

Research Findings

Interview

Key Characteristics

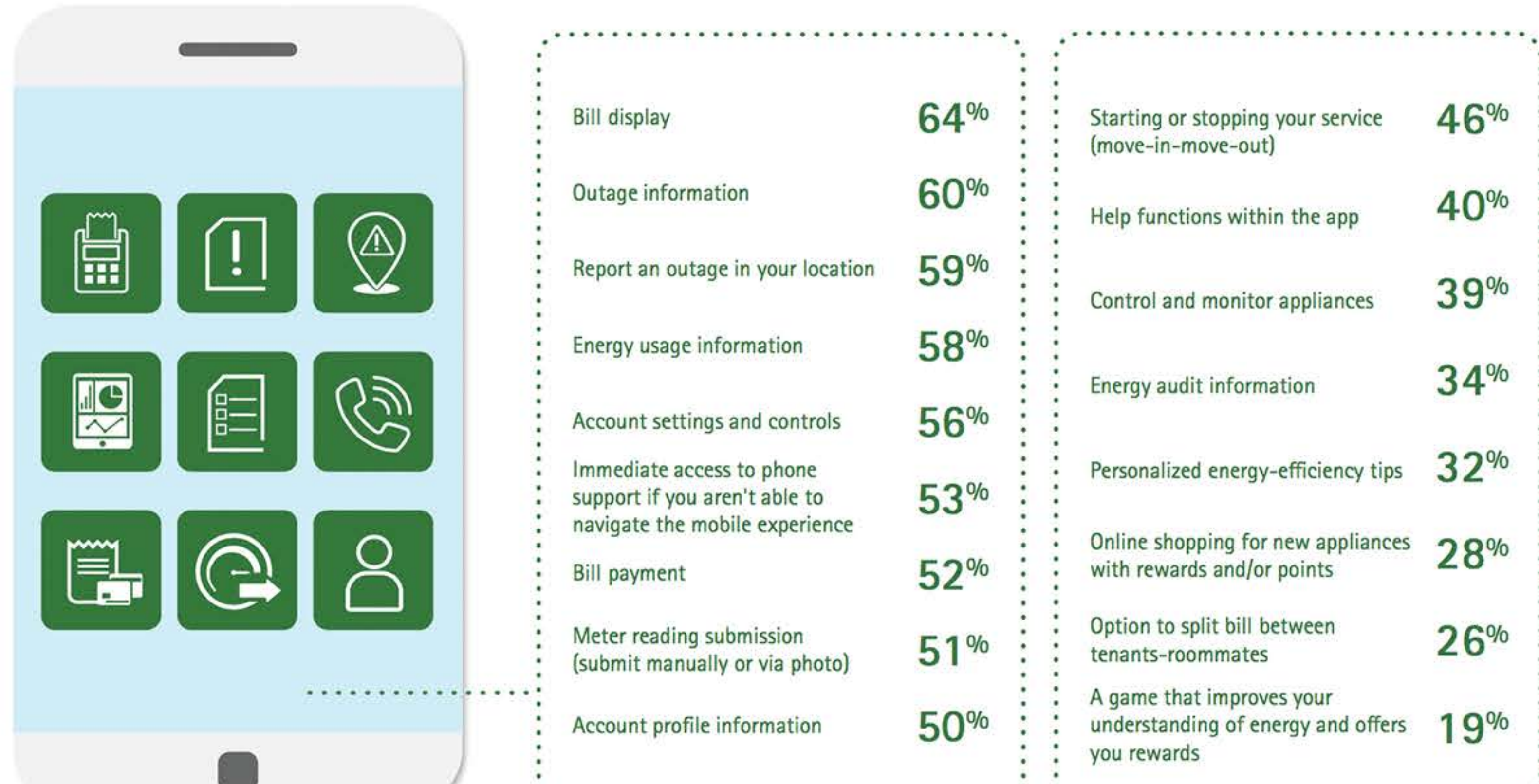
- Working, college educated
- Highest average bill
- Highest income

