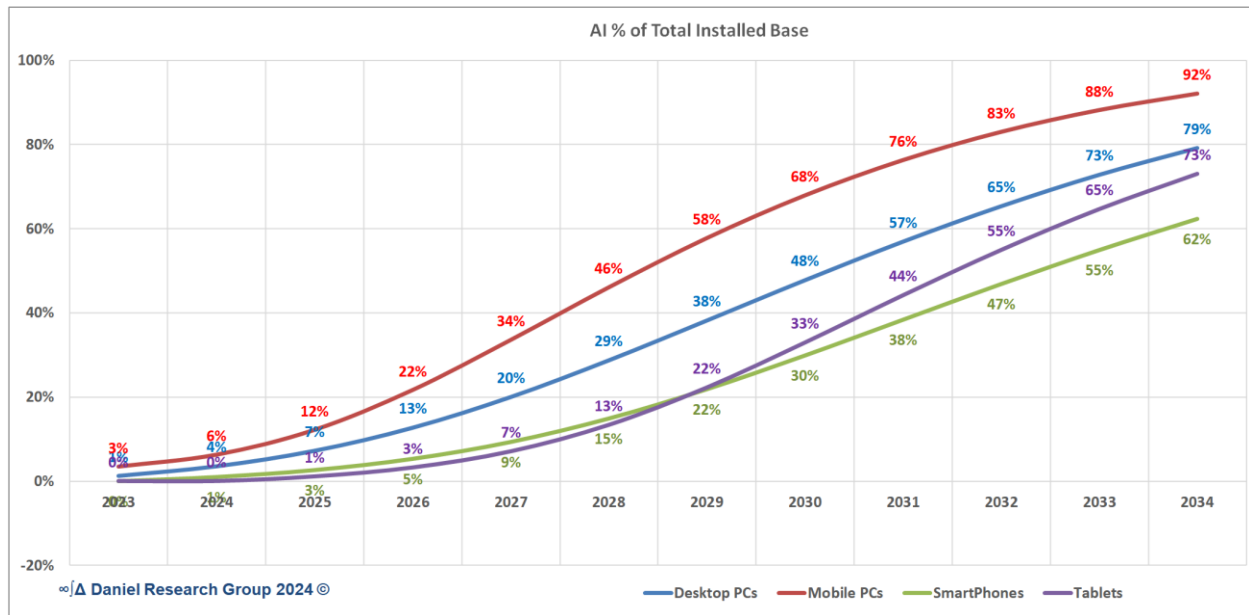
AI Percent of Unit Shipments



AI Market Penetration of Households and Businesses that own the Device



AI Percent of Installed Base

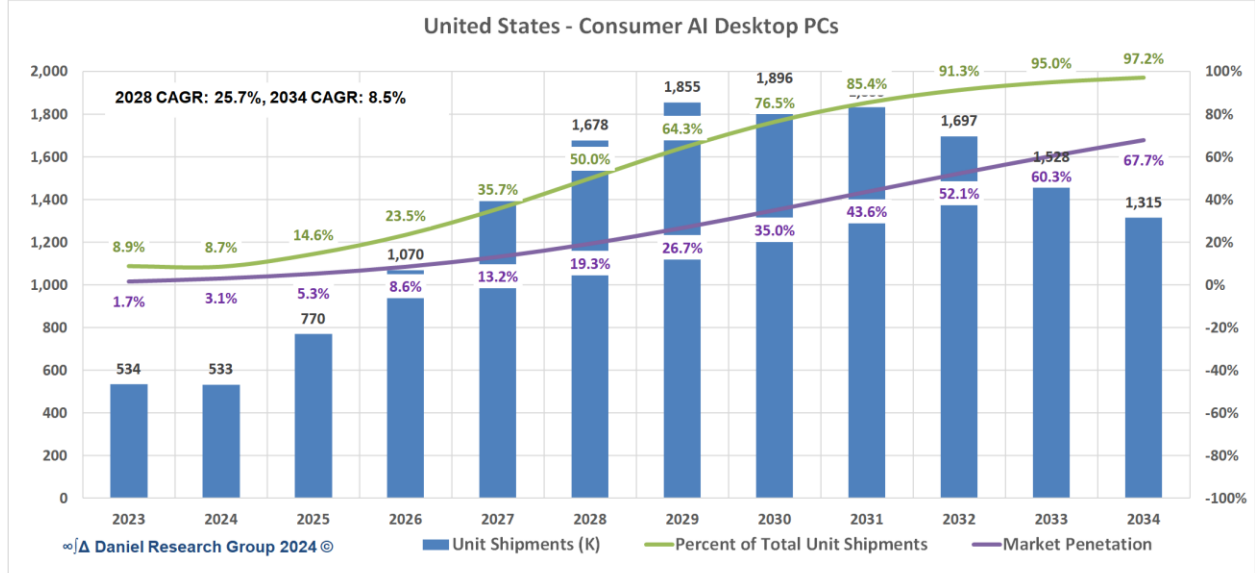


Forecast Tables and Charts

Desktop PCs

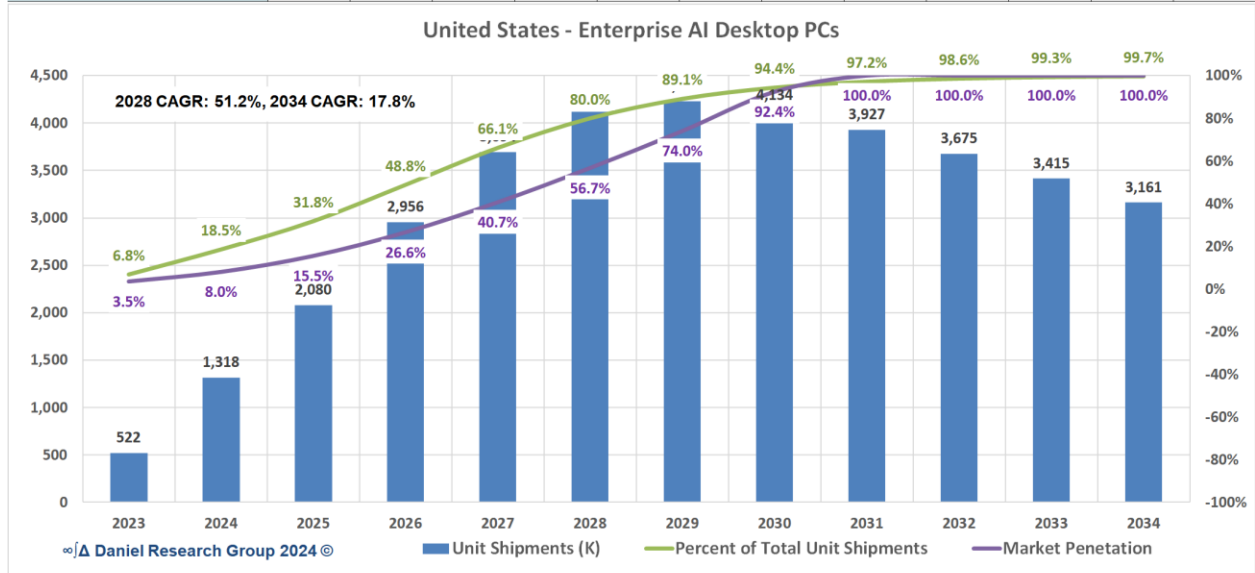
Consumer

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	534	533	770	1,070	1,395	1,678	1,855	1,896	1,833	1,697	1,528	1,315
AGR		0%	45%	39%	30%	20%	11%	2%	-3%	-7%	-10%	-14%
Percent of Total Unit Shipments	8.9%	8.7%	14.6%	23.5%	35.7%	50.0%	64.3%	76.5%	85.4%	91.3%	95.0%	97.2%
Market Penetration	1.7%	3.1%	5.3%	8.6%	13.2%	19.3%	26.7%	35.0%	43.6%	52.1%	60.3%	67.7%



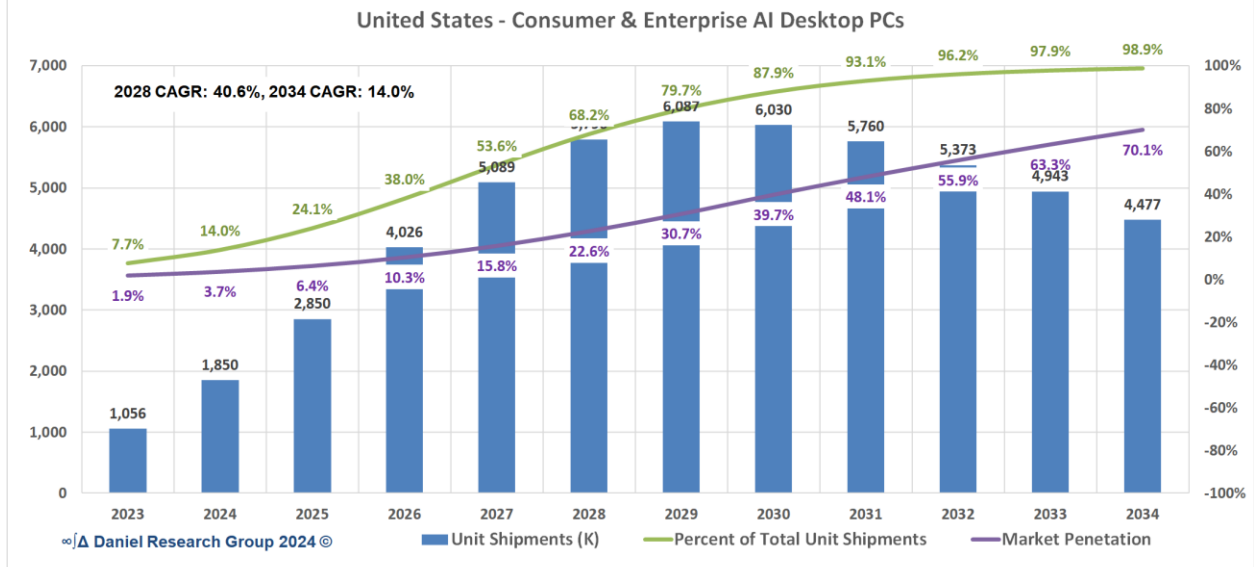
Enterprise

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	522	1,318	2,080	2,956	3,694	4,118	4,232	4,134	3,927	3,675	3,415	3,161
AGR		152%	58%	42%	25%	11%	3%	-2%	-5%	-6%	-7%	-7%
Percent of Total Unit Shipments	6.8%	18.5%	31.8%	48.8%	66.1%	80.0%	89.1%	94.4%	97.2%	98.6%	99.3%	99.7%
Market Penetration	3.5%	8.0%	15.5%	26.6%	40.7%	56.7%	74.0%	92.4%	100.0%	100.0%	100.0%	100.0%



