



Strategic Insights Study

# Audience Analysis – Residential

# Introduction & Methodology

---

## OVERVIEW

Methodology, data collection and analysis by Endeavor, on behalf of EC&M.

Methodology conforms to accepted marketing social listening research methods, practices and procedures.

## PRIMARY OBJECTIVES

- Better understand the audience's needs, challenges and goals during the buying process.
- Determine what their needs are at each stage of the journey, and what content they are consuming at each point.
- Find where the audience goes online and who influences them during the buying process.
- Uncover the topics that resonate most with the audience and at what stage in the cycle.

## METHODOLOGY

Through a combination of robust third-party tools, we look across online media types (blogs, forums, social media channels, mainstream news, etc.), during a specific time period, based on study objectives & goals.

Using manual research, our experienced analysts are able to go beyond traditional channels to uncover additional audience and industry insights that would not be collected through tools alone.

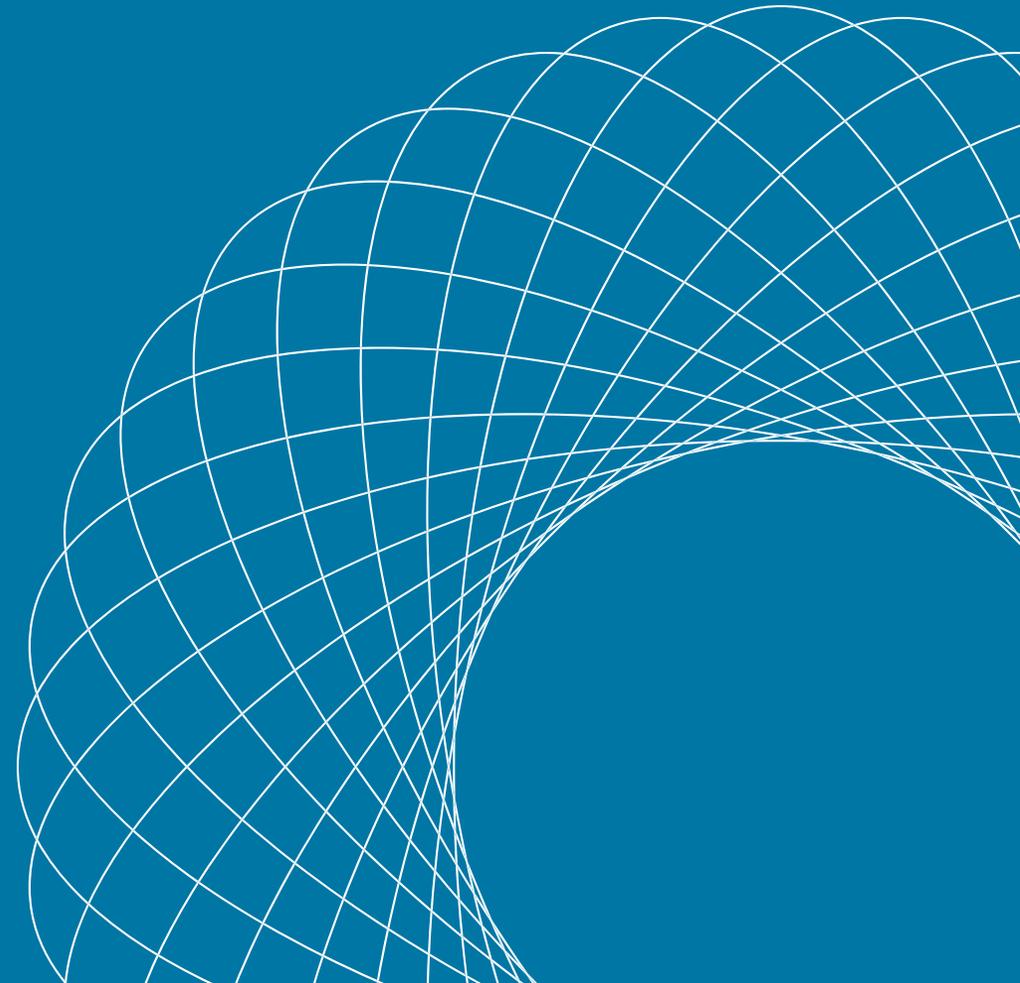
## ANALYZE & ASSESS

Findings are explored, insights are identified, opportunities are outlined and content is reviewed.

