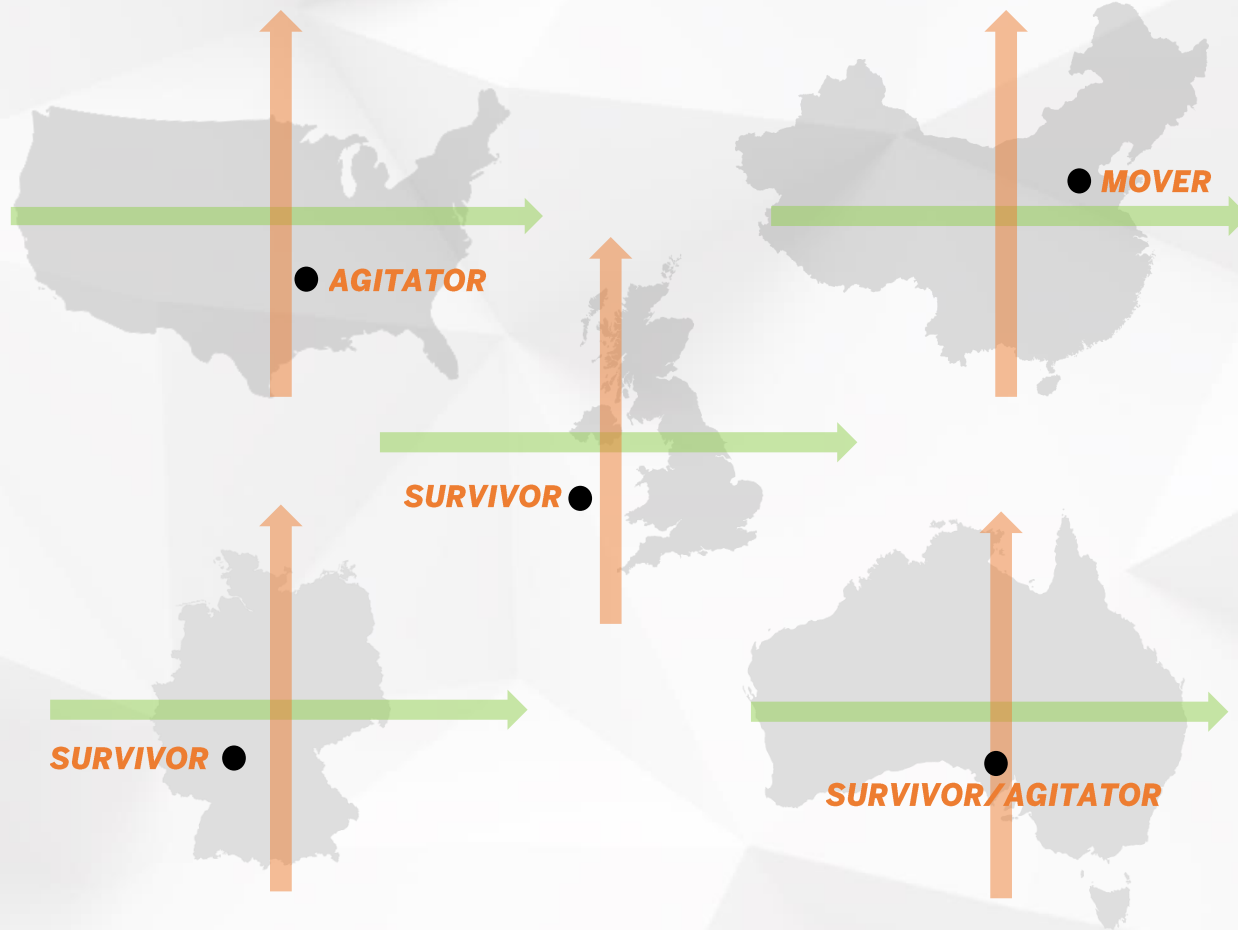




BRANDS IN ***MOTION***

SMART HOME CATEGORY

SMART HOME **CATEGORY**



SMART HOME:

Including devices and subscription related hubs, smart appliances (fitness, washer/dryer, baby monitors), smart entertainment (gaming, TVs), utility management (thermostats, light switches) and safety and security (security cameras, door and window locks).

The category was surveyed in 5 of the 6 markets.

The category is seen as a survivor in the UK and German markets, a Mover in China, an Agitator in the US, and a Survivor Agitator in Australia based on the average emotional and rational responses of those surveyed.

A total of 3,577 people answered questions specific to the Smart Home category across the five markets surveyed.

