

Eureka!
ILLUMINATING RESEARCH

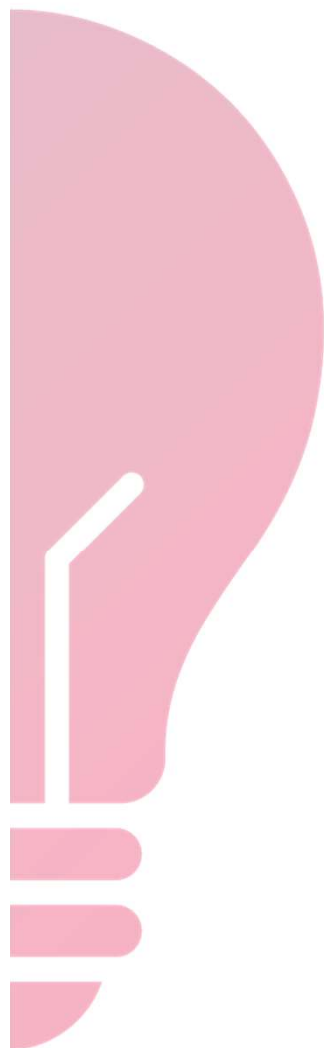


Eureka! Moment Report
Installing Smart Technology

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proceed

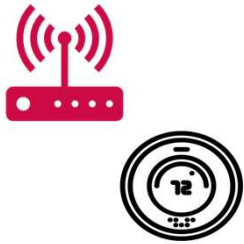


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As home tech becomes more advanced and price points more competitive, the dream of the 'connected home' continues to become more of a reality.

Current understanding of consumer attitudes and behaviours towards installing smart technology systems appears fairly unsophisticated at the moment. We wanted to fill that gap.



Online fieldwork was conducted late February/early March by Eureka! Research



A total of four survey questions as part of our exclusive 'mini poll' of homeowners in the UK.



In total the results give us a measure of interest and attitudes to smart technology systems in the home.



946
households

946 households carried out the survey across the United Kingdom.

The sample is broadly representative by age and gender although some caution should be exercised when interpreting smaller base sizes

Main findings

Brands are starting to resonate:



Would contact a smart tech brand direct (e.g. Nest, Hive)

4 in 10



3 in 10 would use an online service (e.g. Check a Trade, Local Heroes)



1 in 4 would contact a professional tradesperson

Homeowners would pay for a professional:



Smart tech expert installer/engineer

59%



Electrician

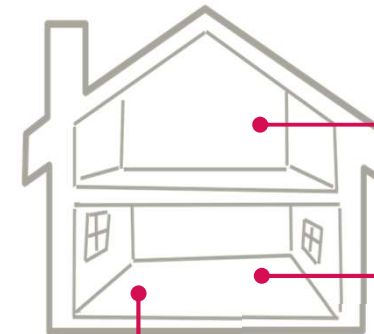
14%



Householder / DIY

13%

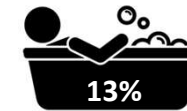
Rooms most naturally suited:



Bedrooms (34%)

Kitchen (53%)

Living space (72%)



13%

Little 'fit' with bathroom

Smart Technology

Channels

In the home

Installation

Product

Most popular product types:



