Smart Home στην Εποχή του IoT

Do's & Don'ts στην Ελληνική Πραγματικότητα

ΕΙΣΗΓΗΤΗΣ:ΒΑΣΙΛΗΣ ΝΤΑΚΟΥΡΗΣ - ΔΙΕΥΘΥΝΤΗΣ ΑΝΑΠΤΥΞΗΣ

LIVING ROOM

Temperature

28°

Humidity 32%

20° from 00:00 to 8:00
24° from 08:00 to 00:00

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Ας ξεκινήσουμε με τον ορισμό.
Τελικά τι είναι το Smart Home;

Home automation or smart home (also known as domotics) is building automation for the home. It involves the control and automation of lighting, heating (such as smart thermostats), ventilation, air conditioning (HVAC), and security, as well as home appliances such as washer/dryers, ovens or refrigerators/freezers. Wi-Fi is often used for remote monitoring and control. Home devices, when remotely monitored and controlled via the Internet, are an important constituent of the Internet of Things. Modern systems generally consist of switches and sensors connected to a central hub sometimes called a "gateway" from which the system is controlled with a user interface that is interacted either with a wall-mounted terminal, mobile phone software, tablet computer or a web interface, often but not always via Internet cloud services.

While there are many competing vendors, there are very few worldwide accepted industry standards and the smart home space is heavily fragmented. Popular communications protocol for products include X10, Ethernet, RS-485, 6LoWPAN, Bluetooth LE (BLE), ZigBee and Z-Wave, or other proprietary protocols all of which are incompatible with each other. Manufacturers often prevent independent implementations by withholding documentation and by litigation. The home automation market was worth US$5.77 billion in 2015, predicted to have a market value over US$10 billion by the year 2020.

Είναι αυτό;
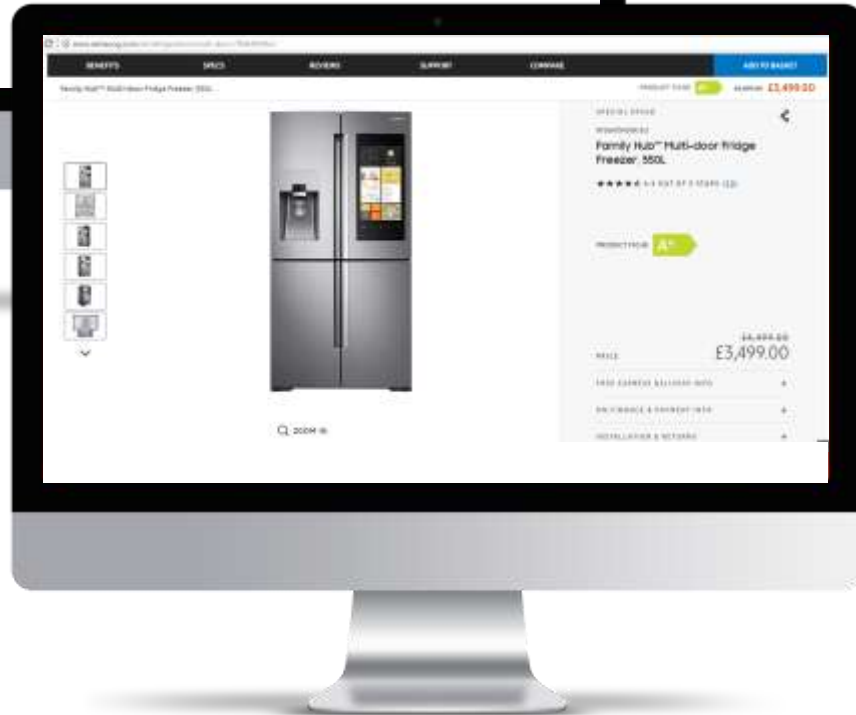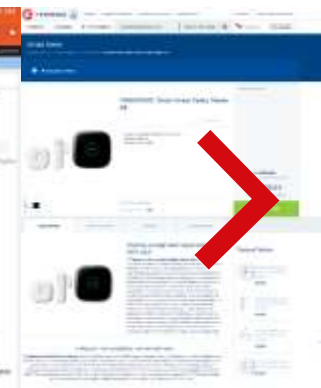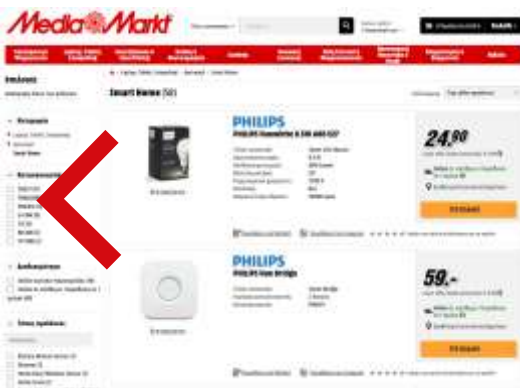
Ή μήπως αυτό;

