

# 2018 END OF YEAR Z-WAVE ECOSYSTEM REPORT

PRESENTED BY:





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# A NOTE FROM THE EXECUTIVE DIRECTOR

I knew when I started with the Z-Wave Alliance in 2015 that we were on the brink of something huge. The “smart home,” “home automation,” “connected living” or whatever other terms we see associated with this movement has gone from an early adopter market with a lot of potential to an explosion in consumer and B2B industries. And lucky us — with a full decade of learning, growth and advancements behind us, Z-Wave was perhaps the most prepared of all technologies for the smart home to become a reality. We’ve known for years that low-power mesh networks wouldn’t just be important — they would absolutely necessary for the smart home to succeed. It’s no surprise that with the growth and early success of the smart home, the Z-Wave ecosystem has enjoyed early success and continues to expand with the market.

We decided it was time to put out a formal report of sorts — to benchmark where we’ve been and where we are going. And while the excitement over connected living is real, the details on what the future looks like are still hazy. We know we will face serious threats to privacy and security of these devices and they are threats we cannot afford to ignore. As we build the Internet of Things for our homes, cities, schools, hospitals and office buildings, we must address the fundamental issues that continue to challenge adoption: ease of installation and use, demonstrating the real benefits of this technology for consumers and of course — the big one — the protection of connected devices from cyber intrusion and data leaks. It won’t be one group, company or brand that solves all of these issues. It will require us to work together, to find common ground and understand that a rising tide really does lift all boats. If we want the smart home to become reality, we must work to lift the tide.

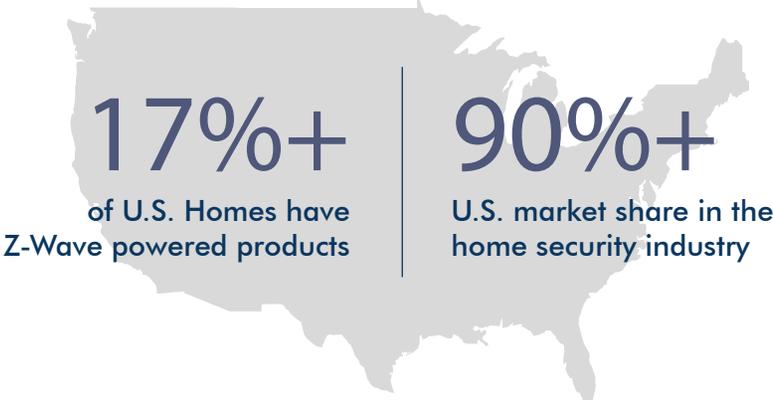
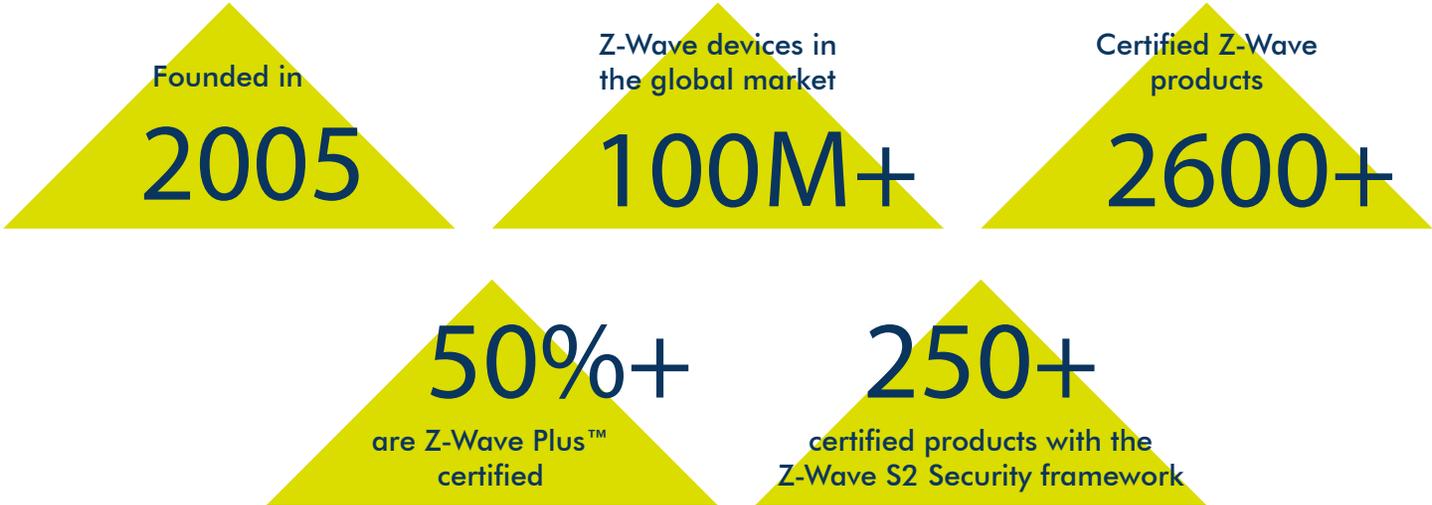
I am honored to be leading that charge here at the Z-Wave Alliance, with our 700+ strong membership base; I know there is much more work to be done.