Distinctive Attitudes and Behaviors

- Attach above average importance to home energy efficiency
- High level of energy efficiency knowledge
- Least likely to believe their utility does what they say or works in the best interest of the consumer
- Prefer comfort, time, and ease over savings
- Average level of interest in pricing options
- High interest in new energy technologies

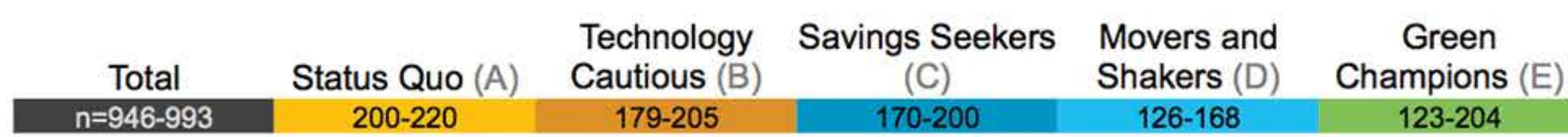
Secondary Research

Which features or functionalities would you expect when considering using a mobile application to interact with your energy provider?



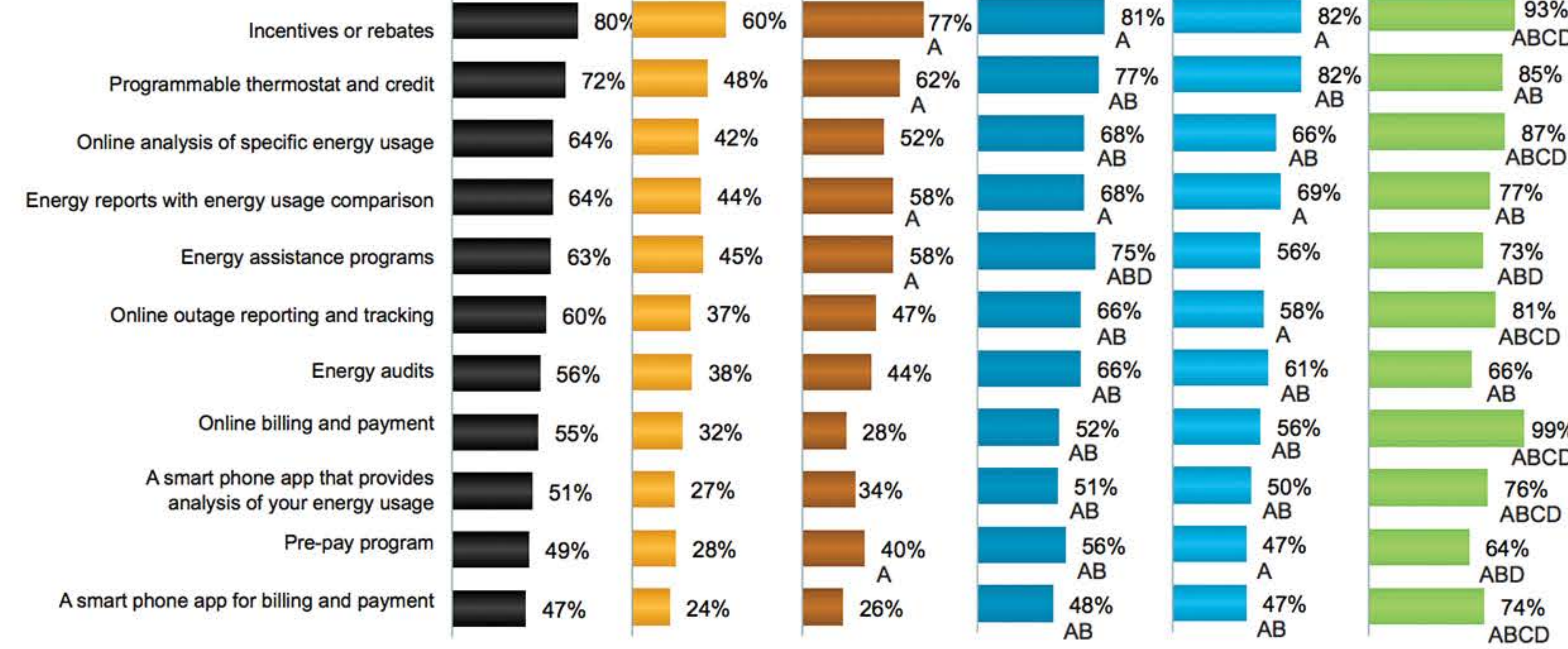
Base: All respondents.
Source: Accenture, New Energy Consumer research program, 2015 consumer survey.