(US: 633, UK:755, China: 795, Australia: 630, and Germany: 764)



GLOBAL VIEW: **SMART HOME**



OBSERVATIONS

- China has the most optimism for the category both rationally and emotionally with the highest average responses of any market surveyed.
- UK respondents showed the most skepticism for the category with the lowest average emotional and rational responses of any market surveyed.

Data represents an average respondent score on a scale of -100 to 100 across the ten category drivers. (6 Emotional and 4 Rational)

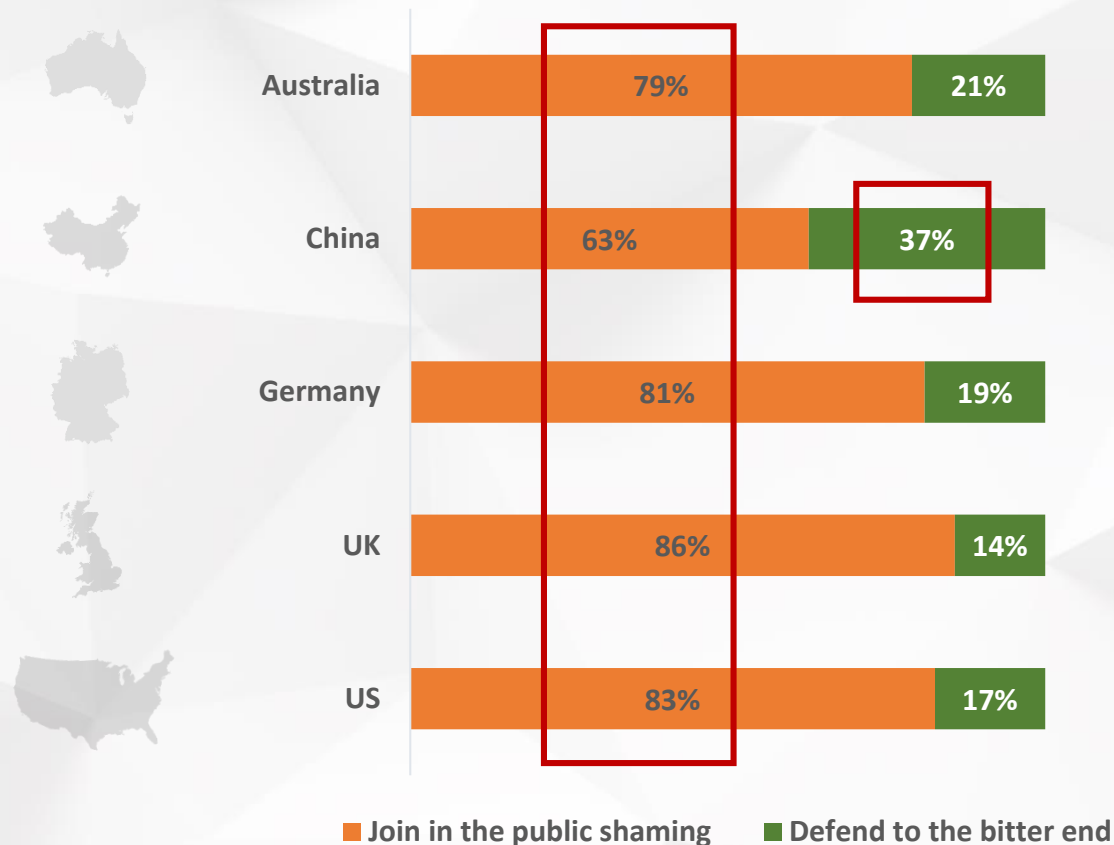




BRANDS IN ***MOTION***

Emotional Drivers

GLOBAL VIEW: **EMOTIONAL DRIVER**



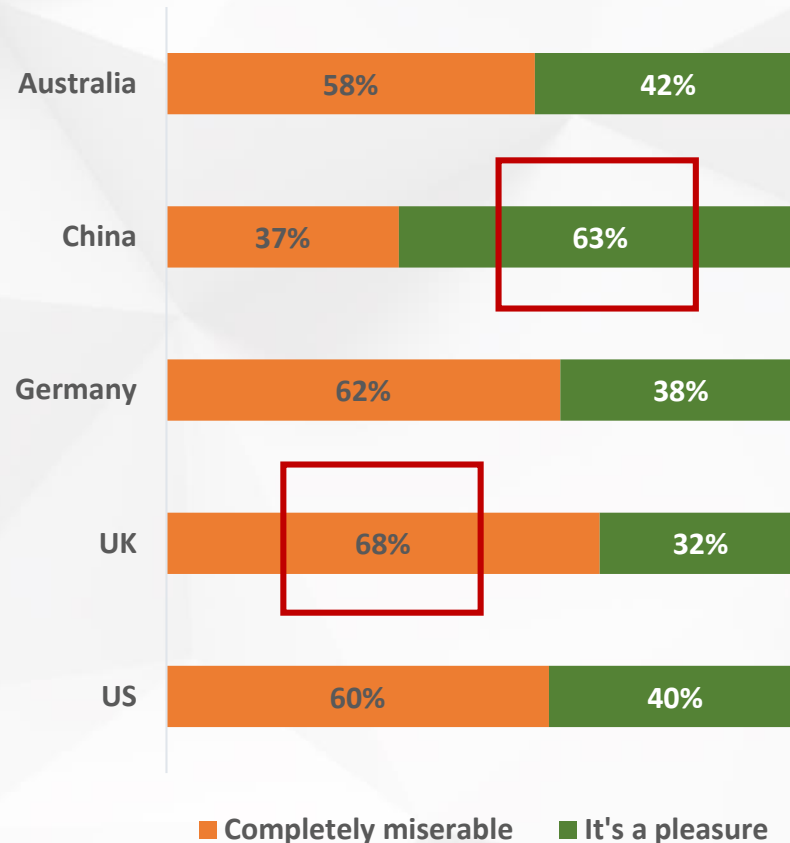
DEFEND OR SHAME

