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Eureka! Moment Report

Installing Smart Technology

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 in conjunction with Installer Magazine

Installer

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

A total of 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	Electrician	Householder / DIY
59%	14%	13%

Smart Technology

Channels

In the home

Installation

Product

Rooms most naturally suited:

Bedrooms (34%)

Kitchen (53%)

Living space (72%)

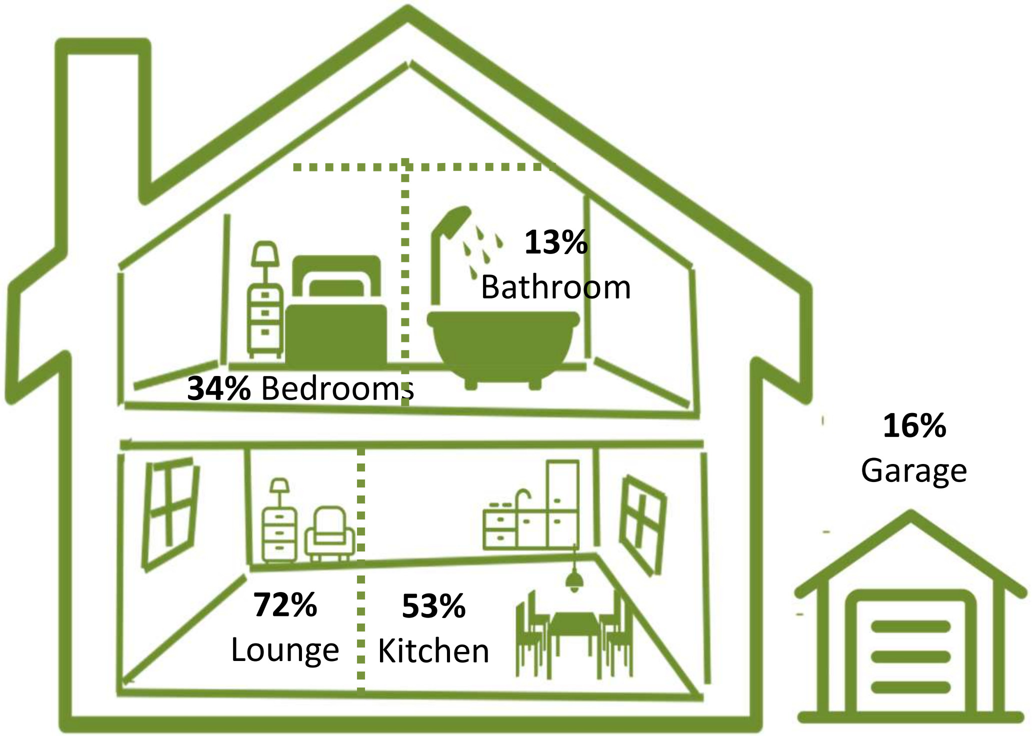
13% Little ‘fit’ with bathroom

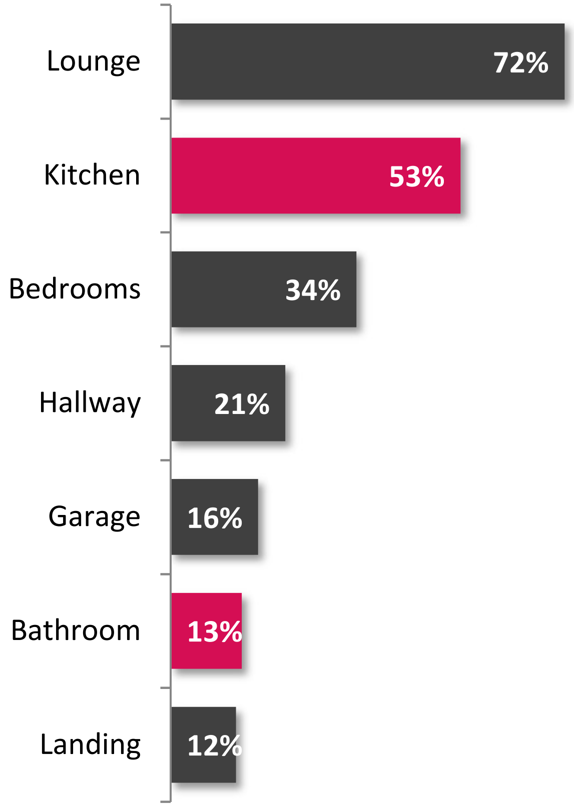
Most popular product types:

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 <u>**or**</u> bathroom as being suited to having smart technology installed

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Q1. Which of the following rooms of the home do you think are best suited to having smart technology systems installed?
Source: Consumer online poll March 2018 (Base: 946 homeowners)

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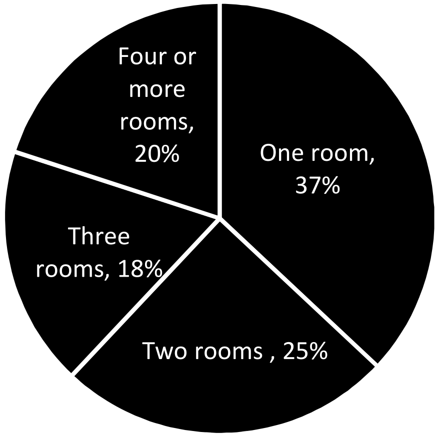
The biggest opportunities for smart technology systems

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



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

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

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

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Q1. Which of the following rooms of the home do you think are best suited to having smart technology systems installed?
Source: Consumer online poll March 2018 (Base: 946 homeowners)

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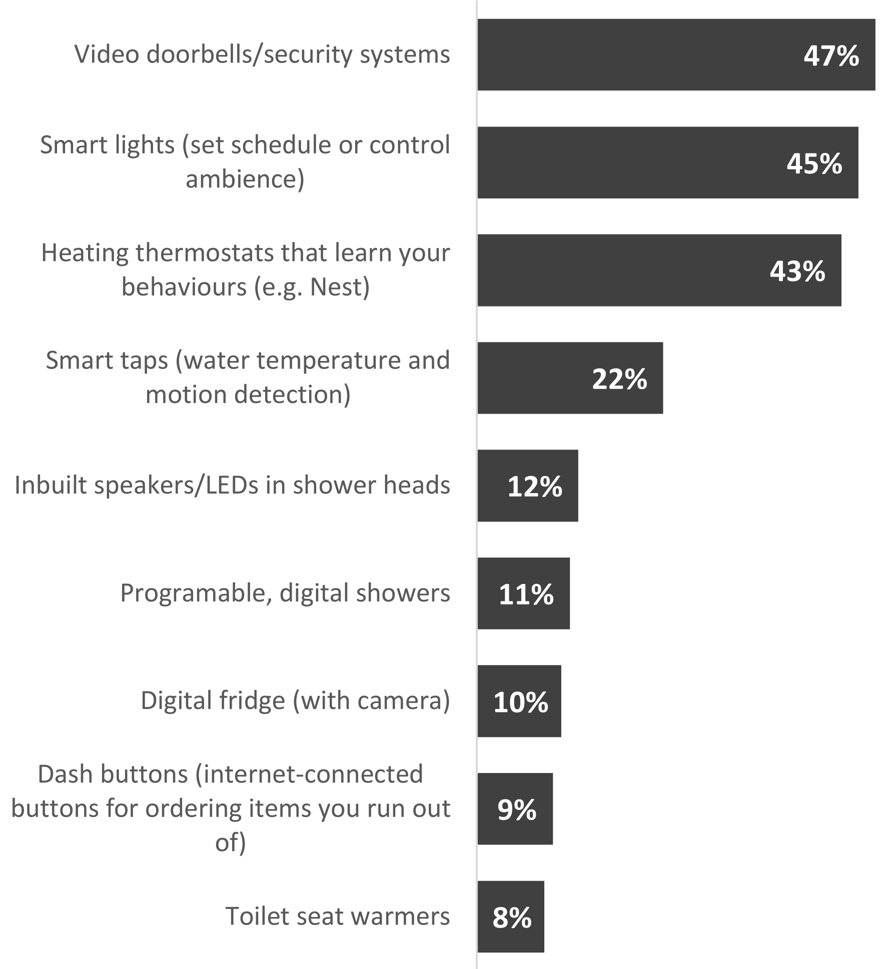
Interest in home technology

