



Exploring word trends in earnings calls

IPR Competitive Intelligence

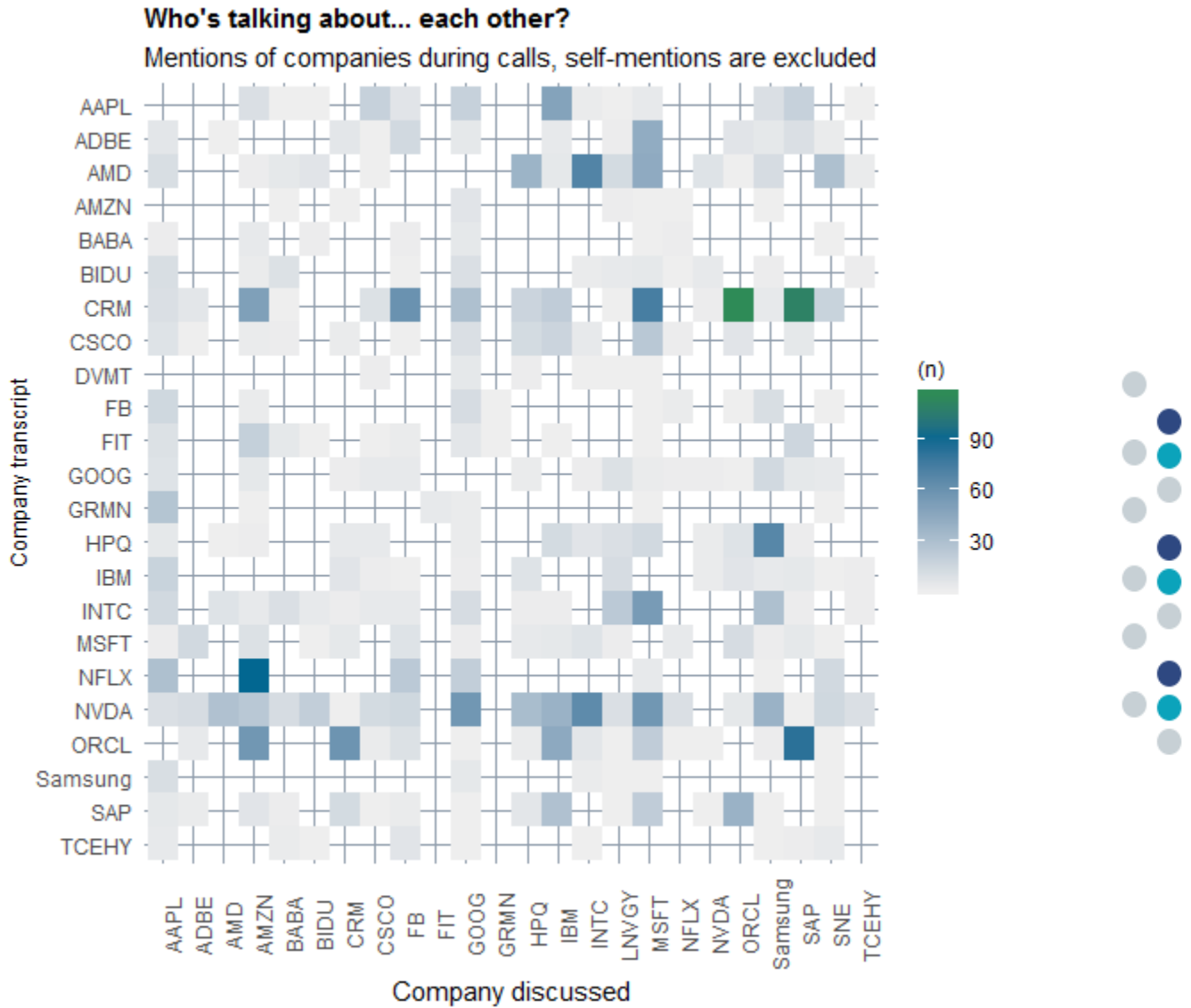
- Ryan Timpe
- July 30, 2018

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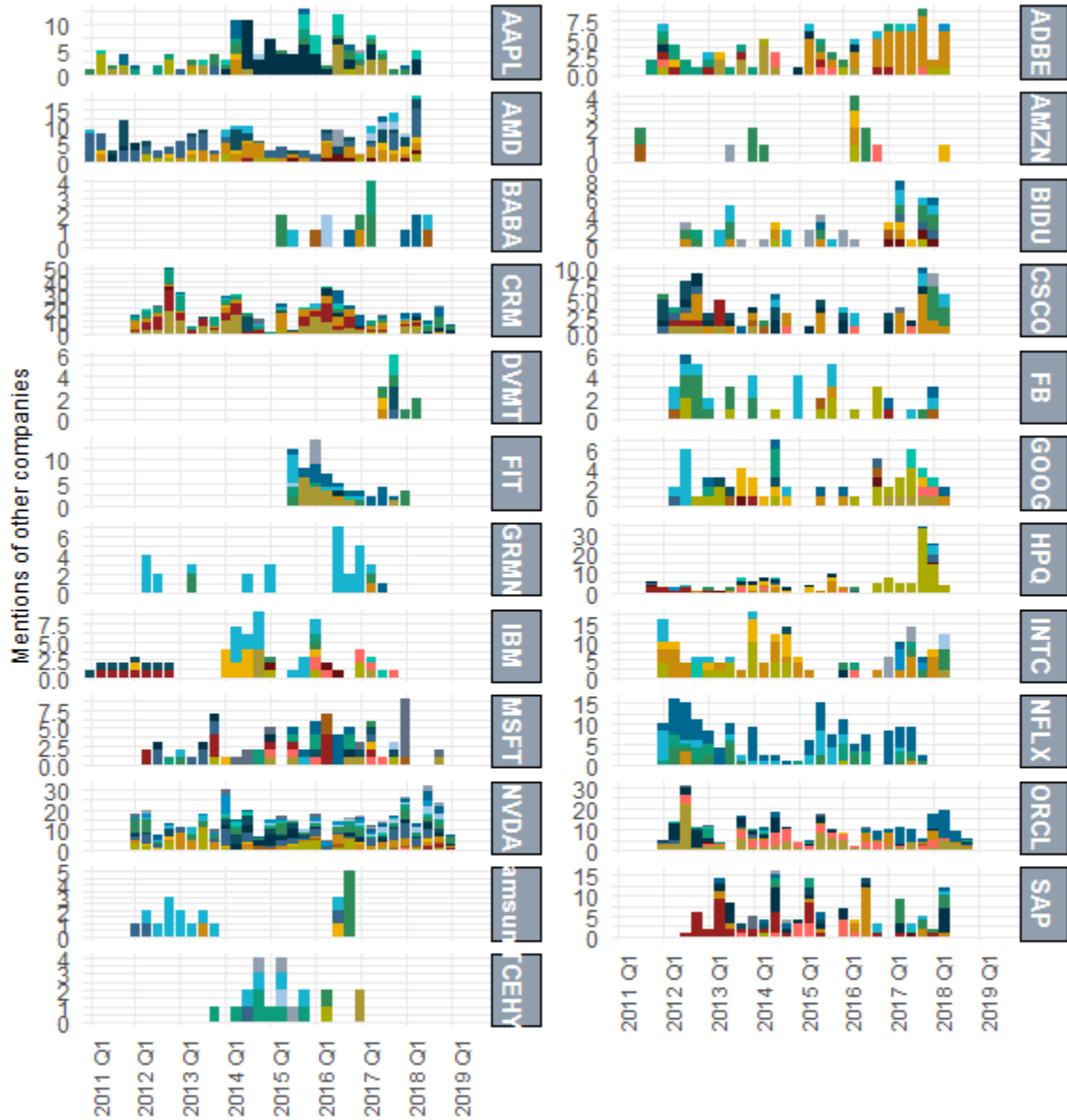
Companies discussing each other

How many times do companies discuss each other?

