



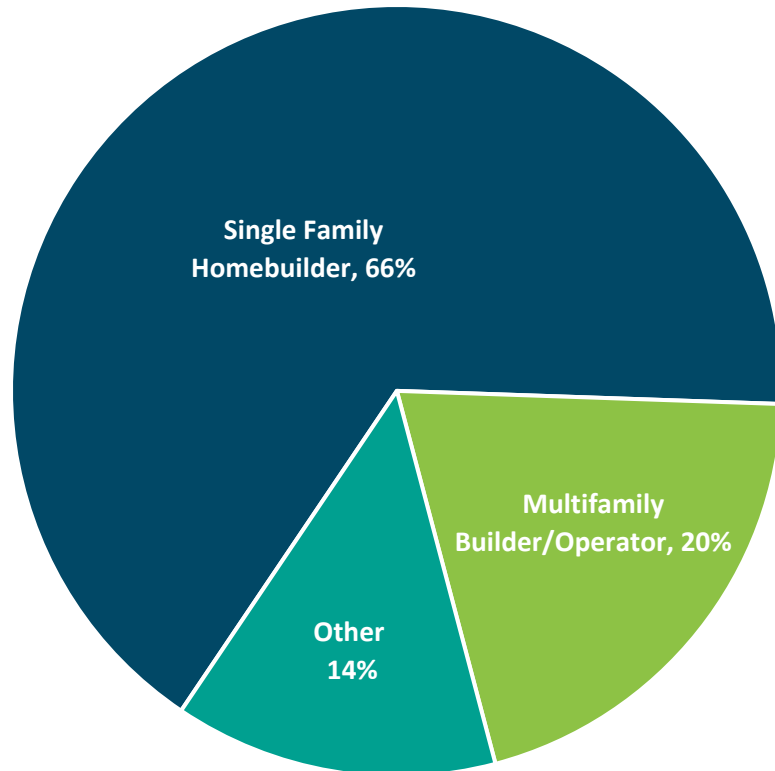
2020 Re-Vision Survey Report

Survey Purpose & Method

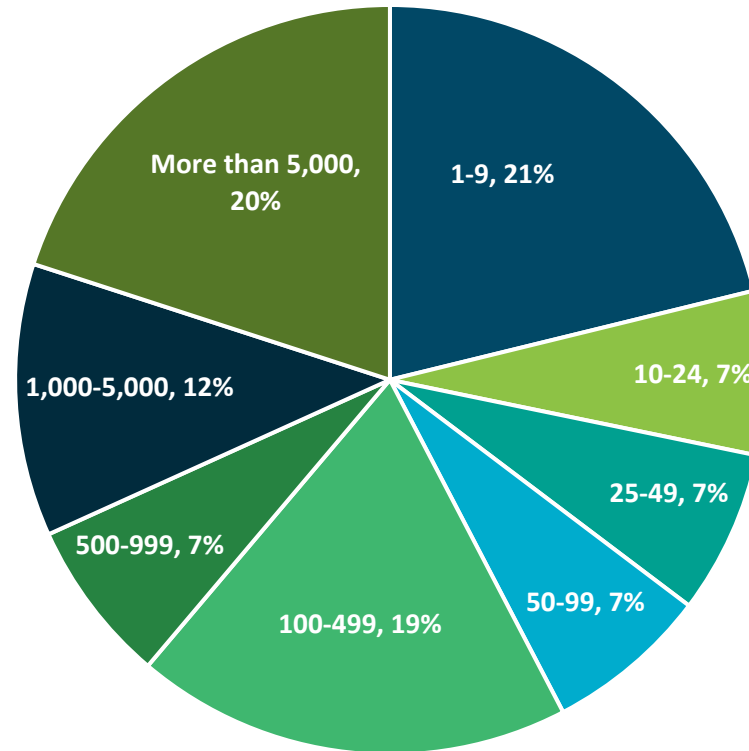
- The COVID-19 pandemic is driving dramatic changes in go-to-market strategies among tech and housing industry players and in the demand for specific installed tech applications.
- This survey of vendors, integrators/subcontractors and builders/multifamily operators seeks to map some of the most significant changes.
- Survey sent to AE industry databases and customers using three survey separate questionnaires. Both online and phone interviews used.
- Survey responses: 407
 - Builders/multifamily operators: 165
 - Integrators/subcontractors: 133
 - Tech vendors (manufacturers, distributors, reps.): 109