Suppose a Smart Home Company was publicly under attack for a product or service issue, would you?

- Majority of respondents in all 5 markets would "Join in the public shaming". Chinese respondents were the most likely to defend.



GLOBAL VIEW: **EMOTIONAL DRIVER**



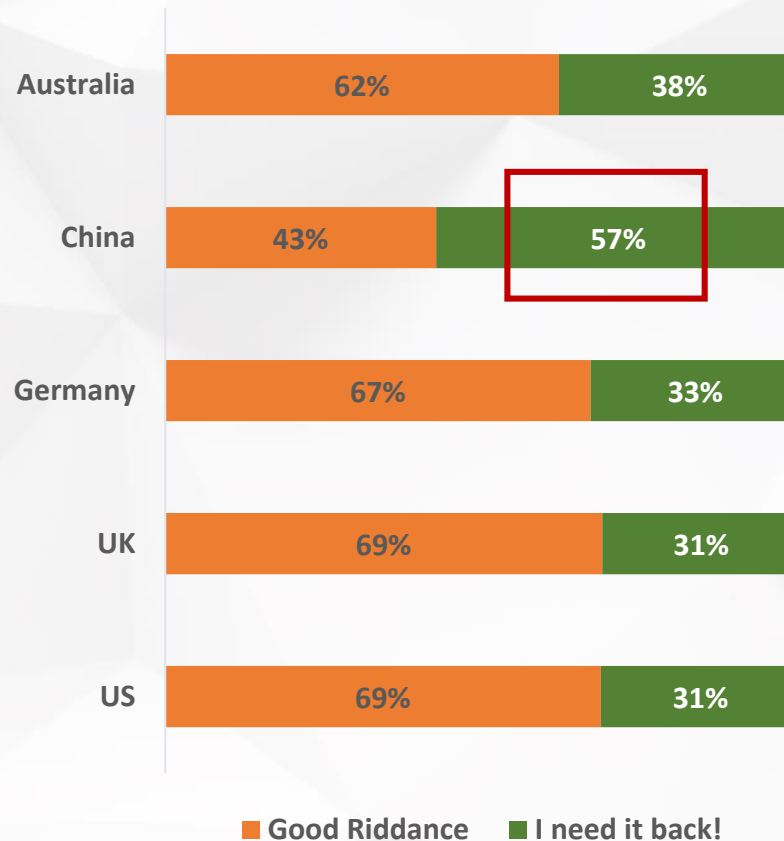
EXPERIENCE

When interacting with Smart Home Companies, generally how is the experience?

- China market was the only market to have a larger percentage of respondents who expressed "it's a pleasure" vs. "Completely Miserable."
- UK respondents had the most skepticism with nearly 7 out of 10 respondents responding with "Completely miserable, when asked about the experience with Smart Home Companies."



