

Fast Facts

▶▶ —————
What you need to know about new & emerging trends, platforms or technology

Left To Your Own (Connected) Devices

Examining How Consumers Are Embracing Smart Technology In Their Everyday Lives





Understanding consumer penetration and usage trends across 16 connected devices

The growth of an ever-expanding list of connected devices both at home and on the go - from TVs and wearables to voice-activated assistants and smart home technology - **signals a deeper integration of technology into every aspect of daily life**. This shift not only reflects evolving consumer habits but also **unlocks a host of new occasions for brands to engage** with their audiences in more **meaningful** and **personalized** ways.

Whether it's through in-app ads, voice-activated promotions or tailored video content on connected TVs, marketers have more opportunities to **meet consumers where they are** on the devices they use most and to 'test and learn' with the emerging technologies that are just beginning to grow.

By staying on top of the growth trends of connected devices, marketers can effectively **navigate this evolving landscape** and **unlock new realms for meaningful engagement**.

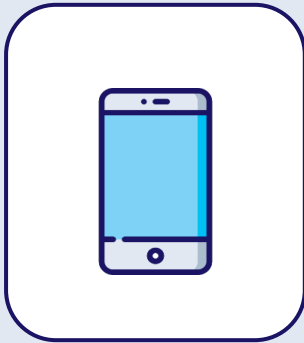
Connected devices continue to expand as they increasingly integrate into all aspects of our lives

