

智能家居提案報告

Agenda

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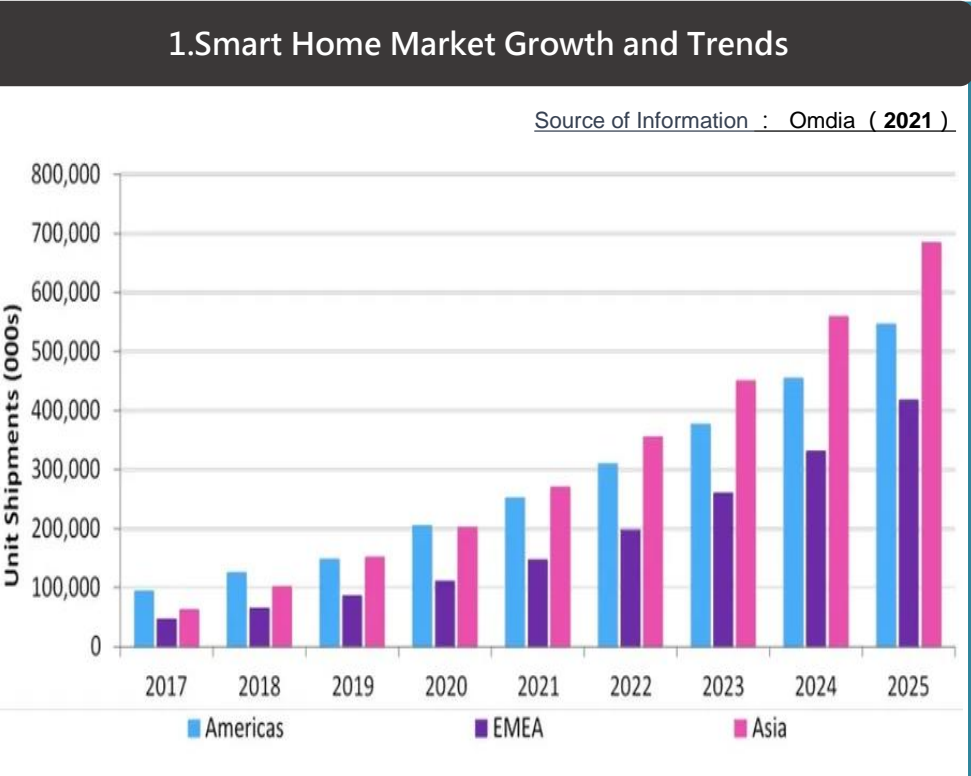
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With the rapid development of smart home systems and the wave of an aging society, we must not only meet the basic needs and convenience of smart home living but also consider the preference differences for smart homes among different household structures and living patterns. Simultaneously, in terms of providing user experiences beyond emphasizing human-machine and spatial interaction to achieve the functions of a smart home steward, there's a greater need to deeply consider the integration of human-machine-human exchange and spatial processes and services. This involves creating an emotional connection between individuals and their homes, providing a sense of companionship, and enhancing user security to realize the goal of becoming a guardian of smart homes.



According to a report by Omdia, the global smart home market is projected to achieve a compound annual growth rate of 24.1% from 2020 to 2025, with an estimated market value of \$178.5 billion by 2025. The global focus on Internet of Things (IoT) technology drives this growth. Grand View Research, Inc. predicts that the Asia-Pacific region will be the fastest-growing area during the forecast period. Emerging markets such as India and China are experiencing market growth due to government investments in intelligent cities stimulating market expansion.

2. Global Insights into Smart Home Users

Smart Home Device Purchase Metrics Among US Households, by Generation, Nov 2021

	Gen Z	Millennials	Gen X	Baby boomers	Total
Purchase penetration (% of total households)	17%	27%	28%	22%	26%
Repeat purchase rate	33%	41%	42%	39%	40%
Average purchase frequency	1.6	1.9	2.0	1.8	1.9
Average household spending	\$122	\$170	\$187	\$167	\$174

Note: 12 months ending Nov 30, 2021; Gen Z defined as individuals born 1996 or later; millennials born 1982-1995; Gen X born 1965-1981; baby boomers or older includes anyone born before 1965

Source: Numerator, "Intellectual Properties: The Continued Rise of the Smart Home," Dec 14, 2021

