

Connecting with Smart Home Adopters:

2024 US Trend Report



Adoption of Smart Home technology has surged among Americans in the last four years.

As Americans introduce smart tech into their lives and living spaces, the ability to integrate technology with daily routines has increasingly high appeal.

Alongside the initial adoption of voice-controlled speakers, American consumers are now embracing smart home technology for two main reasons: to provide advanced security features and to efficiently manage their homes' appliances from a distance.

But a question looms: is my data safe?

Drawing on **YouGov Profiles** data, this report steps into the American Smart Home, uncovering the evolving landscape and exploring what the future might hold. It identifies the devices being embraced and shines a spotlight on the adopters: who they are and how brands can connect with them.



Deepening awareness

One in three Americans are now fully aware of smart home devices. Over the last four years, general knowledge about connected technology has deepened.

Smart Home Appliance Awareness

- I am aware of smart home appliances, but don't know much about them
- I am fully aware of smart home appliances and know a lot about them
- I am not aware at all of smart home appliances
- Don't know



YouGov Profiles+ USA Datasets accessed: November 15, 2020; November 14, 2021; November 13, 2022; November 12, 2023. (N>33,000). Smart home appliances include smart home devices and appliances such as smart security cameras, sensors, or alarms, smart speakers, smart thermostats, smart washing/dryer, smart fridge/freezer etc.

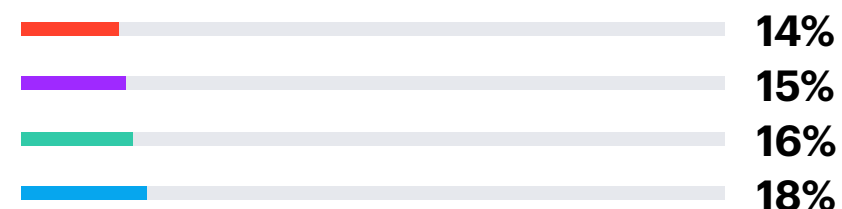
Rapid adoption of smart home devices driven by security

Smart Home Technology Ownership

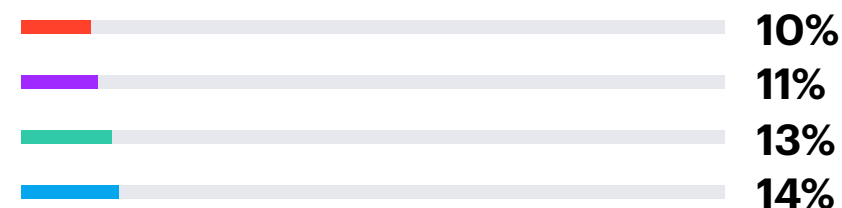
Smart home security
cameras, sensors, or alarms



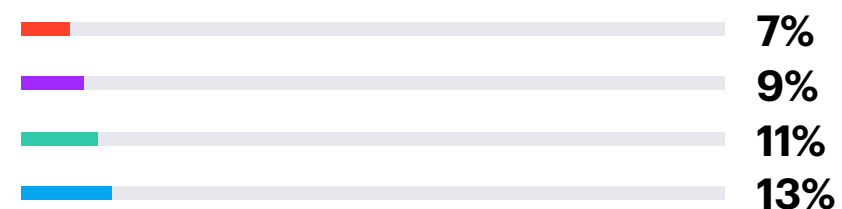
Smart voice-controlled speaker



Smart home thermostat
(i.e., to control temperature)



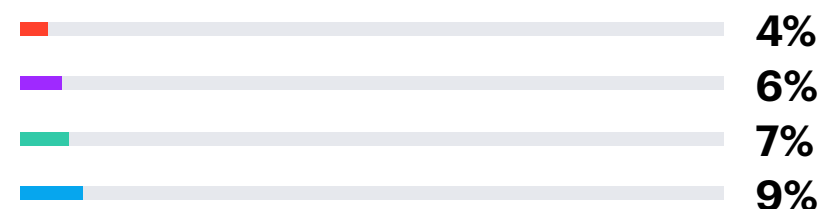
Smart light system



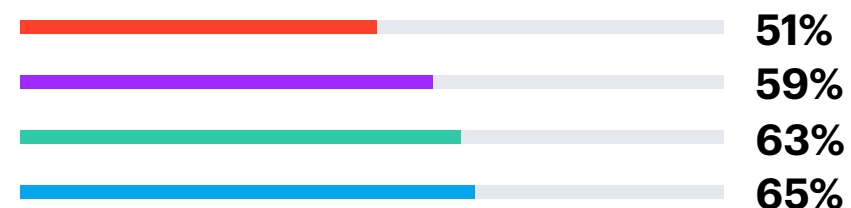
Smart washing
machine/ dryer



Smart vacuum cleaner



Own any of
the above



● 2020 ● 2021
● 2022 ● 2023

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65% of Americans now own at least one smart home appliance or device, up from 51% in 2020.

Voice-controlled speakers had the lowest barrier to entry.

Smart home security has seen the most significant increase in adoption over the past 4 years.

YouGov Profiles+ USA Datasets
accessed: November 15, 2020;
November 14, 2021; November 13,
2022; November 12, 2023. (N>33,000)

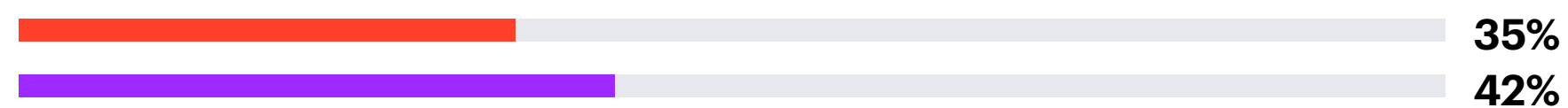


Generational gadget gaps

Smart Home Technology Ownership

● Under 45 ● Over 45

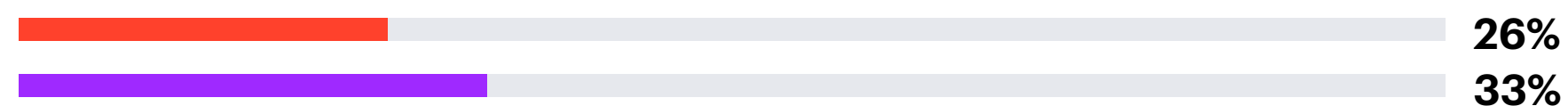
Smart home security cameras, sensors, or alarms



