



Smart Home

Making the smart home a reality



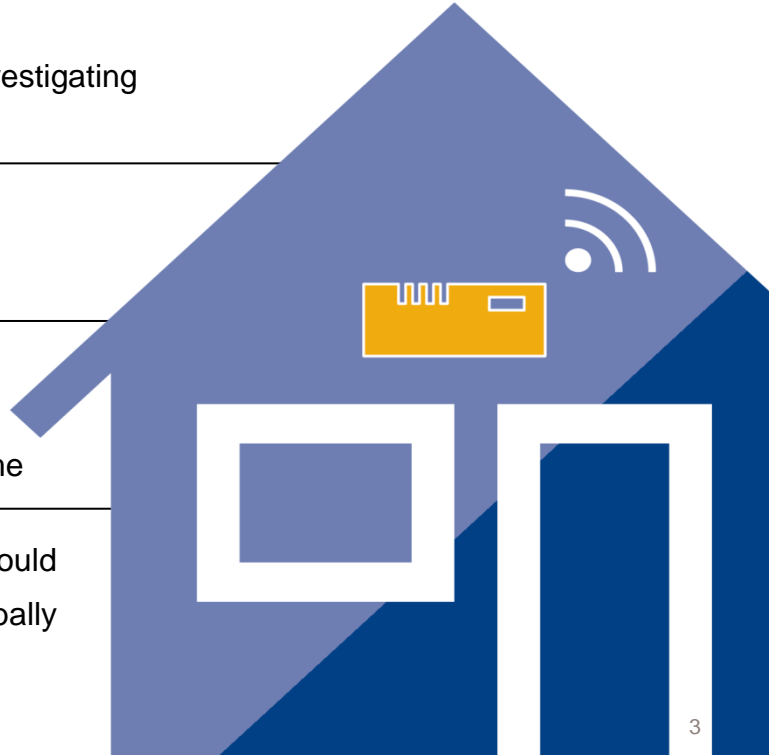
Market potential

Why focus on the smart home?

The smart home category has huge potential and has led to a number of organizations planning to address this market in 2015 and beyond



- Businesses from **diverse** industries are investigating the opportunities
- The market is expected to **expand rapidly** as more brands see the potential
- Companies as diverse as home retailers, insurance providers, utilities and tech companies **all interested** in Smart Home
- Market forecasts globally suggest the market could range from \$40bn* to **over \$58bn**** globally by 2020