Source of Information : eMarket

272764 InsiderIntelligence.com

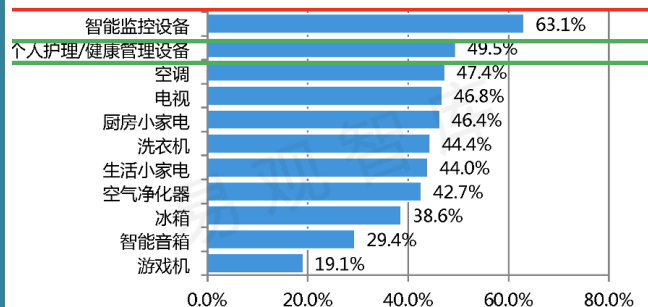
Based on the comprehensive insights into global smart home users, the primary target audience for the smart home market is the Millennial and Generation X cohorts, aged 25 to 56. These two generations share common characteristics, such as having a certain level of economic stability and a strong emphasis on enhancing their quality of life. They are willing to invest in innovative products that align with future trends, all in pursuit of a modern and convenient lifestyle.

- #### The Millennial Generation (Ages 28 to 39)
- Embrace of Smart Home Technology: They are open to buying additional components to enrich their smart home setups. They appreciate the convenience and efficiency that automation adds to their daily routines.
 - Priority on Innovation and Future-oriented Features: They place a premium on smart home solutions aligned with upcoming trends and technological progress.
 - Tech Enthusiasts and Early Adopters: Given their enthusiasm for technology, They will likely be early adopters and influencers in advanced smart homes.
- #### The Middle to High-Income Consumer Group (Ages 41 to 56)
- Family Focus: They tend to prioritize matters related to their families. Their smart home preferences are often influenced by how technology can benefit and support their households.
 - Future Planning and Image: Future planning is central to their decision-making. These consumers consider how smart home solutions align with their long-term goals and aspirations.
 - Health and Sustainability: Health and environmental concerns guide their preferences. They are drawn to smart home devices that promote wellness and sustainability.
 - Willingness to Invest in Brands and Quality: They are open to spending more on recognized brands and assured quality.
- #### Tech Enthusiasts (Ages 30 to 40)
- Tech-Savvy Demographic: Centered around ages 30 to 40 and predominantly male, this demographic exhibits a strong affinity for cutting-edge smart home technology.
 - Embrace of High-Tech Solutions: Individuals within this group have a genuine passion for high-tech smart home solutions. They eagerly adopt the latest advancements in the field, seeking to incorporate them into their daily lives.

3.Smart Home User Needs Analysis

Source of Information：中国智能家居市场专题研究报告(2015)、東方快線調查報告 (2012)