Builder/Multifamily Operator Respondent Profile

PRIMARY BUSINESS



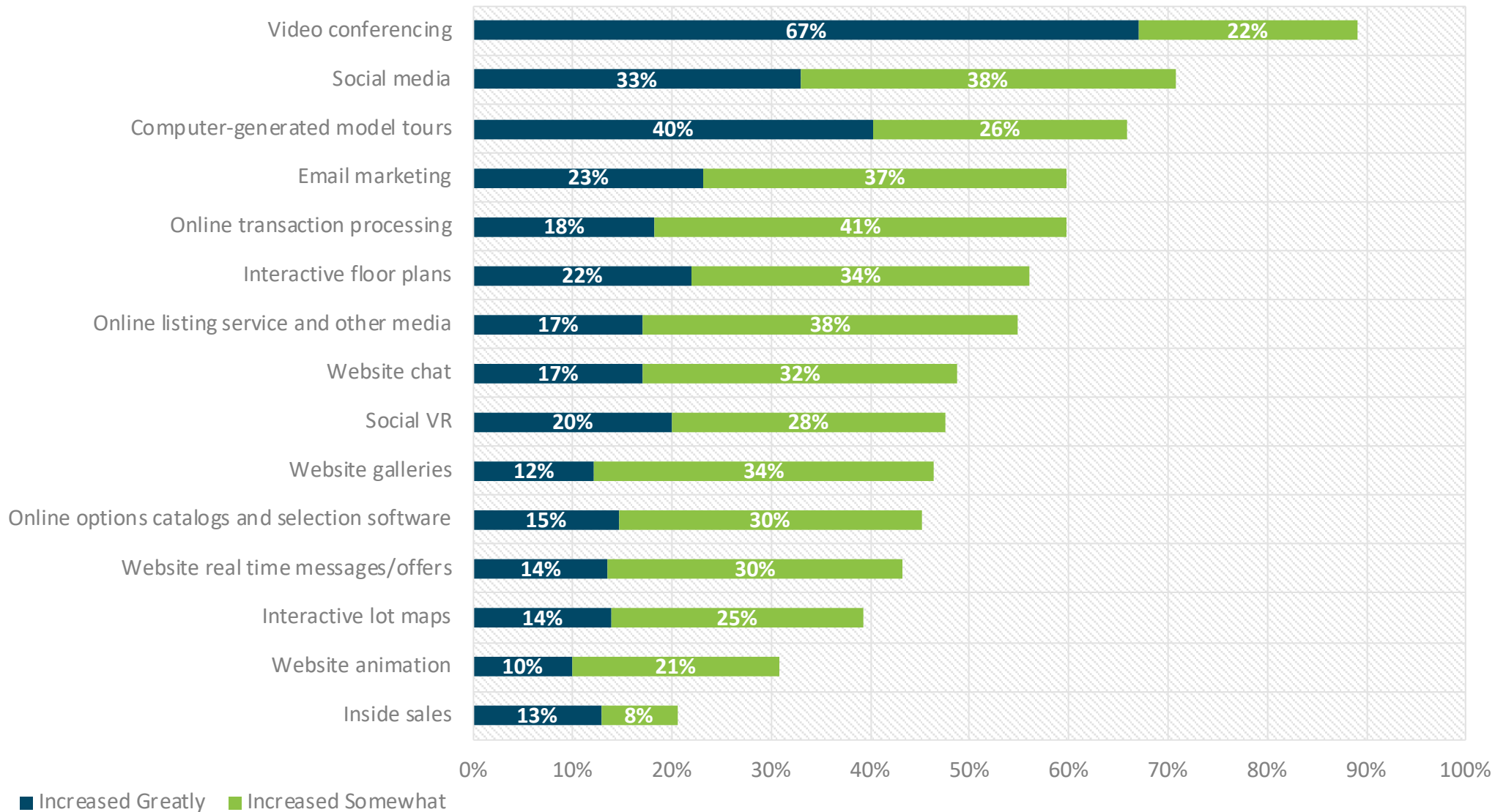
NUMBER OF HOMES/UNITS BUILT/MANAGED IN 2020



ANALYSIS

Most respondents to this edition of the survey were single-family builders. The sample skews to larger builders with 58% of the sample building or operating 100 or more units annually.

Builder/Multifamily Operator Marketing & Sales Assets & Tactics



ANALYSIS

Limitations on in-person contact are driving builders and multifamily operators to strengthen use of digital marketing and sales tactics.

Builder Digital Sales & Marketing Cornerstones

Based 2020 Re-Vision data points and conversations with industry players, TecHome Builder has identified **4 cornerstones of builder digital sales and marketing** moving forward.

With less homebuyers on the road shopping physically, builders are shifting traffic generating investments from billboards to digital equivalents like social and email marketing and online listings, then they are working hard to engage the shoppers/buyers that arrive at their site with richer and more interactive visual and video media. Video conferencing is a way to enliven remote selling and get human sellers connected with buyers despite distances.

In the longer term, we see dollars shifting away from physical sales assets like models and design centers to a complete online homebuying experience where a buyer can fully outfit the home from lot and model to the full suite of options and the builder can take orders of personalized, optimized, finished homes!