GLOBAL VIEW: **EMOTIONAL DRIVER**



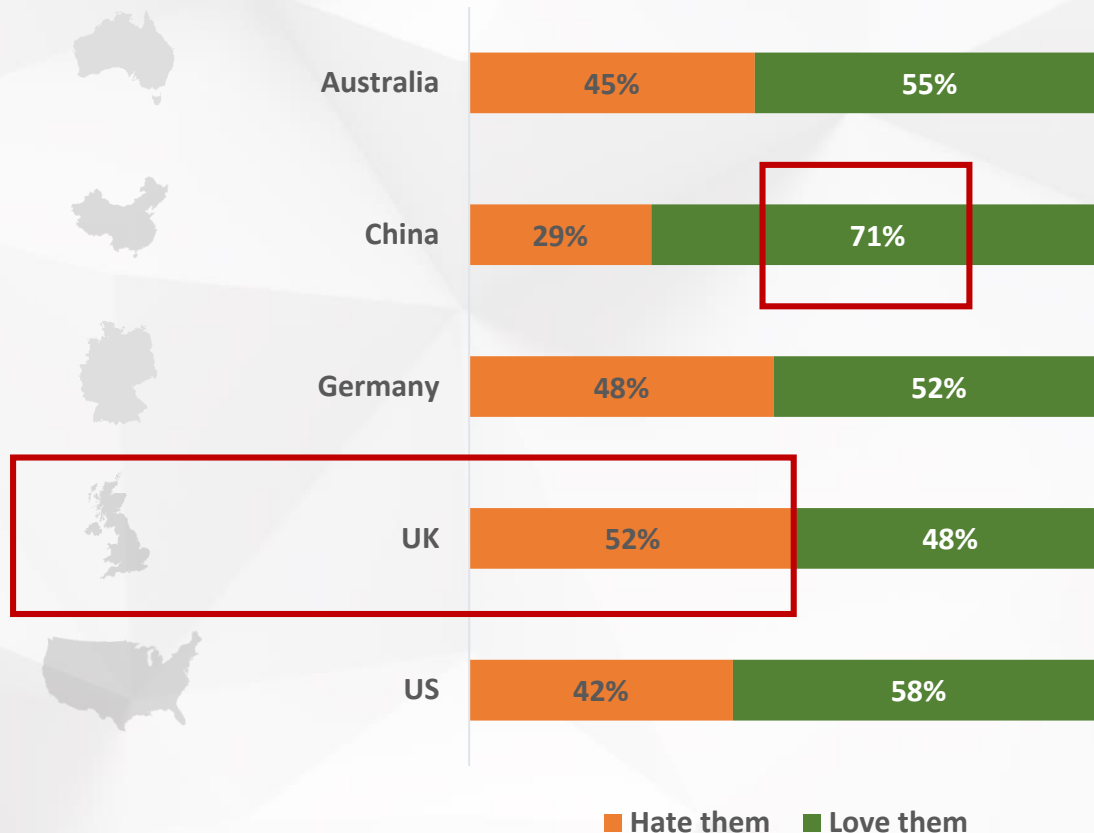
DISAPPEARED

If the Smart Home were to one day just disappear, how would you feel?

- At nearly 60%, China was the only market with the majority of respondents responding with "I need it back!"