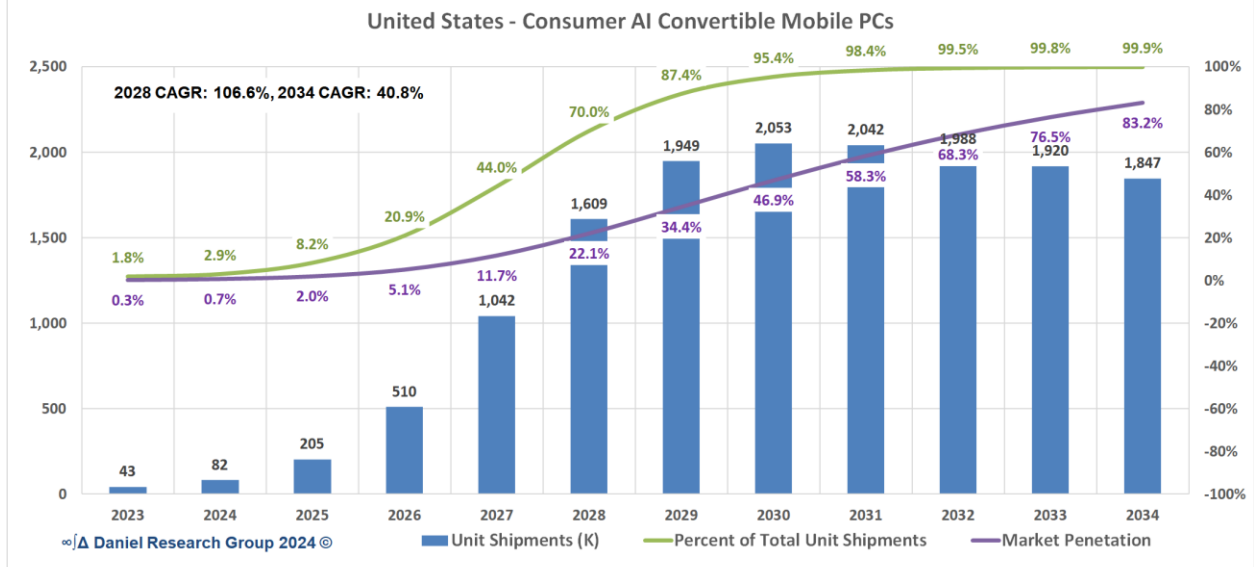
Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	1,056	1,850	2,850	4,026	5,089	5,796	6,087	6,030	5,760	5,373	4,943	4,477
AGR		75%	54%	41%	26%	14%	5%	-1%	-4%	-7%	-8%	-9%
Percent of Total Unit Shipments	7.7%	14.0%	24.1%	38.0%	53.6%	68.2%	79.7%	87.9%	93.1%	96.2%	97.9%	98.9%
Market Penetration	1.9%	3.7%	6.4%	10.3%	15.8%	22.6%	30.7%	39.7%	48.1%	55.9%	63.3%	70.1%



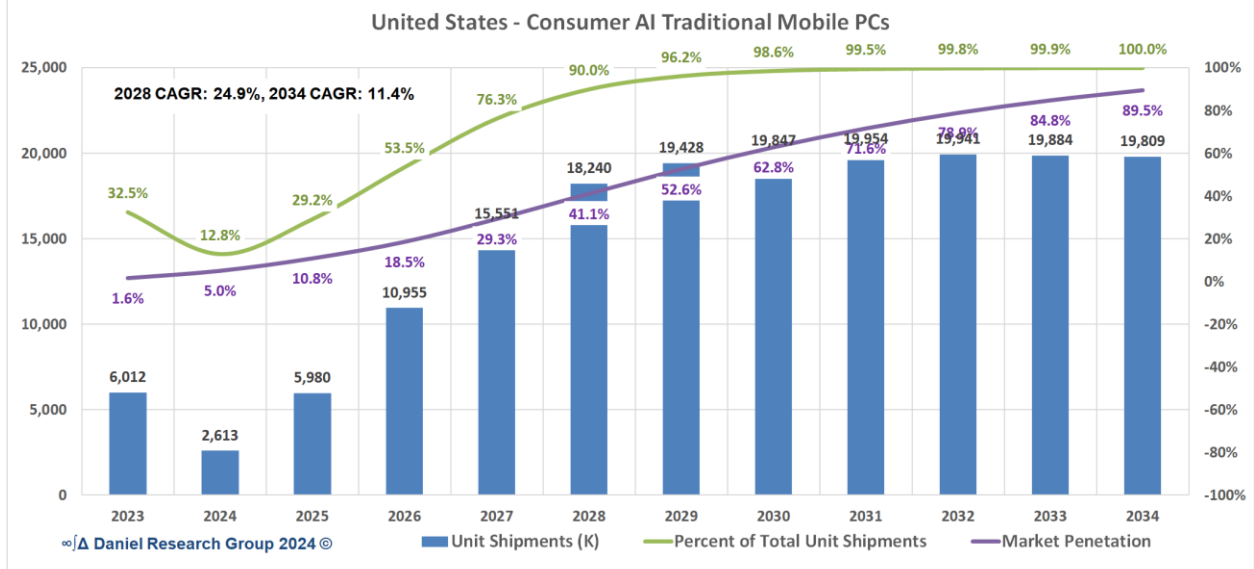
Mobile PCs Consumer Convertible

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	43	82	205	510	1,042	1,609	1,949	2,053	2,042	1,988	1,920	1,847
AGR		93%	148%	149%	104%	54%	21%	5%	-1%	-3%	-3%	-4%
Percent of Total Unit Shipments	1.8%	2.9%	8.2%	20.9%	44.0%	70.0%	87.4%	95.4%	98.4%	99.5%	99.8%	99.9%
Market Penetration	0.3%	0.7%	2.0%	5.1%	11.7%	22.1%	34.4%	46.9%	58.3%	68.3%	76.5%	83.2%



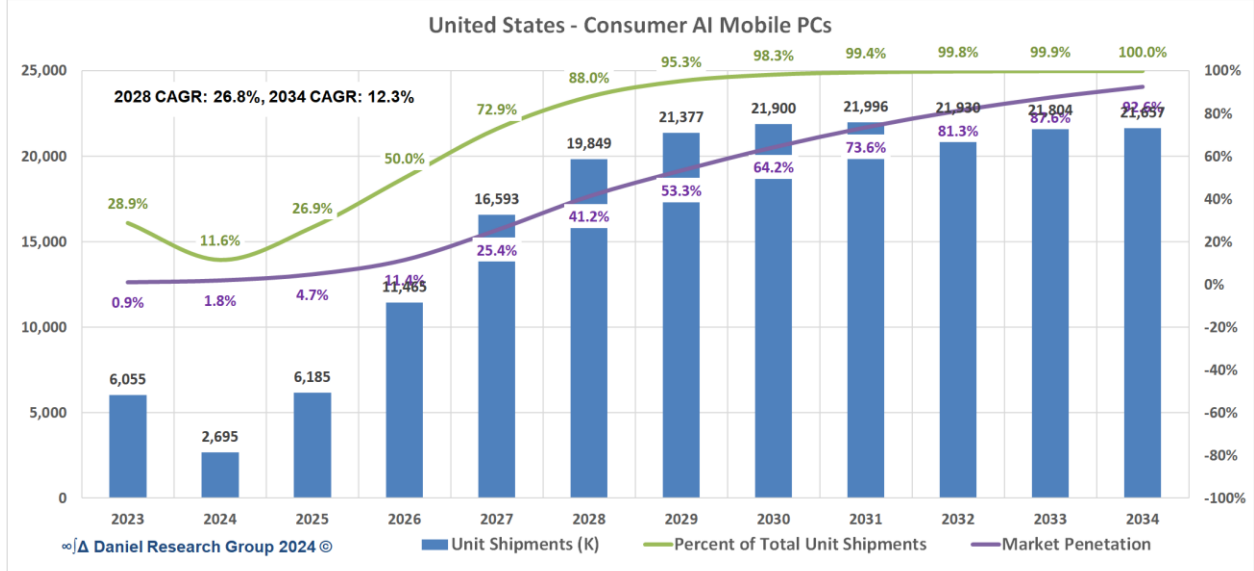
Consumer Traditional

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	6,012	2,613	5,980	10,955	15,551	18,240	19,428	19,847	19,954	19,941	19,884	19,809
AGR		-57%	129%	83%	42%	17%	7%	2%	1%	0%	0%	0%
Percent of Total Unit Shipments	32.5%	12.8%	29.2%	53.5%	76.3%	90.0%	96.2%	98.6%	99.5%	99.8%	99.9%	100.0%
Market Penetration	1.6%	5.0%	10.8%	18.5%	29.3%	41.1%	52.6%	62.8%	71.6%	78.9%	84.8%	89.5%



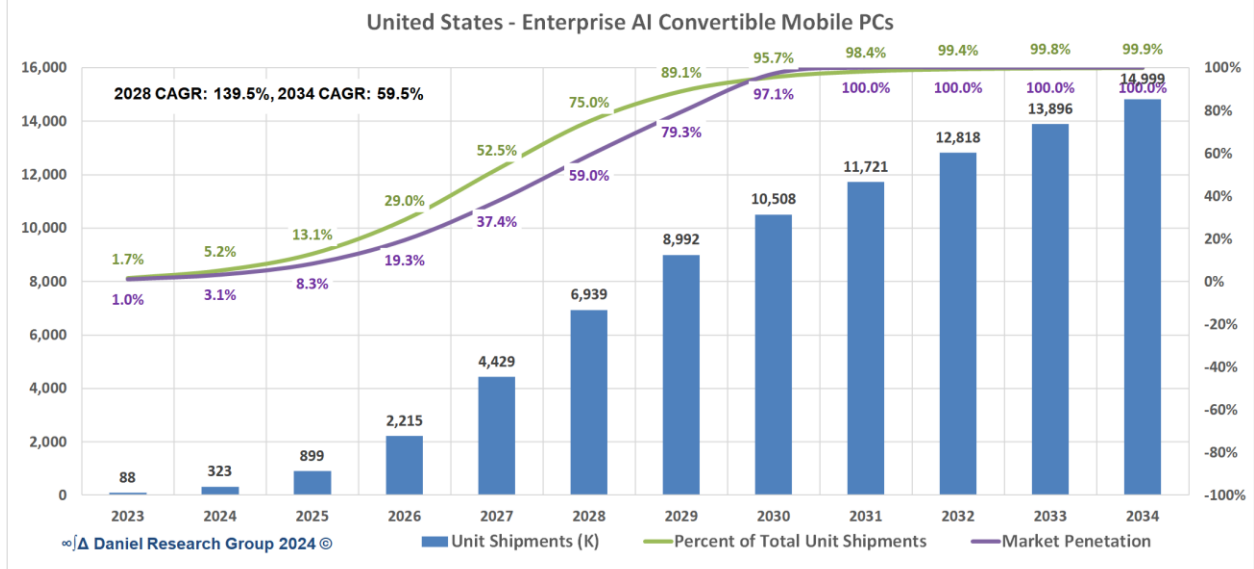
Consumer Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	6,055	2,695	6,185	11,465	16,593	19,849	21,377	21,900	21,996	21,930	21,804	21,657
AGR		-55%	129%	85%	45%	20%	8%	2%	0%	0%	-1%	-1%
Percent of Total Unit Shipments	28.9%	11.6%	26.9%	50.0%	72.9%	88.0%	95.3%	98.3%	99.4%	99.8%	99.9%	100.0%
Market Penetration	0.9%	1.8%	4.7%	11.4%	25.4%	41.2%	53.3%	64.2%	73.6%	81.3%	87.6%	92.6%



