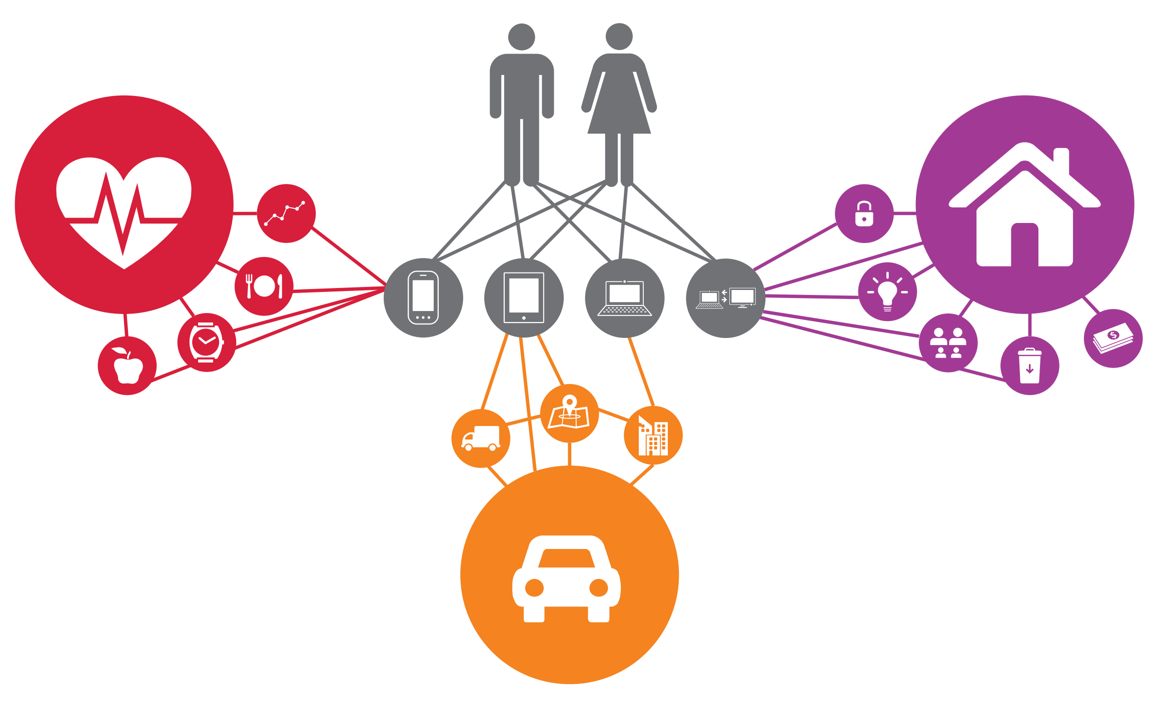
WHO LIVES THE CONNECTED LIFE?

AN INFOGRAPHIC SERIES TO EXAMINE USERS AND FUTURE INTENDERS OF CONNECTED CARS, HOMES AND WEARABLE TECHNOLOGY.

We once just looked at what consumers were doing on their smartphones, tablets and computers. Now, we're tasked with looking at The Internet of Things: all of these new and emerging connections that intertwine with one another in various ways.



MAJORLY CONNECTED CATEGORIES

CONNECTED CAR A car with built-in internet access (or a system that was acquired after-market) that allows for internet-enabled navigation, audio or video downloads, browsing, etc. OR controlling your car through a mobile device (remote start, unlocking, turning on heat or A/C, diagnostics, etc.) but excluding technologies that make you plug in your smartphone or use Bluetooth.

CONNECTED HOME/HOME AUTOMATION The control of your home through a mobile phone, connected device or computer, including lighting, HVAC, security systems, appliances, smart speaker systems, etc.

