Is the Tablet PC ready to penetrate the consumer market?

by Geoff Walker

The Tablet PC celebrated its third birthday a few months ago. I am frequently asked for my opinion on when the Tablet PC will enter the mainstream. By "mainstream", I think most of my questioners mean the consumer market. Although I'm very positive about the future of the Tablet PC in general, as evidenced by my article entitled "The Future of the Tablet PC" in the previous (#2) issue of the Touch Panel, I must that say I'm not very optimistic about the opportunity for the Tablet PC in the consumer market in the next couple of years.

While price is always somewhat of an issue due to the $150 average premium for convertible Tablet PC functionality (compared with a similarly equipped notebook), it isn't the main problem. The real stumbling block is the lack of pen-enabled consumer software that can drive the product into consumers' hands. Application software is what's keeping the Tablet PC out of the mainstream today, not price.

Consumers aren't very interested in annotating documents, taking notes or collaborating – all of which are among the most significant Tablet PC applications in enterprise today. Students, by the way, are a special case of consumers. They are typically very interested in annotating documents, taking notes and collaborating. In that sense, students are like a subset of enterprise users, so the Tablet PC is a good fit for them. Consumers want to do a well-defined set of activities on their PCs (remember that the Tablet PC is fundamentally just a notebook PC with a pen). In the list of consumer PC activities below, I have given each activity a subjective "grade" (A through F), followed by a brief description of the added value that a Tablet PC can bring to the activity.

1. **Playing games: F**
   A few very simple 2D games are available for the Tablet PC, but there's nothing even close to the typical 3D games that consumers play today on desktop PCs. No major game developer has yet attempted to create a Tablet PC-specific game.

2. **Downloading and listening to music; burning CDs containing music: F**
   None of the existing consumer programs that support these activities are enhanced for use with the pen, however, it's not obvious that the pen can add much value to these activities.

3. **Browsing the web: A**
   The pen adds substantial value in this activity. The pen is a more ergonomic pointer than a mouse, and it can also be used to handwrite URLs. Microsoft's Snip-It utility provides a very convenient, pen-centric method of clipping portions of webpages that can be sent to others via email. Browsing the web on a Tablet PC is likely to improve even more in the future, with enhancements expected from both Microsoft and ISVs.

4. **Watching movies: F**
   Nothing in this activity is relevant to the Tablet PC. Even the slate form-factor into which all Tablet PCs can morph isn't very convenient for watching movies, since the Tablet PC must be propped up somehow. It seems unlikely that a consumer would watch a two-hour movie with the Tablet PC in their lap.

5. **Reading and writing mostly web-based (not client-based) email: D**
   It's possible to handwrite an email using RiteMail or Outlook, but it's really only practical for very short emails or emails containing sketches. From the recipient's point of view, receiving a handwritten email isn't exactly an advantage. However, the pen can add some value in this activity in the same way that it adds value to web-browsing.

6. **Doing instant messaging: C**
   Both Windows and MSN Messenger now support ink. However, outside of the Microsoft world (e.g., in AOL Instant Messenger), there is no support for ink.

7. **Performing simple productivity tasks such as storing recipes using Microsoft Works: D**
   While Microsoft Office is moderately well-enabled for ink, there is no ink support in Microsoft Works. The latter is more commonly used by consumers than the former.

8. **Reading e-books: B**
   It's considerably more convenient to use a pen instead of a keyboard or mouse while reading an e-book (although not as convenient as touch), particularly in relaxed positions such as on a couch or in bed. It's even possible to handwrite annotations while using the special Tablet PC version of MS Reader, although Reader supports only one of the several significant formats used in e-books.

9. **Organizing and editing digital photo collections: C**
   The pen can add significant value in advanced photo editing. For example, it's much easier to use a pen than a mouse when outlining an image in order to remove the image's background. However, at the simple "one-click-fix" level of most consumers, the pen doesn't add much value. The common need to create identification keywords ("tags") for each photo tends to pre-dispose users toward the keyboard.

10. **Publishing material on a personal website: F**
    The pen doesn't provide any clear added value in this activity.

11. **Creating and printing signs, labels, flyers, banners and other such items: D**
    None of the available consumer software for these activities has any support for digital ink – although the pen is easier to use than a mouse when performing simple graphics tasks.

12. **Publishing material on a personal blog (web log): D**
    There is a program available for creating handwritten blog entries, but it's really only useful for adding sketches or other such material. After all, why would anyone want to read a totally handwritten blog? The basic process of writing blog entries is unlikely to migrate away from the keyboard until voice recognition is fully ready for widespread consumer use (5-10 years, in the author's opinion).

13. **Doing the annual torture known as income taxes: F**
    This is another activity where the pen adds minimal value. Existing tax preparation software is entirely mouse-and-keyboard oriented.

14. **Keeping personal finances in order with Quicken: F**
    This is similar to the "taxes" activity, where the pen adds no significant value.

15. **Planning trips using Microsoft Streets & Trips or competitive software: C**
    In addition to acting as a mouse, the pen can be used to annotate maps or measure distances using Microsoft's Streets & Trips proprietary ink format. Eventually Microsoft will enhance this application for use with the Tablet PC's native digital ink – although that hasn't happened yet, and we're already into the fourth year.

16. **Using encyclopedias, dictionaries, atlases and other online & offline reference books: F**
    While the pen can be used as a mouse in this activity, digital ink for annotations is not supported by any of the relevant programs.

17. **Sketching (artistic consumers): D**
    There are several fairly good Tablet PC sketching programs targeted at graphics professionals and enterprise users, but there's nothing really appropriate for consumers with minimal artistic skills.

18. **Editing digital videos (advanced consumers): F**
    Today the pen adds little or no value in this activity.

Report Card:

A: 1
B: 1
C: 3
D: 5
F: 8

The overall average is a "D", or a grade-point average of 1.0. The bottom line is that today there simply isn't enough software and/or added value to motivate a consumer to buy a Tablet PC. Even if the premium for Tablet PC functionality dropped to zero, if additional consumer-oriented software doesn't become available, it's still questionable whether a consumer would purchase a Tablet PC over a standard notebook. Are the capabilities listed earlier worth somewhere between zero and $150 plus the cost of additional software such as a sketching program? It's not clear. What ¬is clear is that a "killer app" for the Tablet PC hasn't appeared yet, which means that a broad range of pen-enabled software will be required to drive the product into consumers' hands.

Many of the activities listed earlier rely on the added value of using the pen as a mouse. This isn't a major value element of the Tablet PC, since it's unrelated to digital ink and it's valuable only when a Tablet PC is in slate mode, i.e., when the user doesn't have access to a keyboard. In notebook mode, it's uncomfortable and tiring to hold the pen in midair while you try to tap or write on the notebook screen. Adding to this problem is the fact that the screen on most Tablet PCs moves annoyingly back and forth when pen pressure is applied.

The current status quo won't last forever. If enough ISVs become motivated to write pen-enabled software that (a) enhances the activities listed above, (b) is seen as having significant value by the consumer, (c) is priced appropriately for the consumer market, and (d) is marketed properly, then Tablet PCs could become a reasonably high-volume consumer product. Unfortunately, we are very far from that situation today. The answer to the question posed in the title is a clear "No!"

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