

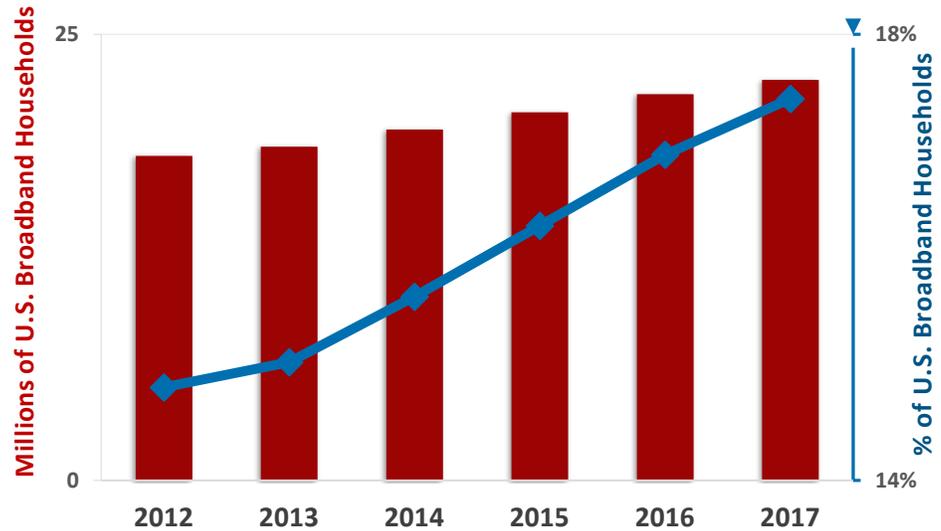
Synopsis

The New Face of Home Security analyzes changes to the home security industry compared to five years ago and posits continuing change for five years hence. The analyses include changes to products and services, distribution channels, and players and positions, including broadband service providers.

Forecasts are updated with notes explaining any changes and presents Parks Associates' view of the optimal approach to targeting consumers for now through 2015.

Security Revenues In Millions and % of U.S. Households

Fee-based Monitored Security Systems in U.S. Broadband Households



© Parks Associates

Publish Date: 4Q 13

"New players abound, each seeing an opportunity for new business from the expansion of security from primarily a burglar alert to a smart home system having multiple daily benefits," said Tricia Parks, CEO. "The players bring different strategies and new ideas. Results will be profound, but like most important infrastructure developments, visible progress will take time."

Contents

Data Points

The Bottom Line

Residential Security Dashboard

1.0 Report Summary

- 1.1 Purpose of the Report
- 1.2 Scope of the Report
- 1.3 Data Sources

2.0 Trends and History for Residential Security

- 2.1 History and Trends for the Coming Years
- 2.2 Current Industry Status and Trends

3.0 US Residential Security 2013

- 3.1 Market Status
- 3.2 Where are the Security Systems?

4.0 Who Has and Wants Security Systems

- 4.1 Householders with Security Systems
- 4.2 Householders with Intentions to Adopt Security

5.0 The Changing Security Industry

- 5.1 Rankings for Traditional Security System Firms
- 5.2 The Broadband Service Provider Security Numbers
- 5.3 The Role of Smart Home for Security
 - 5.3.1 Attrition: Strategies for its Reduction
 - 5.3.2 Improving and Evolving the Value Proposition
 - 5.3.3 The Appeal of Greenfields and New Players
 - 5.3.4 Smart Home – At the Beginning
 - 5.3.5 The Security Dealer Perspective

6.0 Selected Provider Profiles

7.0 Residential Security Forecasts

8.0 Recommendations

9.0 Glossary

Figures

- Selected Companies and Types of Companies Researched or Interviews
- Conceptual Timeline for Residential Security
- New Housing Starts 1960 - 2013
- New and Existing Home Sales 1994-2011
- Security Systems in US Broadband Households
- US Home Health Service Opportunities
- Images of Popular Security Touchscreens
- Security Systems in Owned Broadband Households 2013
- Where are Security Systems in US Broadband Households?
- Adoption of Housing by Rural, Suburban and Urban Housing
- The Impact of Home Size on Security System Adoption
- Security System Adoption by Region
- Diverse Home Values by Metro Areas
- Security Adoption in Owned Home by Household Income
- Demographics of Homeowners with and without Security Systems
- Comparing Tech Product Ownership between Security and Non-security Households
- Monitor and Control of Security System by Length of Ownership
- High Intentions to Adopt Security in the Next 12 Months
- High Intentions for Security Adoption by Intent to Move
- Selected Announcements for Smart Home, including Security
- SDM 100 Top 15
- Share Reported for Security Providers among Homeowners with Broadband and Monitored security
- Professional Monitoring Providers in US BB HHs
- Security System Estimates for Broadband Service Providers
- Professional Monitoring Rates in Owned Homes by Length of Security System Ownership
- % of All Security Systems by Length of Ownership and by % of All BB HHs
- Images of AT&T Digital Life and ADT Pulse
- Typical Security with Smart Home Offerings from Broadband Service Providers.
- A Stepladder of Increasing Capabilities for Smart Home
- Future Capabilities for Smart Home
- Percentage of Security Dealers by Revenues

Security Dealer Revenue Expectations for 2013
 The Percentage of Security Dealers Selling Security Systems with Smart Home Components
 Security Dealer Expectations for Remote Monitoring and Control Components
 Top Reasons Security Dealers Offer Remote Monitoring and Control
 Selected Profiles
 Flowchart for Security System Forecast
 Forecasting Security Industry Revenues
 Security Systems in US Broadband Households 2013
 Total New Security Systems Sales, Including Replacements
 Fee-Based Monitored Security in US BB HHs (2012-2017)
 Fee-based Monitored Security Systems
 Cumulative Sales of Smart Home Controllers with Security Systems 2012-2017
 Total Revenues for Residential Security and Monitoring
 Service Provider Revenue Options

Attributes	
<p>Parks Associates 15950 N. Dallas Pkwy Suite 575 Dallas, TX 75248 800.727.5711 toll free 972.490.1113 phone 972.490.1133 fax</p> <p>parksassociates.com sales@ parksassociates.com</p>	<p>Authored by Tricia Parks Executive Editor: Tricia Parks Published by Parks Associates</p> <p>© November 2013 Parks Associates Dallas, Texas 75248</p> <p>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.</p> <p>Printed in the United States of America</p> <p>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.</p>