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SUMMIT

PROFITING from CONNECTED HOME Devices & Services

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Welcome to

CONNECTIONS SUMMIT

Profiting from Connected Home Devices and Services

With increasing connectivity, every household screen can be repurposed by a different market segment to provide new smart home and entertainment services. The growing ecosystem of connected products opens up many options for service providers and CE manufacturers to provide additional services to consumers, including home monitoring and management, second-screen services, and tech support.

- By 2017, over 820 million households worldwide will have Internet service, and more than 94% will have broadband.
- Over 610 million households will have a data network, including over 100 million in North America and 133 million in Western Europe.
- The U.S. will have over 190 million online video users & nearly 70 million smart-TV households by 2017.
- More than 50% of U.S. broadband households have a connection between a TV and the Internet, and the average broadband user is watching 1.6 hours of video on a mobile phone each week.
- Over 40% of consumers (U.S. broadband households) receive personalized TV viewing recommendations from at least one source.
- 50% of consumers (U.S. broadband households) who receive personalized recommendations are willing to share their viewing history with friends or family in order to improve the recommendations.

CONNECTIONS™ Summit at CES examines the challenges and opportunities for the major players in this changing ecosystem. Parks Associates' research expertise includes digital media and platforms, entertainment and gaming, home networks, Internet and television services, digital health, mobile applications and services, support services, consumer apps, advanced advertising, consumer electronics, energy management, and home control systems and security.

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We hope you find the event to be valuable and welcome your feedback.

Sincerely,

Stuart Sikes

Stuart Sikes
President, Parks Associates

Please attend our upcoming events!

Smart Energy Summit: Engaging the Consumer
February 17-19, 2014, Austin, TX

CONNECTIONS™: The Premier Connected Home Conference
May 13-15, 2014, San Francisco, CA

Connected Health Summit: Engaging the Consumer
September 4-5, 2014, San Diego, CA

CONNECTIONS™ Europe
November 2014, Amsterdam, The Netherlands

2014 International CES
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Home Monitoring and Control: Attracting New Subscribers 9:15 - 10:30 AM

The growing ecosystem of connected products opens up many options for service providers but also creates challenges in design-ing and deploying services that will generate recurring revenue and improve customer loyalty. This session examines the business issues that confront service providers and how those issues will impact home control platforms.

As more connected devices enter the home, consumers will expect service providers to integrate these devices into their platforms. Yet numerous business issues must be resolved before the software development effort begins. In addition, the walled-garden strategy that service providers have chosen must eventually be opened.

Panelists from leading platform developers and service providers discuss the obstacles to move to an open-platform strategy.

Moderated by Tom Kerber, Director, Research, Home Controls & Energy, Parks Associates.

- Jim Johnson, Executive VP, General Manager, iControl Networks
- Benoît Joly, SVP Marketing and Smart Life, Technicolor
- Jay Kenny, Vice President, Marketing, Alarm.com
- Kevin Meagher, Vice President, Smart Home, Lowe's
- Kevin Petersen, President, AT&T Digital Life
- Adam Tichelaar, Director, Connected Home Solutions & Program, Amdocs

Consumer Tech Support: Advanced Tools and Infrastructure 10:30 - 11:45 AM

Support and solution providers are acquiring and developing soft-ware and solutions geared at automating the support process and improving the overall quality of technical support service delivery.

This panel analyzes emerging backend technologies that foster greater efficiencies in diagnostics, troubleshooting, and resolution as well as self-help tools and other aspects of service innovation in the tech support market.

Moderated by Patrice Samuels, Research Analyst, Parks Associates.

- Alan Atkins, VP & Global Head M2M, Wipro Technologies
- Manoj (Marc) Chandiramani, VP, Technical Solutions Group, Quatrro Global Services
- Frank Kouretas, VP Products and Marketing, Radialpoint
- James Morehead, VP - Product Mgmt & Corp. Marketing, Support.com, Inc.
- John Orcutt, CEO, Pie Digital
- Ratul Sengupta, VP, Technology Enabled Services & Platform Solutions, Sutherland Global Services

The Internet of Things: Connected Home Platforms and Devices 12:00 - 1:15 PM

Internet-enabled devices are now common in the home, and OEMs are developing connected home strategies through applications that extend functionality and add new features and benefits to controls, energy, security, and home management solutions.

Speakers discuss interoperability, the different approaches to integrating the numerous connected products into connected home platforms, and the standards & technologies that will simplify integration.

