



# The World Market for Internet Connected Devices - 2012 Edition

A detailed analysis of the market size and composition for the “Internet of Things”

The world is becoming increasingly digital, driven by near ubiquitous connectivity, inexpensive processing and sensor solutions, and the ability to use the Internet to facilitate and expand communication between electronic devices. These “Internet connected devices” can be used to enhance interpersonal communication, automate complex and/or tedious industrial processes, and provide a wealth of information.

There have been numerous estimates provided regarding the potential size of this market, ranging from the decidedly conservative to wildly optimistic. To that end, IMS Research, the leading independent provider of market research and consultancy to the electronics industry, has commenced work on a new market research report which will provide a realistic estimate of the current and future market size for Internet connected devices, with clearly defined scope and transparent methodology.

IMS Research is well positioned to conduct this research, with its extensive up-to-date portfolio of primary research-based reports and data sets covering virtually every key electronics and industrial automation market in the world. This report will aggregate key data points from across its entire research portfolio to create a detailed “bottom-up” analysis of the market for Internet connected devices. This report will also draw upon expertise from dedicated research groups which cover the wired and wireless communications markets.

## Key Questions to be Answered

- **What is the current installed base of connected devices, and what types of networks are being utilized? How much of a role will cellular networks play in the growth of connected devices?**
- **What is the demand for “smart” connected devices, which combine sensors, connectivity, and embedded processing capabilities?**
- **Which industries and vertical markets will drive the growth of connected devices?**
- **What is the forecast growth for connected devices over the period 2012 to 2016? What will the installed base of connected devices be in 2020?**



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## Report Content

### MARKET SEGMENTATIONS

The following table and figure highlight how the worldwide market for Internet connected devices will be statistically represented within the study. Each market sector will have specific analysis and data presented, and then aggregate totals will be presented for a worldwide summary. For this study, IMS Research will perform all analyses in terms of unit shipments and installed base. For each table presented, 2011 will be used as the base year with forecasts presented from 2012 to 2017. Worldwide top-level data will be presented for all breakdowns. In addition, a worldwide aggregated forecast will be provided to 2022.

Table 3.15

#### Internet Connected Devices - Medical - World

000s of Modules Shipped

**SAMPLE DATA**

	2011	2012	2013	2014	2015	2016	2017	CAGR 12 - 17
Installed Base - Medical Devices	112,639	113,294	114,608	116,384	118,943	121,814	125,299	2.0%
% Connected	87.0%	88.5%	90.0%	91.5%	93.0%	94.5%	96.0%	
New Shipments - Medical Devices	13,567	15,602	17,942	20,634	23,729	27,288	31,381	15.0%
% Connected	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
<b>Total Connected Medical Devices</b>	<b>97,996</b>	<b>100,265</b>	<b>103,147</b>	<b>106,492</b>	<b>110,617</b>	<b>115,114</b>	<b>120,287</b>	<b>3.7%</b>
Annual Growth		84.8%	129.6%	64.4%	82.4%	33.1%	26.4%	