GLOBAL VIEW: **EMOTIONAL DRIVER**



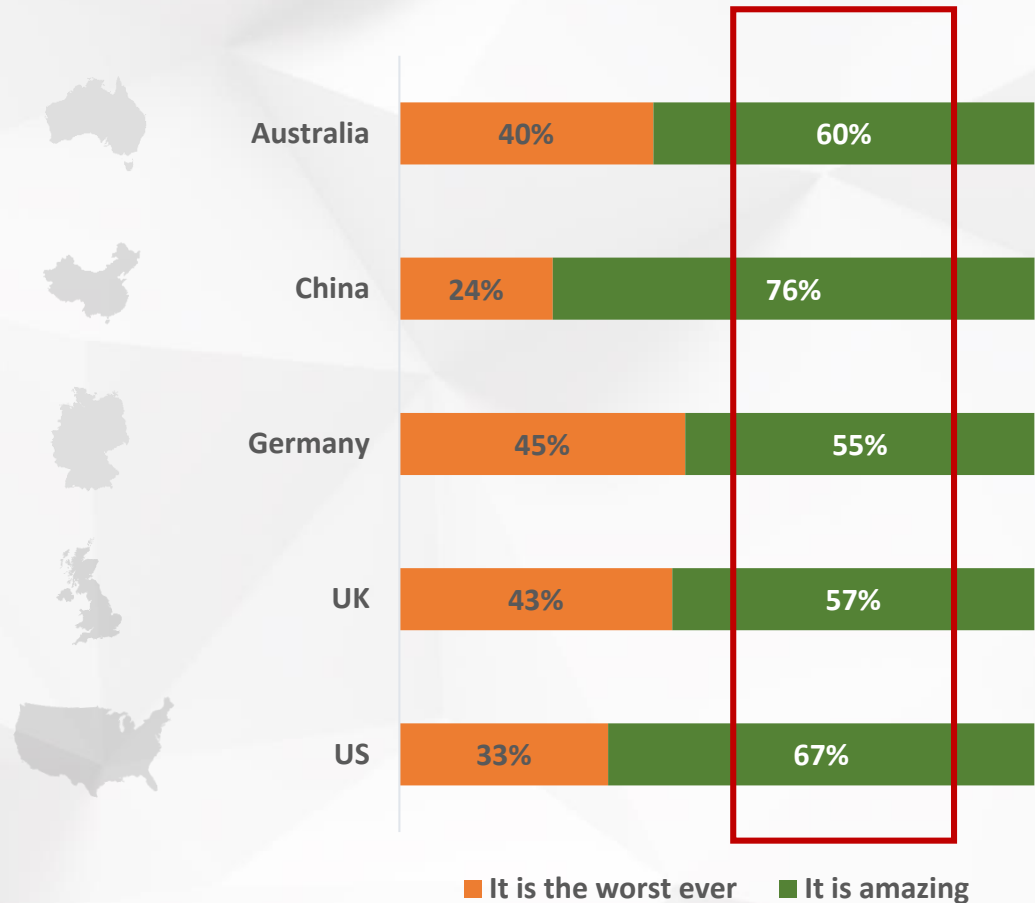
LOVE/HATE

When thinking about Smart Home companies do you generally...?

- At 52%, respondents in the UK were the only market to have the majority express "hate" towards Smart home countries.
- With 7 out of 10 respondents in China indicating "Love them", China showed the most love for the smart home category.



GLOBAL VIEW: **EMOTIONAL DRIVER**



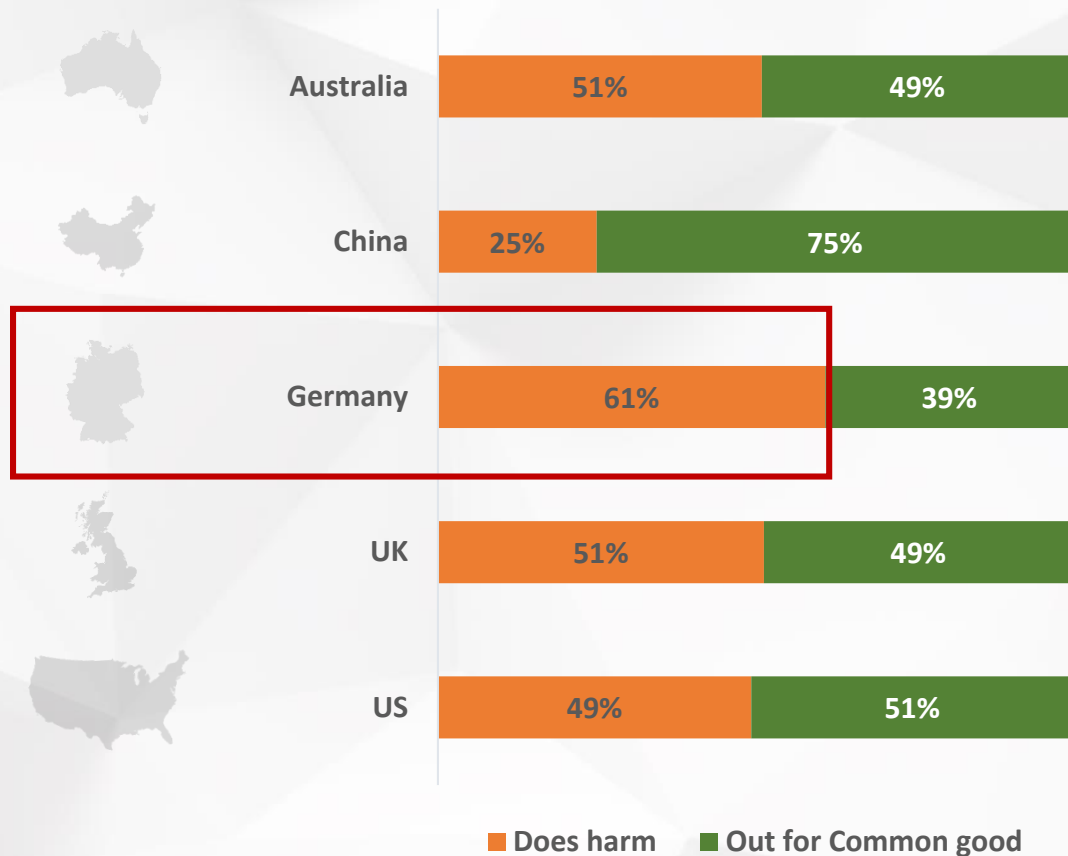
OVERALL IMPRESSION

What is your overall impression of Smart Home companies?