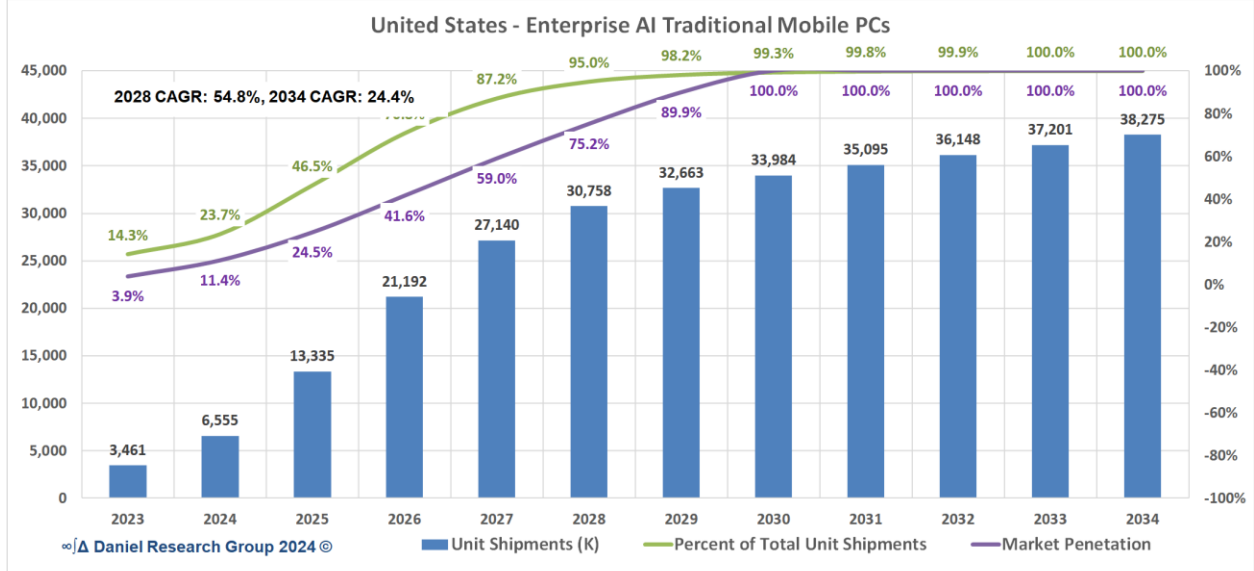
Enterprise Convertible

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	88	323	899	2,215	4,429	6,939	8,992	10,508	11,721	12,818	13,896	14,999
AGR		267%	178%	146%	100%	57%	30%	17%	12%	9%	8%	8%
Percent of Total Unit Shipments	1.7%	5.2%	13.1%	29.0%	52.5%	75.0%	89.1%	95.7%	98.4%	99.4%	99.8%	99.9%
Market Penetration	1.0%	3.1%	8.3%	19.3%	37.4%	59.0%	79.3%	97.1%	100.0%	100.0%	100.0%	100.0%



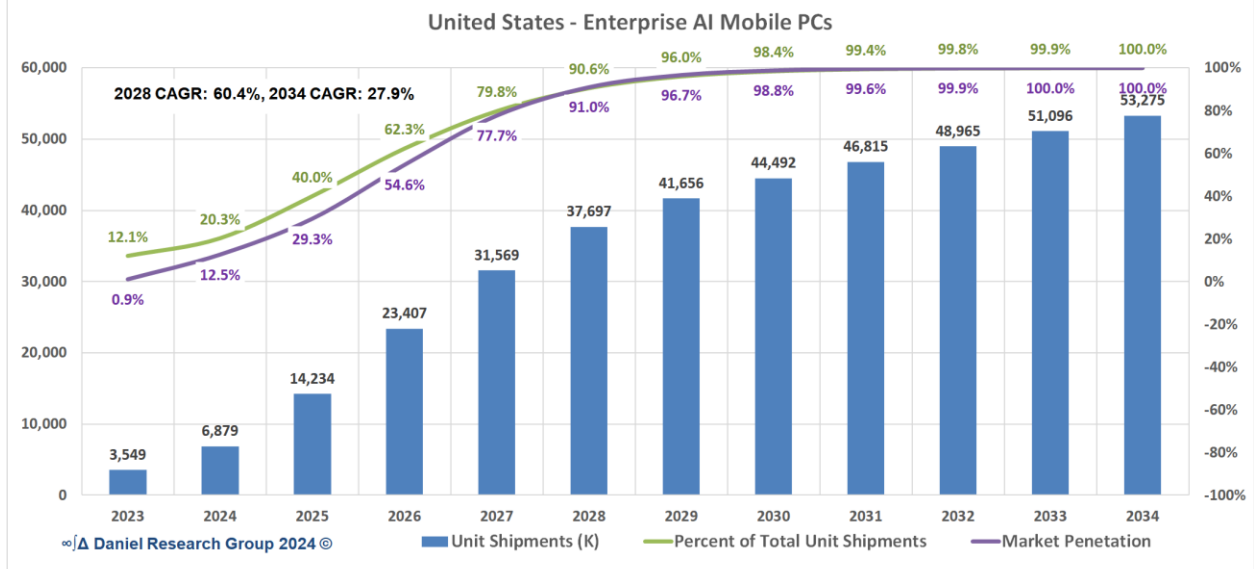
Enterprise Traditional

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	3,461	6,555	13,335	21,192	27,140	30,758	32,663	33,984	35,095	36,148	37,201	38,275
AGR		89%	103%	59%	28%	13%	6%	4%	3%	3%	3%	3%
Percent of Total Unit Shipments	14.3%	23.7%	46.5%	70.8%	87.2%	95.0%	98.2%	99.3%	99.8%	99.9%	100.0%	100.0%
Market Penetration	3.9%	11.4%	24.5%	41.6%	59.0%	75.2%	89.9%	100.0%	100.0%	100.0%	100.0%	100.0%



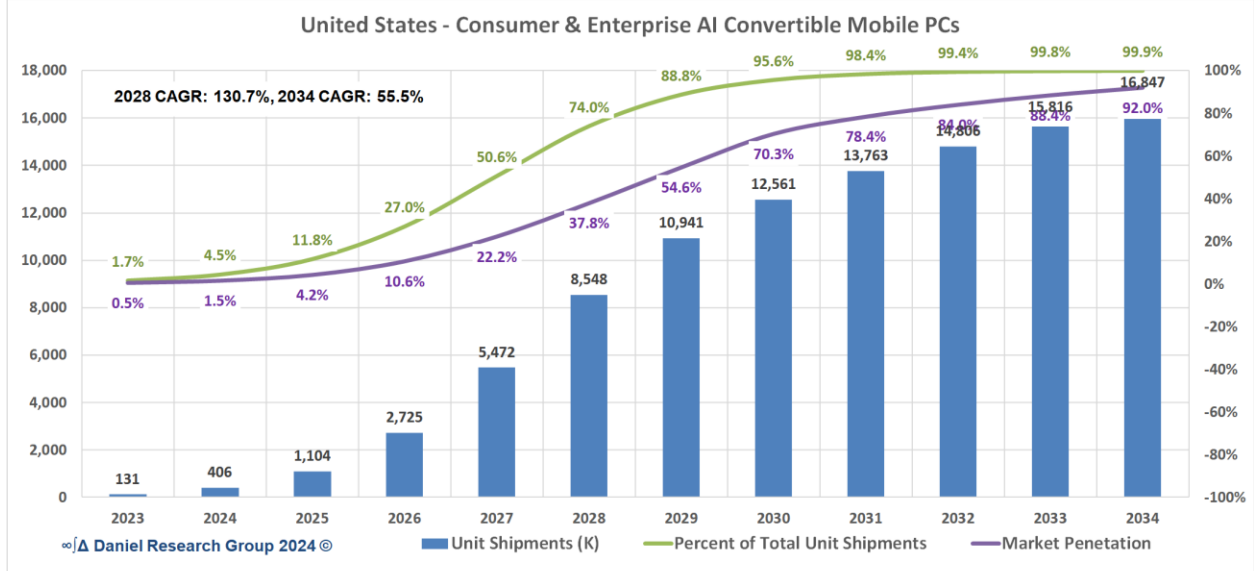
Enterprise Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	3,549	6,879	14,234	23,407	31,569	37,697	41,656	44,492	46,815	48,965	51,096	53,275
AGR		94%	107%	64%	35%	19%	11%	7%	5%	5%	4%	4%
Percent of Total Unit Shipments	12.1%	20.3%	40.0%	62.3%	79.8%	90.6%	96.0%	98.4%	99.4%	99.8%	99.9%	100.0%
Market Penetration	0.9%	12.5%	29.3%	54.6%	77.7%	91.0%	96.7%	98.8%	99.6%	99.9%	100.0%	100.0%



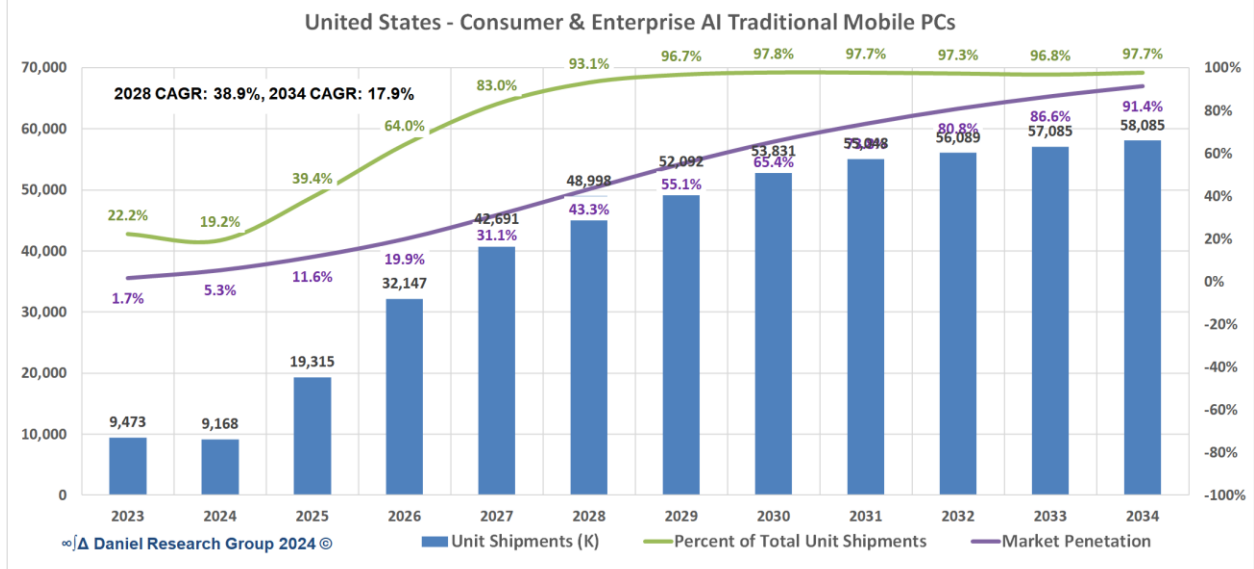
Convertible Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	131	406	1,104	2,725	5,472	8,548	10,941	12,561	13,763	14,806	15,816	16,847
AGR		210%	172%	147%	101%	56%	28%	15%	10%	8%	7%	7%
Percent of Total Unit Shipments	1.7%	4.5%	11.8%	27.0%	50.6%	74.0%	88.8%	95.6%	98.4%	99.4%	99.8%	99.9%
Market Penetration	0.5%	1.5%	4.2%	10.6%	22.2%	37.8%	54.6%	70.3%	78.4%	84.0%	88.4%	92.0%