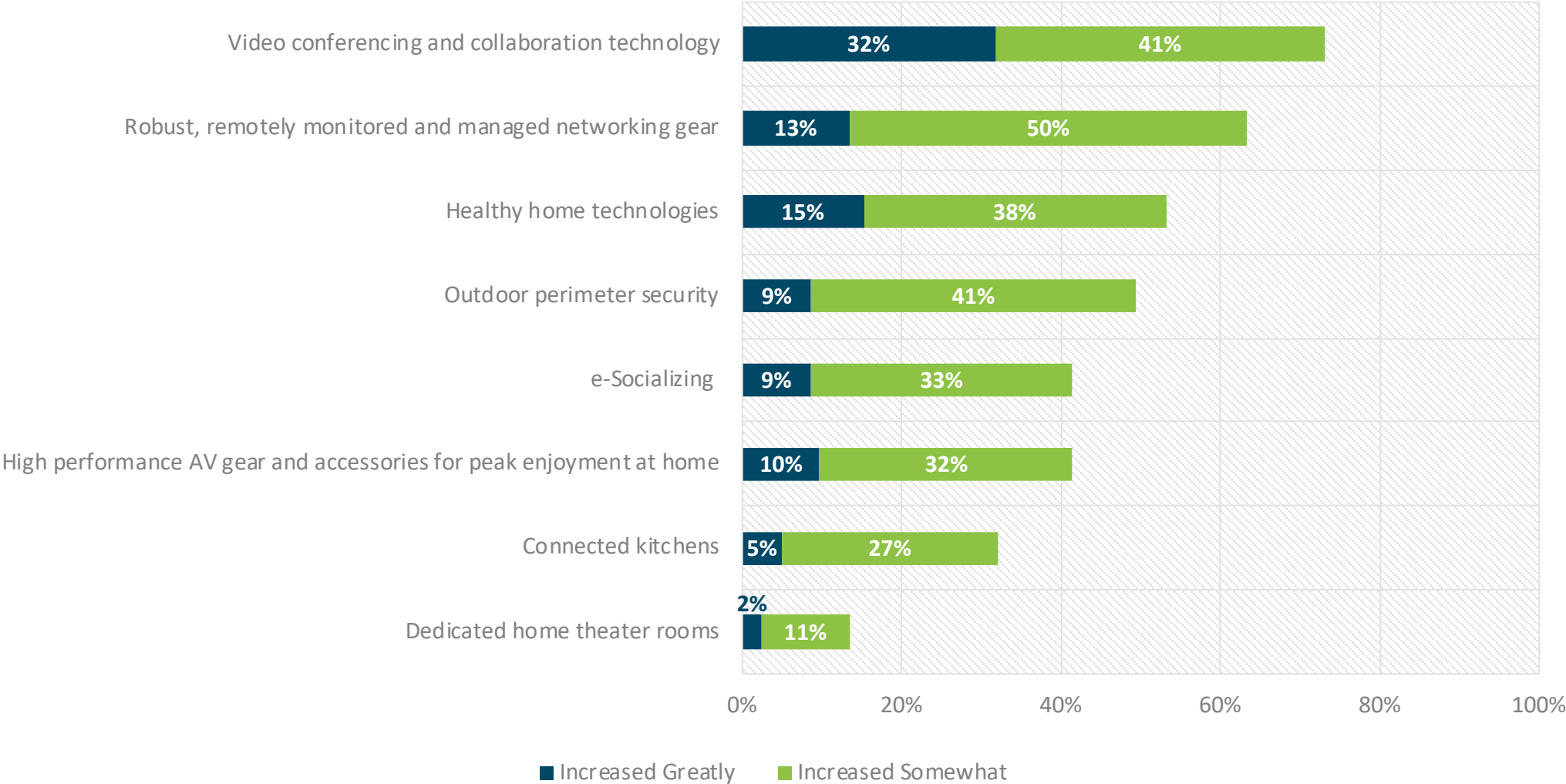
LEAD GEN:
Email, Social,
Listings

WEB EXPERIENCE:
Enhanced Home
Visualization/Tour
Virtualization

**VIDEO
CONFERENCING:**
Remote
Personalized Sales
and Touring

**LONG TERM
COMPLETE
ONLINE BUYING:**
Lot + Home +
Options

Builder/Multifamily Operators on Applications/Products



ANALYSIS
Builders see video conferencing and collaboration technologies for work and learn from home on the rise along with healthy home, security and AV.