Join us.

- Mitchell Klein, executive director, Z-Wave Alliance

# Z-WAVE BY THE NUMBERS

AS AN EARLY LEADER, THE Z-WAVE ALLIANCE HAS ACHIEVED SUBSTANTIAL GROWTH AND MOMENTUM AS THE SMART HOME MARKET EXPANDS.



# TOGETHER, WE ARE Z-WAVE

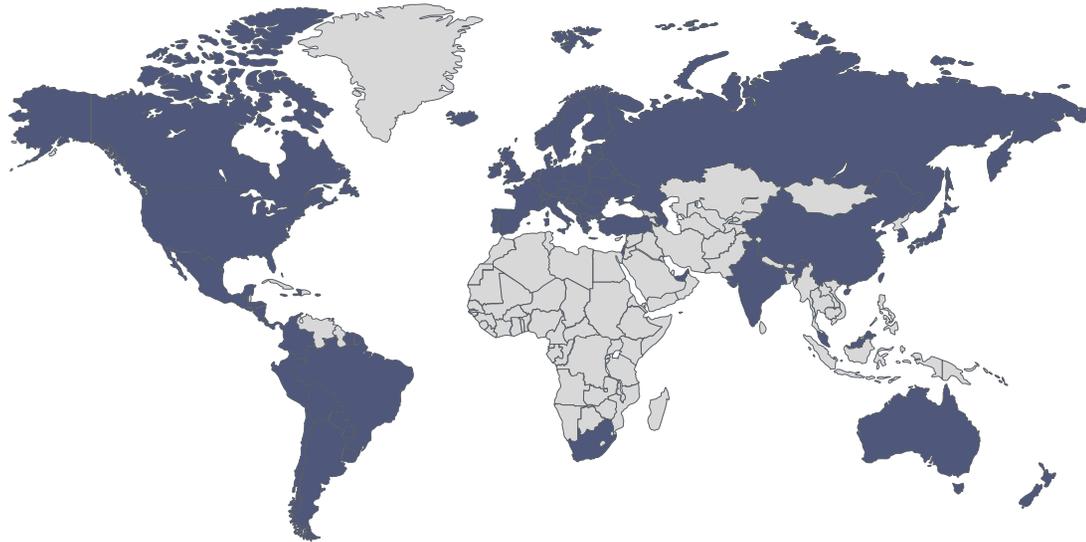
60%  
membership growth  
in the past 5 years

700+  
members

245  
Integrator  
Members

200+  
Z-Wave Certified Installer  
Toolkits distributed

Our members represent dozens of countries worldwide, including:



And across many industry markets and verticals:



Home Security



Smart Buildings/  
Commercial



MDU &  
Hospitality



Telcos & Service  
Providers



Integrators &  
Installers



Energy  
Management



Aging-in-Place  
& Healthcare

## PRINCIPAL MEMBERS:



ALARM.COM

ASSA ABLOY



HUAWEI

JASCO®

LEEDARSON  
*We Build Your Success in IoT*



NEXIA™

NORTEK  
SECURITY & CONTROL



SILICON LABS

SmartThings



Z-WAVE  
ECOSYSTEM  
GROWTH

# LOOKING BACK AND AHEAD

**Z-Wave** was a wireless radio standard designed to support the smart home — well before anyone had used that phrase. Developers and early adopters knew that to succeed, a standard had to not only use low amounts of power and not interfere with other household electronics but also grow stronger (not slower) as devices were added. Z-Wave's legacy as one of the original mesh technologies for smart home control continues today with the 700+ members of the Z-Wave Alliance.

## THE HISTORY OF Z-WAVE



# LOOKING BACK AND AHEAD

2015

Z-Wave Labs, a startup competition designed to foster innovation using Z-Wave technology is launched.

At CEDIA Expo, Z-Wave Alliance announces new membership level for technology integrators along with a training program.

Sigma Designs releases the Z-Wave Public Specification, along with API of Z-Wave over IP and Z-Wave software, providing anyone free and easy access to the Z-Wave interoperability layer for development of smart home IoT applications.

2016

Z-Wave Alliance launches the Z-Wave Certified Installer Toolkit (CIT), a device used to set up, diagnose and repair any Z-Wave network, making smart home installation that much easier. Over the next two years, the CIT wins four industry awards for its innovation and importance to the industry.

Z-Wave Alliance BOD announces that any products receiving Z-Wave certification after April 2, 2017 must include new Z-Wave Security framework, an effort to ensure greater protection from cyber intrusion for both Z-Wave products and global smart home ecosystem.

Z-Wave Alliance hosts Z-Wave Summit Europe, the first worldwide member gathering in Copenhagen, the former home of R&D for Z-Wave.

2017

The Alliance welcomes leading manufacturers ASSA ABLOY, Fibaro, Huawei and LEEDARSON to the Board of Directors as Principal Members

Developed in conjunction with cybersecurity hacking experts, Z-Wave S2 Security mandate goes into effect for all products certified after this date. As of 2018, 250 S2 products deployed to market

Z-Wave Pavilion features the largest multi-brand smart home presence in the Sands at CES 2018, demonstrating over 30 smart home brands. The Pavilion also featured the Z-Wave Experience Home, walk through connected living environment featuring dozens of integrations and voice control with the partner Google Assistant.

