

SYNOPSIS

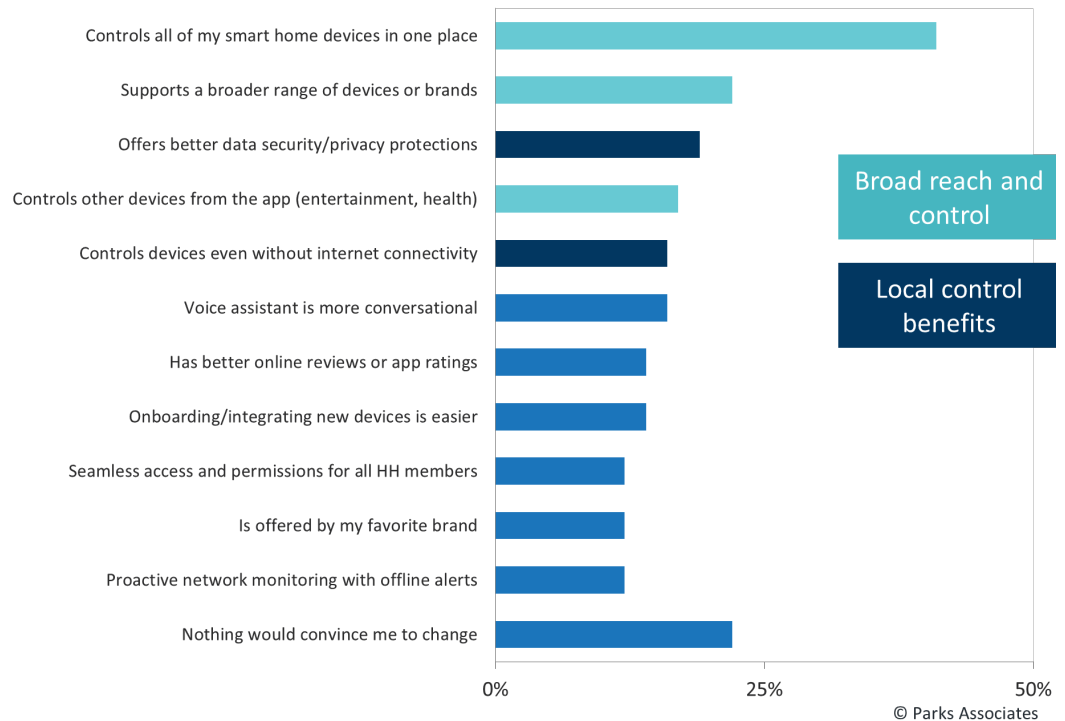
More than a decade into its development, the smart home market is maturing, offering dozens of product types from a growing number of competitors and attracting more mainstream consumers.

This flagship consumer study provides the latest trending data on consumer purchase behavior and preferences that provide critical intelligence for smart home business strategies. The research explores the user experience and pain points that challenge the market. Topics include trending smart product adoption and purchase intention across multiple product categories, purchase channels and installation preferences, leading voice and control platforms, and attitudes about interoperability. This study also probes the ways in which the buyer and user experience can be improved, from the shopping experience through product installation and ongoing support.

Number of Slides: 79

AUTHORS

Key Factors for Switching Smart Home Platforms



Key questions addressed:

1. How is smart home device adoption trending overall and among specified product categories?
2. How were recently purchased devices acquired and installed?
3. How has the makeup of the adopter base changed over time?
4. What are the leading smart home control platforms, and what would convince users to switch platforms?
5. What are the top pain points during device installation and over the lifetime of the product? How are consumers solving their issues?

“Smart home players are challenged to manage rising costs of doing business with the pressures to keep up with competitors in a blistering pace of innovation, particularly in the use of AI.”

—Daniel Holcomb, Senior Analyst, Parks Associates

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Smart Home Market: The Big Picture

- Smart Home Device Ownership
- Average Smart Home Devices Owned
- Number of Smart Home Devices Owned
- Tech Affinity, by Smart Home Device Ownership
- Tech Affinity, Among Smart Home Device Owners
- Smart Home Device Purchases and Intentions to Buy
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- Smart Devices: Affordability
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- Housing Factors Breakdown of Smart Home Device Owners vs Non-Owners

Smart Home Devices: Ownership, Purchases, Intentions

- Smart Safety & Security Device Ownership
- Smart Energy, Lighting, Water Device Ownership
- % Owning Any Smart Appliance
- Smart Appliance Ownership by Type
- Smart Home Control Hub Ownership
- Smart Speaker or Smart Display Ownership
- Smart Security & Safety Device Purchases
- Smart Energy, Lighting, Water Device Purchases
- Purchase Intention: Smart Safety & Security Device

- Purchase Intention: Smart Energy, Lighting, Water Device
- Smart Appliance Purchases
- Purchase Intention: Smart Appliance

Smart Home Buyer Journey

- Awareness of Smart Home Devices
- Information Sources When Shopping
- Smart Home Device Acquisition Method
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- Average Selling Price: Select Smart Home Devices
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- Overall Smart Home Device Installation Methods
- Smart Security & Safety Devices: Professional Installation
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- Difficulty of Initial Set Up by Smart Home Devices
- Experienced Problem with Self Set-up of Smart Home Device
- Problems Experienced When Self Installing Smart Home Devices
- Actions Taken for Smart Home Device Setup
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- % Prefer Self Setup Next Time
- % Experiencing a Problem when Self-Installing Smart Home Device, by Age
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- Net Promoter Score: Smart Home Devices
- NPS ratings in Multiple Categories
- Smart Home Devices: Number of Technical Problems Experienced
- Smart Home Devices: Technical Problems Experienced
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- Smart Home Device: Resolution of Technical Problems by Units

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- Primary Control Method of Smart Home Devices Units

- Primary Control Method of Smart Safety & Security Device
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 - Most Used Platform Used to Control Smart Home Device
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 - Preferred Provider for a Single Unified App: Smartphone/Smart Speaker Provider (Amazon, Google, Apple, Samsung)
 - Preferred Provider for a Single Unified App: Security System Provider
 - Preferred Provider for a Single Unified App: Internet Service Provider

Appendix

ATTRIBUTES

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