被访者感兴趣的智能家居产品

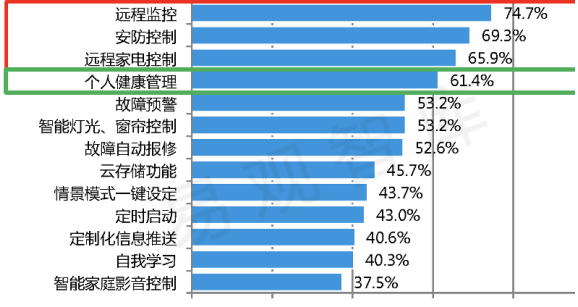


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被访者认为智能家居产品应具备的功能

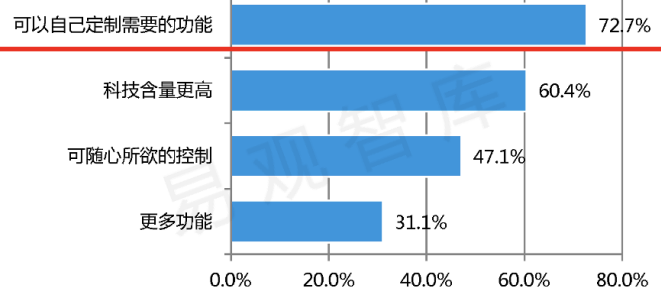


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被访者认为智能家居和普通家电产品的区别

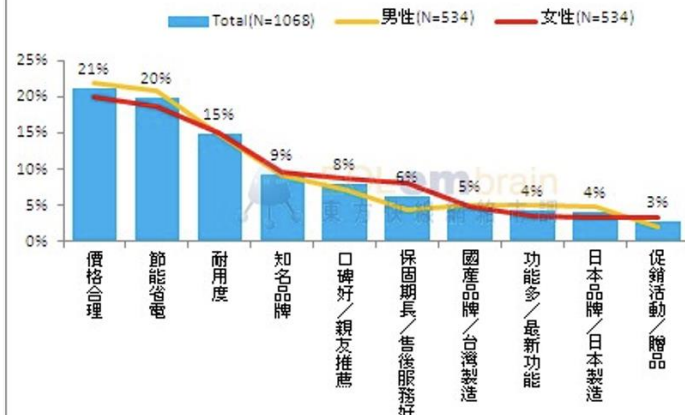


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圖1：購買大型家電商品(包含冷氣機、電冰箱、電視)時主要的考量因素



User Demands:

Strong desires for home automation, safety, energy efficiency, and convenience, with particular emphasis on smart monitoring and health management.

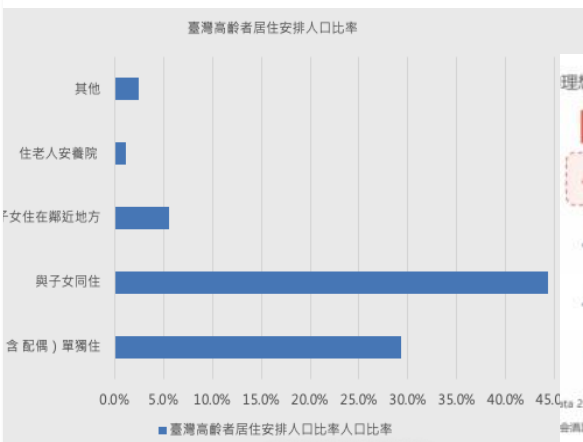
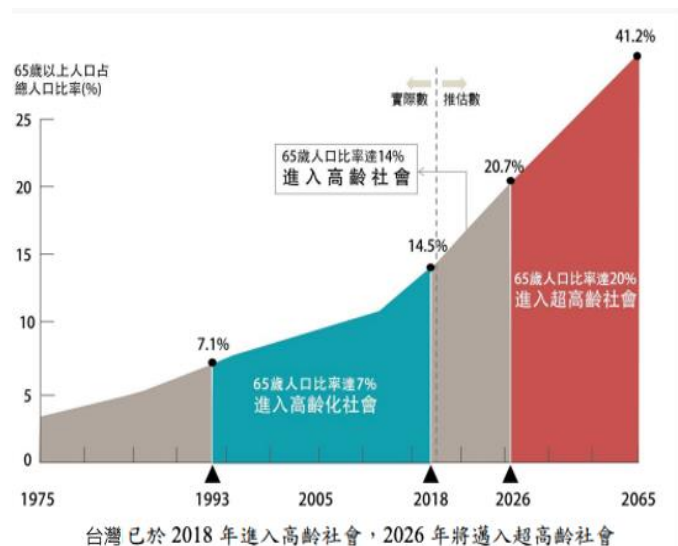
Comparison between Home Appliances and Regular Appliances:

Most users expect personalized function customization to meet their individual needs.

User Purchasing Behavior: Highlights consumers' balance between seeking brands, cost-effectiveness, and quality.

4.Future Trends in Aging Population and Residential Patterns

Source of Information：國家發展委員會 (2018)、國立雲林科技大學,數位科技時代下我國超高齡社會 因應策略委託研究案 (2019)



理想智慧家居调查



数据来源：CBNData 2021年12月调研数据

会满足您哪些需求？（多选）N=2,000

消费者对理想智慧家的安全感体现



数据来源：CBNData 2021年12月调研数据

数据说明：您认为智能家居应满足哪些您对您安全感的诉求？（多选）N=613

大数据·全周期

In 2026, Taiwan's demographic landscape will transform, with the elderly population reaching 20%, marking the transition into a super-aged society. Middle-aged and younger consumers will include smart home devices catering to the elderly in their purchasing considerations.

