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The Death Of Mobile Is Coming! Smartphones Are Over! Apps Are Dead!

If you're reading the news, you've been seeing [stories](#) touting the [death](#) of mobile as we know it. Smartphones are so completely [over](#), according to these stories. In fact, those \$1,000 iPhones are already [obsolete](#).

How should you react?

Just as you do to the crazy guy on the street with the sign about the end of the world.

These stories are true, but they are irrelevant. What they say will happen is accurate, in many cases, but not imminent. And jumping too soon onto the next big thing is a sure way to drown in the rising tide of babble about [the next big wave](#).

Here's reality.

Smartphones are only [half-penetrated](#), globally, today. For under \$100 in many developing markets, they offer a relatively cheap on-ramp to the global digital ecosystem. For \$600-1,100, they offer the latest in digital technology for residents of rich countries.

Yes, augmented reality is coming. Yes, virtual reality is coming.

Yes, the locus of computing will move from our hands to our faces -- for some -- in the form of lightweight and stylish glasses. Intelligence will also spread around our bodies in various wearable forms. And intelligence will be ambient in our environments via conversational and possibly gestural user interfaces.

Eventually, if Kim Jong-un doesn't start a nuclear WWII and humanity continues to progress, we'll have direct brain-to-computer interfaces, [or neural laces](#), which Tesla's Elon Musk has formed a company to study and potentially develop.

But let's be realistic about the timing.

While North America might have [70% smartphone penetration](#) and Western Europe is in a similar range, South America, the Middle East, and Africa have huge room to grow, with penetration in the 20%, 30%, and 40% range. In Asia, China, Korea, and Japan have high rates of smartphone usage, but the Philippines is at 23.2%.

And the biggest country of all, with the most potential, is India, where smartphone ownership is still very low. [300 million Indians](#) have smartphones, but a billion more are still eagerly awaiting that privilege.

So there's plenty of global growth.

But surely augmented reality and virtual reality, smart glasses and visors, will shortly be ascendant in rich Western countries?

Think again.

The big three VR products -- HTC's Vive, Facebook's Oculus, and Sony's PSVR -- each cost around \$1,000, when all the components and necessities are included. If you need a new PC to drive your Vive or

Oculus, add that cost too. The hotly-awaited AR products -- Microsoft's HoloLens, Magic Leap, and a variety of other head-mounted lenses from Meta, Blippar, and others -- are not yet available commercially, and look like they'll cost similar amounts.

Eventually, the technology will shrink. Eventually, the price point will come down. Eventually, the capability will not just be demo wow, but also possess real-world depth and breadth. Eventually the product will be comfortable enough to not just use it for 10 or 20 minutes, but to wear it for 12 to 16 hours.

But those are significantly hard technical challenges.

That point is at least three to five years away, and it could easily be a decade away. And even at then, we have to start a whole new adoption cycle: rich early adopters in the wealthy countries first, followed by all the rest.

The world is getting more complex, and innovation in multiple areas -- bots and assistants, for one -- is most certainly attacking the smartphone-driven mobile ecosystem.

The end is coming. But it is not yet near.

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