Connected Technologies are Changing the DSM Customer Engagement Landscape

November 2018
25 million

Juniper Research, *Who Is Winning the Race to Smart Home Automation*, June 2018
June 2018

25 million

Voice Assistant Devices

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Voice Assistant Devices

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Smart speakers are the fastest growing consumer electronics category
Assistant adoption grew 9x in the last 12 months

- Google Assistant will be available on 95% of Android devices
- 200M+ smart devices in the home including smart speakers, TVs, headphones, etc
- 10,000+ devices across 1,000+ brands that can be controlled using the Google Assistant
Ecosystem breadth and interoperability

**Supported**
- Cameras
- Dishwashers
- Doorbells
- Dryers
- Lights
- Plugs
- Thermostats
- Security systems
- Switches
- Vacuums
- Washers
- Fans
- Locks
- Sensors
- Heaters
- AC units
- Air purifiers
- Refrigerators
- Ovens
- Blinds
- Coffee makers
- [De]Humidifiers
- Media centers
- Set top boxes
- Speakers
- Sprinklers
- TVs

**Coming soon**
- Printer
- Toilet
- Tub
- Smart Meter
- Faucet
- EV Charging
- Microwave
- Router
Smart Assistants are the new OS for the Home
Voice assistance is shaping human behavior
It’s part of the daily routine

72% of people who own a voice-activated speaker say that their devices are often used as part of their daily routine.

Think with Google

It’s at the center of the home

Where people keep their voice-activated speakers

- Common room (e.g., family room, living room, etc.): 52%
- Bedroom: 25%
- Kitchen: 22%

Think with Google
It’s a new playground for service providers

Think with Google

It offers a more human relationship with technology

41% of people who own a voice-activated speaker say it feels like talking to a friend or another person.

Think with Google
Additional growth is driven by home control & monitoring

You want to buy another smart speaker…?

- To control appliances or lights in more rooms of your house: 65%
- To listen to news in more rooms of your house: 60%
- To try the technology from another type of smart speaker: 58%
- To use as an intercom system in your house: 57%
- For home security: 49%
- To entertain children in more rooms of the house: 41%

Source: NPR & Edison Research Institute, The Smart Audio Report, 2018
Integration into Routines
Hey Google, good morning.

Good morning Yeye. Today in San Diego, it will be 83 degrees and sunny, your commute to work will be 28 minutes with usual traffic, and there will be an energy savings event from 3:00pm - 6:00pm. Would you like to learn ways you can participate?
Hey Google, I’m taking off.

OK. Turning off the lights, setting Nest Secure to Away and Guarding, and setting your thermostat to ECO mode.
The Thoughtful Home
Thank you