16 Connected Devices Examined

Connected TVs



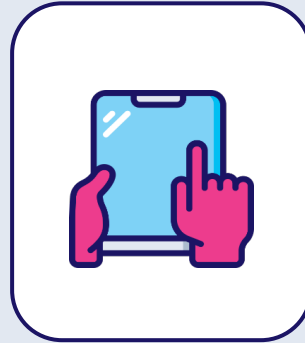
Smartphones



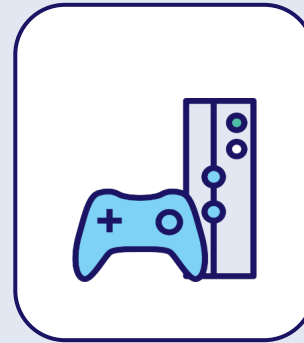
Computers



Tablets



Gaming Consoles



Smart Speakers



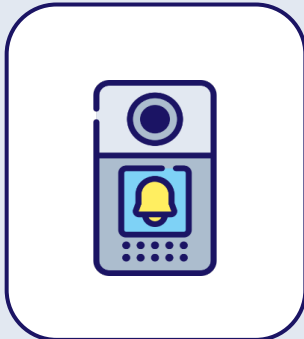
Smart Home Hubs



Thermostats



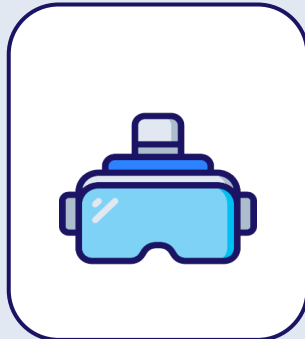
Doorbells



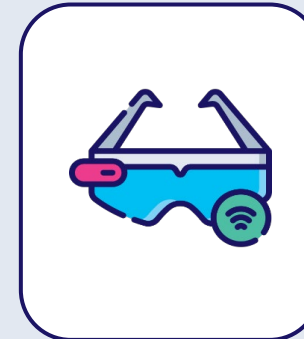
Wearables



AR / VR Headsets



Smart Glasses



Connected Cars

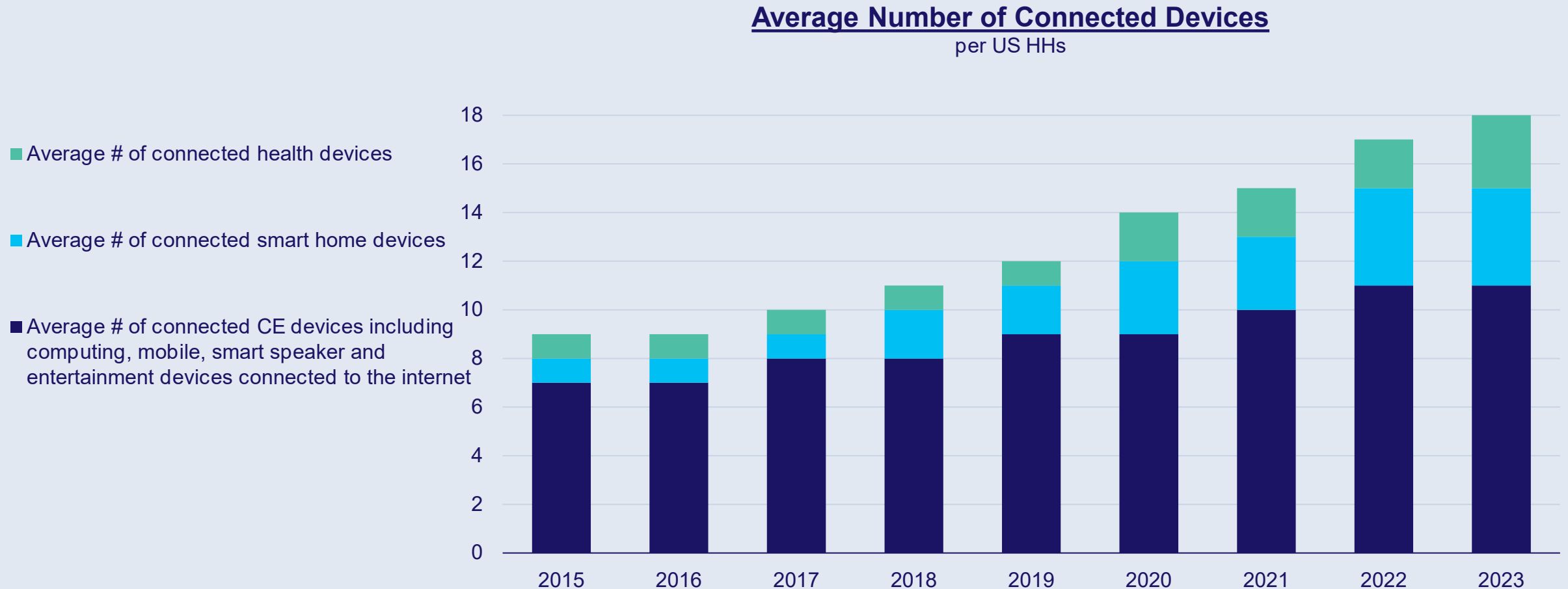


Place-Based
Video Screens



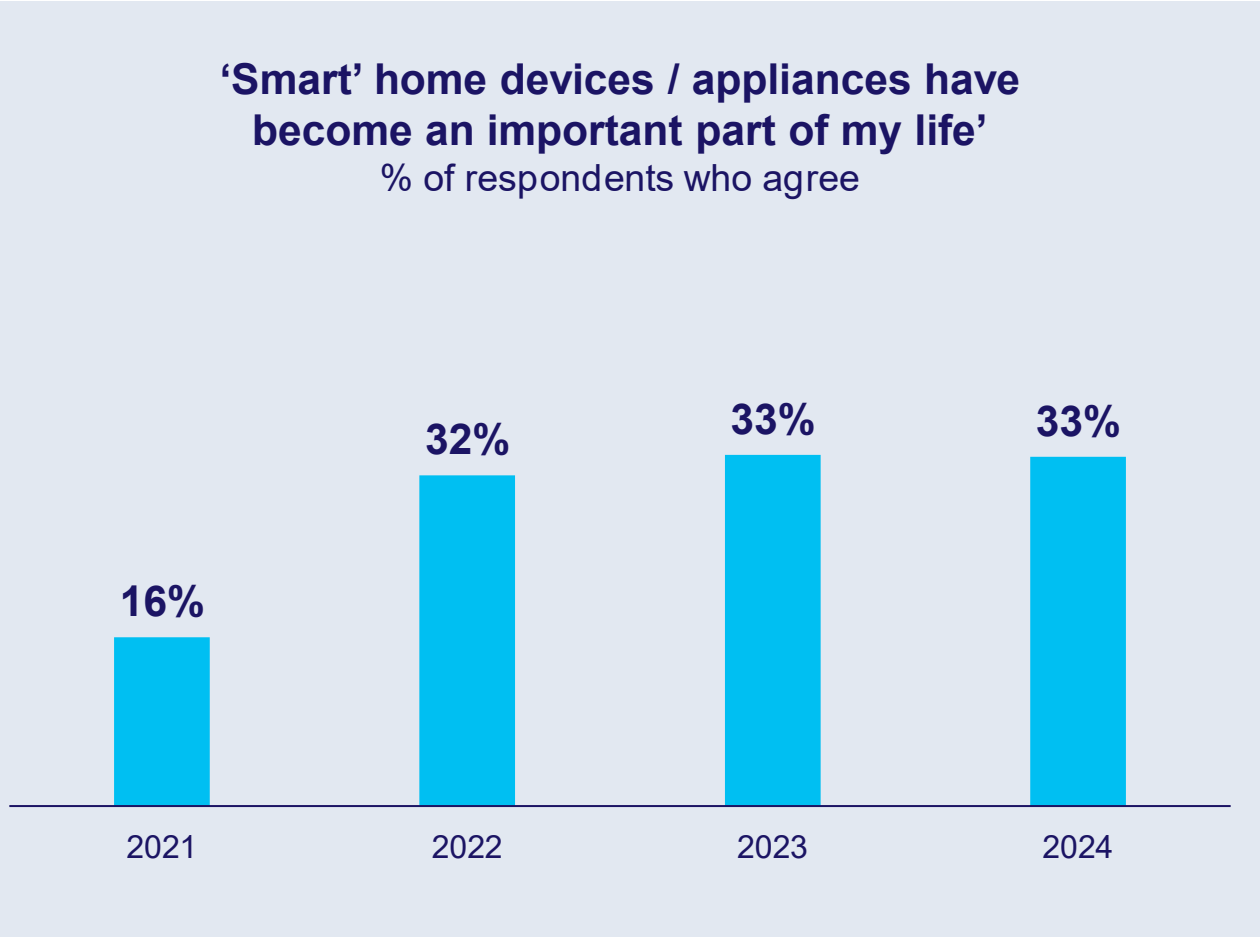
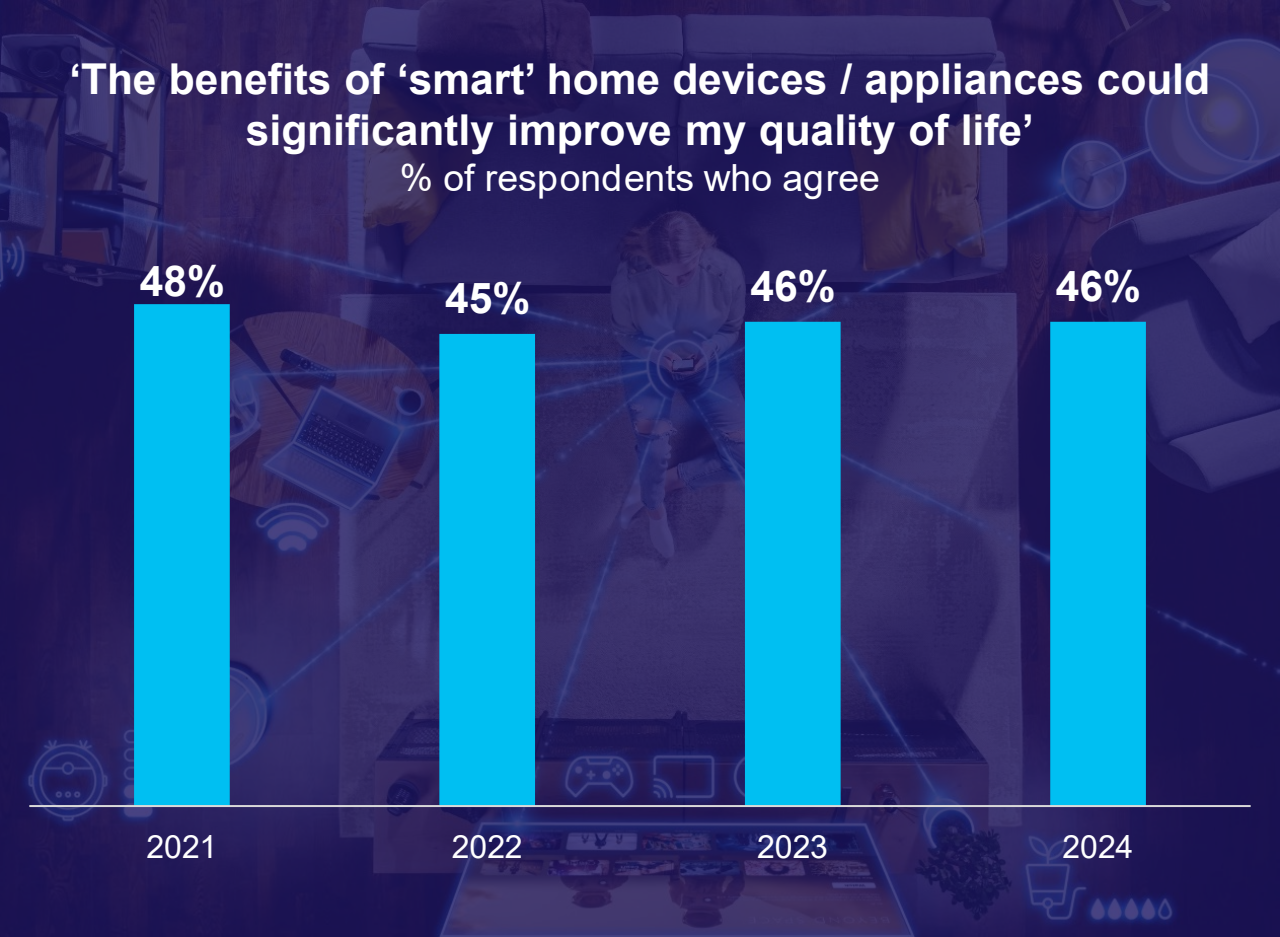
Click through a box above to be brought directly to the appropriate slide

The number of connected devices in households has doubled in less than ten years, which has unlocked fresh avenues for brand engagement



Source: Parks Associates, *At CES 2024, Parks Associates announces new research showing average number of connected devices per US internet household reached 17 in 2023*, January 11, 2024.

Almost half of all adults believe smart devices have **significantly improved the quality of their lives** and are increasingly central to their home



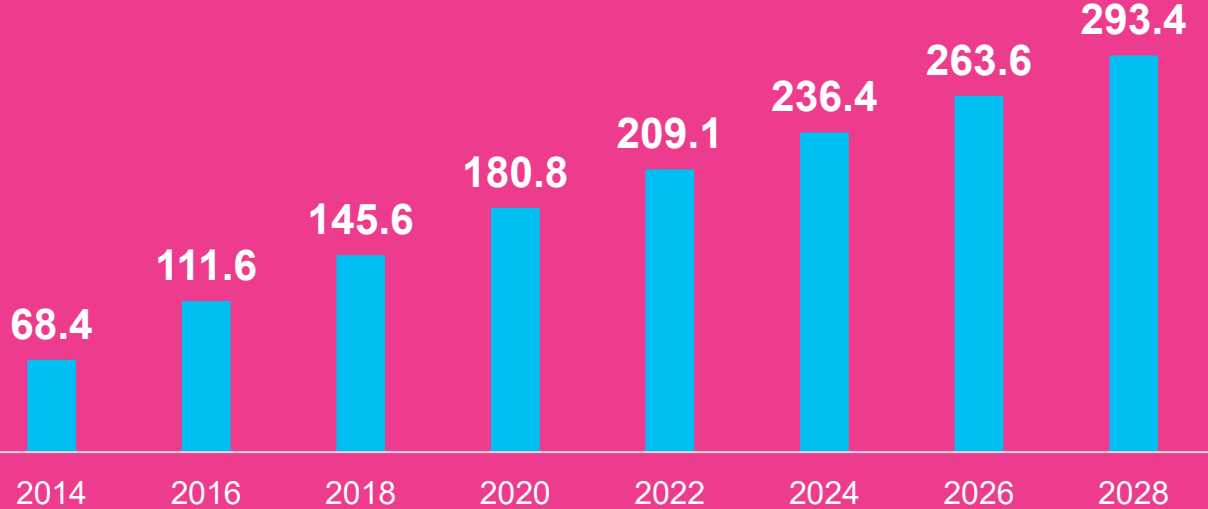
Source: VAB analysis of MRI-Simmons Fall 2021 – 2024 USA Study, A18+. Based on ‘any agree’.

Our 'connected' world represents a mix of well-established devices and an exciting group of emerging technologies which are all seamlessly integrating into consumers' lives



Connected TVs: Two-thirds of all TVs are now Smart TVs as household penetration with multiple smart TVs continues to grow

Smart TV Set Installed Base
In millions



% of Total TV Households



Average # of Smart TVs per HH



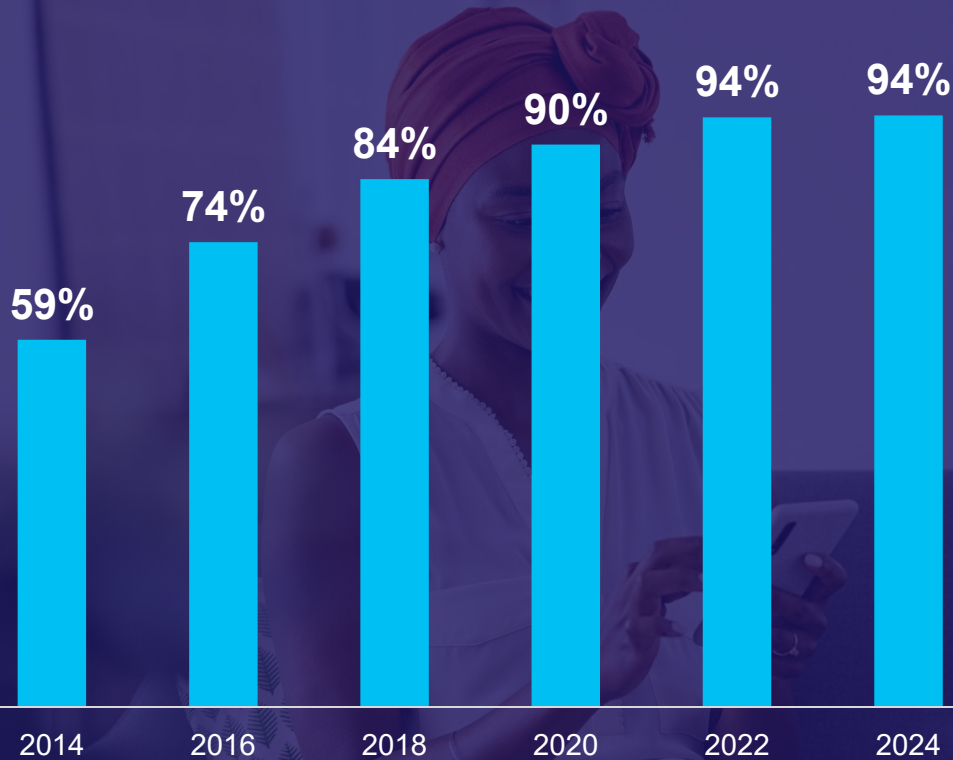
Smart TV % of Total TV Set Installed Base



Source: S&P Global Market Intelligence Kagan estimates; industry data. Data compiled September 2024. 'Installed Base' refers to the total number of units of a product currently in use by customers. Compound Annual Growth Rate (CAGR): 11.0%.

