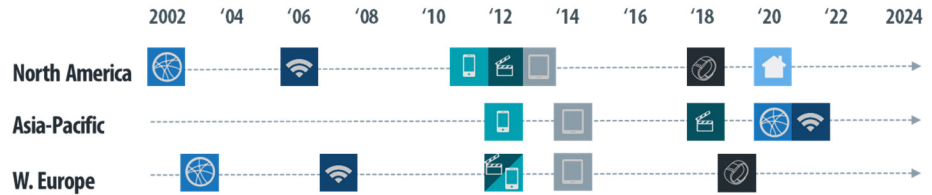


Synopsis

This report provides an analysis of global digital lifestyle trends in service categories, including broadband, television, digital content, and digital health, and connected home product categories, including home networks and connected consumer electronics. It includes five-year forecasts for select product categories.

Timeline

Timeline of the Connected Lifestyle



50% of households have... **INTERNET** **HIGH SPEED INTERNET**

50% of broadband households have at least one... **SMARTPHONE**

CONNECTED HOME ENTERTAINMENT DEVICE

TABLET

CONNECTED HEALTH / FITNESS DEVICE

SMART HOME DEVICE

Sources: 2002-2014: Multiple Parks Associates Consumer Surveys | 2020-2022: Parks Associates Analyst Estimates ©2015 Parks Associates

Publish Date: 1Q 15

“Innovation, new products and services, sufficient broadband performance, resolution of security and privacy concerns, and ease of use and management of connected devices and services are fueling continued growth in connected lifestyle solutions,” said Barbara Kraus, Director of Research, Parks Associates. “The connected lifestyle will be supported by the continued growth in connectivity across the globe. By the end of 2017, half of all broadband homes will be from the Asia-Pacific region.”

Contents

Dashboard

1.0 Report Summary

- 1.1 Purpose of Report
- 1.2 Scope of Report
- 1.3 Research Approach/Sources

2.0 Global Connected Living Overview

- 2.1 Timeline of the Connected Lifestyle
 - 2.1.1 Connected Device and Services Adoption
- 2.2 IoT Opportunities

3.0 Connectivity

- 3.1 Fixed Broadband
 - 3.1.1 “Very High Speed” Broadband Services Proliferate
 - 3.1.2 In-Home Broadband Performance Proves as Critical as To-Home Broadband Performance
 - 3.1.3 Wi-Fi Hotspots Become a Hot Area for Operator Competition
 - 3.1.4 Forecast for Fixed Broadband Services

3.2 Mobile Broadband

3.2.1 Forecast for Mobile Broadband Services

4.0 Connected Lifestyles: Product and Services Trends

4.1 Connected CE and Platforms

4.1.1 Growth Rate for Connection of CE Devices Flattens

4.1.2 User Experiences Becoming More Immersive

4.1.3 CE Makers Push 4K UHD

4.1.4 4K UHD TV Forecast

4.2 Entertainment Services

4.2.1 Expansion of OTT Service Offerings

4.2.2 Original and Exclusive Content Gains Legitimacy

4.2.3 Alternative Digital Video Outlets

4.2.4 Forecast for Online Video Viewers

4.3 The Smart Home

4.3.1 Smart Devices

Interoperability Increases in Importance as Device Diversity Rises

Consumers Increasingly Interested in Self-Installation

Device Data Enabling Creation of Value-Added Services

4.3.2 Energy Management

Advanced Energy Management Features are Driving Smart Thermostat Adoption

Utilities Enhance Energy Efficiency Campaigns

Consumers More Receptive to Smart Energy Services than Devices

4.3.3 Security

Smart Home Features Drive Growth of Professionally-Monitored Security Services

Cable and Telco Providers See Continued Growth

Self-Installation Becoming More Popular

4.3.4 Security Forecast

4.4 Connected Cars

4.4.1 Standardization Needed to Alleviate Market Fragmentation

4.4.2 Connected Car Platforms Adapted to New IoT Use Cases

4.4.3 The Rising Value of Connected Car Data

4.4.4 Apple and Google's Influence on the Connected Car Industry to Expand

4.5 Digital Health and Fitness

4.5.1 Health Care Industry Exploring Aggregation of Health-Related Data

4.5.2 Continuing Interest in Patient Portals

4.5.3 Health Big Data - From Lip Service to Experimentation

4.6 Wearables

4.6.1 Forecast for Wearable Device Sales

5.0 Implications and Recommendations

6.0 Appendix

6.1 Glossary

6.2 Index

Figures

The Connected Home Lifestyle
 Average Number of Smart Devices Owned by U.S. Broadband Household
 Timeline of the Connected Lifestyle
 Percent of Connected Streaming CE Devices
 Smart Home Privacy Concerns
 Projected Volume and Penetration of Broadband by Region (2015)
 Global Fixed-Line Broadband Households Forecast
 Global Mobile Broadband Forecast
 Percentage of U.S. BB HHs with a CE Device Connected to the Internet
 Increase in New CE Device Connections Among U.S. BB HH
 Broadband Households with Internet-Connected CE
 Penetration of Connected CE Devices
 4K UHD TV Unit Sales Forecast by Region
 OTT Subscriptions by Service (2012 - 2014)
 OTT Subscriptions (2013 – 2014)
 Pay-TV Subscriptions by Age Group
 Linear vs. Non-Linear Video Consumption on TV Sets
 Video Consumption by Platform
 Online Video Viewers by Region Forecast
 Smart Device Adoption as Part of a Home System
 Professionally-monitored Security System Adoption in the U.S.
 Professional Monitoring Service Provider
 Home Security Installation by Length of Ownership
 Professionally-monitored Security Services Forecast
 Connected Health Market Segments and Solutions
 Global Wearables Forecast

List of Companies

ABC	Kaiser Permanente
Amazon	Kickstarter
AMC Networks	KPN
Apple	Logitech
ArcSoft	Mayo Clinic
AT&T Drive	Mercedes
AT&T Mobility	Microsoft
Audi	Nest
CBS	Netatmo
Cerner	Netflix
Chevrolet	Numericable
China Mobile	Oracle
Com Hem	Orange
Cumulocity	PBS
Dailymotion	Samsung
Discovery Communications	Scripps Networks
Dish Network	Showtime
Disney	Sony
Epic	Sprint

Facebook	Subaru
Ferrari	Subbable
Ford	Tesla
GENIVI Alliance	T-Mobile
GM	Turner Broadcasting System
GoFundMe	Univision
Google	Verizon Wireless
HBO	Videotron
Honda	Vimeo
Honeywell	Volvo
Hulu Plus	WeightWatchers
Hyundai	Yahoo!
IBM	YouTube
Intel	

Attributes

Parks Associates
15950 N. Dallas Pkwy
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 Maia Hinkle, Glenn Hower, Tom Kerber, Barbara Kraus, Patrice Samuels, Brett Sappington, and Harry Wang
Executive Editor: Barbara Kraus
Published by Parks Associates

© March 2015 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.