

# Smart Home: Where We are Now

January 2021

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## INTRODUCTION

Scope

Key findings

## DEFINING CONNECTED AND SMART HOME

Defining homes, connected homes and smart homes

Components of connected homes: controlling devices, appliances, cloud

Smart homes are powered by AI-enabled smart appliances...

... and cross-industry connectivity to provide ecosystem services

## COMPONENT TRENDS OF CONNECTED HOME

Controlling devices, connected appliances and Cloud OS

(1) Controlling Devices: smart speaker/home assistant can be a catalyst

Smart TV potential as control hub becoming evident

Voice control on smart TVs can expedite their rise as control hubs

Controlling systems are being built in appliances, is furniture next?

(2) Connected Appliances : Asia leads in connected appliances sales

Connected appliances continue growth momentum despite COVID-19

Connectivity improves brands' agility during COVID-19

Connected washing machines prevail globally due to ideal functionality

High connectivity rate of fridge freezers in South Korea due to joint effort

Air conditioners dominate global connected small appliance sales

(3) Cloud OS: Interoperability now sees barriers due to business priorities

5G tackles latency but not privacy, edge computing might be the solution

Google's Local Home software tool aims to realise "local fulfillment"

## CATEGORY TRENDS OF SMART HOME

Auto-dosing/replenishment and downloadable cycles are now customary

Interconnected washer and dryer is one of the product launch hotspots

Visible interior of connected fridge freezer paves way for AI functions

Inside camera is not a new concept, but AI only just taking advantage

Built-in cameras in smart ovens become pervasive for leading brands...

... and are performing advanced functions outstripping real time monitor

Smart air conditioners upgraded to optimise more than temperature

Energy saving is no longer merely a pre-set mode

Advanced solutions to drive sales of smart appliances

Key takeaways

## THREE KEY FEATURES OF SMART HOME

Three key features of smart home: automated, personalised and holistic

(1) Automated: Voice assistant is omnipresent

Detection of humans and environment promotes automation to next level

(2) Personalised: AI might not be a "must" for personalisation...

... but indispensable to build personalised smart home

Phase I learning: supervised learning – Image recognition is growing...

... scent detection might be another value-added feature of smart models

Phase II learning: self-supervised learning for greater personalisation

(3) Holistic: ecosystem is the key word

The food ecosystem: extensive partnership and sustainability initiatives

Kitchen witnesses rapidly growing ecosystem partnership (a)

Kitchen witnesses rapidly growing ecosystem partnership (b)

Grocery delivery and healthy diet solutions pivotal for partner selection

Emerging models to battle food waste: Gardening and stock underselling

L laundry ecosystem: appliance manufacturers eyeing consumables  
Haier 's pre-treatment products to satisfy pursuit of effective steam wash  
Launch of pre-treatment products is a tactic worth pondering in Europe...  
... and potentially a right fit for the subscription business model  
Key takeaways

## WHERE WE ARE HEADING: POST-COVID-19

Leaders harness megatrends to disrupt a market  
Three key megatrends open opportunities for primary smart home scenarios  
Exploring opportunities post-COVID-19 (1): Smart and experiential cooking  
Exploring opportunities post-COVID-19 (2): Tailored air for home gym  
Exploring opportunities post-COVID-19 (3): AR/VR from store to bedroom  
Key takeaways

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