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CONNECTED LIFE: CANADIAN TRENDS

CONNECTED HOMES, CONNECTED CARS, WEARABLE
& SMART WATCH

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November 25th, 2014

Introducing **CONNECTED LIFE** by:



Identifying and quantifying
Users & Futures intenders

Of Connected Homes, Connected Cars &
Wearable technologies...



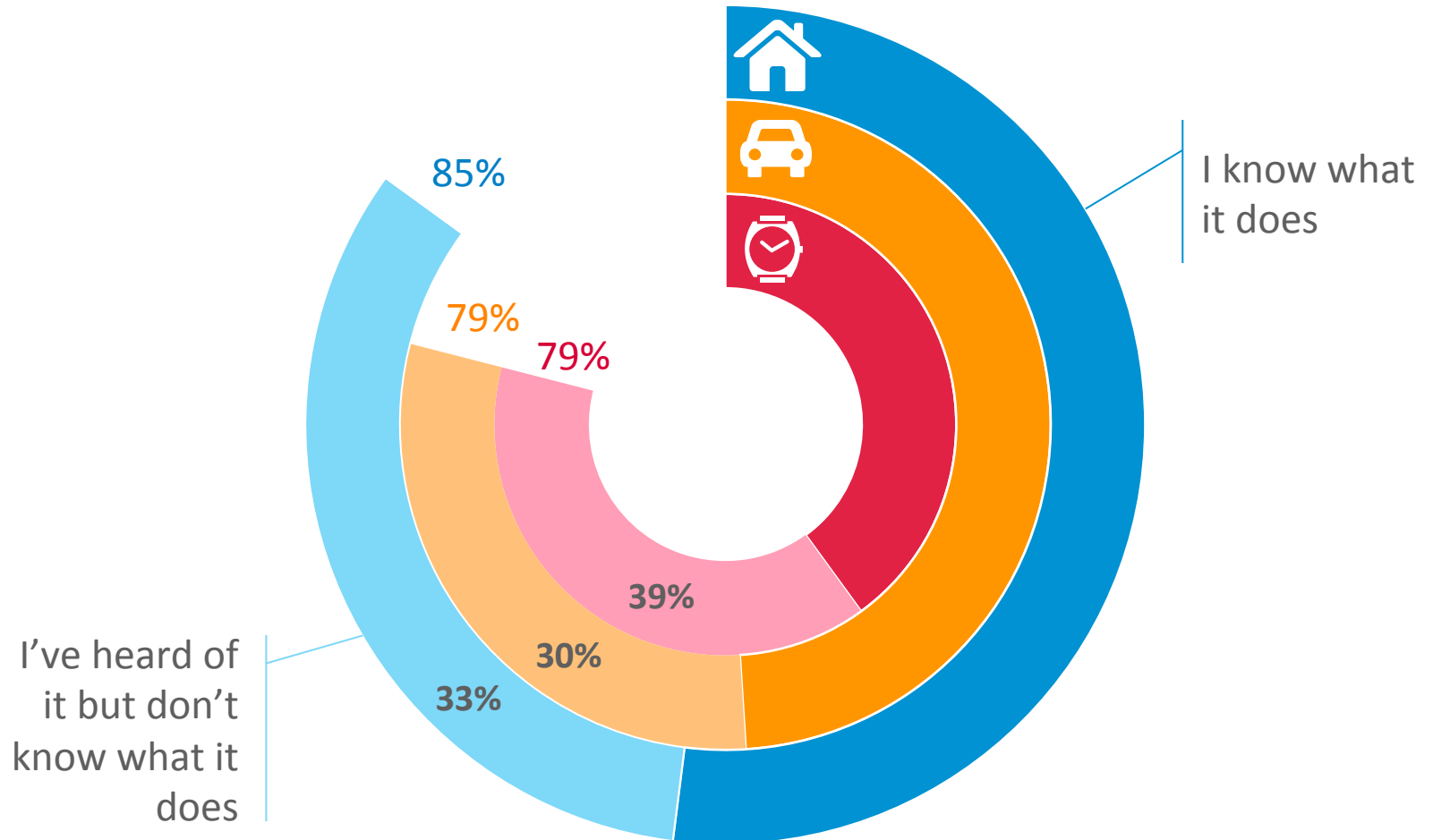
...and providing an exclusive focus on
smart watch for We Are Wearables