2018

Z-Wave Alliance hosts Z-Wave Fall Summit, with the largest attendance of any global member event to date and including speakers from Google, Wirecutter, CTA Parks Associates and more.

Z-Wave 700 Series launches as the next generation of Z-Wave technology, enabling developers to create new classes of smaller, more intelligent smart home products at a lower cost and faster time-to-market.

2019 (Today)

Z-Wave Alliance enters its 14th year with an ecosystem of over 2600 certified devices and 100 million devices in the market worldwide.

# THE FUTURE OF SMART HOME: A LOOK AT Z-WAVE INNOVATION

Mesh wireless networks like those enabled by Z-Wave, allow for greater product interoperability, stronger and more reliable network communications and powerful device security and range. As the market matures, the possibility for truly intelligent homes that go beyond simple connectivity and control becomes reality. Artificial intelligence, voice control, contextual awareness and machine learning will all play a role in future solutions.

We are closer than ever to a context-aware smart home, where applications will respond and adapt automatically to changes in the home and environment through sensing technology that can detect user proximity or environmental factors.

The latest Z-Wave 700 series platform from Silicon Labs, officially available in 2018 to developers, has enhanced technology and performance to enable the artificial intelligence and edge computing trends and is built to power the context-aware smart home. To be useful in the smart home, technologies like AI and machine learning will require a new generation of sensors reporting data about the environment, behaviors, habits and schedules of people in each dwelling to improve the quality of the user's interaction with the devices. The newest Z-Wave technology developments will allow for significantly longer battery life and propel the growth of sensors and battery-powered wireless devices in the future.

“With the worldwide smart home market expected to grow to 1.3 billion devices shipped annually by 2022, much of that adoption and growth will be driven by sensors that enable AI and edge computing applications, which can deliver smart experiences in new verticals such as security, aging-in-place, energy, voice control and insurance,”

said Adam Wright, IDC Senior Analyst, Consumer IoT.

“Advances in wireless technology, such as Z-Wave 700, are driving the battery-powered sensor trend and making these devices easier to install and deploy.”<sup>1</sup>

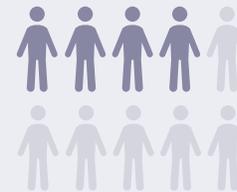
www.z-wavealliance.org

# SMART OPPORTUNITIES FOR THE SMART HOME

## SECURITY - DIY + DIFM

- As products like smart speakers continue to get credit for boosting smart home adoption, the residential security market is still a huge driver for consumers. With the rise of do-it-yourself home security solutions that make connected living and strong smart home functionality the core of their solution, brands like abode systems, Ring and Scout utilize Z-Wave to give their consumers a variety of products to add to their system.
- As DIY grows, legacy powerhouse brands like ADT, Vivint and Alarm.com continue to see demand for professionally installed solutions. Many consumers aren't interested in diving into self-installation and want professional help aka "do it for me."

ADT reported that 40% of their 7.2 million subscriber base were users of ADT Pulse, the company's smart home offering.<sup>2</sup>



40% of  
7.2MLN

Z-Wave has over 90% US market share in traditional security monitoring providers



# SMART OPPORTUNITIES FOR THE SMART HOME

## INSURANCE:

As smart home goes mainstream, home insurance providers are thinking about ways to leverage the innovation and starting slow by offering small discounts for customers who install certain connected safety and security products. The insurance sector has been slow to create large scale change around this technology but it hasn't stopped smart home brands from making their case on why insurers should pay attention.

In the future, insurance providers will more often look for partnerships and opportunities to engage with smart home manufacturers. Liberty Mutual, for instance, has invested in smart home startups like August Smart Lock (also a Z-Wave member) and Nationwide has championed smart home adoption in the past and announced in 2017 a \$100 million investment in insurtech.<sup>3</sup>

Smart locks are great at letting you know who is coming and going and minimizing the risk of giving out your key or leaving it outside, but a smart lock that is synced to a monitored whole-home smart security system with a doorbell camera, so you can see who's trying to get in? The use cases become more powerful when multiple devices work together along with an intelligent back-end and a system collecting data to change how insurance companies can look at mitigation, risk and claims.

### SMART HOMES CAN MAKE A DIFFERENCE:

**50%+** of all homeowner's insurance claims account for weather incidents

#### COMMON HOME INSURANCE CLAIMS:

5

- 25% Exterior wind damage
- 19% Non-weather-related water damage
- 15% Hail
- 11% Weather-related water damage
- 6% Theft

69% of all water heater failures result from a slow leak or a sudden burst.<sup>4</sup>

In 2016, 5.3% of insured homes had a claim, property damage, including theft, accounted for 97.1% of those claims.<sup>5</sup>

One of the strongest benefits of a smart home is its ability to help prevent a home or building from damage — whether that is weather-related, appliance — or home structure failure-related, or human-related (i.e., burglary or theft). A smart home, if set up to do so, can help keep a home safe — but is getting a notification on your smartphone about a sensor detecting water in the basement really a game changer? Maybe not by itself, but give consumers access to a water management device that can actually turn off a water source from the app on their phone? That is a compelling story for an insurer." — IoT Agenda, October 2018

# SMART OPPORTUNITIES FOR THE SMART HOME

## TELCOS / SERVICE PROVIDERS

For telecommunications (telcos) companies, the value of smart home lies in its ability to bring various devices in a home together including TV and internet, into a single, bundled platform. And as more consumers add smart home gear to their existing entertainment and connected setups, telcos are looking at ways that they can be a part of this emerging revenue stream.

