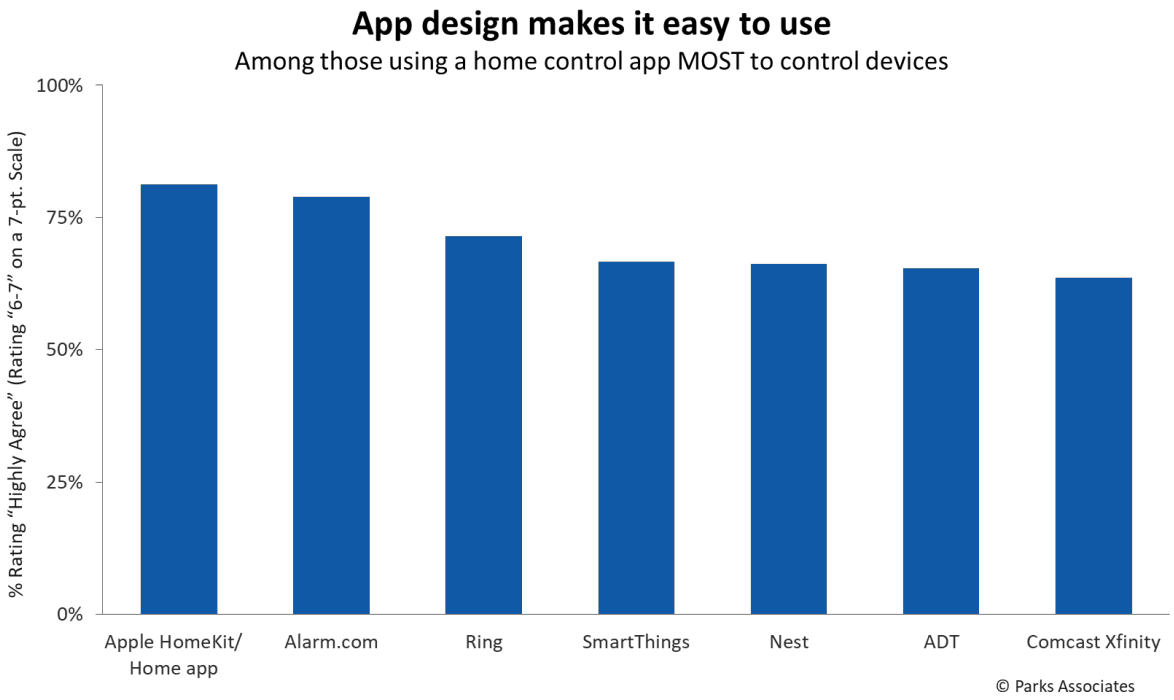
All Apps Aren't Equal: Smart Home User Experiences

SERVICE: SMART HOME PRODUCTS AND SERVICES

4Q 2021



SYNOPSIS

This consumer research provides an in-depth examination of the user experience among smart home app users. It quantifies consumer preferences and pain points, the value of unified versus endpoint solutions, app usage patterns by use case and contexts, and the relative importance of the app experience for purchasing and consumer satisfaction. The research also explores preferences for modes of interaction, such as voice versus touch, and relative value of multiple apps for varying smart home tasks.

ANALYST INSIGHT

> "Consumers are buying more and more smart home devices, and they are open to adopting a single brand, so there could be substantial same-store sales or customer lifetime value if a unified app is adopted and compatible new devices are developed. Smart home players seeking to play that unifying role may be most successful in crafting messaging that speaks deeply to certain consumer segments rather than a message designed for the masses."
>
> — Chris White, *Senior Analyst,* Parks Associates

Number of Slides: 72

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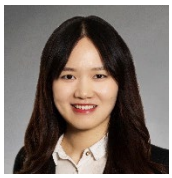

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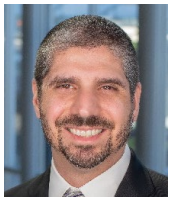

Chris White, Senior Analyst

CONSUMER ANALYTICS

QUANTIFIED CONSUMER

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- Effort Required to Solve the Problems
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- Primary Control Method of Smart Safety & Security Device
- Primary Control Method of Lighting & Home Management Device

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- Personal Smartphone Operation System by Smart Home Device Ownership
- Family Smartphone OS Segment
- High Agreement: Assistant is Easy to Communicate With
- Voice Assistant Usage by Personal Smartphone OS
- Voice Assistant Control Adoption by Smart Home Device

The Preferred App Provider

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- Reasons for Choosing Source of a Single Unified App
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- Importance of Smart Home Device Integration for Future Purchase
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Appendix

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ATTRIBUTES

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