#### By Device Class

- Node
- Controller
- Infrastructure

#### By Connectivity Type

- Wired
- WPAN
- WLAN
- WWAN

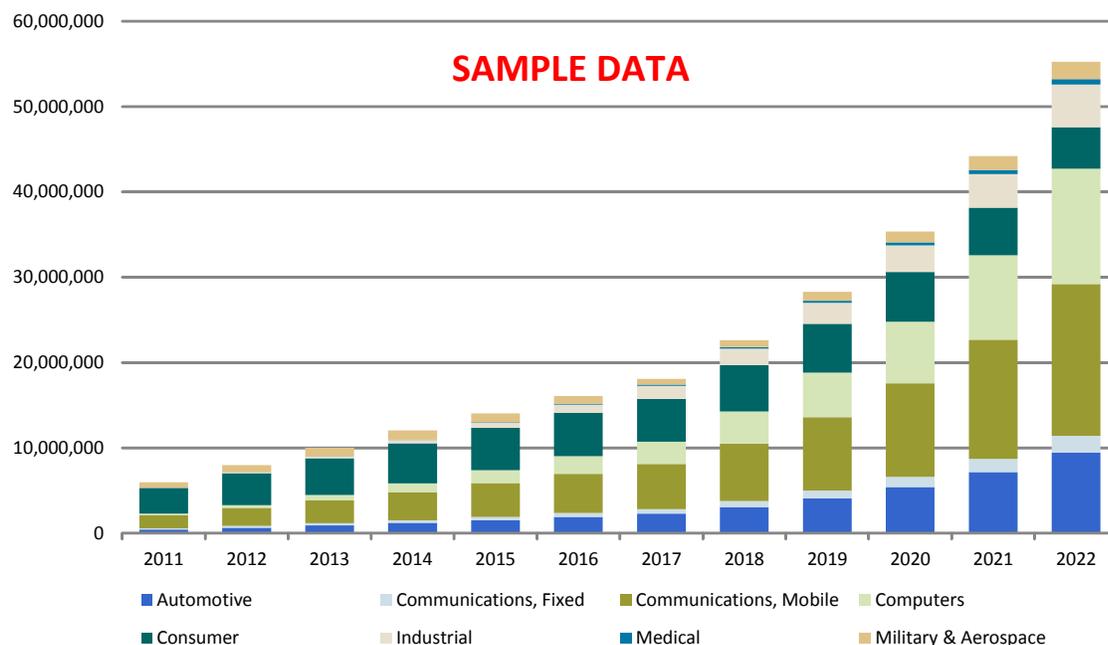
Source: IMS Research

Figure 4.6

#### World Market for Internet Connected Devices by Sector

000s of Connected Devices

**SAMPLE DATA**



Source: IMS Research

May-12

Note: The research will provide detailed information on the subjects listed here. However, the final report scope may change slightly, and therefore other issues may also be addressed.

## Early Purchase Program

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- Tailor the specification of the research to meet specific market research requirements (not required).
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## Report Process & Timescale

Report Process	Timescale
Key Issue Definition & Pre-Purchaser Enrollment	January 2012
Agree Specification With Pre-Purchasers	February and March 2012
Conduct Interviews & Perform Secondary Research	April and May 2012
Develop Report	June and July 2012
Publish Report	August 2012

## IMS Research

IMS Research is a leading independent supplier of market research and consultancy to the global electronics industry. We offer syndicated market studies, customized client research and consultancy services.

Our initial success as a provider of market research was heavily influenced by analyst ties to the semiconductor industry. Over the last decade of remarkable growth, we have expanded into most other sectors of the electronics industry, with dedicated analyst teams focused on the factory automation, automotive, communications, computer, consumer, displays, financial & ID, LED & lighting, medical, power, & energy, Solar PV, Smart Grid and security markets. We now publish more than 350 reports annually and sell to more than 50 countries worldwide.

Today IMS Research has around 125 analysts spread across six locations: Austin (TX), USA; Seoul, Korea; Shanghai, China; Taipei, Taiwan; Tokyo, Japan and Wellingborough, UK. Our global presence enables us to provide clients with comprehensive and detailed research on today's international markets.

## Semiconductors Group

Semiconductor and component market research has been provided by IMS Research since its foundation in 1989. The Semiconductors Group's extensive portfolio covers key areas in Embedded Processing, Analog and Mixed Signal, Optoelectronics, and a host of focused reports such as this on semiconductor content in target products or fields.

The Semiconductors Group provides a strategic advantage in its analysis drawing upon the data collected from literally tens of thousands of hours of research accumulated annually from approximately 150 of the company's end-equipment research projects to provide a comprehensive top down model for the overall semiconductors market. They have built extensive relationships with major semiconductor suppliers to build a bottom-up analysis of the semiconductor component supplier market. The combination of these two factors provide an excellent domain for verifying data and understanding both the competitive and convergent nature of the this market as no boutique research provider can.

Semiconductors Group analysts have primarily engineering related backgrounds. In addition to syndicated reports and database subscriptions, they can also participate in speaking engagements as well as provide custom research and consultancy to clients.

## General Provisions

This proposal is intended as a guide for our clients. While IMS Research does everything in its power to adhere to the schedule, dates are subject to change for reasons of increased scope or detail, or because of delays in securing commitment or data from suppliers. Once a company has committed to purchase the report, it shall not be free to withdraw from its commitment without the prior consent of IMS Research.

Clients are billed for the study once the report specification has been finalized. IMS Research enters into the contract to supply this research on the condition that if, in its judgement, the number of early purchasers is insufficient, IMS Research may elect not to proceed with the program. If IMS Research does decide not to continue for this reason, it will inform all early purchasers and refund any payments that have already been made, thereby discharging IMS Research's obligation.