2035 Canadians, representative of the general
population 18+ (gender/region),
were interviewed by phone & cell phone,
from Nov 6th to Nov 13th

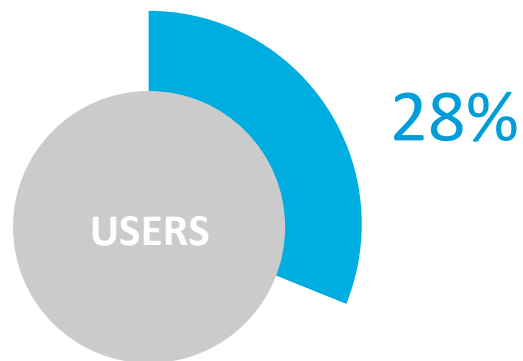


AWARENESS & FAMILIARITY

Still some room for communication and democratization...

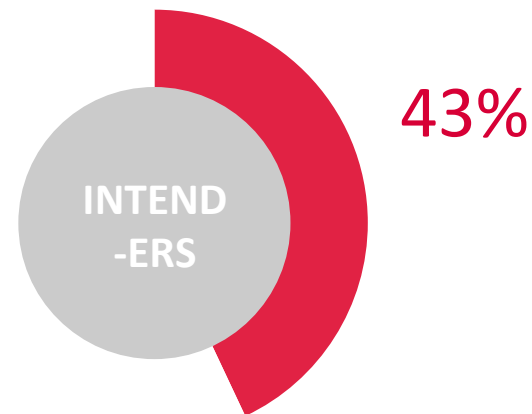


CONNECTED TECHNOLOGIES – AT LEAST ONE



Users over-index within:

- **Early adopters** (165)
- **Male** (114)
- **18-24** (122)
- **45-54** (121)
- **Big Households** (122)
- **Income 120K+** (158)
- **Ontario** (109)

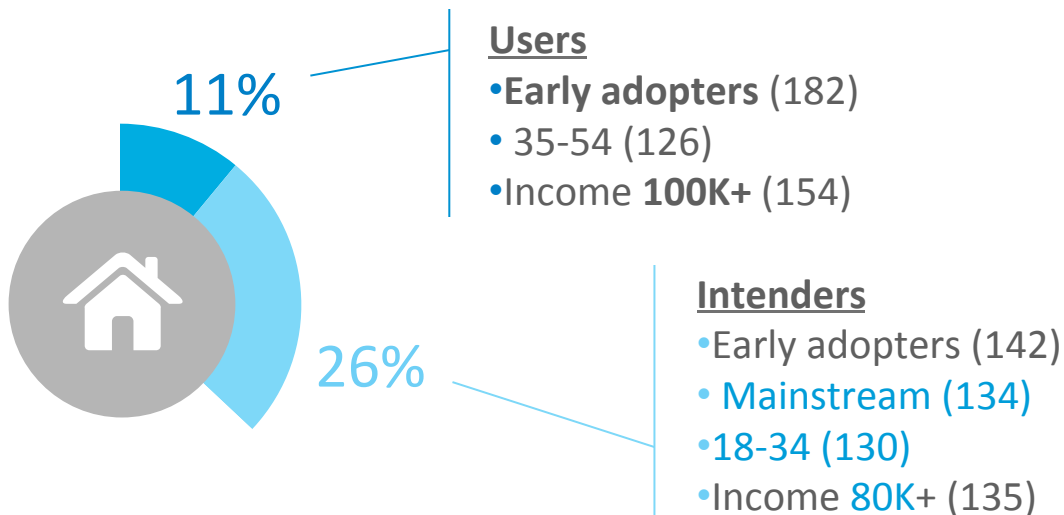


Intenders over-index within:

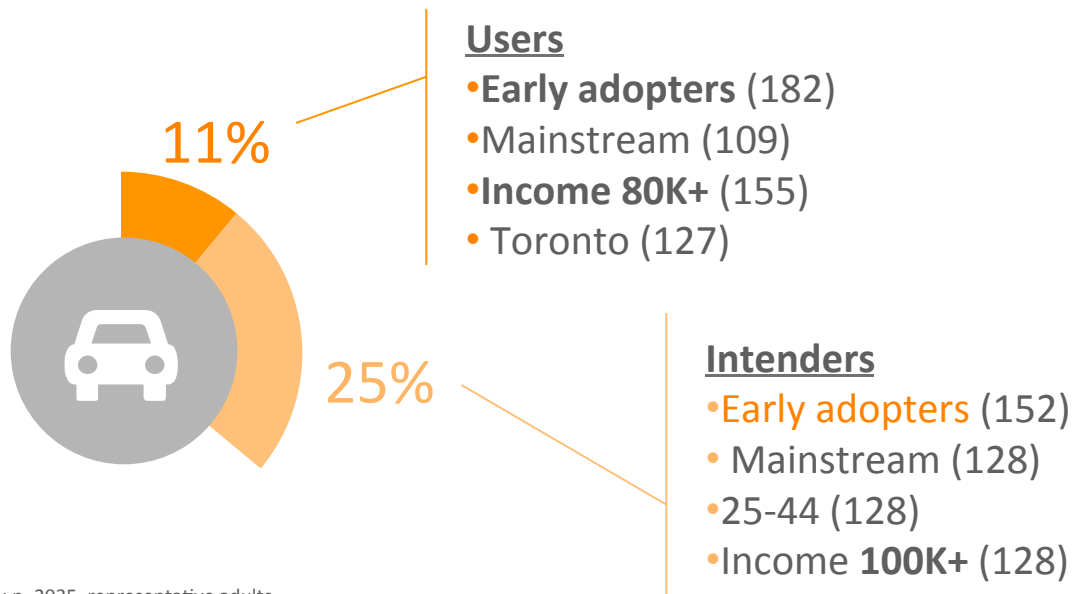
- **Early adopters** (137)
- **Mainstream** (132)
- **18-24** (140)
- **25-34** (127)
- **Big Households** (123)
- **Income 80K+** (123)
- **Ontario** (108)



IDENTIFYING USERS vs INTENDERS



Connected Home Intenders open to younger and lower income individuals

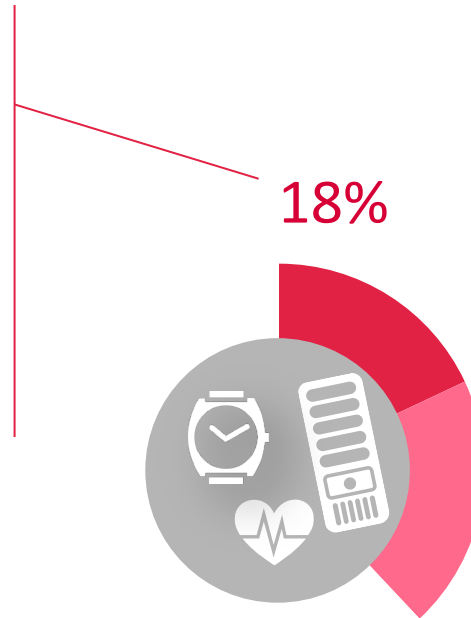


Connected Car Intenders remain more selective and stigmatized as early adopters and higher income earners

IDENTIFYING USERS vs INTENDERS

Wearable Users

- **Early adopters** (200)
- Mainstream (117)
- 18-24 (155)
- 35-44/45-55 (128/122)
- Income **80K+** (136)
- Toronto (144)
- Vancouver (155)