Security



Lighting

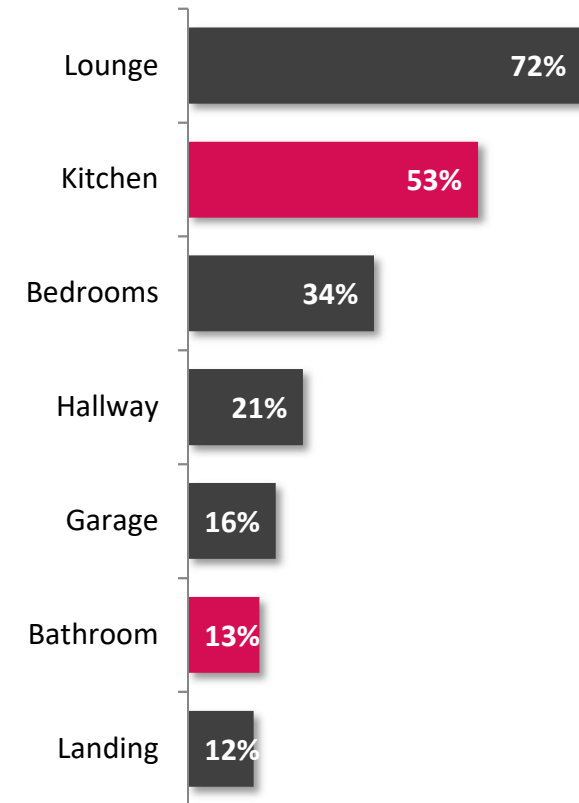
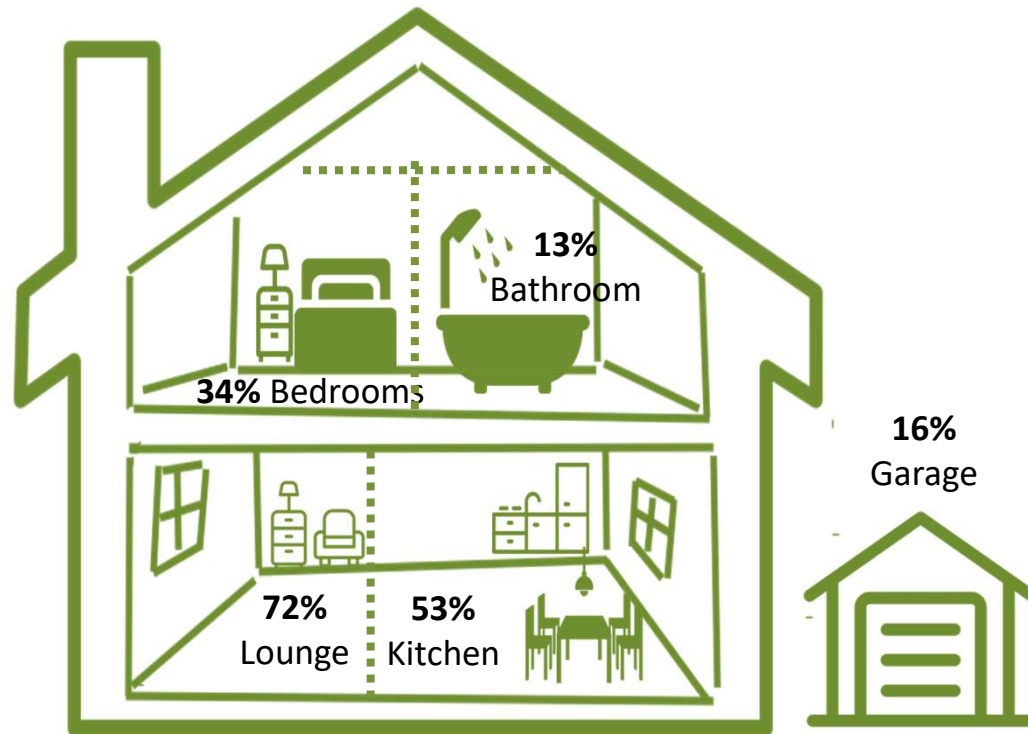


Heat control

Significant work to do for bathroom products such as smart taps, showers, toilets



Where in the home is smart technology best suited?



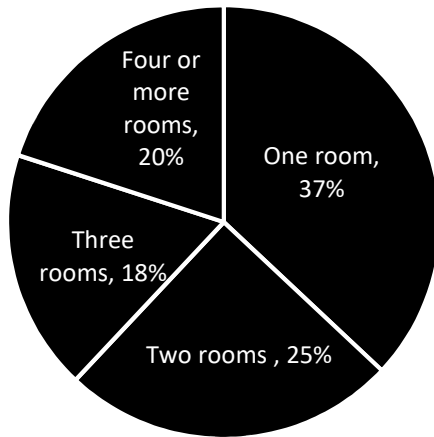
55% of homeowners identify the kitchen or bathroom as being suited to having smart technology installed



The biggest opportunities for smart technology systems



Although clearly there are some rooms in the home more naturally associated with smart tech solutions currently, our data show that consumers are potentially receptive to the proposition all across their homes



Smart Tech is seen to have value all across the home. On average consumers identify 2 rooms. This increases to 3 rooms for younger homeowners aged <35 years of age



