

Smarter and More Connected

The emerging landscape of IoT and connected devices

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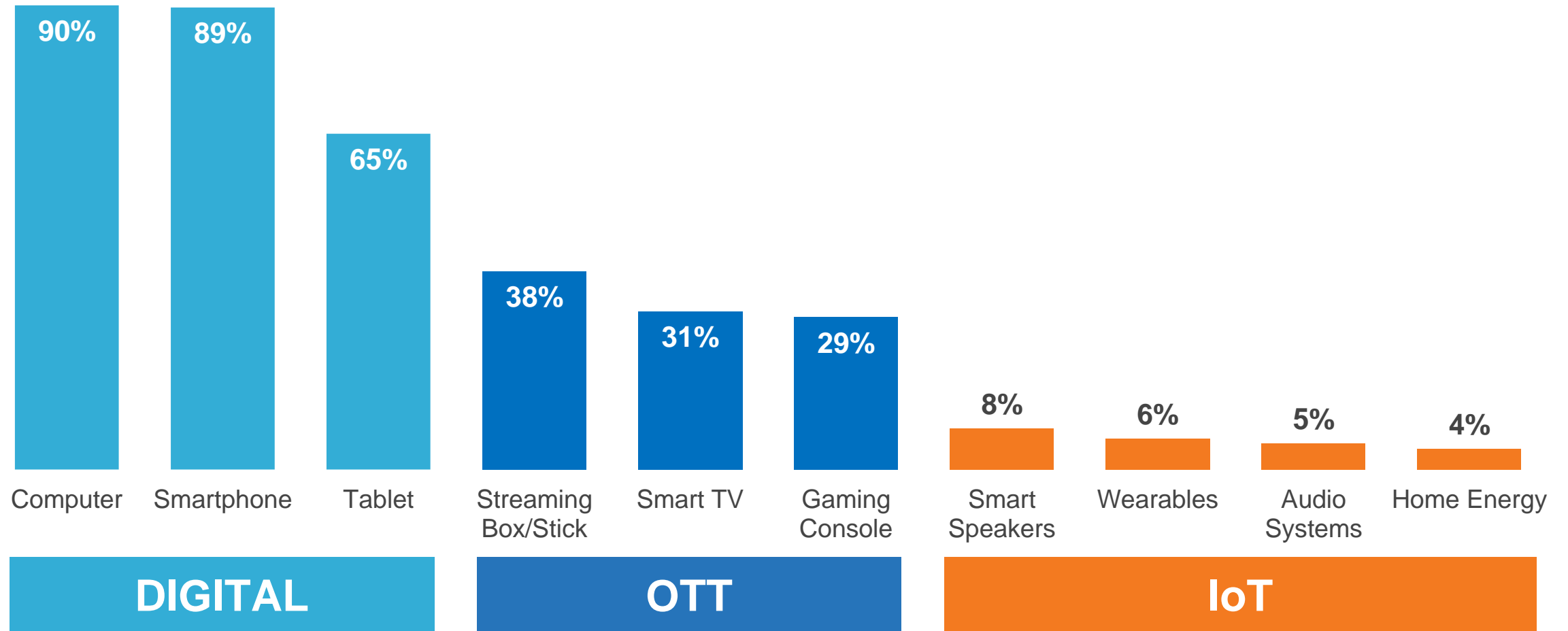
The Average U.S.
Connected Home Has