2020 RE-VISION BIG 4 HOME TECH APPLICATIONS

We've identified Big 4 emerging home tech applications in the wake of the pandemic:

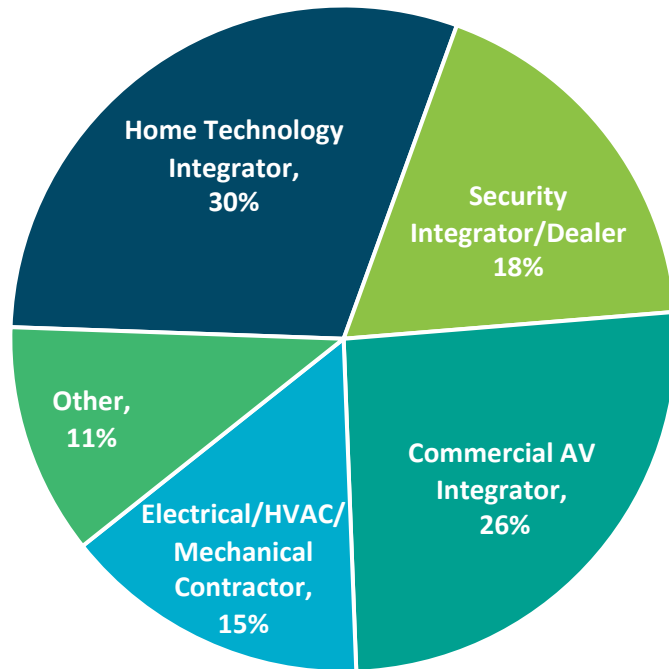
- Work/learn from home
- Play-at-home
- Safe-at-home
- Healthy home.

Builders and their tech vendor and subcontractor partners who move quickly to develop integrated offers in these areas will boost the appeal of new homes, position themselves to win in a competitive and dynamic market and realize significant revenue and profit opportunities.



Integrator/Subcontractor Respondent Profile

PRIMARY BUSINESS



Number of Residential Installations in 2020

None	27%
1-9	8%
10-24	5%
25-49	11%
50-99	12%
100-499	19%
500-999	10%
1,000-5,000	8%
More than 5,000	1%

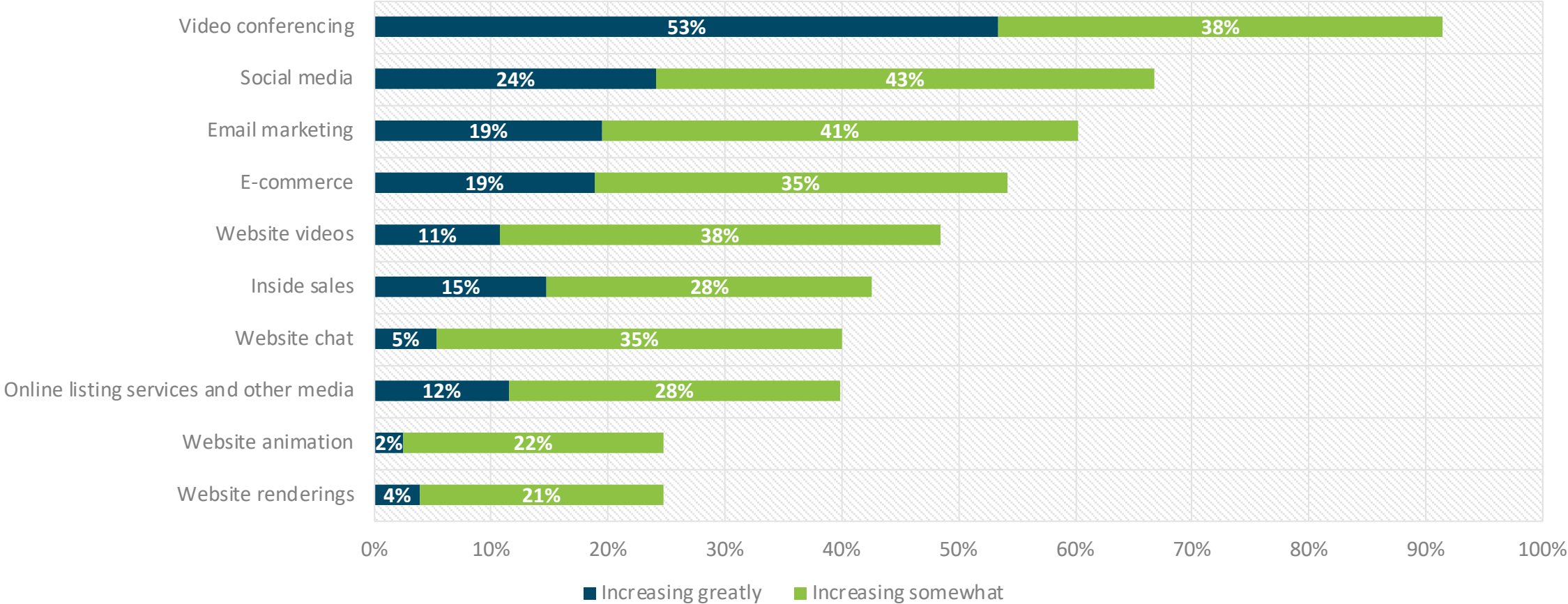
Number of Commercial Installations in 2020

