

Smart Accessories ~ Smart Devices!

This whitepaper is an extract from:

Smart Wireless Accessory Ecosystems CE, Payments, Fitness & Healthcare 2012-2017



. . . information you can do business with

Smart Accessories ~ Smart Devices!

I. Introduction

Smart hardware accessories to the smartphone have only been possible since the arrival of the iPhone created the app ecosystem necessary for their development some five years ago and only been practical even more recently as critical mass makes it worthwhile to develop business models based on smart wireless accessories. However Juniper Research believes that the smartphone, furnished with a relevant app, is set to become an important means of linking external devices and peripherals to the cloud, thereby becoming a central point for processing and forwarding content to web-based portals or cloud-based applications. An example of this is a connected blood pressure monitor, a remote baby alarm linked to the mobile network or a payment reader hardware add-on. The coming together of smart hardware and companion apps represents a further enhancement of the app ecosystem, and one without excessive development costs.

Juniper Research has identified four sectors in which it will play an important role in this new ecosystem:

- Consumer electronics
- Payment
- Fitness
- Healthcare

Juniper Research anticipates that other sectors will also benefit from connecting external hardware to the smartphone, among these is the automotive industry where the smartphone is integrated into the head unit of the vehicle.

Though the subsidiary hardware to which the smartphone links varies by industry, there are nevertheless several elements which unite the business propositions that are built upon smart wireless accessories or app-enabled devices which links to the smartphone. In most cases the smartphone can act as a hub for the collection and transfer and processing of content or data. And usually the smartphone peripheral is part of a wider service offering which varies by industry and use case.

In the case of a baby monitor add-on to the Apple iOS or Android device, the service is fairly simple, and limited to the smartphone and the baby monitoring hardware. For advanced mHealth use cases, however, patient portals, electronic health records and doctor's medical IT infrastructure may also be integrated into a service created by uniting the smartphone with monitoring hardware.

2. Use Cases

The table below illustrates the principal use-cases for smart wireless accessories across the various industries and sectors considered in the latter chapters of the main report. The table subdivides the smart wireless accessory industry into four separate areas: mobile payment, consumer electronics, fitness and healthcare.

Table 1: Smart Wireless Accessories, Prospects, Companies and Use-Cases

Smart Accessory Use Case	Wireless Use Cases	Key Companies
Mobile Payment	Large Potential for small traders in developed geographical markets as well as individuals in certain circumstances	Square (US) iZettle (Europe) leading, larger players (PayPal, Google etc.) expected to follow
Consumer Electronics	Diverse, but niche use-cases including video eyewear, TV receivers and baby monitors. No single killer application exists as yet. This could limit take-up, although Juniper Research expects that new use-cases will emerge such as security applications	Vuzix (Video Eyewear), Elgato (TV receiver), iBaby, Foscam, Agasio, Blue Iris (Baby Monitoring)
Fitness	High take-up in developed markets; characterised by both niche players and global brands	Global brands: Nike, Adidas. Start-Ups: Jawbone Up, BodyMedia,
Healthcare	Self-administered healthcare represents the largest opportunity (weight scales, blood pressure cuffs); smartphone perceived as limited as a “medical” device however. This may hold back advanced monitoring applications. Some medical peripherals emerging (ultrasound, stethoscopes)	iHealth, Entra Health Systems, Withings (monitoring health signs. Mobisante (Mobile Ultrasound)