Smartphones: As these devices have become ubiquitous, over a quarter are now using AI features to perform a range of audio and visual tasks

% of A18+ population who own a smartphone



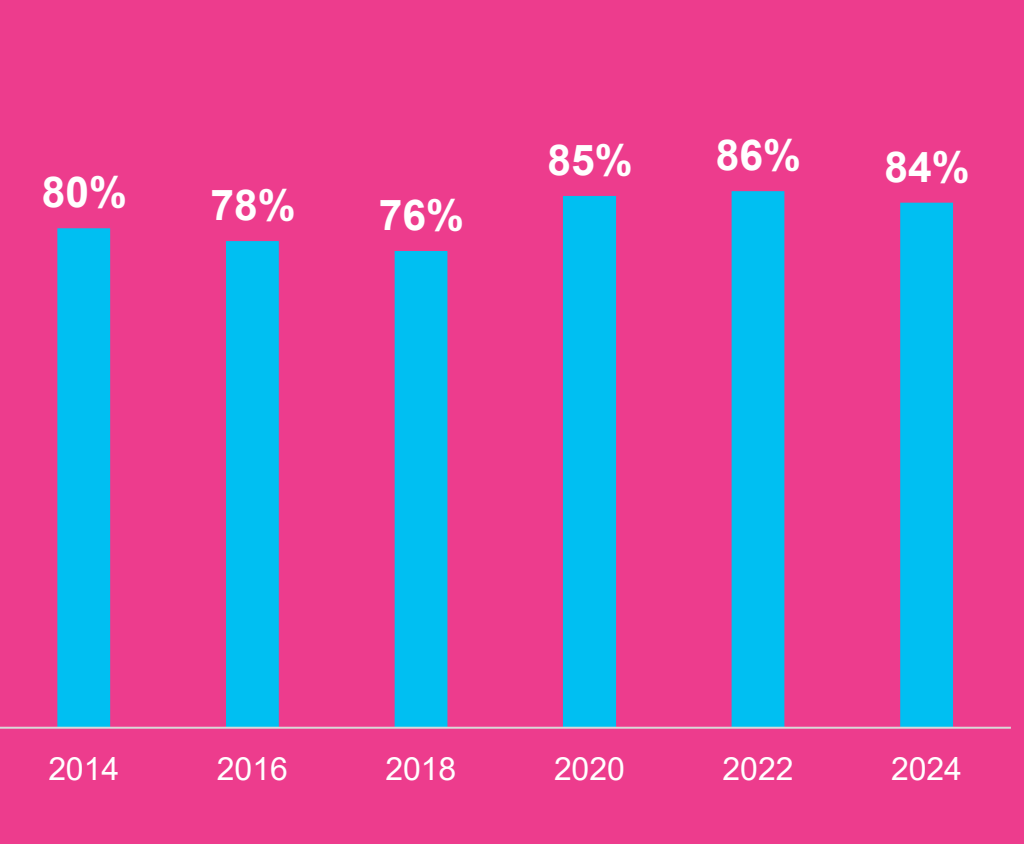
Smartphone AI Features U.S. Adults Currently Use or Plan to Use*
By Age Group

Smartphone AI Feature	18-34	35-54	55+	Total
Voice assistant (e.g., searching the web, taking actions)	33%	28%	20%	26%
Photo and video tools (e.g., object removal, photo and video editing)	31%	25%	14%	22%
Advanced internet search engine	30%	20%	14%	20%
Visual search (e.g., image-based web search, etc.)	30%	21%	11%	20%
Writing tools (e.g., rewriting emails, summarizing)	30%	21%	11%	20%
Image or emoji generation	19%	15%	9%	14%
Organization tools (e.g., adding events mentioned in an email to your calendar)	17%	16%	9%	13%
Dictation and transcription tools	14%	11%	7%	10%

Source: VAB analysis of MRI-Simmons 2014 – 2020 Doublebase and 2021 - 2024 Spring Doublebase USA Studies, A18+. *YouGov as cited in company blog, Sep 30, 2024. 1,221 US adults ages 18+ were surveyed online during September 23-24, 2024. Figures are weighted to reflect population estimates from the Census Bureau's American Community Survey for age, gender, race/ethnicity, education level, and region.

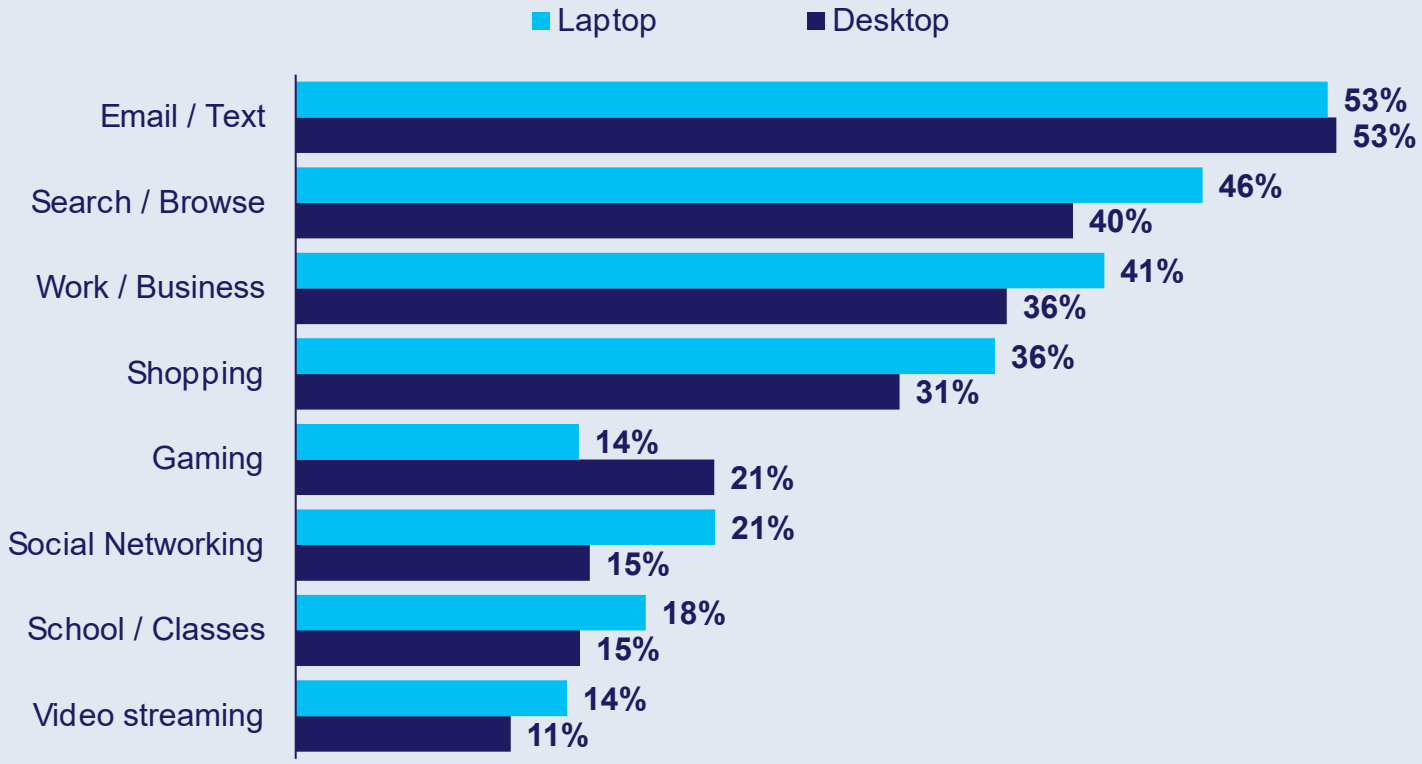
Computers: Ownership has plateaued after a Covid-related bump with the primary activities being productivity tasks like work, email and browsing

% of households that own a desktop / laptop



For what purposes do you regularly use your desktop / laptop?*

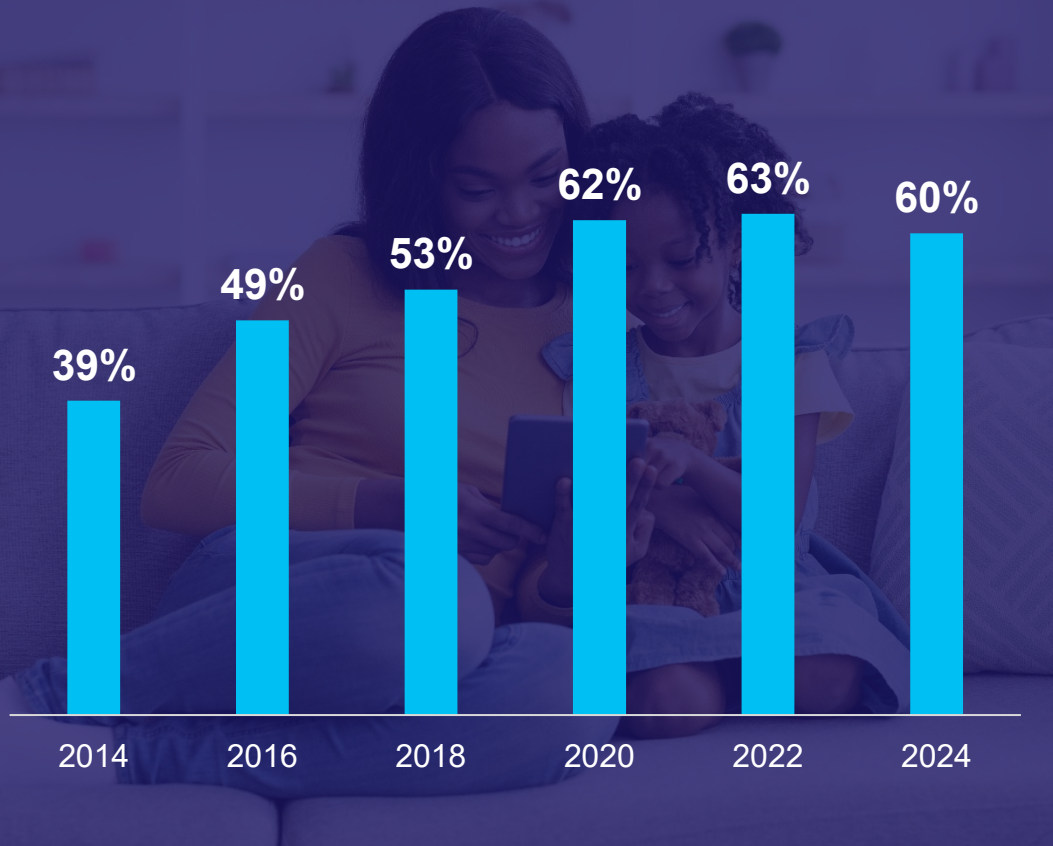
% of respondents



Source: VAB analysis of MRI-Simmons Fall 2014 - 2024 USA study, A18+. *VAB analysis of ARF DASH study, Spring 2024. Based on survey of 10,000 A18+. Q25_5: For what purposes do you regularly use desktop computer 1? 'Desktop 1' refers to respondents' primary desktop. Based on respondent weighting.

