

Worldwide Quarterly Enterprise Client Device Tracker

IDC's *Worldwide Quarterly Enterprise Client Device Tracker*® monitors the worldwide quarterly shipment totals of thin clients and terminal clients. Thin clients are diskless desktop devices that exist only on a network, using a server to download applications and store data. Most traditional thin clients run a local embedded operating system (OS). A growing number of new devices are shipping with no local OS, and we categorize this type of device, often referred to as a "zero client," as a thin client without OS. Thin client devices are often used as part of a client virtualization deployment in companies and institutions of all sizes. Terminal clients are devices without a CPU or an operating system that connect to a PC running a multiuser operating system (such as Microsoft Windows MultiPoint Server 2012).

Technology Coverage

This tracker provides the total market size and vendor share for the following technology areas. Measurements for this tracker are in unit shipments and factory revenue.

Core Coverage

- Company and vendor
 - Enterprise thin clients: Standalone, mobile, with LCD, and with CRT
 - Terminal client devices: Standalone and with LCD
 - Channel group: Direct and indirect
 - Operating system
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Geographic Scope

- **Asia/Pacific (excluding Japan and PRC) (APEJC) (11):** Australia, Hong Kong, India, Indonesia, Korea, Malaysia, New Zealand, Philippines, Singapore, Taiwan, Thailand, and rest of Asia/Pacific
 - **Canada**
 - **Central and Eastern Europe (region only)**
 - **Japan**
 - **Latin America (2):** Brazil, Mexico, and the rest of Latin America
 - **Middle East and Africa (region only)**
 - **PRC**
 - **USA**
 - **Western Europe (16):** Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and the United Kingdom
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Data Deliverables

This tracker is delivered on a quarterly basis via a web-based interface for online querying and downloads. Deliverables for this tracker are listed below. For a complete delivery schedule, please contact an IDC sales representative.

- Preliminary data (region only, for top 5 global vendors and "others", and units only)
 - Historical data
 - Forecast data
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Forecast Coverage

Forecasts for this tracker are updated quarterly and include three years of historical data and two years of quarterly forecasts, plus an additional three years of market projections. Forecasts are available at the worldwide, regional, and country levels. Details of the forecasts included in this tracker are provided below.

Core Forecast Coverage

- Thin client forecast by standalone, mobile, with LCD
- Thin client forecast by operating system
- Terminal client forecast

Optional Forecast Add-Ons

- Channel group (direct versus indirect)

IDC's Tracker Methodology

IDC's tracker data is developed using a rigorous methodology that includes well-planned and well-coordinated local, regional, and worldwide data cross-checks combined with a proprietary advanced data consolidation and analysis data platform managed by IDC's Worldwide Tracker organization. Data sources used in the process of determining IDC's tracker numbers include, but are not limited to:

- In-country local vendor interviews
- Distribution data feeds
- Worldwide and regional vendor guidance
- ODM data
- In-country local channel partner discussions
- Import records
- Feedback from component suppliers
- Vendor briefings and public financial reports

Enabling Better Business Decisions Across the Organization

IDC trackers provide the accurate and timely market size, vendor share, and forecast information you need to identify market and product expansion opportunities, increase revenue, and win market share. IDC's tracker research is a critical input to the planning and monitoring cycles of the business process. Common uses of the tracker data include:

Planning Process

- Regional-, state-, or city-level planning — setting regional-, country-, state-, or city-level sales targets based on market opportunity
- Product marketing — creating a product strategy and road map based on currently available product features and expected growth
- Production planning — using customer demand data as an input in the creation of production schedules
- Product portfolio planning — accessing accurate and detailed data as an input into the product development process

Monitoring Process

- Performance measurement — comparing vendor performance on prior fiscal periods
- Competitive analysis — reviewing competitor performance across multiple dimensions: product, features, channel, segment, and geography
- Sales forecasting measurement — assessing internal sales forecast versus actual results
- Price benchmarking — comparing vendor versus market pricing data by model
- Marketing communications — using positive results for messaging in the press, at partner events, or in sales collateral

IDC's Global Tracker Process at Work