The challenge from cord cutters and competition from tech giants are real threats and telcos are looking at new offerings like connected devices along with freemium models to entice younger consumers and keep existing ones.

Telco adoption is playing a large role in Europe: the largest telco in Europe (by revenue), Deutsche Telekom, announced earlier this year their expansion into the smart home via a partnership with Norwegian telco Hich. According to reporting from Energati, "Deutsche Telekom's Smart Home solution has already been rolled out to seven countries in Europe, and with the launch of the joint initiative with Hich, the companies can reach out to up to 150,000 customers in Norway through the 15 power providers."

From a 2018 ABI Research report,

CSPs are being threatened in a market increasingly driven by the likes of Google and Amazon with a range of products and services from AI-powered smart home voice control smart speakers to security solutions," said Pablo Tomasi Senior Analyst at ABI Research.

"But things are changing and CSPs are accelerating their strategies for the smart home. Telefonica with Aura, Orange with Djingo, and SK Telecom with Nugu lead the way of CSPs developing AI assistant to support their smart home play. Now is the time for CSPs to be more aggressive in tying the usage of their AI assistants to their other connected and smart home offerings."<sup>6</sup>

www.z-wavealliance.org

# SMART OPPORTUNITIES FOR THE SMART HOME

## COMMERCIAL

Connected technology is moving beyond the home and into commercial applications: large-scale installations in buildings like offices, MDUs, hospitality, retail and more. Many professionals who install lighting and building automation systems are starting to see smart technology as a great fit for both residential and larger commercial projects that can help save energy costs, reduce operational redundancy, provide for a productive working environment, and streamline lighting, security and more.

For example, Z-Wave Alliance member Parakeet offers a gateway and suite of software products that enable the deployment and management of home automation to large-scale rental properties.

Alliance members like Evolve Controls are also involved in MDU properties (multi-dwelling units) and hospitality, outfitting hotels with the latest connected technology to give travelers a complete experience along with the convenience they expect.

## DIGITAL HEALTH

Digital health and applications to help support the United State's rapidly aging population are also quickly emerging field in connected technology. There are numerous ways that devices like sensors, smart security, and others, can help keep those choosing aging in place, or in hospital or health service fields where patient monitoring is a consideration.

Alliance member Systech and its partners have created SysMED, a healthcare IoT solution the brings several benefits to health organizations, caregivers, and even family members of patients. The use of Z-Wave brings with it the simplicity of wireless installation and the robustness of a mesh networking solution.

Example Z-Wave devices for this application include door contact sensors to monitor restroom usage. Also, a bed sensor, customized with Z-Wave, is used to monitor real-time patient movement as well as unexpected bed moisture. Besides patient monitoring, the SysMED solution monitors the health of the medical equipment used in a patient's room. This includes monitoring the status of specialized medical equipment and generating alerts caused by conditions such as a low battery, or if a device is experiencing behavior outside of normal parameters. Advanced data analytics helps minimize equipment downtime.

# Z-WAVE IN THE NEWS

One of the core jobs of the Z-Wave Alliance is to educate and advocate for Z-Wave wireless technology to consumers, relevant vertical markets, decisionmakers, journalists and analysts. Throughout the years, Alliance leadership and members have insured that Z-Wave has remained at the forefront.



## TOP HEADLINES IN 2018:

- Dealerscope | [Z-Wave Alliance May Have Had Strongest CES Showing Ever](#)
- The Ambient | [Z-Wave explained: What is Z-Wave and why is it important for your smart home?](#)
- GearBrain | [What is Z-Wave and how does it work to automate my smart home?](#)
- Tech Republic | [How the Z-Wave Alliance is building IoT device standards](#)
- IoT Agenda | [Why insurance is the next big opportunity for smart home adoption](#)



# MEMBER SPOTLIGHTS

# MEET OUR BOARD OF DIRECTORS

The Z-Wave Alliance is fortunate to have a cadre of Principals Members who lead our Board of Directors; made up of some of the leading voices and names in smart home and connected technology, their leadership, experience and vision for the future of smart home lend unparalleled value and guidance to the Z-Wave Alliance and Z-Wave technology, and its progress in the market.



YEAR JOINED: 2014

ADT is the leading security system provider in the U.S. and has been a staple in American home and business security for over 140 years. ADT also serves nearly 8 million customers throughout North America and operates more than 200 local branch offices. The award-winning ADT Pulse home security and automation solution is Z-Wave compatible and is an important part of the Z-Wave ecosystem.