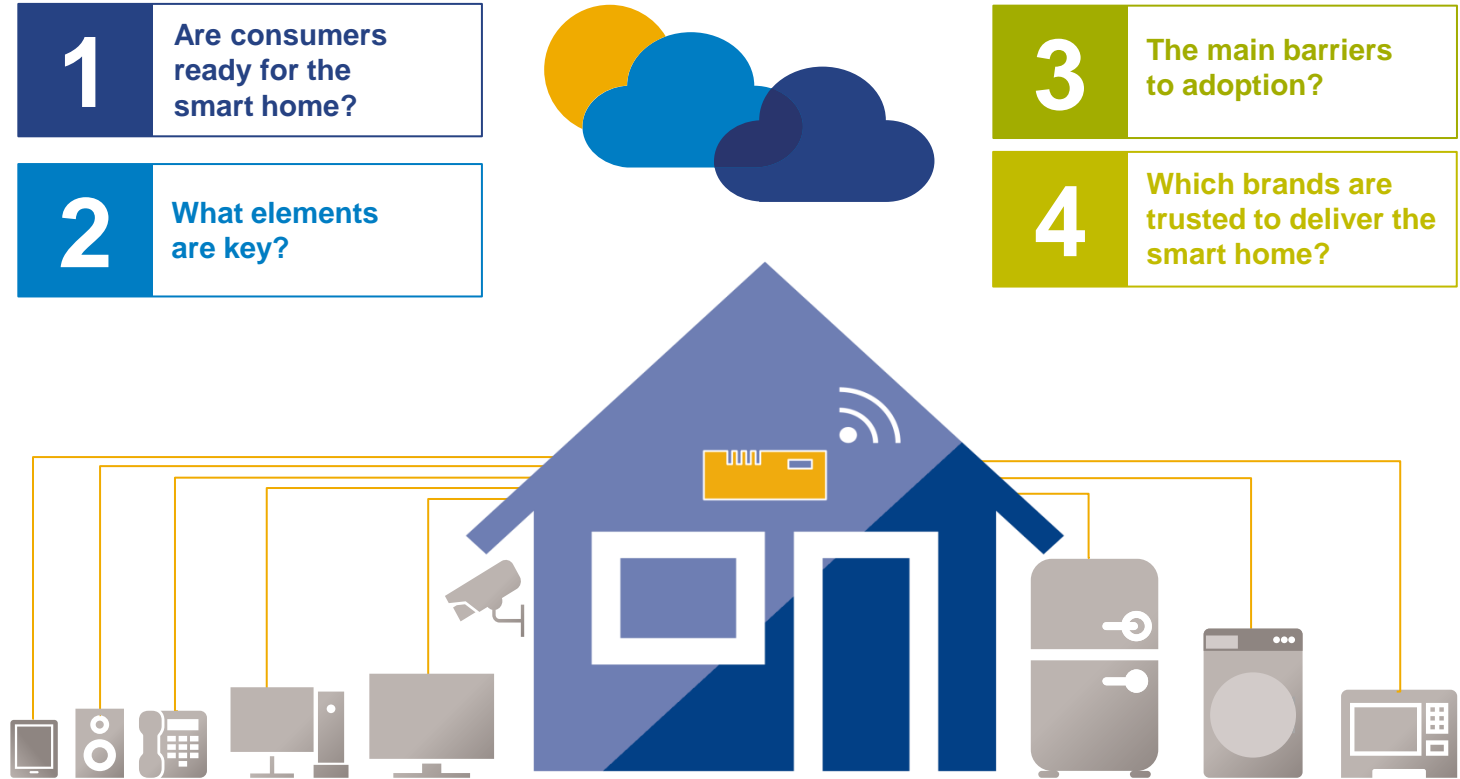
But a number of questions remain

1 Are consumers ready for the smart home?

2 What elements are key?

3 The main barriers to adoption?

4 Which brands are trusted to deliver the smart home?



Answering your key questions



Businesses require consumer insights to guide the development of their strategy in this increasingly competitive market place



Our insights

GfK's smart home study

We surveyed +7,000 consumers across 7 markets to support you in making sense of the market potential

7 Markets

Brazil, China, Germany, Japan, South Korea, UK, USA

+7,000
Interviews

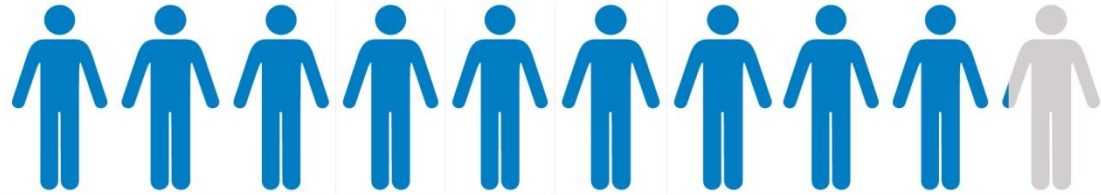
Online
Methodology



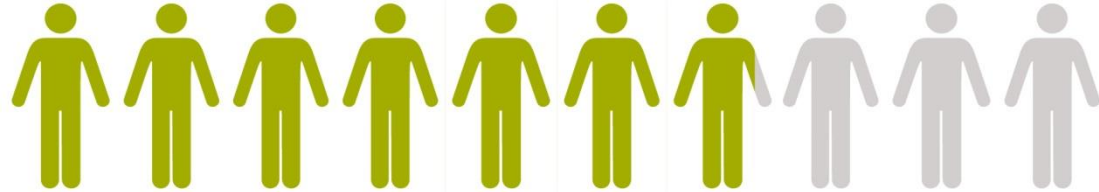
On the following slides, we give you a preview of our detailed market data

'Smart home' as a term resonates with consumers.....

Aware
91%



Some
knowledge
68%



Key technologies that are expected to have the greatest impact on consumers lives are....