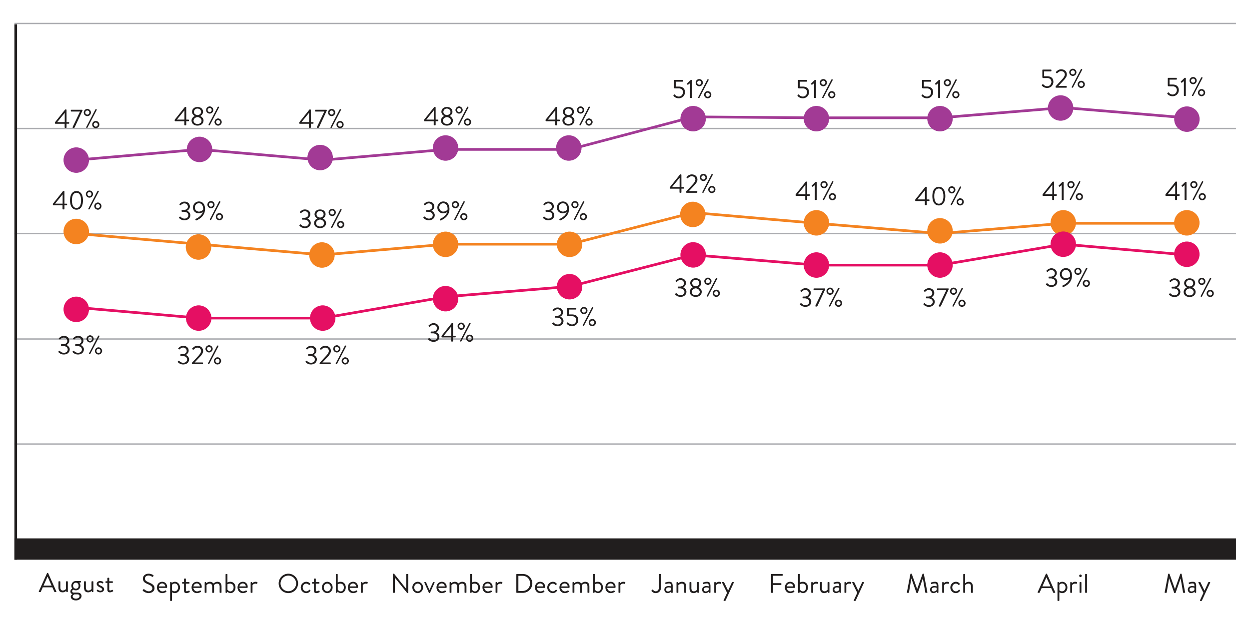
CONNECTED GADGETS AND/OR WEARABLE TECHNOLOGY Devices outside of phones, tablets/computers that are connected to mobile devices or have a direct internet connection and are wearable - including smartwatches, fitness bands and sensors, head-mounted displays like Google Glass, and other wearable devices.

ADOPTION:

Connected technologies are on the rise, with awareness levels steadily increasing and future intenders making plans to purchase — understanding the impact of these new technologies on the mobile ecosystem is critical. Adoption of Connected Cars, Homes, and Wearables is **6%**, **6%**, and **5%**, respectively. In comparison, tablet penetration in early 2011 was 5% and is now 33%.

AWARENESS & ADOPTION: Q2 2014 FINDINGS

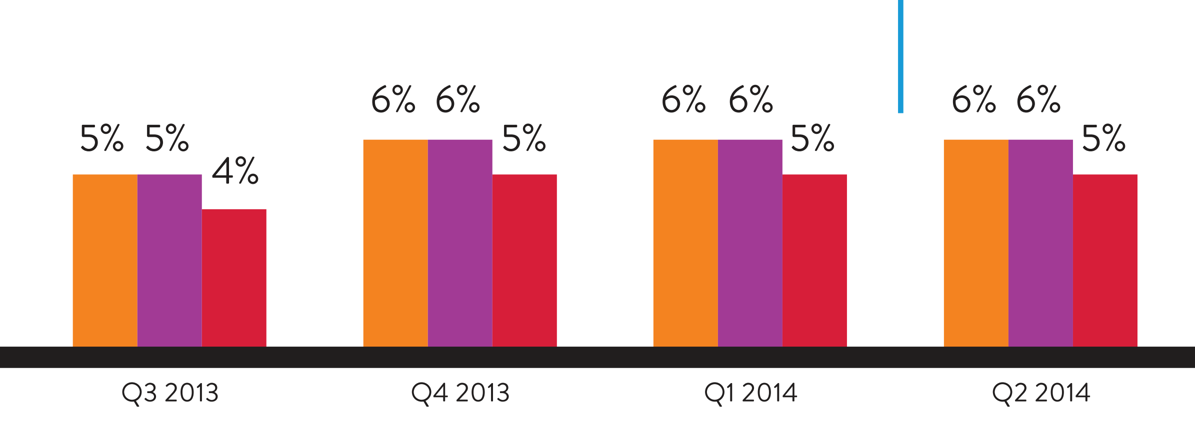
AWARENESS OF CONNECTED CARS, HOMES AND WEARABLES
"I KNOW WHAT IT DOES"



Source: Nielsen Connected Life Survey
CQ1: Please indicate how familiar you are with each of the following technologies
CQ2: Do you currently own, use, or subscribe to any of the following technologies?

ADOPTION OF CONNECTED CARS, HOMES AND WEARABLES
AMONG ALL HOUSEHOLD DECISION MAKERS

Takeaway: Awareness of these technologies is fairly high, adoption within the general population remains low. However, adoption rates among those in the know are double the general population rate, ranging from 12–14%.



Source: Nielsen Connected Life Survey
CQ2: Do you currently own, use, or subscribe to any of the following technologies?

CONSUMPTION:

When consumers own more devices, they demand more data. Despite being an emerging segment, these connected technologies are causing customers to rethink their data usage needs. Owners are consuming more and more data and as additional devices materialize, this data consumption will only increase.

MARKETING TIP:

Offer deals for more data! Roughly one-third of users report increasing their wireless data use as a result of acquiring connected technology. Approximately 25% of users have increased their wireless data plans as the result of acquiring these new technologies. Likelihood of increasing data plans to accommodate new connections is evident; connected car owners lead the way with 70% intending to increase.

