

THE CURRENT STATE OF THE SMART HOME A SURVEY BY BOSCH & TWITTER

What do consumers think about the smart home?

Survey overview

In cooperation with Twitter, Bosch has asked consumers about their opinion on the smart home – just in time for IFA in Berlin.

How much do they know, what is convincing about the technology? And what's holding them back from connecting their own home?

The results from the surveyed Twitter users are representative for six countries.

Survey design:

- ▶ Survey period: July 26 to August 3, 2016
- ▶ 6.265 surveyed Twitter users from:
 - ▶ Germany (1.250)
 - ▶ Austria (495)
 - ▶ France (1.049)
 - ▶ Spain (1.130)
 - ▶ United Kingdom (1.182)
 - ▶ USA (1.159)

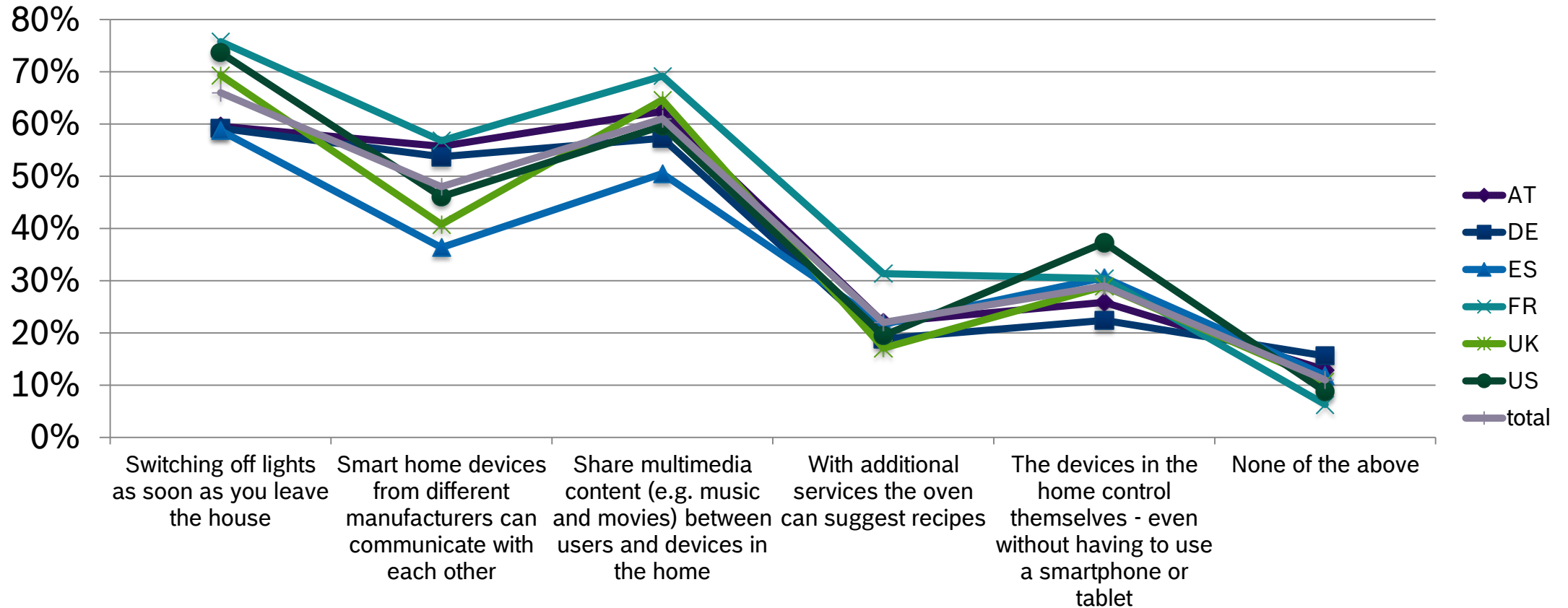
KNOWN CAPABILITIES OF THE SMART HOME

What do you think a connected home can already do today?

Overview

- ▶ Many Twitter users are not yet aware of what a connected home is already capable of doing.
- ▶ While two thirds of the respondents know that the smart home can turn the lights off automatically when they leave the house, only 22 percent can imagine that the oven can already suggest the perfect recipes.
- ▶ By country comparison, Twitter users from France are most confident of what a smart home can do. Spaniards and Germans are the least confident.

We're interested in your opinion on Smart Homes: What do you think a connected home can already do today?



