

Report Price: £3695 | \$4995 | €4400

ne above prices are correct at the time of publication, but are subject to change due to currenc<u>y fluctuations.</u>

This report looks at the following areas:

Many factors such as energy costs, functionality, efficiency and convenience have contributed and will continue to contribute to the rising implementation of smart home products in the homes of Canadian consumers.

While there are some barriers to smart home ownership, such as perceived high cost to purchase, worry of data being tracked and a lack of knowledge on the utility of such devices, there is still an opportunity for smart brands in the category to entice the majority of consumers who are interested. Manufacturers will likely benefit the greatest by offering convenience, cost/ energy savings, entry-level pricing and devices, control and secure platforms for device operation.

- Key reasons for disinterest point to data privacy and affordability
- Hardware brands gain most trust
- Nearly a third of consumers believe smart speakers spy on them

66

"The majority of Canadian consumers are interested in making their home more 'connected' by using smart devices. The growing desire by the consumer for convenience, knowledge of device/appliance energy consumption, security and energy and money savings will support the progression of the smart home market."

- Andrew Zmijak, Research Analyst

Buy this report now		
Visit	store.mintel.com	
EMEA	+44 (0) 20 7606 4533	
Brazil	0800 095 9094	
Americo	as +1 (312) 943 5250	
China	+86 (21) 6032 7300	
APAC	+61 (0) 2 8284 8100	

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- Definitions

EXECUTIVE SUMMARY

- The issues
- Key reasons for disinterest point to data privacy and affordability

Figure 1: Reasons for disinterest in a connected home, April 2018

- Hardware brands gain most trust
 Figure 2: Trust in smart home brands, April 2018
- Nearly a third of consumers believe smart speakers spy on them
- Figure 3: Attitudes towards smart speakers, April 2018
- The opportunities
- Most Canadians are interested in making their home more 'connected'

Figure 4: Interest in smart home connectivity, April 2018

 Learning about in-home device consumption is important to most

Figure 5: Attitudes towards smart home devices (select), April 2018

- A connected home helps reduce energy costs
 Figure 6: Attitudes towards smart home devices (select), April 2018
- What it means

THE MARKET - WHAT YOU NEED TO KNOW

- Estimated growth of 18-44s will benefit the category
- High electricity costs may drive people towards smart home devices
- Smartphone ownership is high
- Improved perceptions of financial health a boon for the category
- Millennials are moving into prime home buying years

MARKET FACTORS

Projected growth of 18-44s will benefit the category
 Figure 7: Projected trends in the age structure of the Canada population, 2014-19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- High electricity costs may push people towards smart home devices
- Smartphone ownership is high Figure 8: Smartphone ownership, by age, January 2018
- Improved perceptions of financial health positive for category
- Millennials are moving into prime home buying years

KEY PLAYERS – WHAT YOU NEED TO KNOW

- Retailers highlight their smart home offerings
- Amazon promotes its smart speaker range
- Ownership of smart home devices has risen
- Security concerns linger
- New smart home innovations and investment

MARKETING AND ADVERTISING

- Retailers spotlighting their smart home variety
 Figure 9: Home Depot, direct email, November 2017
 Figure 10: Bed Bath & Beyond, acquisition email, October 2017
- Amazon promotes its smart speaker range
 Figure 11: Amazon Echo Dot, acquisition email, May 2018
 Figure 12: Amazon Echo Spot, acquisition email, May 2018
- Nest Hello Video doorbell and Nest Cam IQ garner attention

Figure 13: Prom Night – Nest, March 2018 Figure 14: Nest Cam IQ – Now even smarter with the Google Assistant built in, March 2018

WHAT'S WORKING?

- Ownership of smart home devices has risen
- Hardware brands are most trusted

WHAT'S STRUGGLING?

- Security concerns persist
- Affordability a major reason for disinterest

WHAT'S NEXT?

- New smart home innovations and investments
- Model smart homes

THE CONSUMER – WHAT YOU NEED TO KNOW

 TVs and smoke/carbon monoxide detectors are the most popular smart home devices

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Most are interested in making their home more 'connected'
- Top reasons for disinterest point to data privacy and price
- Samsung is the most trusted smart home brand
- Most find it important to learn about their in-home device's consumption
- The largest share of consumers believe smart speakers spy on them

SMART HOME DEVICE OWNERSHIP AND INTEREST

 TVs and smoke/carbon monoxide detectors are the most popular smart home devices

Figure 15: Ownership of/interest in purchasing smart home devices, April 2018

 Men more likely to own/display an interest in smart home products

Figure 16: Ownership of/interest in purchasing smart home devices (combined), by gender, April 2018

• Younger consumers demonstrate greater interest in smart home devices

Figure 17: Ownership of/interest in purchasing smart home devices (combined), 18-44s vs over-45s, April 2018

• Parents among most likely to be interested in a smart home Figure 18: Get to know Rogers Smart Home Monitoring, September 2016

Figure 19: Ownership of/interest in purchasing smart home devices (combined), parents vs overall, April 2018

 Most Canadians are interested in making their home more 'connected'

Figure 20: Interest in smart home connectivity, April 2018

REASONS FOR DISINTEREST IN A CONNECTED HOME

- Top reasons for disinterest point to data privacy and price Figure 21: Reasons for disinterest in a connected home, April 2018
- Disinterest more likely to arise from lack of knowledge among older groups

Figure 22: Reasons for disinterest in a connected home, 18-44s vs over-45s, April 2018

TRUSTED SMART HOME BRANDS

Samsung is the most trusted smart home brand
 Figure 23: Trust in smart home brands, April 2018
 Figure 24: Trust in smart home brands, 18–44s vs over-45s,
 April 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Parents more likely to trust most brands

Figure 25: Trust in smart home brands, parents vs overall, April 2018

ATTITUDES TOWARDS SMART HOME DEVICES

Most find it important to learn about their in-home device's consumption

Figure 26: Attitudes towards smart home devices (select), April 2018

 Many associate a connected home with offering improved wellbeing

Figure 27: Quality of life-related attitudes towards smart home devices, April 2018

- A connected home saves consumers money
 Figure 28: Attitudes towards smart home devices (select),
 April 2018
- Most would prefer to control smart devices via app Figure 29: Attitudes towards smart home devices (select), April 2018
- Close to a third of consumers believe smart speakers spy on them

Figure 30: Attitudes towards smart speakers, April 2018 Figure 31: Attitudes towards smart speakers (select), 18-44s vs over-45s, April 2018

Figure 32: Attitudes towards smart speakers (select), parents vs overall, April 2018

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Consumer qualitative research
- Abbreviations and terms
- Abbreviations

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com	
emea	+44 (0) 20 7606 4533	
Brazil	0800 095 9094	
Americas	+1 (312) 943 5250	
China	+86 (21) 6032 7300	
APAC	+61 (0) 2 8284 8100	





About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **mintel.com.**