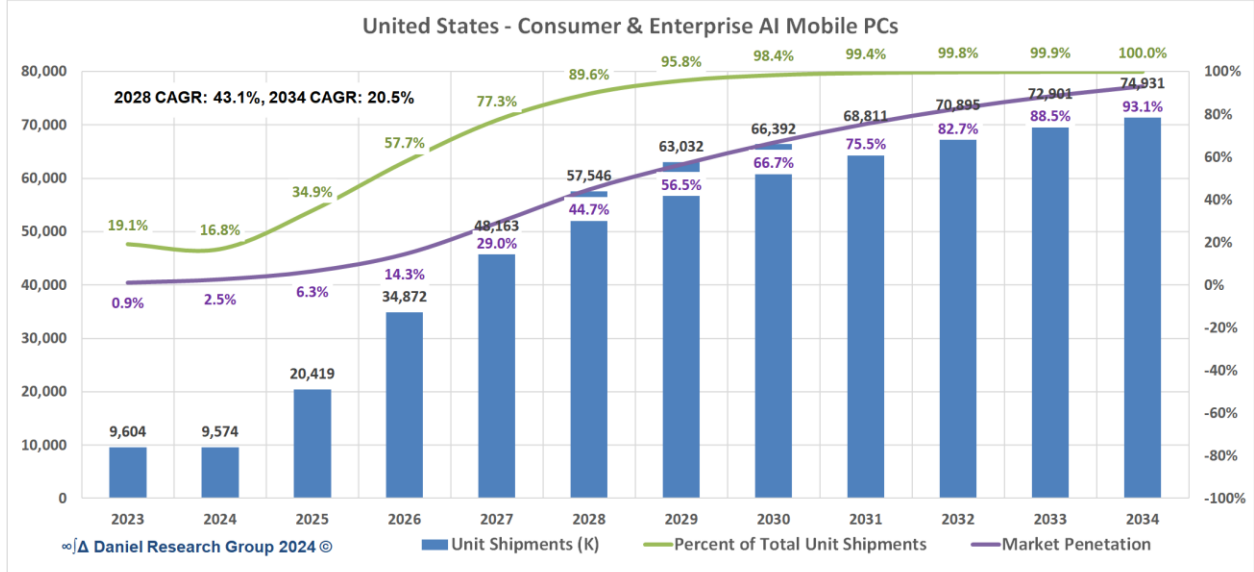
Traditional Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	9,473	9,168	19,315	32,147	42,691	48,998	52,092	53,831	55,048	56,089	57,085	58,085
AGR		-3%	111%	66%	33%	15%	6%	3%	2%	2%	2%	2%
Percent of Total Unit Shipments	22.2%	19.2%	39.4%	64.0%	83.0%	93.1%	96.7%	97.8%	97.7%	97.3%	96.8%	97.7%
Market Penetration	1.7%	5.3%	11.6%	19.9%	31.1%	43.3%	55.1%	65.4%	73.8%	80.8%	86.6%	91.4%



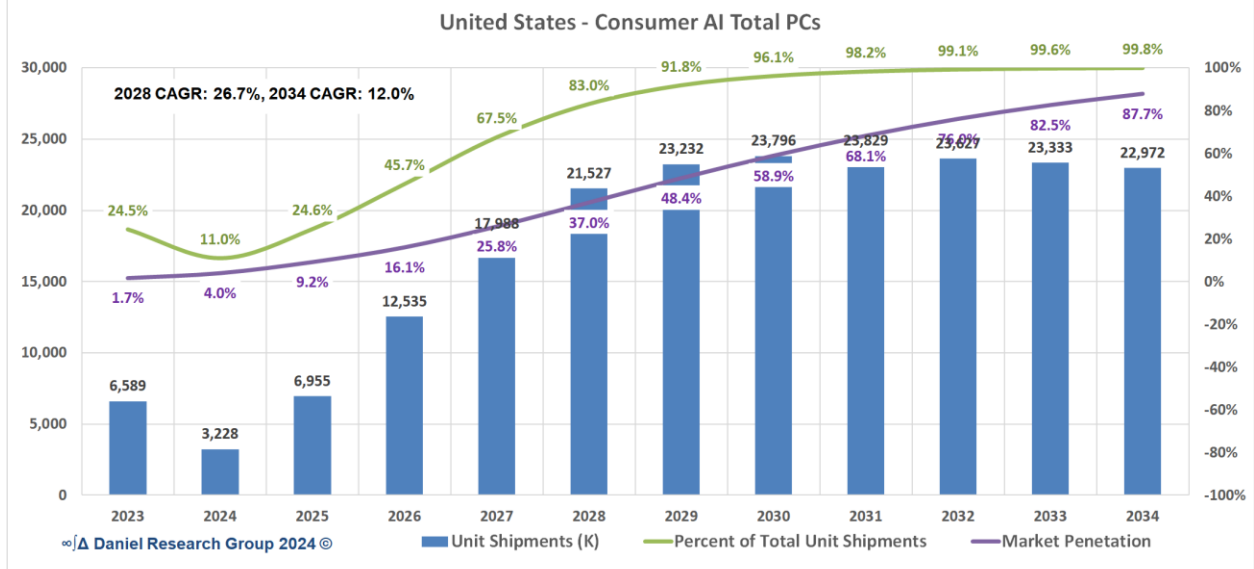
Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	9,604	9,574	20,419	34,872	48,163	57,546	63,032	66,392	68,811	70,895	72,901	74,931
AGR		0%	113%	71%	38%	19%	10%	5%	4%	3%	3%	3%
Percent of Total Unit Shipments	19.1%	16.8%	34.9%	57.7%	77.3%	89.6%	95.8%	98.4%	99.4%	99.8%	99.9%	100.0%
Market Penetration	0.9%	2.5%	6.3%	14.3%	29.0%	44.7%	56.5%	66.7%	75.5%	82.7%	88.5%	93.1%



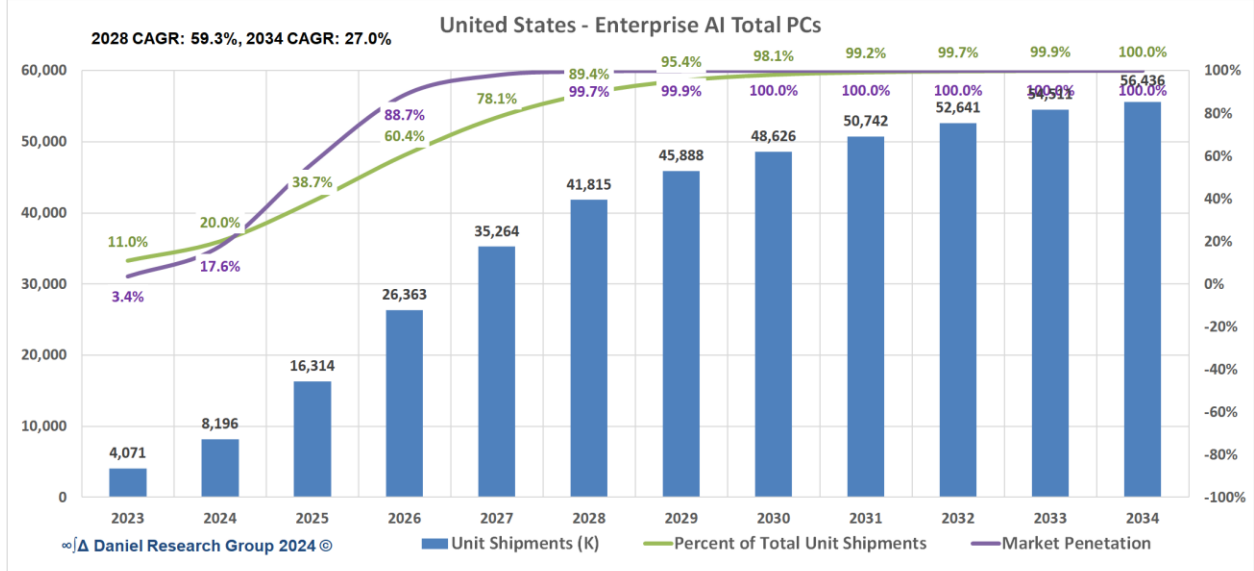
Total PCs (Desktops and Mobile PCs) Consumer

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	6,589	3,228	6,955	12,535	17,988	21,527	23,232	23,796	23,829	23,627	23,333	22,972
AGR		-51%	115%	80%	44%	20%	8%	2%	0%	-1%	-1%	-2%
Percent of Total Unit Shipments	24.5%	11.0%	24.6%	45.7%	67.5%	83.0%	91.8%	96.1%	98.2%	99.1%	99.6%	99.8%
Market Penetration	1.7%	4.0%	9.2%	16.1%	25.8%	37.0%	48.4%	58.9%	68.1%	76.0%	82.5%	87.7%



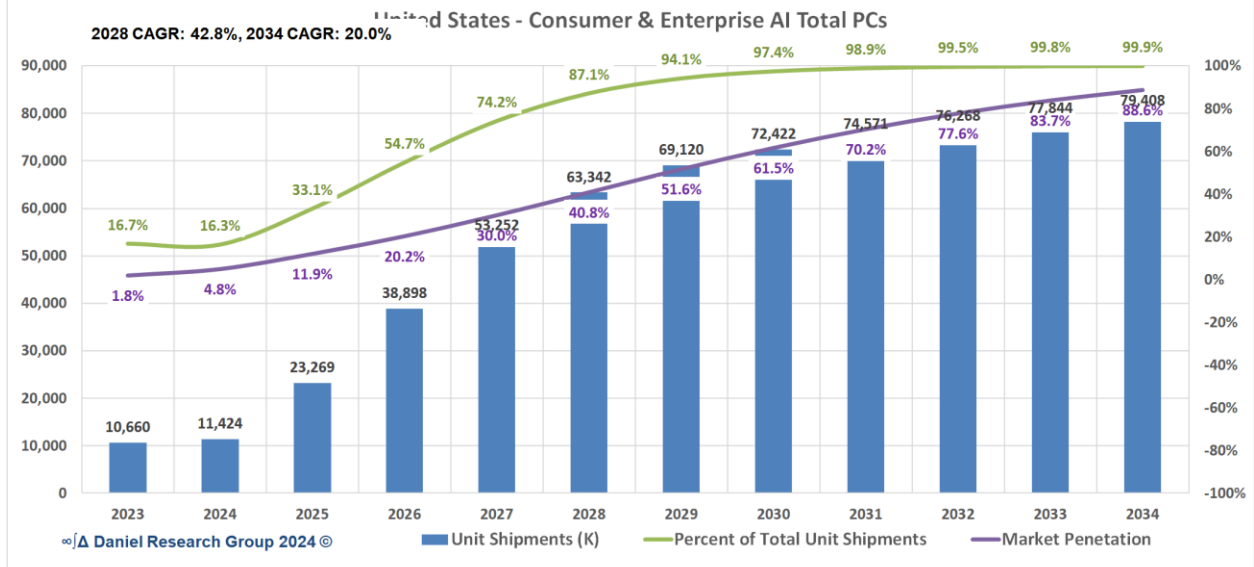
Enterprise

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	4,071	8,196	16,314	26,363	35,264	41,815	45,888	48,626	50,742	52,641	54,511	56,436
AGR		101%	99%	62%	34%	19%	10%	6%	4%	4%	4%	4%
Percent of Total Unit Shipments	11.0%	20.0%	38.7%	60.4%	78.1%	89.4%	95.4%	98.1%	99.2%	99.7%	99.9%	100.0%
Market Penetration	3.4%	17.6%	56.4%	88.7%	97.9%	99.7%	99.9%	100.0%	100.0%	100.0%	100.0%	100.0%