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	AT	DE	ES	FR	UK	US	Total
Switching off lights as soon as you leave the house	60%	59%	59%	76%	69%	74%	66%
Smart home devices from different manufacturers can communicate with each other	56%	54%	36%	57%	41%	46%	48%
Share multimedia content (e.g. music and movies) between users and devices in the home	62%	57%	51%	69%	65%	60%	61%
With additional services the oven can suggest recipes	22%	19%	22%	31%	17%	19%	22%
The devices in the home control themselves - even without having to use a smartphone or tablet	26%	22%	31%	30%	29%	37%	29%
None of the above	13%	16%	12%	6%	11%	9%	11%

HOW THE SMART HOME CONVINCES CONSUMERS

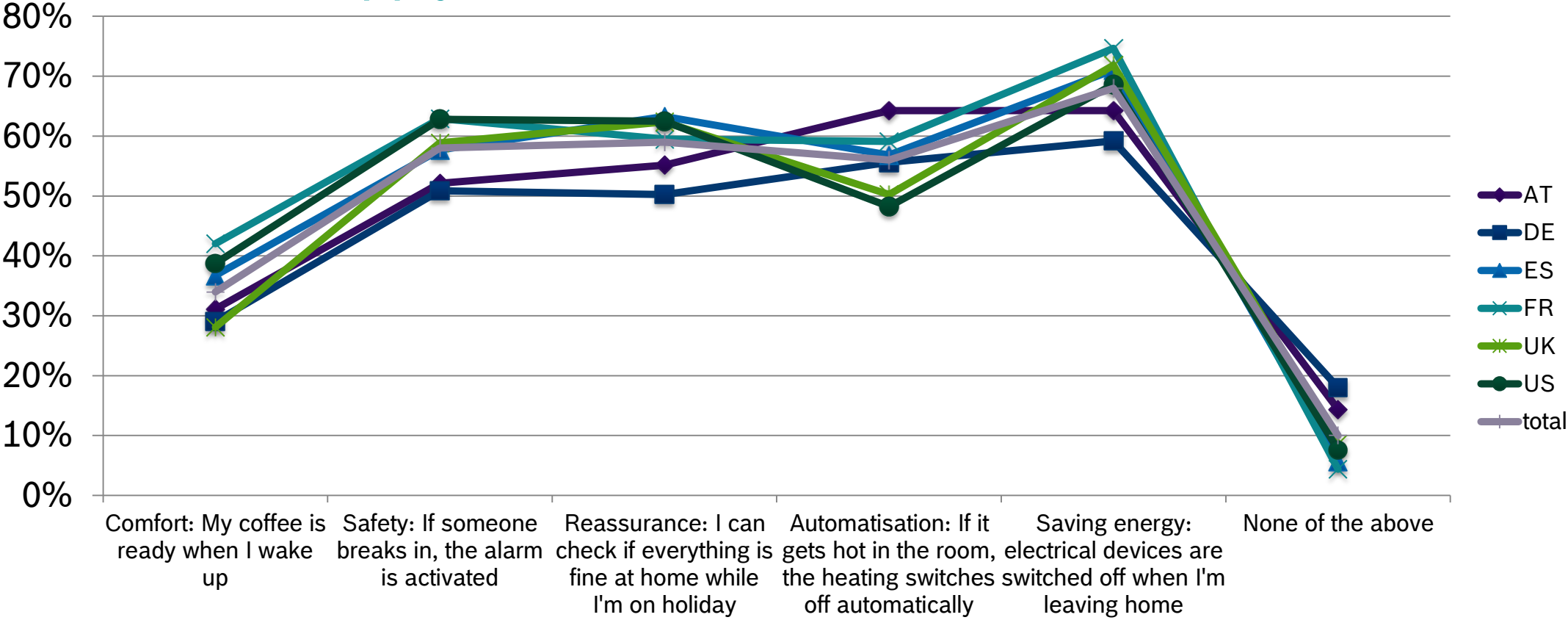
Which aspect of living in a Smart Home is most appealing to you?

Overview

- ▶ Saving energy is the most important selling point worldwide: 69 percent of the surveyed said to find this convincing. The Spanish, French and English, in particular, seem to be very interested in saving money (71 to 75 percent).
- ▶ Reassurance and security come in second and third place in total as arguments (59 and 58 percent)
- ▶ About a third of those surveyed find more comfort to be convincing (34 percent).

Which aspect of living in a Smart Home is most appealing to you?

