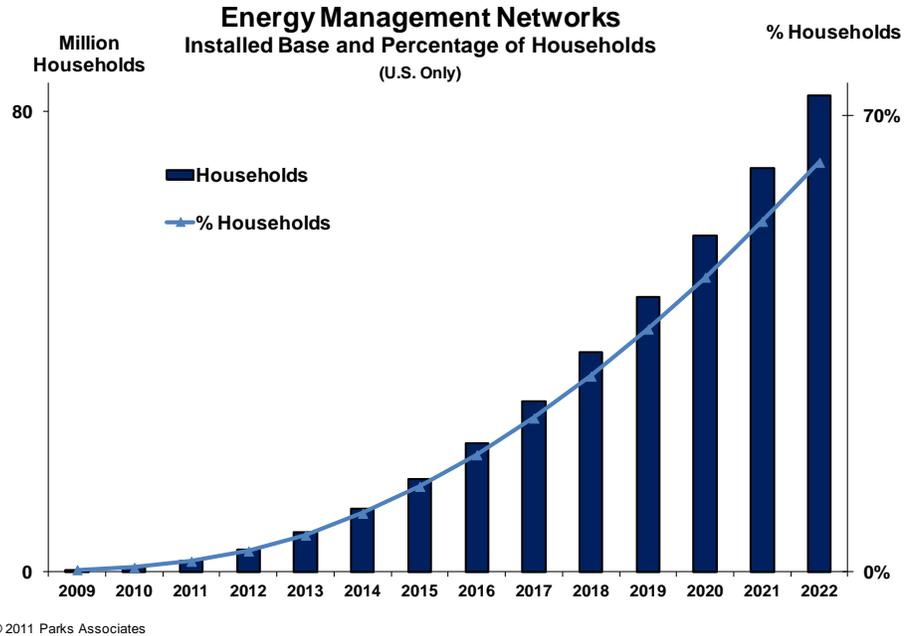


Synopsis

This report covers the changing landscape of technologies and services, including detailed analysis of the key drivers and market dynamics.

Insights from Parks Associates' extensive consumer data are applied to describe the business models for utilities, telcos, security service firms, and retailers and the future opportunities in the energy management market.

Household Forecast for Energy Management Networks



Publish Date: 4Q 11

"Winners in this market will have a clear vision of the future and a detailed understanding of the market in order to create a plan that exploits and expands their competitive advantage," said Tom Kerber, Director of Research, Home Controls and Energy at Parks Associates. "This report provides industry leaders with insights and a clear explanation of current and future market dynamics and competitive intelligence to help them be successful."

Contents

The Bottom Line

1.0 Introduction

- 1.1 Key Questions & Issues Addressed
- 1.2 Scope

2.0 Key Drivers of IP Based Residential Energy Management

- 2.1 The Benefits of Smart Meter Data
- 2.2 Broadband Enabled Product Capabilities
- 2.3 The Benefits of Real Time Control
- 2.4 IP Based Communication Standards

3.0 Market Dynamics

- 3.1 Consumer Mindset and Motivation
- 3.2 Telephone, Cable, Security Company Entrants
- 3.3 Partnership Opportunities
- 3.4 OEM Integration of Energy Management into Appliances
- 3.5 Retail

4.0 Company Profiles

5.0 Energy Management Value Chains and Business Models

- 5.1 Hardware Sales
- 5.2 Recurring Revenue from the Consumer
- 5.3 Recurring Revenue from Demand Response
- 5.4 Recurring Revenue from Advertising, Lead generation

6.0 Market Forecasts

- 6.1 Homes with Energy Management Systems
- 6.2 Subscription Revenue for Energy Management Services
- 6.3 In-Home Displays
- 6.4 Programmable Communicating Thermostats
- 6.5 Load Control Modules

7.0 Notes on Methodology

- 7.1 Data Sources

Index

Figures

- Smart Meter Deployments
- Utility Industry Net Promoter Score
- Residential Broadband Connections
- Marketing Funnel – The Consumer Decision Process
- Familiarity of Energy Programs Offered by Utility
- Consumer Attitudes Regarding Energy Programs
- Consumer Concerns or Objections to Energy Management
- Appeal of Value Added Services
- Likelihood to Switch Broadband Provider for Bundle
- Preferred Provider of Energy Management
- Preferred Energy Solutions Purchase Location
- Participants Entering the Smart Grid Market
- Home Control Platform Profiles
- Service Provider Profiles
- Quintuple Play Provider Profiles
- Thermostat and Energy Modeling Profiles
- Load Monitoring and Control, Demand Response Solutions Provider Profiles
- Smart Meter and Communications Solutions Manufacturers
- Household Penetration of Security, Broadband, and Smart Meters
- Forecast for Energy Management System Adoption
- Revenue from Consumer Subscriptions to Energy Management Services
- Forecast for In-Home Displays
- Forecast for Programmable Communicating Thermostats
- Forecast of Load Control Modules

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 Tom Kerber
Executive Editor: Tricia Parks
Published by Parks Associates

© December 2011 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.