



21/02/2024

REPORT

Smart Home Technologies



AUDIENCE

Demographics

United States

Category

Major Household Appliances

Custom Screening

Answered "Smart Speakers and Assistants (e.g., Amazon Echo/Alexa, Google Home/Assistant)" or "Home Security and Safety Devices (e.g., Smart Locks, Security Cameras, Smoke Detectors)" or "Cleaning and Maintenance Robots (e.g., Robotic Vacuum Cleaners, Robotic Lawn Mowers)" or "Other Smart Appliances (e.g. Smart Refrigerators, Smart TVs, Smart Ovens)" to "Which of the following Smart Home Devices do you own?"

OBJECTIVE

To explore the current state of smart home device adoption among consumers, identifying key trends, drivers, and barriers within the smart home industry. To explore consumer awareness, attitudes, thoughts and behaviours towards smart home technologies. Do they have any concerns about data and security if so what are they? How do these devices integrate into daily living, enhance home security or comfort, and impact the overall quality of life? Are there any perception changes in their perspectives about these technologies over time ?

BURNING QUESTION

What qualities do you value most in your smart home devices and what are your concerns about them?



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CHAT GUIDE

1. Can you describe your daily routine and how it involves the use of smart home devices?
2. What was your first smart home device and what motivated you to purchase it?
3. What are the key features you look for when purchasing a smart home device?
4. Have you ever experienced any difficulties while operating your smart home devices?
5. Would you prioritize using smart home devices for enhancing your comfort or for improving your security? Please explain your choice.
6. In what ways have smart home devices impacted your quality of life? Can you share some specific examples?
7. Which smart home device do you value the most and why?
8. How would you feel if you were unable to use your smart home devices for a day?
9. What are your main concerns when it comes to using smart home devices?
10. Do you have security concerns related to your smart home devices? If so how do you address them? Have you taken any specific measures to protect your devices from hacking or unauthorized access?
11. How comfortable are you with the data collected by your smart home devices?
12. Do you believe that your smart home devices actively listen to your conversations? Can you explain your reasoning?
13. How much do you trust in brands' statements about the protection and privacy of your data?
14. What would make you feel more comfortable using smart home devices?
15. Imagine you are a smart home device, how would you make the life of your owner easier?
16. Before purchasing, what benefits did you expect to gain from your smart home devices? How do these expectations compare to your actual experience?
17. Looking back, how has your perspective and trust in these devices changed over the years, if at all? Are you more trusting or more skeptical?
18. What changes, if any, would you like to see in the future of smart home devices?
19. What advice would you give to someone who is considering purchasing their first smart home device?



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AI SUMMARY

Consumers value reliability, ease of use, and integration with other devices as the most important qualities in their smart home devices. They appreciate the convenience and enhanced security these devices provide, allowing them to monitor their homes remotely, streamline daily tasks, and receive alerts for various activities. Smart home devices such as Amazon Alexa, Ring doorbells, smart vacuums, and smart ovens are integrated into daily routines, offering functionalities like voice control, remote access, and hands-free assistance, which are particularly beneficial for individuals with mobility issues or busy lifestyles.

However, concerns about privacy and data security are prevalent among users. While some consumers express a high level of trust in the brands and take comfort in the belief that government regulations protect their data privacy, others are more skeptical. They worry about the potential for unauthorized access to their devices, data breaches, and the possibility of being actively listened to by their devices. To address these concerns, consumers suggest improvements such as better data privacy controls, clearer user agreements, and the ability to opt out of data collection.

Overall, while consumers enjoy the benefits of smart home devices and have integrated them deeply into their lives, they also desire advancements in privacy, security, and data protection to feel more comfortable with the technology. They advise new users to conduct thorough research, understand privacy terms, and consider professional installation to ensure optimal functionality and security.