Moderated by Tom Kerber, Director, Research, Home Controls & Energy, Parks Associates.

- Shane Dyer, President, Arrayent, Inc.
- Derek Elder, Senior Vice President and General Manager, ARRIS Group
- David Foote, CTO, Hitachi
- Ashu Joshi, Product Manager Connected Life Solutions, Cisco
- Tobin Richardson, Chairman & CEO, ZigBee Alliance
- Mark Walters, Chairman, Z-Wave Alliance

Monetizing Second-screen Services 1:15 - 2:30 PM

Every consumer experience now has a mobile component, from video viewing to social interaction, and the smartphone or tablet is often the first screen consulted in these interactions.

This session addresses steps to improve the consumer experience, including the challenges in deploying and improving second-screen services, and how content owners, TV service providers, and advertisers can best monetize these services.

Moderated by Heather Way, Senior Analyst, Parks Associates.

- Eric Anderson, VP, Content and Product Solutions, Samsung
- Jason Forbes, EVP & Managing Director, Zeebox USA
- Adam J. Lowy, GM, Interactive & Advanced TV, DISH
- Ashwin Navin, CEO and Co-Founder, Samba TV
- Daniel Riddell, VP - Operations, SmartOTT | Wild TV
- Hardie Tankersley, VP Digital Product, Platforms, & Innovation, Fox Broadcasting

Evolution of the Smart TV 2:30 - 3:45 PM

The rise of the smart TV has disrupted the entire video ecosystem, and as penetration increases worldwide, the video industry must develop business plans that properly leverage this platform. This panel discusses the impact of smart TVs as a platform for digital content, discovery, and apps. Speakers address several recent trends, including UltraHD/4K, partnerships among service providers and device makers, and future challenges and opportunities.

Moderated by Barbara Kraus, Director of Research, Parks Associates.

- Richard Bullwinkle, Head of US Television Innovation, Samsung
- Michael Collette, CEO, Cognitive Networks
- John Honeycutt, Chief Operating Officer, Discovery Networks International, Discovery Communications
- Gaurav Shah, Vice President of Marketing for Digital Entertainment Business Unit, Marvell
- Wendell Wenjen, Director, Advertising and Interactive TV Platforms, LG Electronics
- Stephen White, President, Gracenote

New Connected CE Business Models 3:45 - 5 PM

Smart TVs, smartphones, game consoles, and other connected devices have new features and digital services that can deliver unique value to consumers and lead to greater profitability and improved competitive positioning for companies. This panel discusses emerging business models for connected devices, trends that are enabling these models, and uptake potential among consumers.

Moderated by Brett Sappington, Director of Research, Parks Associates.

- Mark Carroll, VP of Product Management, Qualcomm Atheros
- Mike Fitzsimmons, CEO, Delivery Agent
- Michael Hawkey, Vice President and General Manager, Sling Media
- Michael Lantz, CEO, Accedo
- Scott Rosenberg, VP Business Development, Roku

Reception 5:30 PM
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Lowe's

Lowe's has entered the Smart Home market with a broad range of innovative new connected products and services using their Iris platform. Iris allows consumers to monitor and control their home from their computer, tablet, or smart phone. The broad range of Iris products and services are designed to appeal to the average consumer with simple and affordable bundles that make homes safer, more energy efficient and convenient to manage. **www.lowes.com/iris**

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Alarm.com, founded in 2000, is the industry leading technology provider of interactive security, automation and energy management solutions. Through its proven technology platform and advanced wireless, mobile and web-based solutions, Alarm.com helps protect and empower over a million residential and commercial customers throughout North America. Alarm.com delivers interactive security, video monitoring, home automation and energy management to users exclusively through a network of thousands of licensed and authorized Dealer Partners. **www.alarm.com**

Amdocs

For more than 30 years, Amdocs has ensured service providers' success and embraced their biggest challenges. To win in the connected world, service providers rely on Amdocs to simplify the customer experience, harness the data explosion, stay ahead with new services and improve operational efficiency. The global company uniquely combines a market-leading BSS, OSS & network control product portfolio with value-driven professional services and managed services operations. With revenue of $3.2 billion in fiscal 2012, Amdocs and its 20,000 employees serve customers in more than 60 countries. **www.amdocs.com**