Και έχουμε όλοι, παντού, την ίδια ιδέα για το τι είναι;

Έτσι λοιπόν τίθεται το ερώτημα:

To Sm@rthome or not to Sm@rthome? | Και τι είναι για εμάς το Smart Home?
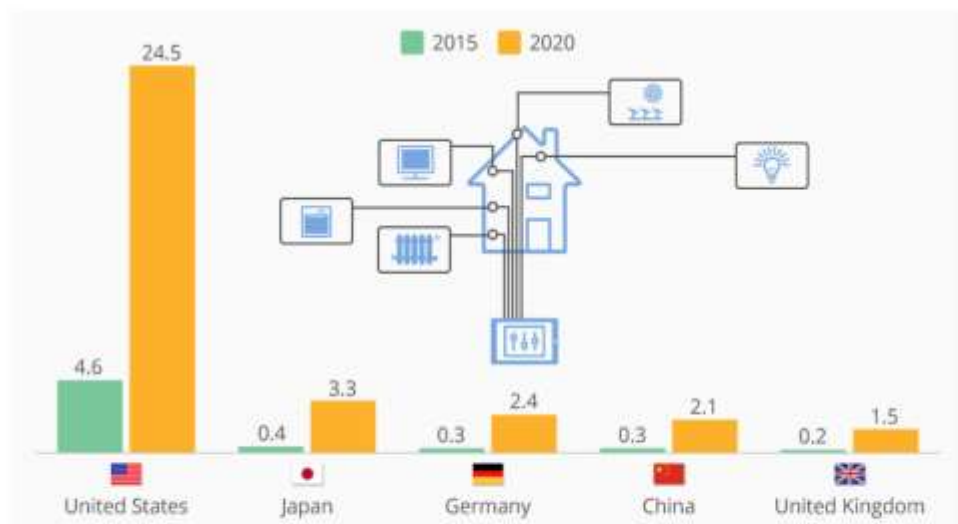
ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Οι εγχώριες προσπάθειες...

Οι **διεθνείς** τάσεις...

Το διάγραμμα δείχνει τον εκτιμώμενο αριθμό των έξυπνων σπιτιών σε εκατομμύρια στις πέντε μεγαλύτερες αγορές της Smart Home τεχνολογίας και την πρόβλεψη για το 2020