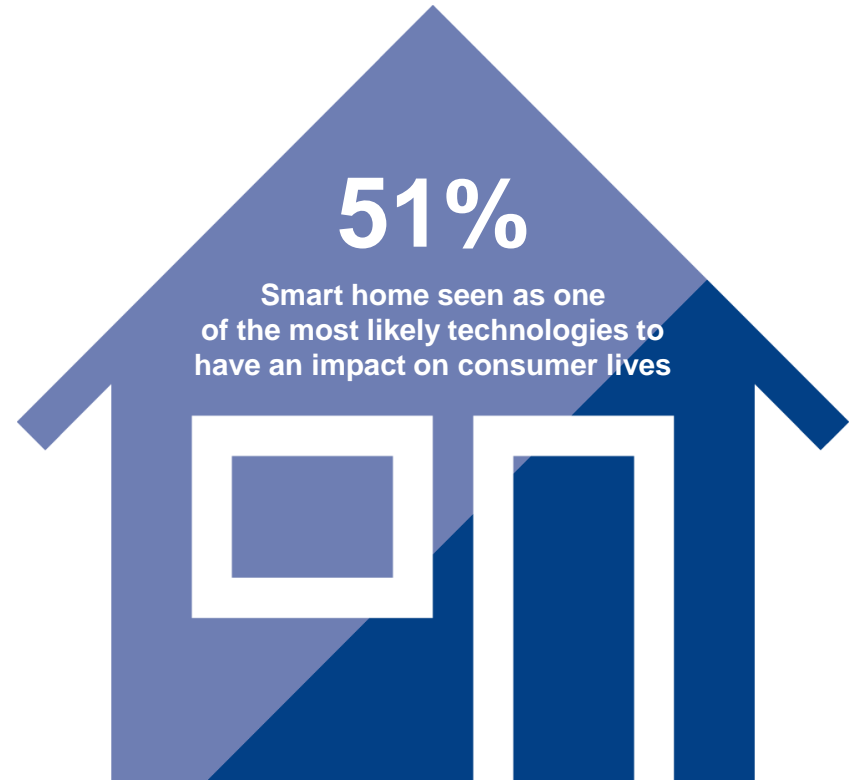
54% Mobile payments



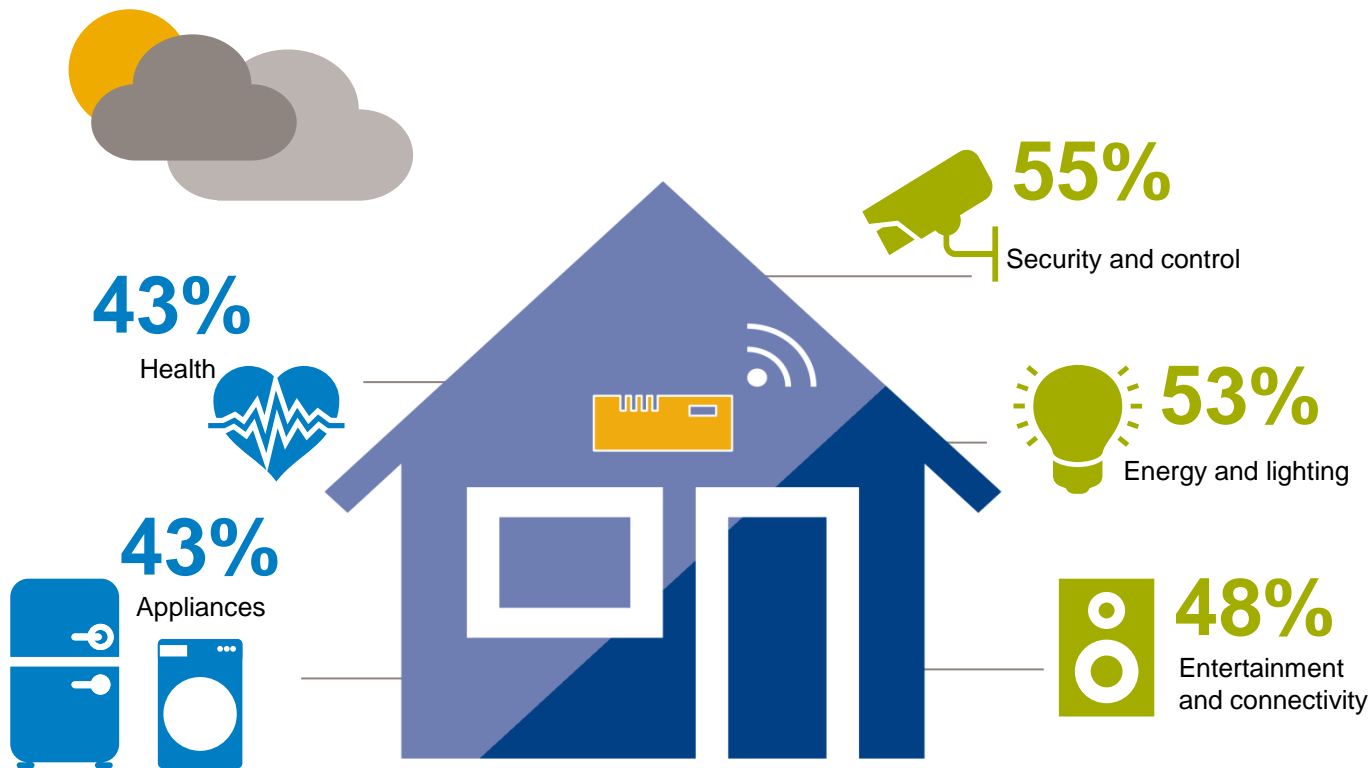
41% 3d Printing



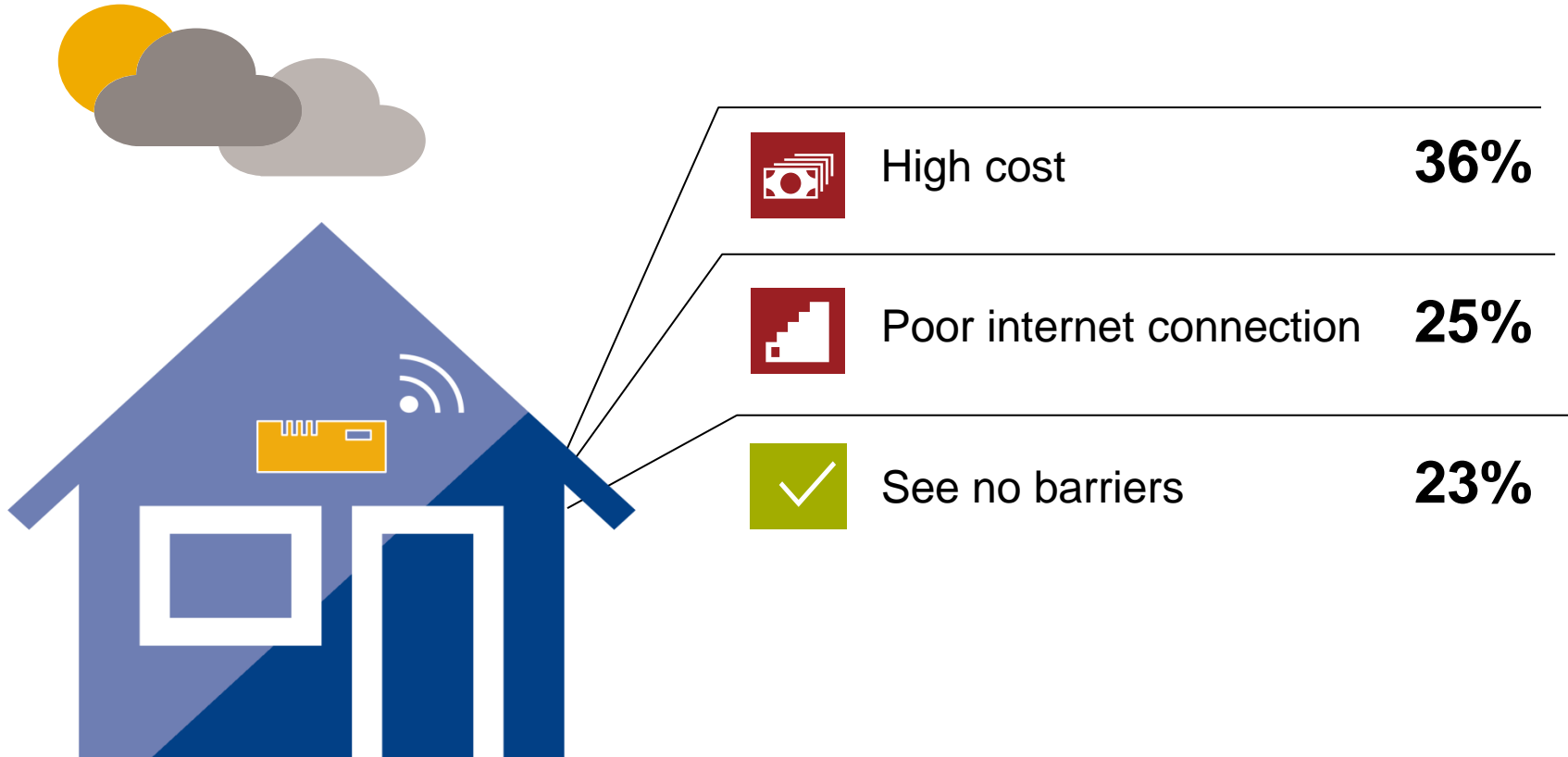
33% Wearables



The areas that are most appealing around the smart home centre on.....



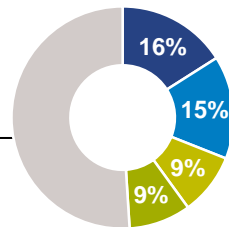
Main barriers to adopting smart home technology are....