None	8%
1-9	18%
10-24	14%
25-49	11%
50-99	19%
100-499	22%
500-999	4%
1,000-5,000	3%
More than 5,000	2%

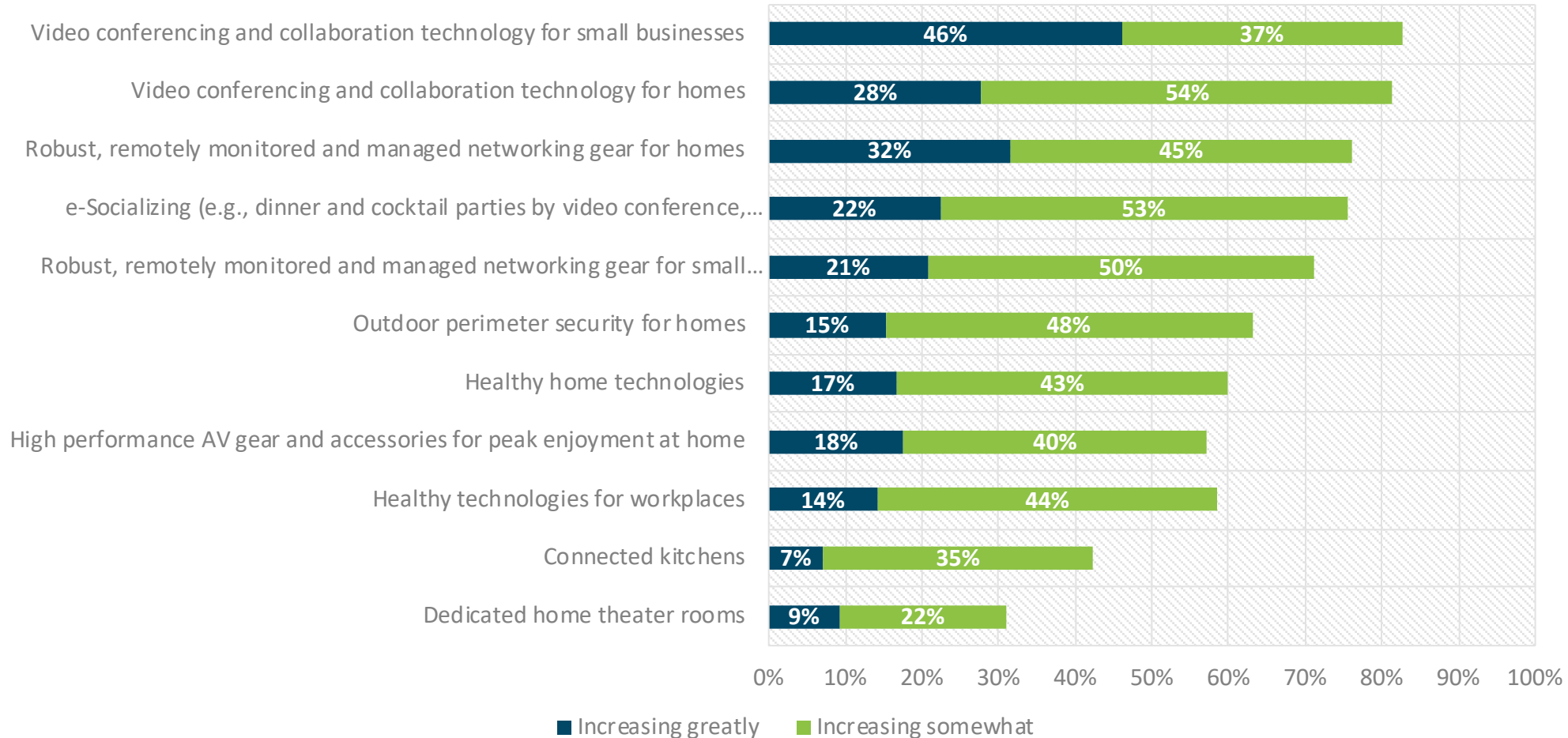
ANALYSIS

A broad cross section of integrator/subcontractor companies responded to the 2020 Re-Vision Survey, with companies of sizes representative of the market as a whole.