1.Competitor Analysis				
	Sharp (Based on Customer Analysis Results)	L G	Xiaomi	Samsung
Target Audience	<ul style="list-style-type: none">• B2B Business Unit: Enhancing Smart Solutions• Middle-Class Families: Quality Living, Convenience• Millennials and Generation X: Tech Enthusiasts• Quality of Life Seekers: Elevate Home Experience• Caregivers and Caretakers: Safety and Security	<ul style="list-style-type: none">• Home Consumers: Convenience, Energy Efficiency, Quality Improvement• Tech Enthusiasts: Innovation, Connectivity• Quality-Conscious Individuals: Health, Comfort, Air Monitoring <p>*Primarily focused on residential and living space smart needs, with a future expansion into B2B solutions for smart home functionalities.</p>	<ul style="list-style-type: none">• B2B Business Unit: Providing Smart Home Installation Services• Digital Natives: Young Tech Enthusiasts• Price-Sensitive Consumers: Value Seekers• Elderly Individuals: Health and Safety Concerns• Home Consumers: Convenience Seekers• Innovation Followers: Personalized Lifestyle Focus	<ul style="list-style-type: none">• Tech Enthusiasts: Pursuing Novel Technologies, Emphasizing Features and Connectivity• Quality Seekers: Pursuing High-Quality, Reliability, and Durability• Quality-Conscious Individuals: Willing to Pay Premium for Excellence• Business Users: Providing B2B Solutions to Fulfill Commercial Space Smart Needs
User Experience	<ul style="list-style-type: none">• Integrating Human-Technology-Space Interaction to Foster Emotional Connection• Personalized Customization Options to Address Diverse Consumer Needs• Encouraging User Feedback for Continuous Improvement• Enhancing User Engagement for Interactive Collaboration	<ul style="list-style-type: none">• Human-Machine and Space Interaction for Smart Home Management• Enhancing Convenience through Space Interaction and Monitoring• Comprehensive Household Management to Address Diverse Needs• High-Quality Experience with Intuitive Operations	<ul style="list-style-type: none">• Human-Machine and Space Interaction Enabling Smart Home Management• Enhanced Convenience via Space Interaction and Monitoring• Comprehensive Household Management for Diverse Needs• Superior Experience with Intuitive Operations	<ul style="list-style-type: none">• Human-Machine and Space Interaction for Smart Home Management• Enhanced Convenience through Space Interaction and Monitoring• Comprehensive Household Management to Address Diverse Needs• Superior User Experience with Intuitive Operations
Brand Positioning	<ul style="list-style-type: none">• Emphasis on High Quality, Innovation, and Reliability	<ul style="list-style-type: none">• Embark on an Intelligent Life with LG ThinQ	<ul style="list-style-type: none">• High Value and Innovation in Smart Home Solutions	<ul style="list-style-type: none">• Driven by Innovation, Leading Technology
Advantages	<ul style="list-style-type: none">• Technological Advantage: Sharp's Unique Technological Innovations Bring Intelligent Functionality and Advanced Technological Possibilities.• Reliable Quality: Outstanding Quality Ensures a High Standard of User Experience, Gaining Market Trust.• Brand Influence: A Historical Brand That Builds Trust and Credibility.• Asia-Pacific Market Opportunities: Sharp Expands Rapidly in the Growing Asia-Pacific Smart Home Market.	<ul style="list-style-type: none">• Leading-edge Technology: Offering Innovative Smart Home Solutions.• Comprehensive Household Management: Integrating Human-Machine and Space Interaction for Home Control to Security Monitoring, Catering to Diverse User Needs.• Superior User Experience: Intuitive Interface, Smart Features.• Global Brand: Trusted and Recognized, Garnering Extensive Attention.	<ul style="list-style-type: none">• Competitive Pricing: Offering High-Quality Smart Home Products at Affordable Prices, Attracting a Wide Range of Consumers.• Ecosystem: Boasting a Diverse Range of Smart Home Products, Creating a Powerful Ecosystem.	<ul style="list-style-type: none">• Extensive Reach: Encompassing Multiple Domains, Bridging Technology, Design, and Lifestyle, Creating a Unique Diversity.• Innovative Ecosystem: Establishing a Smart Home Ecosystem, Connecting a Variety of Devices and Services.• Technology Integration: Highlighting Cutting-Edge Technology, Offering Innovative Smart Home Solutions.
Pricing Strategy	<ul style="list-style-type: none">• Shift in Business Model: Cost-effective Manufacturing, Increased Accessibility of Smart Home Products, Low-Cost, Affordable Pricing, Attracting Diverse Customer Segments.• Affordable Pricing: Cost-Effective Manufacturing, Reasonable Pricing, Attracting a Wide Range of Consumers, Encouraging Purchase.	<ul style="list-style-type: none">• Adopting a Diverse Pricing Strategy: Encompassing Products Across High, Mid, and Low Price Ranges.	<ul style="list-style-type: none">• Affordable Pricing: Offering High-Value Smart Home Products, Catering to the Mass Consumer Market.• Promotional Campaigns: Regularly Hosting Promotions, Providing Discounts and Offers to Attract Consumers.	<ul style="list-style-type: none">• Catering to Different Lifestyles with Pricing Models: Encompassing Various Price Points to Meet the Needs of Different Consumer Segments.
Competitor's Promotion Strategies	Companies like LG, Samsung, Xiaomi, and others also follow the strategy of swiftly launching new products and attracting consumers through extensive advertising campaigns. They aim to rapidly introduce innovative products, expand product recognition, and gain market share. These companies recognize the significance of rapid innovation and effective promotion to secure a competitive advantage in the fiercely competitive smart home market.			
Differentiation Strategies	In the smart home market, Sharp has the potential to showcase a higher level of technological integration, with plans to seamlessly integrate diverse functionalities and place a strong emphasis on user experience. In comparison, competitors like LG, Samsung, and Xiaomi are also active in this field. However, Sharp's focus on technological integration and user experience could set it apart significantly in the future. By prioritizing convenient smart control and emphasizing excellent quality and reliability, Sharp could stand out in the intense competition, gaining consumer trust and continuing to lead market trends.			