ARRIS

ARRIS is a premier video and broadband technology company that transforms how service providers worldwide deliver entertainment and communications without boundaries. Its powerful end-to-end platforms enable service and content providers to improve the way people connect – with each other and with their favorite content. The Company's vision and expertise continue to drive the industry's innovations, as they have for more than 60 years. Headquartered north of Atlanta, in Suwanee, Georgia, ARRIS has R&D, sales and support centers throughout the world. For more information: **www.arrisi.com**

AT&T Digital Life

AT&T Digital Life is a professionally monitored home security and home automation service that provides remote access and management capabilities, enabling consumers to stay connected to home from anywhere, anytime using their smartphone, tablet or PC. **www.att.com/DigitalLife**

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Cisco

Cisco is the longstanding market-leading supplier of video entertainment solutions for service providers. We are totally committed to helping our service provider partners deliver transformational video services. And with more than, 7500 video professionals on staff, Cisco is unique in having the scale, resources and breadth of vision to deliver differentiated solutions to our service provider partners.

The Videoscape Unity platform integrates Cisco cloud and network capabilities with an award-winning user experience and robust content protection. Using Cisco's ability to customize and integrate these components to clients' specific needs, Videoscape Unity empowers service providers in all markets.

To see what Videoscape Unity can offer your subscribers and how it can accelerate your business, visit www.cisco.com/go/videoscape.

Pie Digital

Pie Digital software fully equips Service Providers for the complexities and opportunities of connected homes. The comprehensive solution enables efficient high-quality support via full access inside the gateway—visibility, diagnostics, resolutions, and control. Pie Digital drives new revenue with the ability for Service Providers to sell products and services based on immediate user needs.

Pie software increases first call resolution, cuts and shortens support calls, lowers churn, and enables new revenue. A proven solution in Tier 1 carrier field trials, Pie software achieved outstanding user evaluations, high CSR satisfaction, and exceptional user self-service and response to alerts. http://piedigital.com

Radialpoint

Radialpoint helps large consumer technology brands realize their share of the growing revenue potential of the connected digital home. Our Digital Home Services solutions generate revenue and deepen customer relationships by simplifying technology and solving end-user frustrations. We bring a partner-led platform-based SaaS solution to market that combines our customers' assets and 3rd party software with our strategic and operational expertise to deliver end-to-end, monetized premium support. Some of the world's most successful service providers, OEM's and retailers are powered by Radialpoint generating nearly $1B in revenues to date and growing. Radialpoint is headquartered in Montreal, Canada with offices in the United States and Europe. www.radialpoint.com

SmartOTT

SmartOTT is a leader in Smart TV technology, transcoding solutions, and CE/HTML5 application development. SmartOTT enables content producers, media companies and TV operators to offer anytime content delivery to a range of consumer electronic and Smart TV devices.

SmartOTT's automated cloud-based platform ensures, speed, accessibility, and cost efficiency while managing your second screen content. SmartOTT is focused on making the most of your content and specializes in OTT monetization strategies including subscription based services and electronic sell through. SmartOTT integrates the latest technology and supports most CE platforms including LG, Sony, Sharp, Roku, Samsung, Panasonic, GoogleTV, Yahoo Connected TV, Foxxum & more. www.smartott.com

Technicolor

Technicolor is home to industry-leading creative and technology professionals committed to the creation, management and delivery of entertainment content to consumers around the world. Propelled by a culture of innovation and underpinned by a dedicated research organization, the company's thriving licensing business possesses an extensive intellectual property portfolio focused on imaging and sound technologies. Serving motion picture, television, and other media clients, the company is a leading provider of high-end visual effects, animation, and postproduction services. In support of network service providers and broadcasters globally, Technicolor ranks among the worlds' leading suppliers of digital content delivery services and home access devices, including set-top boxes and gateways. The company also remains a large physical media service provider, being one of the world's largest film processors and independent manufacturers and distributors of DVDs & Blu-ray™ discs. Euronext Paris: TCH.
www.technicolor.com

Z-Wave

Sigma Designs offers the Z-Wave® protocol, an interoperable wireless RF-based communications technology designed for control and status reading applications in residential and light commercial environments. Z-Wave® delivers reliable wireless networking at a fraction of the cost of other similar technologies, by focusing on narrow bandwidth applications and substituting costly hardware with innovative software solutions.