Integrator Marketing & Sales Assets & Tactics



Integrators on Applications/Products

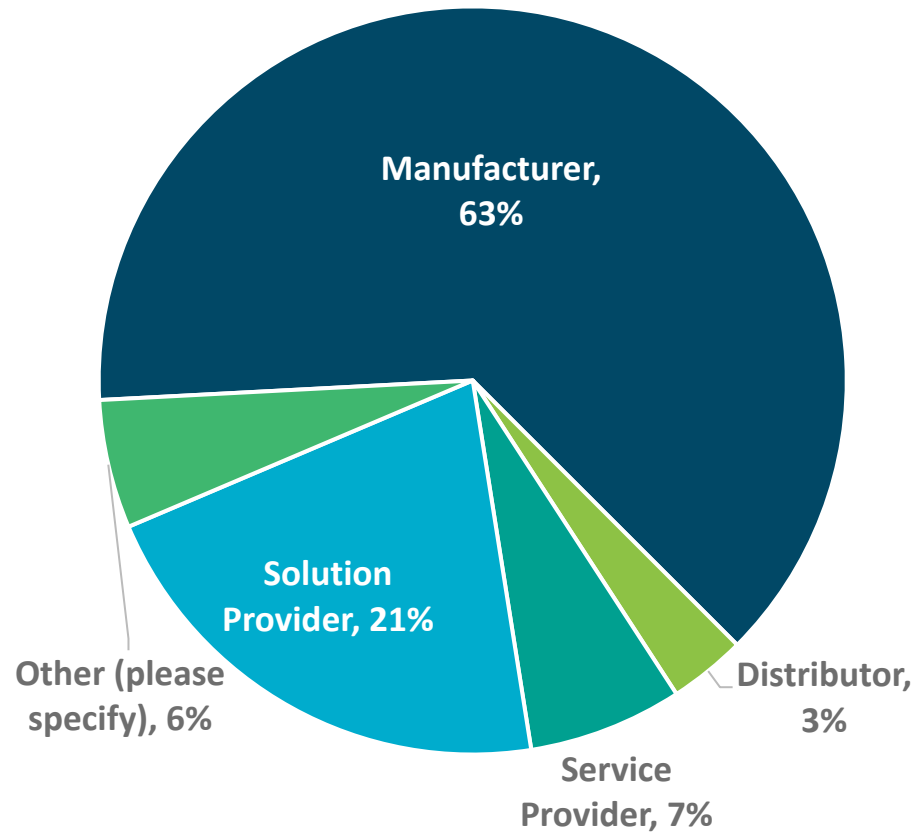


ANALYSIS

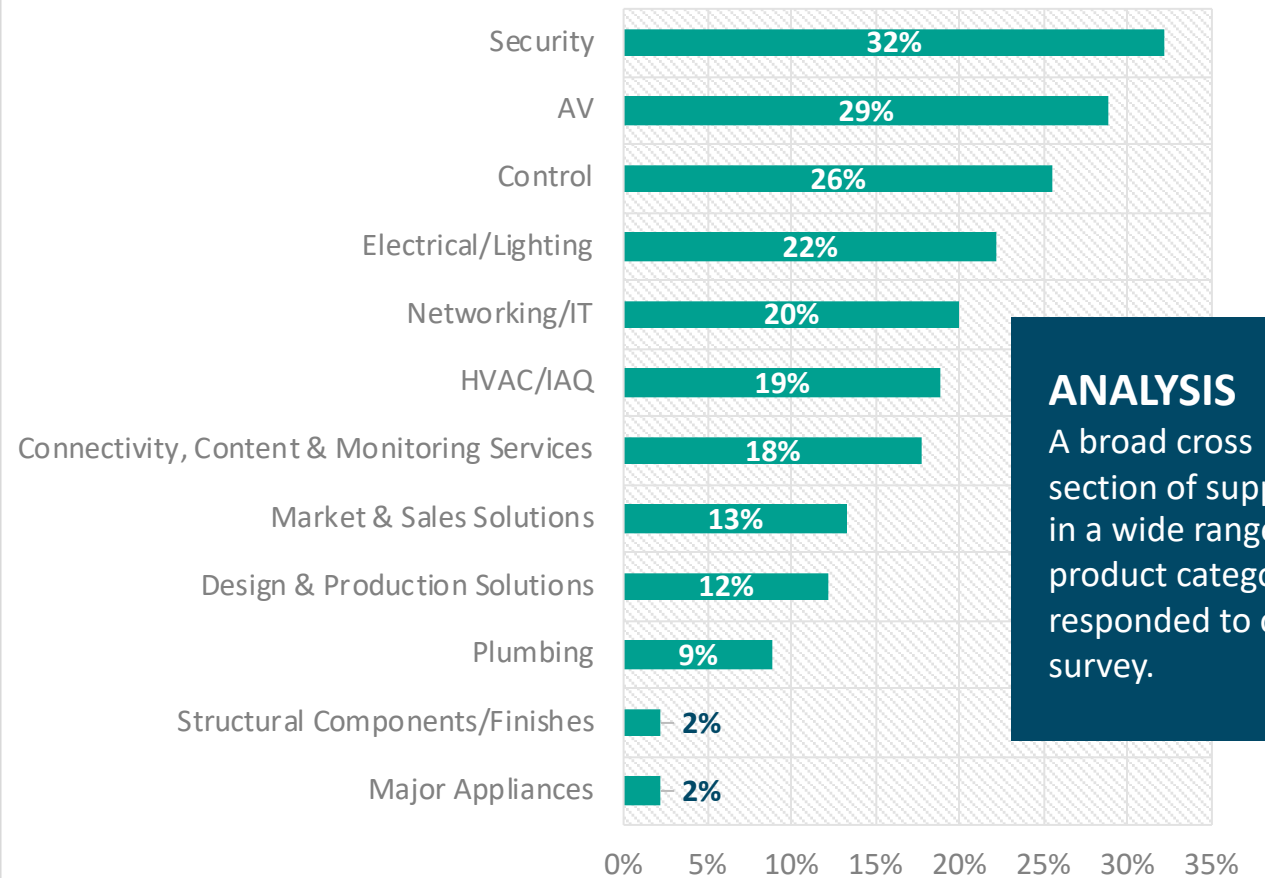
Integrators all see growth in categories that fall into our Big 4 Home Tech analysis along with opportunities for conferencing and collaboration tech, security and healthy tech in offices as well.