Total

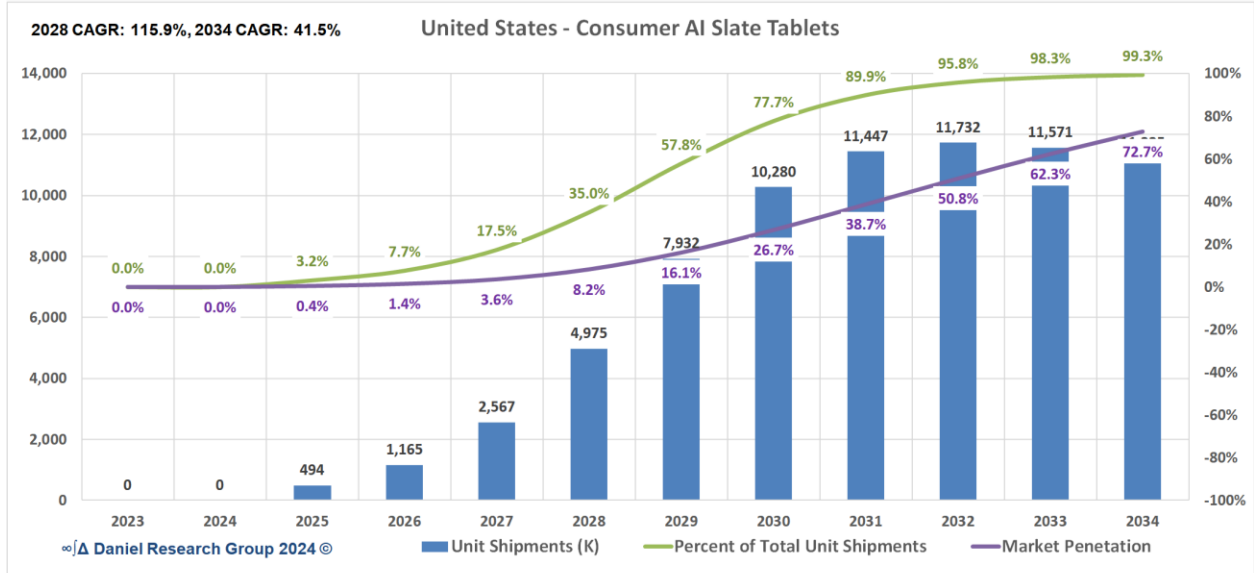
	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	10,660	11,424	23,269	38,898	53,252	63,342	69,120	72,422	74,571	76,268	77,844	79,408
AGR		7%	104%	67%	37%	19%	9%	5%	3%	2%	2%	2%
Percent of Total Unit Shipments	16.7%	16.3%	33.1%	54.7%	74.2%	87.1%	94.1%	97.4%	98.9%	99.5%	99.8%	99.9%
Market Penetration	1.8%	4.8%	11.9%	20.2%	30.0%	40.8%	51.6%	61.5%	70.2%	77.6%	83.7%	88.6%



Tablets

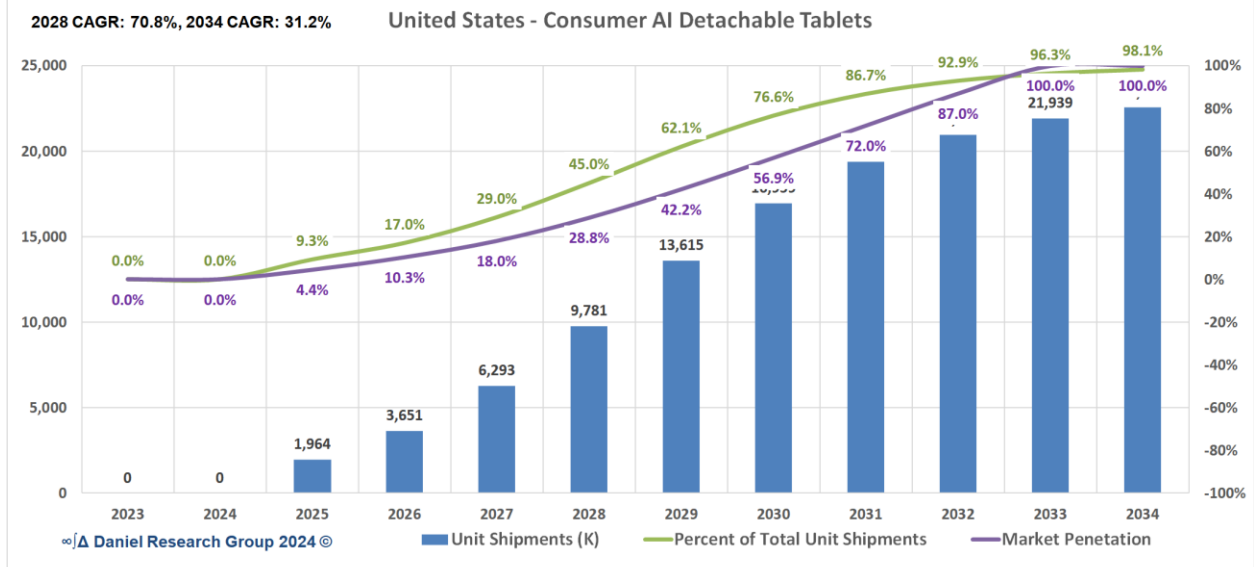
Consumer Slate

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)			494	1,165	2,567	4,975	7,932	10,280	11,447	11,732	11,571	11,225
AGR				136%	120%	94%	59%	30%	11%	2%	-1%	-3%
Percent of Total Unit Shipments			3.2%	7.7%	17.5%	35.0%	57.8%	77.7%	89.9%	95.8%	98.3%	99.3%
Market Penetration			0.4%	1.4%	3.6%	8.2%	16.1%	26.7%	38.7%	50.8%	62.3%	72.7%



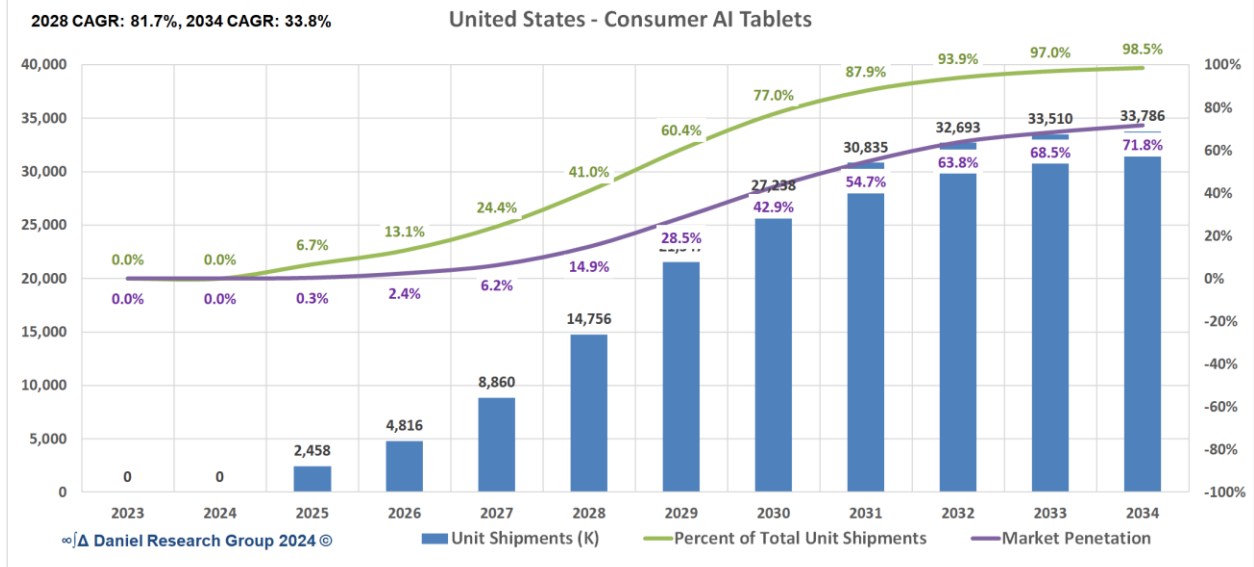
Consumer Detachable

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)			1,964	3,651	6,293	9,781	13,615	16,959	19,388	20,961	21,939	22,561
AGR				86%	72%	55%	39%	25%	14%	8%	5%	3%
Percent of Total Unit Shipments			9.3%	17.0%	29.0%	45.0%	62.1%	76.6%	86.7%	92.9%	96.3%	98.1%
Market Penetration			4.4%	10.3%	18.0%	28.8%	42.2%	56.9%	72.0%	87.0%	100.0%	100.0%



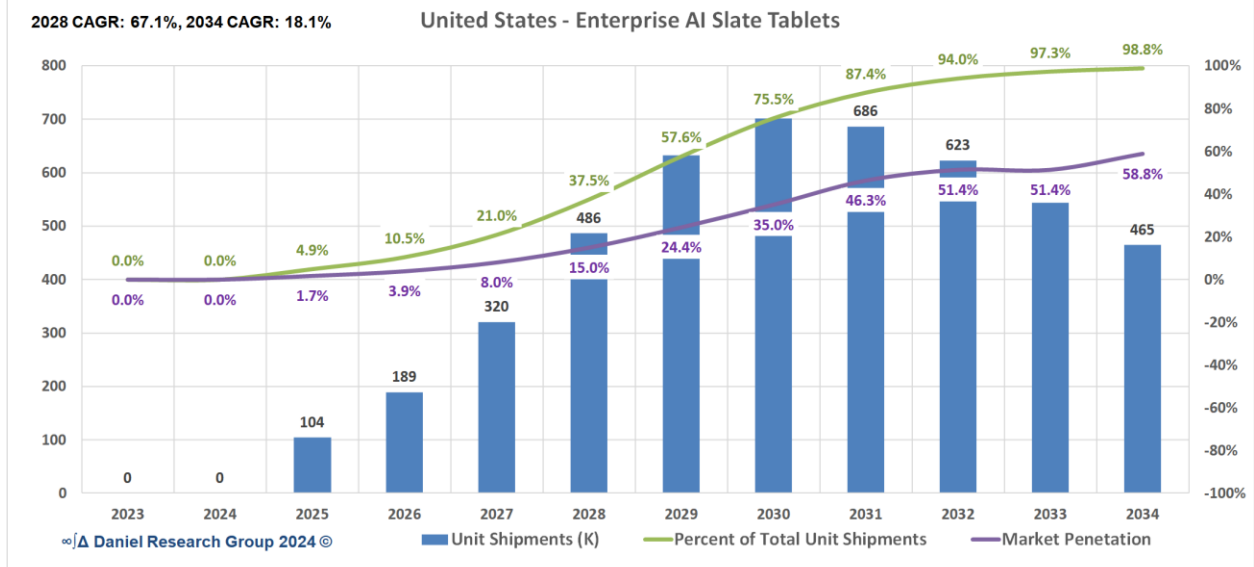
Consumer Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)			2,458	4,816	8,860	14,756	21,547	27,238	30,835	32,693	33,510	33,786
AGR				96%	84%	67%	46%	26%	13%	6%	2%	1%
Percent of Total Unit Shipments			6.7%	13.1%	24.4%	41.0%	60.4%	77.0%	87.9%	93.9%	97.0%	98.5%
Market Penetration			0.3%	2.4%	6.2%	14.9%	28.5%	42.9%	54.7%	63.8%	68.5%	71.8%