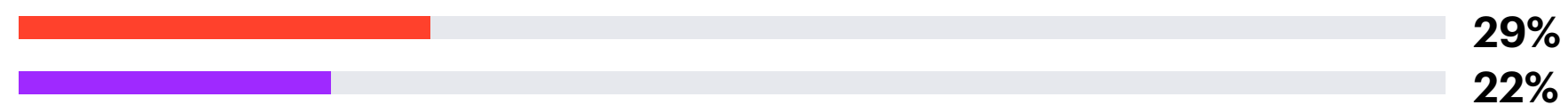
Smart voice-controlled speaker



Smart home thermostat



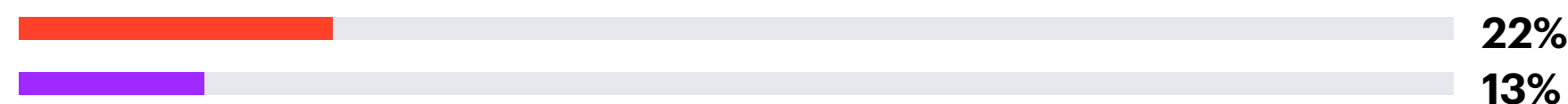
Smart light system



Smart washing machine/dryer



Smart vacuum cleaner



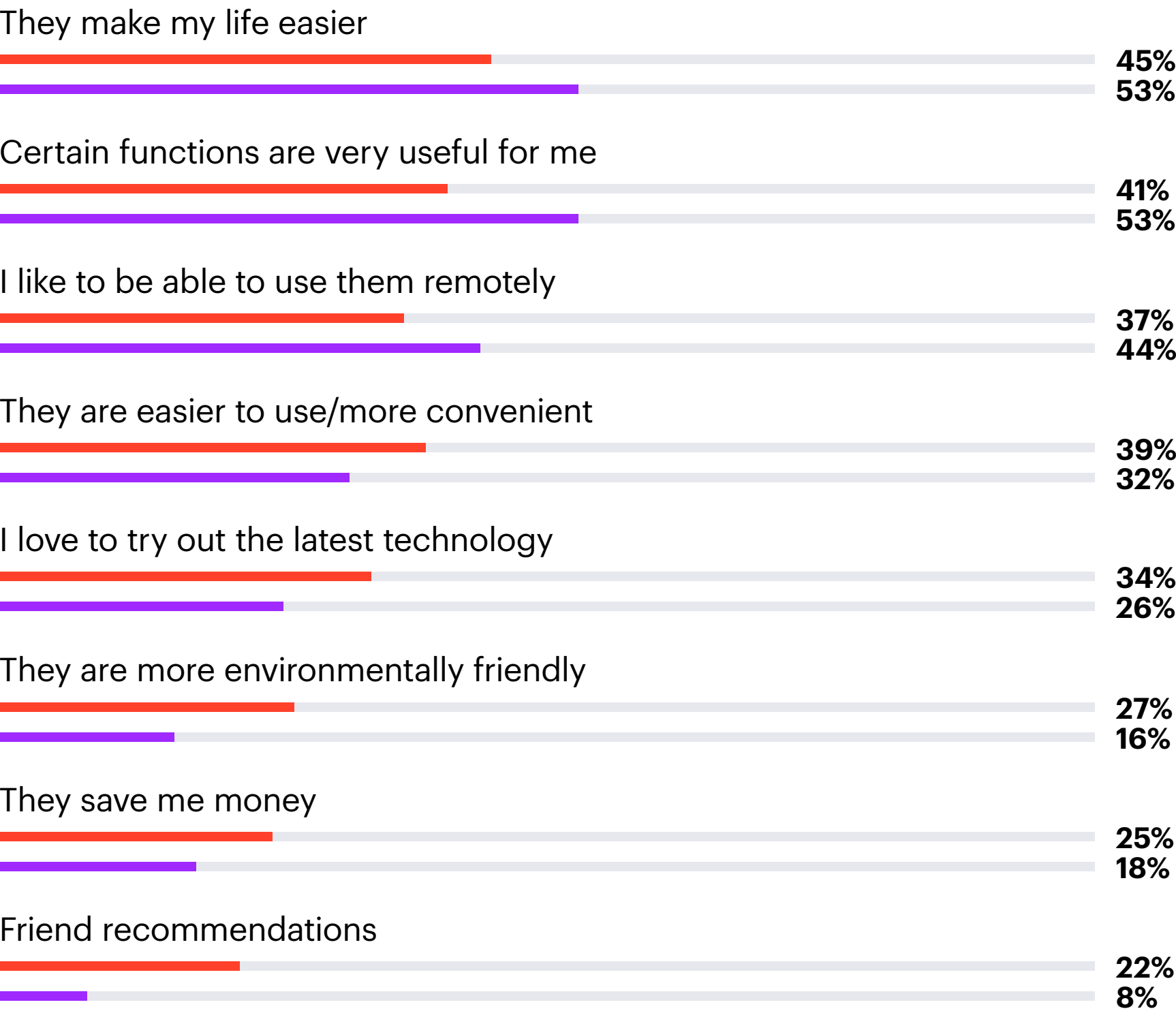
Younger Americans more likely to adopt convenience-focused devices such as washing machine/dryers, cleaners, and lighting.

45+ Americans more likely to choose security systems, speakers, and thermostats to connect and control their living spaces.

YouGov Profiles + USA November 12, 2023 (N> 12,600); Filters used: Own any smart home appliance or device.

Saving time and money

Drivers of Smart Home Technology



- Under 45
- Over 45

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Convenience and ease of use are key factors for over 45s in choosing smart home devices.

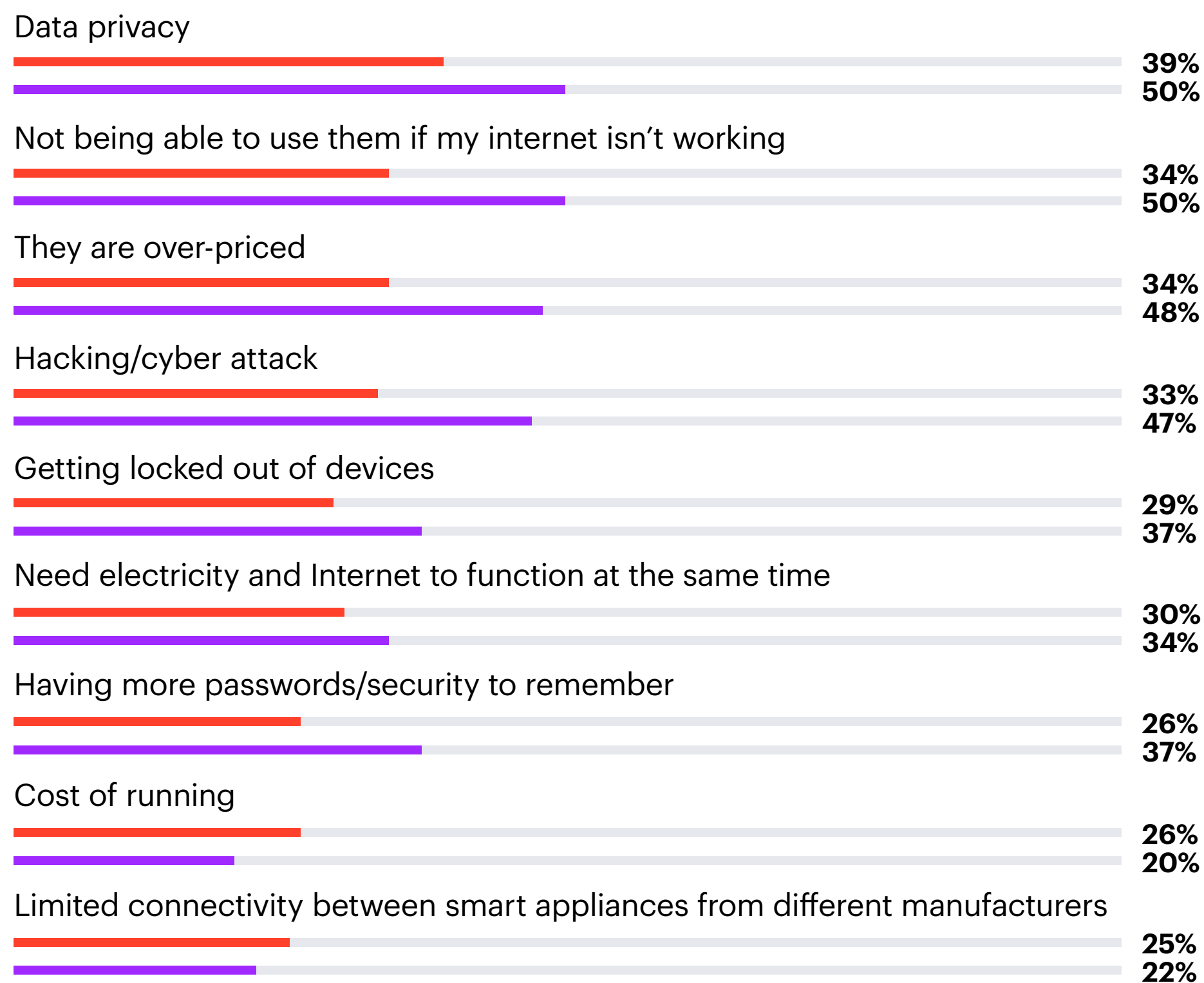
Younger generations are also moved by trying new tech, sustainability and friends’ recommendations.

YouGov Profiles + USA November 12, 2023 (N> 2,900); Filters used: Own any smart home appliance or device. Excluded respondents selecting Don't Know, None, and Not Applicable.



The data privacy conundrum

Barriers to adopting Smart Home Technology



● Under 45

● Over 45

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Data privacy, cyber-attacks and purchase price concern all Americans.

Over 45s are more deterred by having to remember more passwords and/or getting locked out.

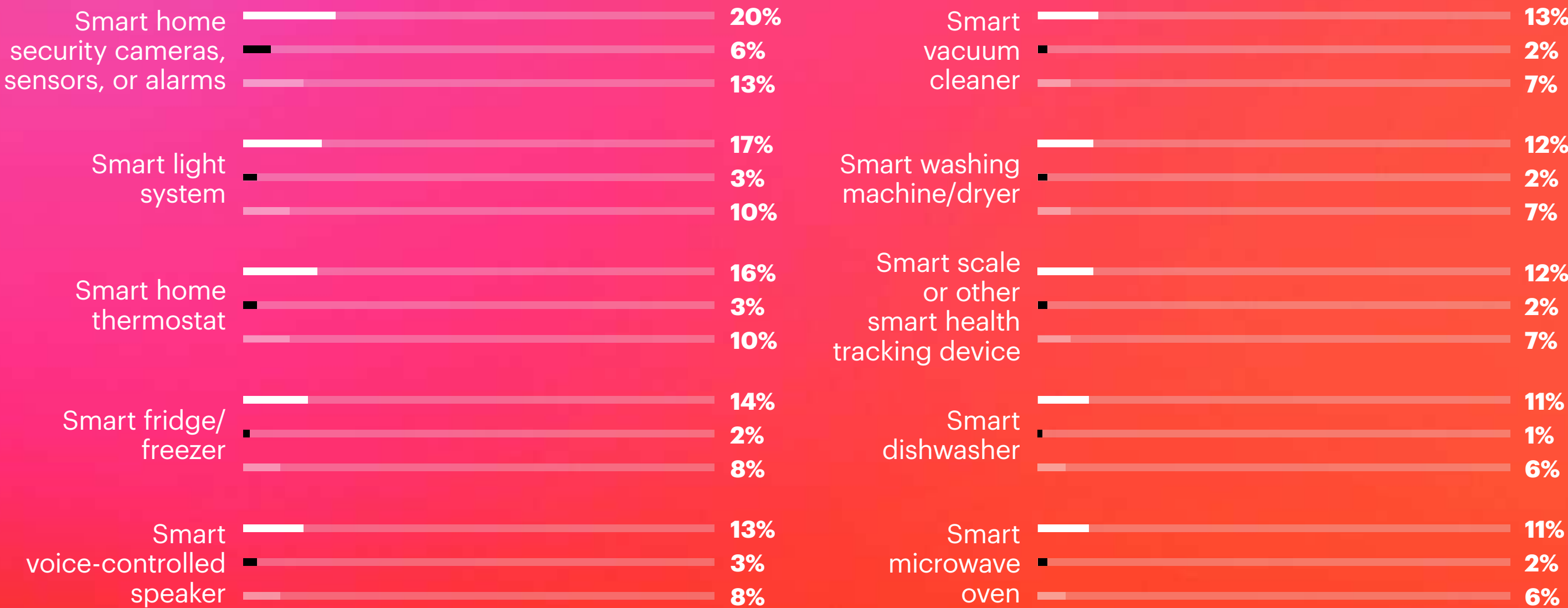
YouGov Profiles + USA November 12, 2023 (N> 2,900); Filters used: Own any smart home appliance or device. Excluded respondents selecting Don't Know, None, and Not Applicable.