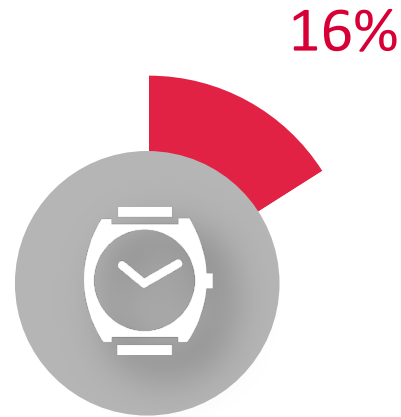
A more democratized
but also polarizing
Wearable landscape

Wearable Intenders

- Early adopters (135)
- **Mainstream** (150)
- **18-24** (150)
- 25-34 (120)
- Income 40-60K+ (115)
- Income 100k+ (120)

IDENTIFYING USERS vs INTENDERS

16% of the wearable users own a smart watch (3% of the total population)...



Smart watch owners

- Early adopters (366)
- **18-24** (233)
- 35-44 (166)
- Income **100K+** (200)
- Toronto (166)

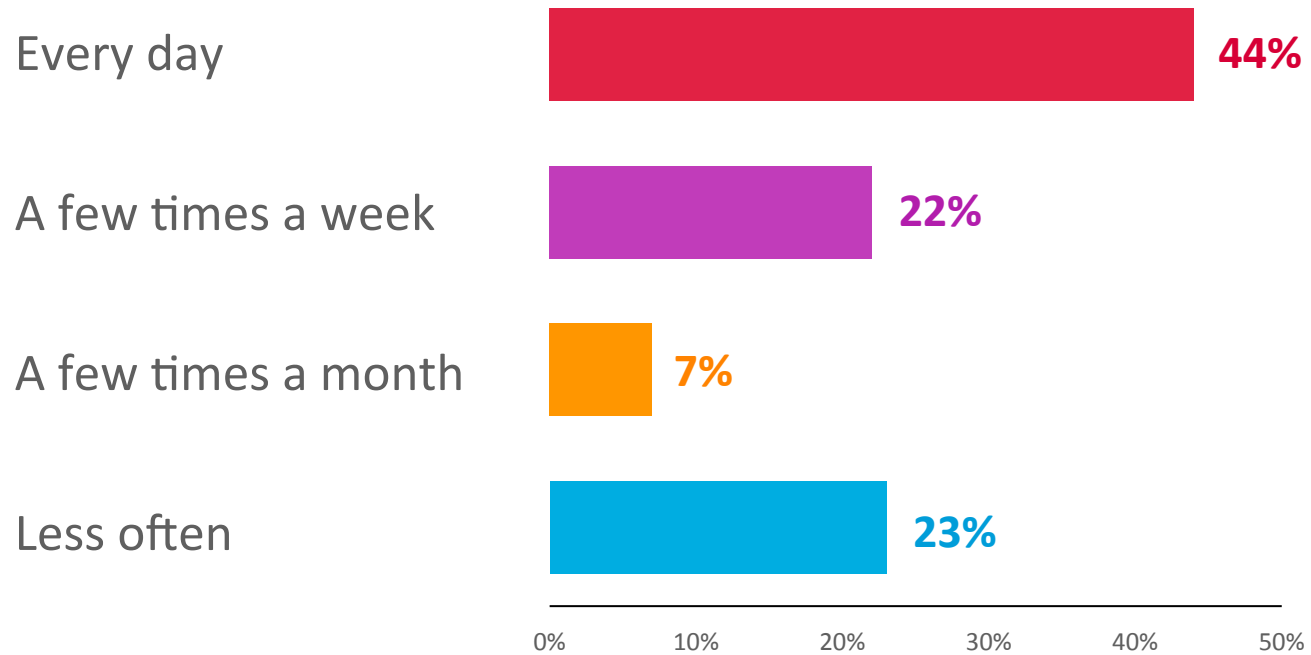
...4% of the general population intend to buy one by the end of the year, and 9% within the next year.

“A market mainly driven by addicts: 39% of actual smart watch owners intend to buy another one this year or the next.”

