

MOOR INSIGHTS & STRATEGY

BEHAVIORALLY SEGMENTING THE INTERNET OF THINGS (IoT)

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WHAT IS IOT?

“uniquely identifiable objects and their virtual representations in an Internet-like structure”

“collection of smart, sensor-enabled physical objects, and the networks, servers and services that interact with them”

“networks of RFID-equipped objects to ease identification and tracking”

“network of physical objects accessed through the Internet”

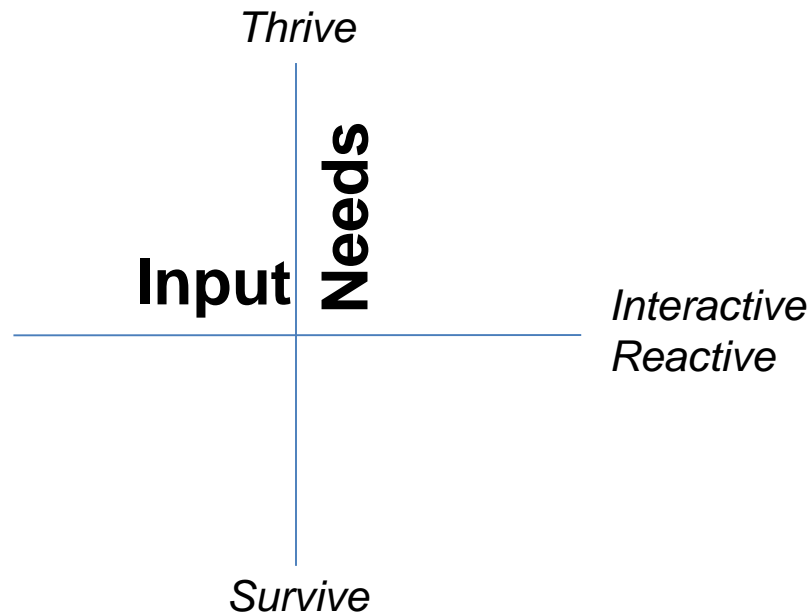


SEGMENTING IoT BY BEHAVIORS- INPUTS AND NEEDS

*Optimize: Money, Time,
Resources, Emotions*

*Rules can be
changed, but
human-driven
changes are external
to normal behavior*

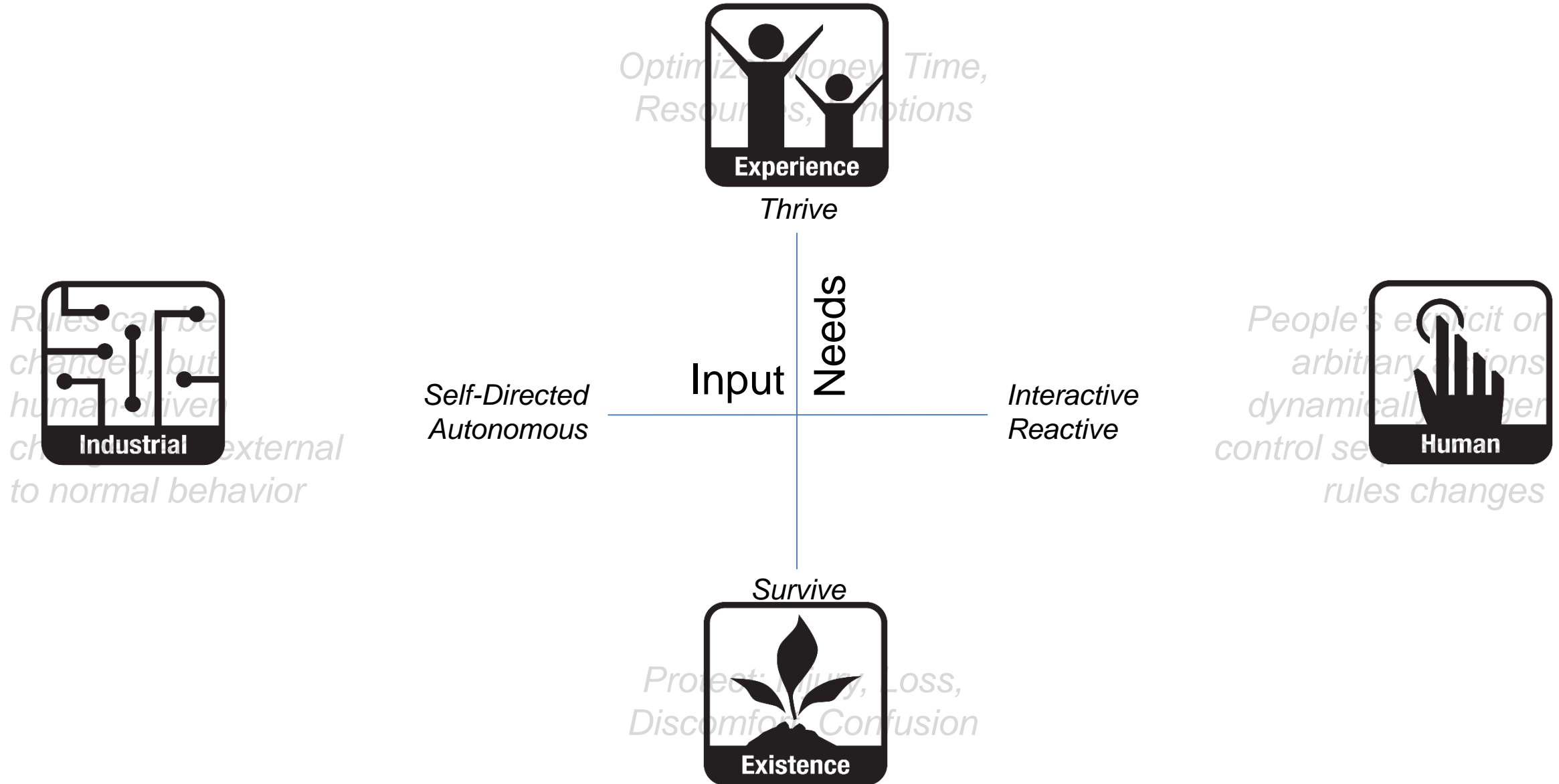
*Self-Directed
Autonomous*



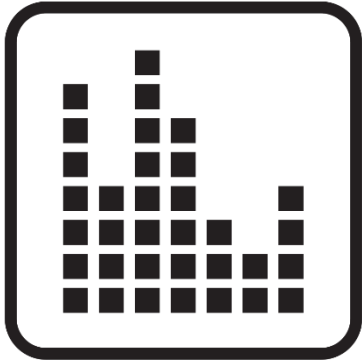
*People's explicit or
arbitrary actions
dynamically trigger
control sequences or
rules changes*

*Protect: Injury, Loss,
Discomfort, Confusion*

FOUR IoT END POINTS



FOUR IoT SEGMENTS

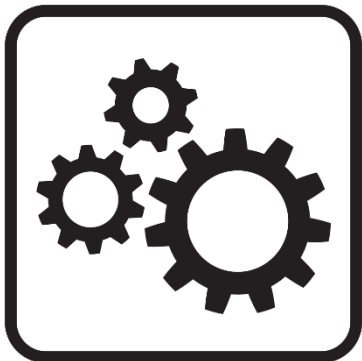


Monitoring

Finding Exceptions to Patterns

Generating New Patterns

Smart Meters
Fleet Tracking
Insurance Health Measurement



Operational

Enforcing Continuous Patterns

Robotics
Industrial HVAC Systems
Active Security Systems
Professional Medical Systems

Attainment

Enabling Discretionary Wants

and Lifestyle Improvement