Once you go Smart, you never depart

Data shows that adoption of smart home devices is the best indicator of future purchase intention.

Smart Home Technology Consideration

● Smart Home Technology Owners ● Do not own Smart Home Technology ● Gen Pop



YouGov Profiles + USA November 12, 2023 (N> 8,100); Smart home appliance owners have at least one of the smart home appliances or devices. Smart home appliances include smart home devices and appliances such as smart security cameras, sensors, or alarms, smart speakers, smart thermostats, smart washing/dryer, smart fridge/freezer etc.

1 in 3 Americans are now considering purchasing smart home technology, up 68% since 2020

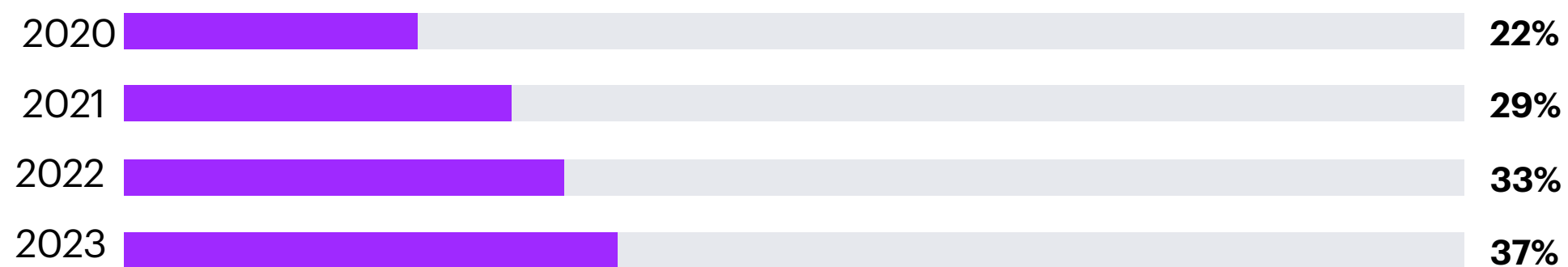
As growth in ownership of smart home technology increases, we also see a rise in future consideration.

Smart Home Technology Consideration

Smart Home Technology Owners



Gen Pop

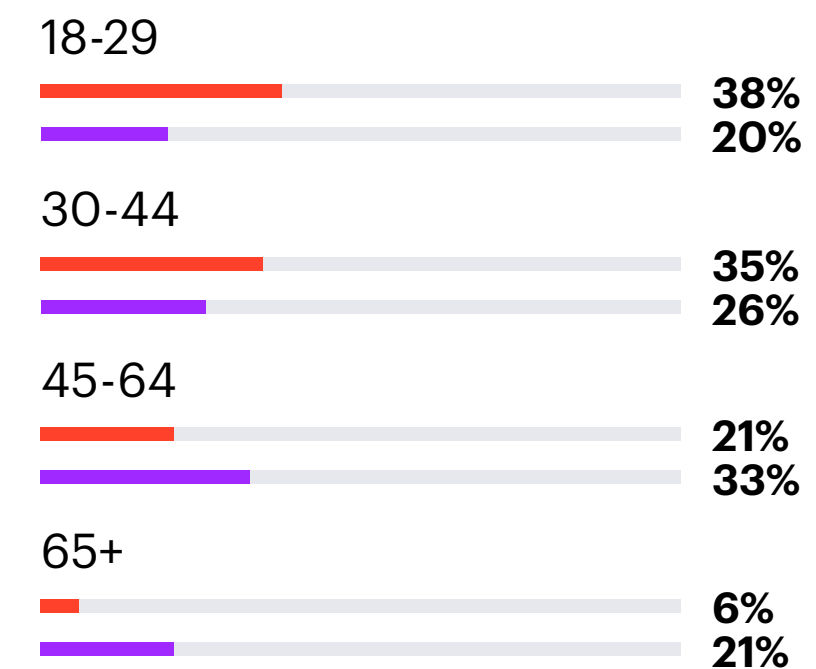
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How do future purchasers compare to the general population?

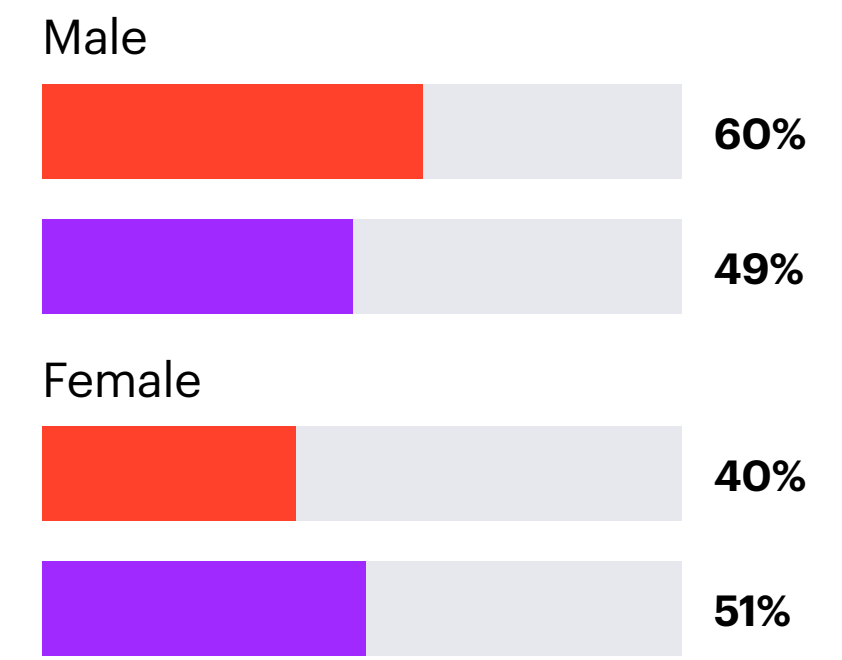
Considerers are more likely to be young lads and dads.