SMART WATCH USERS



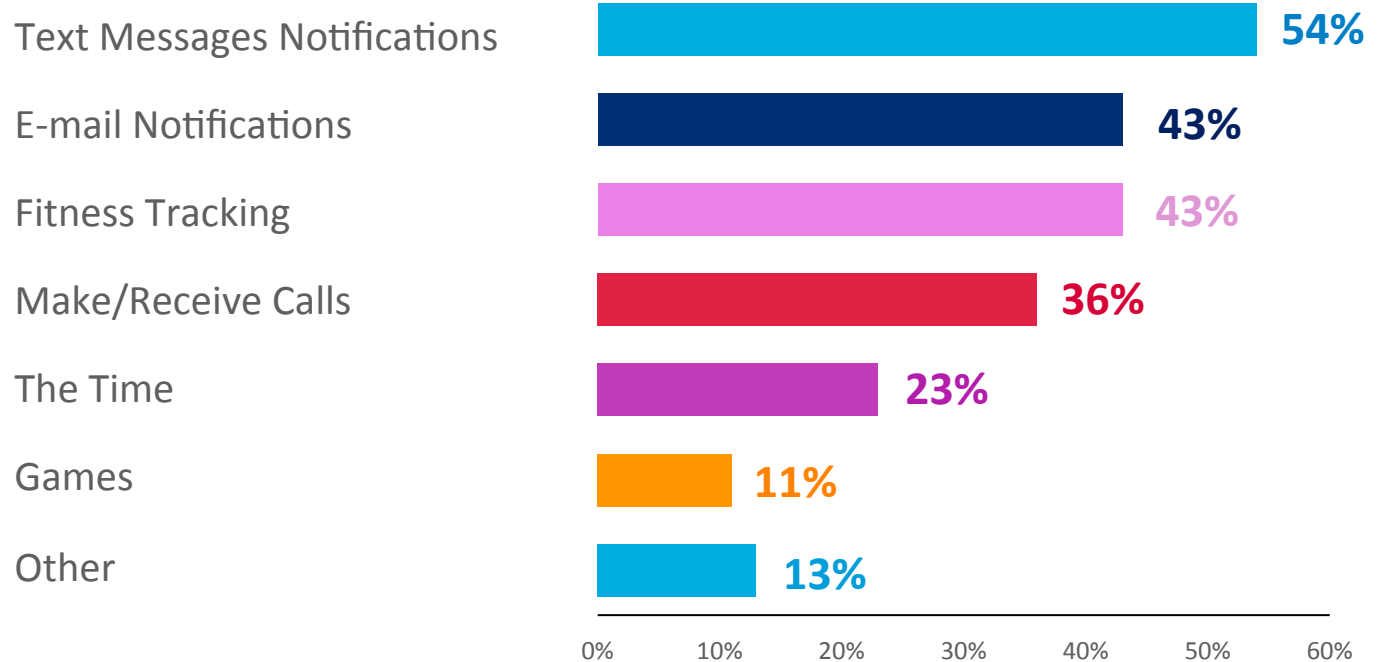
16% of the wearable users own a smart watch (3% of the total population),
and wear it...



SMART WATCH INTENDERS



41% of the wearable intenders plan to buy a smart watch this year or the next (8% of the general population), and are most interested in the following features...



Base: n=173, those who don't have but intend to buy a smart watch

An abstract graphic on the left side of the page. It features a dense grid of thin, curved lines in various colors (blue, green, yellow, orange, red, purple) that originate from a vertical black bar on the far left and fan out towards the right. Several lines terminate in small colored dots of the same color as the line they represent. The overall effect is one of a complex, interconnected network.