SEGMENT	OPPORTUNITIES
Green Champions	Tendency toward environmentalism as well as early technology adoption, coupled with relatively high income, makes them attractive prospects for smart energy technology and programs. Third party innovations and progressive utility offerings will appeal to this group.
Savings Seekers	This segment has serious budget concerns and high interest in saving money. New pricing programs that can help reduce their bills are appealing, along with such programs as energy audits, and energy assistance.
Status Quo	Low electric bills, high utility satisfaction and low interest in new technologies, products, and services make it difficult to engage this segment. To encourage change, products and services should emphasize ease of use and minimize disruption of long-term habits. Nevertheless, this segment is unlikely to be enthusiastic about adopting smart energy lifestyles.
Technology Cautious	With comfort more important than conservation and resistance to technology, this segment presents challenges. As with the Status Quo segment, products and services should emphasize ease of use and minimize the need for lifestyle changes. Consistent messaging emphasizing comfort and convenience may make inroads with this segment over time and, as this is the second-lowest income segment, some will be motivated by savings.
Movers and Shakers	This segment is the most affluent, likes technology, and has some interest in efficiency. Nevertheless, comfort, convenience, and ease of use come first. Offerings that use technology to minimize effort, avoid inconvenience, and maximize comfort will make inroads with this group and may also lead to improvements in overall satisfaction.



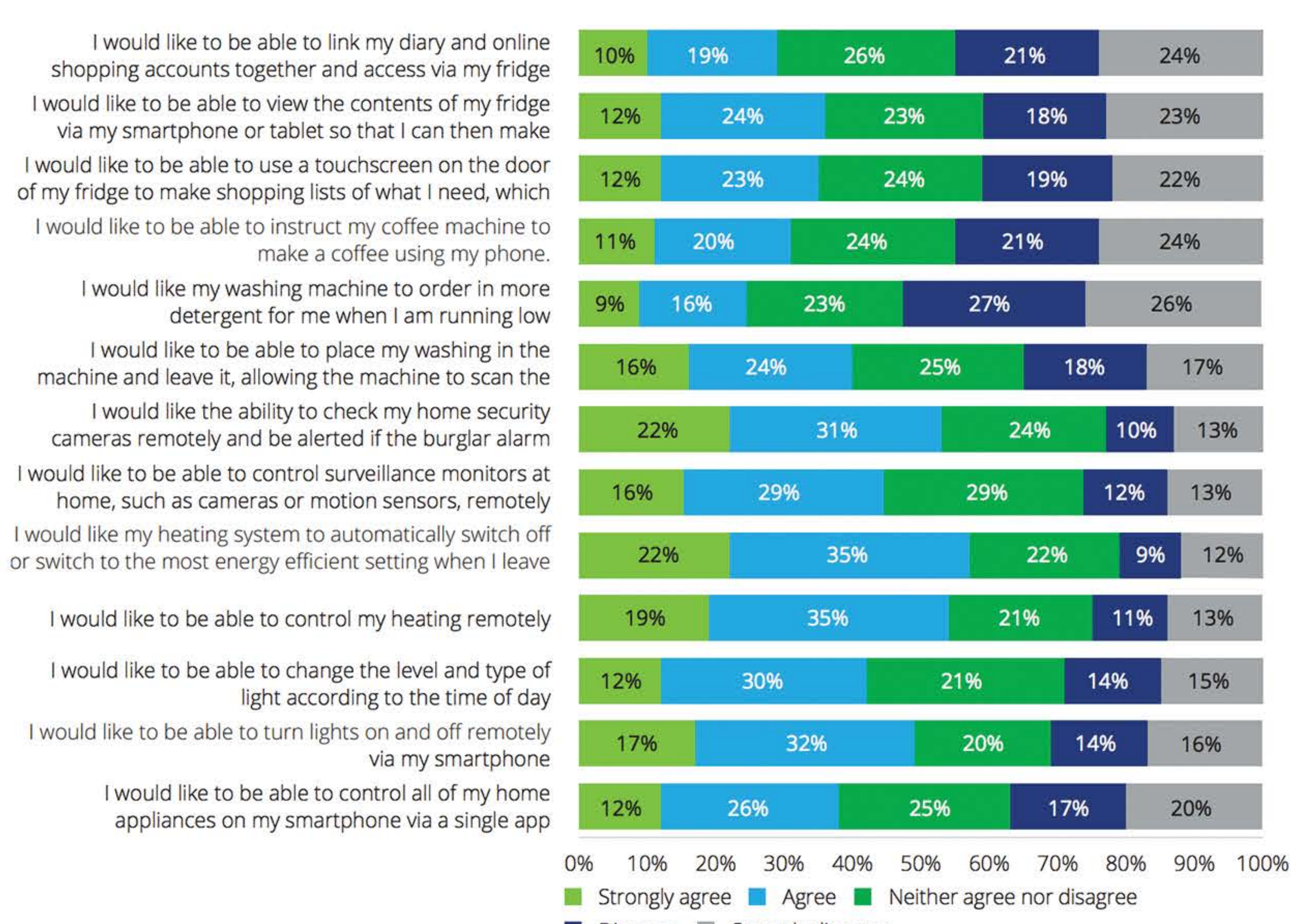
Utility Programs & Services: Level of Interest (Among Those Not Currently Using)