Vendor Respondent Profile

PRIMARY BUSINESS



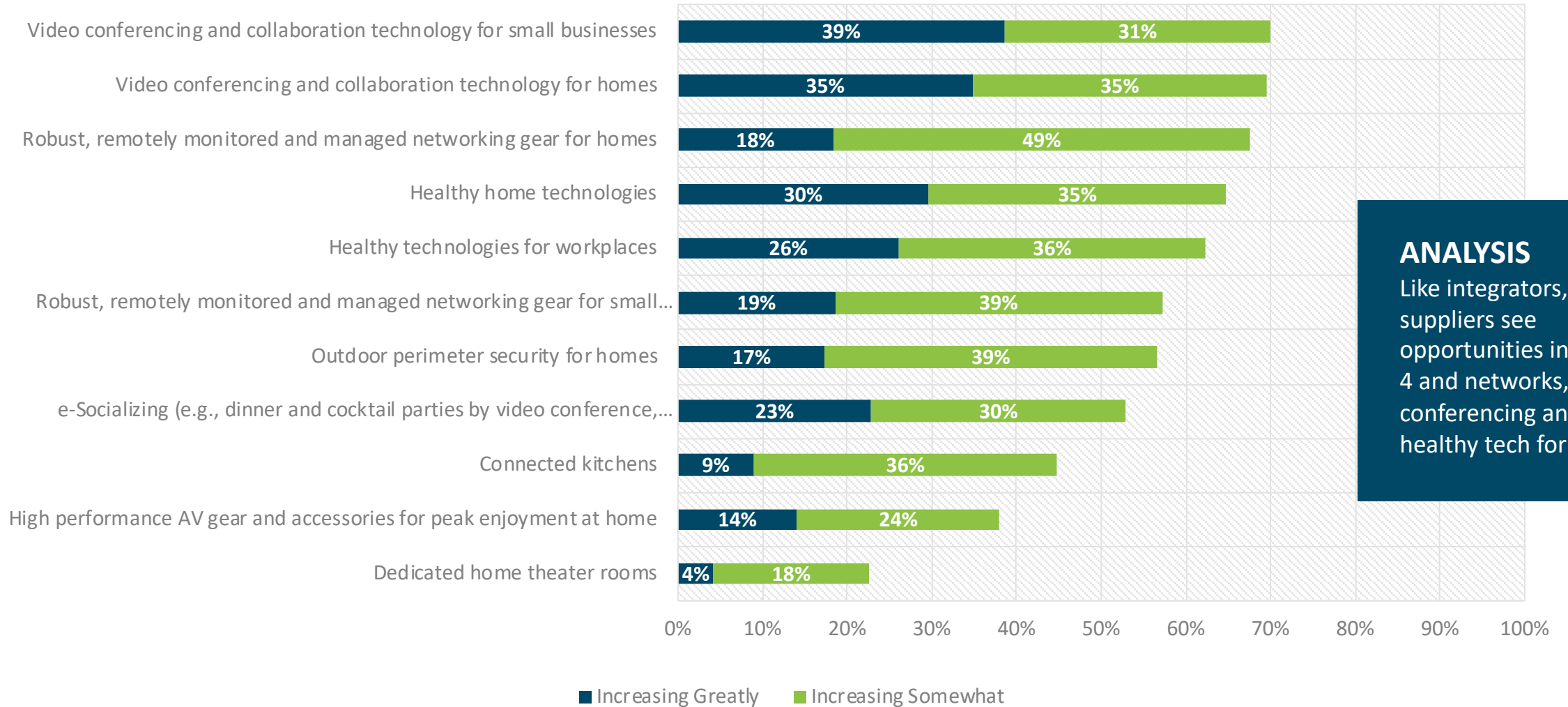
PRODUCT CATEGORIES



ANALYSIS

A broad cross section of suppliers in a wide range of product categories responded to our survey.