(select all that apply)



Which aspect of living in a Smart Home is most appealing to you? (select all that apply)

	AT	DE	ES	FR	UK	US	Total
Comfort: My coffee is ready when I wake up	31%	29%	37%	42%	28%	39%	34%
Safety: If someone breaks in, the alarm is activated	52%	51%	58%	63%	59%	63%	58%
Reassurance: I can check if everything is fine at home while I'm on holiday	55%	50%	63%	59%	62%	62%	59%
Automatisation: If it gets hot in the room, the heating switches off automatically	64%	56%	57%	59%	50%	48%	56%
Saving energy: electrical devices are switched off when I'm leaving home	64%	59%	71%	75%	72%	69%	68%
None of the above	14%	18%	6%	4%	9%	8%	10%

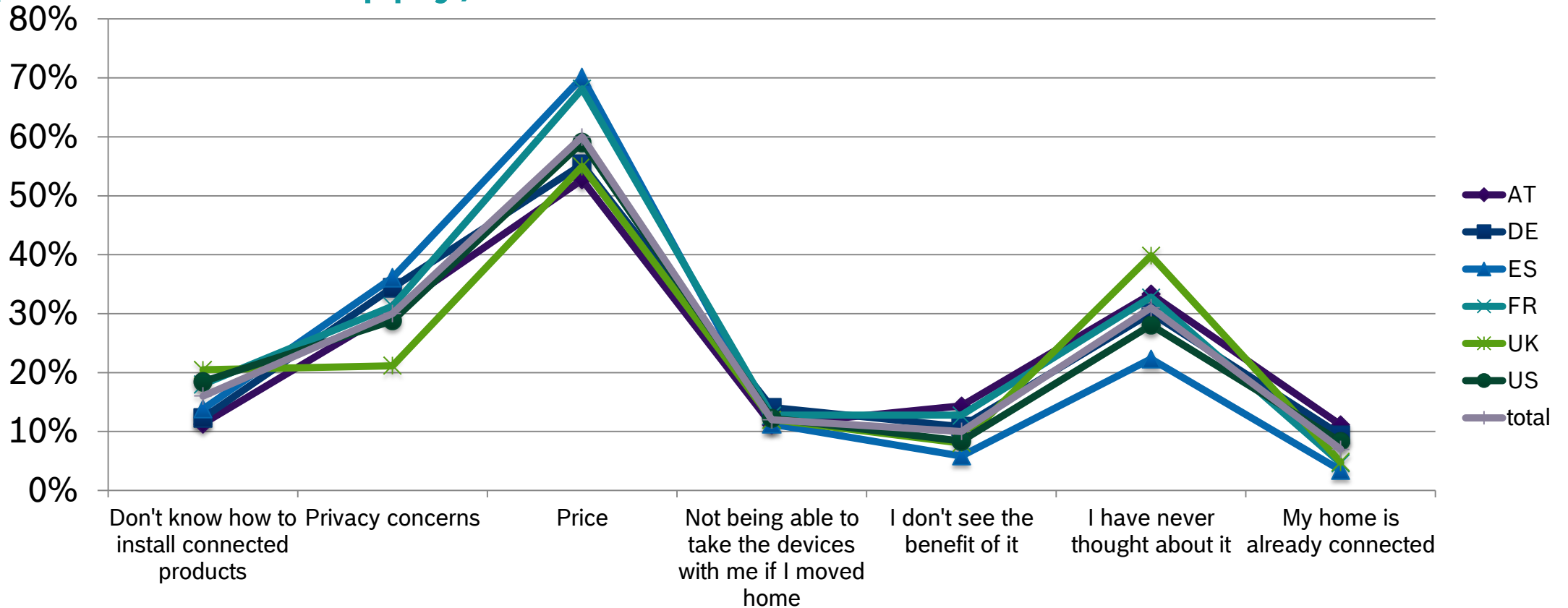
CONCERNS ABOUT THE SMART HOME

What's holding you back from connecting your home into a Smart Home?

Overview

- ▶ More than half of those surveyed suspect high initial costs (60 percent).
- ▶ 30 percent are concerned about privacy.
- ▶ However, about as many have never even thought about a connected home before (31 percent).
- ▶ At least 7 percent already live in a connected home or plan to do so. In Germany and Austria, it's even one in ten.

What's holding you back from connecting your home into a Smart Home? (select all that apply)



What's holding you back from connecting your home into a Smart Home? (select all that apply)

	AT	DE	ES	FR	UK	US	Total
Don't know how to install connected products	11%	12%	14%	18%	20%	18%	16%
Privacy concerns	31%	34%	36%	31%	21%	29%	30%
Price	53%	55%	70%	68%	55%	59%	60%
Not being able to take the devices with me if I moved home	11%	14%	11%	13%	12%	12%	12%
I don't see the benefit of it	14%	11%	6%	13%	8%	8%	10%
I have never thought about it	33%	30%	22%	33%	40%	28%	31%
My home is already connected	11%	9%	3%	5%	5%	8%	7%

