



SIEMENS

Why people strive for a Seamless Life.

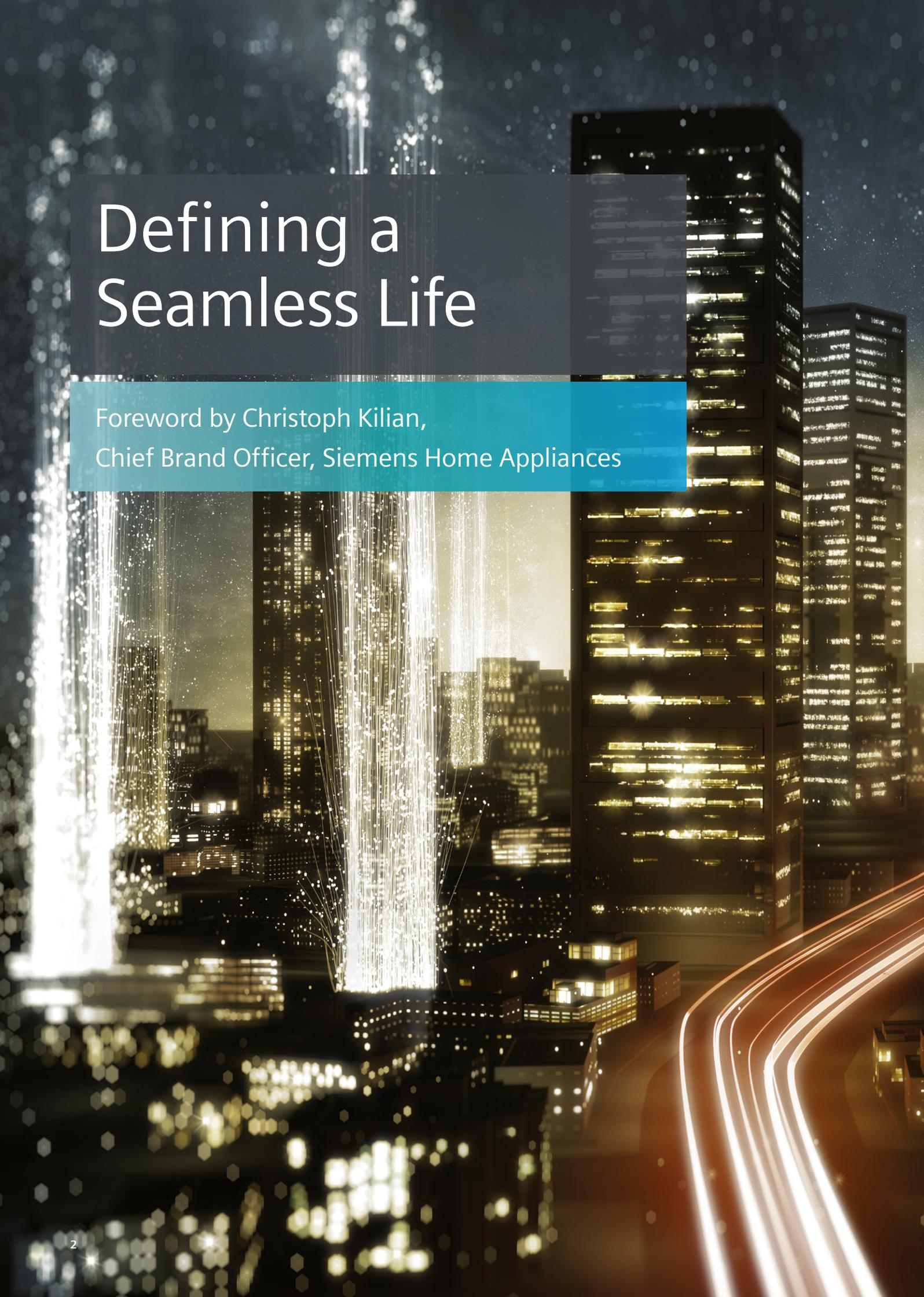
2nd Edition – spotlight on:
How people pursue a connected lifestyle.
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The future moving in.

Siemens Home Appliances,
in partnership with

Goldsmiths
UNIVERSITY OF LONDON

Siemens Home Appliances



Defining a Seamless Life

Foreword by Christoph Kilian,
Chief Brand Officer, Siemens Home Appliances

“At Siemens Home Appliances, we believe that everyday life should be a world of possibilities that people can simply reach out to and experience.”