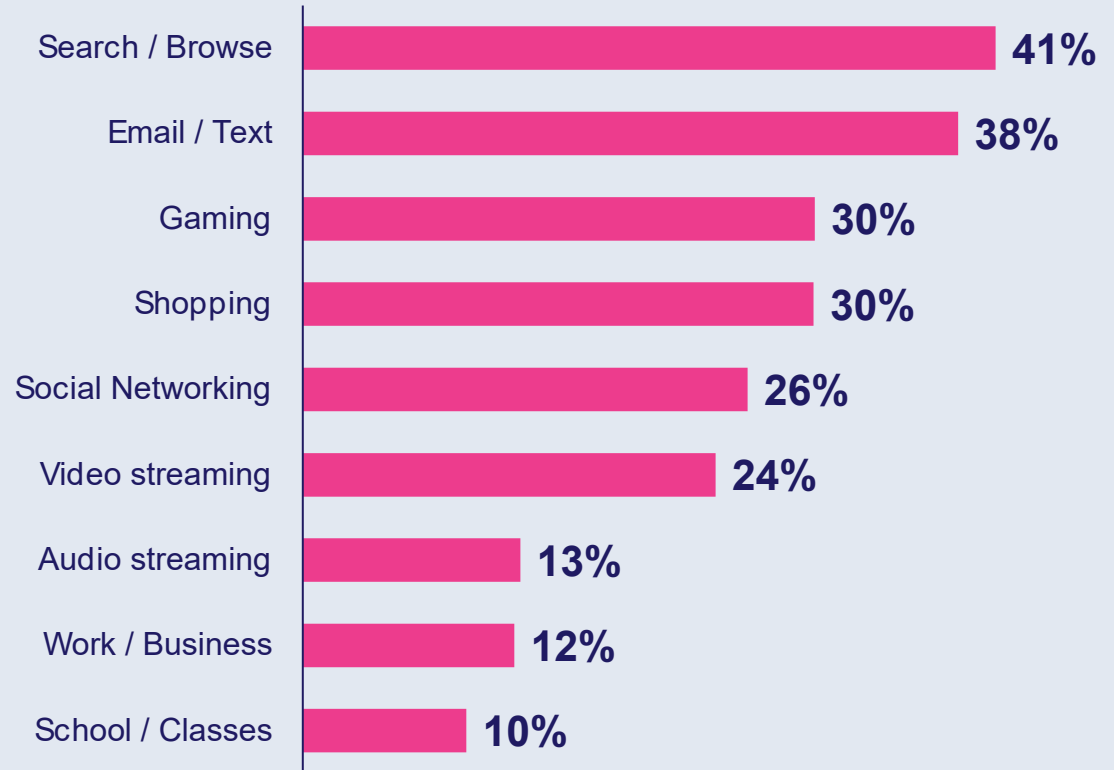
Tablets: Penetration has slowed at nearly two-thirds of adults with the primary activities being search, communications, gaming and shopping

% of adults who have a working tablet or e-reader



For what purposes do you regularly use your tablet?*

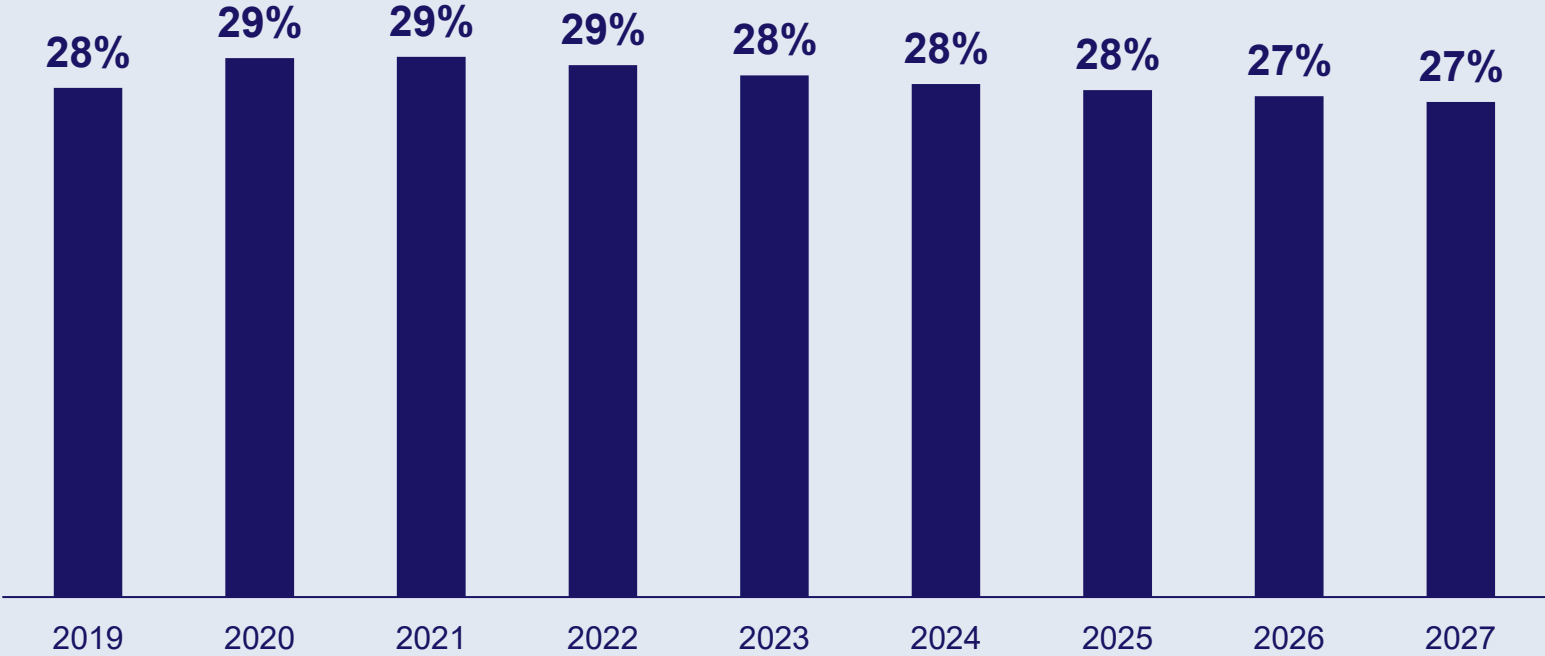
% of respondents



Source: VAB analysis of MRI-Simmons Fall 2014 – 2024 USA study, A18+. *VAB analysis of ARF DASH study, Spring 2024. Based on survey of 10,000 A18+. Q28: For what purposes do you regularly use tablet 1? 'Tablet 1' refers to respondents' primary tablet. Based on respondent weighting.

Gaming Consoles: Console gamers are projected to remain relatively consistent at just over one-quarter of the population

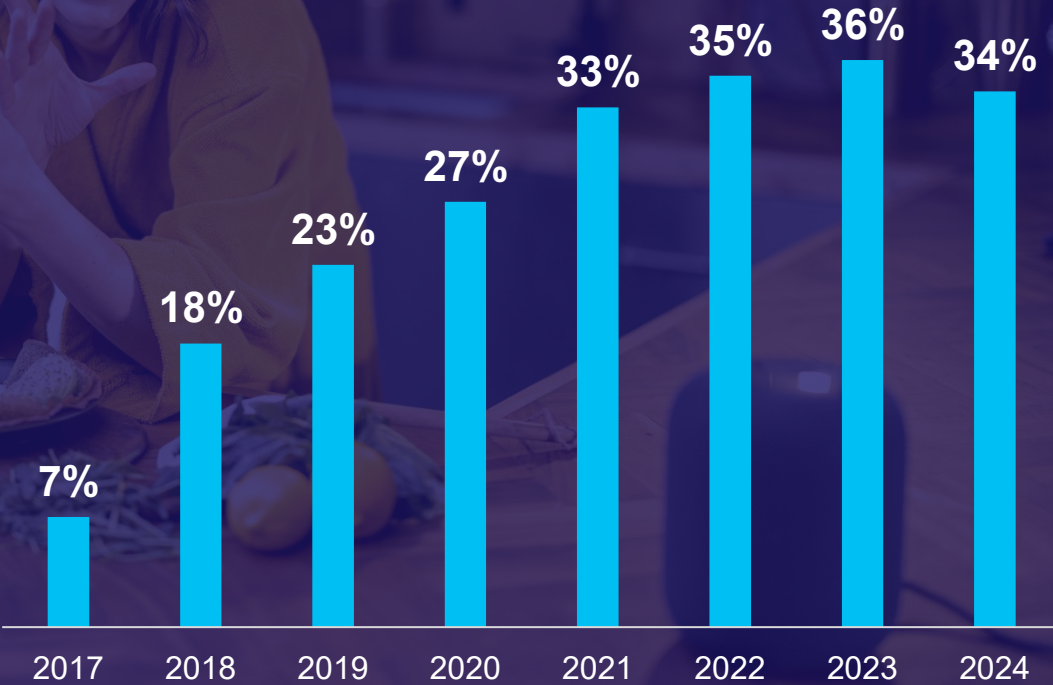
US Digital Console Gamers
% of population



Source: EMARKETER, Digital Console Gamers in the U.S., 2019-2027. Internet users of any age who play games through the internet or games that update via the internet at least once per month via a gaming console.

