

The INTERCONNECTED Home

Energy, Entertainment, Information

The move to Interoperability



The INTERCONNECTED Home

- Part A** A Taxonomy and Market Sizing
- Part B** Household Energy Consumption in Aus
- Part C** Consumer Attitudes and Behaviour
- Part D** Interoperability
- Part E** Megatrends and Future Directions

5000 Respondents

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The Interconnected Home

The Connected Home. The Intelligent Home. The Smart Home. The Wired Home. The Energy Efficient Home. It's got a lot of names – but **what is it?**

The Home of the 21st century is evolving into a vastly different home than the simple 20th century dwelling where most of us grew up. More than two thirds of Australian homes are on broadband – and the NBN will vastly increase the number, and the bandwidth. Digital TV is a reality, with analogue being switched off all around the country. The Smart Grid means electricity distribution is becoming intelligent – consumers can feed back into the grid, and smart meters and time of use tariffs are changing the way households monitor and manage electricity.

Our communications systems and our entertainment systems are all digital. So are home automation and residential energy management systems. It is becoming difficult to view these systems in isolation from each other. They are increasingly becoming integrated. The fully connected home is not quite here yet, but it is coming soon – to a street near you.

What does it all mean? How will these changes shape your company's market strategies? Which are the important trends, and which are transitory?

Connection Research's major new research project, ***The Interconnected Home in 2011***, will help you find the answers to these questions. The report uniquely combines consumer research, industry analysis and market modelling to build a multi-dimensional picture of the home of the future – a future that is upon us now.

Digital technology is nothing new. Nor is home automation, nor home computers, nor flat screen TVs, nor solar energy. What is new is the way all of these technologies – and others – are interconnecting. Separate industries – consumer electronics, IT, energy distribution, communications – are coming together. Their increased integration is causing seismic shifts in both the supplier and consumer communities.

The Interconnected Home in 2011 is the first research project in Australia to explore these important issues.

RESEARCH TOPICS

Part A

The Interconnected Home

An overview of all electronic and electrical devices and energy sources in use in Australian households. Total number of devices, penetration rates, growth rates and usage patterns.

- ◆ Digital Entertainment Devices
- ◆ Mobile Devices
- ◆ Computers
- ◆ Communications
- ◆ Whitegoods
- ◆ HVAC & Pools
- ◆ Residential Energy Management
- ◆ Home Automation
- ◆ Non-electrical

Part B

Household Energy Consumption

An overview of energy usage of all above devices and technologies. All devices and their energy consumption broken down by

- ◆ Household (family) type
- ◆ Geography (65 ABS Statistical Regions)
- ◆ Household Income
- ◆ Household Ownership (own/rent)

Energy Consumption measured by

- ◆ kWh (kilowatt hrs)
- ◆ Cost of Electricity
- ◆ Co2e Emissions

This data is modelled out across all of Australia's 8.5 million households to build a Residential Energy Atlas.

PART C

Consumer Attitudes and Behaviour

- ◆ Factors when purchasing products (knowledge, affordability, portability, etc)

- ◆ Information Sources
- ◆ Consumer knowledge of future products and technologies
- ◆ Propensity to purchase, upgrade, replace old for new
- ◆ Brand Awareness

The full consumer survey will be developed in cooperation with subscribers to the research project

Part D

Interoperability

There are many different standards for connectivity and interoperability developed in Australia and internationally, and many issues as yet unresolved.

- ◆ Cabling and Wiring Standards
- ◆ Digital Living Network Alliance (DLNA)
- ◆ Open systems for residential connectivity
- ◆ Home Automation standards
- ◆ Wired v Wireless?
- ◆ Smart Meter, IHD and HAM standards and interoperability
- ◆ NBN/FTTP

Part E

Megatrends and Future Directions

The interconnected home is being driven by a number of key 'megatrends' in technology and society. An understanding of these issues is critical to any analysis of where we are headed.

- ◆ Bandwidth—the real meaning of the NBN
- ◆ The telehealth revolution
- ◆ The three screens—TV, PC, Smartphone. Content consumption patterns
- ◆ The changing media landscape
- ◆ Mobile Me—The changing face of consumer electronics
- ◆ The Demographic Shift—The smart home and smart aging
- ◆ The 'Internet of Things' - the move to pervasive computing

Methodology

The report will combine three complementary research methodologies:

1. Primary Research: Consumer Survey
2. Secondary Research: Industry Analysis
3. Market Modelling

Primary Research: Consumer Survey

Email survey of at least 5000 representative Australian households, weighted according to ABS demographics. Sponsors of the analysis can (for an additional fee) request additional data sets for required regions of interest. This can increase the total number of respondents from your dedicated state or preferred target region.

(Part A, C)

Secondary Research: Industry Analysis

There is a large amount of literature and existing research and data on the subject. Connection Research will draw on this information where relevant. This will include:

- ◆ ABS reports
- ◆ Competitive market analysis
- ◆ Vendor research
- ◆ Detailed interviews with industry figures
- ◆ International market analysis

(Part D, E)

Market Modelling

The primary and secondary research will be combined to develop a detailed market model, based on Connection Research's existing Digital Atlas of Australia, of device ownership and energy consumption across Australia's 8.5 million households.

(Part A, B)

The Interconnected Home

Return On Investment

The Interconnected Home is the first report release under the Intelligent Consumption service pillar. Below is an outline of the return on investment associated with purchasing The Interconnected Home and subscribing to the Intelligent Consumption research service.

- ◆ Align with your own segmentation model/s
- ◆ Determine strategies to engage with customer segments and develop drivers to assist with customer retention and loyalty
- ◆ Understand energy and its impact on residential and business segments
- ◆ Track and forecast changing attitudes, actions and trends
- ◆ Monitor device integration to the home and business
- ◆ Develop market share determinants
- ◆ Define consumer drivers and inhibitors
- ◆ Develop custom outcomes
- ◆ Multi dimensional consumer information can be leveraged to identify and isolate consumer characteristics that are highly correlated with targeted outcomes
- ◆ Measure the impact of external variables such as policy and government on your key segments
- ◆ Establish customer development and management roadmaps
- ◆ Guide and prioritise research and product development based on actual real time data
- ◆ Tailor products, value proposition, pricing, channel and message based on market research outcomes
- ◆ Develop report content in alignment with custom market research requirements

Order Form

Intelligent Consumption 12 month subscription

12 month subscription including 2 x primary market research reports:

1. The Interconnected Home (5000 Residential targets)
2. The Interconnected Office (2000 Business targets)

+ 20 market research notes (8-10 pgs)

+ e-mail monthly Smart Energy newsletter

SPECIAL BONUS 1 Question included in The Interconnected Home

+ Additional Custom Research Note on results **\$14.3k inc gst**

The Interconnected Home Silver Sponsor

12 month subscription to Intelligent Consumption +

2 Questions included in The Interconnected Home survey +

2 x Custom Research Notes **\$16.5k inc gst**

The Interconnected Home Gold Sponsor

12 month subscription to Intelligent Consumption +

4 Questions included in The Interconnected Home survey + Custom Report +

Branding + Advertising Banner External Executive Briefing **\$27.5k inc gst**

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Payment Method (Please Select)

Cheque Invoice Credit Card

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