[www.adt.com](http://www.adt.com)



ALARM.COM

YEAR JOINED: 2017

Alarm.com is the leading platform for the intelligently connected property. Millions of people depend on Alarm.com's technology to monitor and control their property from anywhere. Centered on security and remote monitoring, the Alarm.com platform addresses a wide range of market needs and enables application-based control for a growing variety of IoT devices with security, video monitoring, intelligent automation and energy management solutions available through a network of thousands of professional service providers in North America and around the globe.

[www.alarm.com](http://www.alarm.com)

## ASSA ABLOY

ASSA ABLOY brings a legacy of success in the global smart home market as a leading global provider of Z-Wave enabled door locks, offering the largest global selection of Z-Wave controller integrations. In addition to its global success in the residential lock market, ASSA ABLOY also manufactures a range of products, solutions and services for commercial markets worldwide.

YEAR JOINED: 2017

[www.assaabloy.com](http://www.assaabloy.com)



YEAR JOINED: 2017

Huawei is a leading global information and communications technology (ICT) solutions provider with innovative solutions, products and services used in more than 170 countries and regions. Many Z-Wave Alliance member companies, including Aeon Labs, LEEDARSON and FIBARO are part of Huawei's OceanConnect pre-integrated IoT ecosystem.

[www.huawei.com](http://www.huawei.com)



YEAR JOINED: 2011

A founding member of the Z-Wave Alliance, Ingersoll Rand created Nexia, a brand of the comfort technology leader. Nexia is a leading smart home system powered primarily by Z-Wave and Wi-Fi technology that allows users to expand their systems with hundreds of devices from some of the nation's top manufacturers to create a truly smart home that adjusts to busy lives.

[www.nexiahome.com](http://www.nexiahome.com)



YEAR JOINED: 2011

Jasco provides one of the most comprehensive product offerings in home automation, lighting, security, home entertainment, power and mobility products, partnering with leading home brands such as GE®, Philips®, Honeywell® to design and develop products to simplify and connect the home.

[www.byjasco.com](http://www.byjasco.com)



*We Build Your Success in IoT*

YEAR JOINED: 2017

Established in 2001, LEEDARSON is a leading provider of lighting solutions, security and intelligent lighting control, sensing and communication systems and specializes in smart, energy-saving technologies. LEEDARSON has become a widely respected organization in the connected home and IoT markets, offering solutions built for residential, commercial and industrial applications and continue to integrate Z-Wave interoperability into its many product lines.

[www.leedarson.com](http://www.leedarson.com)



Nortek Security & Control, LLC (NSC) is a leader in wireless Security, Home Automation and Personal Safety systems and devices. NSC has more than 4 million commercial, residential, and personal systems deployed and more than 20 million connected wireless devices. NSC is transforming the Security, Smart Home, Personal Health and Wellness markets with its trusted brands: 2GIG®, Linear®, Numera® and GoControl®.

YEAR JOINED:  
2011



YEAR JOINED: 2014

LG Uplus, Korea's leading telecommunications operator and an affiliate of LG Group, provides diverse and comprehensive wireline and wireless convergence services for home and personal services. The company was formed through the strategic merging of LG Telecom, LG Dacom, and LG Powercom, which together now operate as LG Uplus.

<http://www.uplus.co.kr/en/>



YEAR JOINED: 2018

Silicon Labs acquired Z-Wave from Sigma Designs in 2018 and is a leading provider of silicon, software and solutions for a smarter, more connected world. Their award-winning technologies are shaping the future of the Internet of Things, Internet infrastructure, industrial automation, consumer and automotive markets. Their world-class engineering team creates products focused on performance, energy savings, connectivity and simplicity.

[www.silabs.com](http://www.silabs.com)



YEAR JOINED: 2015

SmartThings is an open platform that offers users the easiest way to turn their home into a smart home, bringing peace of mind, savings, and convenience. The system consists of a central Hub that can communicate with over 150 devices and is controlled through a single mobile app. The SmartThings home control platform, which works with Z-Wave, is at the forefront of connected home systems that are bringing smart technology to a rapidly growing audience and making homes more intelligent.

[www.smarthings.com](http://www.smarthings.com)



## LEEDARSON

*We Build Your Success in IoT*

### CAN YOU TELL US ABOUT LEEDARSON?

Based in Xiamen, China, LEEDARSON is an ODM/OEM, starting in 2000 with traditional lighting. By 2010, we expanded into IoT with connected lighting and then quickly progressed with a full array of products including sensors, controls and IP products. LEEDARSON not only develops products from a customer's PRD or spec, but we also have our own line of products ready for private labeling. Having this ability drastically cuts our customer's time to market. LEEDARSON is fully invested in IoT and is a board member of many alliances and consortiums, including the Z-Wave Alliance.

### WHAT WOULD YOU SAY IS THE BIGGEST DIFFERENTIATOR FOR Z-WAVE IN THE MARKET?

Simplicity of implementing the profile and the focus on security with initiatives like Z-Wave Security 2 (S2) and SmartStart. A customer's biggest concern is a complex device or ecosystem setup and the lack of security. Z-Wave has conquered these two aspects in the residential market and it plays well in the security channel. The key now is to take that success and push into the commercial space and beyond. With the tremendous support from Silicon Labs, Z-Wave has a bright future and will continue to be a major player in the IoT space.