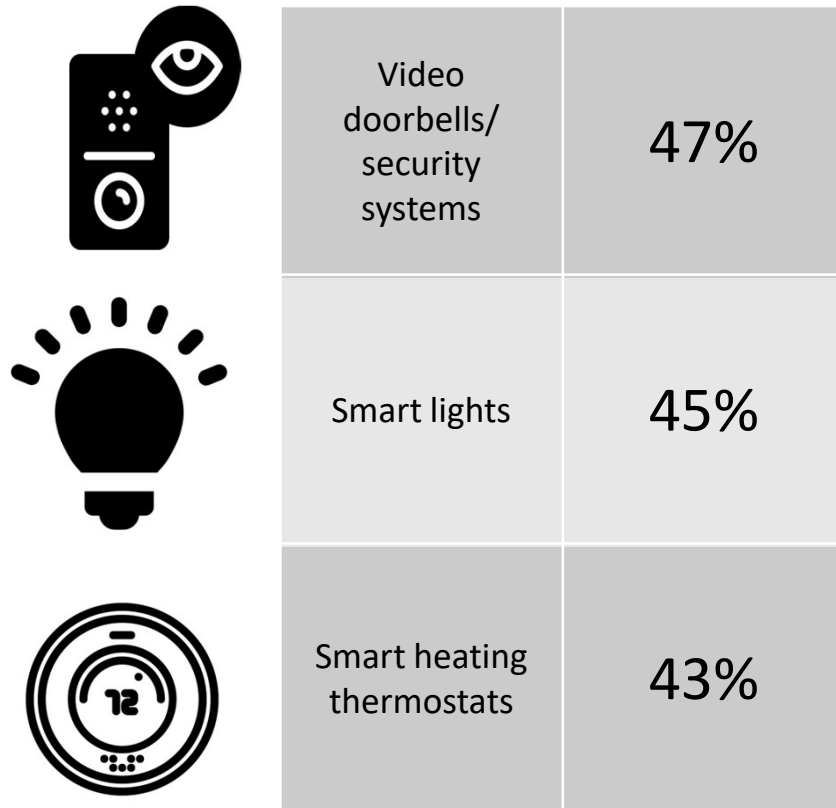
Lounge/living space	Kitchen space
The room of the house most associated with smart tech systems	The second most popular room in the home
This is particularly the case for mid-aged householders – those aged 45-54 years (81%)	Younger householders are more likely to associate smart tech with their kitchen space (61%)
Female consumers, often the key decision maker in the household, are more likely to associate smart tech with the lounge	Male and female consumers are equally likely to say that the kitchen is an area they would associate with smart tech solutions



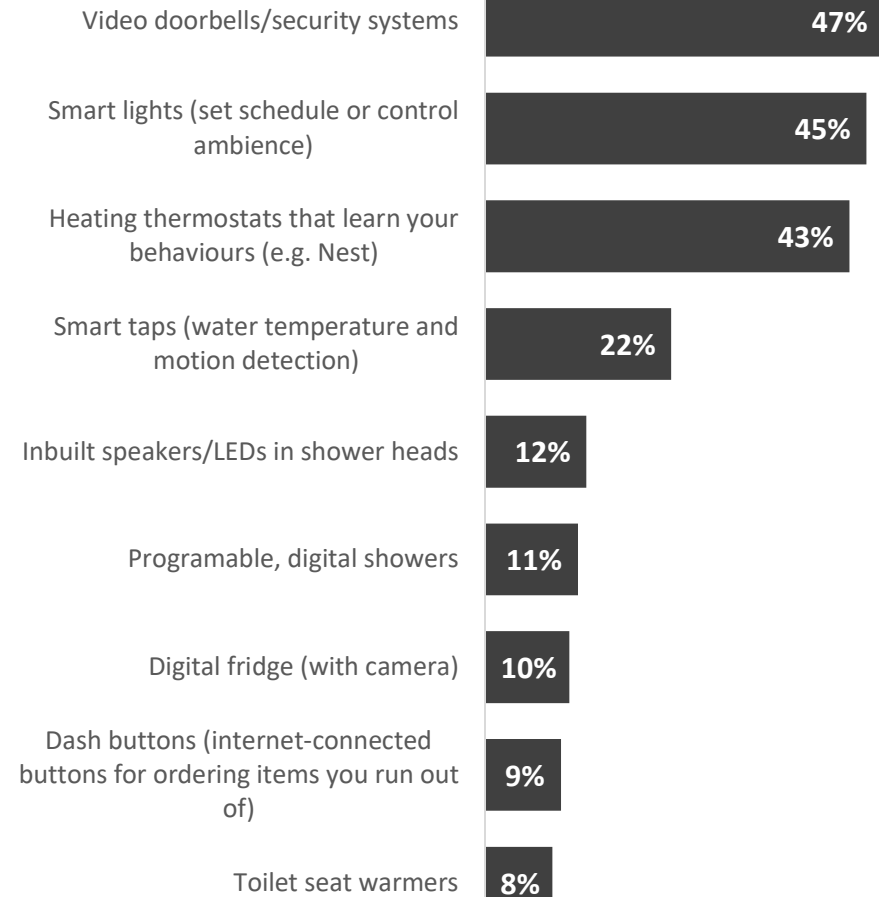
Mature homeowners, aged 65+ are least likely to select any rooms for smart tech – but two thirds still select the lounge living space, representing a significant opportunity