- Majority of respondents in all five markets responded "It is amazing" when asked about the overall impression of Smart Home Companies.



GLOBAL VIEW: **EMOTIONAL DRIVER**



SOCIAL IMPACT

When thinking about Smart Home companies, what is their overall impact on society?

- At 61%, German respondents had the highest response percentage of any market for “Does Harm” when asked about the categories impact on society.

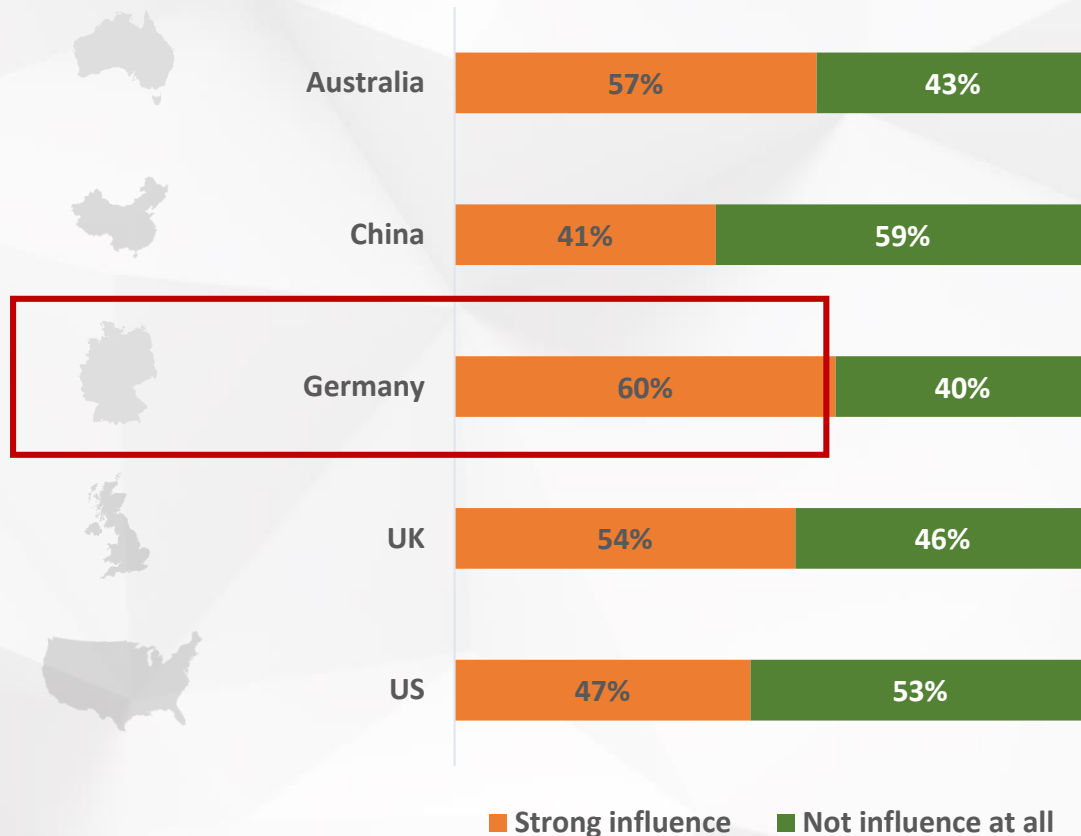




BRANDS IN ***MOTION***

Rational Drivers

GLOBAL VIEW: **RATIONAL DRIVER**