### WHAT WOULD YOU SAY IS THE NEXT BIGGEST TREND IN THE SMART HOME SPACE?

LEEDARSON has customers in 81 countries throughout the world. This gives us a unique perspective and insight into the IoT market. It's obvious that voice control is the huge trend right now. At LEEDARSON, we're finding new and innovative ways to include voice control like integrating it into smart lighting fixtures. We're also seeing AI starting to take shape in the form of predictive analytics through data mining, predictive modelling and machine learning. We're also seeing more emphasis on edge computing and this is an area that LEEDARSON is pushing into as well.

### WHAT'S NEW FROM LEEDARSON IN 2019?

We are very excited about our "total solution" white label offering called ARNOO. ARNOO is a platform consisting of cloud, app and a full array of IoT devices. LEEDARSON is incredibly flexible with ARNOO allowing our customers to pick what aspects of the solution they need. If they want the complete solution, great! If they just need our IoT products and want to use their own app and cloud, that's great too. We're also offering modules and combo module solutions for those customers that need a product to support a specific protocol or multiple protocols. We know that not every customer's needs are the same. So, providing incredible flexibility to them is very important to us.

### WHAT MAKES LEEDARSON UNIQUE?

Our innovation, quality, scale and speed are what makes us unique. Our customers love our innovation and willingness to push the boundaries and it's certainly one of our stronger suits. We have a tremendous amount of resources dedicated to R&D and engineering who are focused on creating new IoT solutions that both meet current trends and push the boundaries of where smart technology is going. We also have our facility in Taiwan called, XLab. XLab focuses on advanced IoT technologies and that feeds back into our traditional engineering and R&D. When it comes to quality, we meet the highest standards from Six Sigma and CNAS and continually pass very stringent customer audits. Furthermore, when you manufacture and export over 65 million pieces per month and can adjust your manufacturing lines at a moment's notice, that provides huge scale and speed advantages to our customers.



As a professional manufacturer, MCOHome is committed to developing the IoT market, providing new end controlling Z-Wave devices with competitive price for consumers. The product line includes micro modules, power switches, thermostats, air quality monitors and customized hardware. All products are compliant with the CE, ETL, UL, FCC, RoHs or other standards you may need.

MCOHome's new intelligent heat pump thermostat MH-F500 is compatible with most heating, cooling and heat pump systems, is designed with the Z-Wave Plus standard to be compatible with the larger Z-Wave ecosystem to provide effective energy management and climate control for your home. For more product information, please visit our website at [www.mcohome.com](http://www.mcohome.com).

## MH-F500 HEAT PUMP / REGULAR AC THERMOSTAT



### Features & Specification

- Capacitive touch panel with 4.2" LCD display
- Programming options to fit any lifestyle.
- Applied to control heat pump system (up to 3H/2C) and regular AC system
- Power Supply: AC24V, 50/60HZ
- Dimension: 100.5\* 100.5\*21.8mm
- Hole Pitch: 60mm/82mm

**olsys**  
QUALITY OF LIFE

SECURITY  
Z-WAVE PLUS  
STREAM CAMERAS  
BUILT IN 5MP CAMERA  
7" HD TOUCHSCREEN  
LTE & WI-FI DUAL PATH  
ON-SCREEN DIAGNOSTICS

**THE BEST HUB ON THE MARKET**

# FIBARO<sup>®</sup>

## HOME INTELLIGENCE

Upon installation, smart home systems bring new levels of intelligence to their environment, but real benefits begin to accumulate when those systems are capable of continued learning and intelligence. Consumer adoption of smart home products is rapidly growing and manufacturers like FIBARO, now owned by the Nice Group, are capitalizing on the opportunity to deliver advanced, flexible smart home solutions that can be tailored to match any consumer lifestyle.

At CES 2019, FIBARO is launching the all-new Home Center App which serves as the central interface where users can fully manage their FIBARO smart home system. The new app is the first system-based smart home application leveraging machine learning and predictive analysis to intelligently suggest automations and actions directly back to the user.

The Home Center App makes suggestions based off several factors including:

- Past actions taken by the user
- Daily routines such as waking up at certain times, leaving or returning from work
- Switching lights on and off at certain times in specific areas of the home.

The FIBARO smart home system collects this data and is able to make data-driven recommendations about which automations are the most useful and can save the user time and energy usage. The Home Center app gives smart home integrators the opportunity to deliver the most value to their customer. Localized control over the FIBARO system via is an important feature that gives users the peace of mind, knowing that they can still activate their favorite scenes or control their devices even if the internet connection is down.

## FIBARO BROADENS THE SMART HOME WITH FLEXIBLE IOT SOLUTIONS

### MEET SMART IMPLANT

But what if consumers want to integrate the devices they already own into their larger smart home ecosystem? FIBARO's new Z-Wave compatible Smart Implant enables just that. The new Smart Implant by FIBARO can be installed in "dumb" devices to add the intelligence of Z-Wave wireless connectivity so they can be integrated into the larger smart home system.

