

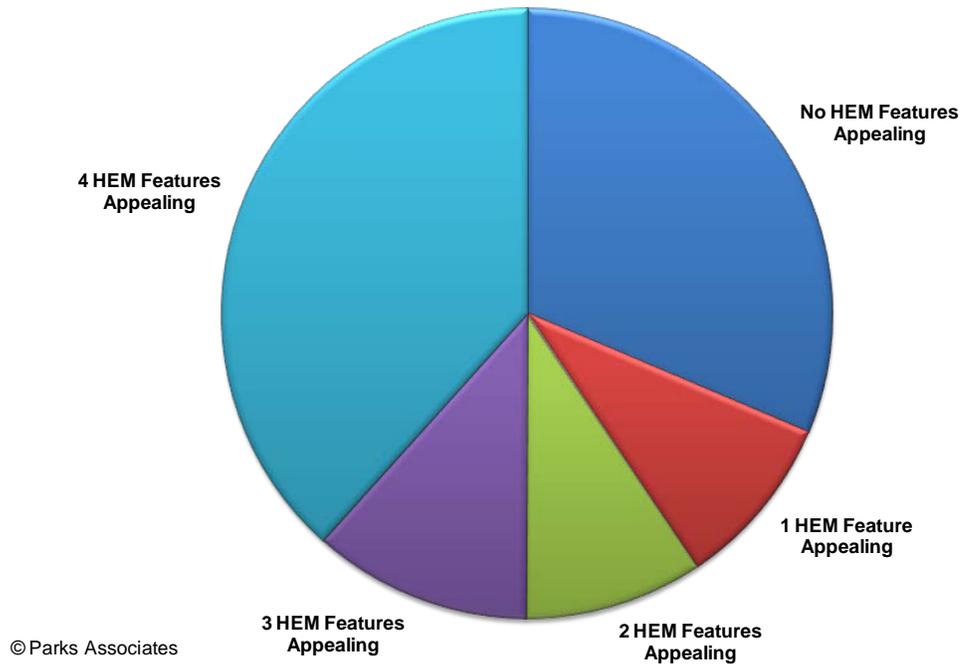
By **John Barrett**, *Director, Consumer Analytics*, and **Yilan Jiang**, *Manager of Consumer Research*, **Parks Associates**

SYNOPSIS

Consumer Segmentation: Who Will Pay for Home Energy Management? gauges current adoption levels for home energy management features and analyzes the consumers who express interest and a willingness to pay for home energy management services.

In particular, the report examines consumer demand within the context of a broad range of smart home services that include security and safety features.

Number of Appealing Home Energy Management Features
(U.S. Broadband Households)



ANALYST INSIGHT

“Energy management features have broad appeal, but consumers want energy management integrated into comprehensive smart home packages. Selling energy management as a standalone service will be harder than riding on the coattails of other services being offered to consumers.”

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

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Previous Research

Key Findings

Recommendations

Market Overview

- Home Security System Adoption (2010-2013)

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- Telecom Service Providers
- Cable Service Providers
- Home Security System Features (Q1/13)
- Likelihood of Upgrading Security System for Remote Monitoring (Q1/13)
- Equipment Upgrades Considered for Security System (Q1/13)
- Intention to Acquire a Home Security System by Home Ownership (2011-2013)
- Ownership of Security or Home Control System (Q2/12)
- Home Control System Features (Q2/12)

Programmable Thermostats

- Programmable Thermostat Ownership (Q2/13)
- 2013 Programmable Thermostat Purchases (Q4/13)
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- Programmable Thermostat Purchase Location (Q4/13)

The Demand for Home Energy Management

- All respondents were presented with a list of home management features.
- Most Appealing Home Management Features (Q4/12)
- Appeal of Home Management Features – Cont'd (Q4/12)
- Top 5 Important Smart home Features (Q4/12)
- Importance of Smart home Features – Cont'd (Q4/12)
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- # of HEM Features Tanked Among the Top Three (Q4/12)
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Characteristics of Those Desiring HEM

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- Appeal of HEM Features & Bundled Electricity Costs (Q4/12)
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Paying for Home energy Management

- Respondents were presented with two scenarios for acquiring a home management system.
- Service conditions
- Demand for Home Management: Model Comparison (Q4/12)
- Demand for HEM & Willingness to Subscribe to Home Management Services (Q4/12)
- # of Ranked HEM Features & Willingness to Subscribe to Home Management Service (Q4/12)
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- Intention to Purchase Home Monitoring Products (Q4/12)
- Willingness to Buy Home Energy Management Products (Q4/12)
- Willingness to Buy Home Monitoring Products: Energy vs. Non-Energy (Q4/12)

Additional Research from Parks Associates

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