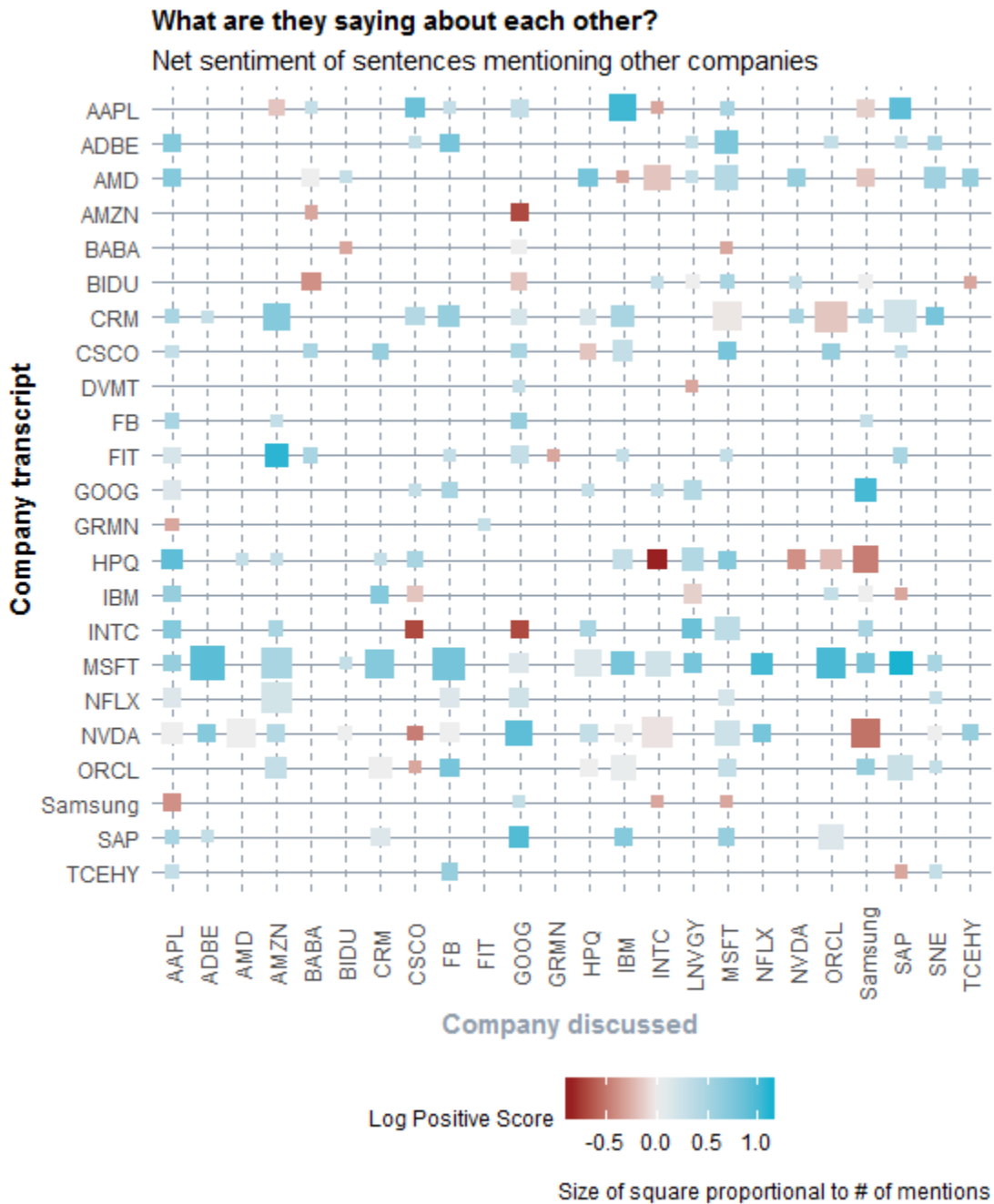


Who's talking about... each other?

Note: Y-axis scales differ between charts to highlight content



Are the companies saying positive or negative things about each other?



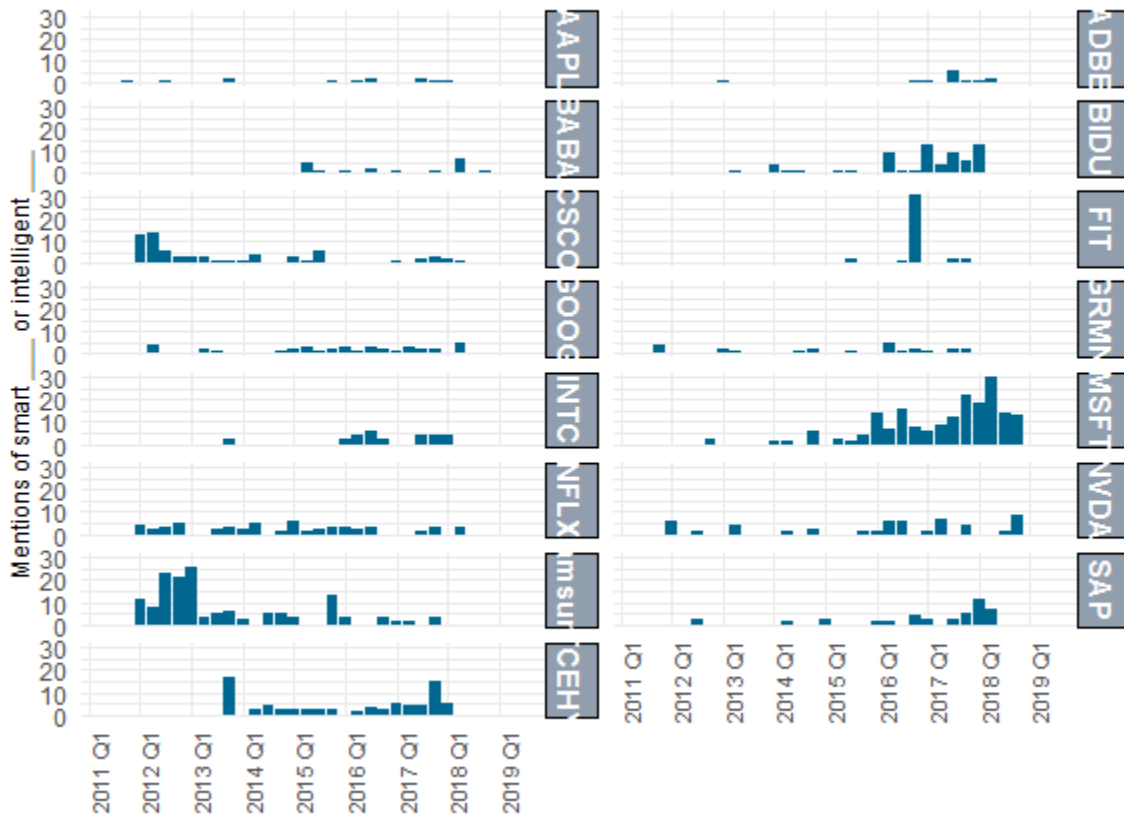
Uses of “smart” and “intelligent”

Top words prefixed by “smart” or “intelligent”



Who's talking about... smart X's and intelligent Y's?

