



IHS MARKIT TECHNOLOGY INTELLIGENCE SERVICE

Smart Home (Standard & Premium Overview)

Helping you understand the main trends that drive the growth of smart home devices and services

FEATURED TOPICS

- Impact of voice assistants/smart speakers in the smart home
- Trackers for consumer video and thermostats by brand, technical specifications, technology type and MSRP
- Remote monitoring analysis: impact of interactive security vs. home automation
- Competitive analysis:
 - *Devices, platforms and service providers*
- Insurance provider and utility adoption
- Multifamily property manager use cases
- Premium version of service includes Smart Speaker Tracker

Market Insights

Frequent analyst commentary on product launches, market news and analysis.

Smart Speaker Tracker

Quarterly market share and growth tracker for Amazon, Google and Apple.

Reports

Annual topical reports addressing key focus areas with in-depth analysis on market and technology trends

Databases

Studies addressing key trends throughout the year

Subscribers of the Standard and Premium services will receive:

Smart Home Device Database – Updated bi-annually, this database offers a complete view of the smart home market by device type (revenue and shipments), *market shares* and installed base grouped by safety & security, climate control, consumer electronics, energy & water control and lighting control.

Smart Home Subscriber Database – This is the fourth edition of the world market for remote monitoring services. The previous edition was published in May 2016. Provides market shares, market sizes and forecasts for the number of smart home subscriptions in EMEA, Americas and Asia segmented by application and system provider. Residential connected accounts is further analyzed by interactive security vs. home automation. It is designed, as well, to quantify and analyze the market for actual smart home subscribers in conjunction with remote monitoring (traditional systems and light commercial).

Consumer Video Report – Examines the consumer and DIY standalone network cameras including market shares, storage type, resolution and power source.

Quarterly Reports– 4-6 topical reports that provide valuable strategic insight into the key themes influencing smart home deployments including (see p.2 for descriptions)

Reports:

Multifamily – This report assesses the opportunities and challenges for deploying smart home technology in multifamily dwellings and quantifies the market size for smart home device shipments as well as smart apartment penetration by major region.

Device Trackers – These trackers (consumer video, video doorbells and thermostats) aim to provide analysis by brand, technical specifications, and manufacturer's suggested retail price (MSRP).

Use Cases – This market brief analyzes 3 key vertical markets of insurance, utilities and builders/developers by describing the opportunities and challenges each vertical faces as well as the total addressable market for smart home device revenue for each vertical.

Smart Speakers Report – This report delivers a breakdown of the drivers, market players, and expected future direction of the Smart Speaker category, and which players are expected to prevail in the long run. A global shipment forecast for the category through 2023 is also provided.

Scorecards – This brief provides Scorecard evaluations of the top smart home players on criteria using concrete data and metrics, including direct feedback from buyers, vendor market share, market share momentum, financials, brand recognition, reputation for innovation, and other benchmarks. In our Scorecards, we classify vendors as leaders, established players, or challengers depending on their overall scores compared against the industry averages.

Connectivity – This market brief analyzes the various protocols being deployed in the smart home today. Quantitative and qualitative analysis will be provided by device category for the American, EMEA and Asian regions. Analysis only includes smart home devices such as lighting, security, life safety, consume electronics, energy, etc.

Smart Speaker Tracker (Smart Home Premium Subscribers Only)

Smart speakers are one of the fastest growing segments of the smart home market, as such, annual or bi-annual data is not enough to keep pace with the rapid changes.

This smart speaker tracker aims to provide *quarterly updates* in Excel and PowerPoint for the smart speaker market. Brands included in the tracker are: Amazon, Google and Apple. More than forty first and third party models of each brand are included, leading to the following takeaways:

- > Who the top players are by quarter
- > Which model/type of smart speaker is gaining most traction
- > Seasonal trends
- > Speakers with displays vs voice-only capabilities
- > 3rd Party vs 1st Party device growth
- > Segmented by revenues and unit shipments

Smart Home Device Database

Measures:

- Unit Shipments
- Installed Base

Coverage

- Americas
- Asia
- EMEA

Safety and Security:

- Garage Door Operators
- Hazard Detection
- Electronic Locks
- Video (Cameras, Video Door Bells)
- Intruder Alarms

Lighting and Controls:

- Lighting
- Plugs/Switches
- Blinds/Shades

Energy & Water:

- Irrigation
- Appliances
- Air Quality

Climate Control:

- Fans
- Radiator Valves
- Thermostats
- Air Conditioners

Consumer Electronics

- Smart Speakers
- Appliances
- Health/Fitness

Coverage

- Global

System Type

- Professional
- DIY
- Hybrid

Housing Type

- Multifamily
- Single-family

Route to Market

- MSO
- Security Provider
- Retail
- Builders
- Utilities

Network Controllers/Infrastructure

- Discrete Central Hub
- Integrated
 - STB including OTT
 - Gateways
 - / Routers
 - Televisions
 - Gaming Consoles
 - Smartphone/ Tablets/ Wearables

Residential Subscriber Database

Measures

- RMR
- Revenue
- Monitored accounts
- ARPU
- Market shares
- Subscribers

System providers

- Security provider
- MSO
- Pro monitor/DIY install
- Self-monitoring

Application

- Traditional monitoring
- Connected Monitoring
- Independent living (IL)

Coverage

- Americas
- Asia
- EMEA

System attach rates

- Video, lighting, (IL)

Consumer Video Report

Measures:

- Revenues
- unit shipments
- ASP

Coverage

- Americas
- Asia
- EMEA
- USA

Devices

- By System Type
- Analog Bundles
- Network Bundles
- HD CCTV bundles
- Standalone Network Cameras
- Portable Integrated Monitor Systems
- Discrete Sales of Equipment

Product Type

- Analog Security Cameras
- Network Security Cameras
- HD CCTV Security Cameras
- DVRs + HD CCTV Recorders
- Network Video Recording Hardware
- Video Management Software
- Accessories

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