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KEY INSIGHTS

Security and Comfort Enhancement

- **Peace of Mind:** Security features, such as cameras and alerts, are crucial as they provide respondents with a sense of safety and reassurance, whether they are at home or away.
- **Balance of Comfort and Security:** While some respondents prioritize comfort-enhancing features, there is a strong preference for security related functionalities, indicating that the protection of their home and family is a top concern.

Privacy and Data Security Concerns

- **Skepticism and Trust:** There is a mix of skepticism and trust regarding data privacy and security, with some respondents expressing confidence in brand claims and others remaining wary of potential eavesdropping and data breaches.
- **Desire for Control and Transparency:** Respondents desire more control over their data and full disclosure of how it is used, suggesting that transparency and user empowerment could alleviate some privacy concerns.

Ease of Use and Reliability

- **Simple Setup and Compatibility:** The ease of installation and the ability to integrate with other devices and systems are important factors in the adoption of smart home technology.
- **Consistent Performance:** Devices that work reliably and as advertised are highly valued, with any difficulties in operation or setup being notable pain points for users.

Expectations and Experience

- **Security and Convenience Expectations:** Before purchasing, respondents expected their smart home devices to enhance security and convenience, and for many, these expectations have been met or exceeded.
- **Trust Over Time:** Trust in smart home devices has generally increased over time as users become more familiar with the technology and its benefits, though some remain cautious.





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KEY INSIGHTS

Future Improvements and Advancements

- **Enhanced Functionality:** Respondents look forward to advancements in smart home devices that could offer clearer connectivity, better integration with other home appliances, and improved entertainment options.
- **Security Enhancements:** There is a desire for stronger security measures to prevent unauthorized access and to ensure that personal data remains protected.

Advice for New Users

- **Research and Awareness:** Respondents advise new users to thoroughly research devices, understand privacy terms, and ensure they are comfortable with the device's capabilities and security measures before making a purchase.
- **Start Small and Learn:** For those considering their first smart home device, the recommendation is to start with a basic model, become familiar with its functions, and gradually integrate more devices as comfort with the technology grows.





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PROJECTIVE ANALYSIS

How would you feel if you were unable to use your smart home devices for a day?:

Analysis of the responses reveals a range of emotions and practical concerns related to the temporary loss of smart home devices. Respondents expressed feelings of anxiety, frustration, and a sense of being less safe without their devices. The loss of convenience and the interruption of daily routines were also mentioned, with some respondents indicating that they would miss the peace of mind and security provided by their devices. However, a few respondents also indicated that they could manage without the devices for a day, suggesting a level of resilience and adaptability. Overall, the sentiment leans towards a reliance on smart home devices for security, convenience, and routine, with a temporary inability to use them causing discomfort and concern.





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PROJECTIVE ANALYSIS

Imagine you are a smart home device, how would you make the life of your owner easier?:

Responses suggest that if respondents were smart home devices, they would focus on enhancing security, providing convenience, and assisting with daily tasks. Many respondents emphasized the importance of alerting owners to potential security breaches and ensuring data protection. They also mentioned the desire to streamline household chores, offer reminders, and integrate with other devices and systems to facilitate a more efficient and organized lifestyle. Some respondents highlighted the need for smart home devices to adapt to the user's habits and preferences, suggesting a personalized approach to making the owner's life easier. The overall theme is that as a smart home device, respondents would prioritize functionality, reliability, and user-centric features to improve the quality of life for their owners.





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HUMAN KEY QUOTES

"I am aware i go through and choose the data that they can collect and i always read the users agreements. i would never agree to user agreement that i had an issue with it doesn't bother me, but i understand companies need certain data to make better products and more tailored to their users."