8.5

Internet-Connected
Devices

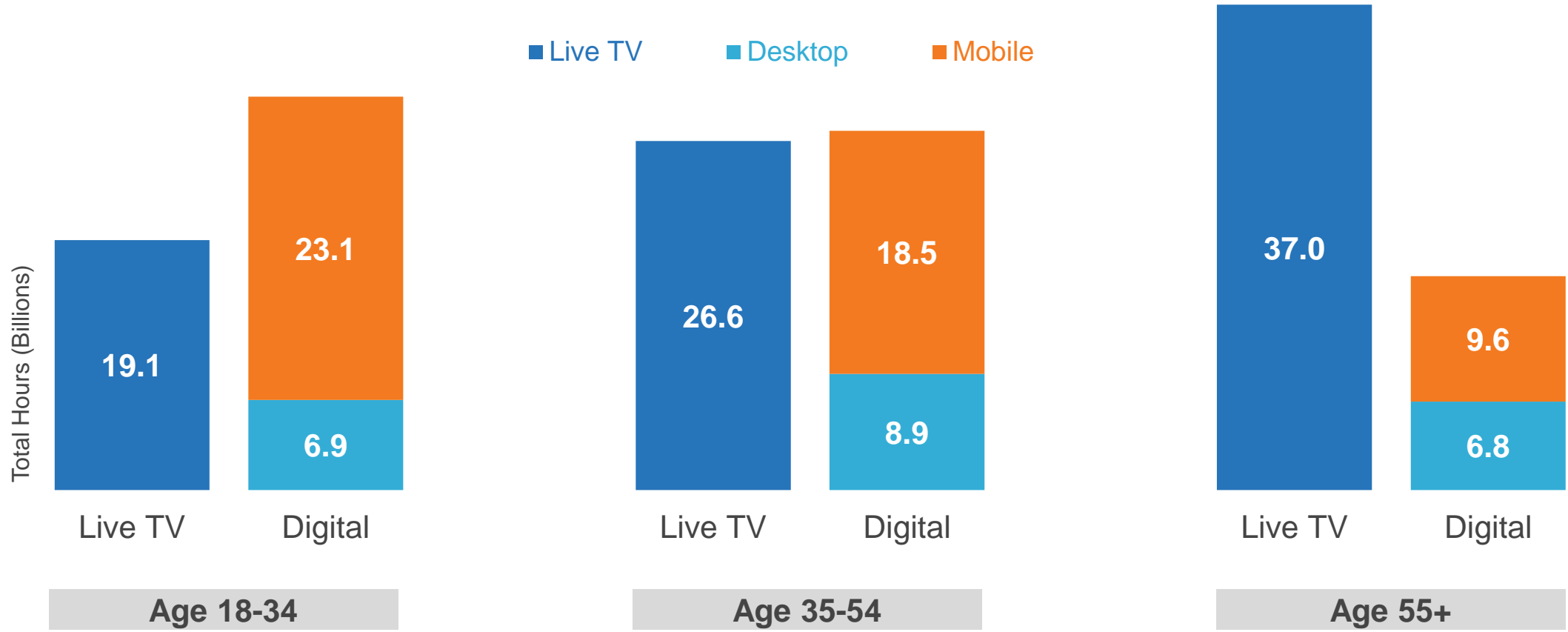
The modern living room experience features a multitude of connected devices, including significant innovation and adoption in the **OTT** and **IoT** landscape

Media Device Penetration Among U.S. Wi-Fi Households



Millennials and Gen Xers spend more time on digital media than watching live TV, a sign of shifting media consumption dynamics

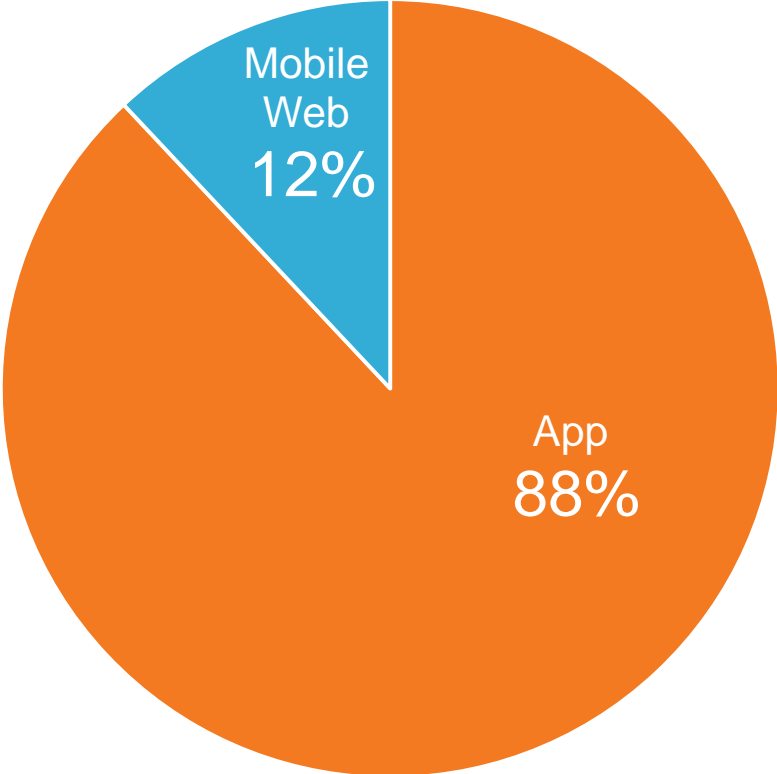
Billions of Hours Spent on Platform by Demographics