Consumer interest in home technology



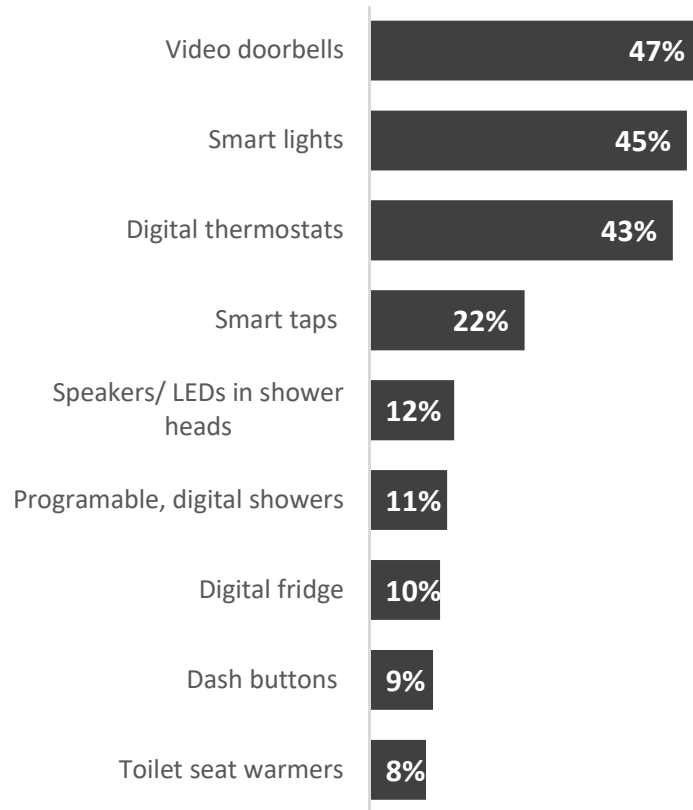
Around half identify security systems and over 4 in 10 associate smart tech with lighting and heating.



Consumer interest in home technology: different homeowners



Bathroom smart tech is seen as most interesting by those in the youngest age category (under 35's)