Mentions of key phrases during earnings calls



Uses of “reality”

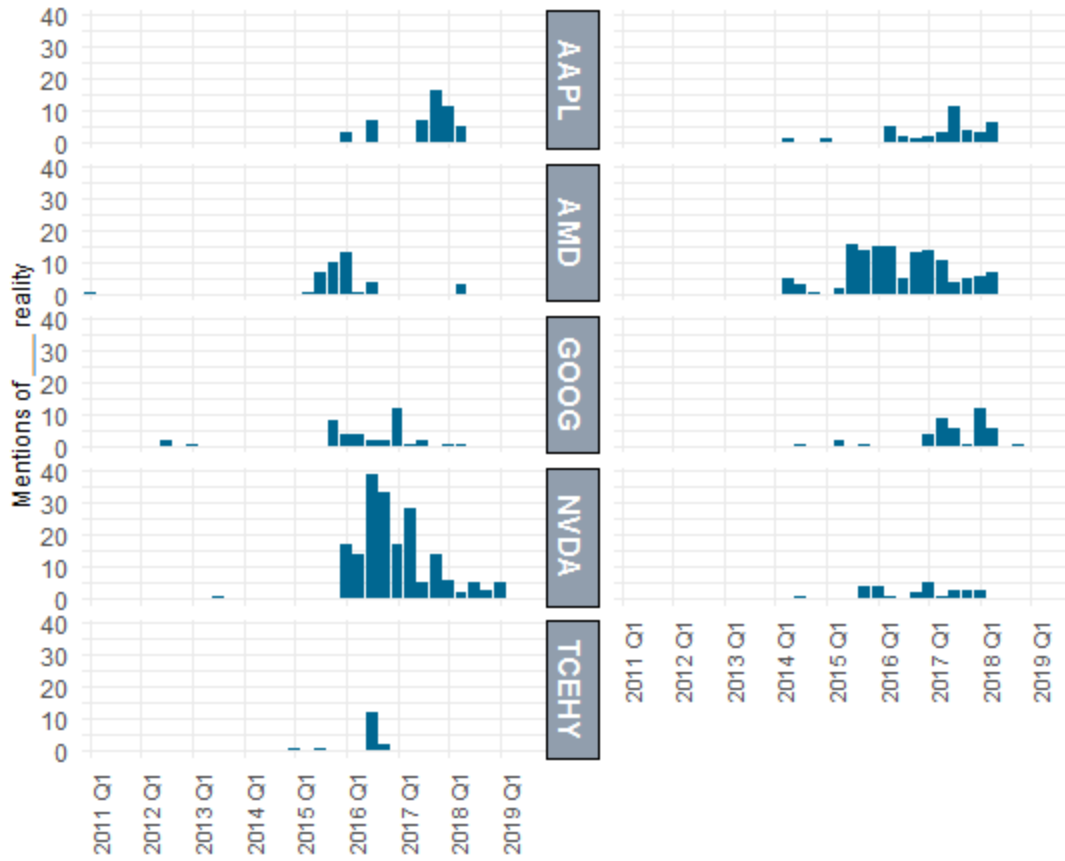
Top companies speaking about ____ reality

Company	augmented	mixed	virtual
AAPL	40	0	7
ADBE	15	0	23
AMD	4	0	35
BIDU	5	0	0
FB	46	0	88
FIT	4	0	0
GOOG	6	0	30
INTC	0	0	6
MSFT	0	35	5
NVDA	0	0	184
Samsung	6	0	21
TCEHY	10	0	4



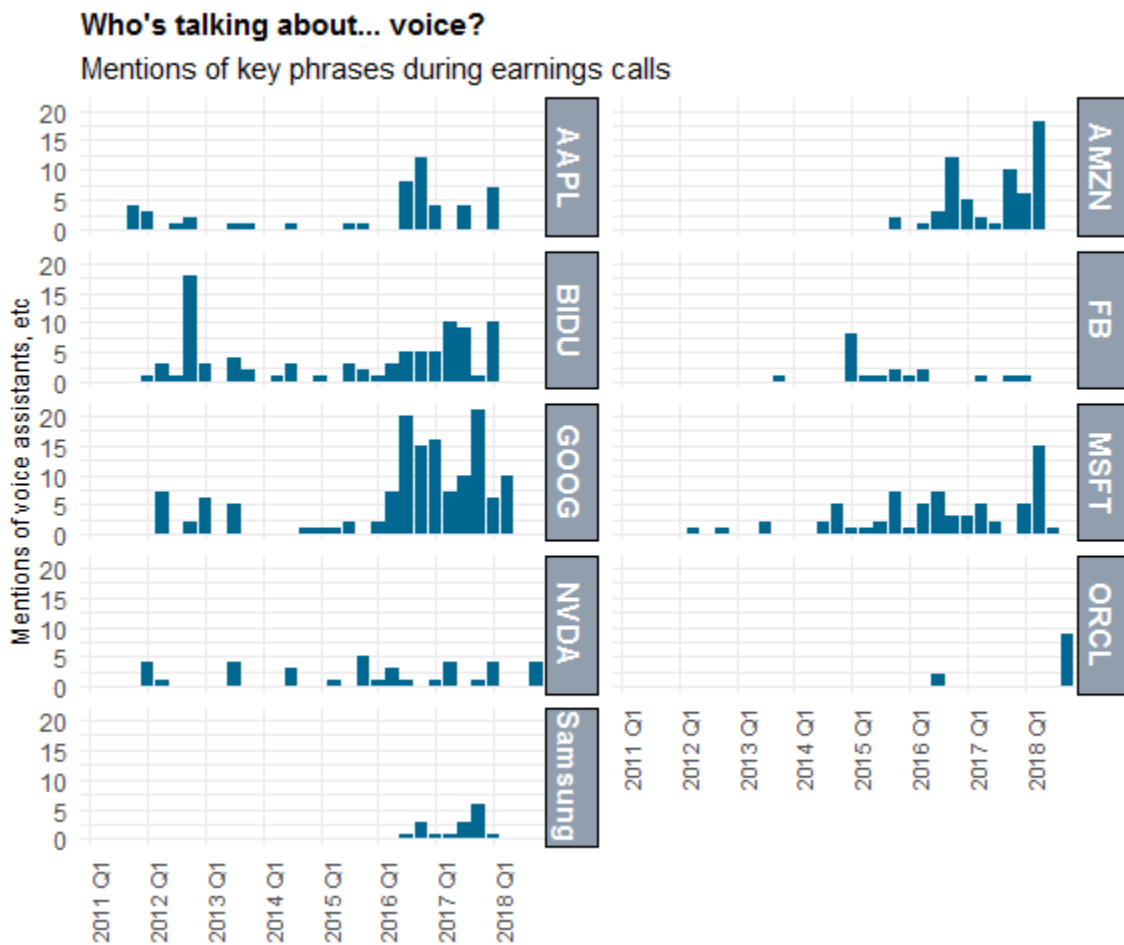
Who's talking about... reality?