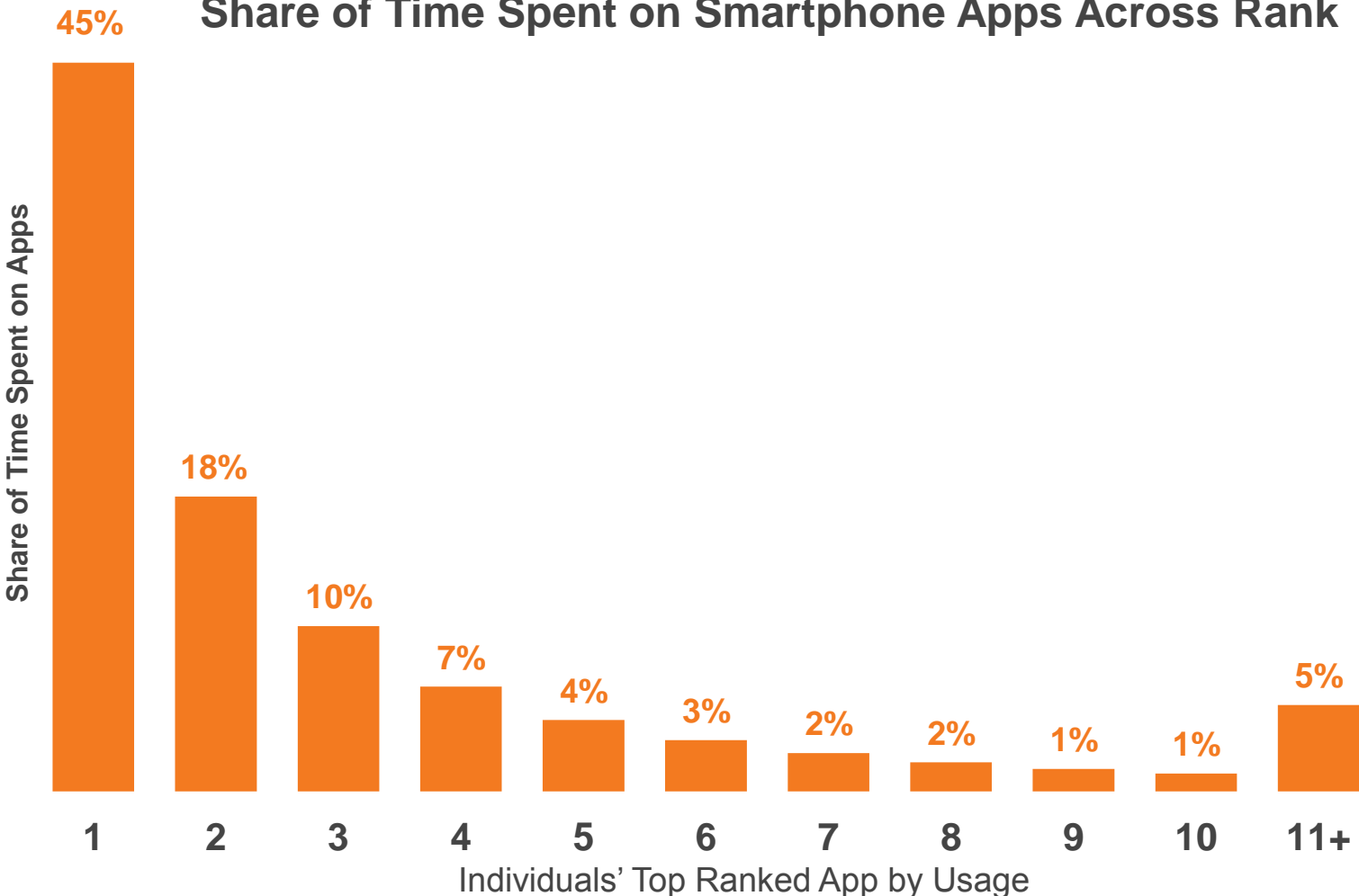
Source: comScore Xmedia (Custom) and Media Metrix Multi-Platform, U.S., Q4 2016
 * Time spent on desktop and mobile accounts for all content consumption on these devices (i.e. websites and apps), not just digital video.