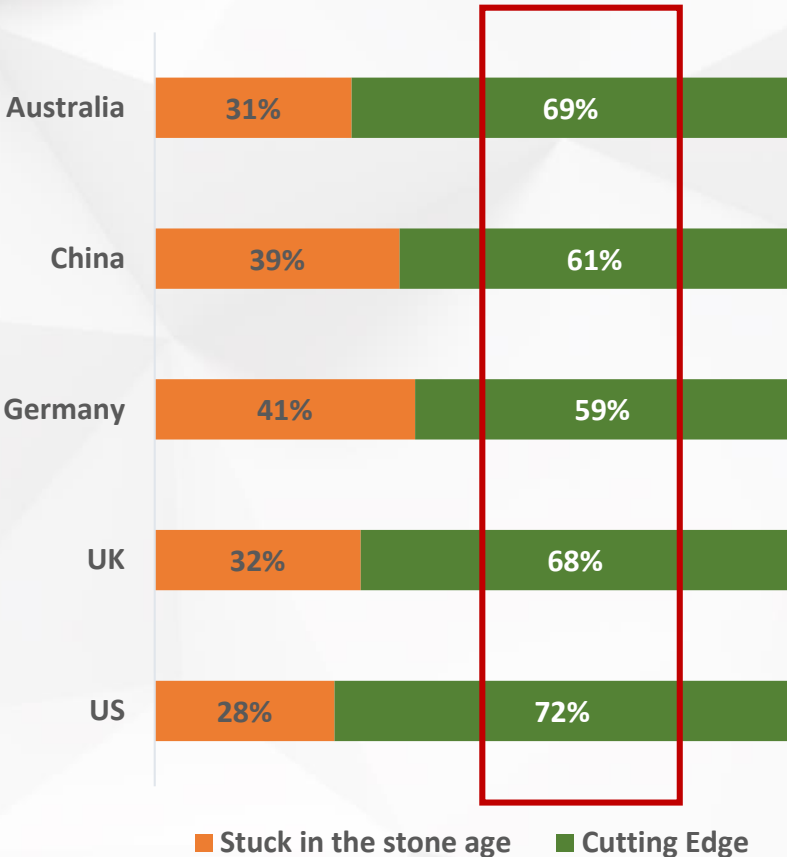
EXECUTIVE BEHAVIOUR

Would the behaviours of the executive leaders of a company in the Smart Home industry influence your decision to support the brand or not?

- Germany had the highest percentage of respondents indicate “Strong Influence” when asked about the behaviours of the executive leaders of a Smart Home company and whether that influences their decision to support a brand or not.



GLOBAL VIEW: **RATIONAL DRIVER**



INNOVATION

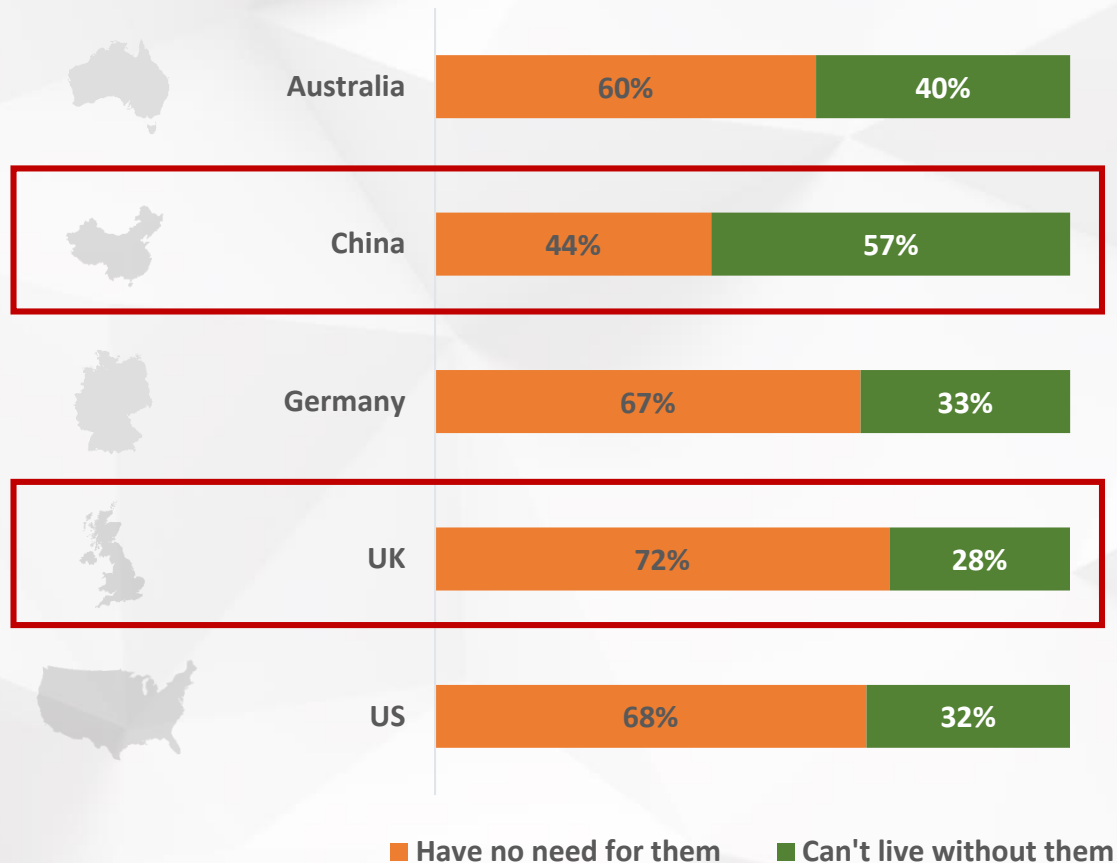
How innovative are Smart Home Companies?

