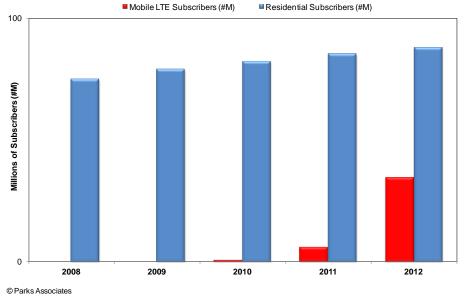


By Parks Associates Analysts

2Q 2013

Synopsis Broadband Subscribers Digital Lifestyles: U.S. Broadband Subscriptions U.S. provides analysis and ■ Mobile LTE Subscribers (#M) 100 forecasts for a variety of digital lifestyle product categories, including broadband Internet, Millions of Subscribers (#M) television services, digital content services, and connected home products, including home networks and connected consumer electronics.

(Millions of U.S. households and millions of mobile LTE subscribers)



Publish Date: 2Q 13

This report identifies the key business and technology trends in digital lifestyles market categories, measures consumer appetite for digital media and CE, and analyzes the historic and projected uptake of digital services and products.

Contents

Dashboard: Key Statistics

1.0 Report Summary

- 1.1 Purpose of the Report
- 1.2 Data Sources

2.0 Digital Lifestyles: A Summary of Trends

- 2.1 Access and Entertainment Services
 - 2.1.1 **Broadband Services**
 - Pay-TV Services 2.1.2
 - 2.1.3 Mobile Services and Devices
- 2.2 Digital Media
 - 2.2.1 Online Video
 - 2.2.2 Music
 - 2.2.3 Gaming
- 2.3 Connected CE and Platforms
- 2.4 Digital Health and Fitness
 - 2.4.1 Digital Health
 - 2.4.2 **Digital Fitness**
- 2.5 Connected Home Systems and Services
 - 2.5.1 Energy
 - 2.5.2 Security

© 2013 Parks Associates. All rights reserved.



By Parks Associates Analysts

2Q 2013

- 2.5.3 Connected Appliances
- 2.6 Consumer Tech Support
 - 2.6.1 Consumer Tech Support

3.0 Access and Entertainment Services

- 3.1 Broadband Services
 - 3.1.1 Growth of Services
 - 3.1.2 Fiber Services
 - 3.1.3 Broadband Speeds Increase
 - 3.1.4 Growth of Data Use
 - 3.1.5 Status of Cap and Tiered Services
 - 3.1.6 Rural Broadband
- 3.2 Pay-TV Services
 - 3.2.1 Growth
 - 3.2.2 Over-the-Top Competition
 - 3.2.3 Lower-cost Packages
 - 3.2.4 TV Everywhere
 - 3.2.5 A More Personalized TV Experience
 - 3.2.6 Pay-TV on Connected CE
 - 3.2.7 Second Screen Experiences
 - 3.2.8 A New Encoding Standard for Video
 - 3.2.9 Trends in Pay-TV Advertising
- 3.3 Mobile Services and Devices
 - 3.3.1 4G LTE Status
 - 3.3.2 Smartphones and Tablets
 - 3.3.3 Service Trends
 - 3.3.4 Mobile App Market Trends
 - 3.3.5 Mobile Payment
 - 3.3.6 Machine-to-Machine (M2M) Opportunities

4.0 Digital Media

- 4.1 Online Video
- 4.2 Digital Music
- 4.3 Gaming
 - 4.3.1 Console Gaming
 - 4.3.2 Trends in Online PC Gaming
 - 4.3.3 Trends in Mobile Gaming

5.0 Connected CE and Platforms

- 5.1 Consumer Electronics Purchases
- 5.2 Smart TVs
- 5.3 The Second Screen and "Pushing" Technologies
- 5.4 Digital Video Media Receivers

6.0 Digital Health and Fitness

- 6.1 Digital Health
- 6.2 Digital Fitness

7.0 Connected Home Systems and Services

- 7.1 Channel Convergence Inside the Connected Home
- 7.2 Utility Channel
- 7.3 Security Channel
- 7.4 The Broadband Service Provider Channel
- 7.5 Retailers
- 7.6 Which Channel Wins?

8.0 Consumer Tech Support



By Parks Associates Analysts

2Q 2013

8.1 Consumer Technical Support Services

9.0 Core Industry Forecasts

- 9.1 Access Services
- 9.2 Connected CE
- 9.3 Connected Home Management

10.0 Appendix

- 10.1 Glossary
- 10.2 Index

Figures

Top Ten Countries for Broadband

U.S. Residential and Mobile LTE Broadband Subscriptions

AT&T and Verizon FTTx Internet Subscribers Average Internet Connection Speed: U.S.

Consumer Internet Traffic, 2011-2016

Consumer Internet Traffic, by Type: North America

Broadband Adoption: Rural Households vs. the Nation

U.S. Pay-TV Subscribers

U.S. Households Relying Solely on OTT Video for TV

Notable Over-the-Top Television Alternatives

LTE Availability: U.S. Mobile Operators

U.S. Smartphone and Tablet Sales

Apple iPhone and iPad Unit Sales

Smartphone Operating System Market Share

Voice and Data Revenues: Top-Four U.S. Wireless Carriers

App Download Pattern by Device Platform

Apps Downloads - North America

Consumer Entertainment Spending: Box Office, DVD/Blu-ray, and Digital

U.S. Online Video Viewers: 2013-2017 Netflix and Hulu Plus Subscribers

U.S. Digital Music Market: Total Revenues

iTunes Song Downloads

North American Game Console Sales

Consumer Electronics Spending Plans

2012 Holiday CE Intentions and Purchases

2012 Annual Consumer Electronics Purchases: Desktops, Laptops,

Smartphones, and Tablets

Intel PC Group and AMD Computing Solutions Earnings

Smart TV Penetration

Sales of Apple TV and Roku

Digital Health Market Segmentation

Utility, Home Automation, and Security Service Business Models

Consumer Tech Support Services

Access Service Subscriptions

Unit Sales of Consumer Electronics

The Landscape of Home Security

A U.S. Forecast for Revenues from Traditional Security and Home Service Bundles



By Parks Associates Analysts

2Q 2013

Attributes

Parks Associates 15950 N. Dallas Parkway Suite 575 Dallas, TX 75248 800.727.5711 toll free 972.490.1113 phone 972.490.1133 fax

parksassociates.com sales@ parksassociates.com Authored by Parks Associates Analysts

Executive Editor: Tricia Parks Published by Parks Associates

© May 2013 Parks Associates Dallas, Texas 75248

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

Disclaimer

Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.