### HOW DOES IT WORK?

- This bridge-type device leverages the flexibility of the device's inputs combined with the on-board Z-Wave 500 Series chip.
- The FIBARO Smart Implant then receives a transmission signal from the desired device, stores that information, and transmit it via Z-Wave to the certified controller.
- Smart Implant continues to pass the signal on to the rest of the device.
- The Smart Implant can be connected to any device compatible with the device's input and output, including home security systems, gate controllers, shades, thermostats, switches, and many more.

In addition to the 58% of today's consumers with smart home devices, the market is still growing and showing no signs of slowing down. Z-Wave Alliance member companies like FIBARO continue to deliver practical solutions that align with the broader trend of building a context-aware smart home by leveraging AI and machine learning. Factors like adding security and convenience to their home is driving consumers to seek out these efficiencies and Z-Wave will continue to serve as a catalyst for mainstream adoption in the year ahead.



Z-WAVE  
ALLIANCE  
ACTIVITIES  
IN 2018

# #ZWAVE ALLIANCE: GROWTH & INCREASED SHARE-OF- VOICE ACROSS SOCIAL MEDIA

In 2015, Z-Wave Alliance kicked off a social media overhaul to strengthen both the Alliance and Z-Wave technology's presence across key platforms, and to bolster the Alliance's share-of-voice and leadership in the smart home industry. The @ZWave\_Alliance handle was set up across Twitter, Facebook, LinkedIn, and eventually, Instagram to engage members and key industry stakeholders in learning more about Z-Wave, activities and initiatives within the Alliance, and generate industry-wide interest.

A separate B2C focusing @ZWave handle was set up to focus on sharing the benefits of Z-Wave, new products with Z-Wave, and join the consumer conversations across Twitter, Facebook, LinkedIn and Instagram.

Since 2015, both the Alliance and Z-Wave have seen a surge in growth across all social platforms.

## Z-WAVE ALLIANCE – 2015 THROUGH 2018

All Platforms

11.7M

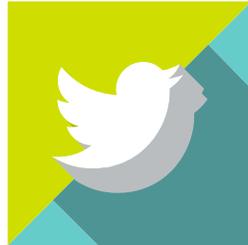
impressions

129K

engagements

61.5K

link clicks



8.6M+  
impressions

10.3K+  
impressions

73M  
potentially  
reached users

TWITTER

- Twitter has been the biggest platform for organic impressions (number of times a post was viewed), with over 8.6M impressions since March 2015.
- The Alliance Twitter account grew from just a few hundred followers in March 2015 to now over 10.3K followers as of November 2018. We attribute this growth to a steady stream of outbound content and news-sharing, as well as commitment to engagement with key industry influencers, manufacturers, integrators, tradeshows and other large audiences in the smart home social media sphere.
- The potential reach for all messages sent between March 2015 and November 2018 is almost 73M users.



1.9M+  
impressions

5K+  
page likes

5.1K+  
followers

FACEBOOK

- Facebook sees most engagement around tradeshows and member events, with engagement and impression numbers spiking most around CES, CEDIA, Z-Wave Summits. The Z-Wave Alliance Facebook page has received over 1.9M impressions since 2015.
- As of November 2018, the Z-Wave Alliance Facebook has received over 5K page likes and has over 5.1k page followers, an increase from less than 100 page likes in 2015.



## LINKEDIN

**3.2K+**  
followers

**850**  
impressions per day

**0.5M+**  
users reached in the  
last 3 years

- LinkedIn continues to be an important platform for Z-Wave and Alliance news-sharing from a B2B perspective and a tool for engaging existing members as well as potential members to learn more about the Alliance and its benefits. The Alliance LinkedIn handle grew from just around 40 followers in March 2015 to over 3.2k as of November 2018.
- The Alliance LinkedIn boasts an average of 850 impressions per day, with over half a million users reached in the last 3 years.
- Top Posts:



## INSTAGRAM

**850+**  
followers

**1.6K+**  
total engagement

#ZWAVE  
#SMARTHOME  
#ZWAVESUMMIT  
#IOT

- Instagram is the most recent profile for the Alliance, starting last year in December 2017, but has grown rapidly. The Alliance Instagram profile currently has over 850 followers, with most growth happening around key tradeshow and events like CES, ISE, CEDIA and Z-Wave Summit.
- Total engagements for the Alliance Instagram since last year are over 1.6k.
- Most engaged hashtags on Z-Wave Alliance posts include: #zwave, #smarthome, #zwavesummit, #iot

# THE Z-WAVE NEWSLETTER: A VOICE FOR THE SMART HOME COMMUNITY

## A QUICK LOOK :

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- Open rates of an earlier version pre-2016 newsletter hovered around 10%. Currently, the open rates average 30-50% to a list of over 8,000 with an unsubscribe rate of between 0.1 and 0.2%.
- The June 2018 newsletter garnered the highest open rate to date – with over 62% opening the issue on mid-year updates and seasonal selling.
- The newsletter has included contributed articles from Alliance members such as: Aeotec, Fibaro, GOAP/Qubino, Systech, Tech Design Associates, Vemarsas, A.I. Home Automation, Wirefree, Luminous Technology, Indome, Conundrum Smart Home Automation Solutions, and many others.
- It has also published contributed pieces from industry thought leaders like: Argus Insights, Z-Wave Zone blog, Parks Associates and PlumChoice.
- In 2017, the Z-Wave Newsletter won the 2017 PR Daily Content Marketing Award in the E-Newsletter category

The Z-Wave Alliance has experienced exponential growth over the last few years, with membership and device certification on the rise. In July 2016, the Alliance relaunched the Z-Wave Newsletter with a mission of demonstrate our growth and representing our collective leadership in the smart home industry with a professional and originally curated newsletter for Z-Wave members, influencers, press and professionals in the smart home space.