● Smart home technology considerers ● Gen Pop

Age

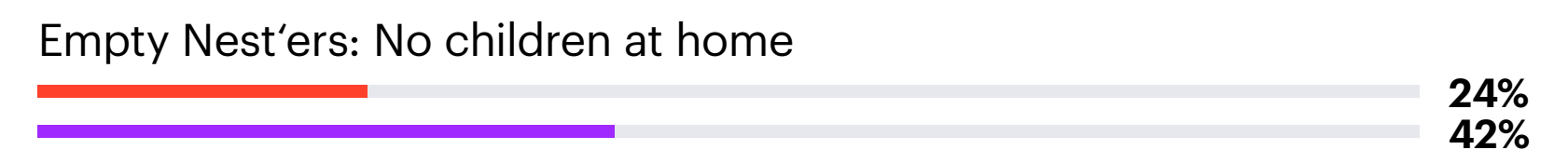
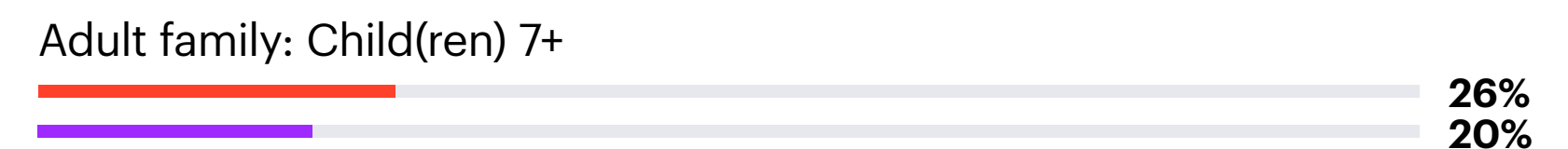
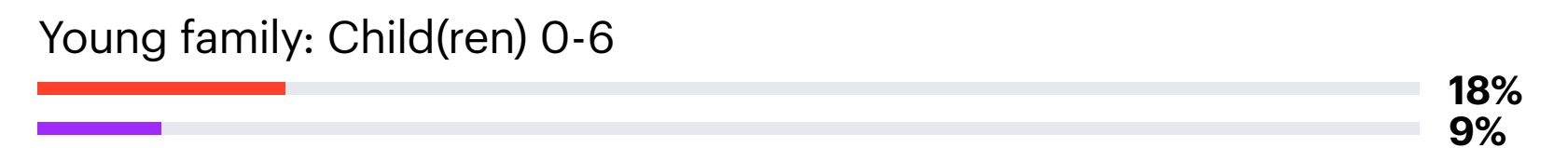
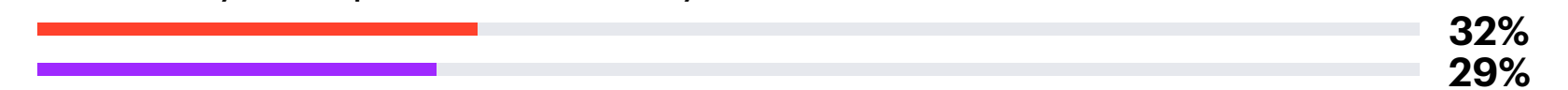


Gender



Life cycle

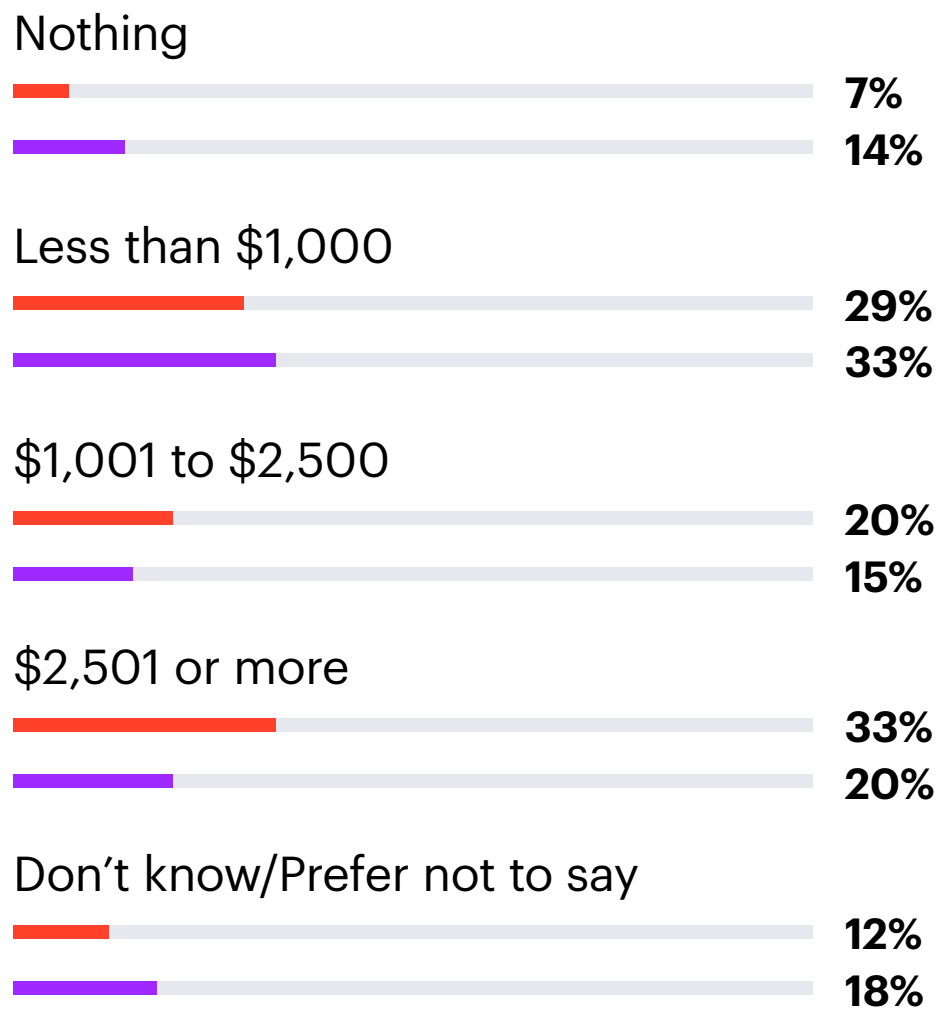
Pre family: The person is 15-45 years old without children



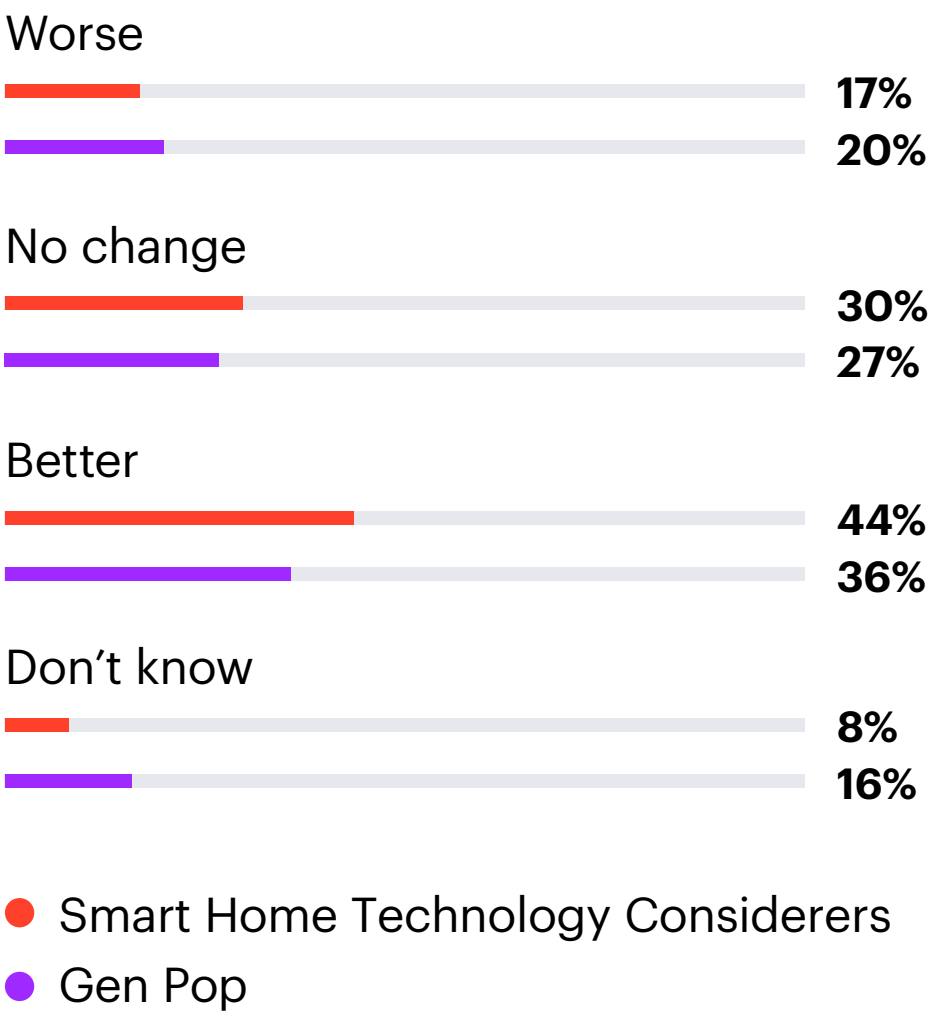
YouGov Profiles + USA November 12, 2023 (N> 4,700); Filters used: Considering any smart home appliance or device.