Christoph Kilian
Chief Brand Officer
Siemens Home Appliances

Foreword

What does a Seamless Life mean to you? Being connected? Using the latest technology flawlessly? Spending time doing what you want to do rather than what you have to do? Across the board, there is powerful enthusiasm for an integrated, progressive lifestyle. One in which everyone is empowered to exist in an interconnected ecosystem of people, culture and technology. And one where we can take control of our life in a frictionless way.

In today's world, the speed and constant nature of change have never been greater. Social media and smart technology have made our lives faster, better connected and often more interesting. But 21st century lifestyles are busy, and it can be hard to adapt to the pace of this global cultural evolution.

As a leading global home appliances brand, Siemens is tasked with ensuring our consumers feel able to harness the full potential of advances in intelligent technology to overcome daily challenges. That means getting to grips with what a modern, connected life looks like and understanding the reasons people strive for it. That's why, in 2016, we began the process of understanding the specific needs, hopes and expectations of consumers in five countries.

Our research study in partnership with Goldsmiths, University of London uncovered a global lifestyle trend: the desire for a – as we call it now – Seamless Life. In a Seamless Life, everything works how we want and expect it to. And while innovations help us manage and facilitate our life, we always remain the master of technology – and life – according to our personal flow. This is true in established markets like Germany, as well as in growing ones, like China.

After laying these foundations, we conducted a second study in 2017. It further confirms the world's desire for a Seamless Life, while also enhancing our understanding of the specific cultural and socio-economic trends driving the way people in different countries pursue it. You can find these insights in the market spotlight boxouts throughout this report.

This study provides a fascinating insight into how and why people want to embrace a new generation of intelligent technologies and innovation. In doing so, it gives us the clearest ever understanding of how we make a Seamless Life possible for everyone.

I hope you enjoy reading it.

A handwritten signature in blue ink, appearing to read 'C. Kilian', written in a cursive style.



Executive summary

“Why do people strive for a Seamless Life?” – the question at the heart of a consumer study conducted by Siemens Home Appliances in 2016, together with Goldsmiths, University of London. The representative, quantitative study features the views of more than 7,000 consumers worldwide, across Germany, France, the United Kingdom, Russia and China.

It uncovers and defines a newly integrated ecosystem of people, culture and technology, which forms the environment for a life that feels seamless. A key trend appears in the study as consumers universally indicate that they desire a truly integrated lifestyle with intelligent technology at its heart – this trend is what we call a Seamless Life.

In a Seamless Life, everything works the way you want and expect it to, and the way you are managing it leads you to the next, life-enhancing experience. This is enabled by connected technologies that help you manage the complexities of

everyday life for more control, self-optimisation and freedom.

Living a Seamless Life is about recognising that this enhanced lifestyle is a result of intelligent and inspiring behaviour and technology, aiming for continued excellence. As one study participant describes it: “Aspiring for a Seamless Life is about constantly seeking opportunities to live and flourish with a balanced portfolio of activities, with appropriate time for a variety of work, family life and personal projects. There is harmony in everything you do.”

Living a Seamless Life is desirable to more than 80% of respondents worldwide – but only achieved by about 20% today. Despite striving to live a truly integrated lifestyle, the gap to reality is vast. French (91%), German (85%) and Russian (80%) respondents wish for such a lifestyle, with only a low percentage of respondents mentioning that they actually manage to achieve it today.

Our first study reveals that successfully living a Seamless Life rests on five key pillars that need to be in balance:

Mastery: Living a Seamless Life doesn't happen by chance and is the product of motivation, intent and determination. People desire to be the master of their lives in an ever more complex world. 90% of respondents claim it's important to be the 'master of their own time'. Technological innovations are key to achieving this. Technology is the engine that drives new possibilities – present, but not obstructive or intrusive.

Resilience: Life is full of tribulations, but dealing with challenges in a positive and proactive manner is essential when aiming for self-optimisation. In fact, more than 80% of respondents say overcoming obstacles and adversity is part of striving for a Seamless Life.

Augmentation: Intelligent technologies augment our capabilities by allowing

81% of respondents desire to live a Seamless Life,
but only 22% feel they achieve this lifestyle today.

Figure 1: Respondents who desire a Seamless Life vs. respondents who are living a Seamless Life today.



2016 Study

day-to-day activities to be automated and enabling us to choose when we want control – wherever we are. There is strong evidence from our findings that people believe technology empowers them to become better in their everyday lives, a claim cited by 81% of respondents.

