



CONNECTED HOME 2022

How emerging media technologies are impacting consumers' homes

MAR
2022



ENTERTAINMENT
RESEARCH

EXCERPT OF FINDINGS



Innovative media devices keep coming,
but can consumers keep pace?

A glass half full or half empty?



Half full:

Many new technologies are now present in half of all homes

Smart speaker	52%
Voice-capable TV remote	50%
4K capable TV set	48%
Smart home device	48%

Half empty:

Many of the consumers that own these devices use only a fraction of the capabilities they offer (media or otherwise)



This study measures the media-related tech and devices that consumers use today

- Which tech/devices do they own?
- Which ones are they using to consume or control media?
- Which technologies are in the sweet spot of both growing ownership and increased use?
- What opportunities do these trends create for media stakeholders?



WE SURVEYED 5,204 U.S. CONSUMERS

- Respondents were age 16-74
- Weighted to U.S. Census data,
 - Including age, gender, ethnicity, income, and HH size
- Data collection completed in mid/late February 2022
- All interviews conducted in English



A woman with dark hair and glasses is smiling while holding a smartphone. She is sitting at a desk with a laptop and a folder. The folder has the logo 'DEQ CORPORATION' on it. The background is a blurred office environment.

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KEY FINDINGS

SMART TVS ARE NOW THE NORM

- 76% of TV households now own a smart TV
- 64% of TV HHs stream on a smart TV at least monthly
- 57% of all TVs are now smart TVs
- Increased ownership and more frequent use create compounded growth for smart TV viewers, creating increases in value for streamers, interactivity, and addressable advertising





4K-CAPABLE VIDEO CONTINUES TO GROW

- 52% have a 4K-capable set (4K, UHD, or 8K)
- 67% of 4K set owners have actually watched 4K content
- And there's interest in even higher resolution: 8% claim to own an 8K set, and 14% say they are "very likely" to buy an 8K set this year
- Implication: although 4K is becoming a standard feature for TV sets, increased viewership will begin to drive differentiation of services based on their 4K content offerings



HALF OF HOMES NOW HAVE A VOICE CONTROL TV REMOTE

- 50% of TV households have at least one remote with voice control
- 48% of homes with a voice remote say they use it “all the time” or “often”
- As with smart TVs and 4K viewing, rapid increases in both ownership and frequency of use work together to drive large changes in behavior



HOUSEHOLDS CONTINUE TO GET SMARTER

- Over the past four years, ownership of smart speakers has increased to 52% (2022)
- Net ownership of all other smart home devices also grew, to 48% this year
- Households are adding more smart devices, more smart speakers, and are more likely to link the two – increasing the value proposition of “the connected home”



VIRTUAL REALITY IS STILL LOOKING FOR REAL TRACTION

- Overall, 12% of homes this year report owning a VR device, up a small – but significant – amount since 2019
- Videogaming (73%) continues to be the predominant reason for using a VR headset
- Despite the high-profile launch of the Oculus Quest 2 and multiple firms jumping on the “metaverse” bandwagon, there is little evidence – at this time – that VR appeals to more than a small niche market



PANDEMIC SHIFT TO ONLINE PURCHASES HAS PERSISTED

- In 2019, buying a TV online with delivery directly to home was a secondary choice; most people planning to buy a new TV set said they planned to shop for and buy it in a store
- By 2021, this flipped: 43% planned to buy online. This change is persisting: 45% in 2022 say they will buy completely online
- The pandemic engendered a major change in how people planned to buy even big-ticket TVs – a move also seen for other tech such as streaming players, smartphones, and smart speakers



5G HAS BROAD AWARENESS AND INCREASING INTEREST

- Awareness of the term “5G” is nearly universal, at 87% of all consumers.
- Consumers “very interested” in 5G phone service increased over the past year, from 37% to 50%; those “very interested” in 5G home internet service has also increased from 30% to 42%
- Despite a pandemic-induced hiccup in 5G marketing, and consumer confusion about its benefits, 5G is making inroads into consumer consciousness



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