Smart Home Technology Considerers have better financial circumstances

Household monthly disposable income



2024 financial outlook



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Future adopters are tech savvy and socially responsible

Attitudes agreed with

● Smart Home Technology Considerers

● Gen Pop

Relying on my smart speaker saves me time

66%

38%

I am willing to pay more for sustainable energy

65%

45%

I try to buy only from companies who are socially and environmentally responsible

63%

42%

I am often among the first of my friends to try new technology products and services

61%

36%

I consider myself an environmentalist

59%

44%

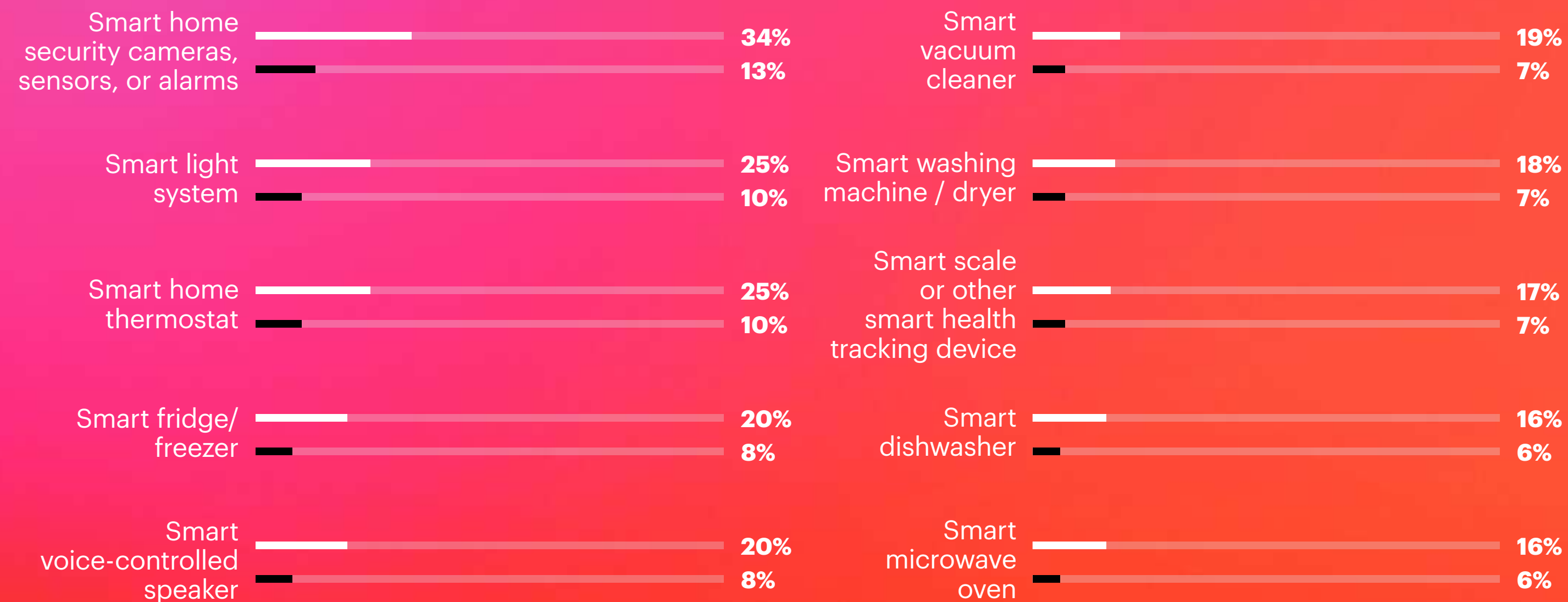
Security continues to lead Smart Home purchase consideration

Among those planning to buy connected home technology in the next 6 months, the most popular devices are security equipment, followed by smart lighting and heating.

Smart Home Technology Consideration

● Smart Home Technology Considerers

● Gen Pop

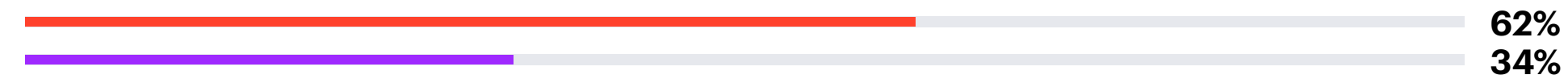


How do you connect with the next generation of Smart Home adopters?

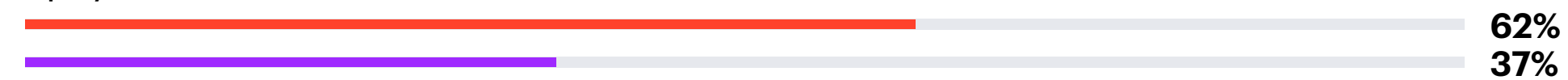
Celebrities and sponsors heavily influence their purchase intention.

