

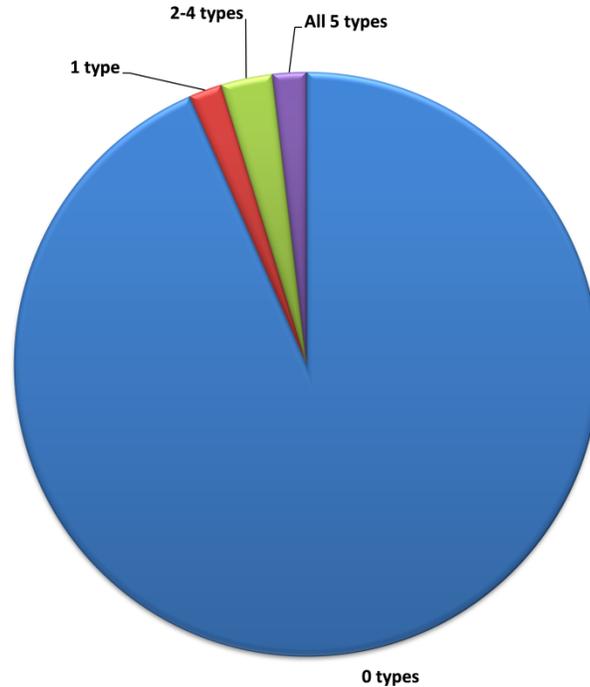
By **Tom Kerber**, *Director of Home Systems and Energy*, **John Barrett**, *Director, Consumer Analytics*, **Yilan Jiang**, *Manager of Consumer Research*, and **David Mitchel**, *Research Analyst, Parks Associates*

**SYNOPSIS**

*Home Energy Management Adopters* profiles the early adopters of smart home, energy management devices including thermostats, lighting, power strips, outlets, and appliances. It quantifies the current market and identifies the leading product categories and brands. It analyzes adoption patterns to identify the key characteristics of those adopting energy management devices. It also analyzes current demand for energy management products and investigates of the key drivers motivating consumers to adopt.

**Number of HEM Product Types Acquired in 2013**

(U.S. Broadband Households)



© Parks Associates

**ANALYST INSIGHT**

“The adoption of energy management products is not so much about energy efficiency as it is about increasing comfort and convenience for the consumer. It also appears closely tied to the “nesting” stage of life when people settle down and begin families.”

— **John Barrett**, *Director, Consumer Analytics, Parks Associates*

**CONTENTS**

**Home Energy Management Adopters**

**About the Research**

**Previous Research**

- Expanding Residential Demand Response Adoption (Q1/14)
- Leveraging Partnerships to Deliver Home Energy Management (Q1/14)

## CONTENTS

- Energy & American Broadband Households (Q4/13)
- Leveraging the Cloud for Home Energy Management (Q4/13)
- Consumer Segmentation: Who Will Pay for Home Energy Management (Q3/13)

**Key Findings****Recommendations****HEM Device Adoption**

- Number of HEM Product Types Owned (Q1/14)
- Adoption of Smart Home Devices (Q1/14)
- Smart Home Controls as Part of System or Stand-alone Devices (Q1/14)
- Smart Home Equipment: Top Five Brands Purchased
- Smart Lights (Q1/14)
- Control Mechanism for Smart Lights (Q1/14)
- Number of HEM Product Types Owned by Age (Q1/14)
- Number of HEM Product Types Owned by Income (Q1/14)
- Number of HEM Product Types Owned by Education (Q1/14)
- Number of HEM Product Types Owned by Annual Home Improvement Spending (Q1/14)
- Number of HEM Product Types Owned by Children at Home (Q1/14)
- Number of HEM Product Types Owned by Square Footage (Q1/14)
- Number of HEM Product Types Owned by Time in Current Residence (Q1/14)
- Number of HEM Product Types Owned by Likelihood of Moving in the Next 12 Months (Q1/14)
- Number of HEM Product Types Owned by Urban vs. Rural (Q1/14)

**2013 HEM Device Purchases**

- 2013 Purchase of Smart Home Equipment (Q1/14)
- Average Price of Smart Home Control Device (Q1/14)
- Method of Purchasing Smart Home Control Devices (Q1/14)
- Location to Purchase Smart Home Control Devices (Q1/14)
- Reason to Purchase Smart Home Control Devices (Q1/14)
- Individual HEM Products Acquired in 2013 by Age (Q1/14)
- Individual HEM Products Acquired in 2013 by Household Income (Q1/14)
- Individual HEM Products Acquired in 2013 by Education (Q1/14)
- Individual HEM Products Acquired in 2013 by Home Improvement Spending (Q1/14)

## CONTENTS

- Individual HEM Products Acquired in 2013 by Children at Home (Q1/14)
- Individual HEM Products Acquired in 2013 by Home Size (Q1/14)
- Individual HEM Products Acquired in 2013 by Time in Current Residence (Q1/14)
- Individual HEM Products Acquired in 2013 by Likelihood of Moving in the Next 12 Months (Q1/14)
- Intention to Buy Smart Home Control Device (Q1/14)
- Intended System for Smart Home Equipment (Q1/14)

**HEM Adoption Drivers**

- Attitudes Towards Energy & Technology (Q1/14)
- Attitudes Towards Home & Environment (Q1/14)
- Number of HEM Product Types Acquired in 2013 by Attitudes (Q1/14)
- Number of HEM Product Types Owned by Impressive Lifestyle (Q1/14)
- Number of HEM Devices Owned and Impressive Lifestyle (Q1/14)
- Adoption of Individual HEM Products and Impressive Lifestyle (Q1/14)
- Number of HEM Product Types Owned and Environmentalism (Q1/14)
- Number of HEM Devices Owned and Environmentalism (Q1/14)
- Average Total HEM Product Expenditure in 2013 by Motivating Factor (Q1/14)

**Additional Research from Parks Associates**

ATTRIBUTES

Parks Associates  
15950 N. Dallas Pkwy  
Suite 575  
Dallas TX 75248

TOLL FREE 800.727.5711

PHONE 972.490.1113

FAX 972.490.1133

[parksassociates.com](http://parksassociates.com)

[sales@parksassociates.com](mailto:sales@parksassociates.com)

Authored by Tom Kerber, John Barrett, Yilan Jiang, and David Mitchel  
Executive Editor: Tricia Parks

Number of Slides: 66  
Published by Parks Associates

© 2014 Parks Associates | Dallas, Texas 75248

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

**Disclaimer**

*Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.*