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Ποσόστωση κατηγοριών.
And the winner is ...
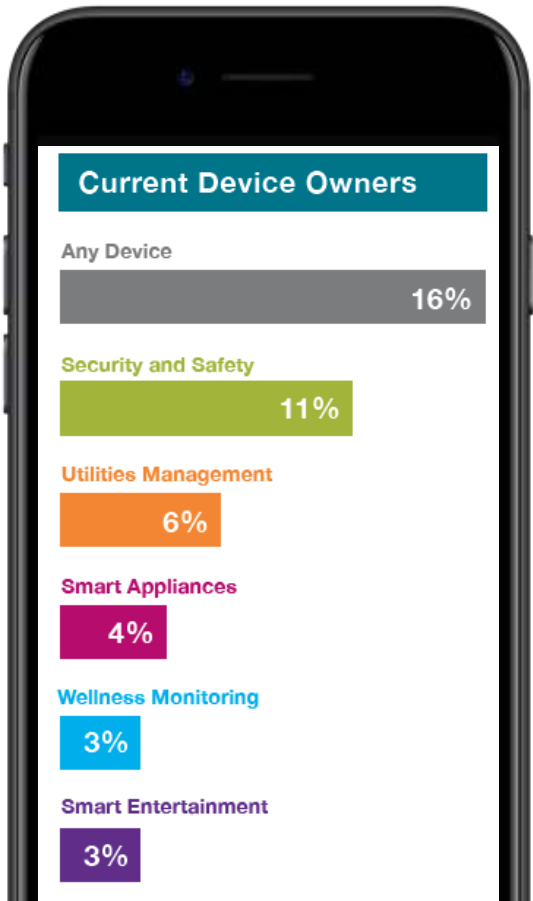
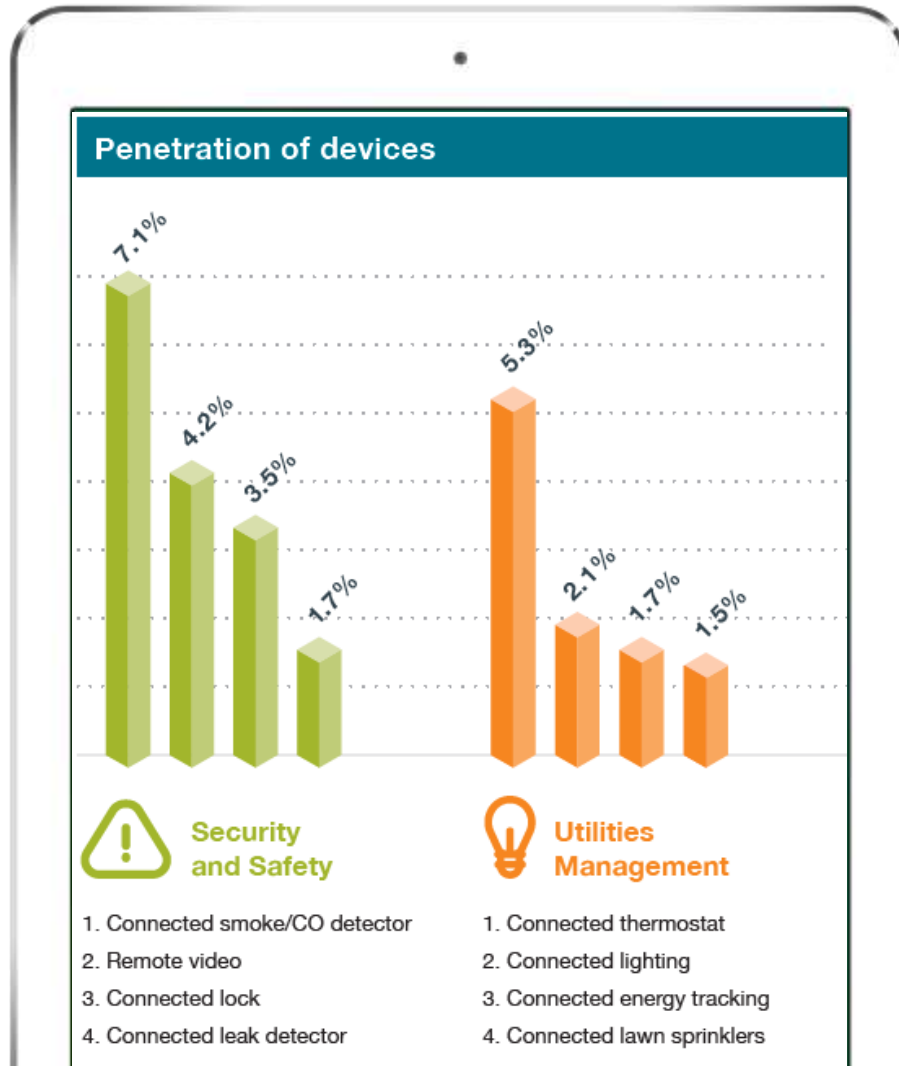Και τι πήραν; Security & Safety σχεδόν όλοι.
Energy tracking μόνο 1,7%...

Αγόρασαν όχι
από εμάς...