Smartphone users use an average of **27 apps** per month but spend almost **half their time on their #1 most used app** and 9 out of 10 minutes within their Top 5

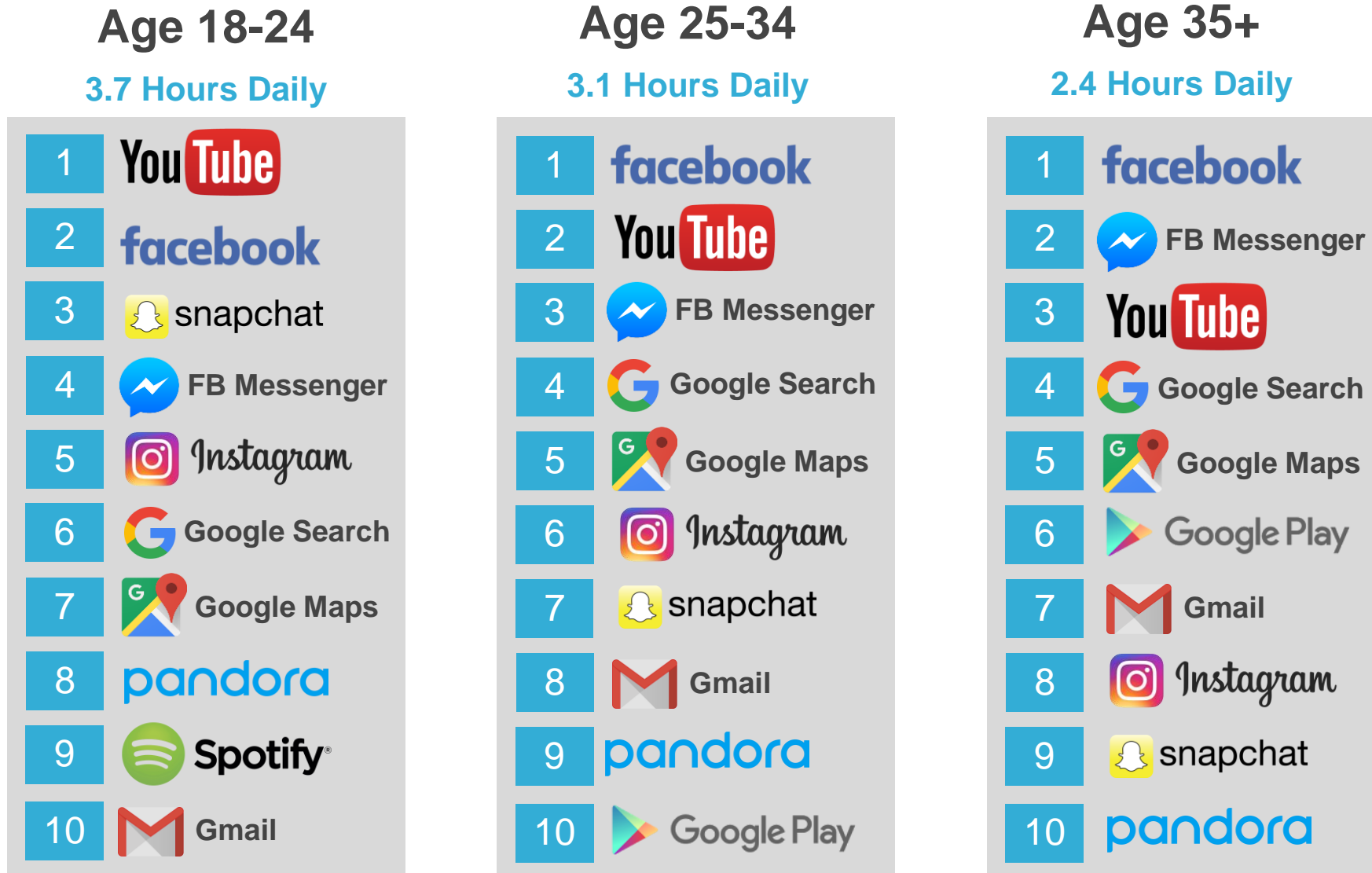
Share of Smartphone Time