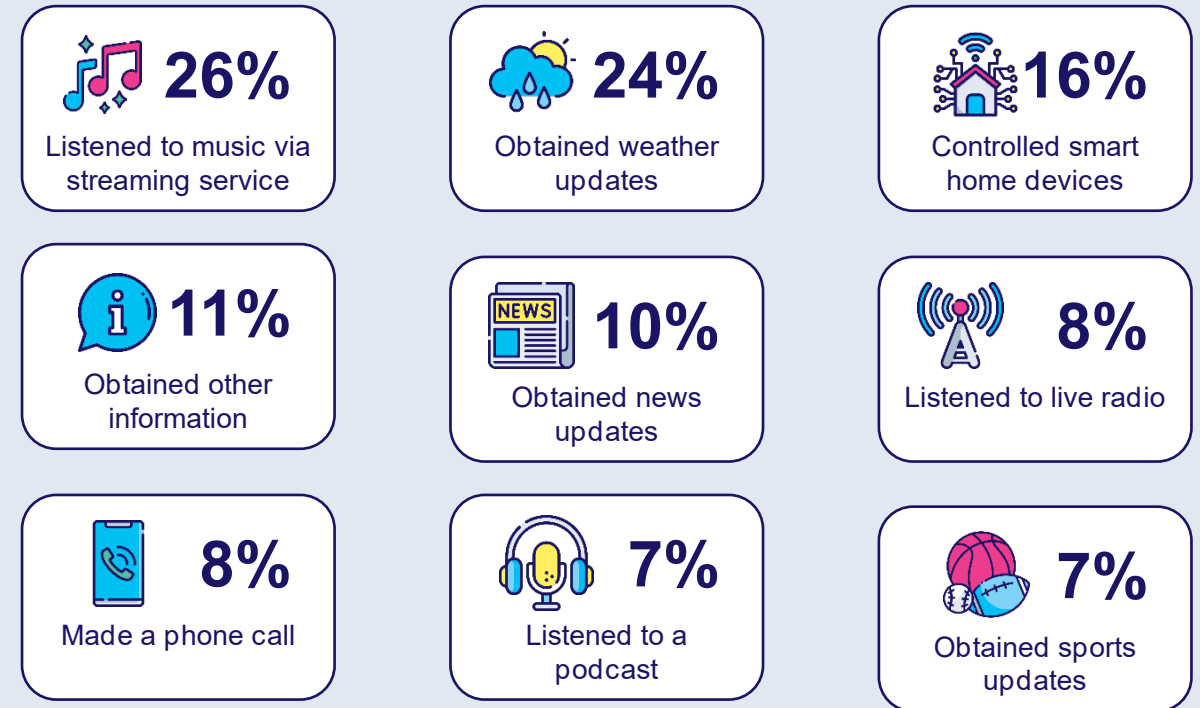
Smart Speakers: Device ownership has plateaued recently at around one-third of the population as users leverage them for specific core activities

% of U.S. 12+ population who own a smart speaker



Top Activities Done Using Smart Speaker*

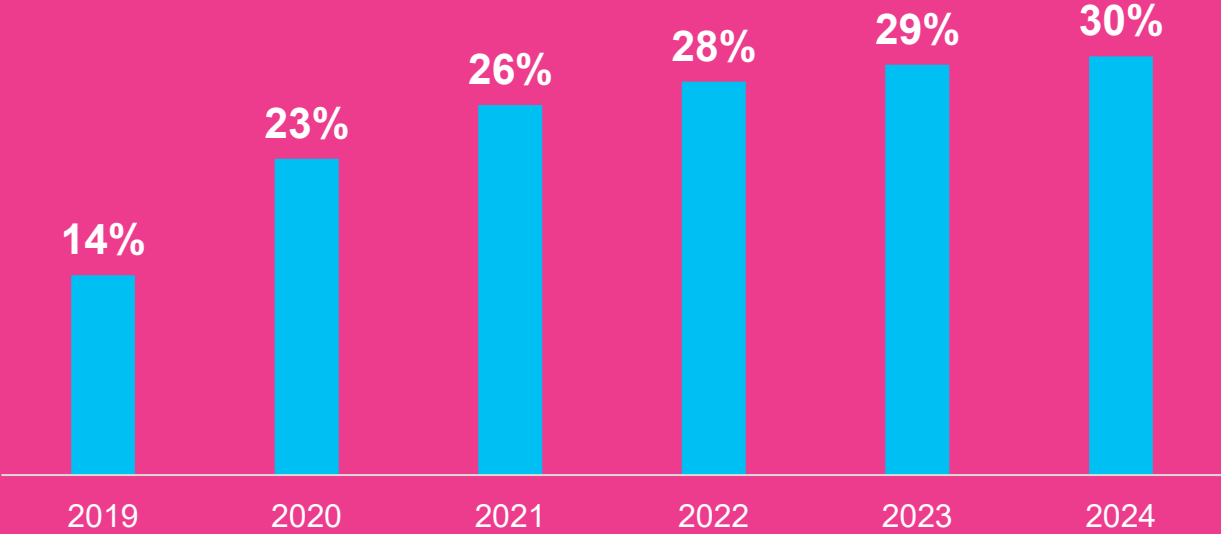
% of respondents



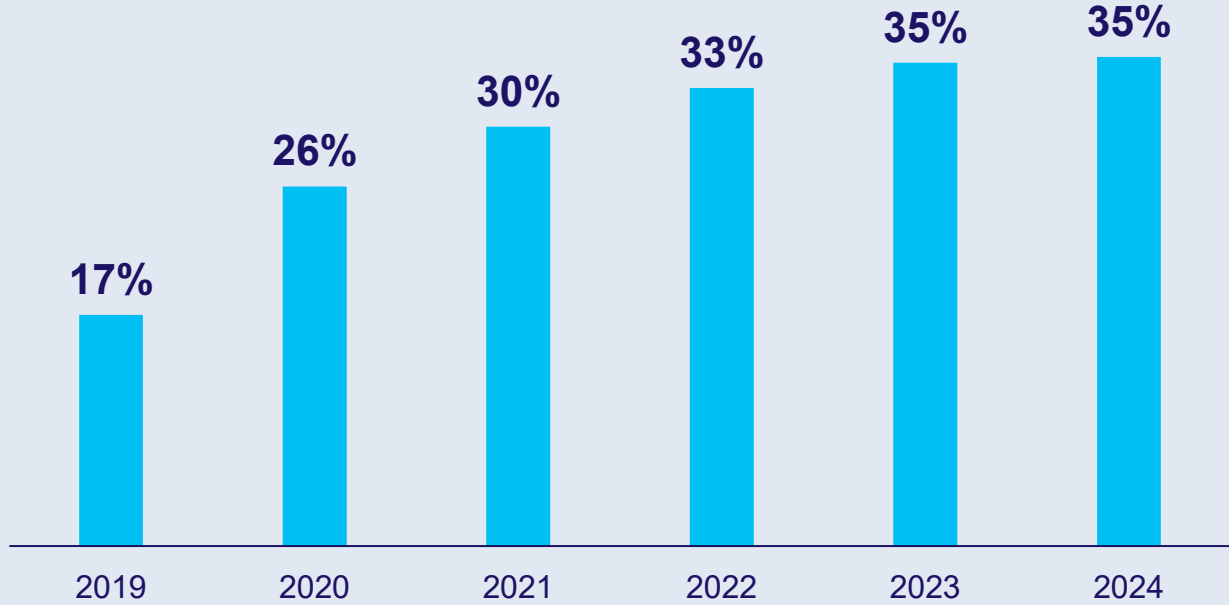
Source: Edison Research, *The Infinite Dial 2024*. *VAB analysis of MRI-Simmons Summer 2024 USA study, A18+. Other activities: 'Played a game' (5%); 'Purchased / ordered a product or service' (4%); 'Listened to an audiobook' (4%).

Smart Home Hubs: Nearly one-third of households have a hub, with a skew towards adults 35-54, as the velocity of growth has slowed recently

% of households that have smart home hubs connected to appliances in their home
A18+



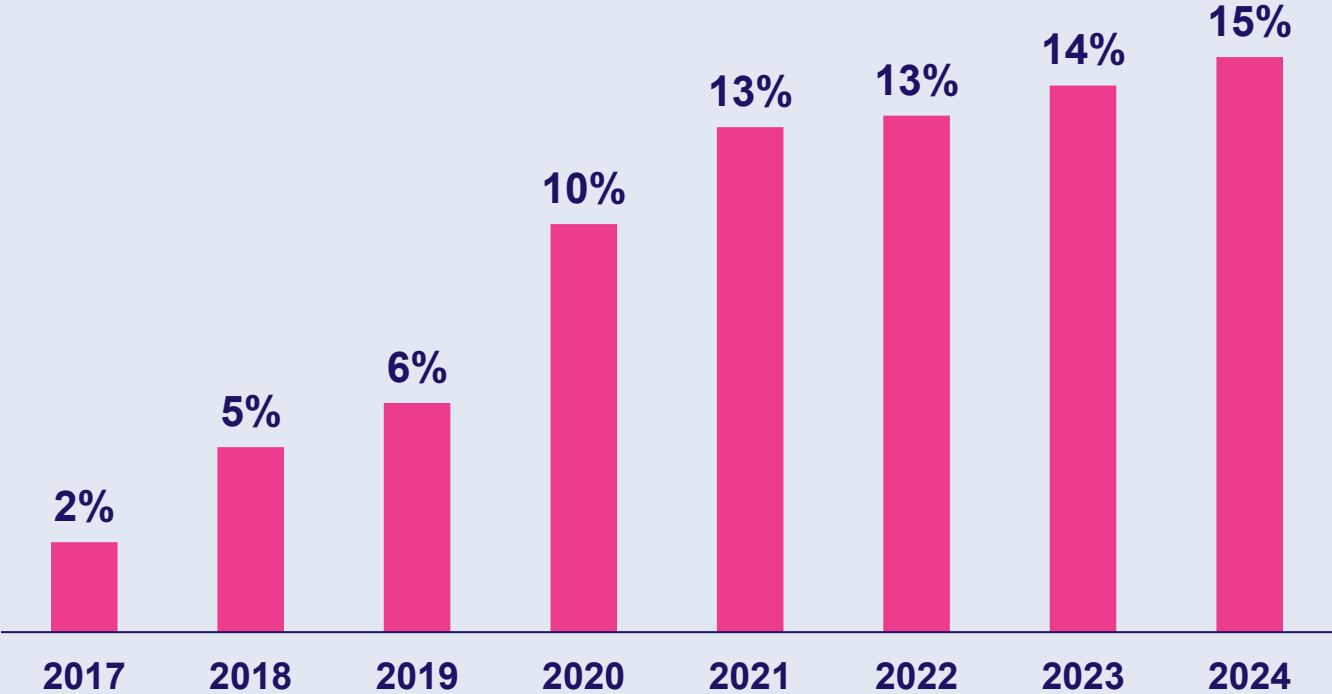
% of households that have smart home hubs connected to appliances in their home
A35-54



Source: VAB analysis of MRI-Simmons Fall 2019 -2024 study, A18+. Devices include: Audio system, Coffee maker, Dishwasher, Garage Door, Lighting, Oven, Refrigerator/Freezer, Security System, Thermostat, TV, Video Doorbell, Washer/Dryer, Other.