Attitudes agreed with ● Smart Home Technology Considerers ● Gen Pop

I enjoy watching advertisements with my favorite celebrities



I pay attention to the ads at events



If you sponsor my team, I will buy your products

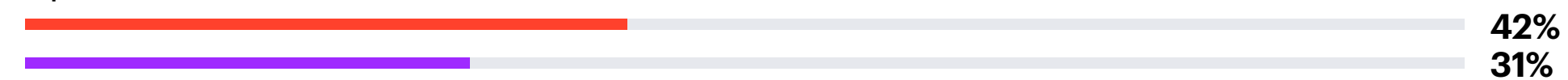


I trust products recommended by celebrities or influencers

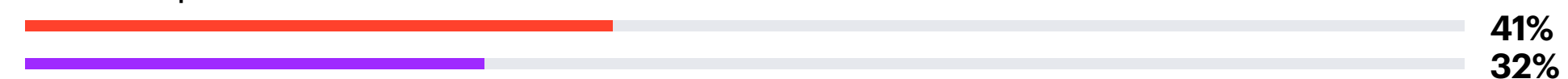


Sponsorships Noticed

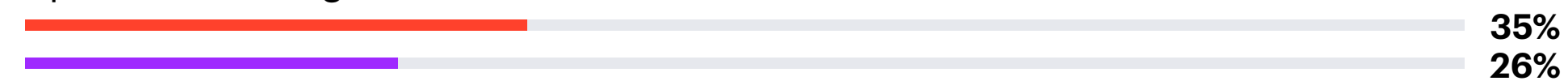
Sponsor of an event



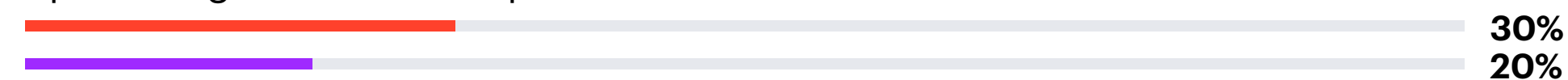
Product placement



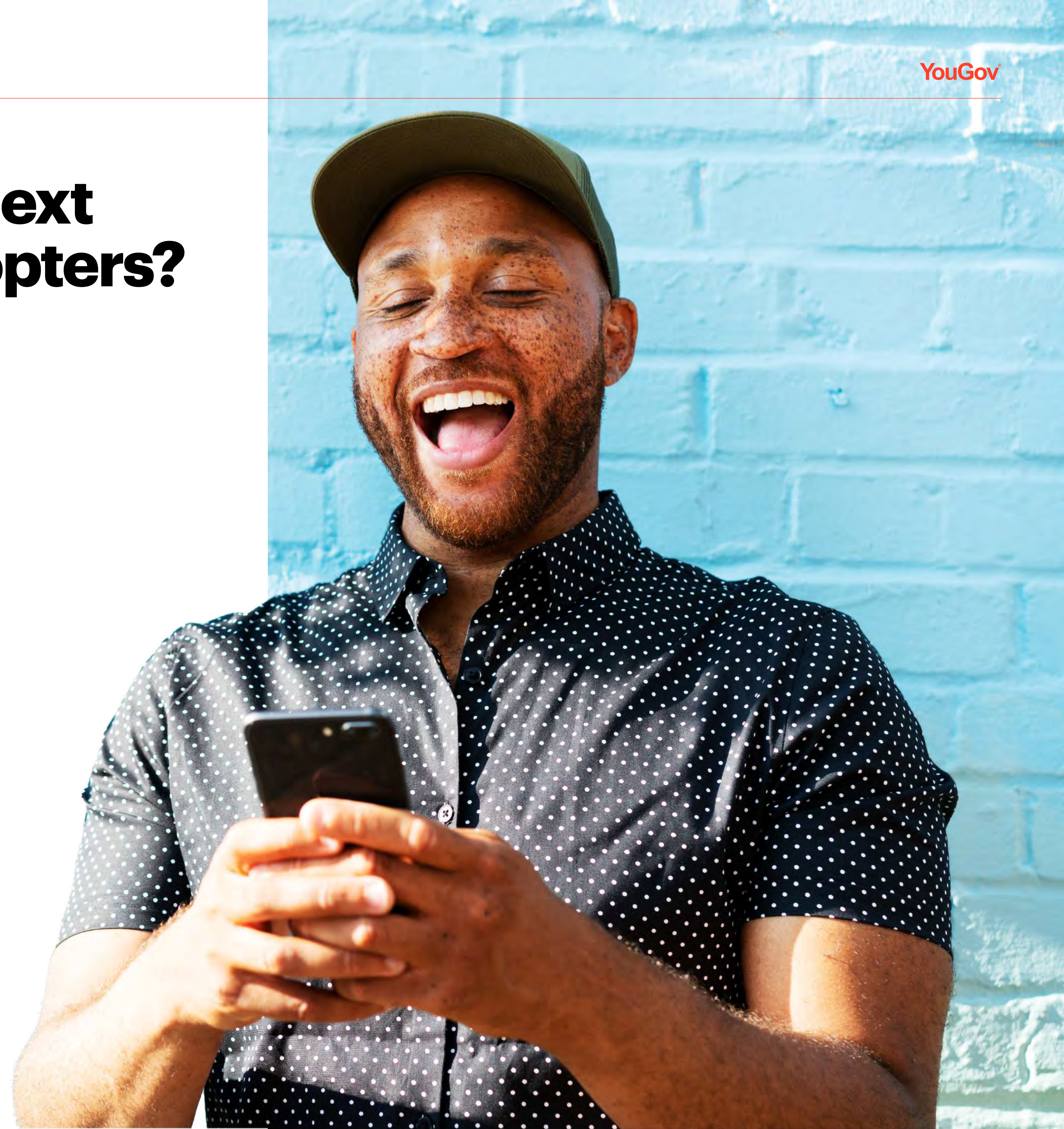
Sponsor of user-generated content



Sponsoring a social media post



Sponsor of a TV program

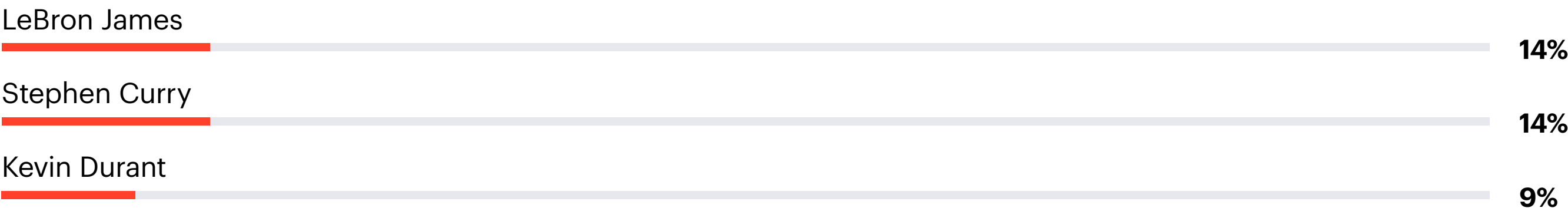




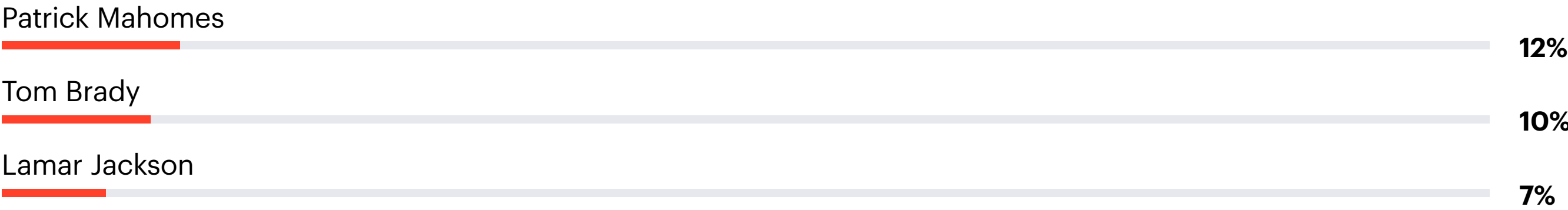
Which athletes will best engage Smart Home Adopters?

NBA, NFL, and MLB fans

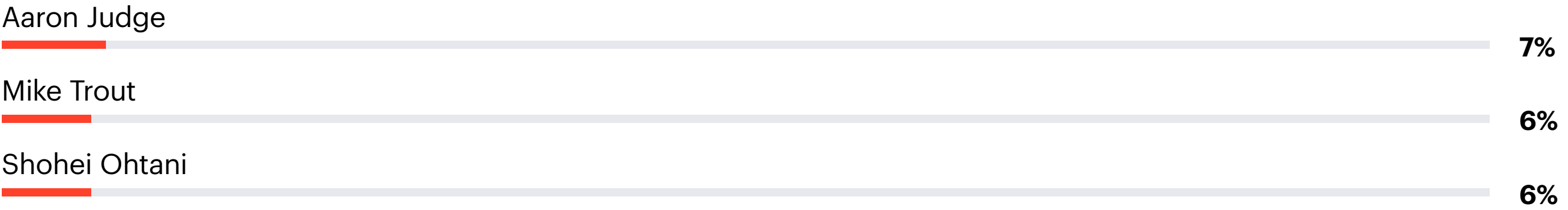
NBA



NFL



MLB



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YouGov Profiles + USA November 12, 2023 (N> 2,000); Filters used: Considering any smart home appliance or device.

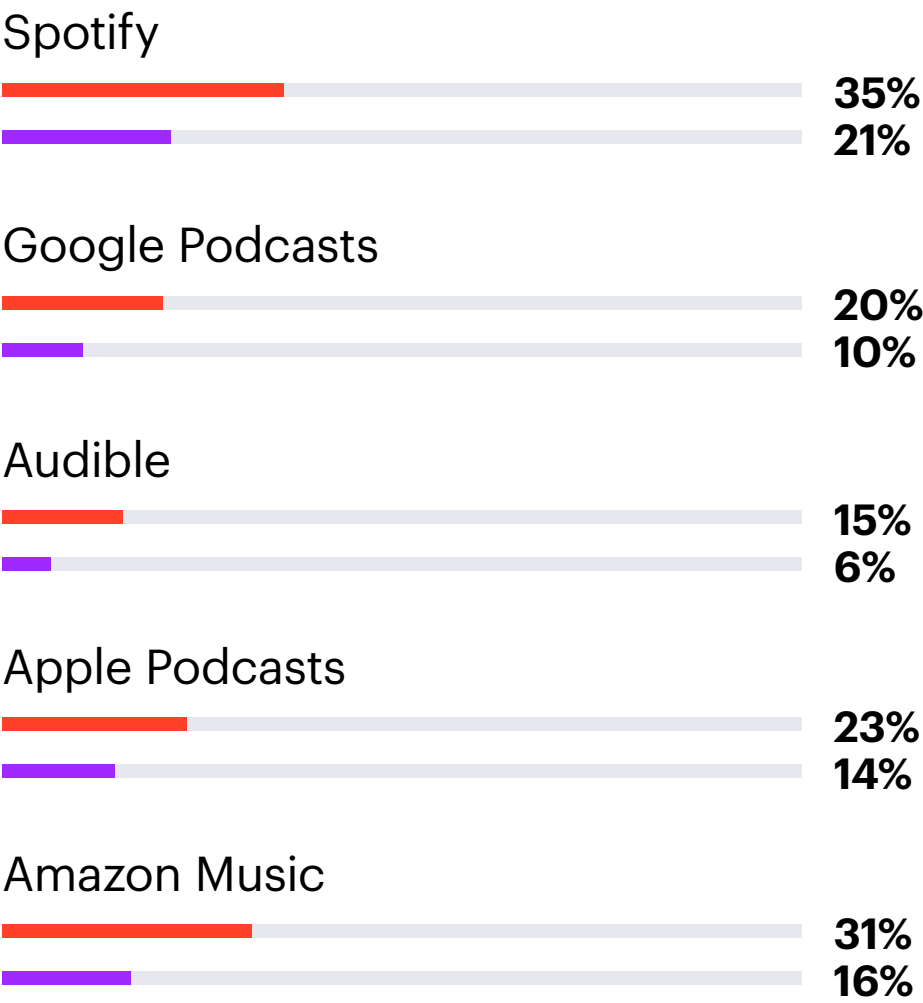
Always listening

Smart Home Considerers listen to more podcasts and spend more time streaming music, notably more likely to listen to podcasts via Spotify, but music via Amazon