Share of Time Spent on Smartphone Apps Across Rank

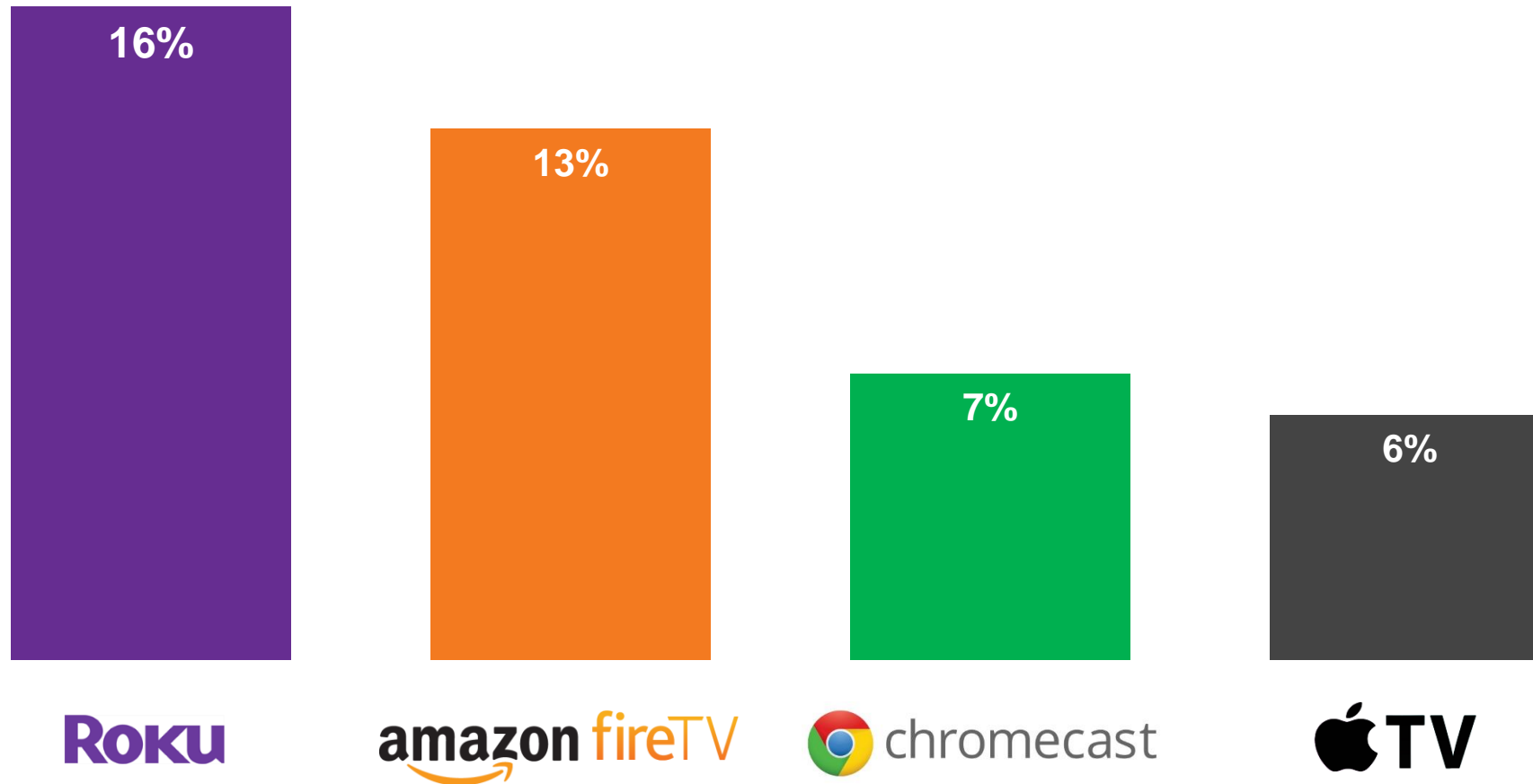


The top apps vary by age group, with **Snapchat**, **Instagram** and **Spotify** falling much higher on the list among younger Millennials



