



Smart Homes and Digital Assistants: A Survey Report

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Smart Home Facts



1/4

US Households
Have Smart Home
Devices

Top 5 Smart Home Devices
Smart Speakers (e.g., Echo)
Smart Thermostats
Smart Lightbulbs
Outdoor Video Cameras
Indoor Video Cameras

7

Smart Home Devices
Per Household

69%

Purchased All
Smart Home
Devices

% of Households with Each of Top 5
59%
44%
30%
28%
26%

1/3

US Households
Have Smart Home
Services



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RESEARCH

SMART HOME SERVICE PRICES

\$68

Average Monthly Bill
For Smart Home Service

Top 5 Favorite Smart Home Devices

Smart Speakers

Smart Thermostats

Outdoor Video Cameras

Light Bulbs

Distributed Audio Systems

Top 5 Locations for Purchase of Smart Home Devices

Online Only Sites (e.g., Amazon)

Electronics Retail Stores (e.g., Best Buy)

Home Goods Retail Stores (e.g., Home Depot)

Electronics Store Web Sites (e.g., Bestbuy.com)

Home Goods Web Sites (e.g., Homedepot.com)

SMART HOME PRODUCT RESEARCH

59%

Researched Smart Home Products At
Online Only Sites

Demographic Highlights

AVERAGE SMART HOME HOUSEHOLD INCOME

\$78K

Household Incomes
Over \$23K Higher
than US Average

EDUCATION LEVELS

85% Had at Least Some
College Experience

EMPLOYMENT LEVELS

73%

At Least Partially Employed
With 62% Fully
Employed

LEAST FAVORITE SMART HOME DEVICES

24%

Percentage Who's Least Favorite Device Had
Least Practical Benefit

Top 5 Least Favorite Smart Home Devices
Smart Speaker
Smart Thermostat
Light Bulbs
Indoor Security Cameras
Garage Door Openers

Top 5 Reasons for Purchase of Smart Home Devices
Cool Technology
Home Control
Safety and Security
Save Money on Utilities
Home Automation

REASONS FOR PURCHASE

49%

Purchased Smart Home Devices Because
Cool Technology

HOME GATEWAYS

18% Use a Dedicated Home Gateway

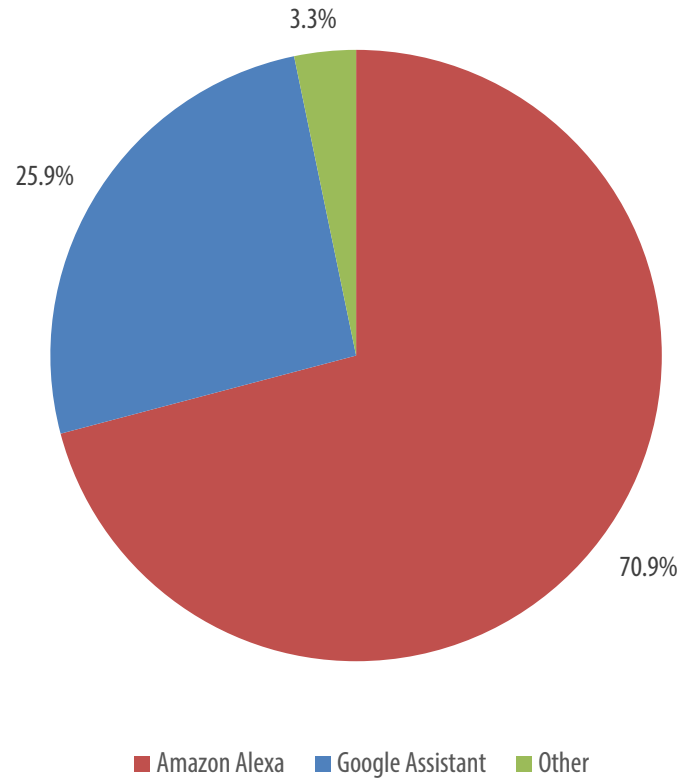
Top 5 Ways to Control Smart Home Devices
Smartphone Apps
Directly on Device
Voice Control
Tablet Apps
PC Apps

Top 4 Reasons for Using Centralized Smart Home App
Easier to Use
Makes Devices Work as System
Control More Devices Simultaneously
Too Many Individual Apps

SMART HOME APPS

44% ^{Primarily Use} Centralized Apps vs. Individual Apps

Smart Speaker Brands



Digital Assistant Facts

1/2

Smart Speaker Owners
Use It At Least Daily

Top 5 Smart Speaker Requests
Play Music
Weather
News
Trivia, Basic Facts
Calendar

30%

Use Smartphone Assistants
At Least Daily

55%

Use Multiple Assistants
At Least Part of the
Time

Top 5 Smartphone Assistant Requests
Weather
Play Music
Contact Information
Traffic
Calendar

15%

US PC Assistants
At Least Daily

SMART SPEAKER PURCHASES

60% Purchased in Last 6 Months

Top 5 Smart Speaker Locations in Home
Living Room
Bedroom
Family Room
Kitchen
Dining Room

Top 5 Applications for Smart Speaker Display
Clocks and Timers
Calendar
News, Sports, Weather
Media Info (Album Art, etc.)
Full Web Browser

SMART SPEAKER DISPLAYS

35% Interested in Smart Speaker With 7" or Larger Display

69% Believe Little to No Accuracy Differences Between Assistant

Top Verbatim Comment Themes
New Technology Excitement
Ease of Use
Security/Privacy
Frustration With Use
Multiple Favorite Brands

Top 5 Reasons for Choosing One Assistant Over Another
Whatever Device is Closest
Most Comfortable With
Most Useful
Only Use One Assistant
Most Accurate

"The whole smart assistant thing is very helpful but a little scary."

"I enjoy using it. It's not perfect yet as sometimes the info I give isn't understood but overall very useful."

"I haven't really found them to be as handy as they were hyped to be."

"Love having the ability to use voice commands, so much easier."

"Some things are convenient, some are not worth the work, and it can cause a little paranoia that you can be monitored."

Key Findings

- Smart speakers like Amazon Echo are creating a major spike in adoption and interest in smart homes
 - People generally like the products and technology, but are also frustrated by their limitations
- Lingering confusion on setting up smart homes on a DIY basis is driving adoption of smart home services
- Digital assistants on smart speakers are used significantly more than the ones on smartphones or PCs
- Top requests made to assistants vary by device but top ones are playing music and getting the weather
- There's no clear favorite or leader yet among digital assistants with regard to usefulness or accuracy
 - Most consumers don't see a major difference
- Opportunities exist to bring assistants across multiple devices



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For additional information and complete survey results, a 107-slide version of this report is available.



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