% Somewhat/Very Interested



Base: Consumers Not Currently Using Program/Service
A,B,C,D,E indicate significant differences between segments
QAC1-QAC11. How interested would you be in using the following if your electric company provided it?

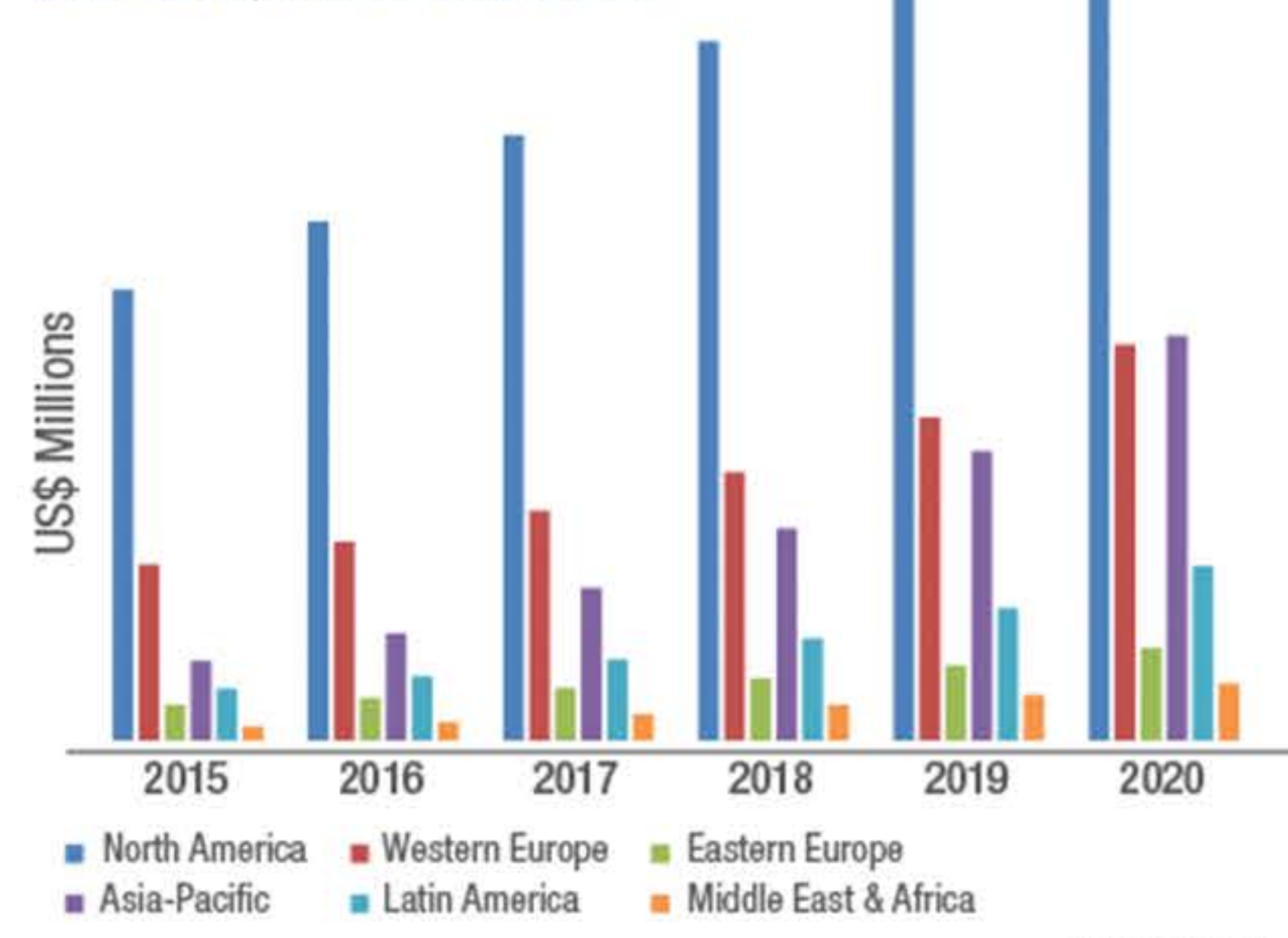
Figure 1. Perceptions of utility



Base: UK consumers 18+ (n = 2076)
Source: Deloitte research, May 2016

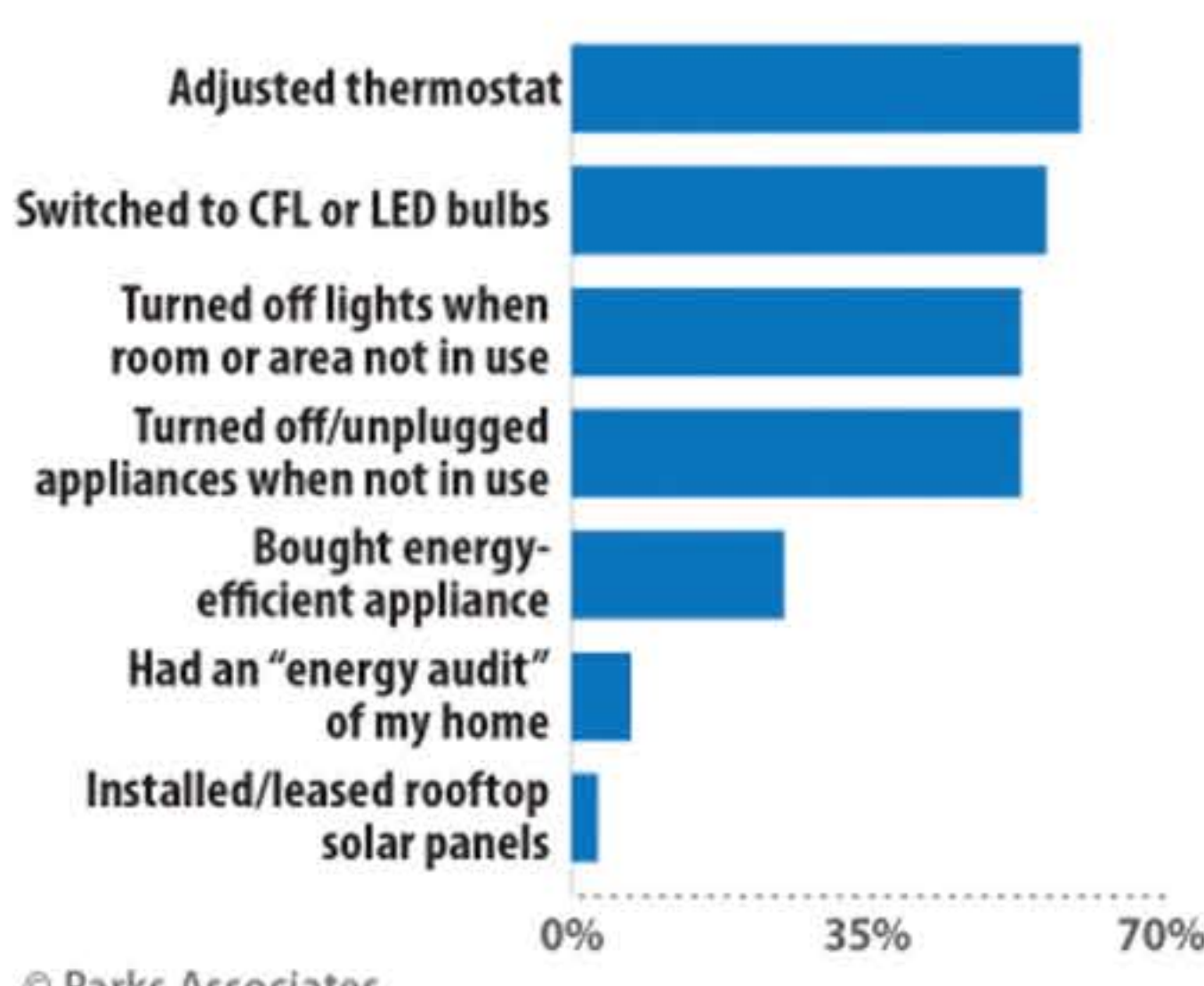
Smart Home Automation System Revenue by Region