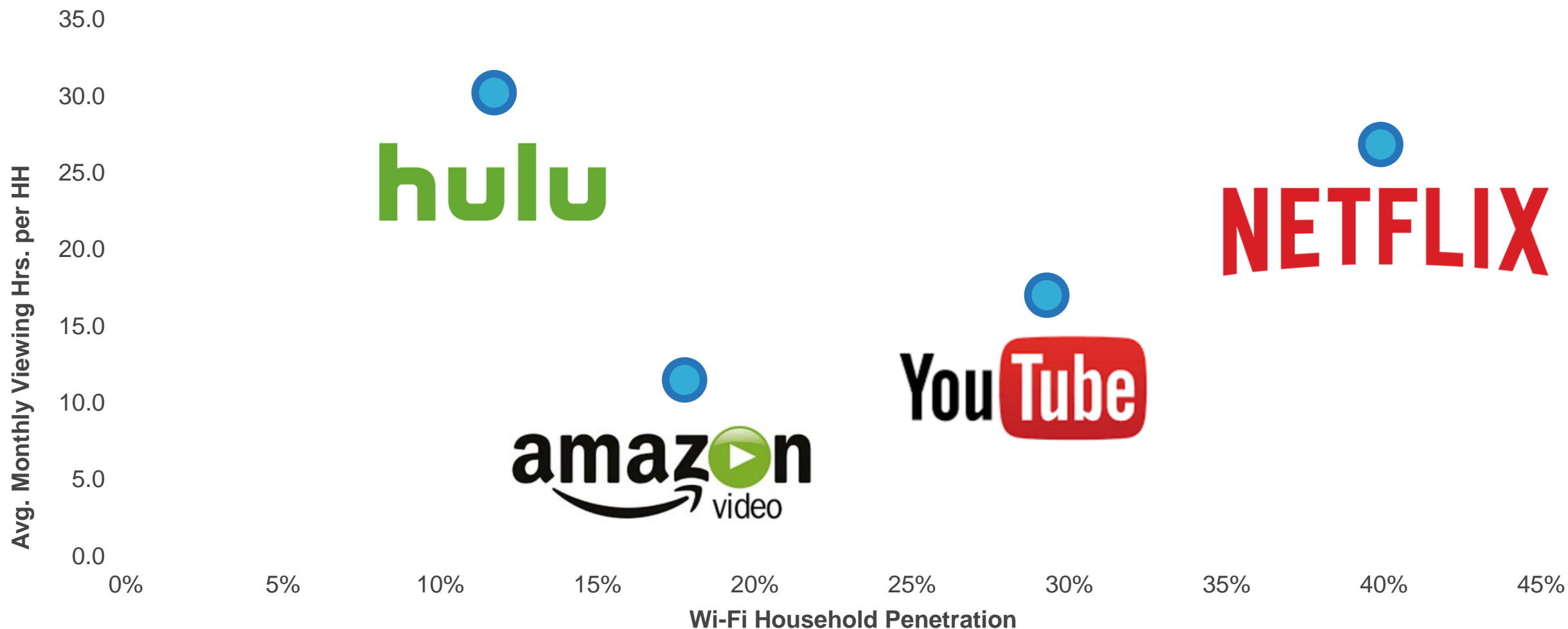
Streaming video devices are propelling the over-the-top (OTT) category forward, with **Roku** leading Amazon, Google and Apple in device penetration