Video doorbells/ security systems	47%
Smart lights	45%
Smart heating thermostats	43%

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



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Q2. Which of the following types of smart technology would you be interested in installing in your home in the next 1-2 years?
Source: Consumer online poll March 2018 (Base: 946 homeowners)

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Interest in home technology

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

	Total	Men	Women	Under 35s	35-54 yrs	55s +
Video doorbells	47%	49%	46%	50%	49%	46%
Smart lights	45%	44%	46%	45%	54%	38%
Digital thermostats	43%	43%	42%	46%	50%	37%
Smart taps	22%	21%	24%	28%	28%	16%
Speakers/ LEDs in shower heads	12%	13%	10%	31%	16%	4%
Programable, digital showers	11%	11%	11%	18%	14%	7%
Digital fridge	10%	12%	8%	21%	12%	7%
Dash buttons	9%	11%	6%	21%	11%	4%
Toilet seat warmers	8%	8%	8%	17%	9%	5%
		500	*446*	*121*	*336*	*489*

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Q2. Which of the following types of smart technology would you be interested in installing in your home in the next 1-2 years?

Source: Consumer online poll March 2018 (Base: 946 homeowners)

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Interest in home technology

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

		Kitchen	Bathroom	Kitchen/ Bathroom
Video doorbells	47%	56%	42%	55%
Smart lights	45%	55%	54%	54%
Digital thermostats	43%	54%	46%	54%
Smart taps	22%	28%	43%	28%
Speakers/ LEDs in shower heads	12%	15%	28%	16%
Programable, digital showers	11%	15%	28%	16%
Digital fridge	10%	15%	25%	15%
Dash buttons	9%	10%	21%	11%
Toilet seat warmers	8%	9%	18%	9%
		501	*126*	*522*

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Q2. Which of the following types of smart technology would you be interested in installing in your home in the next 1-2 years?

Source: Consumer online poll March 2018 (Base: 946 homeowners)

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Installing smart technology

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

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

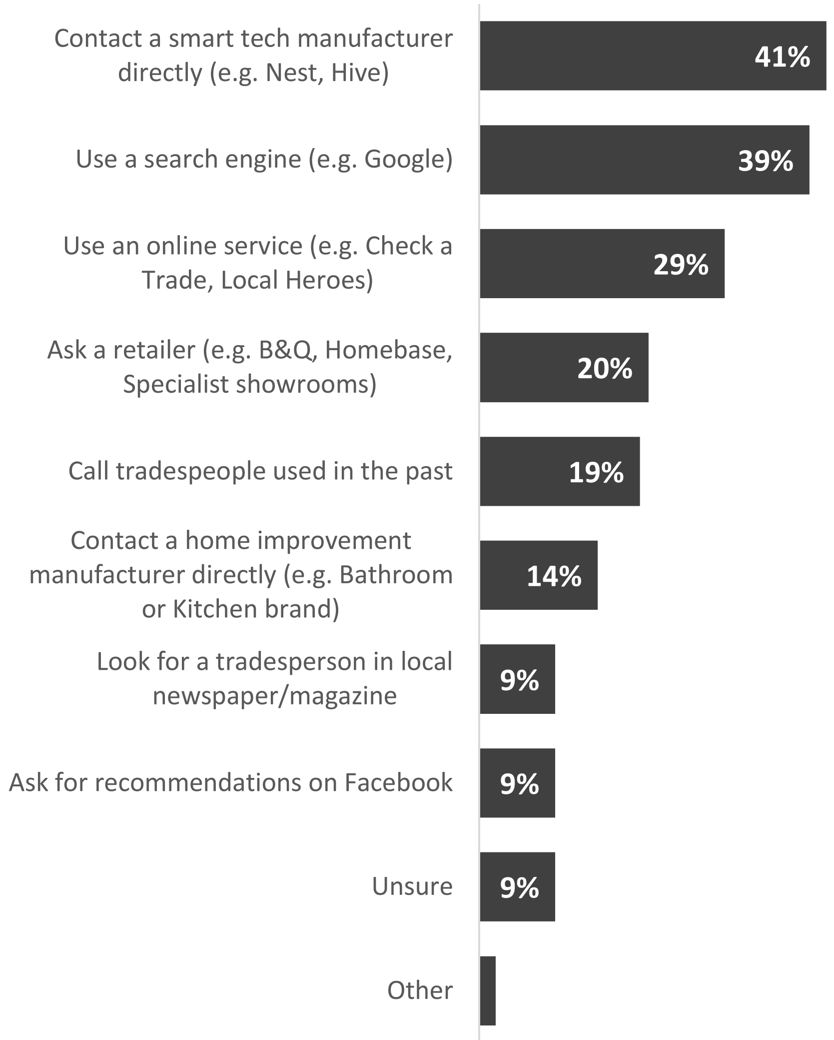
Smart tech expert installer/engineer	Electrician	Householder / DIY	Another tradesperson	Plumber
59%	14%	13%	4%	1%