Smart Watches & Jewelry
Exercise Tracking
Smart Toys
Home Automation (short-term)



Life

Enhancing Fundamental Needs

Smart Major Appliances
Residential HVAC Systems
Home Automation (long-term)

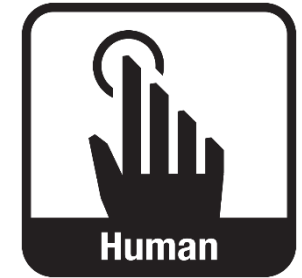


THRIVE VS. SURVIVE NEEDS SERVICES VS. END-POINTS



Thrive

Services Differentiate



End-Points Differentiate

Survive



AUTONOMOUS VS. INTERACTIVE INPUT

LOCAL INTERCONNECT VS. USER EXPERIENCE



**Local Interconnect
Differentiates**

**User Experience
Differentiates**

*Self-Directed
Autonomous*

*Interactive
Reactive*

BROWNFIELD VS. GREENFIELD



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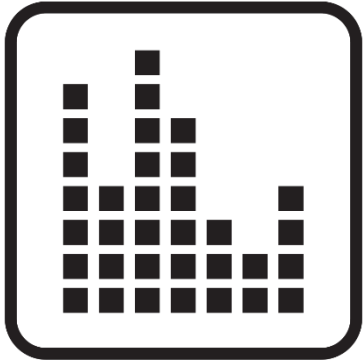
Life

Enhancing Fundamental Needs

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Residential HVAC Systems
Home Automation (long-term)



SEGMENT SIZING 2020



Monitoring
\$4.0TN

Attainment
\$1.5TN



Operational
\$2.5TN

Life
\$2.0TN



DETAILED FORECASTS AVAILABLE THROUGH MI&S [CUSTOM FORECASTING SERVICE](#)

BARRIERS TO ADOPTION- INDUSTRIAL IOT



- Security
 - Impact of an intrusion/control incident
- Lack of standards
 - Multivendor across data, gateways, “operating ecosystems”
- System of systems complexity
 - Interoperability and one “throat to choke” for buggy behavior
- Inadequately scalable IT
 - Mainstream datacenter architectures and in-house expertise are ill-prepared for data onslaught