HIGH-DEMAND SCENARIOS FOR THE SMART HOME

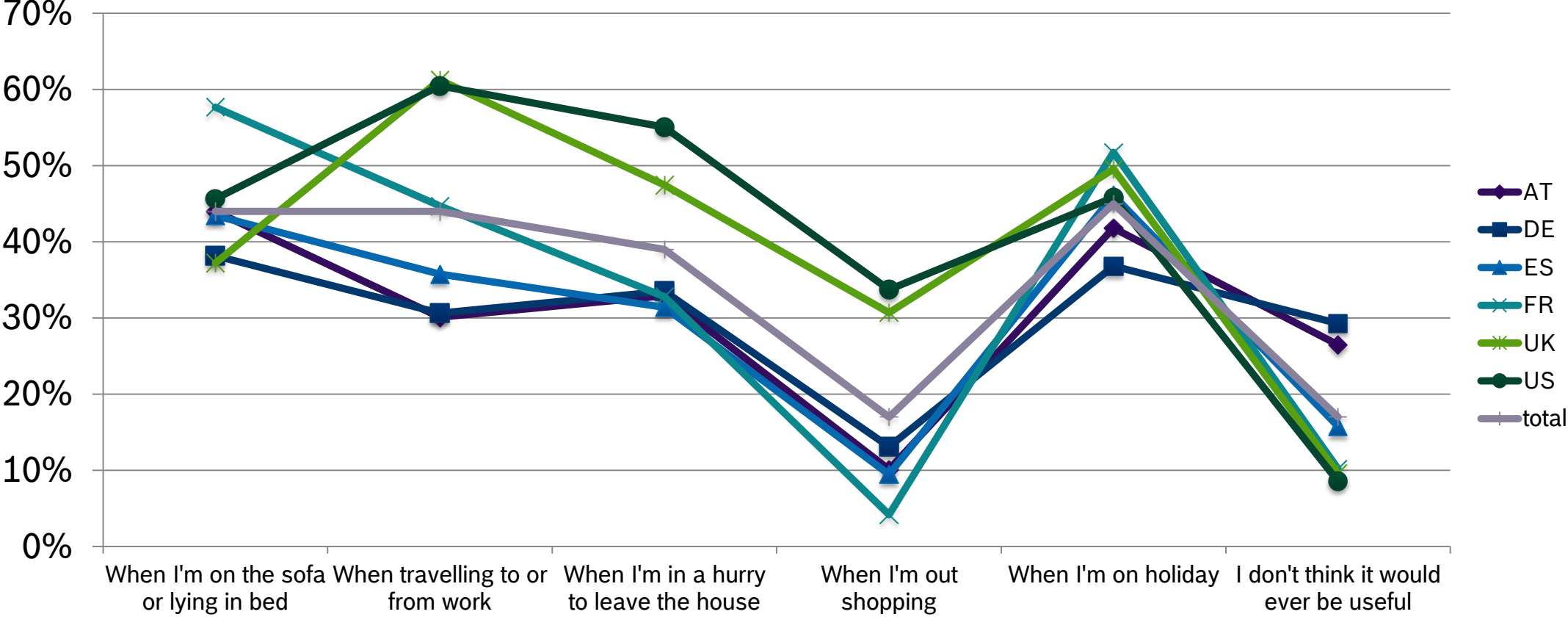
When do you think it would be most useful to be able to control devices in your home via a smartphone/tablet?

Overview

- ▶ About half of those surveyed would like to control their home while commuting as well as while on the sofa (44 percent each)
- ▶ The smart home is even in slightly more demand while on holiday (45 percent).
- ▶ The British and the Americans want to control their home “on the road” (about 60 percent each). Among the Spaniards, Germans and Austrians, this figure is only about half as high.

When do you think it would be most useful to be able to control devices in your home via a smartphone/tablet?

(select all that apply)



When do you think it would be most useful to be able to control devices in your home via a smartphone/tablet? (select all that apply)

	AT	DE	ES	FR	UK	US	Total
When I'm on the sofa or lying in bed	44%	38%	43%	58%	37%	46%	44%
When travelling to or from work	30%	31%	36%	45%	61%	60%	44%
When I'm in a hurry to leave the house	33%	34%	31%	33%	47%	55%	39%
When I'm out shopping	10%	13%	9%	4%	31%	34%	17%
When I'm on holiday	42%	37%	46%	52%	50%	46%	45%
I don't think it would ever be useful	26%	29%	16%	10%	10%	9%	17%

