



MIA

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# Design Activity Tool

## **Part of the Semiconductor Market Service Area Package**

The industry's only comprehensive OEM system design activities analysis, including over 250 of the world's leading electronics application equipment companies

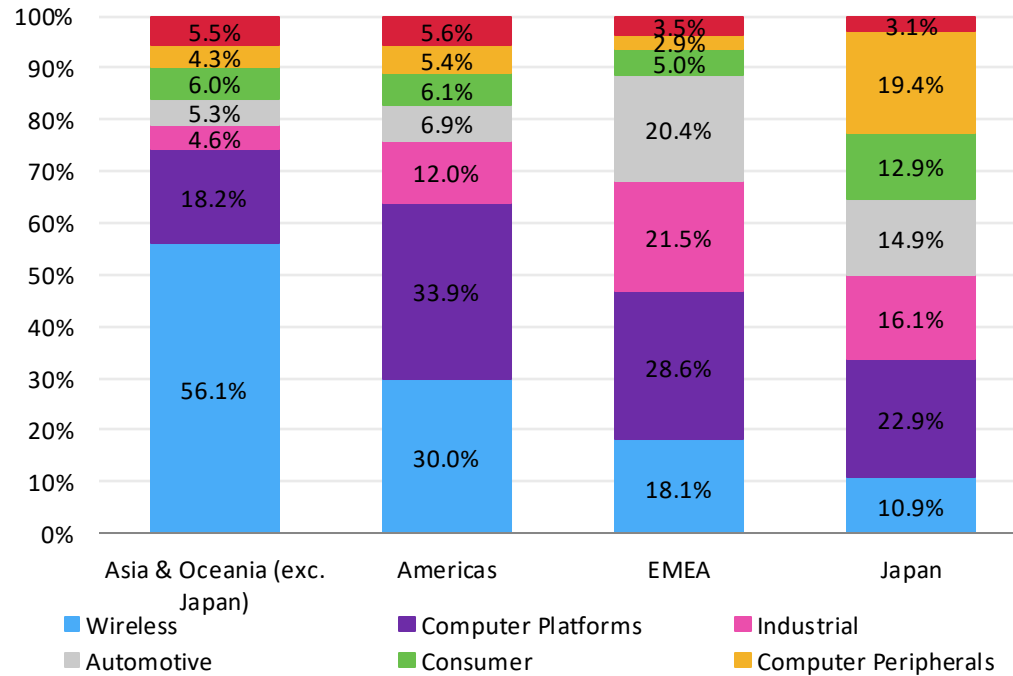
“ These are unique market research tools that provide valuable insights into the system design operations of the top electronics OEMs. ”

**Myson Robles-Bruce**  
Senior Principal Analyst

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Part of the Semiconductor Market Service Area Package

Regional design spend by market, 2022



Source: Omdia

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## How Omdia Helps You

- Prioritizing resources for winning new business by knowing where OEM engineering teams are designing systems and making semiconductor selections
- Only research available that examines system design activities of the electronics OEMs (ex: Apple, Samsung, Lenovo, etc.) at the regional and country levels

## Key Questions Addressed

- Where in the world do the top OEMs have their systems designed?
- How much semiconductor business by application and by device type can be attributed to design decisions in a particular country or region?
- How many "design-win" resources do I assign to a particular account, country, or region?
- On which countries should we focus our advertising budget?

# Semiconductors Markets: Our Expert Analysts



**Myson Robles-Bruce**  
*Senior Principal Analyst*



**Marlina Omar**  
*Research Analyst*

# Design Activity Tool: Deliverables



## MARKET TRACKERS

— Semi annually —

Design Activity Tool Product Suite



## DATABASE

— Semi annually —

R&D Center Database



## REPORTS

— Semi annually & quarterly —

Executive Summary Reports



## ANALYST INSIGHTS

— Ongoing —

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



## ANALYST ACCESS

— Ongoing —

For prompt responses to urgent and unique questions.



# Design Activity Tool: Market Data & Database

## Design Activity Tool Product Suite

Contains both qualitative and quantitative research elements. The provided Excel database pivot table tool allows you to dice and dissect the dataset in a myriad of ways to quickly drill down to the information you need.

