

10-11 NOV 2015 AMSTERDAM

IoT: CONNECTED ENTERTAINMENT & THE SMART HOME

KEYNOTES

10:15 – 10 NOV

icontrol
NETWORKS

"The EU vs. U.S. Smart Home Market: Differences and Opportunities"

Greg Roberts, Vice President, Marketing, Icontrol Networks

15:30 – 10 NOV

nest

"From Connected to Thoughtful: How Technology is Transforming the Future of the Home"

François Girodolle, Head of Product Partnerships, Nest Europe, Nest Labs, Inc.

9:15 – 11 NOV

VIACOM INTERNATIONAL MEDIA NETWORKS

"TV RE[DEFINED]"

Christian Kurz, SVP Research, Insights and Reporting, Viacom International Media Networks

11:15 – 11 NOV – FIRESIDE CHAT

T

Honeywell

"Understanding Early Adopters: Next Stage of the Connected Home"

Jon Carter, UK Head of Business Development - Connected Home, Deutsche Telekom

Mario Moura, General Manager Home Comfort & Energy Systems EMEA, Honeywell

PR CONTACT Holly Sprague @hollywsprague hsprague@gmail.com +1.720.987.6614

CONNECTIONS™ Europe—IoT: Connected Entertainment and the Smart Home focuses on the connected home ecosystem and the Internet of Things as it relates to the connected consumer in Europe and around the world. connectionseurope.com

Parks Associates Research Highlights

SMART HOME

Approximately 9% of broadband households in the U.K., Germany, Spain, and France own at least one smart home device.

Nearly 10% of broadband households in the U.K., Germany, Spain, and France have a home control system. Most of these systems are part of a home security system.

6% of U.K. broadband households have a smart thermostat, 5% in Germany and France, and 4% in Spain.

35% of U.K. broadband households have a security system, compared to only 18% in Spain. However, 15% of Spanish broadband households have a monitored security system, compared to only 11% in the U.K.

One-third of broadband households in the U.K., Germany, Spain, and France plan to purchase a smart home device in the next 12 months, with intentions highest in Spain (37%) and lowest in the U.K. (24%).

DIGITAL MEDIA

Among broadband households, 72% in Spain, 57% in Germany, 55% in the U.K., and 51% in France watch Internet video on an Internet-connected device.

33% of U.K. broadband households used the iPlayer online video service in the past 30 days.

Among broadband households, 72% in Spain, 57% in Germany, 55% in the U.K., and 51% in France watch online video content (TV shows or movies) on devices such as a PC, tablet, smartphone, or smart TV.

CONNECTED CE

45% of broadband households in the U.K., Germany, Spain, and France have a smart TV, with the highest penetration in Germany.

57% of broadband households in the U.K., Germany, Spain, and France own at least one Internet-connected CE device (smart TV, smart Blu-ray player, PVR, gaming console, or streaming media device).

15% of Western European broadband households own a streaming media device. Highest penetration is in the U.K., where 20% of broadband households have a streaming media device.

8% of U.K. broadband households have at least one smart watch—adoption is 10% in Spain, 6% in France, and 7% in Germany.

12% of Spanish broadband households plan to purchase a smart watch in the next 12 months, while 8% in the U.K. and 10% in Germany and France plan to make this purchase.

21% of U.K. broadband households with at least one Internet-connected CE use a DVR most frequently to access online video content, compared to only 5% or less in France, Germany, or Spain.

ACCESS & ENTERTAINMENT SERVICES

Pay-TV adoption among broadband households: 50% in Spain, 87% in Germany, 74% in the U.K., and 75% in France.

© Parks Associates.

All data, analyses, and conclusions in this document belong to Parks Associates. Please cite Parks Associates when using any information from this document.

Join the Conversation

@CONNECTIONS_EU
#CONNEU15

Research from
@ParksAssociates

New research & interactive discussions on business strategies & new technologies

European Research recently cited in the Media

The Guardian - 4 March 2015

"Apple and HBO 'in talks over streaming partnership'"

The loss of exclusive access to HBO is likely to contribute to increased numbers of cord-cutters – as people who drop cable packages for standalone broadband access are known. A recent study from tech analyst **Parks Associates** predicted HBO Now could chip 7% off the pay-TV subscriber base.

IP&TV News - 19 June 2015

"Study reveals strong European appetite for smart home"

Among European broadband households, 17% in Germany, 22% in Spain, and 24% in the U.K. find a smart thermostat very appealing. However, EU households overwhelmingly prefer systems over individual devices, so interoperability will be a key challenge alongside building consumer awareness.

International Business Times - 2 October 2015

"Amazon to stop selling Apple TV and Google's Chromecast on its marketplace"

According to an August report by research firm **Parks Associates**, 86% of all media-streaming products sold to U.S. households with broadband in 2014 consisted of Amazon, Apple, Google and Roku's devices and it is estimated that around 86 million media-streaming devices will be sold globally in 2019.

TechZone 360 - 20 October 2015

"With Connected TVs Increasing, Cable Must Adapt"

Parks Associates has found that 45 percent of Western European households equipped with broadband own a smart TV. Widespread adoption of the connected TV model fits the narrative of evolving, smarter TV viewing, while spelling a major shift in the market.



New Consumer Research from Parks Associates

European Connected Consumer

Adoption Among Broadband Households:

Internet-connected CE	Smart Thermostats
55% Germany	5% Germany
59% Spain	4% Spain
52% France	5% France
63% The U.K.	6% The U.K.
Gaming Consoles	Home Control Systems
48% Germany	8% Germany
63% Spain	10% Spain
49% France	10% France
48% The U.K.	11% The U.K.
Smartphones	Tablets
82% Germany	52% Germany
90% Spain	66% Spain
78% France	57% France
76% The U.K.	66% The U.K.

© Parks Associates

Parks Associates' UPCOMING EVENTS



CONNECTIONS™ Summit at CES

January 6-7, 2016
Las Vegas, NV

CONNECTIONS Summit.com



Smart Energy Summit: Engaging the Consumer

February 22-24, 2016
Austin, TX

SES2016.com



CONNECTIONS™: The Premier Connected Home Conference

May 24-26, 2016
San Francisco, CA

CONNECTIONSUS.com



PARKS PERSPECTIVES

Follow Parks Associates Analyst Team on the analyst blog: www.parksperspectives.com

TOM KERBER

Director, Research, Home Controls & Energy

@TomAKerber

parksassociates.com/staff/tom-kerber

BRETT SAPPINGTON

Director, Research

@BrettsView

parksassociates.com/staff/brett-sappington

Sign up for industry newsletters

www.parksassociates.com/newsletter

REQUEST INTERVIEW OR INQUIRE ABOUT DATA:

CONTACT Holly Sprague
HSPRAGUE@GMAIL.COM

@hollywsprague
720.987.6614