



# Smart Home - China - November 2020

Report Price: £3695 | \$4995 | €4400

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

## This report looks at the following areas:

- Green energy, smarter sustainability, smarter home
- Cross-category collaborations
- Smarter home for the ageing society

The volume of the retail market of the smart home industry is estimated at 62 million in 2016, and is estimated to hit 158 million in 2020 at a CAGR at 26%. There are huge opportunities provided by IoT, 5G technology and upgrade desires which will push the industry forward.

COVID-19 had a short-term sales impact on the domestic market as customers were hesitant to indulge in high-ticket spending. Consumer confidence towards smart home appliances can have added quality to improve their existence, while continuously pushing the possibilities and willingness to update to consumer transactions. The most significant factor in shaping the introduction of smart home technology for brands and manufacturers still lies in functionality and user operation experiences.



“The smart home market retained a positive outlook under the influence of COVID-19, as the market has continued to grow at a steady speed over the past four years, fuelled by consumers’ willingness to upgrade their devices, IoT technology and the 5G applicable penetration. Overall, the market is still at its infancy; sectors such as smart security, smart lighting and smarter appliances will drive market

innovation forward.” – Amy

Buy this report now  
Visit [store.mintel.com](https://store.mintel.com)

Analyst

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

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**
- **Covered in this Report**

### EXECUTIVE SUMMARY

- **The market**
  - Figure 1: Short, medium and long-term impact of COVID-19 on smart home, November 2020
  - Figure 2: Estimated retail sales volume for smart home China, 2016-20
  - Figure 3: China's smart home market retail unit sales share, by product category, 2016-20
- **Companies and brands**
- **Key players are chasing customers through their ecosystems**
- **Crossing board players**
- **Expertise by home appliance brands**
- **The consumer**
- **Smart home still lies in entertainment**
  - Figure 4: Purchase behaviour and interest in smart home, September 2020
- **Association with life quality improvement**
  - Figure 5: Purchase motivation for smart home, September 2020
- **Various preferences in controlling methods**
  - Figure 6: Control preference for smart home devices, September 2020
- **Offline stores vital for consumer experience**
  - Figure 7: Experience marketing, September 2020
- **Smartphone manufacturers lead in ecosystem**
  - Figure 8: Brand association, September 2020
- **Consumers expect more towards smart home**
  - Figure 9: Attitudes towards smart home, September 2020
  - Figure 10: Attitudes towards smart home, September 2020
- **What we think**

### ISSUES AND INSIGHTS

- **Green energy, smarter sustainability, smarter home**
- **The facts**
- **The implications**
- **Cross-category collaborations**
- **The facts**
- **The implications**

### 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.

### Buy this report now

Visit [store.mintel.com](https://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

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

- Smarter home for the ageing society
- The facts
- The implications

### THE MARKET – WHAT YOU NEED TO KNOW

- IoT drives opportunities for smart home
- Many players but no leader yet
- Subsectors instead of single entity

### MARKET SIZE AND FORECAST

- Slowed growth rate due to COVID-19 and a lack of industry standard

Figure 11: Estimated retail sales volume for smart home China, 2016-20

### MARKET FACTORS

- Increasing mobile internet users drive smart device adoption
- Voice controlling gets mature
- Adoption intention differs by region
- IoT attracts more internet giants into competition
- Ecosystem and 5G upside

### MARKET SEGMENTATION

- Smart home platform and ecosystem have yet to resonate with consumers

Figure 12: China's smart home market retail unit sales share, by product category, 2016-20

### KEY PLAYERS – WHAT YOU NEED TO KNOW

- Apple chasing smart home customers through AI assistants
- Xiaomi popularises smart home through IoT devices
- Traditional manufacturers riding on brand awareness
- Telecommunication and cable providers

### COMPETITIVE STRATEGIES

- Voice assistants and virtual assistants to connect cross-platform compatibility
- Measuring and tracking health data
- Real estate developer's strategic alliance

### WHO'S INNOVATING?

- Health will be at the heart of the new smart home

Figure 13: Amazfit HomeStudio from Huami, January 2020

### 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.

### Buy this report now

Visit [store.mintel.com](https://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

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

- **Samsung introduces conceptual devices for assisted living**  
Figure 14: Yellow spherical Ballie robot from Samsung, July 2020
- **Numi 2.0 intelligent toilet from KOHLER Kconnect**  
Figure 15: KOHLER Numi 2.0 smart toilet, January 2019
- **UWB technology introduced by Xiaomi**  
Figure 16: Xiaomi's UWB technology, October 2020
- **Haier unveils world's first smart laundry room**  
Figure 17: Haier's smart laundry room at AWE 2019