### Details

**Frequency:** Semi-annual releases, with quarterly interim report updates  
7-year annual series (2015 - 2021)

### Measures

- Design Spend
- Geographic Region Country
- Application Market
- Application Sub-Market
- Semiconductor Component Category
- Semiconductor Device Category

### Regions

- Americas, Asia Pacific, EMEA (Europe, Middle East & Africa), Japan
- 68 Countries

### Coverage

#### Electronic Equipment Markets

- Automotive, Computer Peripherals, Computer Platforms, Consumer, Industrial, Wired Communications, Wireless Communications
- 35 Sub-market categories

#### Semiconductor Components

- Analog IC, Discretes, Logic IC, Memory, Microcomponent IC, Optical, Sensors and Actuators
- 28 Device categories

## R&D Center Database

Detailed analysis of over 5,000 R&D locations around the world.

### Details

**Frequency:** Semi-annual releases, with quarterly interim report updates  
7-year annual series (2015 - 2021)

### R&D Center Database Measures

- Region, Country, City, Address
- Application Market
- Products
- Type of Activity
- Number of Engineers

### Regions

- Americas, Asia Pacific, EMEA (Europe, Middle East & Africa), Japan
- 68 Countries

### Coverage

#### Electronic Equipment Markets

- Automotive, Computer Peripherals, Computer Platforms, Consumer, Industrial, Wired Communications, Wireless Communications
- 35 Sub-market categories

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# Design Activity Tool: Report & Market Insights

## The Executive Summary Reports & Market Insights

Provide a quick and easy read, highlighting all the key trends in OEM semiconductor spending and design activity

**Frequency:** Semi-annually and quarterly releases

Design Activity Tool Executive Summary reports go together hand in hand with the databases, offering qualitative opinionated research that highlights trends in OEM semiconductor spending. The report is synthesized with OEM Semiconductor Spend in [OEM Semiconductor Spending & Design Activity reports](#) to provide clearer connections between the two services.

Online research area is updated with [Market Insight articles](#) covering special topics of interest to subscribing clients. These articles often contain the latest semiconductor spending data available for OEMs, application markets, and components.

## TRAX Online

This online market insights tool additionally leverage the entire Omdia analyst community, giving a real-time analysis and coverage of major events such as key mergers and acquisitions and new product developments

**TRAX** offers Web-based interactive customization and visual charting of Design Activity Tool data.

# Design Activity Tool: Methodology

## METHODOLOGY

Spending estimates were prepared using systems revenue and/or unit data and applying semiconductor content ratios to the data. These ratios were obtained from the Omdia Application Market Forecast Tool and various other research methods including examining bill-of-materials and teardowns. The assumptions were further fine-tuned based on the product mix and design preference of the individual OEM/Brand. This initial model data was then augmented by input on spending from the OEM/Brand themselves, suppliers, or other industry sources.

## DESIGN SPEND ESTIMATES

Omdia used its extensive databases on semiconductor content of various system types as the primary first pass method of determining the chip spend by account. These numbers were then modified by various primary research methods (primarily interviews). Omdia analysts who are experts in systems markets, EMS/ODM outsourcing, and semiconductor devices were also utilized to ensure quality.

## HOW 'SPENDING' IS DEFINED

In order to properly account for chip consumption by certain companies, Omdia has eliminated the double accounting of purchased "branded" subsystems such as storage systems, monitors, mice, keyboards, etc. Also, many companies engage in buy or sell activities to round out product lines. For this analysis, purchases of notebook computers and handsets from ODMs are considered as part of the OEM supply chain.

## REGIONAL & COUNTRY ESTIMATES

Inputs for these estimates were obtained from the actual companies and from analyst disclosures and various secondary sources. Omdia also uses its own Competitive Landscape Tool and Application Market Forecast Tool to provide regional chip shipment guidelines. Country level estimates were created using R&D Center Database research.