Mentions of key phrases during earnings calls



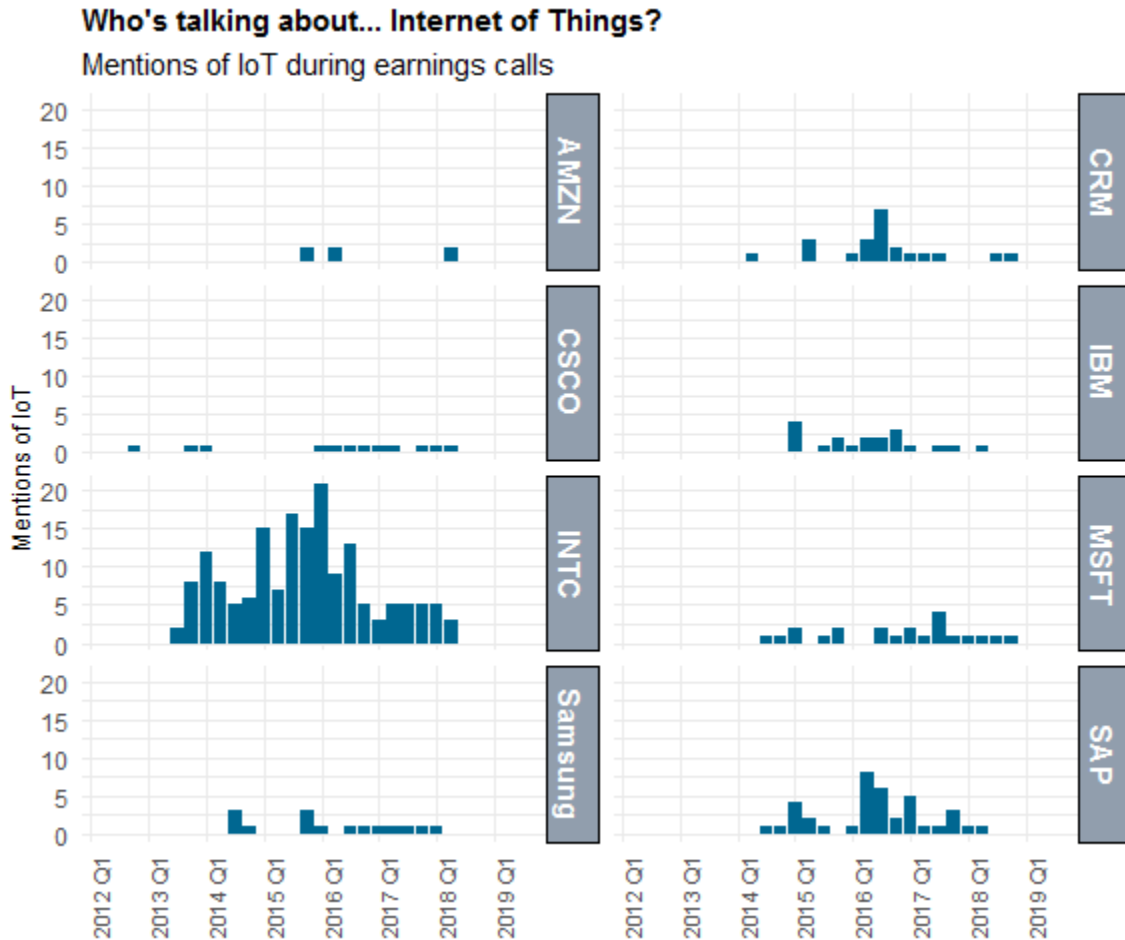
Discussions of voice assistants

Top words associated with voice assistants

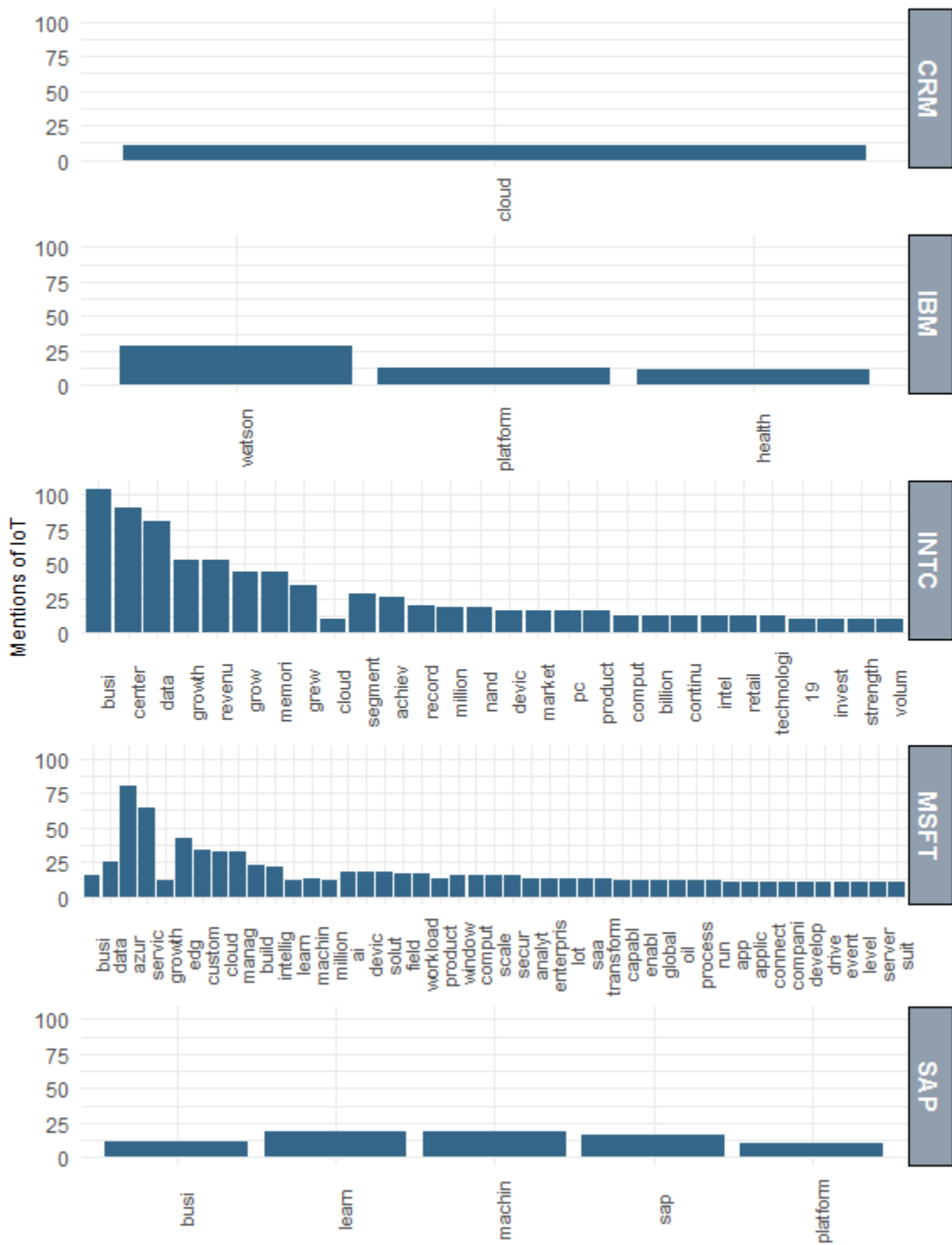


Uses of “Internet of Things”

Internet of Things (IoT) & Machine-to-machine (M2M)