Q3. Who do you think is best placed to install smart technology in the home?
Source: Consumer online poll March 2018 (Base: 946 homeowners)
(Unsure=10%)

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



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Q4. If you wanted to get advice/get a quote from someone who installs smart technology, which of the following would you be most likely to do?
Source: Consumer online poll March 2018 (Base: 946 homeowners)

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Advice/quote routes differ slightly according to the room considered

	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%
Base:	*684*	*501*	*126*	*320*	*151*

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Q4. If you wanted to get advice/get a quote from someone who installs smart technology, which of the following would you be most likely to do?
Source: Consumer online poll March 2018 (Base: 946 homeowners)

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Key reflections

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 fridgecams, 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

Key findings for installers in the trade

- Consumers identify security as a key strength of smart technology in the home, and a significant proportion identify with heating and lighting which have received significant marketing through established industry players
- Smart lighting is strongly associated with the bathroom and kitchen, an opportunity for installers who are Part P registered or work with qualified electricians
- Six in ten identify a Smart Tech expert installer/engineer as the person they would employ to install this in the home. Clearly there is an opportunity for skilled installers to brand themselves with this capability to tap into this area of work
- One quarter of homeowners would contact a tradesperson, either through social media, newspapers or prior experience. Relatively few would have the confidence to install smart systems themselves
- A large proportion of consumers would use online tools to locate a suitable tradesperson to install Smart Tech, emphasising the importance of ensuring installer businesses are strongly positioned digitally
- Interestingly, warmth for online services such as Check-a-Trade is stronger in this category than we see in more traditional plumbing, potentially consumers are seeking additional reassurance from established organisations for this purchase and hence worth consideration of installers focusing on this category
- Although the bathroom is not currently associated that highly with smart tech, those who consider it are more likely to seek out a tradesperson they have used in the past or ask for recommendations from their contacts on Facebook

Contact Eureka!

Richard & Dave (Directors and founders of **Eureka! Research**) have focused on the KBB sector for many years and struggle to believe there are others with more rounded sector experience.

We've worked with sanitaryware brands, those focused on brassware, kitchen door suppliers, shower suppliers, plus heavyweight merchants, providing us with an enviable knowledge base.

Follow us on Twitter for more **Eureka! Moments** and case studies relevant to your industry. Or please drop us a line if you want more information about this topic.

We're extremely grateful to our colleague Fiona Bowyer, Senior Marketing Professional in the KBB sector, for her invaluable thoughts and insight when preparing this report

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