Flow: Managing daily life in a frictionless way is seen as highly desirable. And central to achieving a successful flow are connected products and devices. Within a Seamless Life technology has to be flawless and synchronised to provide enhanced experiences and enable life to become a series of small, personalised and optimised moments. Looking at the home, for example, if an appliance doesn't work well, it is a major source of frustration for the majority of respondents (80%).

Serendipity: Even the most Seamless Life holds its uncertainties. It's therefore crucial that daily routines are managed efficiently to streamline activities and

free up time for unexpected encounters, or opportunities that could ignite potential and fire imagination. This requires technology to be trustable and adaptable to human need, cited as the most important aspects of technology by 90% and 85% of respondents respectively.

Our second global study, conducted in 2017, features 6,000+ consumers worldwide, across the same countries, to better understand not just what makes up a Seamless Life, but how it comes to life in everyday household and lifestyle practices. Our research findings reveal Seamless Life readiness, awareness, and trends in everyday life across the globe.

The majority of respondents continue to view a Seamless Life as both aspirational and attractive. Three quarters (75%) agree that household appliances should, above all, save time in daily life, while 58% value innovative technologies that make everyday living easier.

People want frictionless and synchronised experiences throughout their daily routines. They want to be the master of their lives in a continually complex world. Our studies find that technological innovations are key to achieving this.

71% of respondents in our first study agree that having connected home appliances increases control and opens up new possibilities to do more in their lives. Home appliances today must accomplish more than just complete mundane routines and household chores – they need to do more than 'just the job'. Instead, they are expected to aid a flawless, frictionless lifestyle. Hence, people are becoming more passionate about the latest home appliance technologies, with 51% of respondents seeing them as a key element to a Seamless Life.

A Seamless Life



In a Seamless Life, everything works the way people want and expect it to, and the way people are managing it lets them have the next, life-enhancing experience. This is enabled by connected technologies that help them manage the complexities of everyday life with more control, self-optimisation and freedom.

“All aspects of life work together coherently without unnecessary friction or conflict.”

– Research participant

The drive for a Seamless Life is continual – innovations are a key enabler for achieving this desired way of living. As technology evolves, so too does the ease with which everything around us connects, helping to optimise our time. Our first study finds it is technology that gives consumers more control over their lives through simple, intelligent user interface design and innovative functionality. As one participant in the study describes it: “All aspects of life work together coherently without unnecessary friction or conflict.”

In a Seamless Life, connected technology is always present, but neither intrusive, nor obstructive. It is the door to new possibilities. Living a Seamless Life is not without adversity, but it is about dealing with these challenges, flexibly and efficiently, which makes for significant progress. When this is achieved, it allows people to be in control of their lives and be free to spend time doing the things that are important to them.

Our study reveals that a Seamless Life is built on five key pillars: Mastery, Resilience, Augmentation, Flow and Serendipity. When all of those are in balance, a Seamless Life unfolds.

While discussed separately, these pillars of a Seamless Life are all interdependent. In the following section, we explain more about each pillar, how it contributes to enable people’s new, desired way of life, and in what ways people across the world vary in their interpretation of it.

“Aspiring for a Seamless Life is about constantly seeking opportunities to live and flourish with a balanced portfolio of activities, with appropriate time for a variety of work, family life and personal projects. There is compatibility in everything you do.”

– Research participant

“It is about committing to life and being fearless and determined. Realising your potential in all endeavours and opening yourself up to new experiences.”

– Research participant

01. Mastery

Living a Seamless Life doesn't happen by chance and is the product of motivation, intent and determination. Mastery is a key component of people's motivation and drive.



Pursuing a Seamless Life should not limit your choices by enforcing a technologically-dependent lifestyle.

It is well understood in psychology that people who feel in control of their lives report better health, more contentment, and live longer. Our first study confirms that this is crucial to what people aspire to in the Seamless Life. Nine out of ten tell us it's important to be the 'master of their own time'. A mere 1% disagree.

As well as having control over their own time, people also want to master their home and they see that being achieved with technology. Performance of products is also rated as exceptionally important in order to enable mastery over their household, with 91% of respondents indicating technology is a key factor when making household appliance purchasing decisions.

If appliances fail to work in the desired way, a vast majority of respondents feel their day is flawed (80%). In the UK, 66% are not pleased when their appliances won't work in a seamless way, followed by Germany (73%) and France (79%), with dissatisfaction increasing to 90% and 91% for Chinese and Russian respondents. Technology must work at home and appliances are viewed as a key enabler for mastering everyday life.