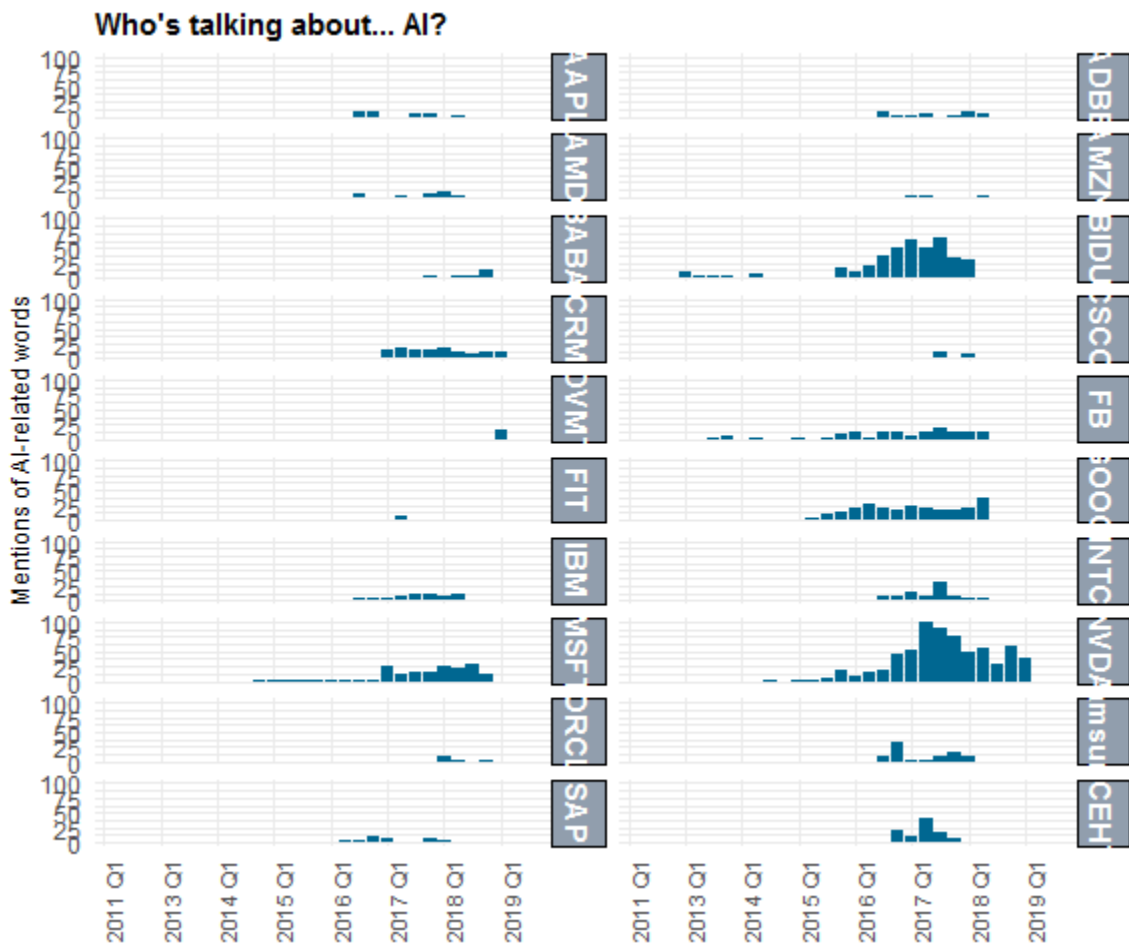


Words mentioned with Internet of Things



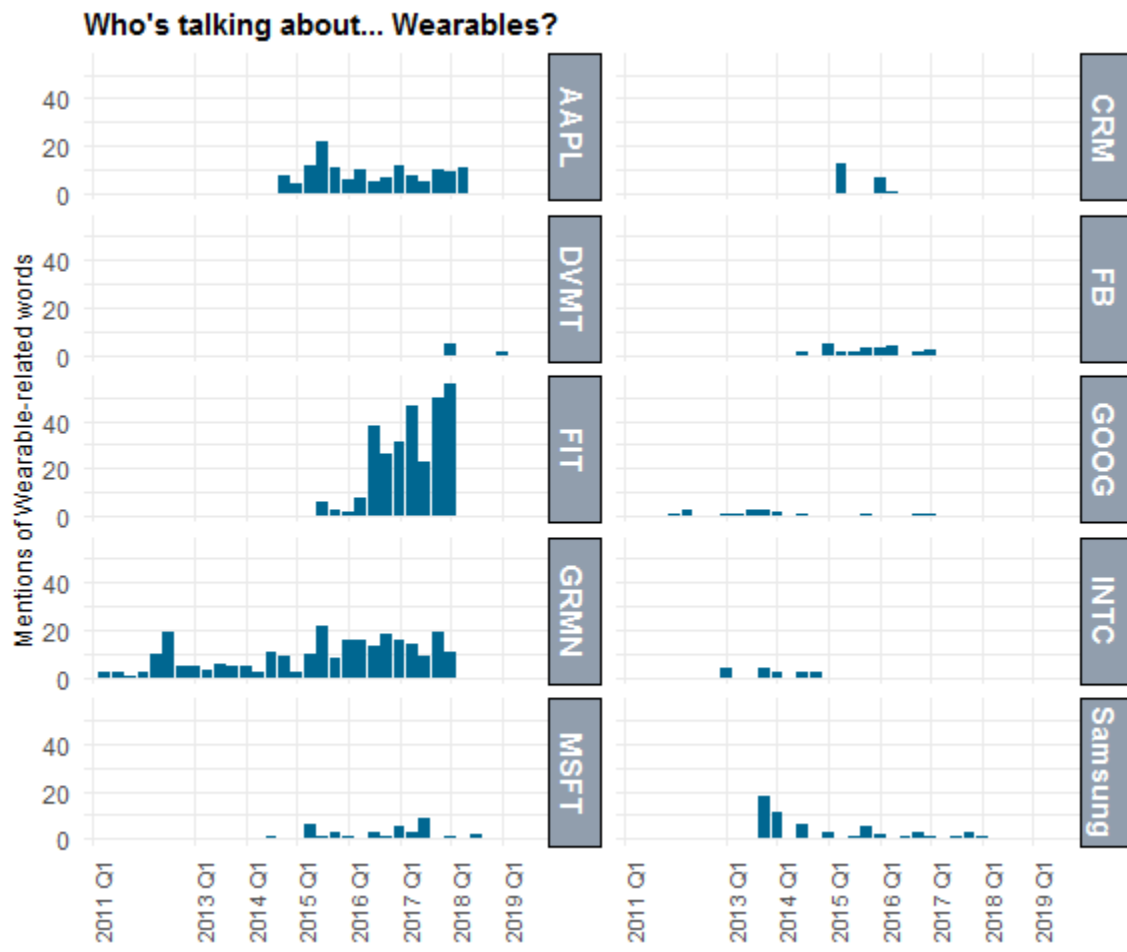
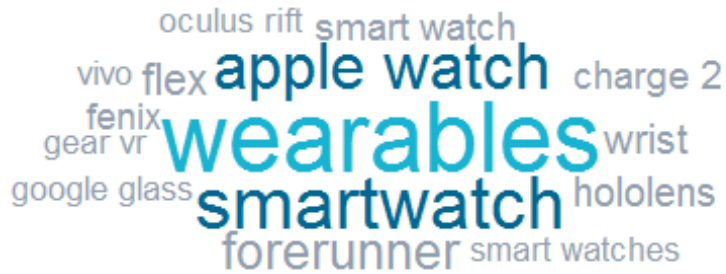
Uses of AI, Machine / deep learning