World Market, Forecast: 2015 to 2020



Energy-Saving Actions in Last 12 Months

U.S. Broadband Households



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	IRIS	NEXIA	SmartThings	connect	vera	wink	zipato
Price	\$179.00+ \$9.99 monthly fee	\$79.00 \$9.99 monthly fee	\$99.00	\$79.95	\$149.95	\$50.00	\$199.95
Languages	Z-Wave ZigBee	Z-Wave	Z-Wave ZigBee Cloud-to-Cloud IFTTT	Z-Wave Lutron Clear Connect Bluetooth Wi-Fi	Z-Wave GUARANTEED	ZigBee Clear Connect Bluetooth Wi-Fi	Much more with add-on modules
NUMBER OF Compatible Products	50	73	116	67	1,200+	60	1,200+
Control Options	Smartphone or Computer	Smartphone or Computer	Smartphone	Smartphone or Computer	Smartphone or Computer	Smartphone or Relay Hub	Smartphone or Computer
Scenes	Only with Premium Service	Intermediate scenes possible	Advanced scenes possible + developer base	Simple scenes possible	Intermediate scenes possible	Simple scenes possible	Advanced scenes possible
Host	Cloud	Cloud	Cloud	Local	Local	Cloud	Local
Perfect For	People who want an easy beginner set to get started	People who want it to be as easy and pain-free as possible	People who want scenes but don't want to program themselves	People who want one device to "speak" everything	People who want to connect ANY Z-Wave device to their hub	People who want to "try out" home automation	People who are more tech-savvy and want a customizable experience

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- The revenue of developing smart home are increasing all over the world
- Potential users are movers and shakers
- Exclude the cost, users concern the security, privacy and the ease of use
- For existing users, they are interested in their bill and data analysis
- For not current users, incentive and rebates are more attractive for them

Conclusion

- The interface of the app has to be very friendly
- Infographic can help alot or transfer the saving energy into more meaningful way (e.g. how many trees you have saved this month)
- The level of automation has to be flexible
- Different appliances can according to users' location, electricity-savvy, users behaviour and so on to adjust