Market Spotlight 2017

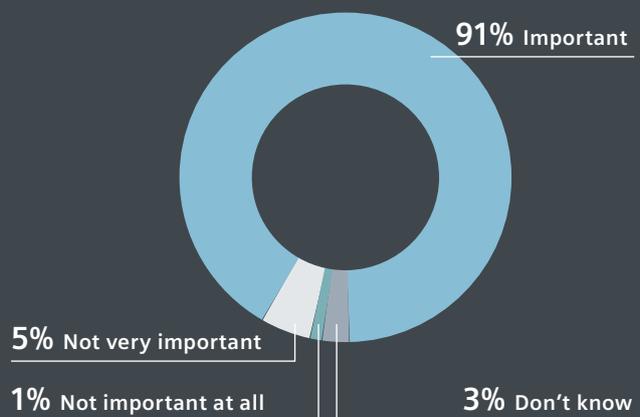
Our second study reveals how people across the world differ in their approach to mastery. Although those in the UK and Germany remain excited by innovations in the speed and functionality of emerging technologies, they are wary of intelligent or mobile features that may be intrusive or increase, rather than reduce, friction in their everyday lives.

Germans want mastery over technology – a third (34%) say they don't want autonomous devices that make decisions without them. In contrast, Russians are willing to sacrifice some mastery in order to have intelligent services that pick up everyday chores.

Three quarters (75%) say they want smart controls and devices that make decisions on their behalf, while 64% look for appliances that are at least partially autonomous and independent.

Figure 2: Research question – 'How important, if at all, is it to you that you are the master of your own time?'

90% of respondents expect to get exactly what they need when they need it from technology.



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02. Resilience

Life is full of tribulations, but overcoming obstacles and dealing with challenges in a positive and proactive manner is essential to a Seamless Life.



Resilience to adversity helps shape and frame the aspirational attitudes necessary for pursuing a Seamless Life.

Overcome obstacles and adversity – that is what 81% of respondents in our first study say they are willing to do to achieve this lifestyle.

But it is not just successfully dealing with adversity that is essential to achieving a Seamless Life. 89% of respondents, in all markets, agree that you should always strive to achieve your full potential and 74% agree that you should always aim for brilliance, not mediocrity. This sentiment is important everywhere, and is particularly pronounced in Russia where 91% agree with this no-compromise approach, followed by China (84%), France (76%), the UK (64%) and Germany (55%).

Resilience in a Seamless Life is also defined by an intelligent application of technologies to help manage and handle the complexities of modern life, in a proactive and efficient manner. When it comes to purchasing a new home appliance, one consideration in the purchase is about reducing complexity, with 33% of respondents making this selection. This requirement supports one objective: freeing the mind for higher ambitions and personal goals.

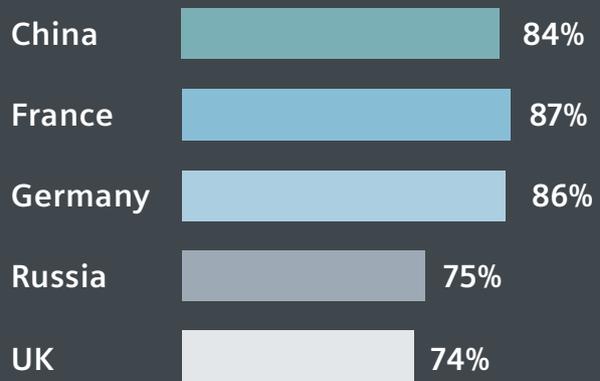
Market Spotlight 2017

Our second study reveals that resilience is a priority for French consumers, in particular. French respondents say they look to home technologies as a way of overcoming daily adversities and demonstrating resilience. Over half (51%) agree that intelligent technologies and networks in the home make life easier, compared to just 15% that disagree.

In the UK too, we see a focus on resilience, with respondents seeking to combat their daily stresses of work-life balance (30%) and housework (26%) through functional solutions and practical value in household appliances.

Figure 3: Country breakdown of respondents that agree 'overcoming obstacles and adversity is a part of striving for a Seamless Life'.

81% of respondents agree that overcoming obstacles and adversity is a part of striving for a Seamless Life.



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03. Augmentation

Intelligent innovations augment people's capabilities by letting day-to-day activities be automated, yet allow them to always stay in control. This makes the difference between a technology-enhanced and a technology-dependent lifestyle.