**THE CONSUMER – WHAT YOU NEED TO KNOW**

- **Consumers access entertainment via smart home**
- **Raising awareness of greener energy**
- **Consumers have just as much power as brands when it comes to future design of smart home**

**OWNERSHIP AND INTEREST IN BUYING**

- **Promising growth by lifestyle pursuit**  
Figure 18: Ownership and interest in buying smart home products, September 2020
- **Rising ownership of smart home appliances**  
Figure 19: Ownership of smart home products, August 2018 vs September 2020
- **Family with child(ren) more engaged**  
Figure 20: Ownership of smart home products, by living situations, September 2020
- **Purchasing interest exists in all city tiers**  
Figure 21: Interest in purchasing smart home products, by city tier, September 2020
- **Lower the entry level to improve penetration**  
Figure 22: Ownership of smart home products, by monthly household income, September 2020

**PURCHASE MOTIVATION**

- **Associating smart homes with quality of life**  
Figure 23: Purchase motivation for smart home, September 2020
- **Post-80s seek more fun from smart home**  
Figure 24: Purchase motivation for smart home towards having more fun in life, by age, September 2020
- **Tier one and tier two consumers show more environmental concerns**  
Figure 25: Purchase motivation for smart home towards energy saving, by city tier, September 2020

**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.

**Buy this report now**

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

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

- **Attention towards practicality increases with age**

Figure 26: Purchase motivation for smart home, practical smart function, futuristic design, by age, September 2020

**CONTROL PREFERENCES**

- **More than half prefer biometric technology in controlling smart home**

Figure 27: Control preference for smart home devices, September 2020

- **Consumers have yet to develop a control preference understanding**

Figure 28: Control preference for smart home devices, by currently owned, September 2020

- **Highlight design to product's remote control**

Figure 29: Control preferences, by consumer purchase motivations, September 2020

- **Brands can pay more attention on how to enhance user experiences for the post-70s**

Figure 30: Control preferences, no preference to control settings, by generation, September 2020

**CONSUMER TOUCHPOINTS**

- **Offline stores are primarily where consumers experience smart home**

Figure 31: Types of touchpoints for smart home, September 2020

- **Approach younger white collars in commercialised zone**

Figure 32: Having experience of smart home in office building and restaurants, by age, September 2020

- **Premium hotel smart home most noticed by young consumers**

Figure 33: Having experience of smart home in premium hotels, by age, September 2020

- **Generate family-based scenarios in offline retail experience**

Figure 34: Having experience of smart home in premium hotels and offline stores, by monthly household income and living situation, September 2020

**BRAND INFLUENCE**

- **Ecosystem vital in smart home**

Figure 35: Brand association when mentioned about smart home, September 2020

- **Xiaomi most recognised by young consumers**

**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.

**Buy this report now**

Visit [store.mintel.com](https://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

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

Figure 36: Associating Xiaomi when mentioned about smart home, by age, September 2020

- **Even levels of playing field**

Figure 37: Brand association when mentioned about smart home, by owners of product types, September 2020

### ATTITUDES TOWARDS SMART HOME

- **Conflict in consumers' attitudes towards smart home**

Figure 38: Attitudes towards smart home, the current smart home devices can or cannot meet consumer needs, September 2020

Figure 39: Attitudes towards smart home, the current smart home devices cannot meet consumer needs, by gender, city tier and age, September 2020

- **Consumers hold a lot of autonomy in how their version of smart home will look**

Figure 40: Attitudes towards smart home, installations before or after house, September 2020

Figure 41: Attitudes towards smart home, installations before or after house, by marital status, September 2020

- **Higher-income consumers are less willing to bother with on and off button**

Figure 42: Attitudes towards smart home, smart home device design, by household income, September 2020

- **Females show interest in design**

Figure 43: Attitudes towards smart home, smart home device external design, by gender, September 2020

### MEET THE MINTROPOLITANS

- **Mintropolitans want more than just fun and value**

Figure 44: Purchase motivation, by consumer classification, September 2020

- **Proving more options for Mintropolitans that fit their lifestyle**

Figure 45: Attitudes towards smart home, by consumer classification, September 2020

### APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **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.

### Buy this report now

Visit [store.mintel.com](https://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](https://www.mintel.com)**.