

SYNOPSIS

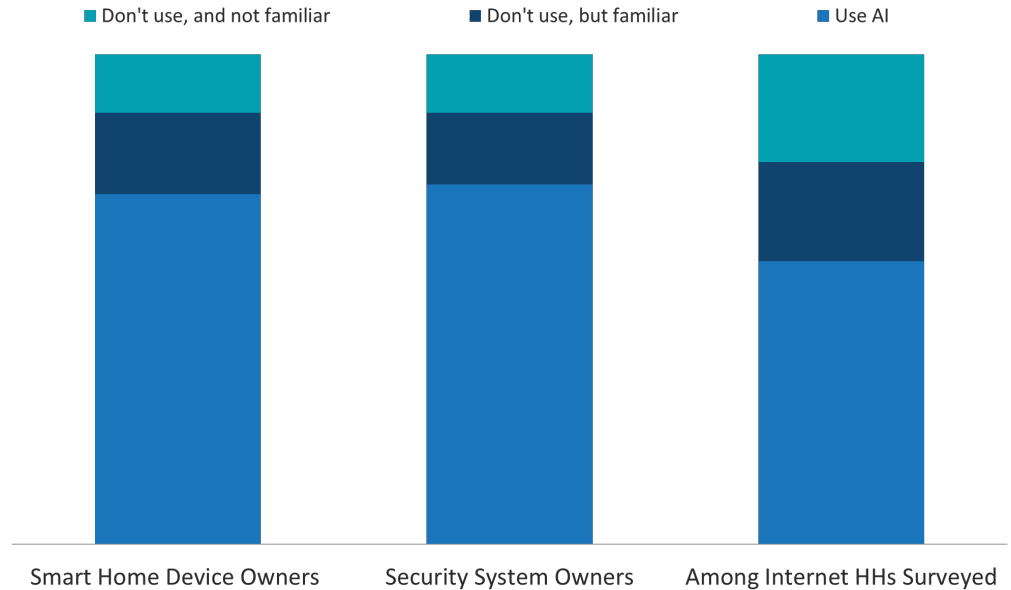
As the smart home market hits the mainstream, control platforms have become the central battleground for ecosystem dominance. Tech giants, device makers, and service providers are competing on functionality, UX, interoperability, and perceived value. Consumers now expect seamless control, broad compatibility, and personalized automation—and their loyalty is up for grabs.

This flagship study evaluates consumer engagement with smart home control platforms, including preferences, satisfaction, and loyalty across major ecosystems. It measures adoption, usage, and switching behavior, and assesses the role of platforms in overall smart home satisfaction. The research explores monetization strategies—including subscriptions, bundled services, and AI-enabled features—while tracking interoperability expectations, pain points, and the evolving influence of Matter and open standards.

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AUTHORS

Generative AI Familiarity and Use among Smart Home & Security Device Owners and US Internet Households



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Key questions addressed:

1. How is smart home device adoption trending overall and among specified product categories?
2. How has the makeup of the adopter base changed since last year?
3. What are the leading smart home control platforms?
4. What defines the user experience with leading smart home platforms?
5. How loyal are smart home users to their control platforms and what would encourage consumers to switch?
6. For what AI-enabled services are consumers willing to pay?

“The next phase of smart home growth will be driven less by device ownership and more by which platforms can deliver trusted, intelligent, and interoperable experiences that simplify increasingly complex connected homes while creating long-term consumer engagement and recurring revenue.”

— Jennifer Kent, SVP and Principal Analyst, Parks Associates

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Appendix

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