

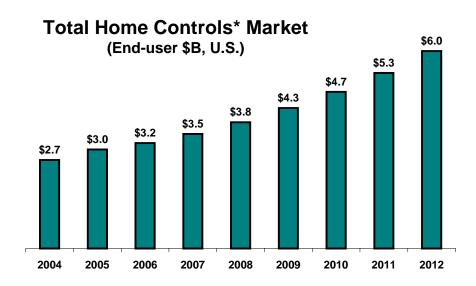
By Bill Ablondi, Director, Home Systems Research

2Q 2007

Synopsis

This report provides indepth analysis of the home controls market based on surveys and research of all principals in the home systems installation channel, including custom electronic systems designers / integrators, security systems integrators / installers, home builders, & consumers. It provides updated forecasts of unit sales and revenues for home controls, presented both in aggregate and in key segments including application, single-family vs. multifamily units, and new vs. existing

Market Value for Home Controllers: 2004-2012



Source: Home Systems: Home Controls Update © 2007 Parks Associates * Controller Hardware & Software Only; Excludes Installation Fees

Publish Date: June 07

homes.

"Activities like Best Buy's new ConnectedLife.Home package are setting the stage for broad-based adoption of connected home systems," said Bill Ablondi, director of home systems research for Parks Associates. "The market for home controls lacks consumer awareness, not technical capability, and the entry of high-profile companies, together with the increasing adoption of broadband and connected-entertainment services, will help overcome this hurdle."

Contents

The Bottom Line is a concise, executive-level summary of the current state of the market, evolutionary path, and the implications for companies doing business in this space.

A Parks Associates'
Resource Book
contains a wealth of
consumer survey data
and company profiles—
a must-have reference
for product/market
planning.

The Bottom Line

1.0 Notes on Methodology

- 1.1 Sources of Data
- 1.2 Definitions and Descriptions
- 1.2.1 Components of Home Control Systems
 - 1.2.2 Communication Protocols

2.0 Current State of the Home Controls Market

- 2.1 Adoption of Home Controls
- 2.2 Industry Structure and Key Participants
- 2.2.1 Technology Providers and Enablers

Echelon

Lagotek

SmartLAbs

UPB

XanBoo

Yitran

Zensys

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2.2.2 System and Device Manufacturers

Examples of Low Cost Systems Manufacturers

Intermatic

Lagotek

Logictech

SmartLabs

Selected High-end manufacturers

AMX

Clipsal

Control4

Crestron

Lutron

Vantage

2.2.3 PC-based Software System Integrators

Exceptional Innovation

Homeseer

Superna

2.2.4 Home Systems Conglomerates

D&M Holdings

Duchossois

Legrand

Nortek

Linear

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ADI

AVAD

D+H

Worthington

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- 4.1 Summary
- 4.2 Energy Management
- 4.3 Entertainment
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For: Control System Manufacturers

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PC-based Software System Integrators

Home Networking System Providers

Service Providers

Security System Providers



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Resource Book

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Web Services for Devices

Wireless Protocols and Standards

Infrared

 $\mathsf{INSTEON}^\mathsf{TM}$

RadioLink

RadioRA®

ZigBee

Z-Wave

Power Line Protocols and Standards

HomePlug

Insteon™

LonWorks™

Universal Powerline Bus

X-10

Other

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Control Systems Manufacturers

Advanced Control Technologies

AMX

CentraLite Systems

Colorado vNet

Control4

Cooper Wiring Devices

Crestron

Home Automation Inc. (HAI)

iControl Networks

Intermatic

Leviton Manufacturing Company

LiteTouch

Lutron Electronics Company

Powerline Control Systems (PCS)

Remote Technologies, Inc. (RTI)

Savant Systems LLC

SmartLabs, Inc.

Square D Clipsal

Vantage Controls

X-10 Ltd

Audio/Video Manufacturers



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ELAN Home Systems NetStreams LLC Niles Audio Corporation Russound

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Basic Controller Methodology

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Legrand

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Forecast of Market Value of Central Control Systems Sold in New Family Residences

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Resource Book

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