After identifying key insights, we are able to validate and/or expand on the findings with Informa's own industry experts.

This collaboration of qualitative and quantitative research results in the findings that are published in this report. We align insights with marketing recommendations and provide a path of execution for you to use this data moving forward.

# Key Findings: Homeowners & Homebuilders



# Key Insights & Trends: Smart Homes

## Smart Home Automation

Homeowners drive the majority of smart home conversations, and most of the related content online is targeted at this audience. There are many online sources, especially forums, where they are going for information. Often there are brand-specific sites where homeowners can congregate to discuss the products more in-depth either during the decision-making process or after they purchase.

## Homeowner Influencers

Homeowners primarily go online when they start the smart home buying process. They often do research via search engines and gradually move onto forums where they connect with peers. Typically, they already have narrowed down the brands they are considering once they ask questions on forums.

## Homebuilders Consider the Family

Residential homebuilders are keeping the needs of a family in mind when incorporating smart home technology into new builds. Including smart home technology is considered an industry standard, but some builders go a step further by [focusing on the every day needs of a family](#) when deciding what to include and where to install it.

## Designers are Interested in Automation

Interior designers are looking for more information around automation. When they are incorporating automated tech in their designs, designers are most interested in kitchen and bath technology. Designers want more information on [smart appliances](#), [centralized lighting](#), and [voice-activated devices](#), in particular. Automation installers or integrators are working with some designers to help them accomplish these goals.

## By the Numbers

- 47% of homeowners polled by Houzz have some type of connected technology or automation in their home. – [NKBA & Houzz 2019 Poll](#)
- Homeowners are using voice-controlled assistants (e.g., Amazon Alexa, Google Home) the most (35%), while 20% report using smart light bulbs. – [HomeServe Biannual State of the Home Survey](#)
- 59% of homeowners planning a kitchen remodel in the next two years plan on incorporating technology solutions in their kitchen design. – [NKBA Kitchen Technology Study](#)
- When it comes to interior designers integrating technology, 68% have little or no tech recommendations for their clients. – [NKBA Kitchen Technology Study](#)

# Key Insights & Trends: Wiring Devices

## Homeowner Knowledge

When it comes to wiring projects within the home, homeowners are consulting online DIY tutorials and message boards. There are forums designed for homeowners to ask electrical contractors for advice or help. This helps the homeowner understand the process and get the right tools and products. When it comes to purchasing, they are not spending as much time on research before they buy as they do with smart home products.

## Surge Protection Code Changes

There are not many discussions from any of the target audiences around the changes to surge protection codes. Surge protection content is mostly targeting electrical contractors, and, even still, there is not a lot of that content out there in regards to the changing regulations.

## Brand Product A

There were roughly 400 mentions of Product A since January 2019. The majority of these mentions are coming from homeowners and electrical contractors. Products being discussed include panels, GCFI breakers and fuses.