Sharp Smart Home strongly emphasizes brand positioning focused on high quality, innovation, and reliability. **The brand highlights technological prowess and exceptional quality, merging advanced technology to provide smart home solutions while prioritizing user experience.** Simultaneously, it employs a pricing strategy encompassing high-end and budget-friendly products to cater to diverse consumer needs. Furthermore, **backed by global brand influence, Sharp extends its reach into the Asia-Pacific market,** establishing market trust.

Comparatively, LG, Samsung, and Xiaomi also exhibit robust competitiveness. LG Smart Home centers on technological leadership, offering comprehensive stewardship functions for diverse needs, **with qualities like premium experience, intuitive interfaces, and personalized settings that resonate with consumers. It's projected to expand into business-oriented home intelligent solutions.** Samsung emphasizes technology integration, introducing innovative smart home solutions, and **capitalizing on brand influence and diverse product lines.** Xiaomi employs a price strategy, **offering high-value products that appeal to price-sensitive consumers and the digitally native generation.**

While both Sharp and its competitors pursue technological innovation, user experience, and price advantages, **Sharp's future differentiation lies in its focus on technology integration and user experience. By integrating human-machine-human and spatial interactions, fostering emotional connections, providing companionship, and enhancing security, Sharp aims to create more intelligent, user-centric products that establish emotional relationships in daily life.** This makes the products better suited for different elderly individuals, caregivers, and consumer lifestyles in the future. In this fiercely competitive landscape, the potential to win consumer trust lies in enhancing technology innovation and user experience.

Sharp demonstrates strengths in technology, quality, and brand recognition. Its advanced technology and reliable quality lay a strong foundation, while its deeply-rooted brand history bestows influence. Additionally, Sharp is poised to benefit from the aging population trend. By continuously offering new solutions through technological innovation and addressing the need for diverse smart solutions in the B2B enterprise market, Sharp can tap into new revenue streams and solidify its position in the smart tech field.

However, Sharp also faces challenges. The market competition intensifies, demanding more marketing efforts and brand promotion to maintain competitiveness. Furthermore, entering new markets requires time to build trust. Rapid technological advancements may also pressure the company to stay innovative and ahead in the smart home market.

Overall, Sharp Smart Home has evident technology, quality, and branding advantages. The company is well-positioned to thrive with opportunities stemming from future trends and technological innovations.