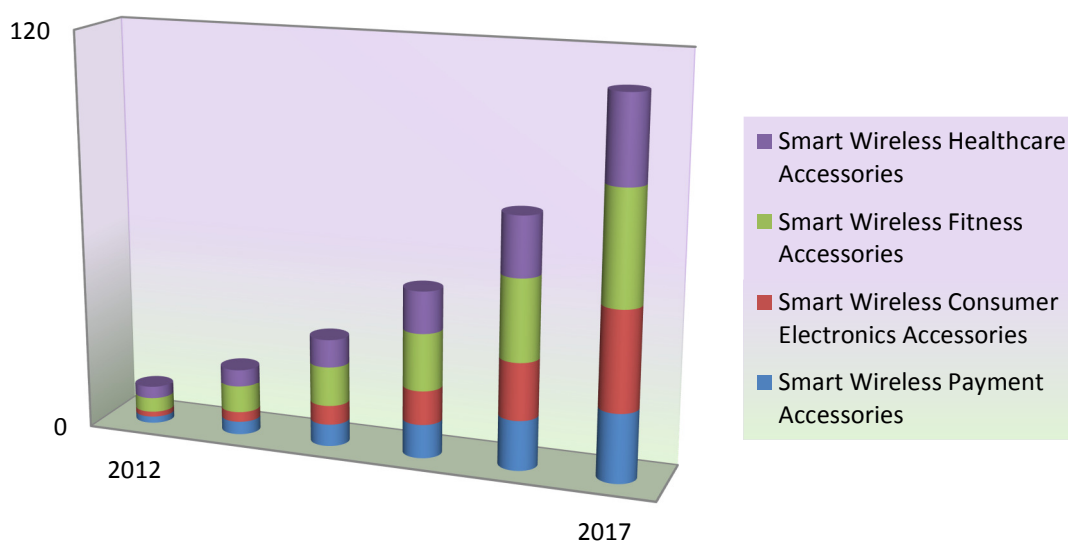
Source: Juniper Research

3. Smart Wireless Accessory Device Numbers

The following chart indicates the relative success of each smart wireless accessory type. By 2017 Juniper Research anticipates that there will be over 100 million smart wireless accessories across all categories. The market will be dominated by consumer electronics and fitness accessories, although in the long run healthcare smart wireless accessories are expected to gain traction.

Fitness smart wireless accessories already have seen substantial take-up following initiatives by global brands such as Nike and smaller start-ups such as Jawbone UP.

Figure 1: Global Number of Smart Wireless Accessories Bought per Year (m) Split by 8 Key Regions 2012-2017



Source: Juniper Research

Order the Full Report

Smart Wireless Accessory Ecosystems: CE, Payments, Fitness & Healthcare 2012-2017

- Market-by-Market Analysis & Forecasts
- Vendor Matrix Assessing Market Players
- Sector focus: CE, Payments, Healthcare, Fitness

This highly original report provides a unique insight into the smart wireless device ecosystem, providing sector by sector analysis not available elsewhere. The report provides an in-depth assessment of the opportunities within the emerging market for app-enabled devices, identifying the drivers affecting each discrete market and analysing the factors that will affect their growth.

Comprehensive forecast data is included, projecting the size and value of each of the four smartphone wireless accessory markets covered in the report:

- **Consumer Electronics:** adoption, sales volume and retail value
- **Payments:** adoption, sales volume, retail value and transactional revenue
- **Fitness:** adoption, sales volume and retail value
- **Healthcare:** adoption, sales volume, retail value and service revenue

The report also provides overall forecasts for tablet wireless accessories. Including 19 forecast tables split by eight key regions, with over 1,026 unique data points. It offers unrivalled projections for the size of these relatively-untapped markets.

A Unique Vendor Matrix intuitively presents Juniper's assessment of the capabilities of selected vendors that are active in the smart wireless accessories space, including: Adidas, Elgato, Entra Health Systems, iHealth, iZettle, Telecom Italia MDH, Nike, Square, Telecom Italia MDH, Vuzix and Withings.

Drivers and constraints are assessed on a market-by-market basis, providing all players from the value chain with an understanding of what will make the market successful. Expert analysis of the relevant business models identifies how these disparate markets are being monetised.

Readers will also benefit from the companion Smart Wireless Accessory Ecosystems Excel: CE, Payments, Fitness & Healthcare 2012-2017. With forecasts definitions and methodology and an interactive menu, this well-presented Excel workbook enables users to easily navigate and understand the forecast data from the report.

Juniper Research Limited

Juniper Research specialises in providing high quality analytical research reports and consultancy services to the telecoms industry. We have particular expertise in the mobile, wireless, broadband and IP-convergence sectors. Juniper is independent, unbiased, and able to draw from experienced senior managers with proven track records.

Publication Details

Publication date: July 2012

Author: Anthony Cox

For more information, please contact: Michele Ince, General Manager michele.ince@juniperresearch.com

Juniper Research Ltd, Church Cottage House, Church Square, Basingstoke, Hampshire RG21 7QW UK

Tel: +44 (0)1256 830001/475656

Fax: +44(0)1256 830093

Further executive briefings and whitepapers can be downloaded at www.juniperresearch.com