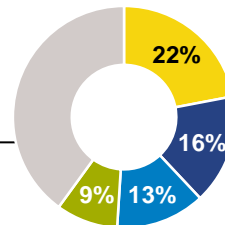
A mix of organisations are trusted to deliver smart home across the key aspects



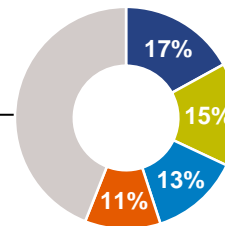
Security & Control



Energy/Lighting

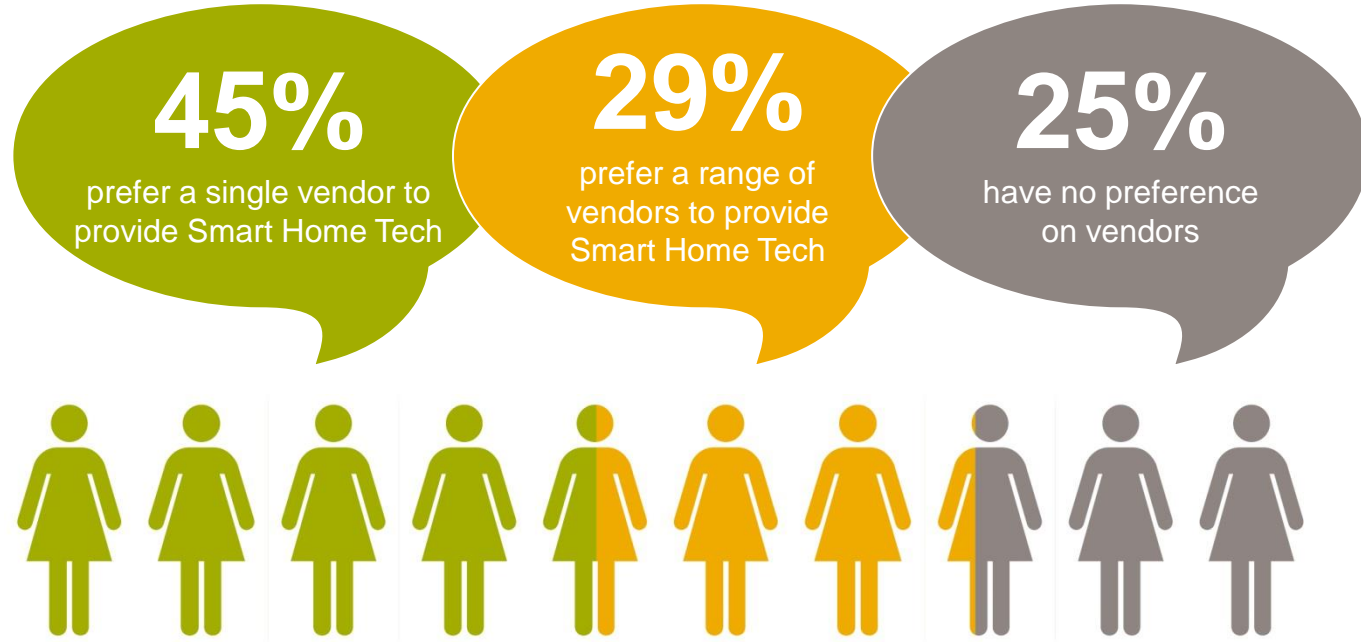


Entertainment & Connectivity



- Electronics mfr
- Global tech
- High st retailer
- Mobile operator
- Online retailer
- Telecoms
- Utility

Consumers tend to prefer sourcing their smart home technology from a single provider



Your Growth from Knowledge

Our detailed reports give you unique insights to drive your success in the smart home market



We explore the following areas:

Importance/awareness of smart home relative to other trends (e.g. mobile payments etc.)