People are passionate about the power of innovation, but they want to actively decide when and how to use technology to be supported in living up to their ambitions.

In pursuing a Seamless Life, 55% of respondents in our first study say they want to work with technology, instead of having technology do the work for them (19%), or not working with it at all (18%). People are passionate about the power of innovation, but they want to actively decide when and how to use technology to support them in living up to their ambitions. A modern, connected way of working is most popular in Russia (67%) and least popular in Germany (45%).

There is strong evidence from our findings that people believe technology augments them in their everyday lives, cited by 81% of respondents; although there are national differences ranging from 64% in France to 71% in the UK, 82% in Germany, 92% in China and 93% in Russia.

In addition to empowerment, technology is seen as a key enabler to a more positive lifestyle, cited by more than 85% of respondents as helping to make their everyday lives better.

Reaching ambitions and goals starts with having an organised daily life. Therefore, people understand home appliances as one of the key drivers for their Seamless Life, helping them to excel in and outside of the home, and a fascination evolves. 51% of all respondents agree they feel passionate about buying innovative household appliances. This passion is driven by respondents in China (75%), Russia (69%), Germany (51%) and the UK (24%).

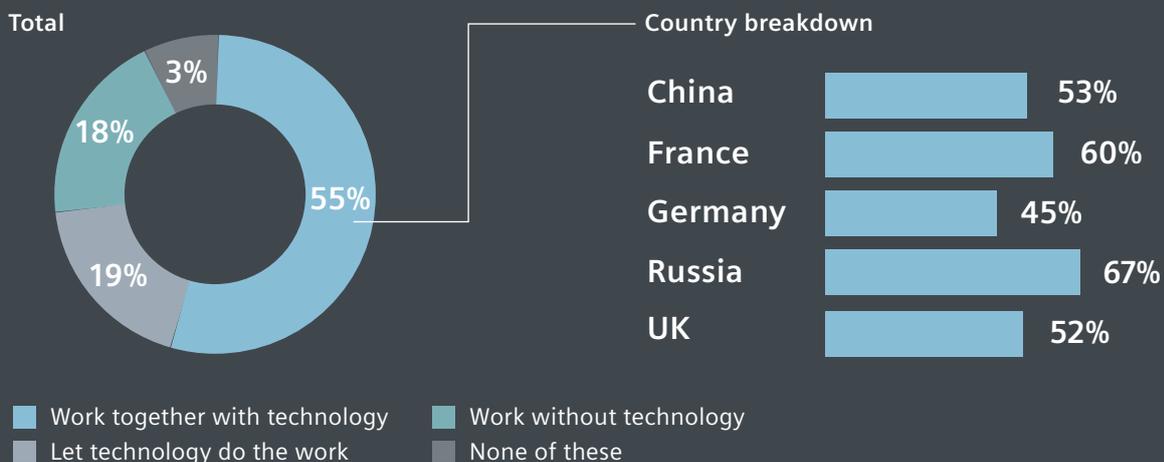
Market Spotlight 2017

Our second study confirms that those in Russia and China, especially, are inspired by a sense of ambition and optimism about the role intelligent technology can play in easing decision-making.

In Russia, four in five (80%) feel intelligent technologies and smart networking makes home life easier, while 68% want intelligent services that deliver augmentation by picking up everyday chores.

The study also reveals that the Chinese, more than any other nationality, welcome the role of technological augmentation in their everyday lives. Over two thirds (69%) demand household appliances with autonomous features, while 61% are happy for smart appliances to make decisions on their behalf. What's more, those in China are leading the way in looking beyond the home to mobile and smart virtual controls of household appliances.

Figure 4: How respondents most prefer to interact with technology on a day-to-day basis.



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04. Flow

Technology within a Seamless Life should be flawless and synchronised to provide enhanced experiences and enable life to become a composition of personalised, optimised moments.



Intuitive technology is a key driver for having a satisfying product experience and is essential to a Seamless Life.

Unsurprisingly, easy-to-use devices are crucial to a positive lifestyle for 93% of respondents in our first study.

Our research indicates that over half of respondents (55%) are looking for technologies that can anticipate their needs – a particularly interesting desire considering that people still demand to stay in full control of what technology should do for them (see “Augmentation”).

Regional differences are wide-ranging with Chinese (81%) looking for this type of technology the most, followed by France (54%), the UK (51%), Russia (50%) and Germany (37%).

What happens when intuitive devices and products offer people not only an enhanced experience, but also carve out some extra time in their day?