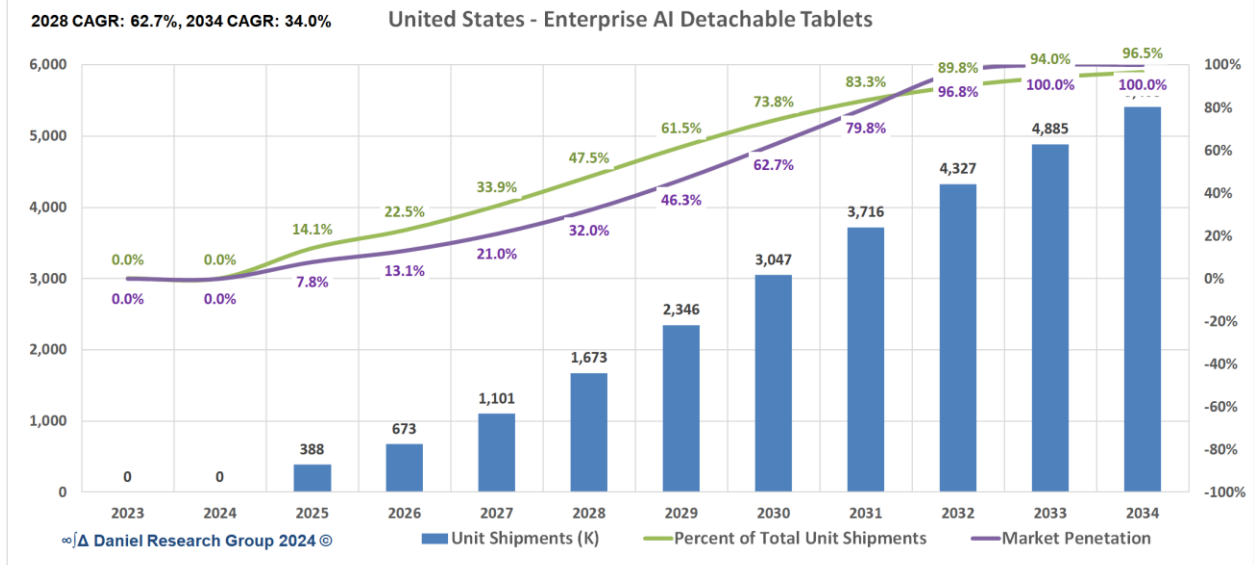
Enterprise Slate

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)			104	189	320	486	633	701	686	623	543	465
AGR				81%	70%	52%	30%	11%	-2%	-9%	-13%	-14%
Percent of Total Unit Shipments			4.9%	10.5%	21.0%	37.5%	57.6%	75.5%	87.4%	94.0%	97.3%	98.8%
Market Penetration			1.7%	3.9%	8.0%	15.0%	24.4%	35.0%	46.3%	51.4%	51.4%	58.8%



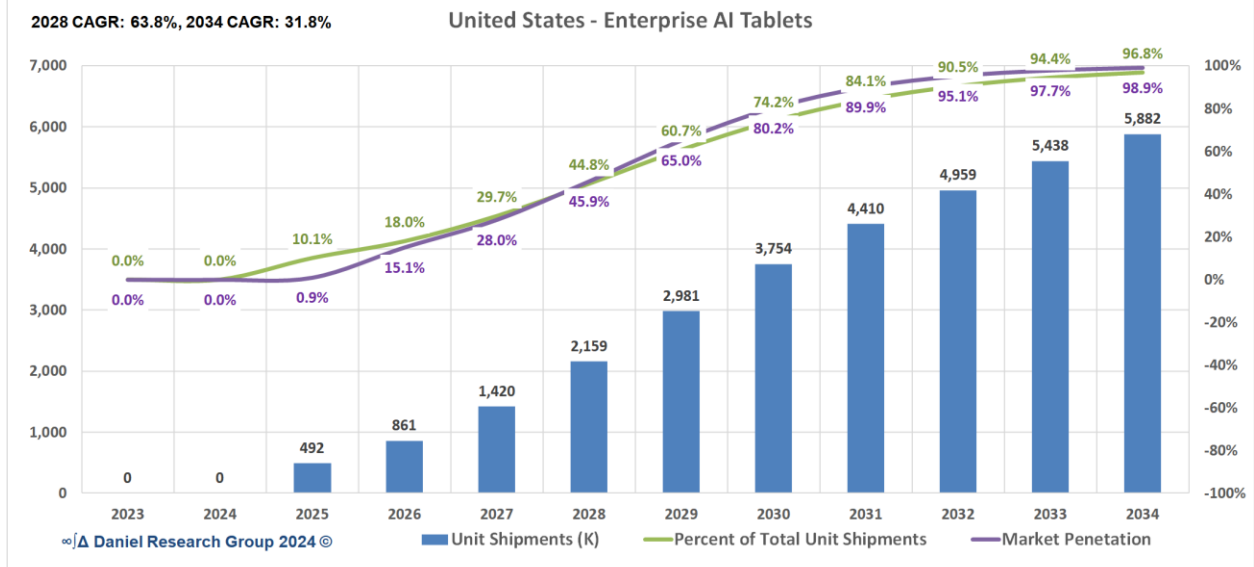
Enterprise Detachable

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)			388	673	1,101	1,673	2,346	3,047	3,716	4,327	4,885	5,408
AGR				73%	63%	52%	40%	30%	22%	16%	13%	11%
Percent of Total Unit Shipments			14.1%	22.5%	33.9%	47.5%	61.5%	73.8%	83.3%	89.8%	94.0%	96.5%
Market Penetration			7.8%	13.1%	21.0%	32.0%	46.3%	62.7%	79.8%	96.8%	100.0%	100.0%



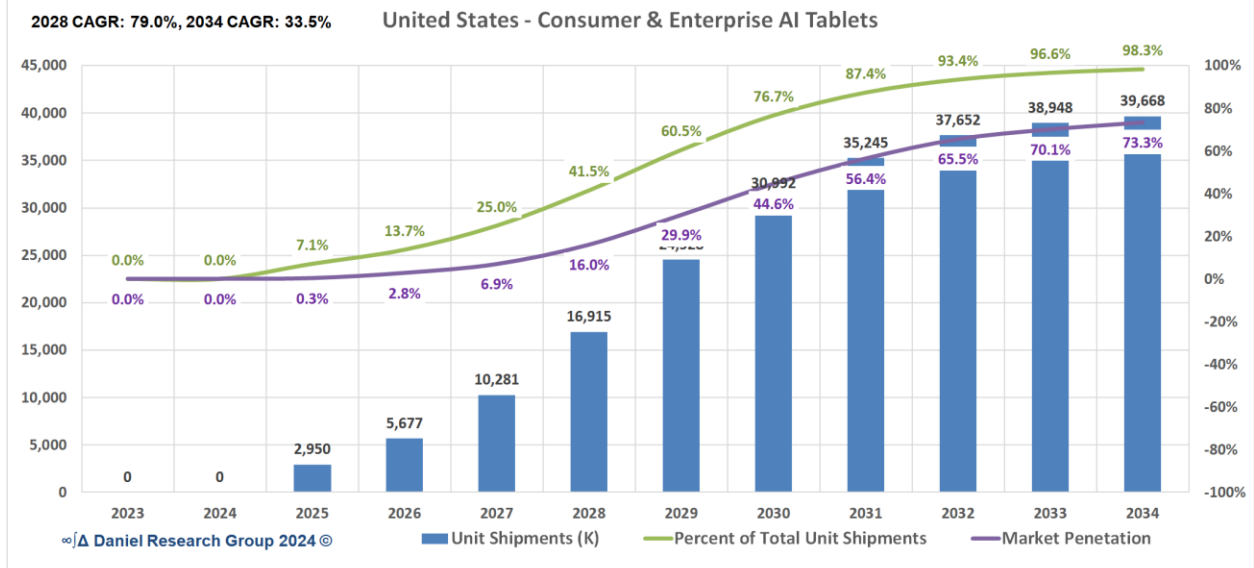
Enterprise Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)			492	861	1,420	2,159	2,981	3,754	4,410	4,959	5,438	5,882
AGR				75%	65%	52%	38%	26%	17%	12%	10%	8%
Percent of Total Unit Shipments			10.1%	18.0%	29.7%	44.8%	60.7%	74.2%	84.1%	90.5%	94.4%	96.8%
Market Penetration			0.9%	15.1%	28.0%	45.9%	65.0%	80.2%	89.9%	95.1%	97.7%	98.9%



Total

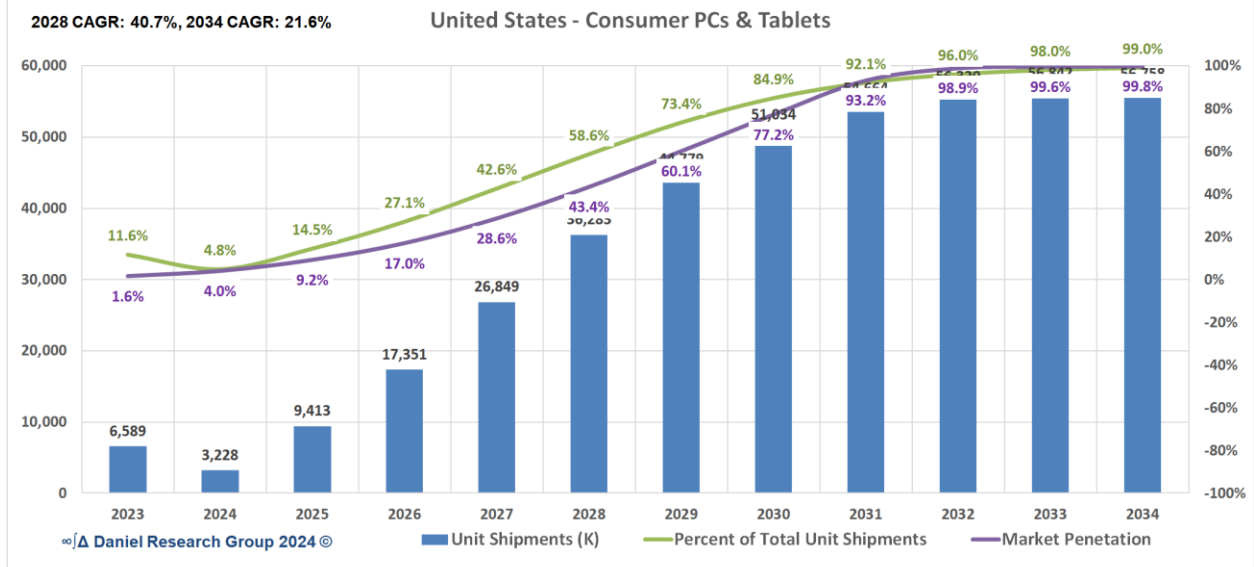
	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)			2,950	5,677	10,281	16,915	24,528	30,992	35,245	37,652	38,948	39,668
AGR				92%	81%	65%	45%	26%	14%	7%	3%	2%
Percent of Total Unit Shipments			7.1%	13.7%	25.0%	41.5%	60.5%	76.7%	87.4%	93.4%	96.6%	98.3%
Market Penetration			0.3%	2.8%	6.9%	16.0%	29.9%	44.6%	56.4%	65.5%	70.1%	73.3%



PCs and Tablets

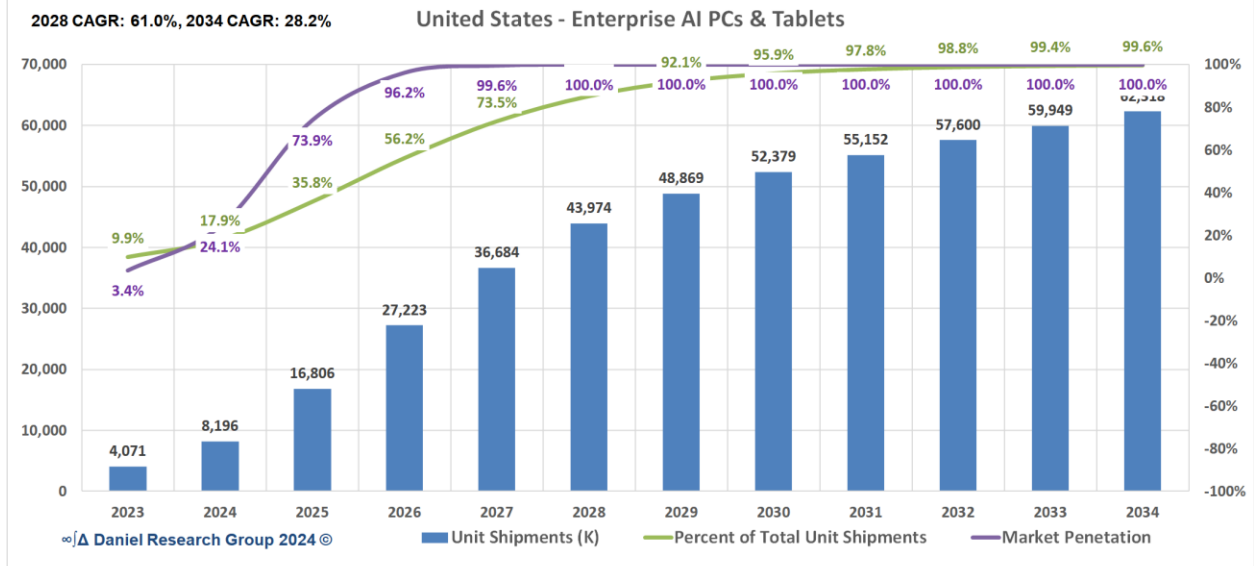
Consumer

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	6,589	3,228	9,413	17,351	26,849	36,283	44,779	51,034	54,664	56,320	56,842	56,758
AGR		-51%	192%	84%	55%	35%	23%	14%	7%	3%	1%	0%
Percent of Total Unit Shipments	11.6%	4.8%	14.5%	27.1%	42.6%	58.6%	73.4%	84.9%	92.1%	96.0%	98.0%	99.0%
Market Penetration	1.6%	4.0%	9.2%	17.0%	28.6%	43.4%	60.1%	77.2%	93.2%	98.9%	99.6%	99.8%