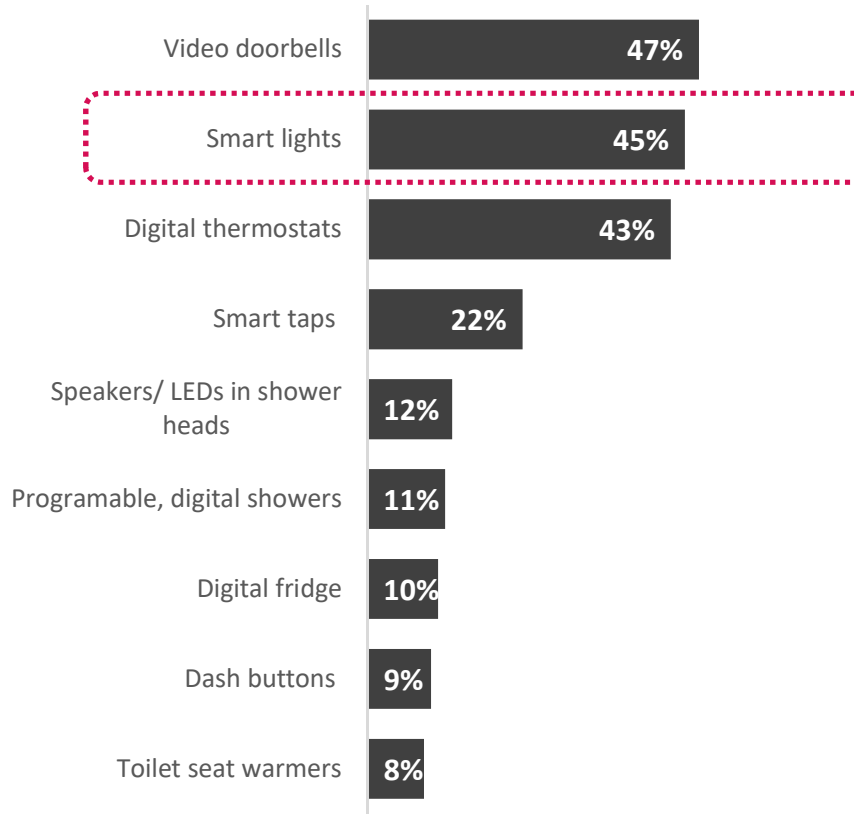
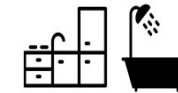
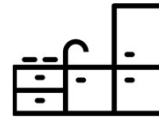
	Men	Women	Under 35s	35-54 yrs	55s +
Video doorbells	49%	46%	50%	49%	46%
Smart lights	44%	46%	45%	54%	38%
Digital thermostats	43%	42%	46%	50%	37%
Smart taps	21%	24%	28%	28%	16%
Speakers/ LEDs in shower heads	13%	10%	31%	16%	4%
Programable, digital showers	11%	11%	18%	14%	7%
Digital fridge	12%	8%	21%	12%	7%
Dash buttons	11%	6%	21%	11%	4%
Toilet seat warmers	8%	8%	17%	9%	5%
	500	446	121	336	489



Consumer interest in home technology: across the home



Smart lighting is of interest to more of those identifying bathrooms and kitchens as locations for smart tech



	Kitchen	Bathroom	Kitchen/ Bathroom
Video doorbells	56%	42%	55%
Smart lights	55%	54%	54%
Digital thermostats	54%	46%	54%
Smart taps	28%	43%	28%
Speakers/ LEDs in shower heads	15%	28%	16%
Programable, digital showers	15%	28%	16%
Digital fridge	15%	25%	15%
Dash buttons	10%	21%	11%
Toilet seat warmers	9%	18%	9%
	501	126	522



Installing smart technology

Many of the leading consumer-facing brands in this sector are already offering successful installation models to householders



nest Certified Professional



As well as many smaller businesses entering the market in an independent, direct-to-consumer capacity



Consumers appear to prefer a dedicated installer in this field, with less than 1 in 7 indicating that they would do it themselves



Smart tech expert installer/engineer

59%



Electrician

14%



Householder / DIY

13%



Another tradesperson

4%

Plumber

1%



Routes to market



Contact a smart tech manufacturer directly (e.g. Nest, Hive)

41%



Use a search engine (e.g. Google)