Smart Thermostats: Rising adoption of energy-saving smart technology highlights consumers' focus on cost efficiency and sustainable living

% of U.S. 18+ population who own a smart thermostat



Smart Thermostats can save individuals up to

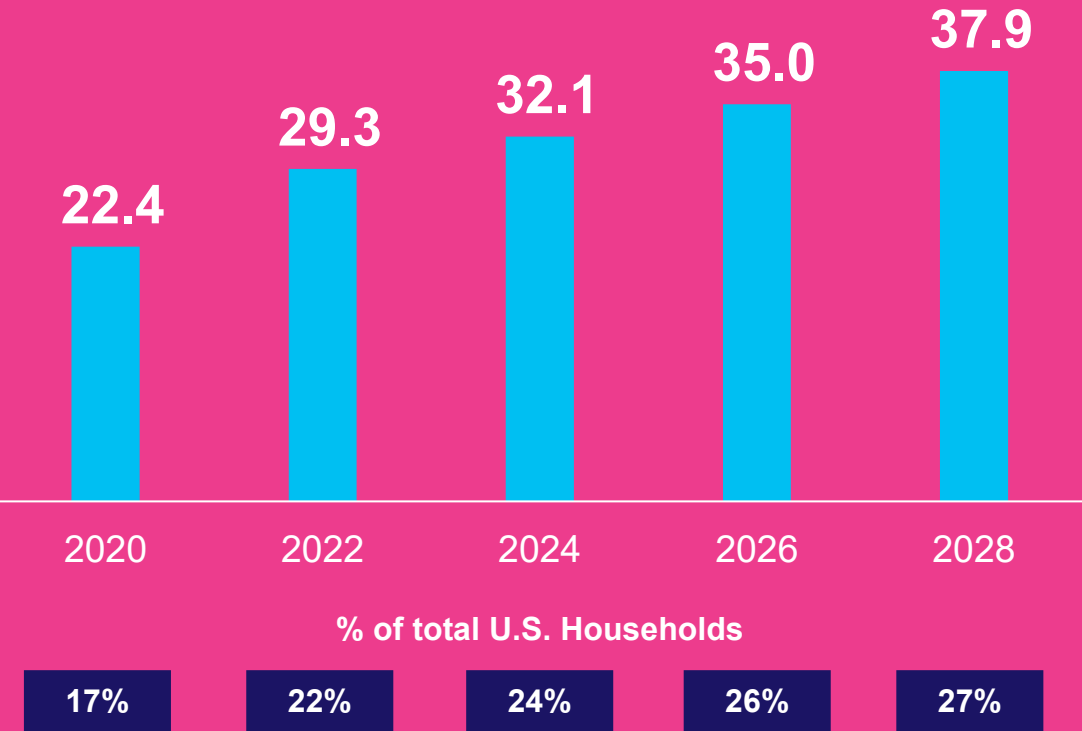
15%

On heating and cooling bills*

Source: VAB analysis of MRI-Simmons Fall 2017-2024 USA study, A18+. *Smart Energy (Smart Energy Consumer Collaborative), *Is a Smart Thermostat a Worthwhile Investment for Your Home?*

Smart Doorbells: With ownership now by over one-quarter of homes, a key benefit for users is feeling safer and less anxious about outside activities

Smart Home Doorbell Households*
In millions



% of respondents who agree with the following statements after installing a smart doorbell*

79%

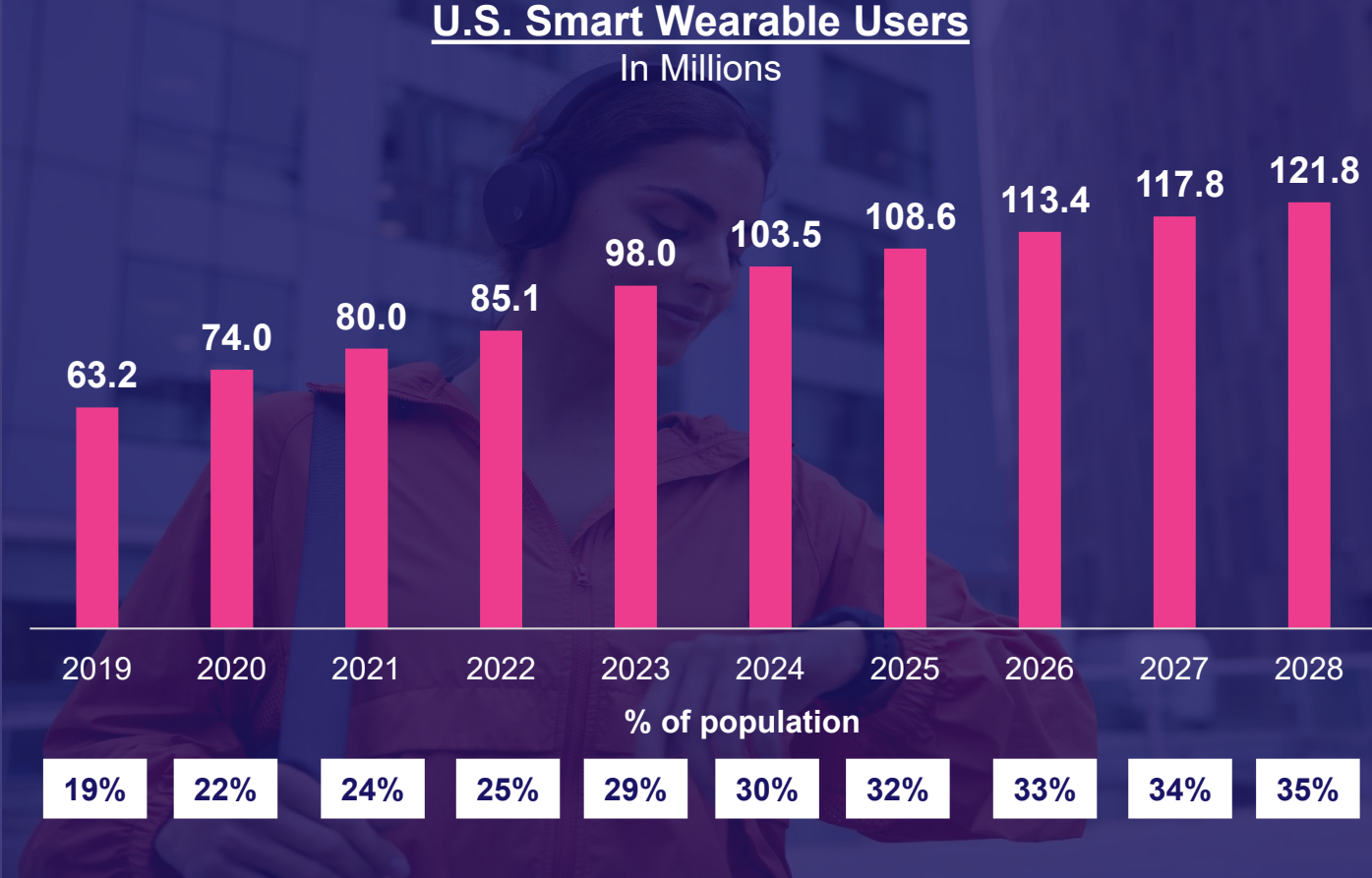
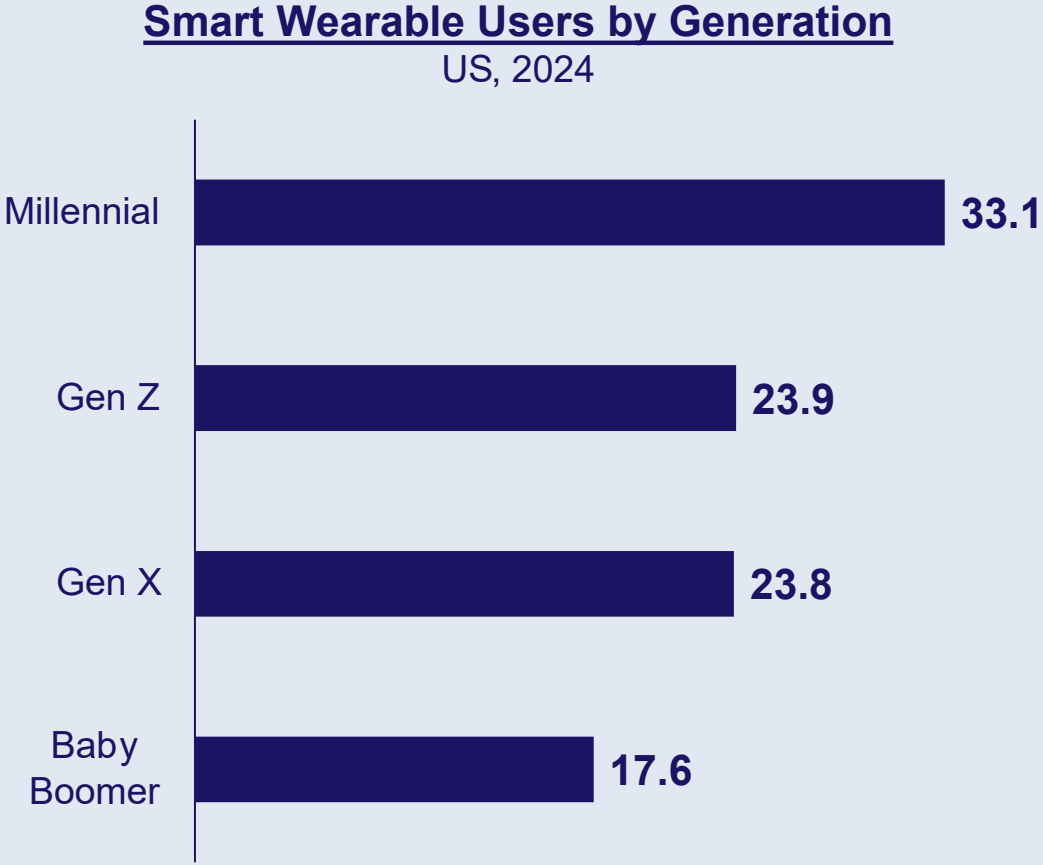
of people **felt more safe at home**

67%

of people **felt less anxious** about what goes on outside their home

Source: EMARKETER Forecast, August 2024. Note: Individuals of any age who actively use smart home doorbells in their own home at least once per month. Additional Note: A smart home doorbell is an interactive device that connects via internet and/or Bluetooth (or any other connectivity protocol) that can be controlled or automated by using apps, smart home hubs or voice assistants. It notifies the homeowner when a visitor is at the door and frequently has sensors and/or cameras. Examples include Arlo, Eufy, Google Nest, and Ring doorbells.
*Porch, *Smart Doorbell Suspicions: Exploring the Unintended Consequences of Smart Doorbells in Neighborhoods*.