Where Users Purchase Their Devices (Retailers)

SECURITY AND SAFETY | UTILITIES MANAGEMENT | WELLNESS MONITORING

Home improvement retailer — 32 39 3
Online retailer — 22 21 29
Big box store — 8 14 23
Health care provider — 0 0 21
Home electronics retailer — 11 7 7
Specialty dealer — 10 3 4
Product manufacturer — 6 7 2
Home appliance retailer — 7 3 2

Current Device Owners

Any Device — 16%
Security and Safety — 11%
Utilities Management — 6%
Smart Appliances — 4%
Wellness Monitoring — 3%
Smart Entertainment — 3%

Penetration of devices

7.1% 4.2% 3.5% 1.7%
5.3% 2.1% 1.7% 1.5%

Security and Safety
1. Connected smoke/CO detector
2. Remote video
3. Connected lock
4. Connected leak detector

Utilities Management
1. Connected thermostat
2. Connected lighting
3. Connected energy tracking
4. Connected lawn sprinklers
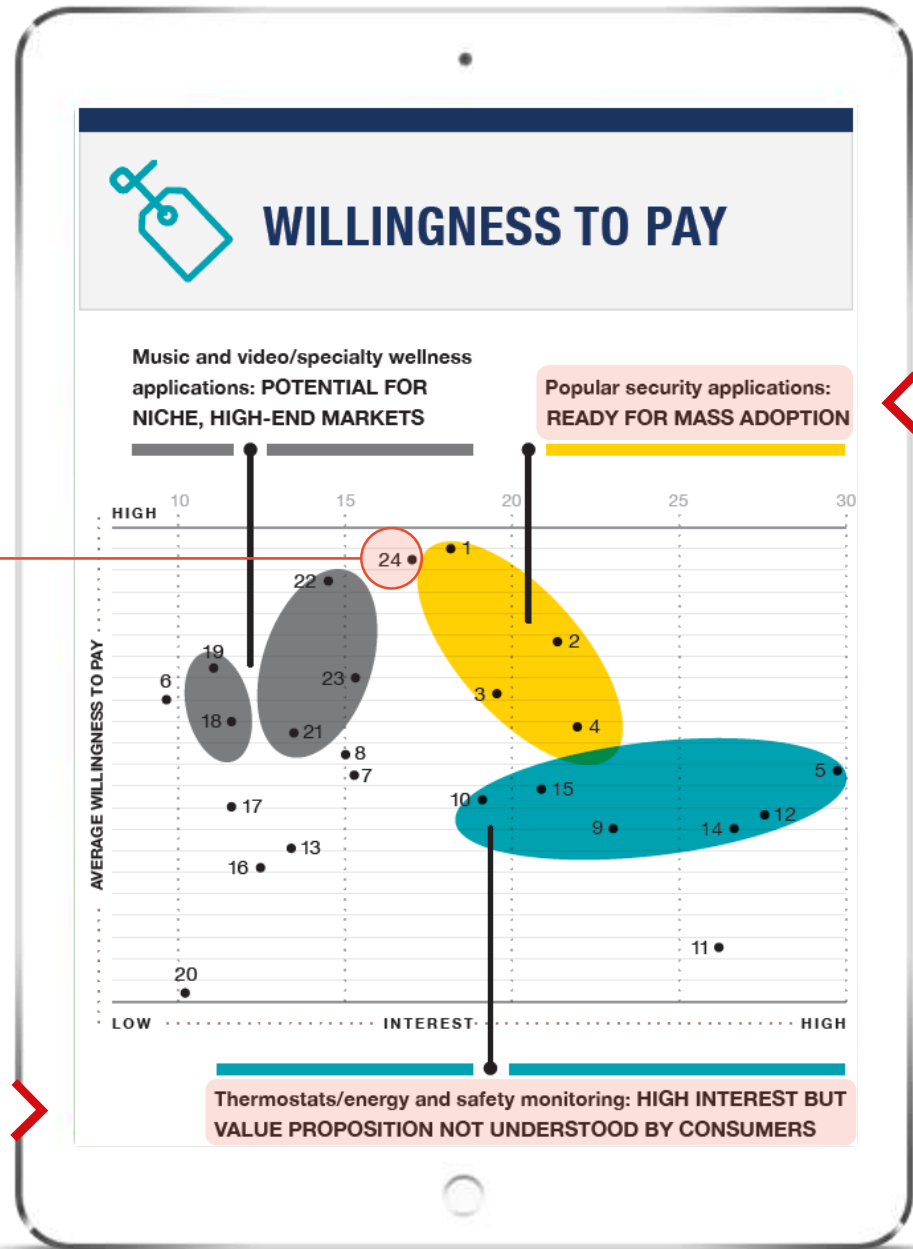
Οι λόγοι για τους οποίους οι έξυπνες συσκευές δεν πουλάνε στην Ελλάδα...