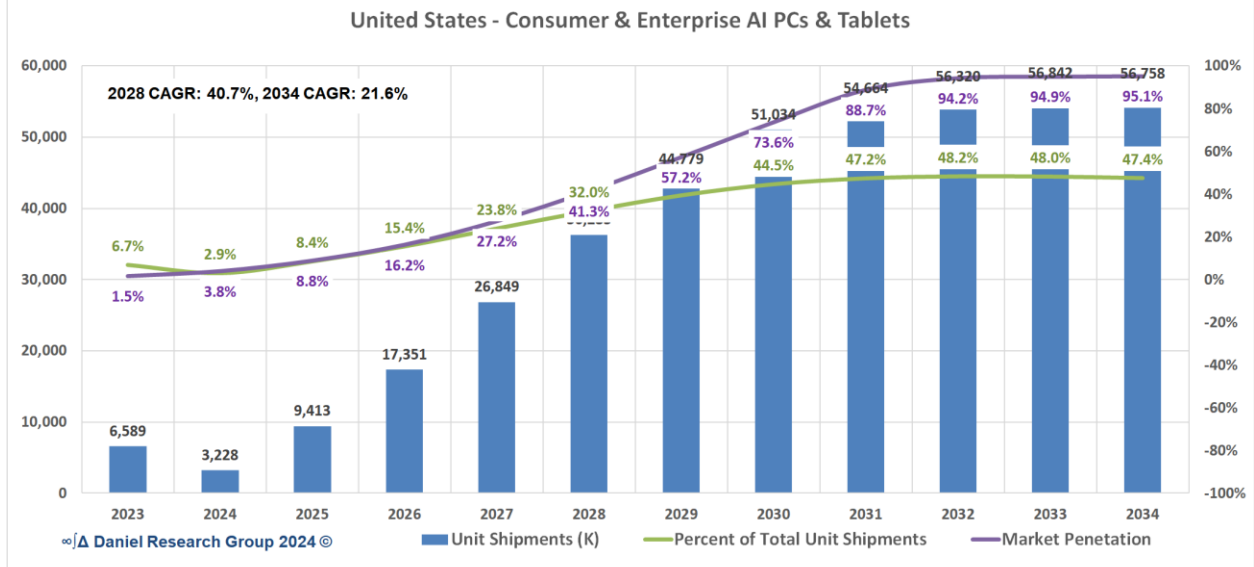
Enterprise

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	4,071	8,196	16,806	27,223	36,684	43,974	48,869	52,379	55,152	57,600	59,949	62,318
AGR		101%	105%	62%	35%	20%	11%	7%	5%	4%	4%	4%
Percent of Total Unit Shipments	9.9%	17.9%	35.8%	56.2%	73.5%	85.2%	92.1%	95.9%	97.8%	98.8%	99.4%	99.6%
Market Penetration	3.4%	24.1%	73.9%	96.2%	99.6%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Total

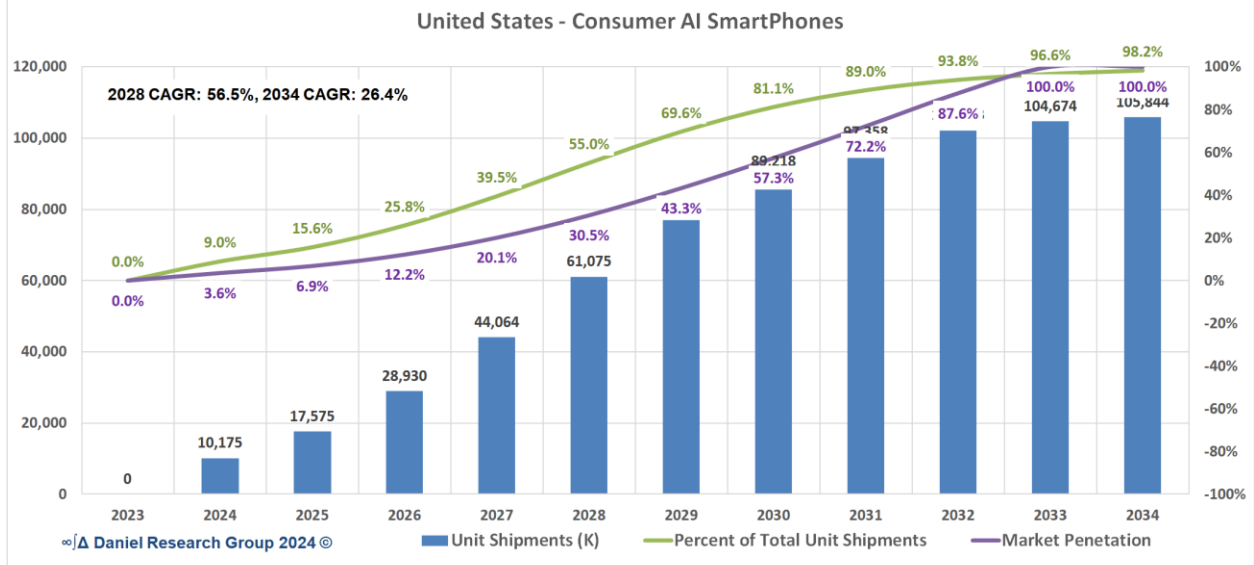
	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	6,589	3,228	9,413	17,351	26,849	36,283	44,779	51,034	54,664	56,320	56,842	56,758
AGR		-51%	192%	84%	55%	35%	23%	14%	7%	3%	1%	0%
Percent of Total Unit Shipments	6.7%	2.9%	8.4%	15.4%	23.8%	32.0%	39.3%	44.5%	47.2%	48.2%	48.0%	47.4%
Market Penetration	1.5%	3.8%	8.8%	16.2%	27.2%	41.3%	57.2%	73.6%	88.7%	94.2%	94.9%	95.1%



Smartphones

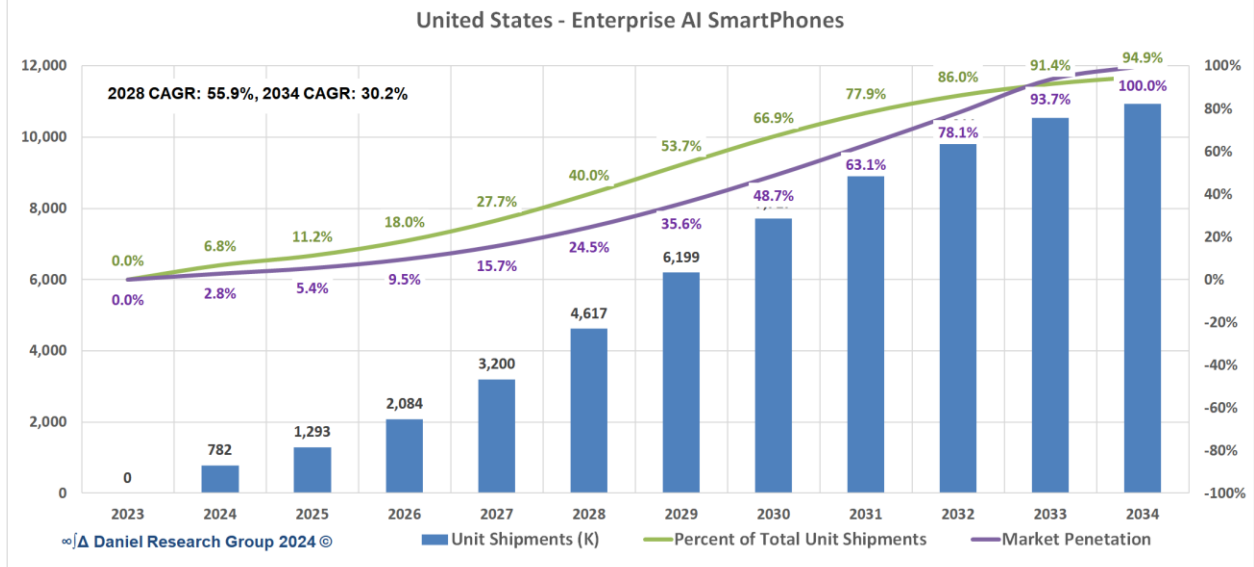
Consumer

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)		10,175	17,575	28,930	44,064	61,075	76,942	89,218	97,358	102,143	104,674	105,844
AGR			73%	65%	52%	39%	26%	16%	9%	5%	2%	1%
Percent of Total Unit Shipments		9.0%	15.6%	25.8%	39.5%	55.0%	69.6%	81.1%	89.0%	93.8%	96.6%	98.2%
Market Penetration		3.6%	6.9%	12.2%	20.1%	30.5%	43.3%	57.3%	72.2%	87.6%	100.0%	100.0%



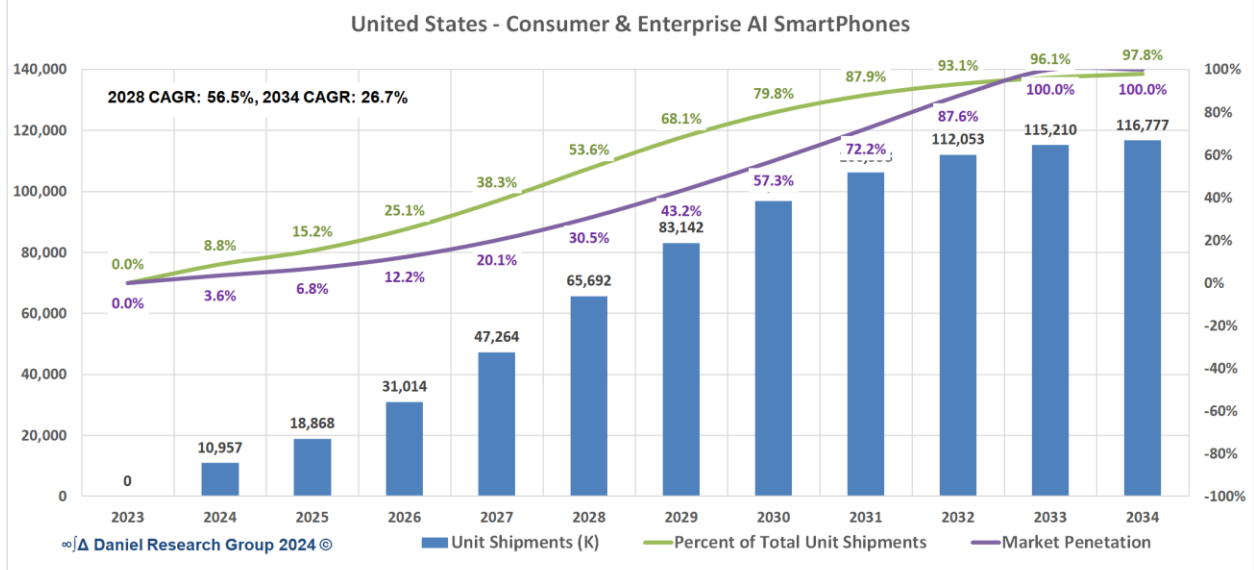
Enterprise

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)		782	1,293	2,084	3,200	4,617	6,199	7,717	8,980	9,911	10,537	10,932
AGR			65%	61%	54%	44%	34%	24%	16%	10%	6%	4%
Percent of Total Unit Shipments		6.8%	11.2%	18.0%	27.7%	40.0%	53.7%	66.9%	77.9%	86.0%	91.4%	94.9%
Market Penetration		2.8%	5.4%	9.5%	15.7%	24.5%	35.6%	48.7%	63.1%	78.1%	93.7%	100.0%