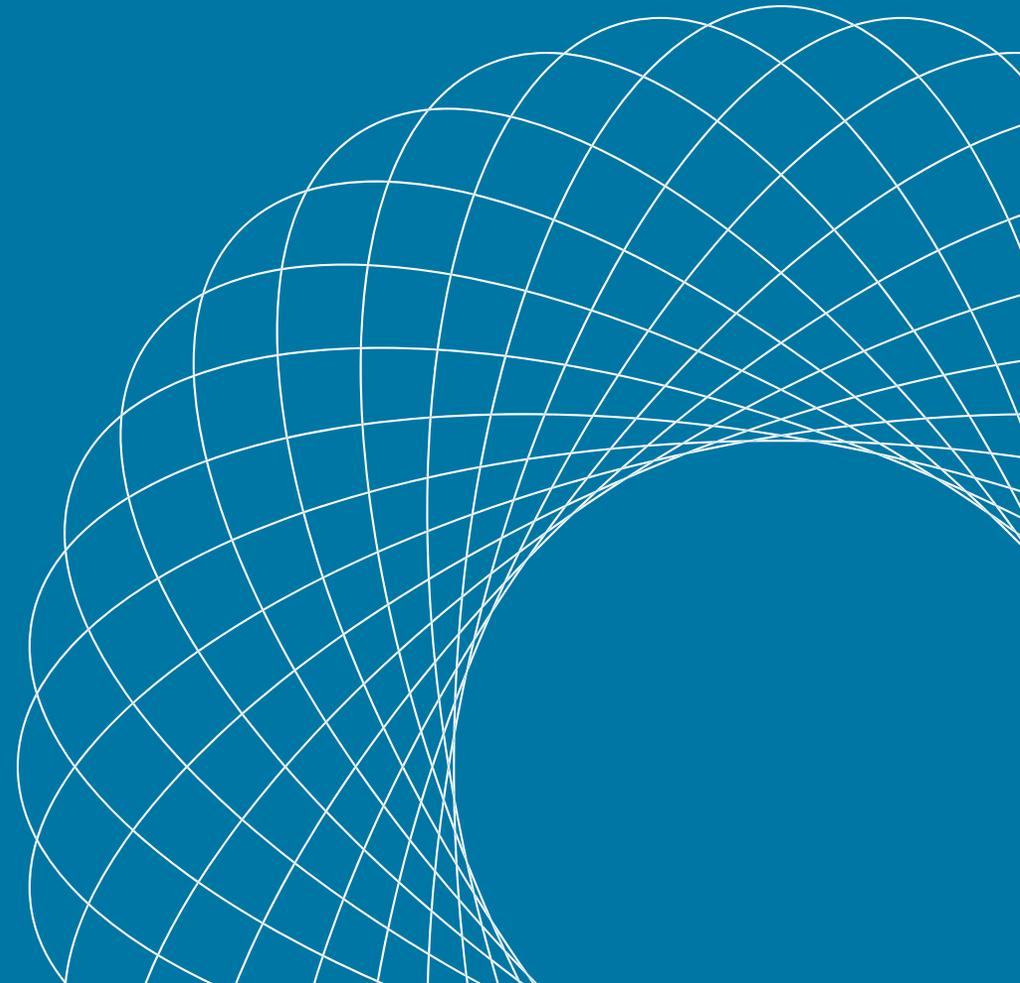
## Homebuilder Purchasing Decisions

Rarely are we seeing homebuilders discussing project costs as it relates to wiring and electrical. Often, this type of job is being contracted out to electrical contractors. Contractors do discuss residential brands, prices and product quality within forums. Product A is mentioned in these conversations along with Competitor 1 and Competitor 2. Contractors are ranking their favorite brands by these differentiators.

## By the Numbers

- The residential market is considered to be about 10-12% of the overall electrical market and about 20% of the overall contractor market. – [Electrical Trends](#)
- Between 2005 to 2018, the average number of interior lighting fixtures per new single-family detached house grew from 27 to 37 fixtures. – [Home Innovations Builder Practices Report](#)
- Outdoor lighting has also experienced a resurgence, increasing from about 5 fixtures per house in 2005 to an average of 11 in 2018. – [Home Innovations Builder Practices Report](#)
- According to the Department of Energy, Homes and residential buildings consume the most energy of any sector, including industrial and transportation. – [Department of Energy Technology Review](#)

# Audience Analysis & Topic Trends



# Residential: Homeowners

---

## What are they saying about...?

---

### Smart Homes?

- Homeowners are spending more time on the buyers journey when purchasing connected devices. They primarily [research online](#) first, using search engines and then moving into forums.
- It is important for them to select devices that will work within the same ecosystems and still address all their needs.
- They are more likely to make purchases online rather than in-store when it comes to connected devices.

### Wiring?

- When taking on their own electrical projects, homeowners will [ask for advice](#) from electrical contractors in online forums.
- Most are making purchases on eCommerce sites, as it is easier to compare prices and read peer reviews.
- If they have not done any initial brand research prior to making an [in-store purchase](#), they will often consult with an associate to get an idea of what product is best.