Να και το Hub...

Premium προϊόντα, σε κακές εποχές...

WILLINGNESS TO PAY

Music and video/specialty wellness applications: POTENTIAL FOR NICHE, HIGH-END MARKETS

Popular security applications: READY FOR MASS ADOPTION

Thermostats/energy and safety monitoring: HIGH INTEREST BUT VALUE PROPOSITION NOT UNDERSTOOD BY CONSUMERS

Safety and Security
1. Roving camera
2. Remote video feed
3. Auto-door locks
4. Remote door locks
5. Smoke/CO detector
6. Selective entrance
7. Remote window shades
8. Door phones
9. Leak detector

Utilities Management
10. Personalized thermostat
11. Smart lights
12. Auto-adjusting thermostat
13. Lawn sprinklers
14. Energy monitor
15. Learning thermostat

Wellness Monitoring
16. Connected scale
17. Smart health monitor
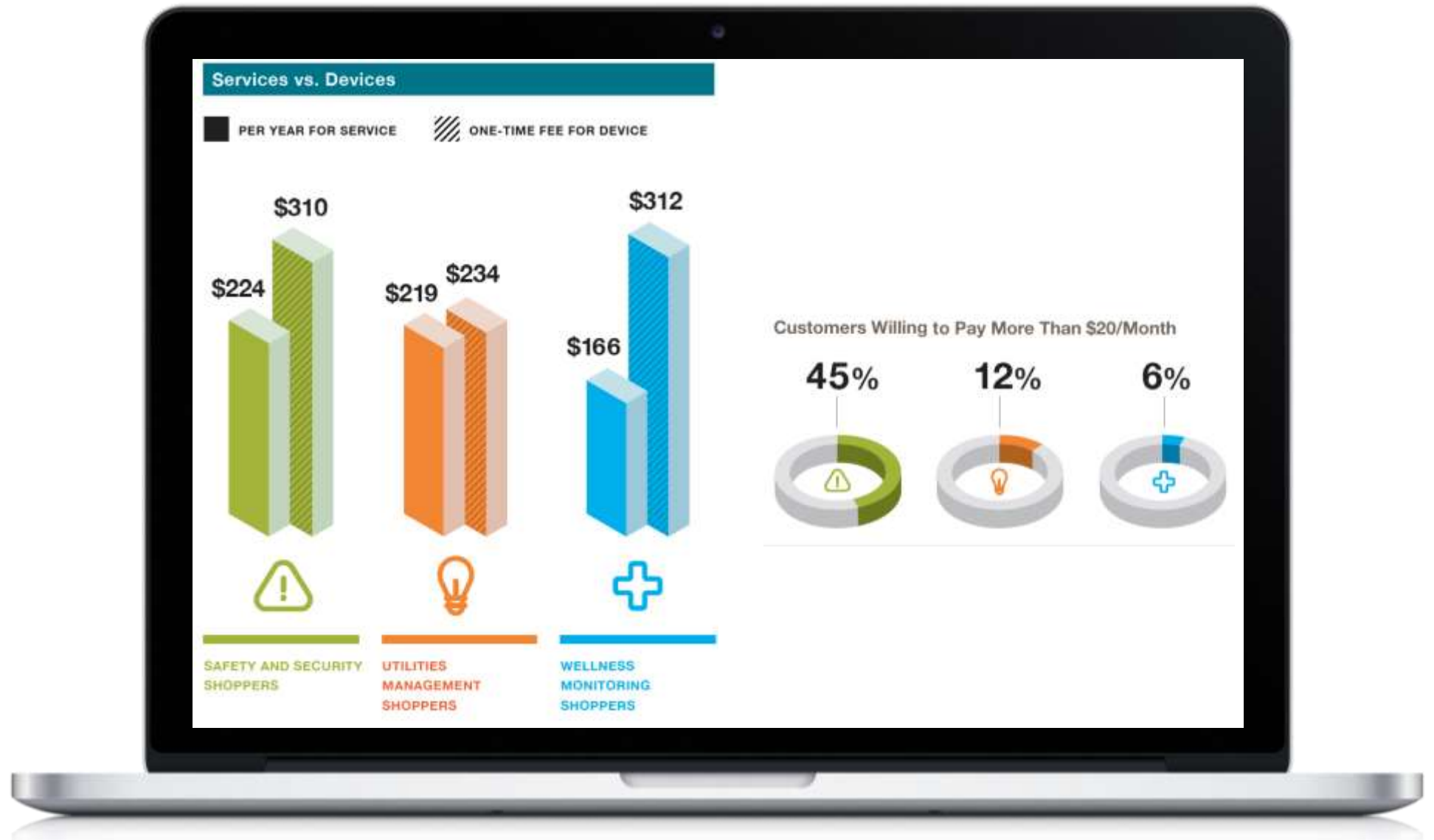18. Connected health monitor