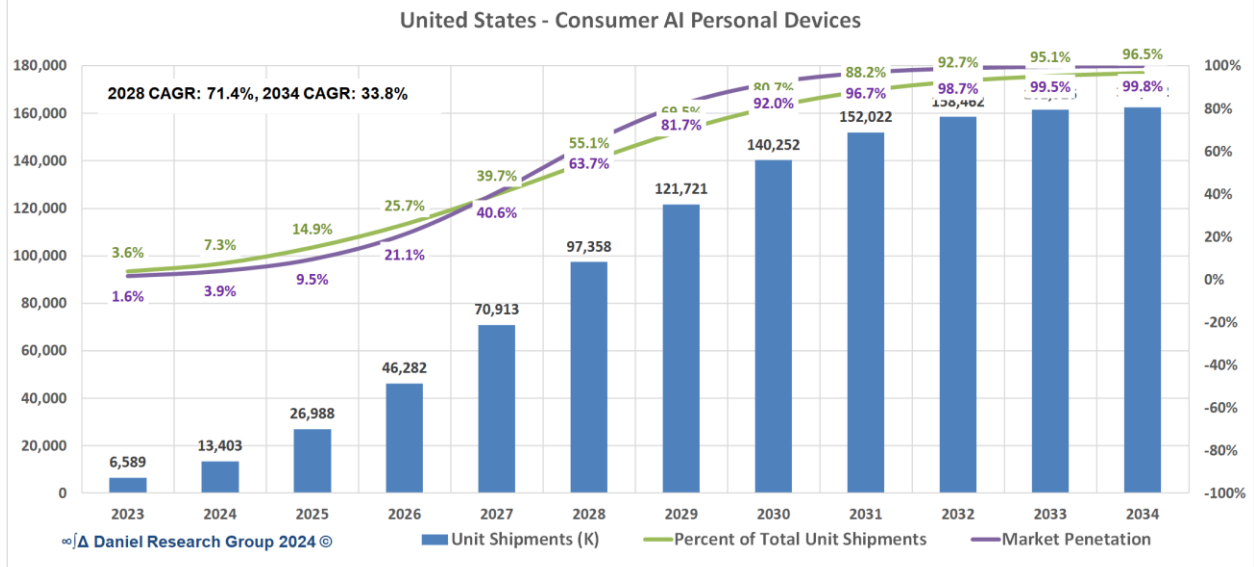
Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)		10,957	18,868	31,014	47,264	65,692	83,142	96,935	106,338	112,053	115,210	116,777
AGR			72%	64%	52%	39%	27%	17%	10%	5%	3%	1%
Percent of Total Unit Shipments		8.8%	15.2%	25.1%	38.3%	53.6%	68.1%	79.8%	87.9%	93.1%	96.1%	97.8%
Market Penetration		3.6%	6.8%	12.2%	20.1%	30.5%	43.2%	57.3%	72.2%	87.6%	100.0%	100.0%



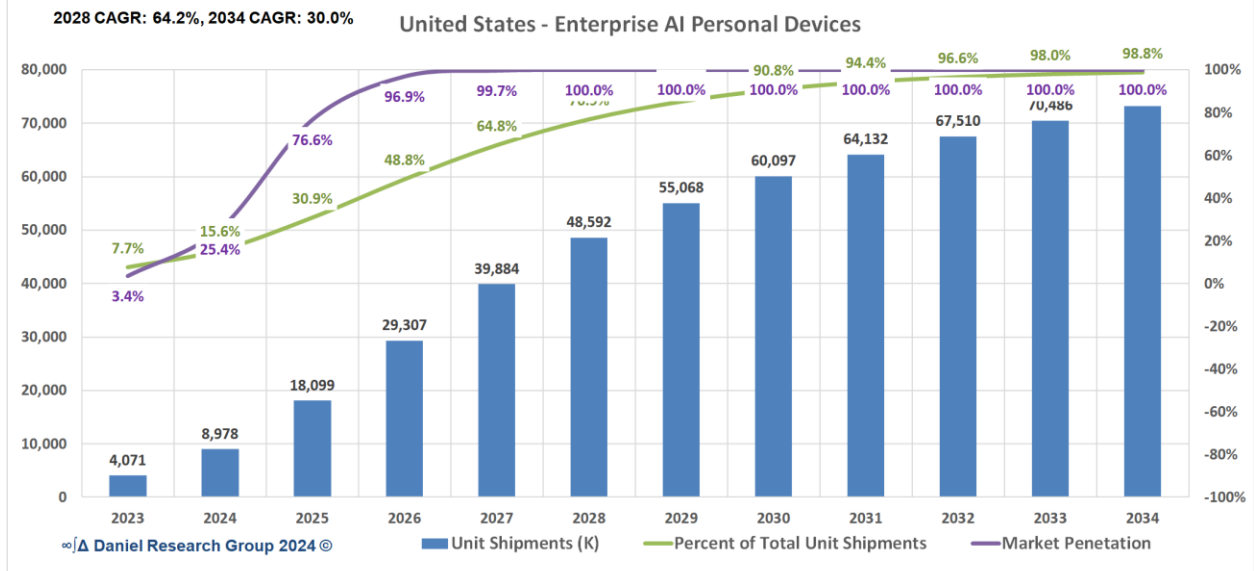
Total Personal Devices (PCs, Tablets, and Phones) Consumer

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	6,589	13,403	26,988	46,282	70,913	97,358	121,721	140,252	152,022	158,462	161,516	162,602
AGR		103%	101%	71%	53%	37%	25%	15%	8%	4%	2%	1%
Percent of Total Unit Shipments	3.6%	7.3%	14.9%	25.7%	39.7%	55.1%	69.5%	80.7%	88.2%	92.7%	95.1%	96.5%
Market Penetration	1.6%	3.9%	9.5%	21.1%	40.6%	63.7%	81.7%	92.0%	96.7%	98.7%	99.5%	99.8%



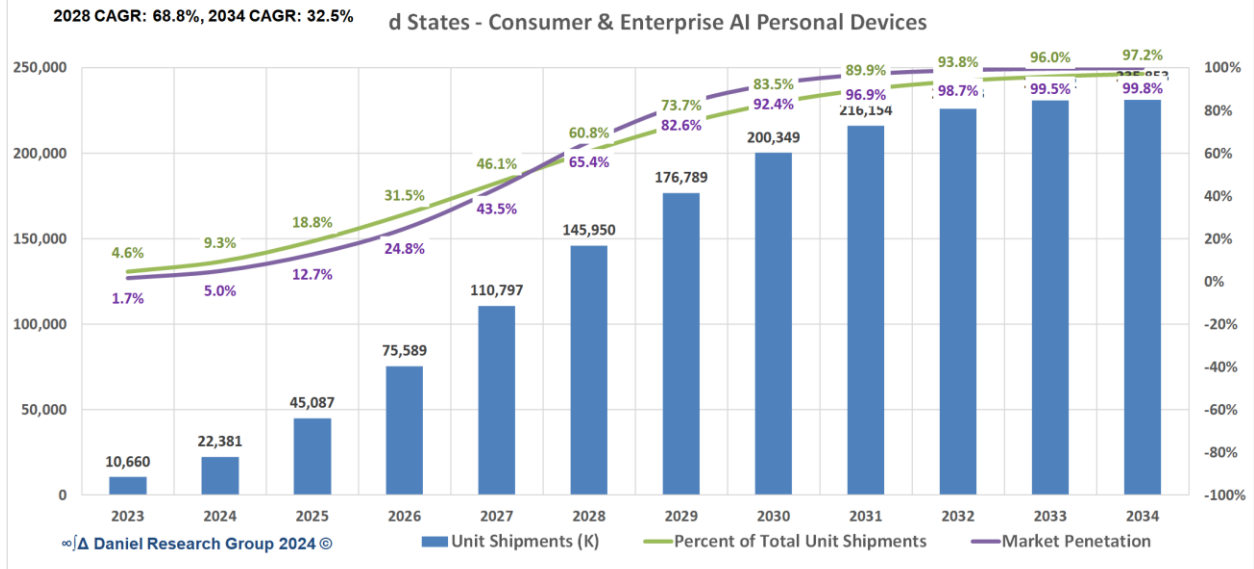
Enterprise

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	4,071	8,978	18,099	29,307	39,884	48,592	55,068	60,097	64,132	67,510	70,486	73,251
AGR		121%	102%	62%	36%	22%	13%	9%	7%	5%	4%	4%
Percent of Total Unit Shipments	7.7%	15.6%	30.9%	48.8%	64.8%	76.9%	85.2%	90.8%	94.4%	96.6%	98.0%	98.8%
Market Penetration	3.4%	25.4%	76.6%	96.9%	99.7%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Total

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Unit Shipments (K)	10,660	22,381	45,087	75,589	110,797	145,950	176,789	200,349	216,154	225,973	232,002	235,853
AGR		110%	101%	68%	47%	32%	21%	13%	8%	5%	3%	2%
Percent of Total Unit Shipments	4.6%	9.3%	18.8%	31.5%	46.1%	60.8%	73.7%	83.5%	89.9%	93.8%	96.0%	97.2%
Market Penetration	1.7%	5.0%	12.7%	24.8%	43.5%	65.4%	82.6%	92.4%	96.9%	98.7%	99.5%	99.8%



About Daniel Research Group

Daniel Research Group is a market research and consulting firm primarily servicing technology clients. Our focus is developing custom market models and forecasts. We support clients three ways.

1. We work independently or collaboratively with the client's own analysts to **produce custom** technology product/service **market models and forecasts**.
2. We work collaboratively with the client's own analysts to **design and develop the modeling applications** that they will use to develop their own market models and forecasts.
3. We **train client's analysts** in the theory and practice of technology market modeling and forecasting.

Most of our work utilizes the inventory of proprietary methodologies and algorithms that we have developed over more than 35 years. We have built technology forecasting market models for many major technology vendors, market research firms, and industry organizations. While our core competency is forecasting, our subject experience covers the entire technology and technology-enabled product/service landscape. We also support our engagements with traditional qualitative and quantitative research, as well as tactical and strategic consulting services.

Stephen J. Daniel - President

With over four decades in the Information Technology Industry, Mr. Daniel has developed a unique blend of Market and Technology experience coupled with a deep understanding of Market Research Methodology. His primary strength is in understanding the decision-making context within which the results of his research will be applied. This is manifested by his ability to design and execute studies that precisely meet client objectives in a timely fashion and at reasonable costs.



Mr. Daniel received his BS in Finance from Northeastern University and earned an MBA in Quantitative Analysis from New York University. He is a member of the American Statistical Association, American Economic Association, The Market Research Association of America, the American Marketing Association, National Association for Business Economics, and the Qualitative Research Association of America.

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