Company Strengths and Weaknesses, along with External Opportunities and Threats:

<div><div>1. Technological Advantage: Possesses unique technological innovations, providing high-quality, advanced smart features and solutions.</div><div>2. Brand Influence: As an established brand with a rich history, renowned for superior quality and reliability, it contributes to earning consumer trust and loyalty.</div><div>3. Pricing Strategy: The company's business model shift includes producing higher-end products from Japan while introducing mass-market products at low costs and affordable prices, appealing to diverse customer segments.</div><div>4. Asia-Pacific Market Opportunity: There's potential to explore opportunities in the rapidly growing smart home market, expanding market share.</div></div>	Strengths	Weaknesses
	Opportunities	Threats
<div><div>1. Rapidly Growing Market: The fast-paced growth of the smart home market presents an opportunity for Sharp to expand its market share.</div><div>2. Digitalization Trend: With increasing consumers embracing digital lifestyles, Sharp can offer corresponding smart home solutions.</div><div>3. Aging Population Trend: As the population ages, there might be an increased demand for smart home devices, particularly among elderly individuals concerned about health and safety.</div><div>4. Market Expansion: Sharp can explore more international markets and B2B segments to broaden the sales channels for its smart home products.</div></div>		<div><div>1. Market Awareness: Compared to certain competitors, Sharp's smart home brand awareness might be relatively lower.</div><div>2. Ecosystem Development: Relative to its competitors, Sharp's smart home ecosystem development might be less comprehensive.</div><div>3. Strong Competitors: Brands like LG, Samsung, Xiaomi, and others actively participating in the smart home market will bring intense competition.</div><div>2. Technological Shifts: Rapid technological changes in smart technology pose challenges and opportunities.</div><div>3. Regulations and Privacy Concerns: Smart homes involve regulatory and privacy issues. Adhering to relevant requirements is essential to avoid legal risks and address user concerns.</div></div>

Sharp possesses unique technological advantages and brand influence, yet there's a need to strengthen marketing efforts and ecosystem development to enhance visibility and market share. In the future, targeting consumers such as millennials, Generation X, middle-class households, and health-conscious seniors, Sharp can offer high-quality, reliable smart home solutions. Additionally, the company can expand its sales channels by catering to the B2B sector with intelligent home solutions. However, Sharp must continually innovate and improve in a fiercely competitive market to maintain competitiveness and expand its market share.

Customer & Market Analysis:

Market Overview:

1. The flourishing development of smart homes is being propelled by IoT technology, with the Asia-Pacific region expected to experience the most rapid growth.
2. The global smart home industry predominantly targets the millennial and Gen X generations, who are willing to invest in innovative products with future-oriented features.
3. Consumers have a strong demand for home automation, security, energy efficiency, and convenience, with a particular emphasis on surveillance and health devices.
4. Users place importance on well-known brands while also considering the balance between cost-effectiveness and product quality, showcasing a balanced approach to their purchases.
5. The aging population trend has led to the inclusion of smart home devices in the shopping lists of younger consumers.
6. Considering the diverse housing needs of the elderly, efforts are made to create emotional connections and achieve the concept of a smart home guardian.

Consumers:

1. B2B Enterprises: Seeking intelligent solutions for enhancement.
2. Middle-Class Families: Aspire for a quality lifestyle and convenience.
3. Millennials and Gen X: Tech enthusiasts pursuing innovation.
4. Quality-Conscious Individuals: Striving to elevate their home life.
5. Caregivers: Prioritize convenience, health monitoring, and safety.
6. Individuals with Functional Needs: Require secure smart home solutions.

Competitor Analysis:

1. LG Smart Home: Technological leadership, strong brand influence, catering to diverse needs.
2. Samsung Smart Home: Technological innovation, comprehensive house management, significant brand influence.
3. Xiaomi Smart Home: Affordable pricing strategy, technology integration, appeal to digitally native generation.

Company Analysis:

1. Technical Advantage: Possesses unique technological innovations, delivering high-quality and advanced intelligent features.
2. Brand Influence: Being a historical brand contributes to establishing market trust and loyalty.
3. Pricing Strategy: Shifting business model to include more affordable smart home solutions, offering low-cost, accessible options to attract diverse customers.

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1. Market Awareness: The brand's recognition in the smart home market might be relatively low, requiring enhanced promotional efforts.
 2. Ecosystem Development: The company's smart home ecosystem might be less developed than its competitors.

9、結論

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