CONNECTED LIFE AT A GLANCE

CONNECTED LIFE

A fundamental and ongoing market intelligence of an expanding & fast-moving sector



The Deep Dive Survey

focuses on users & futures intenders of Connected Technologies

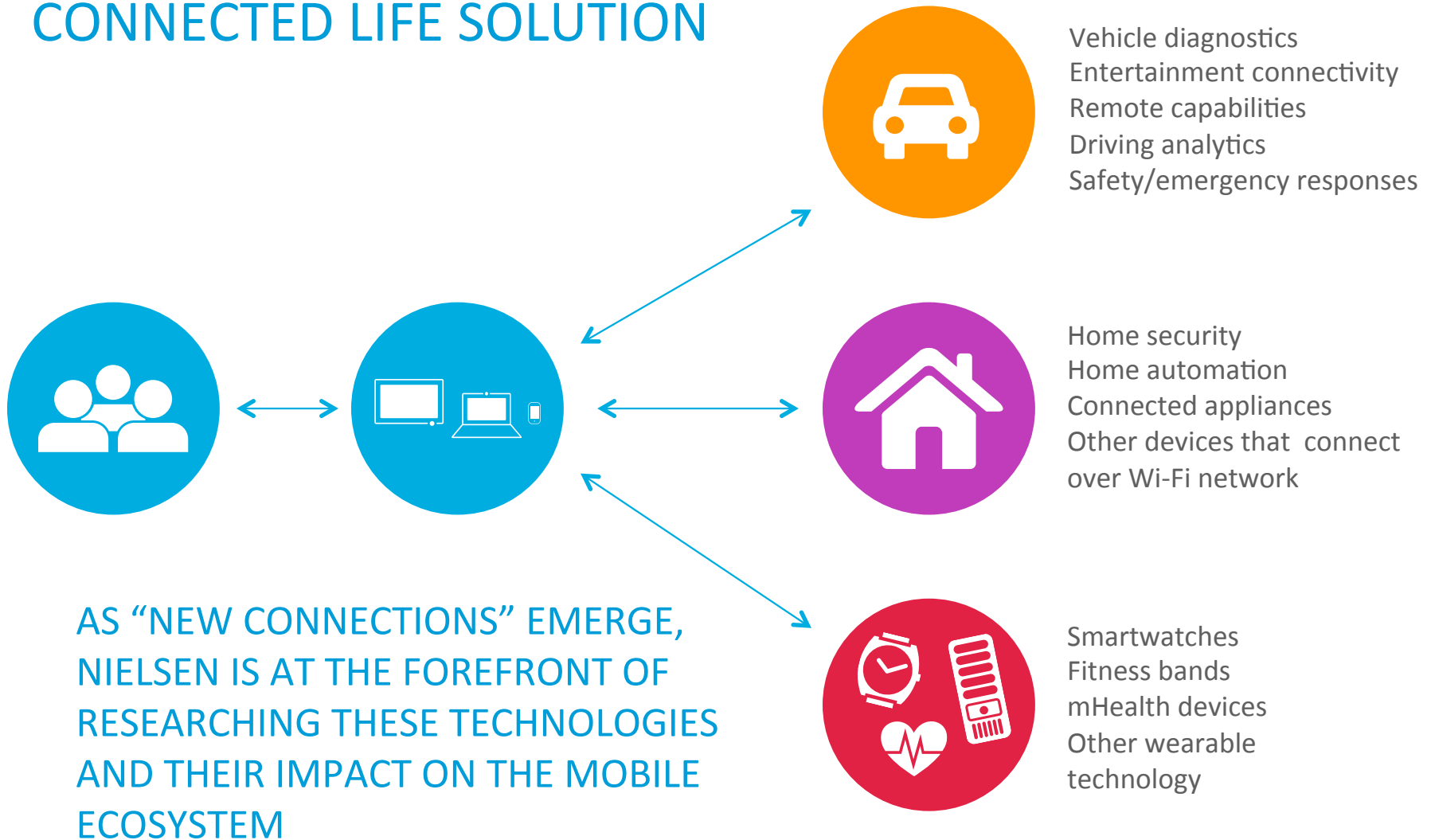
Spanning Usages & Attitudes

exploring drivers, barriers, brand preference, channel,...