Our first study uncovers significant national differences in how people would use an extra 30 minutes in a day, freed up by the efficiencies of appliances. Over half of respondents say time socialising with friends and family is the most important. The next most popular choice differs by market with Chinese (47%) and French (29%) opting for exercise, British (31%) and Germans (28%) wanting to relax more, e.g. sleep, and the Russians choosing to learn new skills (34%).

Market Spotlight 2017

Our second study expands on these findings, revealing that flow is critical for Chinese (75%) and German (80%) participants who agree that smart appliances should function fast, smoothly and flexibly as a priority. The vast majority (95%) of Chinese participants also agree with the desire for more intelligent services that relieve them of everyday chores.

Meanwhile, flow and augmentation combine for French consumers in pursuit of more meaningful, personal and empathetic household experiences, particularly in the kitchen. More than three quarters (80%) believe the role of household appliances is to make everyday life easier and free up time for life’s pleasures, like eating with friends and family. Cooking (38%) comes in just behind long walks (42%) as an activity that provides escape and a sense of flow in everyday life.

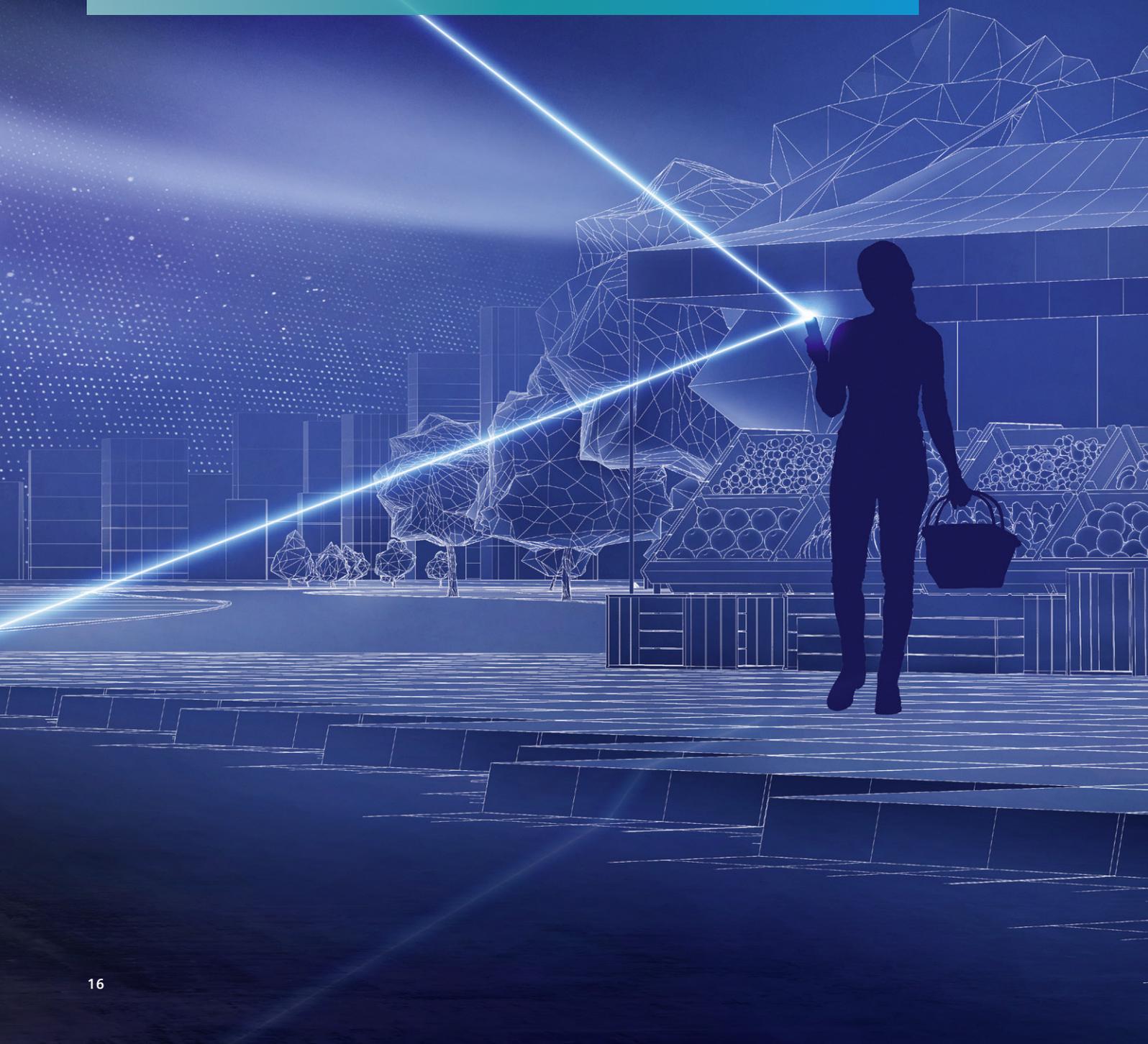
Figure 5: An extra 30 minutes a day would be spent doing the following activities:

Socialising		Exercising		Relaxing		Learning new skills	
All respondents	51%	All respondents	31%	All respondents	30%	All respondents	28%
China	52%	China	47%	China	39%	China	43%
France	50%	France	29%	France	22%	France	28%
Germany	57%	Germany	27%	Germany	28%	Germany	19%
Russia	55%	Russia	25%	Russia	31%	Russia	34%
UK	43%	UK	26%	UK	31%	UK	19%

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05. Serendipity

Even the most Seamless Life holds its uncertainties. It's therefore crucial that daily routines are managed efficiently to streamline activities and free up time for new opportunities and encountering the extraordinary.



Encountering the extraordinary is the dream that more and more people want to pursue.

Chance encounters and new possibilities are accentuated by emerging technologies on a foundation of good organisation, strategic planning and performance. Two-thirds of respondents (61%) in our first study agree that technology helps optimise daily activities, while 58% say it helps them stay connected to what is important. This enables them to react spontaneously and exploit upcoming opportunities.

Spontaneous behaviour cannot easily be adopted by everybody, and when put in that situation, some people will feel pressured, leading them to busier schedules and less room for open-ended adventures. It's no wonder that 69% of the study respondents want to be surprised and delighted by technology – making people feel more spontaneous, engaged and open. Encountering the extraordinary is the dream that more and more people want to pursue.

When it comes to household appliances, our findings indicate serendipity is enabled through increasing the speed of appliances, to open up opportunities and free up time for more personal goals. Almost 71% of respondents agree that connectivity increases control and opens up possibilities to do more in their lives. This is most prevalent in China, where 94% agree, and in Russia, where it is 87%, than in Western Europe, which is more muted (France 59%, the UK 58%, and Germany 57%).

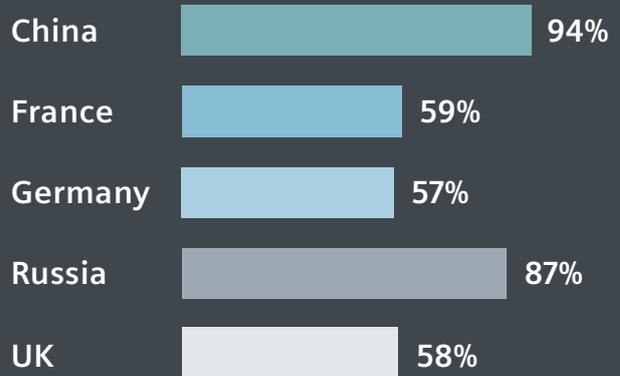
Market Spotlight 2017

Our second study digs deeper, revealing that when it comes to serendipitous possibilities, those in the UK are looking for these outside the workplace – only 4% of UK participants report they have too little time in their lives for jobs and work. UK participants also say they value physical connections more than virtual ones.

Likewise, for German participants, when it comes to serendipity there is an emphasis on the role of technology in opening up more human connections, while Russians are looking to their household appliances to save time (92%) and free up space for serendipity and more meaningful lives.

Figure 6: Country breakdown of respondents that agree 'connectivity in household appliances increases control and opens up new possibilities'.

71% of respondents agree that connectivity in household appliances increases control and opens up new possibilities.



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Pioneering a Seamless Life

The ones that go first.

Our studies don't just discover an overwhelming global desire for a Seamless Life and how different people around the world pursue it.

They also identify a set of individuals for whom living a Seamless Life is desired even more and is closer to becoming reality. Connectivity, intelligent technology and aesthetically pleasing design are inherently part of their lives. The way they face challenges head-on, by harnessing the power of innovative products to give them greater freedom and choice, is almost part of their DNA.

These individuals make up 22% of the respondents in our first study and are defined by attitudes and standards, not demographics. They can be found across varied sectors and professions – but are bound by their aspirations. They seek to have it all in work, social life and home, and are using technology to help them get it. They are striving harder for a Seamless Life and are more enthusiastic about the transformative potential of connectivity and innovations. Subsequently, technology that can help create experiences for a positive lifestyle is rated 10% more important by this segment, compared to the general population.