Top uses of ML, AI, Deep learning, bot, cognitive, NLP, Face recognition



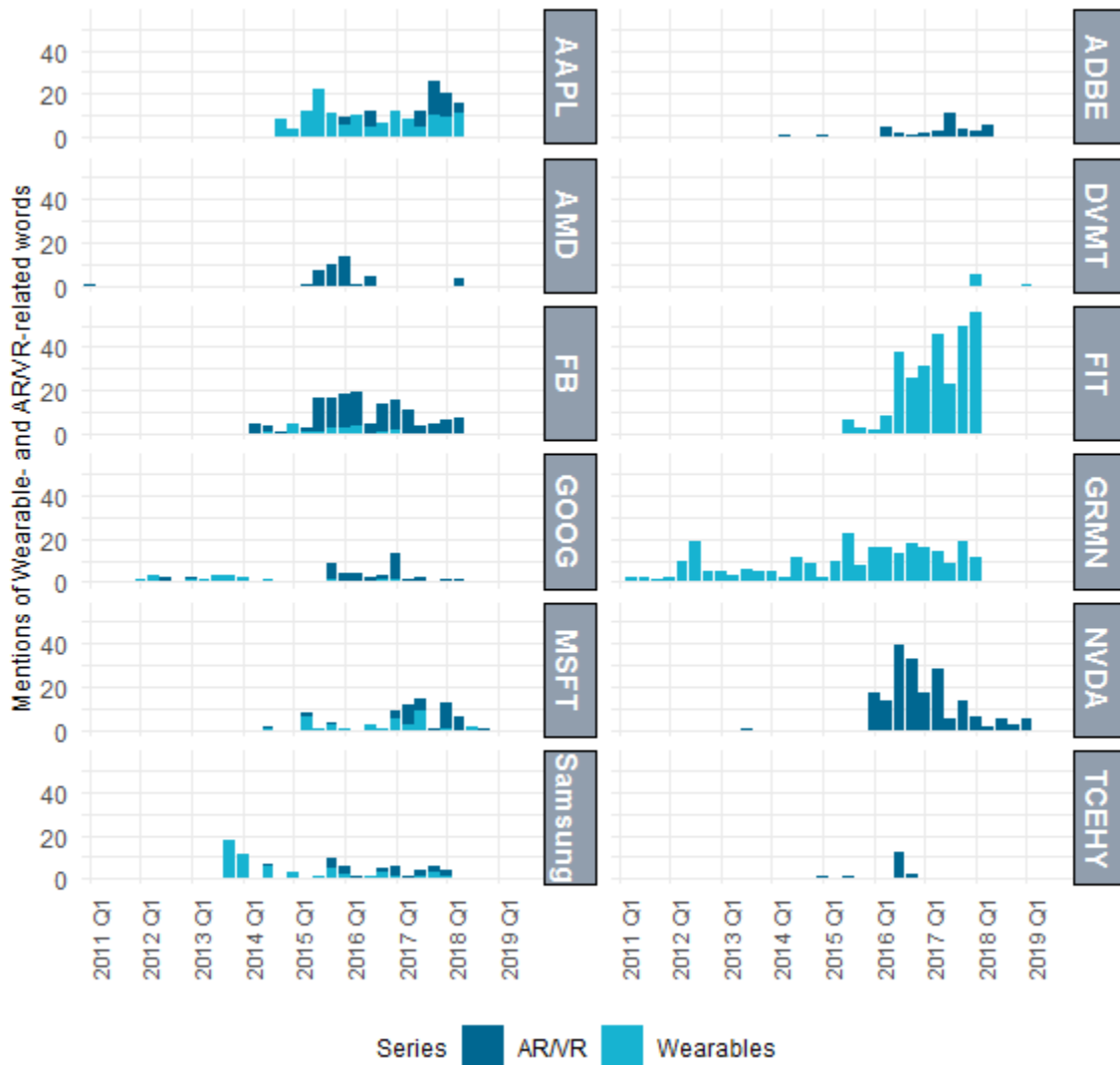
Discussions about wearable devices

Top uses of Wearable-related words



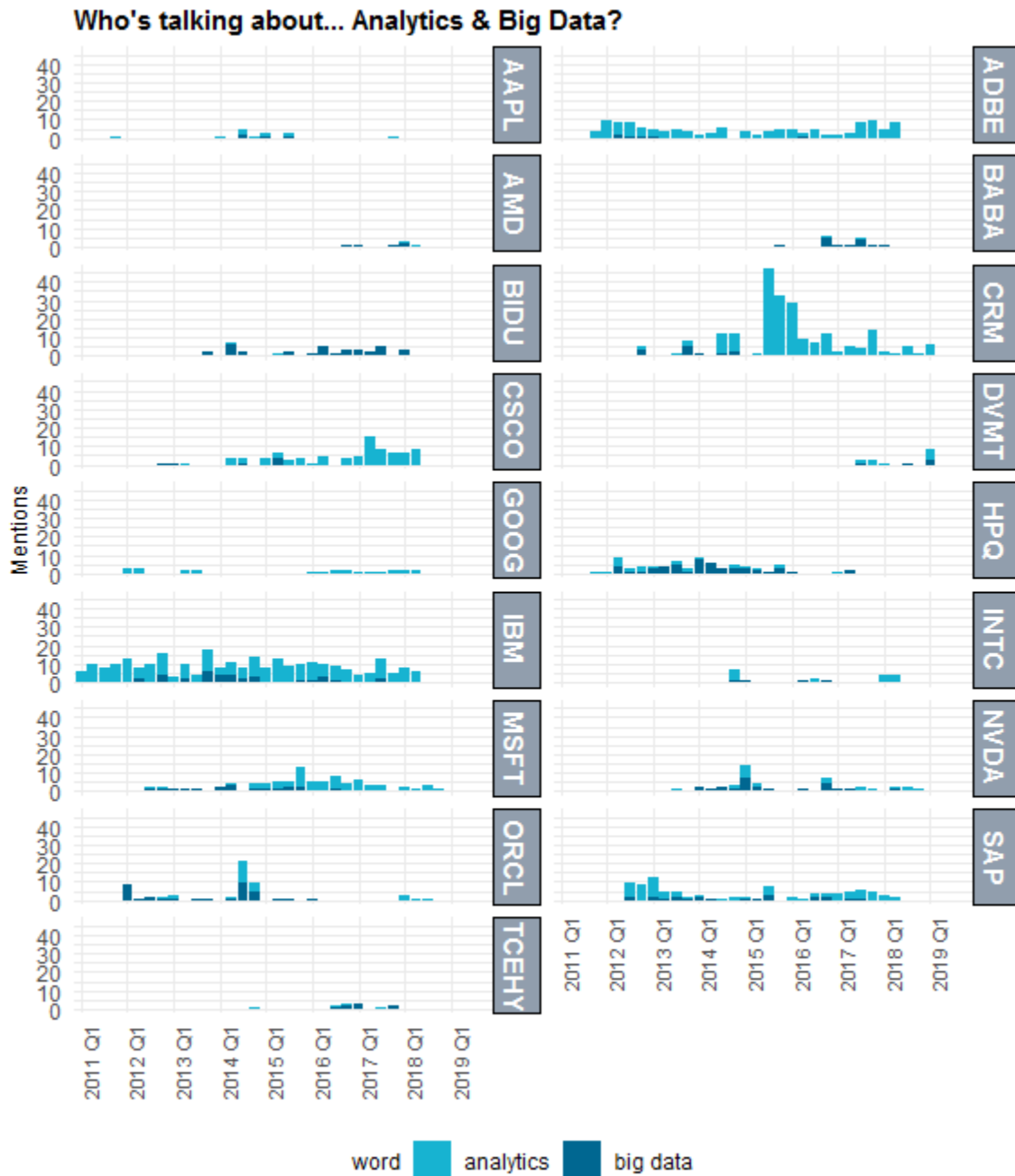


Who's talking about... Wearables & AR/VR?