BARRIERS TO ADOPTION- HUMAN IOT

- **Simplicity**
 - User experiences (UX) that delight and also behave as intended (actually work)
- **Nerd effect**
 - It's jewelry and fashion, people
- **Battery life**
 - Weeks and months, not days
- **Lack of standards**
 - Consumer confusion with multivendor solutions like home automation



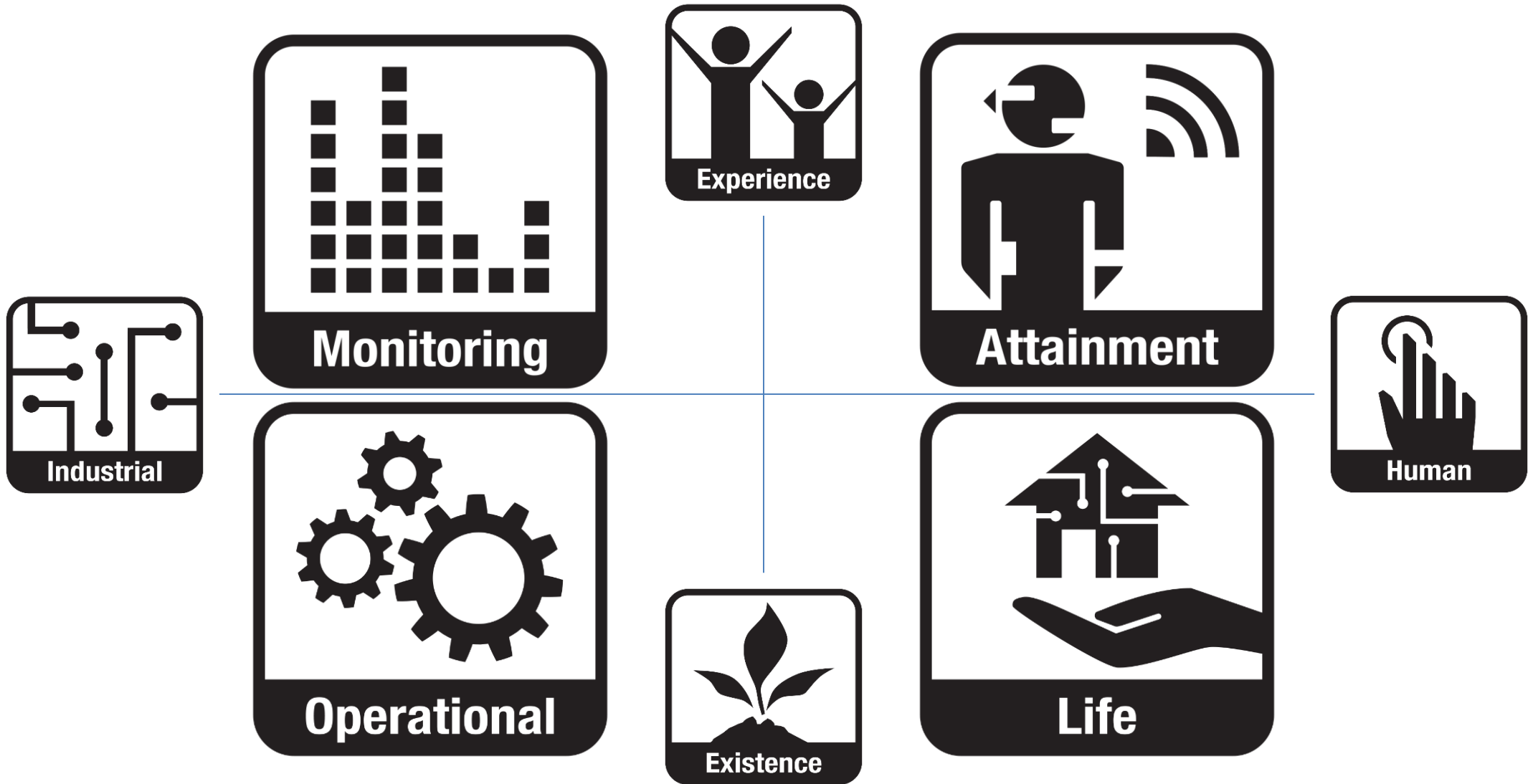
Human • Experience



Human • Existence



IoT AXIS AND SEGMENTS



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- One of the most cited analyst firms in the world
 - Patrick is U.S., U.K., and Europe's most cited technology analyst¹
- Independent, boutique technology analyst firm
 - Focused on IoT, cloud, mobility, scale-out datacenter
 - Provide advisory, consulting, custom analysis services
- Backgrounds with real technology product, strategy, marketing experience
- Work with premiere IoT, client, chip, datacenter, mobile, cloud companies

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¹Apollo Research, January 2014

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