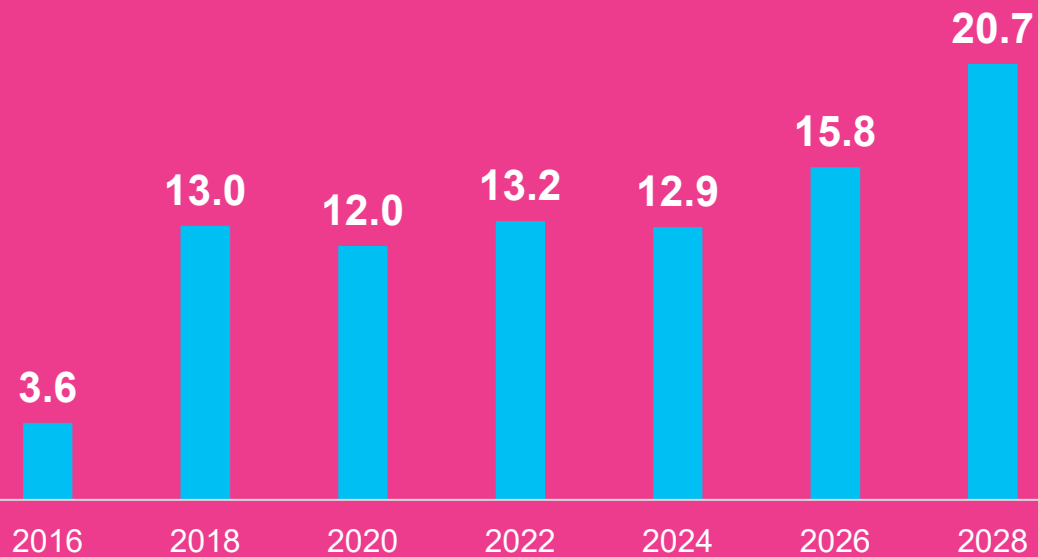
Wearables: Penetration has risen steadily, to almost 30% of the population, fueled by interest in health and fitness especially among younger demos



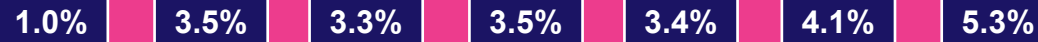
Source: EMARKETER, Smart Wearable Users, November 2024. Note: Individuals of any age who at least once per month wear accessories or clothing that have the ability to connect to the internet (via built-in connectivity or tethering), which in turn collects and exchanges data with a manufacturer, operator, or other connected device; must have features that can be used without being tethered to a smartphone, PC, or other internet-connected device; excludes medical devices and VR headsets. Smart wearables include items embedded with electronics, software, or sensors, such as activity trackers, smart bands, smart clothing, smart glasses, smart headphones, and smartwatches.

AR/VR Headsets: After some fluctuation, adoption is projected to grow as consumers look to balance affordability, performance and user comfort

Augmented and Virtual Reality Headset Installed Base
In millions

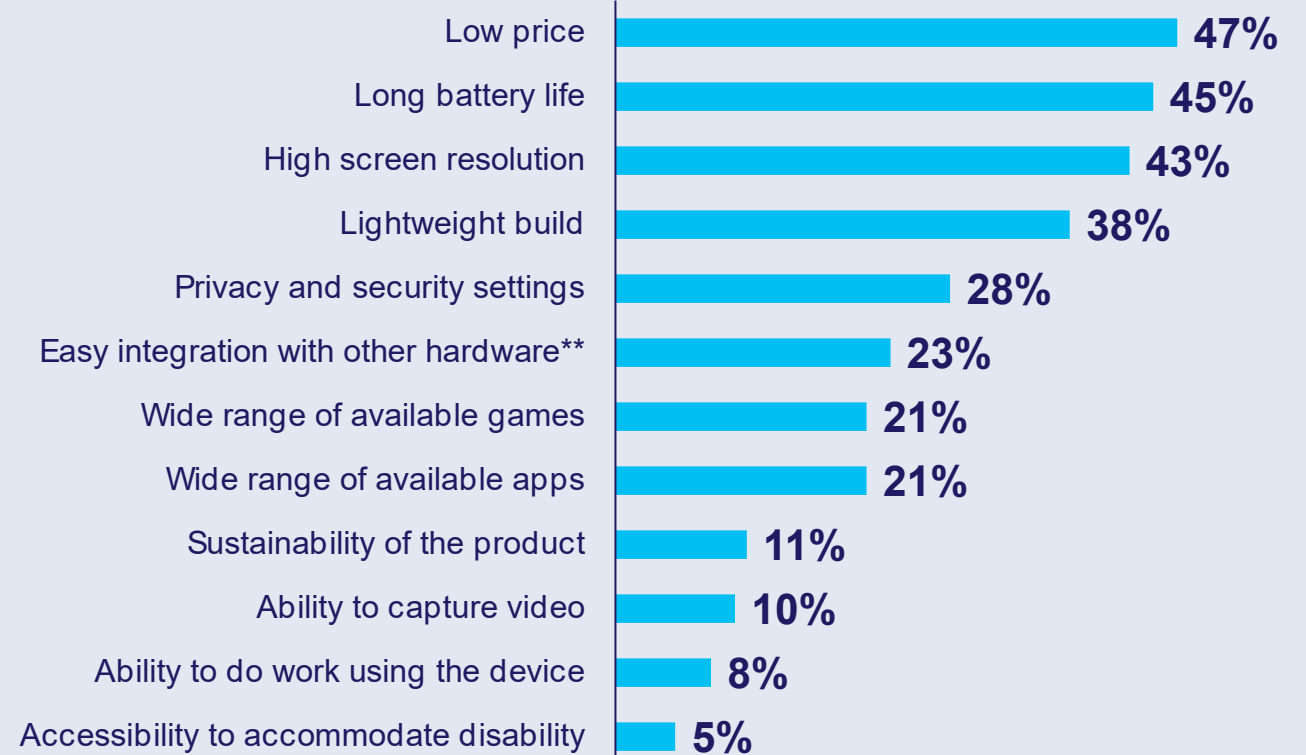


Estimated % of North America population*



Features That Are Most Important in a VR Headset**

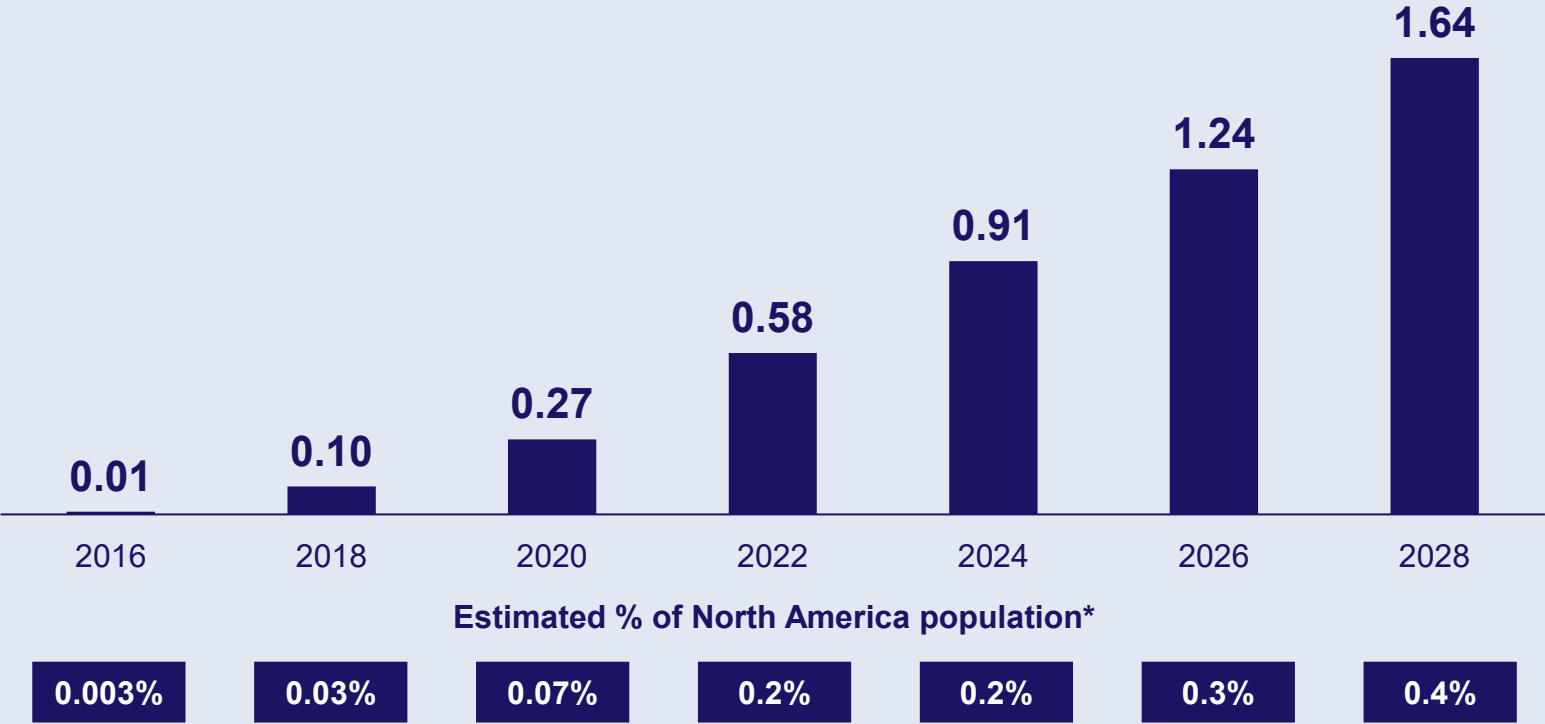
% of respondents



Source: S&P Global Market Intelligence Kagan estimates; industry data. Data compiled May 2024. Based on figures for North America. 'Installed Base' refers to the total number of units of a product currently in use by customers. *S&P Global, North America Population (U.S. & Canada.). **YouGov as cited in company blog, January 19, 2024. Note: ages 18+; top 5 responses. Other responses: 'Not sure' (23%), 'None of the above' (13%). ** (e.g., mobile phones, tablets, watches & computers). Compound Annual Growth Rate (CAGR): 15.6%.