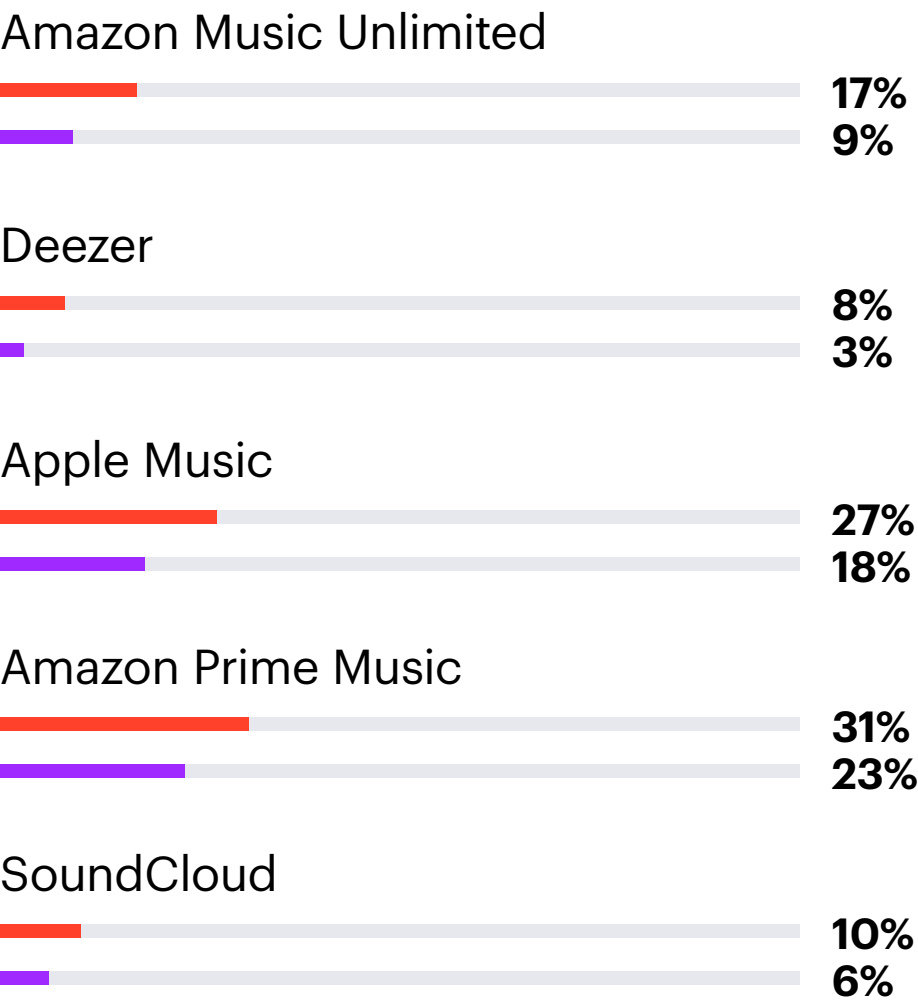
41% of Smart Home Tech Considerers spend more than 6 hours a week listening to podcasts (vs **21%** gen pop).

53% of Smart Home Tech Considerers spend more than 6 hours a week streaming music (vs **35%** gen pop).

Where they listen to podcasts



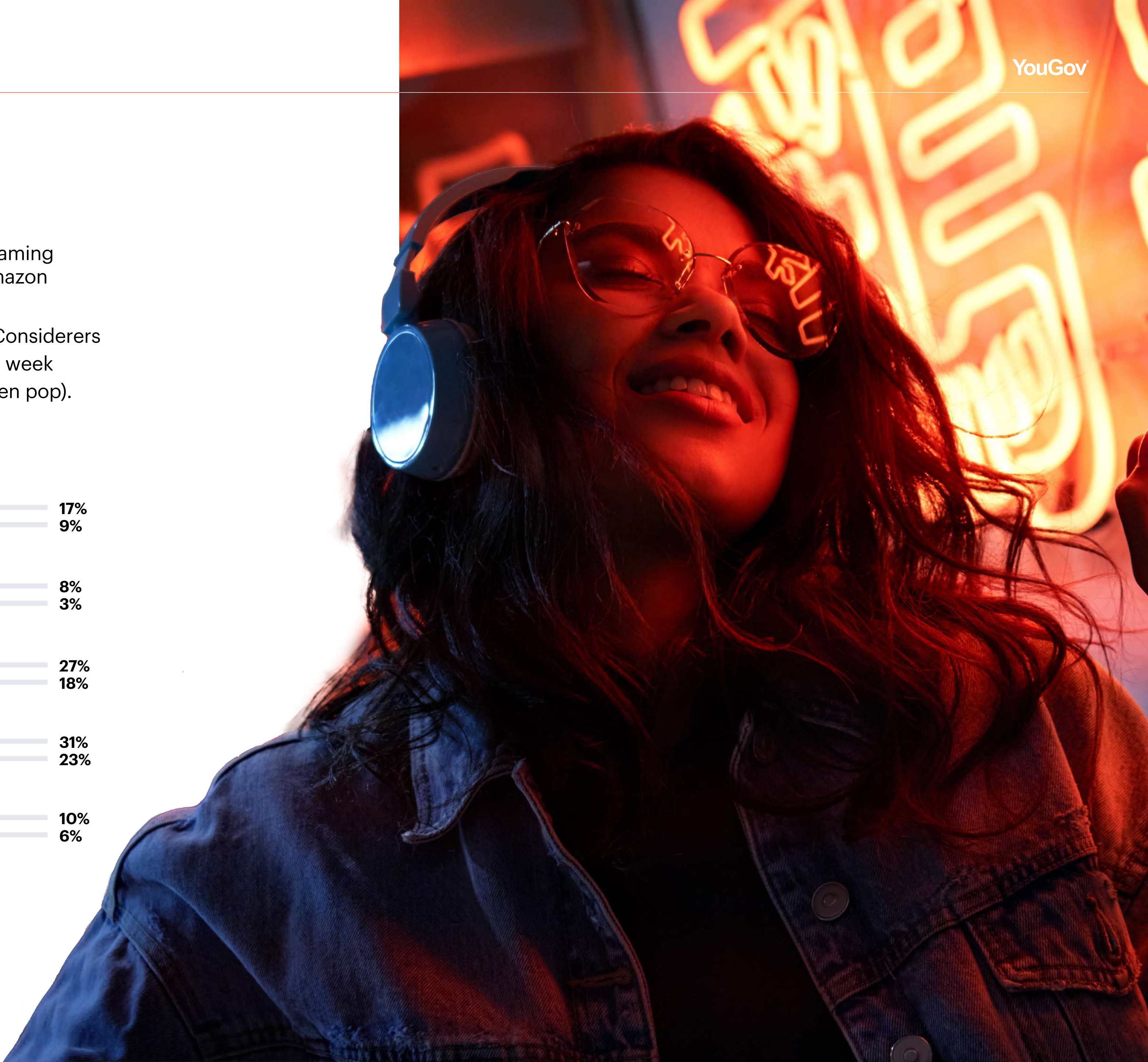
Where they stream music



- Smart Home Technology Considerers
- Gen Pop

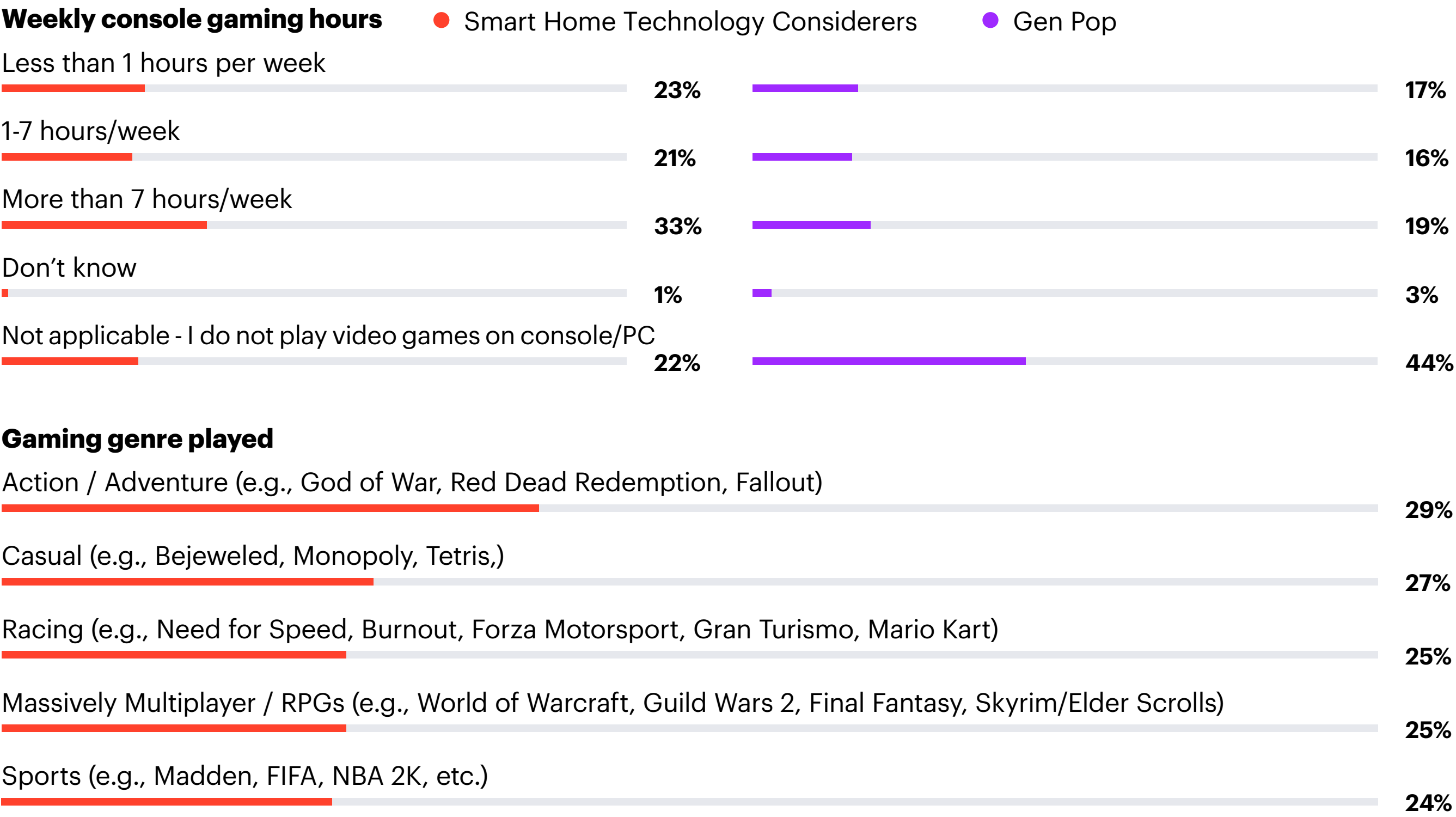
[Request genre data >](#)

YouGov Profiles + USA November 12, 2023 (N> 2,000); Filters used: Considering any smart home appliance or device. Platforms ordered by likelihood to use compared to gen pop, not overall usage.