19. Elderly parent/child activity monitor
20. Connected heart rate tracker

Smart Entertainment
21. "Seamless" audio/video
22. Multi-room music
23. Smart music

24. Connected hub

Μελέτη McKinsey

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Από που μπορεί να έρθει έσοδο και υπηρεσία...

Services vs. Devices

PER YEAR FOR SERVICE   ONE-TIME FEE FOR DEVICE

$310
$224
$219 $234
$312
$166

Customers Willing to Pay More Than $20/Month

45%   12%   6%

SAFETY AND SECURITY SHOPPERS

UTILITIES MANAGEMENT SHOPPERS

WELLNESS MONITORING SHOPPERS

Μελέτη McKinsey

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

New Report Released: Global Connected Home Security System Market 2016-2020

According to the report, the growing demand for home security systems and the recent increase in smartphone penetration will aid in the growth of this market during the predicted period.

Further, the report states that with the advent of IoT, the number of connected devices worldwide has increased significantly over the past few years. All Wi-Fi-enabled devices operate on cloud technology where privacy is one of the major concerns when adopting smart home technology.

ADT Case Study

Μπορούμε με ασφάλεια να εξάγουμε το συμπέρασμα ότι το 2013 που άρχισε να συνέρχεται η οικονομία, άρχισε και η ανοδική πορεία των εσόδων της ADT.

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Target Markets for Our Services are Underpenetrated

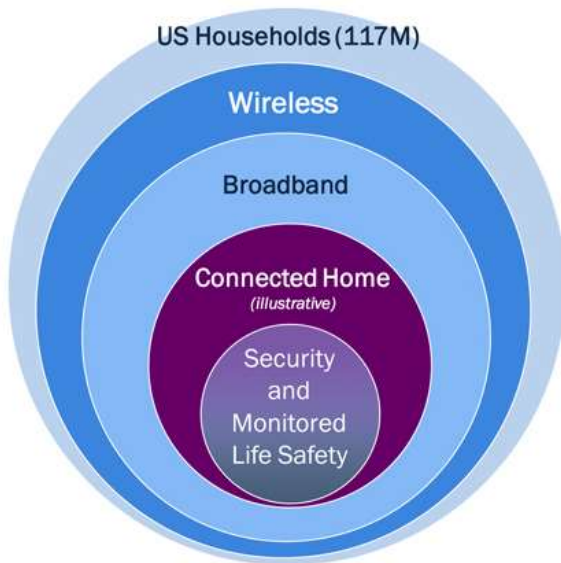Market Penetration of Related Services
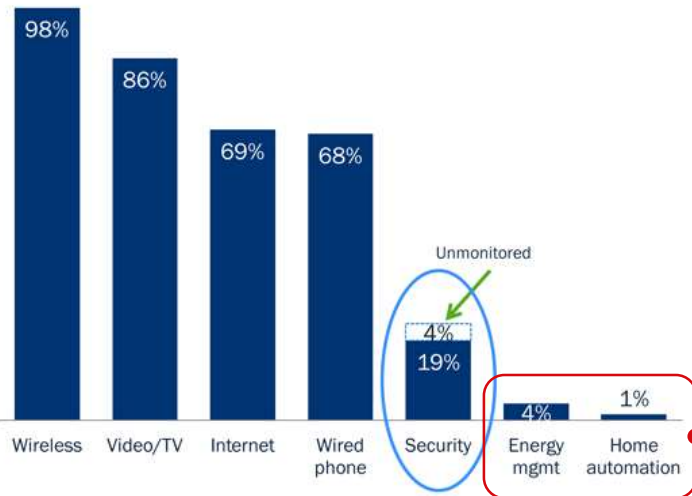
- Security penetration rate much lower than other home services
- New technologies are lowering costs and increasing offerings
- Lower cost and portable hardware options could increase household penetration (low income, renters)