The attitude of these ambitious individuals is also proven to be more open to new ideas in general. For example,

across all markets they are more likely to use 30 extra minutes to learn new skills for self-optimisation, cited by 39% compared to 28% of the respondents, proving the notion that they are already highly resilient.

85% of respondents in the pioneering segment are enthusiastic about the possibilities of connectivity vs. 71% in the general population.

This subset of individuals will be the driving force towards a Seamless Life, becoming early adopters of new technology, opinion leaders, adapting to this new lifestyle and using everything from their coffee machine playlist to their high-speed washing machine to lead the way.

The sum of these attitudes makes these individuals ready for the next generation of intelligent home appliances.



Siemens Home Appliances enable a Seamless Life.

It is the passion and need for excellence specifically demanded by these pioneering individuals that set the bar for innovations at Siemens Home Appliances. Through our rich legacy of German engineering, foresightedness and innovation in leading technology as well as refined design, we enable a Seamless Life for everyone striving for it. The potential of an innovative product to become successful depends on how well it responds to the demands of its time.

This is why we, at Siemens Home Appliances, continuously investigate consumers' needs and uncover global trends that form the basis for the next exciting product innovation.

Supporting and strengthening consumers in day-to-day tasks, and enabling them to spend time on what they strive for is our main priority.

We know that our consumers will not compromise when it comes to appliances that enhance their lifestyles. This is why we also concentrate on intelligent, high-performance products and features with intuitive user interfaces that give full control over speed and time in daily routines, as well as allowing self-expression.

A full range of connected Siemens Home Appliances is already paving the way today towards leading a Seamless Life. We are also constantly enhancing our partner network to

offer services both inside and outside the home, including our Home Connect App. This can now be used to link appliances wirelessly with devices from different manufacturers, helping to turn the whole house into a fully connected home.

This allows our consumers to manage their household from wherever they are, whatever they're doing, supporting a perfect flow in their daily lives and enhancing their lifestyle with intelligent and exciting possibilities.

The potential of an innovative product to become successful depends on how well it responds to the demands of its time.

As Siemens Home Appliances, our aim is to deliver innovative products and services that go beyond their traditional functions to meet the shifting needs of our customers. That way, we can help everyone, everywhere live the Seamless Life they desire.

About Siemens Home Appliances

Siemens is a premium, German household appliance brand, which sets new global standards in terms of technology, innovation and design for home appliances. Through its connected product portfolio, Siemens enables a seamless world of exciting possibilities for its consumers. Besides its strong focus on refined built-in appliances, the product range encompasses stand-alone appliances in the areas of cooking, laundry care, refrigeration, freezing and dish care as well as consumer products for coffee making and vacuum cleaning. Siemens has built a strong heritage of performance, innovation, quality, and resource-efficiency that have yielded prestigious awards such as the iF Design Award and the Red Dot Award. The brand is run under the umbrella of BSH Hausgeräte GmbH, based in Munich, Germany.

About Goldsmiths, University of London

Founded in 1891, Goldsmiths, University of London is an institution with a rich academic history, known for its creative approach. Goldsmiths has been named one of the United Kingdom's top five most creative universities in the "Which? University Student Survey 2016". Goldsmiths research shapes the future, changes lives and is at the fore-front of creative practice, with almost three-quarters of research rated internationally excellent or world-leading by the 2014 Research Excellence Framework.

The Institute of Management Studies (IMS) fuses Goldsmiths' academic rigour and creative culture with industry-informed research, interactive group learning and core strengths in psychology, leadership, consumer behaviour, emerging technologies, and innovation.

Methodology

This quantitative study was conducted by Goldsmiths, University of London. All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 7,244 adults. (China n=1,061, France n=1,009, Germany n=2,098; Russia n=1,014; UK=2,062). Fieldwork was undertaken between July – August 2016. The survey was carried out online, including 20 multiple choice questions and one open question. The figures have been weighted on a country-by-country basis and are representative of all adults (aged 18+) in each country.

Our second quantitative study was conducted in 2017 by Goldsmiths, University of London. All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 6,175 adults across China, France, Germany, Russia and the UK. Fieldwork was undertaken between 10th July – 9th August 2017. The survey was carried out online, including 12 multiple choice questions. The figures have been weighted and are representative of all adults (aged 18+) in each country.

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