- Majority of respondents in all 5 markets believe that Smart Home Companies are “Cutting Edge”, US respondents had the highest percentage at 72%.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



GLOBAL VIEW: **RATIONAL DRIVER**



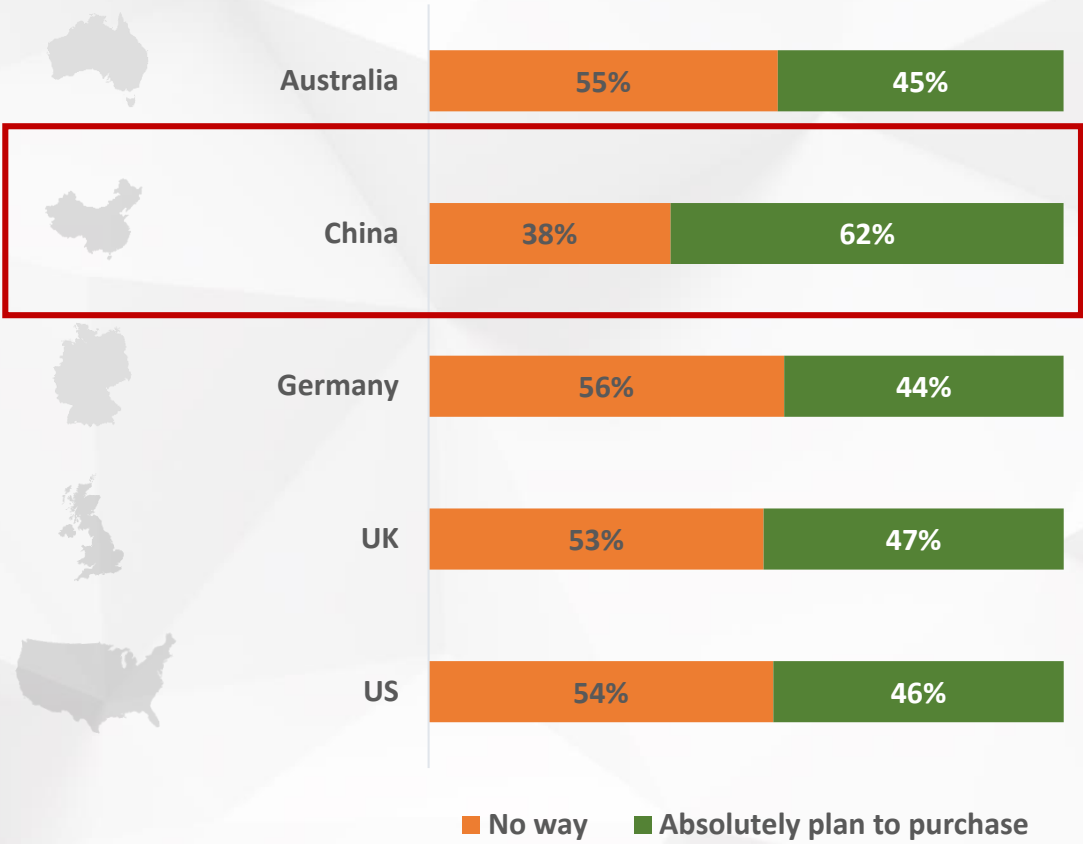
NECESSARY

How necessary are Smart Home Companies to your life?

- China was the only market to have the majority of respondents (57%) respond with “Can’t live without them” when asked how Necessary Smart Home Companies are to your life.
- UK respondents most skeptical with 72% saying they “Have no need for them”.



GLOBAL VIEW: **RATIONAL DRIVER**



INTENT TO PURCHASE

How likely are you to purchase products or services from Smart Home companies in the next year?

- China, with over 6 out of 10 respondents showed the highest intent to purchase out of any market surveyed.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