## What are their Pain Points?

---

- There are a lot of connected devices brands on the market. Once a homeowner selects a brand, they feel they have to commit to that brand, or a compatible brand, for the rest of their system.
- Costs related to hiring contractors are discussed. They want to be savvy enough to know they are not being gouged. They also want to cut contractor costs by taking on smaller electrical jobs around the house themselves.

## Where are they going?

---

- [DIY Chat Room – Home Improvement](#)
- [Houzz](#)
- [HVAC-Talk Forums](#)
- Reddit: [r/HomeAutomation](#); [r/Smarthome](#)
- [Wirecutter](#)
- [Nextdoor App](#)

# Residential: Homebuilders

---

## What are they saying about...?

---

### Smart Homes?

- Not all homebuilders are focusing on the smart home experience, but those that are designing smart homes are [keeping the needs of the family](#) in mind.
- More new home builders are offering “Home Automation Suites” which are add-on packages the homeowner can opt to buy when building a house.
- Builders recognize that more homeowners [rely heavily on Wi-Fi technology and connected devices](#), so they are wiring new homes in anticipation of the homeowners installing these devices.

### Wiring?

- Homebuilders are designing homes with [more light fixtures and outlets](#) than in years past.
- However, most builders are contracting out the work to electrical contractors. This audience segment is most likely to discuss brands, costs and product quality when it comes to residential electrical installations.

## What are their Pain Points?

---

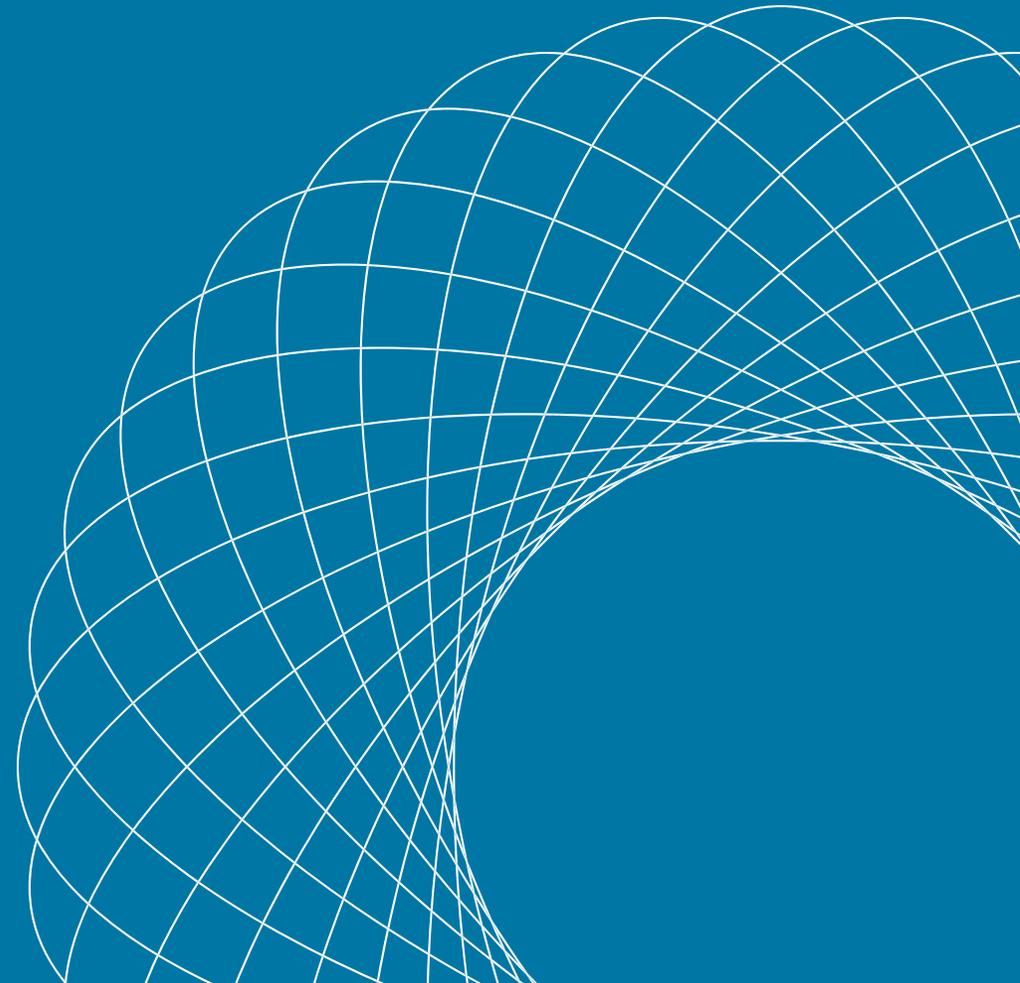
- Better understanding the needs of the homeowner when designing a smart home.
- Working in unison with the homeowner, developer, designers and even municipalities to make sure everything is on track and up to code.
- Keeping an open line of communication with their electrical contractors