To identify your most promising consumer & how to best engage with them

a decision making road map

CONNECTED LIFE SOLUTION

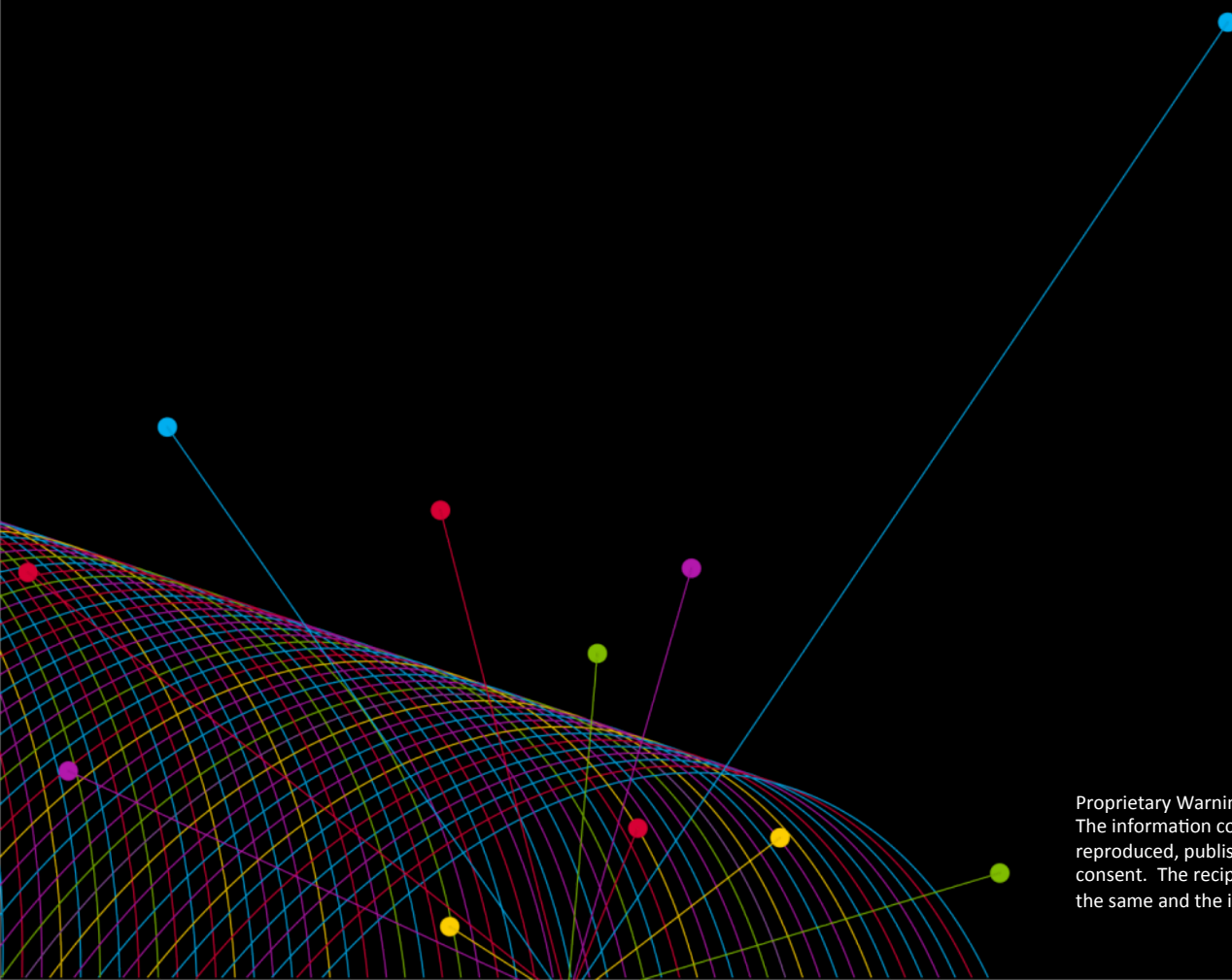


The included connections and devices will be continuously updated to evolve with the industry

THANK YOU

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.....

AN UNCOMMON SENSE
OF THE CONSUMER™



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