Smart Glasses: The rise of smart glasses signals a shift toward more immersive, tech-driven experiences

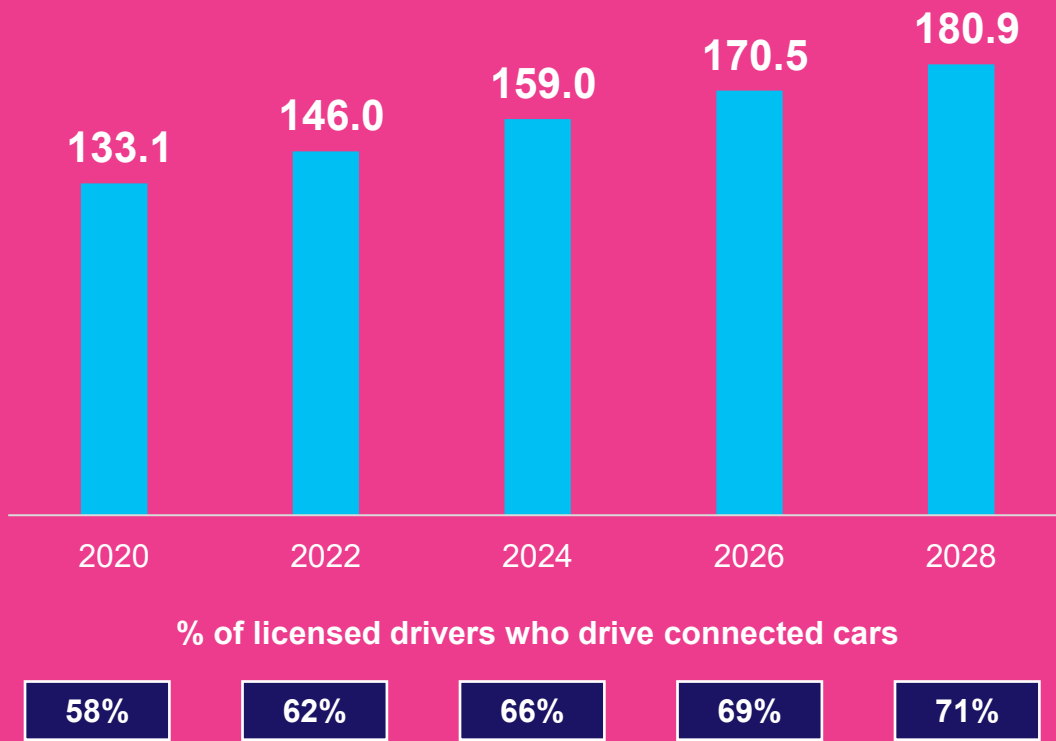
Total Augmented / Virtual Reality Smart Glasses Installed Base
In millions



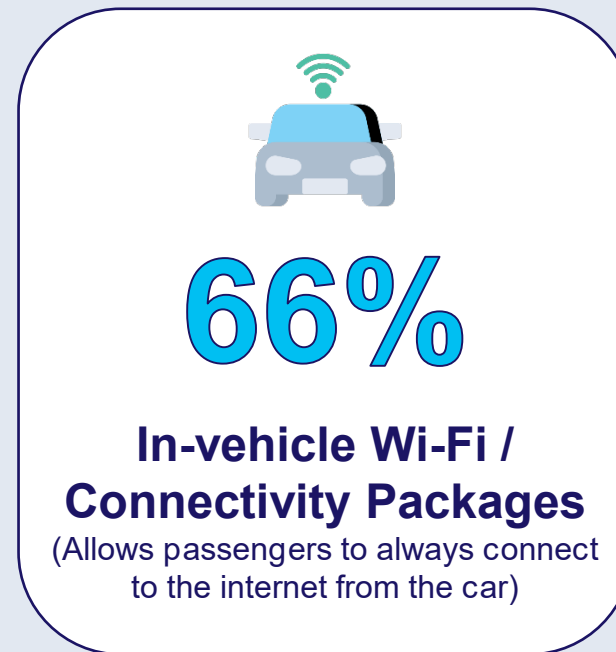
Source: S&P Global Market Intelligence Kagan estimates; industry data. Data compiled May 2024. Based on figures for North America. 'Installed Base' refers to the total number of units of a product currently in use by customers. Compound Annual Growth Rate (CAGR): 25.3%. *S&P Global, North America Population (U.S. & Canada).

Connected Cars: Two-thirds of drivers use connected cars and nearly half of all adults are willing to pay for an in-vehicle entertainment system

U.S. Connected Car Drivers
In millions



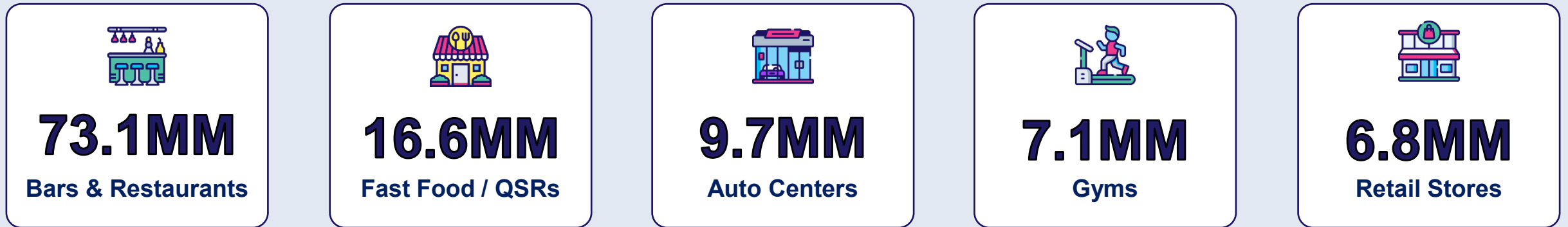
Monthly automotive subscription features
U.S. adults are willing to pay for*
% of respondents



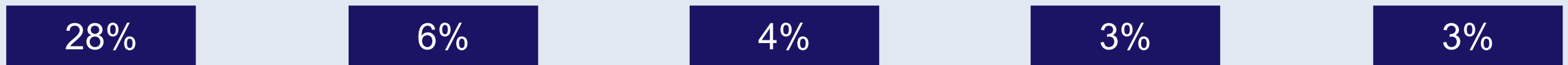
Source: EMARKETER Forecast, September 2024. Note: ages 14+; licensed drivers who have driven a connected car and accessed its internet-enabled features at least once during the calendar year. *KPMG, KPMG American Perspectives Survey, May 30, 2024. Note: ages 18+. Reflects respondents who would be 'very likely' or 'somewhat' likely to pay for monthly automotive subscription features. Other features: 'Safety features like blind spot monitoring, lane keep assist, automatic braking, etc.' (71%); 'Remote start from your phone' (60%); 'Charging station locator, with real-time information on availability and pricing' (61%); 'Software service and updates without going to dealership' (59%); 'Parking locator, with real-time information on availability and pricing' (53%); 'Performance features like extra horsepower' (52%); 'Hands-free and self-driving capabilities' (43%).

Place-Based Video Screens: Opportunities are growing to incrementally reach and engage consumers across locations outside the home

Place-Based Digital Video Viewing* A18+ Monthly Reach



% Reach Among A18+*



Source: Atmosphere TV, The People Platform; Reach based on one view with Atmosphere TV content/ads; Period: April 2024. *VAB analysis of reach based on Nielsen 2024 National Universe Estimates.

Other Emerging Connected Screens: Travel is evolving as contact points for connected technology through airplane and rideshare screens



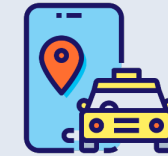
Screens on Airplanes

United Airlines is leveraging **100K seatback screens** to deliver opt-out targeted ads, a decision that could catch on with other airlines



6/7/2024

United Airlines starts serving passengers personalized ads on seat-back screens



Rideshare / Taxi Screens

Screens in taxis, rideshare vehicles & rideshare apps offer opportunities for advertising

Nationwide Rideshare Campaign Case Study

An audiobook brand worked with [T-Advertising Solutions](#) to develop an interactive video ad that played snippets of select audiobooks, providing audiences with an engaging audio and visual sample of story content **across 70K screens***

5.5M+ Impressions

Over **20,000** hours of
airtime for the creative

2x Industry average
click-through rate

Drove **58k+** unique
clicks to the brands
landing page

Source: United Airlines Press Release, 6/7/2024. *T-Advertising Solutions, Case Study: Driving subscriptions with an interactive Rideshare campaign.

Key Marketer Takeaways

- ▶ The world is only becoming more ‘connected’ which has led to an explosion of smart devices across most categories – some of these devices are well-established having been in-market for years (such as connected TVs, smartphones and computers) while others are exciting, emerging technologies that are beginning to build traction within the minds of consumers
- ▶ The growth of connected devices creates more occasions and increased opportunities for brands to engage with their best customer prospects in more meaningful and personalized ways
- ▶ Since many connected devices are at various life stages and penetration levels, marketers can employ different buying strategies to engage consumers by device including considering ‘test and learn’ tactics with the emerging technologies that are just beginning to show signs of growth

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Staying Current on Streaming
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Shortening the Path to Purchase
How New Opportunities in Shoppable TV Are Igniting Viewer Engagement and Brand Performance



Recipe for Success
Six Key Ingredients for Stirring Growth in Streaming



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Embracing Innovation Through the Exploration of Modern Ad Solutions



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