## Where are they going?

---

- [Builder Online](#)
- [Houzz](#)
- [Modern Home Builder](#)
- [National Association of Home Builders](#)
- [Professional Builder](#)

# Recommendations



# Top Trending Distribution Channels & Resources

---

Homeowners, builders and interior designers are visiting a lot of industry-specific publications. Homeowners are more actively talking online, but there are forums where all three audiences can be found. Consider creating and distributing content across these platforms:

## Publications & Blogs

- [Builder Magazine](#)
- [CEPro](#)
- [Fine Homebuilding](#)
- [For the Smart Home](#)
- [Houzz](#)
- [HVAC-Talk Forums](#)
- [Interior Design](#)
- [Professional Builder](#)
- [Reach Home Builders](#) (Region-specific)
- [Smarthome](#)
- [Wirecutter](#)

## Trending Social Channels

- Twitter
- Industry Networks
- YouTube
- Blogs

## Trending Content

- Blogs
- Infographics
- Videos
- Articles
- Buying Guides
- Mobile Apps

# Sample Marketing Campaign by Audience

Audience	Topic	Inform		Engage		Advance	
Homeowners	Brand Awareness in Automation & Wiring	<b>Buying Guide:</b> Smart Home Checklist: What Homeowners Need to Know	<b>Infographic:</b> Product Offerings and Use Cases	<b>Video Series:</b> Preparing your home for connected devices	<b>Quizzes:</b> Are you smarter than your home?	<b>Content Portal:</b> Homeowner Resources	<b>Blog:</b> Updated Automation & Electrical Content
Homebuilders	Balancing Customer Needs & Industry Trends	<b>Custom Survey:</b> Home Automation Industry Trends	<b>Infographic:</b> What do Homeowners want in a Smart Home?	<b>Webinar:</b> Keeping up with Codes	<b>Blog Series:</b> Managing the Needs of Homeowners & Developers	<b>Buying Guides:</b> Products to Make Smarter Homes	<b>Case Studies:</b> How builders are creating smart homes



# Industry Influencers



## Eric Blank

- Eric is the editor of [The Smart Cave](#) blog, a site that provides homeowners with advice, industry trends and product recommendations around smart home technology.
- Eric is going out and doing a lot of research in order to help homeowners make better decisions and save money.



## Alysa and Reed Kleinman

- Alyssa & Reed run the blog, [Smart Home Solver](#). The blog provides in-depth comparisons and helps homeowners understand where they should spend their money in building the ultimate smart home.
- The Kleinman's produce a lot of video content on their [YouTube channel](#). Their channel has over 51,000 subscribers.



## Travis Leo

- Travis is a [residential home builder](#) who specializes in building and designing homes that are pre-wired for smart home automation and technology.
- He is [creating content](#) encouraging home builders who might be on the fence about smart homes to build for the homeowner.

# Thank you!

Jennifer Sigwart, MPS  
Data Analyst, Market Research  
Endeavor Business Media

T (734) 887-6878

E [jsigwart@endeavorb2b.com](mailto:jsigwart@endeavorb2b.com)

W [endeavorbusinessmedia.com](http://endeavorbusinessmedia.com)