With original content from members and industry influencers, monthly editorial themes relevant to the smart home industry, and a look behind the scenes at the work the Alliance and its members are doing in the space, the newsletter serves as a vessel to amplify the message of Z-Wave's importance and growth for the future of IoT.



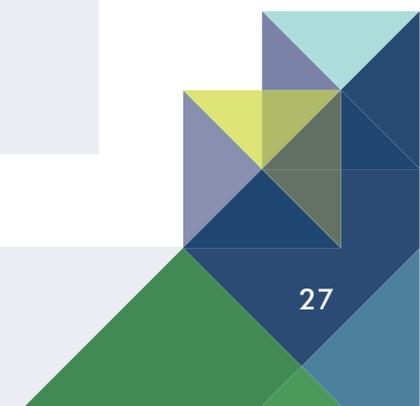
# Z-WAVE SUMMIT: CREATING A GLOBAL VENUE FOR IOT ENGAGEMENT + EDUCATION

Twice a year, the Z-Wave Alliance holds a fall and spring version of the Z-Wave Summit, a global event designed to bring together marketers, product designers and developers, decision-makers and other members along with industry outsiders, media, analysts and influencers to discuss the state of IoT and opportunities for Z-Wave that exist within it. The Z-Wave Summit is an opportunity for those in the Alliance and others who want to learn more about Z-Wave, the Alliance, and all of the benefits of being involved in one of the leading IoT wireless protocols in the industry today.

The event is split into two tracks — business/marketing and technical — each with content directed toward the different audiences. Attendees listen to and participated in a series of engaging panels, fireside chats, and workshops led by industry leaders and peers on smart home and IoT. Throughout the Summit, attendees gain valuable knowledge on market trends from thought leaders and analysts and hear about case studies and implementing Z-Wave in different IoT applications.

The most recent Z-Wave US Fall Summit in September 2018 welcomed over 170 attendees across the Z-Wave ecosystem, the highest yet for the bi-annual event.

Throughout the years, the Summit has transformed from a small gathering of members to the primary venue for Z-Wave education, idea-sharing, and engagement for those involved with Z-Wave in the IoT and smart home. Keynote and main stage speakers have included Google, Strategy Analytics, Parks Associates, BBC and others.



**NEXT UP!**

**Z-WAVE SPRING  
SUMMIT 2019**

AMSTERDAM - MAY 2019

**Z-WAVE FALL  
SUMMIT 2019**

STAY TUNED!

# Z-WAVE ALLIANCE ON THE ROAD

## SPEAKING & EVENTS

Tradeshows are an important aspect Z-Wave education and advocacy in the smart home and other industry vertical markets. The Alliance and its members regularly exhibit at major technology events such as CES, CEDIA, ISE, ISC West, CEATEC, and others. The Z-Wave Pavilion is the core center for exhibition at these events, a larger floor space made up of smaller stands featuring members demonstrating new products and solutions featuring Z-Wave. The interoperability wall shows off a wide range of Z-Wave products across categories like smart locks, lighting, sensors, hubs, accessories and more. The Z-Wave Pavilion is a fixture of the smart home presence at industry trade shows, and represents the growing interest in and support of Z-Wave technology in a range of industry verticals and audiences.

- ▶ The Alliance has hosted the Z-Wave Pavilion at over one hundred events & trade shows around the globe.
- ▶ The 2019 Z-Wave Pavilion at CES is the largest booth in the Sands Smart Home Marketplace at the show and also features the Z-Wave Experience House - a walk-through smart home set up with Z-Wave devices.
- ▶ Trade shows and events are a great opportunity for members to showcase new products, talk to customers, press and stakeholders in person, and accelerate the message of smart home to new audiences and industries.

Another aspect of trade show brand awareness and thought leadership initiatives are speaking opportunities, often presented by the Alliance's executive director, Mitchell Klein or other Z-Wave representatives across both marketing and technical fields.

### THESE INCLUDE:



# LOOKING AHEAD - CONNECT WITH Z-WAVE



Find us at CES 2019 - Sands Booth 41917

[www.z-wavealliance.org](http://www.z-wavealliance.org)

For information on joining the Z-Wave Alliance, contact Membership & Events Director Janet Collins.

To connect with the Z-Wave Alliance Board of Directors or leadership for an interview or quote, reach out to Caster Communications at [zwave@castercomm.com](mailto:zwave@castercomm.com)



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