Gaming is at the heart of their leisure time



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YouGov Profiles + USA November 12, 2023 (N> 3,350); Filters used: Considering any smart home appliance or device.

Which brands are future Smart Home adopters considering?

Smart Speaker Brands

Amazon (e.g., Echo, Screen, etc.)



Google Home, Mini etc.



Apple HomePod



Sonos One

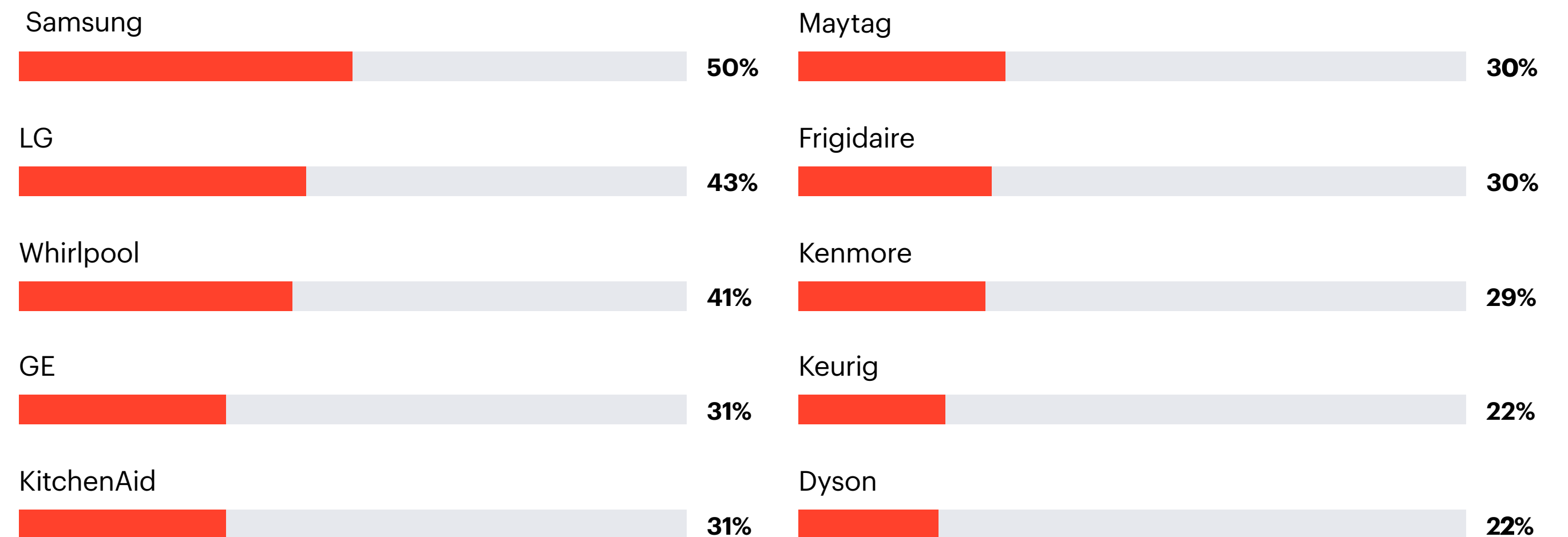


YouGov Profiles + USA November 12, 2023 (N> 6,200); Considering purchasing within next 6 months; Excluded Don't Know respondents.



Samsung, LG, and Whirlpool, top the chart for domestic appliance brands

Domestic Appliances Brands considered by Smart Home Technology Considerers

[Explore more data >](#)[Run a survey >](#)

YouGov BrandIndex: November 1, 2022 – October 31, 2023, US, Smart Technology Considerers (N>600); Brands are ranked based on consideration scores (% Yes)

Want a deeper analysis?

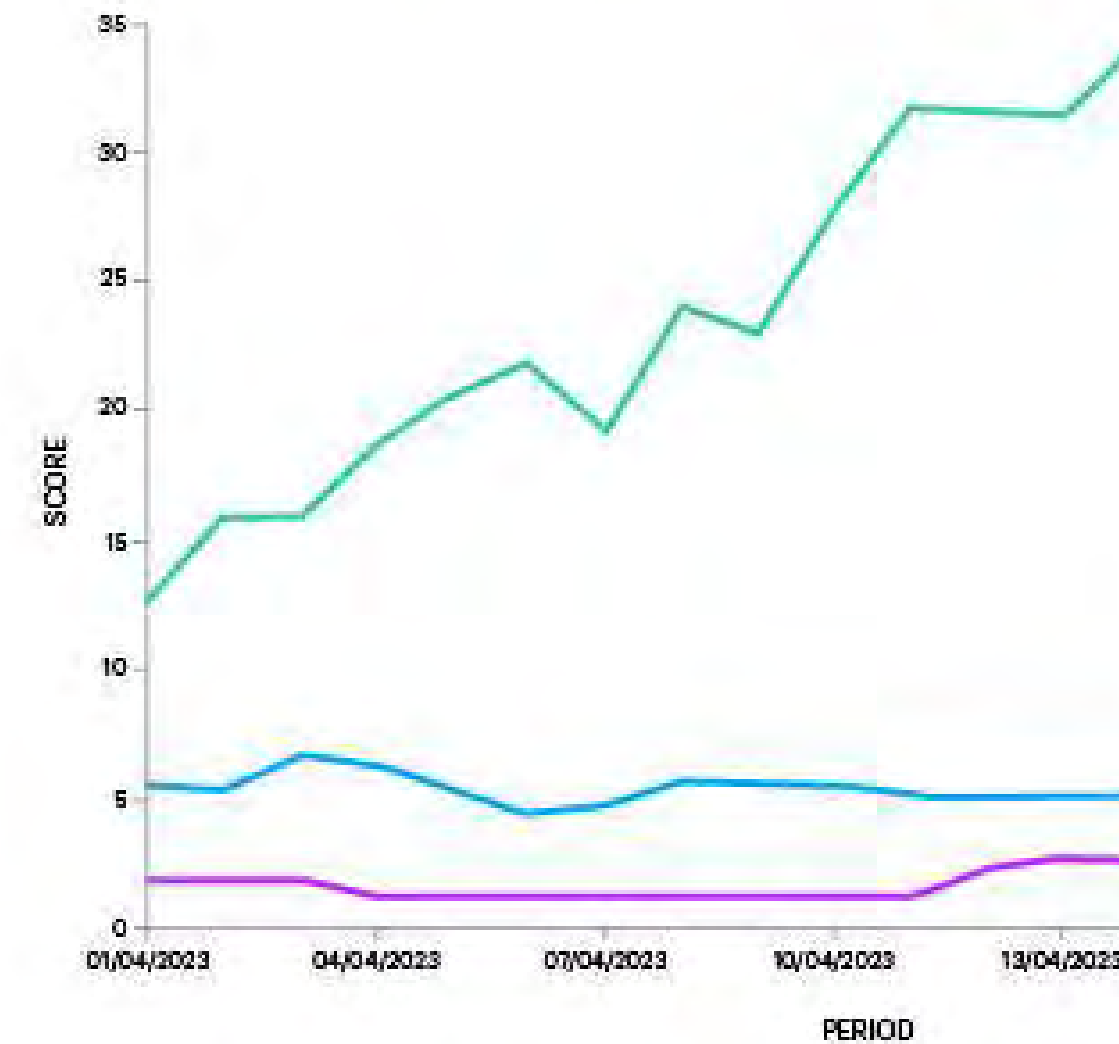
YouGov BrandIndex tracks 2,000+ brands on 16 key brand health metrics including:

- Ad Awareness
- Customer Satisfaction
- Perceived Value
- Recommendation

With YouGov Profiles, you can segment your analysis by:

- Gaming interest
- Device ownership
- Hobbies & interests
- Social media membership
- And much more

Advertising awareness



Metrics ▾

Advertising Awareness



Thank you!

Get in touch to access full data in your category, including up to 15 other brand health metrics, additional demographic segmentation, and much more granular psychographic preferences of your target audience.

YouGov BrandIndex and YouGov Profiles allow you to research brands and audiences with virtually unlimited granularity, delivering in-depth media insights to plan marketing strategies that maximize ROI.

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