Age 39, Male

"I think they have definitely made me feel safer and every night i have a peace of mind knowing my house is secure, also having an alexa just brings general joy especially having music around me whenever i need it she's also great at updating me on the weather in the morning so i can dress myself and my child appropriately for the day without having to step outside or open my phone to an app"

Age 32, Female

"It has to be my smart security camera there's nothing better in life then knowing my family is safe i can always access my cameras 24/7 and know exactly what's going on in and outside of my home i like that it sends notifications to my phone whenever there is motion and automatically records that motion"

Age 32, Female

"My smart vacuum was my first purchase. i was motivated to get it because it made cleaning easier while recovering from illness. i like that it runs on its own and can follow a schedule. "

Age 28, Male

"I'd enhance comfort unless that compromised my privacy or security. for example, a smart device that works well but is easy to hack would not be one i would purchase. "

Age 28, Male

"My major concerns would be privacy risks, someone hacking them and getting my information, things like that. i typically go through the settings and ask them to not track or share information. i do wish that was the default though. "

Age 28, Male





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HUMAN KEY QUOTES

"I trust them for the most part, but not completely. i think they do the bare minimum that they need to and won't respect anything that there isn't specific guidelines against "

Age 28, Male

"I think being able to connect to a google calendar on her or an apple calendar would do wonders if i was a smart home device. i think listing all your events either daily monthly or weekly right in the morning would be a great feature. i also think that some companies should add wi-fi calling beyond the app. it does get frustrating when i want to call somebody and i don't have my phone because i lose it and i can't call from my alexa unless it's my husband or myself which is helped multiple times but in reality if i needed to call 911 i can't ask alexa to do that. well, i'm pretty sure i can't. "

Age 30, Female

"So up until recently i've been very trusting on my alexa. at first i was very skeptical but as the years went on, i realize there was really nothing to worry about so i definitely trust it more this year. however, i noticed that there's a bunch of ai and different gadgets out there right now and so it probably make life a lot easier for hackers to get into peoples data. get into peoples accounts and steal their stuff, i did change my passwords and i was proactive this year, so i think i'm good but you just never know "

Age 30, Female

"Absolutely. those mics pic up everything even when you don't want it to. which is why i don't use voice enabled smart devices"

Age 50, Female

"When i leave the house, my vacuum runs as soon as my door shuts. my oven turns on at 4pm to start warming up for dinner"

Age 50, Female





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HUMAN KEY QUOTES

"I don't think i've ever experienced any trouble except for when my alexa wasn't answering back for a little while and i rebooted it and it worked fine afterwards "

Age 25, Female

"I've become more trusting towards them, i use to try to stay away from it but they help a lot and don't mess up my daily life they actual help surprisingly "

Age 25, Female

"I use a smart device to set an alarm in the morning. i then get my children ready and begin working from home. i have a ring camera that lets me see my front door throughout the day and i also have an alert on my smart device to let me know if someone is at my door or if my appliances have an alert. an example is my washing machine in am alerted when the load is finished "

Age 41, Female

"I think improving my security. i like that i can be alerted while home alone and working from home if there is anyone at my door. i also like that i am alerted while my kids are at home who is at the door, or if any of my kids get outside with out me knowing "

Age 41, Female

"At first i wasn't sure about them. i didn't see a huge need and was sure it was constantly being listened to and we were listening in on. i don't feel that way now and do see the advantage of having them "

Age 41, Female

"I trust them to an extent, but not completely. i know that certain companies like facebook have been questioned for privacy issues. and yes, there was one specific incident on the news that said a ladies security system had somebody listening in and that somebody was speaking back to her on it."

Age 34, Male





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HUMAN KEY QUOTES

"I like the blink smart home device because of the nice quality camera it provides, it's weatherproof and it allows you to talk through it if need be. this helps increase the convenience factor in my daily routines "

Age 28, Male

"Before purchasing smart home devices i expect to gain a sense of comfort and security from them, after i purchased a smart security device my expectations were surpassed. the device worked far better than anticipated and provide a nice sense of security and peace "

Age 28, Male





**REACH OUT TO US IF YOU HAVE
FURTHER QUESTIONS ABOUT THIS
REPORT**

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