Z-Wave® transforms any stand-alone device into an intelligent network node that can be controlled and monitored wirelessly. Applications for Z-Wave® intelligence include home entertainment systems, lighting and appliance control, HVAC systems, security and access control, meter reading, and digital home health care. Z-Wave® brings increased comfort, convenience and safety to any home or business.
www.z-wave.com

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Quantitative Market Intelligence to Guide
Strategic Business Decisions

KEY BENEFITS

- Consumer Adoption and Segmentation
- Usage Patterns and Purchase Plans
- Emerging Trends in Technology and Services
- Revenue Strategies
- Market Analysis
- Gateways to Reaching the Mass Market
- New Business Opportunities
- Strategic Recommendations

RESEARCH CATEGORIES

- Access and Entertainment
- Connected CE and Platforms
- Connected Home Systems and Services
- Digital Health
- Digital Home Support Services
- Digital Media
- Home Energy Management
- Mobile and Portable

PARKS ASSOCIATES

Parks Associates surveys more than 30,000 consumers in the U.S. and around the world annually.

www.**PARKS**ANALYTICS.com

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- Evolution of Energy Markets

- The Dying Utility Business Model

- **New Business Models and Capabilities** for Home Controls

- Big Data and Analytics

- **Expanding Energy Management Solutions** through Connected Appliances and Thermostats

- **Consumer Engagement** Methods and Adoption **Success Stories** for the Smart Home

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Keynotes

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Erik Charlton
VP of Business, **Nest**

COMCAST

Bill Horrocks
VP, Product Management,
Xfinity Home, **Comcast**

AUSTIN ENERGY

Debbie Kimberly
VP of Distributed Energy
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The Expanding Market for the Connected Home

Over 60% of U.S. broadband households have at least one Internet-connected CE, such as a smart TV, connected Blu-ray player, or connected game console.

**Consumer use of these devices is evolving** and includes viewing video content from mobile platforms.

As a result, content providers are deploying new multi-screen services and streaming content to multiple devices.

The CE market is reaching a new equilibrium point where spending will hold steady, without the fluctuations typical of previous years. At the end of 2013, 53% of U.S. broadband households planned to spend roughly the same amount on CE products in this holiday season compared with 2012.

Use of Device for Video

"In the past 30 days, how many times have you watched video on a..."

U.S. Broadband Households

- Q4 2010
- Q1 2012
- Q1 2013

25%

0%

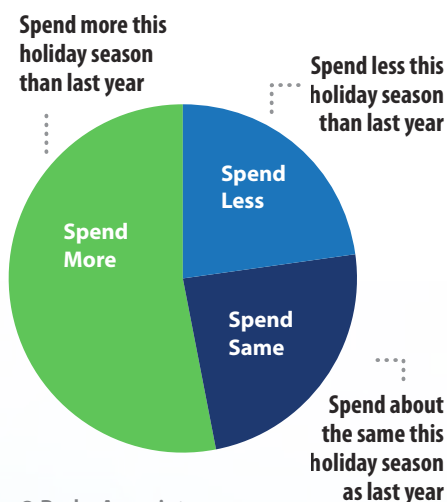TV set · Computer · Tablet · Mobile Phone
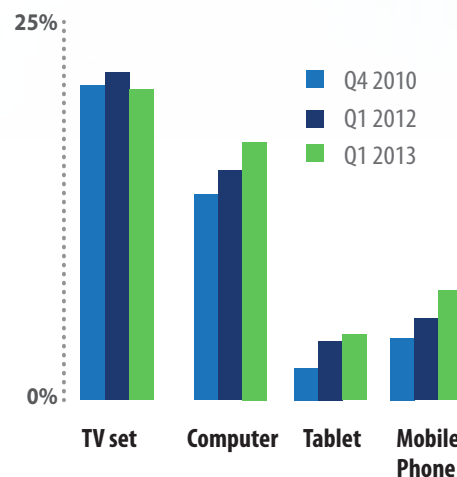
© Parks Associates

Changes in Household CE Spending

"Compared to last year, do you plan to spend more or less on holiday purchases?"