CONSUMPTION: Q2 2014 FINDINGS

Has using these new technologies increased your wireless data usage?

37% INCREASED wireless data usage

40% INCREASED wireless data usage

28% INCREASED wireless data usage

As a result of using these new technologies have you increased your data plan?

22% 26% 23%

INCREASED wireless data plan

Likeliness of upgrading data to accommodate new connections?

Very likely 27%
Likely 43%

Very likely 26%
Likely 39%

Very likely 7%
Likely 18%

HOME CAR WEARABLES

Source: Nielsen Connected Life Report (US), Q2 2014

INTENT:

Interest in connected cars, homes, and wearables continues to rise, and new devices are just around the corner. Understanding what is spurring interests, driving acquisition, and what consumers wish for in the future is beneficial to all players in the mobile arena. Intenders, or people who are extremely, very, or somewhat interested in the following technologies, are a key audience as they may be more likely to purchase.

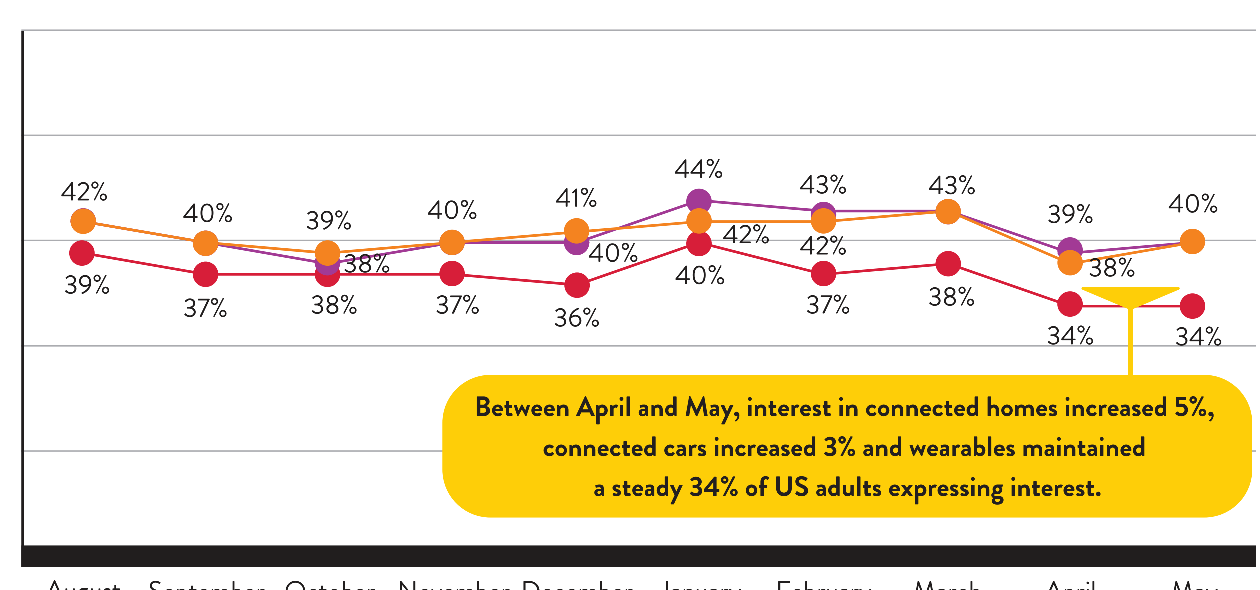
INTEREST AMONG INTENDERS: Q2 2014 FINDINGS

CARS
Future intenders are most driven to purchase because they feel connected cars are cool, provide entertainment to passengers, and increase their productivity on the road.

HOMES
Future intenders are most driven to purchase because managed security solutions and home automation provide peace of mind, safety, and security.

WEARABLES
Future intenders are most driven to purchase by a desire to self-monitor, having on-the-go convenience, and for the specific features and functions they provide.

INTERESTED IN CONNECTED LIFE TECHNOLOGIES



Source: Nielsen Connected Life Survey
CQ3: How interested are you in using each of the following technologies?
*Data represents consumers saying extremely, very, or somewhat interested

WHAT ARE INTENDERS SPECIFICALLY LOOKING FOR?

#1 60% INTERNET-ENABLED NAVIGATION

#2 59% AUTOMATIC CRASH NOTIFICATION/ ROADSIDE ASSISTANCE

#3 51% VEHICLE MAINTENANCE/ REPAIR DIAGNOSTICS

#4 49% REMOTE CONTROL CAPABILITIES

#1 71% HOME SECURITY

#2 70% HOME AUTOMATION

#3 47% SMART SPEAKERS

#4 25% CONNECTED APPLIANCES

#1 51% FITNESS BANDS

#2 44% SMARTWATCHES

#3 36% mHEALTH DEVICES

#4 25% HEAD-MOUNTED DISPLAYS

*Several other Connected Car technologies are included in the syndicated survey; only top 4 shown here

CONTACT US:

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