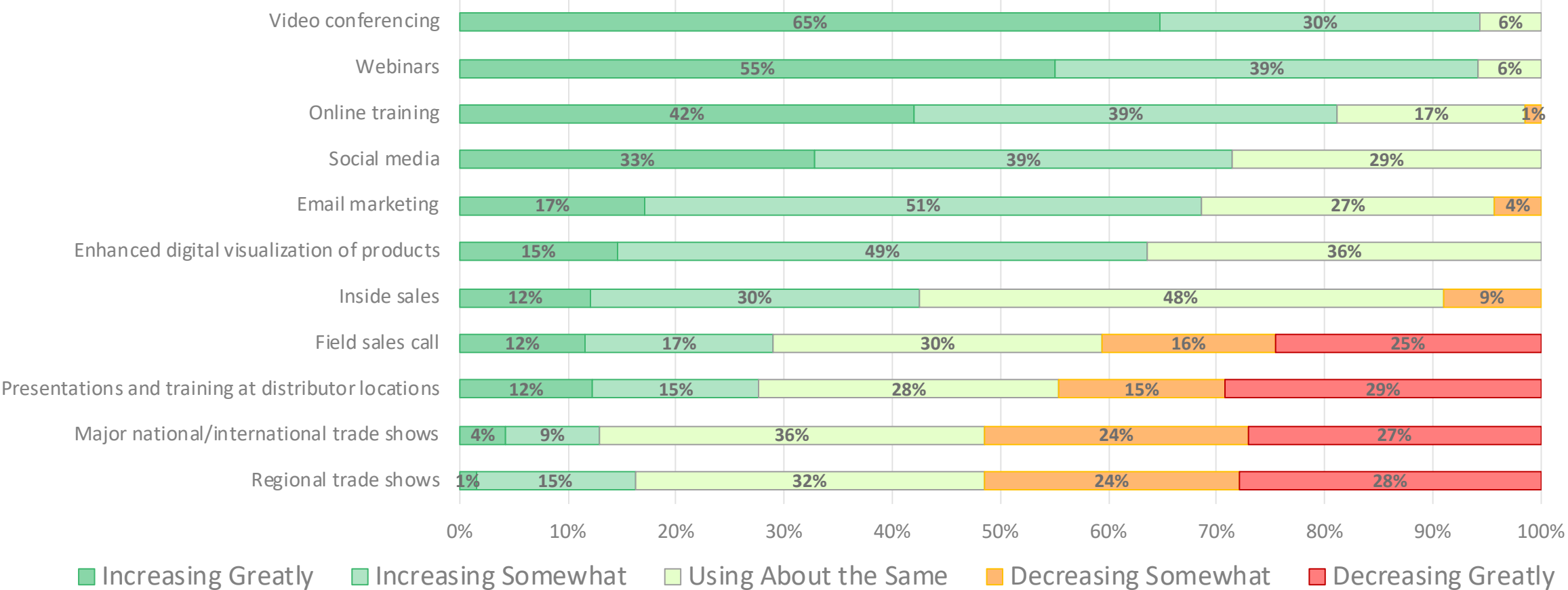
Tech Vendors on Applications/Products



ANALYSIS

Like integrators, suppliers see opportunities in the Big 4 and networks, conferencing and healthy tech for offices.

Tech Vendor Marketing & Sales Assets & Tactics



ANALYSIS

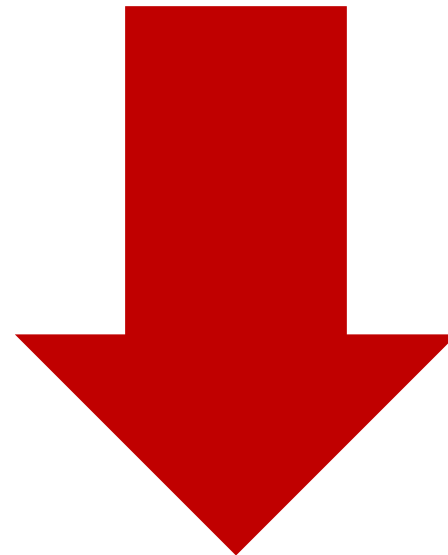
Video conferencing technology is on the rise for tech supplier sales and marketing efforts along with digital marketing and inside/digital selling.

Trade-show style events are decreasing dramatically along with field sales and field training and presentations at distributor locations.

Tech Vendors
Changing Market Mix



Video Conferencing
Digital Marketing
Inside Digital Sales



Big Tradeshows
Field Sales
Field Training at
Distributors

Questions?

Contact:

John Galante, President, AE Ventures

508-618-4226 | jgalante@ae-ventures.com