Discussion of Analytics & Big Data

Top uses of Analytics & Big Data



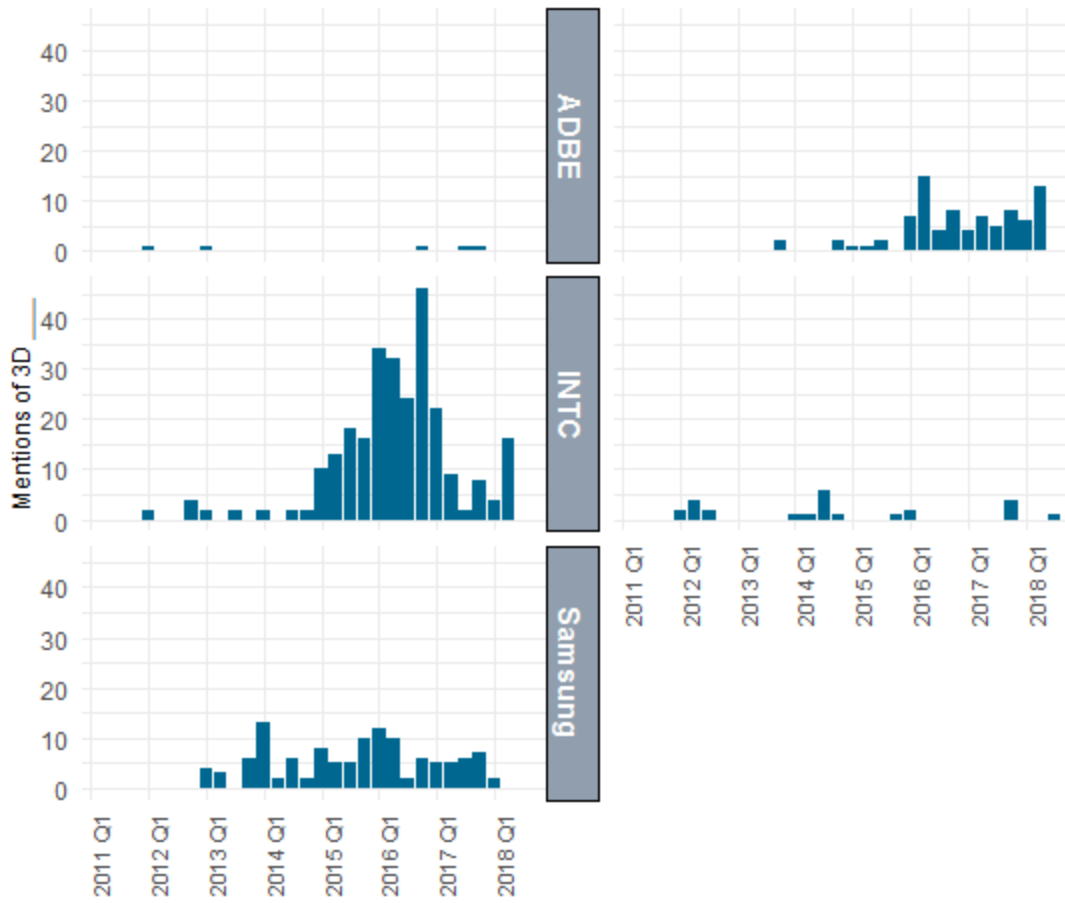
Uses of 3D

Top words prefixed by 3D

company	camera	manufactur	nand	on	print	reconstruct	transistor	vision	xpoi
HPQ	0	3	0	3	69	0	0	0	0
INTC	6	0	98	0	0	0	8	0	144
NVDA	0	0	0	0	0	3	0	3	0
samsung	0	0	97	0	0	0	0	0	0



Who's talking about... 3D?