Wireless 98%
Video/TV 86%
Internet 69%
Wired phone 68%
Security 19% (Unmonitored 4%)
Energy mgmt 4%
Home automation 1%

Energy: Parks Associates 2011; Security: Market share for penetration of home security from ADT 2010 Penetration study and 2008 Parks Associates

17

Ενδιαφέρον…

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Ενδιαφέρον...

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Opportunity to Increase Small Business Security Share

Small Business

Estimated Number of Small Businesses

5.5M

No security — 20
Non-monitored security — 30
Monitored security — 50

ADT Share of Monitored Businesses: 14%

U.S. SMB market
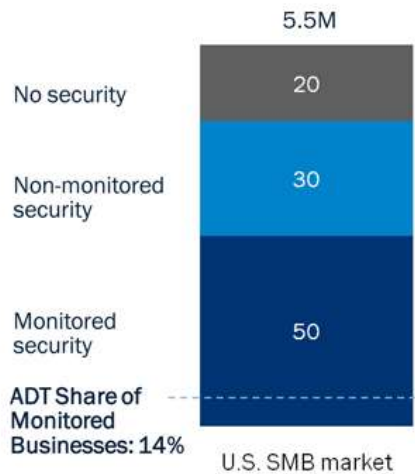
Share Opportunity
- Potential to grow traditional security share from local, national competitors
- Claim leadership position on tech-driven security-and-productivity solutions

Investment Focus
- Expand dedicated marketing support
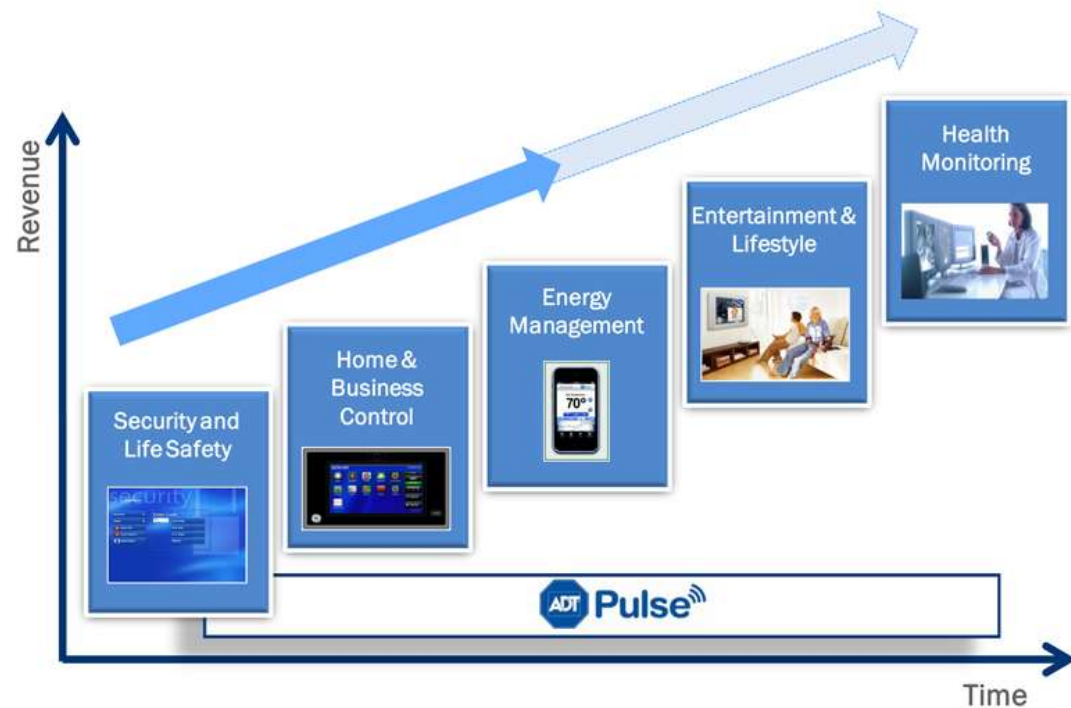- Increase feet on the street