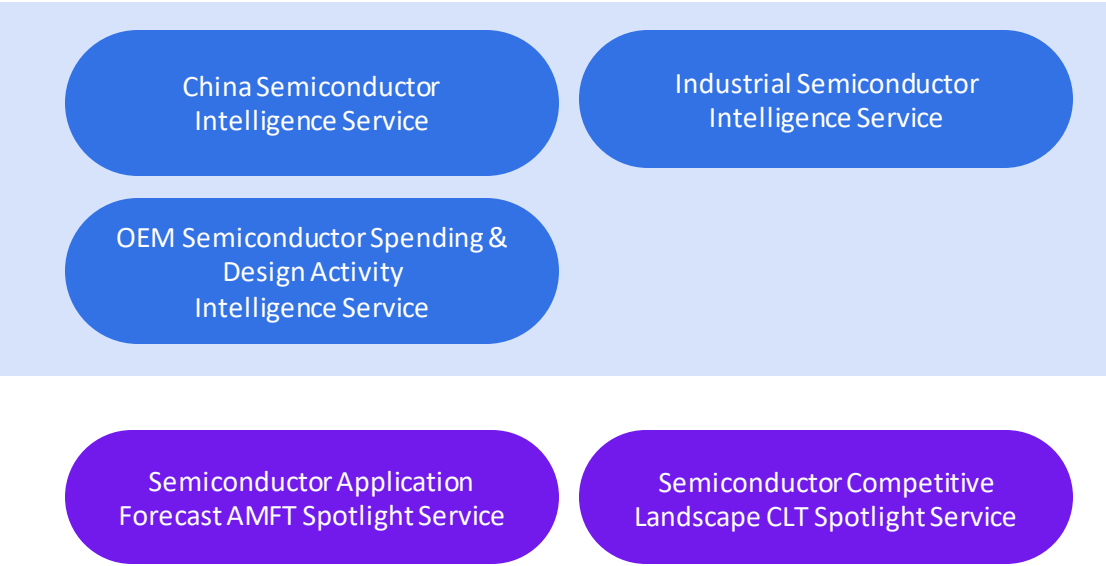
## APPLICABLE TO

- Semiconductor Suppliers
- OEMs
- Design Firms
- EMS Providers
- Electronics Distributors
- Material Suppliers
- Governmental Agencies
- Academic Institutions



# Related Content: Semiconductor Market Service Area Coverage

## Service Area Package: Semiconductor Market



## About Omdia’s Semiconductor Market Research

Omdia’s leading semiconductor market research is provided by a highly experienced team of analysts. Many are industry veterans with deep technical background as well as hands-on market and product experience in their coverage area.

The foundation of all the coverage comes from primary research with the major semiconductor suppliers across the global industry. This insight feeds a global and regional view of the industry by technology and by application including historical and forecasted views presented through the CLT and AMFT solutions.

From this core data, the research is augmented through additional primary research to deliver China, Industrial and then an OEM spend and design activity views.

# Related Content: Semiconductor Service Area Coverage

SERVICE AREA PACKAGE			
Memory & Storage	Semiconductor Components	Semiconductor Manufacturing	Semiconductor Market
<ul style="list-style-type: none"> <li>• DRAM Memory Intelligence Service</li> <li>• Mobile &amp; Embedded Memory Intelligence Service</li> <li>• NAND Memory Intelligence Service</li> <li>• SSD &amp; HDD Storage Memory Intelligence Service</li> </ul>	<ul style="list-style-type: none"> <li>• Key Mobile Component Price Service</li> <li>• LED Intelligence Service</li> <li>• MEMS &amp; Sensors for Consumer &amp; Mobile Intelligence Service</li> <li>• MEMS &amp; Sensors Intelligence Service</li> <li>• Optoelectronic Components Report</li> <li>• Power Semiconductor Intelligence Service</li> <li>• Processors Spotlight Service (incl. MCU, Graphics &amp; AI, Networking Infrastructure, System-on-Chip Trackers)</li> </ul>	<ul style="list-style-type: none"> <li>• Global Semiconductor Manufacturing Market Tracker</li> <li>• Pure Play Foundry Market Tracker</li> <li>• Semiconductor Silicon Demand Forecast Tool</li> </ul>	<ul style="list-style-type: none"> <li>• China Semiconductor Intelligence Service</li> <li>• Industrial Semiconductor Intelligence Service</li> <li>• OEM Semiconductor Spending &amp; Design Activity Intelligence Service</li> <li>• Semiconductor Application Forecast AMFT Spotlight Service</li> <li>• Semiconductor Competitive Landscape CLT Spotlight Service</li> </ul>

# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

## Draw on our expertise

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- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

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**Shelley Hunter**  
*Customer Success  
Manager*



**Kâren Dyer**  
*Customer Success  
Manager*



# Get in touch!

 [askananalyst@omdia.com](mailto:askananalyst@omdia.com)

 [@Omdia](https://www.linkedin.com/company/omdia)

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# Thank you

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customersuccess@omdia.com

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