39%

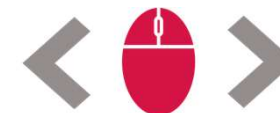
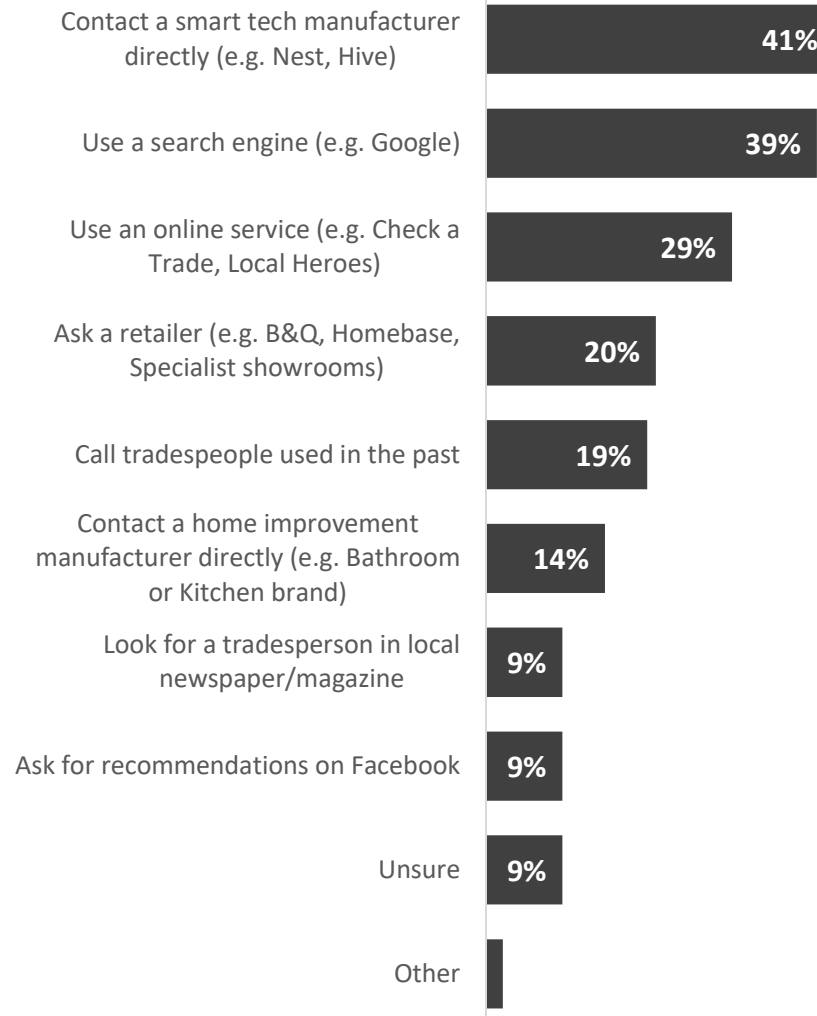


Use an online service (e.g. Check a Trade, Local Heroes)

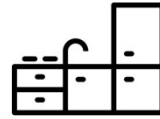
29%



25% would contact a tradesperson – either through social media, newspaper, or someone previously used



Routes to market: across the home



	Lounge	Kitchen	Bathroom	Bedrooms	Garage
Contact a smart tech manufacturer directly (e.g. Nest, Hive)	45%	47%	46%	51%	51%
Use a search engine (e.g. Google)	42%	44%	40%	46%	39%
Use an online service (e.g. Check a Trade, Local Heroes)	30%	36%	37%	38%	40%
Ask a retailer (e.g. B&Q, Homebase, Specialist showrooms)	21%	23%	23%	26%	26%
Call tradespeople used in the past	20%	21%	26%	23%	31%
Contact a home improvement manufacturer directly (e.g. Bathroom or Kitchen brand)	14%	19%	29%	22%	30%
Look for a tradesperson in local newspaper/magazine	9%	11%	13%	11%	11%
Ask for recommendations on Facebook	10%	13%	20%	13%	12%
<i>Base:</i>	<i>684</i>	<i>501</i>	<i>126</i>	<i>320</i>	<i>151</i>



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Key reflections



Key findings for brands in this space

Implications for kitchen brands

Encouragingly, over half of consumers view the domestic kitchen as a suitable location for smart technology

Specific products in the kitchen space such as dash buttons and digital refrigeration appliances currently have relatively little resonance – this may quickly change as cheaper third-party fridgcams, for instance, enter the market

Brands in the kitchen space need to keep ahead of the curve and work hard in delivering product that offers clear and tangible benefits to end users

The eventual winners will be manufacturers that integrate smart tech functionality into appliances at a price that is compelling to consumers

Implications for bathroom brands

Relatively few homeowners currently see the bathroom as a ‘natural’ space for smart tech although appetite does appear to increase within the youngest age category

Although smart taps appear of limited appeal currently, we find that smart lighting is specifically of interest to those who see that bathroom generally as a part of the house for smart tech. This could be a gateway product for bathroom brands and installers in that sector

Brands should be looking at how they integrate smart products with mainstream search and control tech like Alexa. Consumers will demand full connectivity across the home rather than having separate systems for different rooms

Smart lighting and smart thermostats have obvious end user benefit - full control on the move and budget saving – which is contrast to specific products such as speakers in shower heads. Brands therefore need to take a long hard look at which innovations to support in the longer term



Contact Eureka!

Richard & Dave (Directors and founders of **Eureka! Research**) focus on the home improvement sector, specifically including the kitchens and bathrooms sector and merchant and retail distribution channels

We use both traditional and cutting-edge research methodologies to get closer to what consumers, tradespeople or retailers think about the market and new product.

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