Which smart home products or solutions are of most interest

Understanding of the smart home

Satisfaction with any smart products or solutions currently owned

Current/potential adoption levels of smart home solutions

Barriers to adoption

Key drivers/perceived benefits for smart home solutions

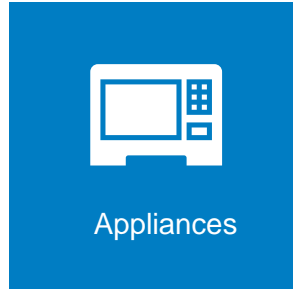
Sectors and brands trusted to deliver smart home solutions

The study covers five main categories within the smart home

As well as evaluating consumer response to the smart home at a holistic level, we also explore specific use cases within each category



- Smart blinds or shutters
- Alarm system
- Motion sensors for doors & windows
- Smart detectors
- IP camera
- Access control (digital keys)
- Smart Doorbell
- Smoke alarm & air quality sensor



- Smart toothbrush
- Smart kettle
- Smart coffee maker
- Smart air conditioner
- Smart refrigerator
- Smart washing machine
- Robot vacuum cleaner



- Streaming multi room audio
- Smart TV
- Smart set top box
- Smart Tuner/Amplifier/Receivers
- Home Plugs
- Routers
- Repeaters
- W-LAN sticks



- Smart thermostat
- Energy manager
- Smart control radiator
- Smart meter (energy meter)
- Monitoring of boiler at a distance
- Smart lighting (smart lamps)
- Smart light control



- Personal scale
- Blood pressure monitor
- Fitness and activity tracker
- Smart Baby monitors
- Medication monitor/reminder
- Disease activity monitor

Scope of the study

Exploring the awareness, understanding and potential of smart home solutions...

1. Purchase history and introduction to smart home

- Current household/personal device ownership
- Access to subscription-based online content
- Familiarity with current technologies and tech trends
- Understanding the smart home concept – including knowledge of products, devices and services

2. Technology within the home

- Attitudes to purchasing technology within the home

3. Assessing the smart home

- Appeal and usefulness of smart home technology in fulfilling current needs
- Believability and understanding of smart home technology

4. Smart home: appeal, ownership, purchase intent and barriers

- Appeal of smart home product and solution categories
- General attitudes to purchasing products and solutions
- Current use/future interest in specific smart home products and services
- Satisfaction with products and services currently owned
- Interest in purchasing smart home products / solutions in the near future
- Subscription type, installation and maintenance preference
- Barriers to purchasing smart home technology
- Sources consulted prior to purchasing smart home technology

Scope of the study (continued)

...both now and in the future

5. Smart technology within the home

General attitudes to smart home technology

6. Suppliers, services and communication within the smart home

- Expected channels / providers of smart home services
- Type of suppliers trusted to provide smart home services
- Attitudes to a single vendor providing smart home technology
- Devices / technologies used to control smart home technologies
- Expectations of communication between smart home devices

7. Early adopters

- GfK proprietary questions to identify Leading Edge Consumers

8. Consumer demographics

- Respondent demographics – including household conditions, employment status and income bands

About the reports

We have 7 market reports and a global market report available for purchase:

- Cost per report: \$5k - £3.5k - €5k
- What is included:
- PowerPoint report
 - Data tabulations

OFFER

- Volume discount available for confirmed sales until end of 2015
- Purchase all 8 reports together for \$25k - £16k - €25k

Report availability



Week commencing 23rd November



Week commencing 7th December



Week commencing 14th December



January 2015

Get in touch

For more information about the study or to purchase our reports, please contact:



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Thank you

GfK is the trusted source of relevant market and consumer information that enables its clients to make smarter decisions. More than 13,000 market research experts combine their passion with GfK's long-standing data science experience. This allows GfK to deliver vital global insights matched with local market intelligence from more than 100 countries. By using innovative technologies and data sciences, GfK turns big data into smart data, enabling its clients to improve their competitive edge and enrich consumers' experiences and choices.