Partners
- Develop specialized small business dealers or leverage residential network
- Retailers

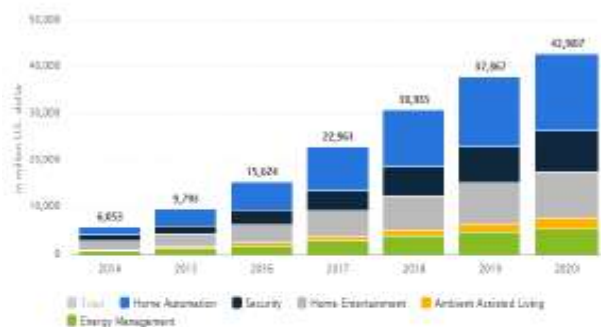Source Studies: SMB Insights 2012, The Business Journals Subscriber Study, 2011

42

Ενδιαφέρον...

Leveraging Pulse as the Platform For Growth

Εισήγαγαν το 2010 την
πλατφόρμα ADT Pulse.
Βλέπουμε εδώ με σαφήνεια
την ιεράρχηση των προϊοντικών
λύσεων και την κατανομή της
προσόδου – αλλά και της
επένδυσης φυσικά – στο χρόνο.

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

2010-2015:
1.500.000 συνδρομητές...

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

1 Μη συγχέουμε τις αγορές

2 Θέλω

3 Προϊόν ή υπηρεσία;

4 Κενά ασφαλείας

5 DIY ή …

6 Design

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

1 Think Greece

2 Μπορώ

3 Και τα δύο

4 Προστασία

5 Και τα δύο

6 Design

Hi end αγορά
Dedicated BMS τμήμα

Medium αγορά
Inim Smart Living

Low end αγορά
AJAX

Η προσέγγιση της Ζαριφόπουλος Α.Ε.

AJAX platform

1. Μια νέα γενιά ασύρματων συστημάτων ασφαλείας με έμφαση σε smart λειτουργίες και design για το σύγχρονο σπίτι ή επιχείρηση

2. Ένα πολύπλοκο σύστημα που ελέγχεται εύκολα. Όλα στην άκρη των δακτύλων σας.

3. Πάντα συνδεδεμένος. Lan, GPRS στη διάθεσή σας.

4. Έως και 7 χρόνια διάρκεια ζωής της μπαταρίας. Σχεδιάστηκε με γνώμονα την ενεργειακή απόδοση.

5. Επαγγελματική εγκατάσταση σε 15 λεπτά

6. Ομάδα συλλογικής ασφάλειας

Ερμής

1. Σύνδεση στον Ερμή με ένα μόνο κλικ. Επωφεληθείτε από την ευκολία σύνδεσης με το αγαπημένο σας Κέντρο Λήψεως Σημάτων.
   Ο Ερμής θα αναλάβει τις δύσκολες καταστάσεις όταν εσείς δεν θα μπορείτε...

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

AJAX platform

1. Ενσωμάτωση καμερών.

2. Integration με τρίτους κατασκευαστές.

3. Z-wave;

PRODUCT LINEUP

Ajax WallSwitch   Ajax DoorProtect   Ajax CombiProtect   Ajax FireProtect   Ajax MotionProtect   Ajax Hub   Ajax StreetSiren   Ajax LeaksProtect   Ajax SpaceControl   Ajax GlassProtect

ΖΑΡΙΦΟΠΟΥΛΟΣ ΑΕ

Ajax RangeExtender

Range extender for the security system signal

Ajax HomeSiren

Wireless indoor siren

Ajax MotionProtect Plus

Motion detector with radio frequency scanning against interference

Ajax FireProtect Plus

Smoke + CO detector

Ajax Keypad

Wireless keypad

To be launched in summer 2017

ΕΡΩΤΗΣΕΙΣ