

SYNOPSIS

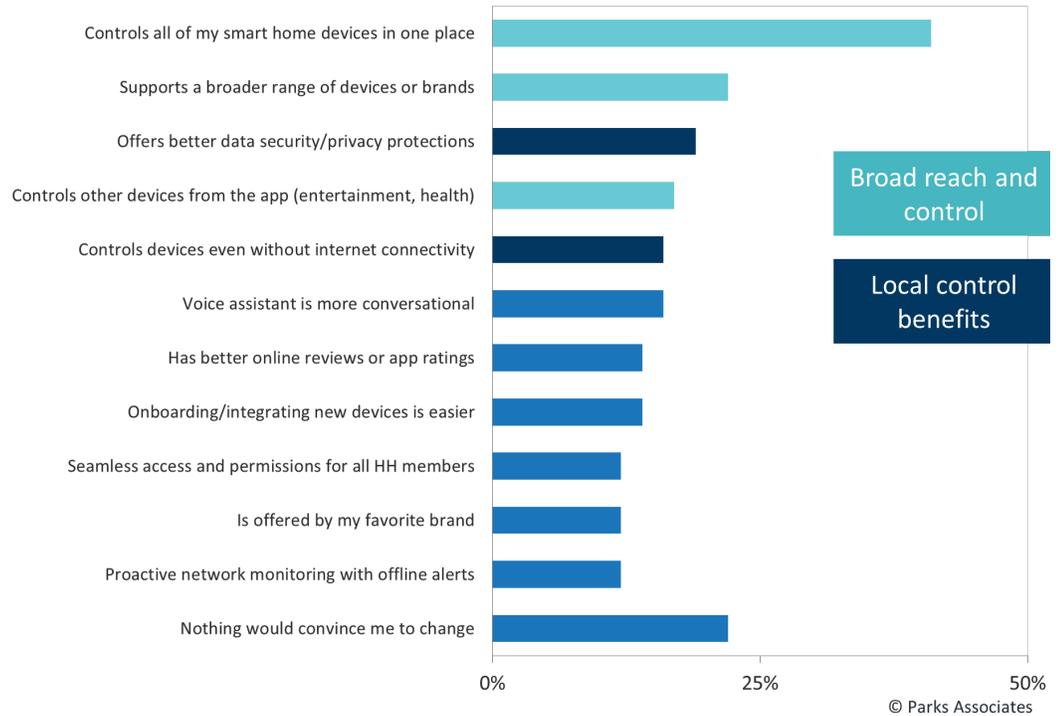
More than a decade into its development, the smart home market is maturing, offering dozens of product types from a growing number of competitors and attracting more mainstream consumers.

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

Industry Analyst

Daniel Holcomb, Senior Analyst, Parks Associates
Jennifer Kent, VP, Research, Parks Associates

Consumer Analytics Team

Yilan Jiang, Senior Director of Consumer Analytics
Sharon Jiang, Consumer Insights Manager
Yuting Mu, Consumer Insights, Analyst I

CONTENTS

Executive Summary

- Smart Home Devices: Adoption, Purchases, Intentions to Buy
- Tech Affinity, Among Smart Home Device Owners
- Smart Devices are “Affordable”
- Top Barriers to Purchase
- Average Selling Price Among Recent Buyers
- Key Factors for Switching Smart Home Platforms
- Leading Smart Home Platforms: Stickiness vs NPS
- Experienced Problem with Self Set-up of Smart Home Device
- Top Problems with Self Set-Up
- Top Technical Issues
- % of Smart Home Device Owners Coordinating Devices
- % of Those with Coordinated Devices Citing Difficulty with Routines/Integrations
- % of Device Owners Coordinating Devices, by Most Often Used Platform

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
- Smart Devices: Familiarity
- Smart Device: Perceived Value of Benefit
- Smart Devices: Affordability
- Demographic Breakdown of Smart Home Device Owners vs Non-Owners
- 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
- Smart Home Product Purchase Channel
- Smart Home Devices Purchase: First Time vs. Repeat Purchase
- Average Selling Price: Select Smart Home Devices
- Smart Home Device Purchase Inhibitors

Installation Experience & Pain Points

- Overall Smart Home Device Installation Methods
- Smart Security & Safety Devices: Professional Installation
- Smart Energy Devices: Professional Installation
- 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
- Device Set Up Preference
- % Prefer Self Setup Next Time
- % Experiencing a Problem when Self-Installing Smart Home Device, by Age
- % Preferring Self Set-up Next Time, by Age

Ongoing User Experience & Support

- 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
- Smart Home Device: Actions Taken After Experiencing Technical Problems
- Smart Home Device: Resolution of Technical Problems by Units

Platform & Controls Experience

- Primary Control Method of Smart Home Devices Units

- Primary Control Method of Smart Safety & Security Device
- Primary Control Method of Energy, Lighting, Water Device
- Platforms Used to Control Smart Home Device
- Number of Platforms Used to Control Smart Home Devices
- Most Used Platform Used to Control Smart Home Device
- Net Promoter Score for Most-Used Smart Home Platform
- Future Purchase and Ecosystem Integration Considerations Among Intenders
- Ecosystem Integration as Critical Consideration to Future Smart Home Device Purchase
- Key Factors for Switching Smart Home Platforms
- Smart Home Platforms Loyalty
- Current Integration of Multiple Smart Home Devices Working Together by Most Often Used Platform
- Purpose of Smart Home Device Integration by Most Often Used Platform
- Ease of Creating Smart Home Routines and Integrations
- Ease of Routines and Integrations Creation by Most Used Platform
- Preferred Methods of Initiating a Routine
- Preferred Smart Home Device for Acting as a Smart Home Hub
- Preferred Provider for a Single Unified App
- 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

Interoperability & Integration

- Current Integration of Multiple Smart Home Devices Working Together
- Purpose of Smart Home Device Integration

Appendix

ATTRIBUTES

Parks Associates
2301 West Plano Parkway
Suite 210
Plano, TX 75075

972.490.1113 phone
parksassociates.com
sales@parksassociates.com

Published by Parks Associates
© 2025 Parks Associates
Plano, Texas 75075

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.