Among U.S. Broadband Households

Spend more this holiday season than last year

Spend less this holiday season than last year

Spend Less

Spend More

Spend Same

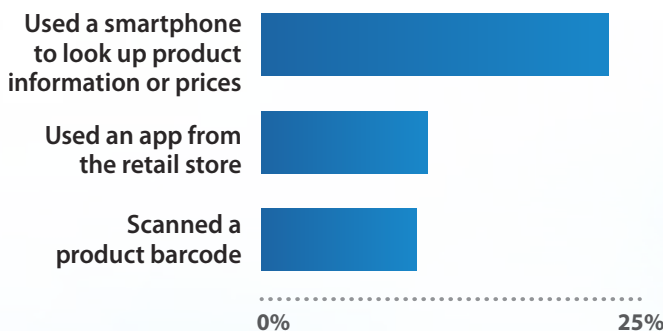Spend about the same this holiday season as last year

© Parks Associates

Consumers are also using these smart devices to be savvier CE shoppers. The smartphone in particular is an important tool, and nearly one in two smartphone owners planned to use their devices while holiday shopping, while 31% planned to use mobile apps for holiday shopping.

Use of Mobile Commerce Apps During Retail Purchases

CE Buyers in U.S. Broadband Households

Used a smartphone to look up product information or prices

Used an app from the retail store

Scanned a product barcode

0% · 25%

© Parks Associates

Consumer interest in smart home offerings is growing, and more and more companies are focused on a connected home strategy within their offerings.

When consumers in U.S. broadband households are presented with a variety of smart home features, ranging from energy management to monitoring and security…

50% show strong interest in 11 or more features.

These consumers want a comprehensive system with a wide range of capabilities, from remote smoke and fire alerts to remote control of a pet door.
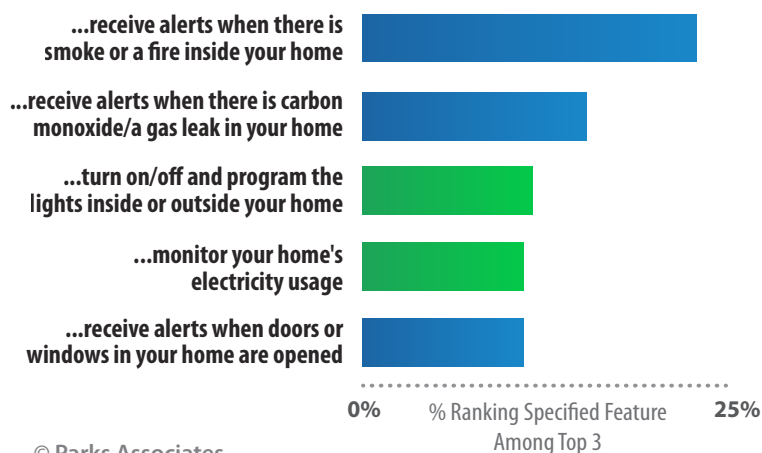
Total Number of Appealing Smart Home Features
U.S. Broadband Households

- 11+ features appealing
- No features appealing
- 1-5 features appealing
- 6-10 features appealing

© Parks Associates
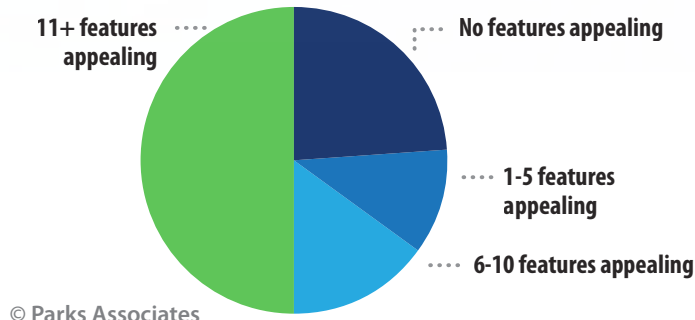
Safety is the top benefit desired in a smart home system.

Top 5 Important Smart Home Features
"Please rank the three capabilities that you find important to you."

- ...receive alerts when there is smoke or a fire inside your home
- ...receive alerts when there is carbon monoxide/a gas leak in your home
- ...turn on/off and program the lights inside or outside your home
- ...monitor your home's electricity usage
- ...receive alerts when doors or windows in your home are opened

0% — % Ranking Specified Feature Among Top 3 — 25%

© Parks Associates

Consumers consistently rate safety features, such as detectors for smoke, carbon monoxide, and gas leaks, as the most important elements in a smart home or security system.

Security capabilities and energy management capabilities rank marginally behind safety features, but they would fulfill an important role in enhancing the value proposition of a comprehensive smart home system.

Finding the right mix of pricing and features will be key to driving adoption, and there are a variety of new entrants in the smart home market, including security companies, telecom and cable operators, and retailers, that will deploy offerings in 2014.