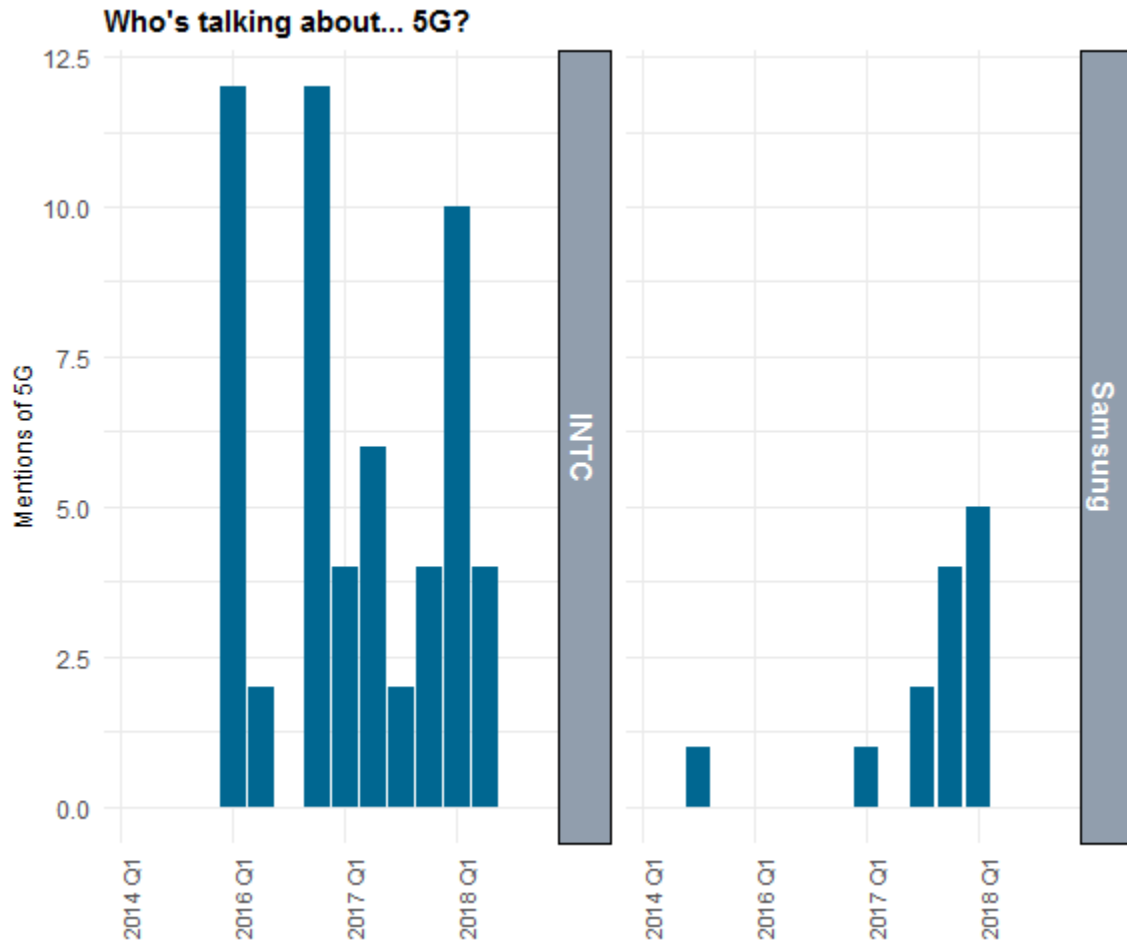
Uses of Quantum

Top words prefixed by Quantum

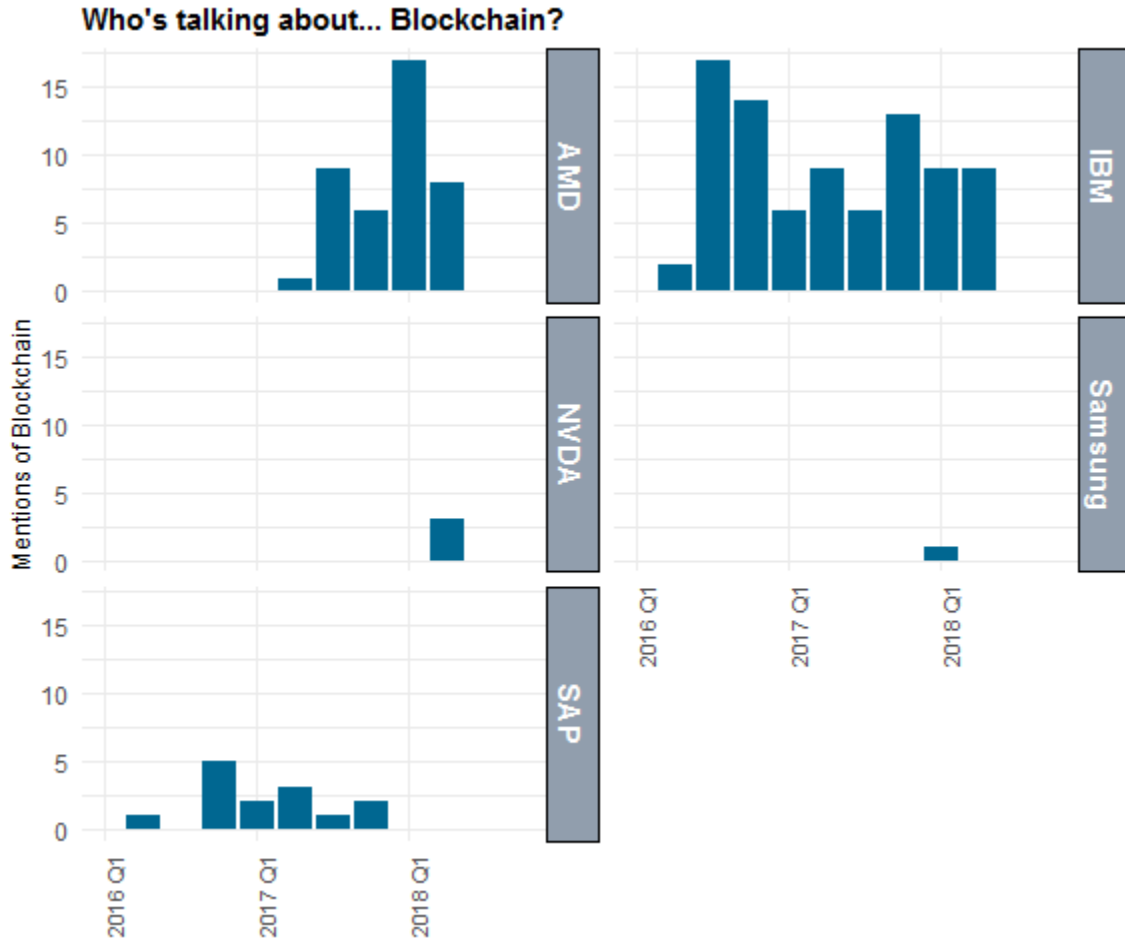
Company	first_word	second_word	n
Samsung	quantum	dot	61
NVDA	quantum	chemistri	5
IBM	quantum	comput	4
NVDA	quantum	leap	2
HPQ	quantum	group	1
IBM	quantum	experi	1
IBM	quantum	inform	1
IBM	quantum	isn't	1
IBM	quantum	system	1
INTC	quantum	form	1
MSFT	quantum	break	1
MSFT	quantum	new	1
Samsung	quantum	also	1
Samsung	quantum	includ	1
Samsung	quantum	interpret	1



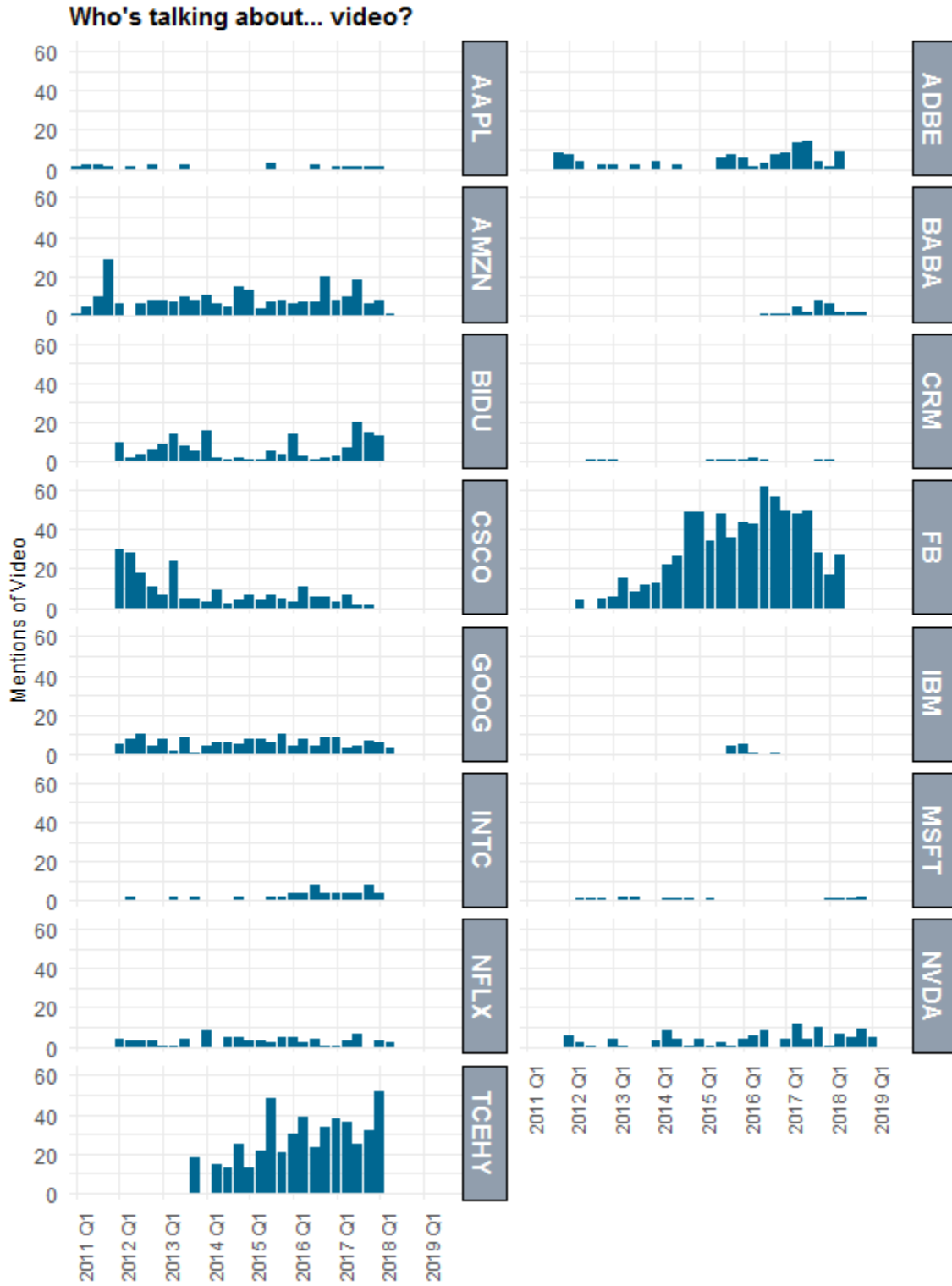
Uses of 5G



Uses of Blockchain



Uses of Video



Uses of Cloud