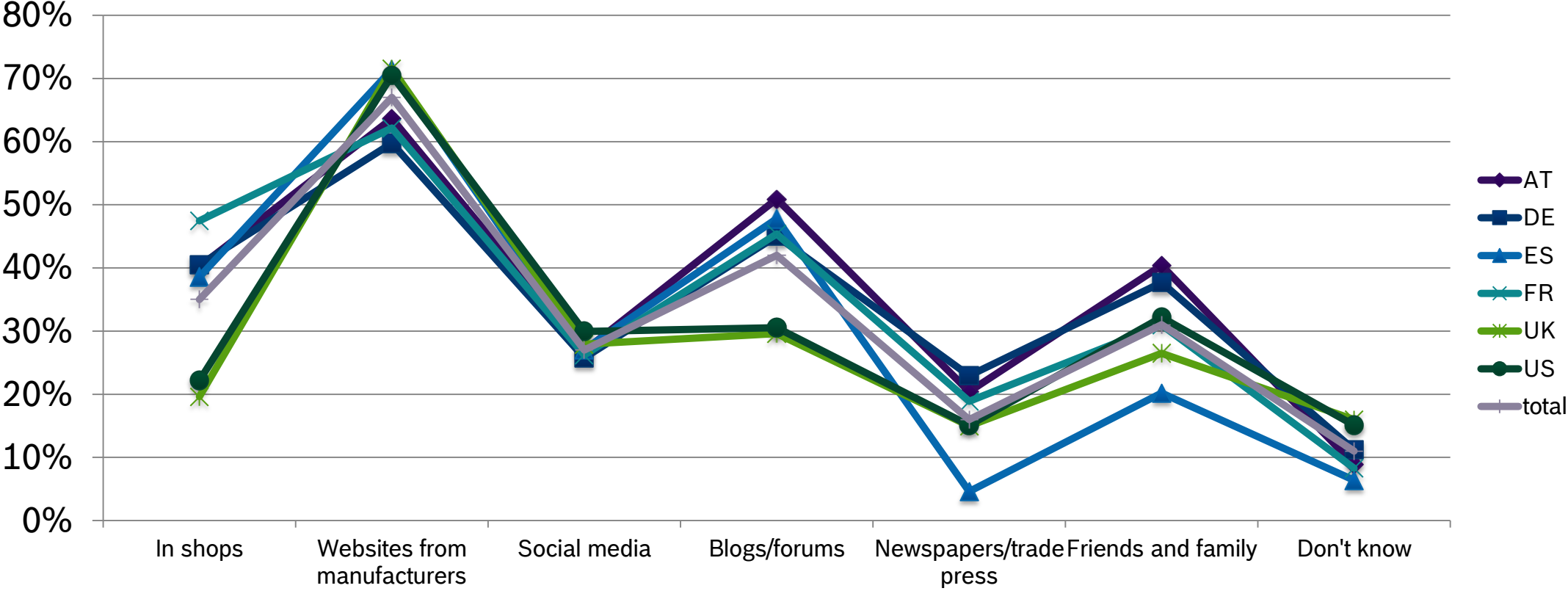
SOURCES FOR INFORMATION ABOUT SMART HOME APPLICATIONS

Where would you look for information on where to buy Smart Home devices?

Overview

- ▶ The internet is the most important source for information: 67 percent of those surveyed indicated that they would visit the manufacturers' and dealers' websites before purchasing smart home applications. 42 percent rely on blogs and forums.
- ▶ 35 Prozent would visit shops and brick and mortar retailers.
- ▶ By country comparison, the stationary trade plays a subordinate role in the UK and the US (22 and 20 percent).

Where would you look for information on where to buy Smart Home devices? (select all that apply)



Where would you look for information on where to buy Smart Home devices? (select all that apply)

	AT	DE	ES	FR	UK	US	Total
In shops	40%	40%	39%	47%	20%	22%	35%
Websites from manufacturers	64%	60%	71%	62%	72%	70%	67%
Social media	27%	26%	27%	26%	28%	30%	27%
Blogs/forums	51%	45%	48%	45%	30%	31%	42%
Newspapers/trade press	20%	23%	5%	19%	15%	15%	16%
Friends and family	40%	38%	20%	31%	26%	32%	31%
Don't know	9%	11%	6%	8%	16%	15%	11%

WOMEN AND MEN HAVE DIFFERENT VIEWPOINTS

The results by gender

Overview

- ▶ Men are more confident of what smart home technology can do compared to women.
- ▶ Men are usually convinced faster by the arguments for a smart home – except when it's about improved security, which women are more often convinced by (61 percent) than men (56 percent).
- ▶ Privacy is another factor that's more important to women than men (32 versus 29 percent).
- ▶ When in a hurry, women tend to wish to control their home via app more often than men (42 versus 37 percent).

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