TV Streaming Boxes/Sticks: Penetration of U.S. Wi-Fi Households



Netflix leads the major over-the-top streaming services in household penetration but **Hulu** boasts very strong viewing engagement

Selected Over-the-Top (OTT) Streaming Services by Wi-Fi Household Penetration & Engagement





The Average
U.S. Smart Home has

1.5

iOT Devices

The Smart Home

IoT households are gaining traction in the U.S.



1 of 5

U.S. connected homes has an IoT device

IoT devices are ACTIVE

18 days

per month on average



The average IoT home has



1.5
Devices

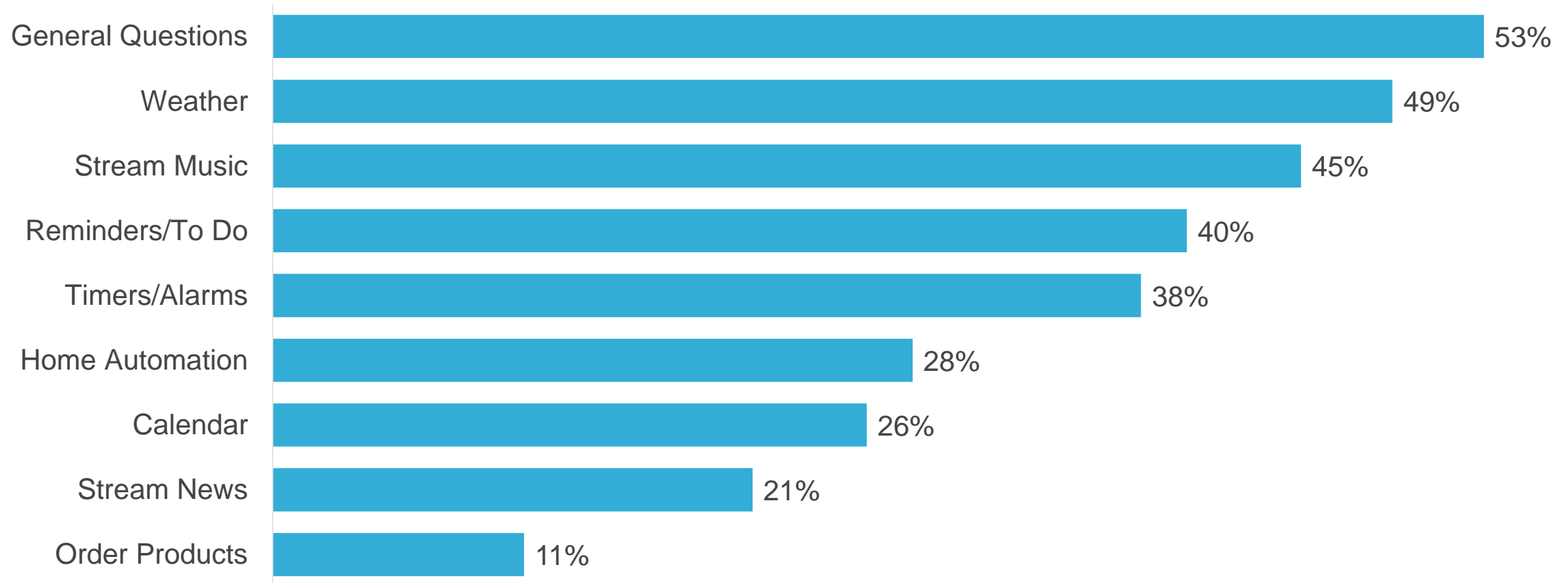
Smart Speakers

Are the most prevalent IoT device category



Americans are using **smart speakers** for a range of daily behaviors, for entertainment, and even to buy things

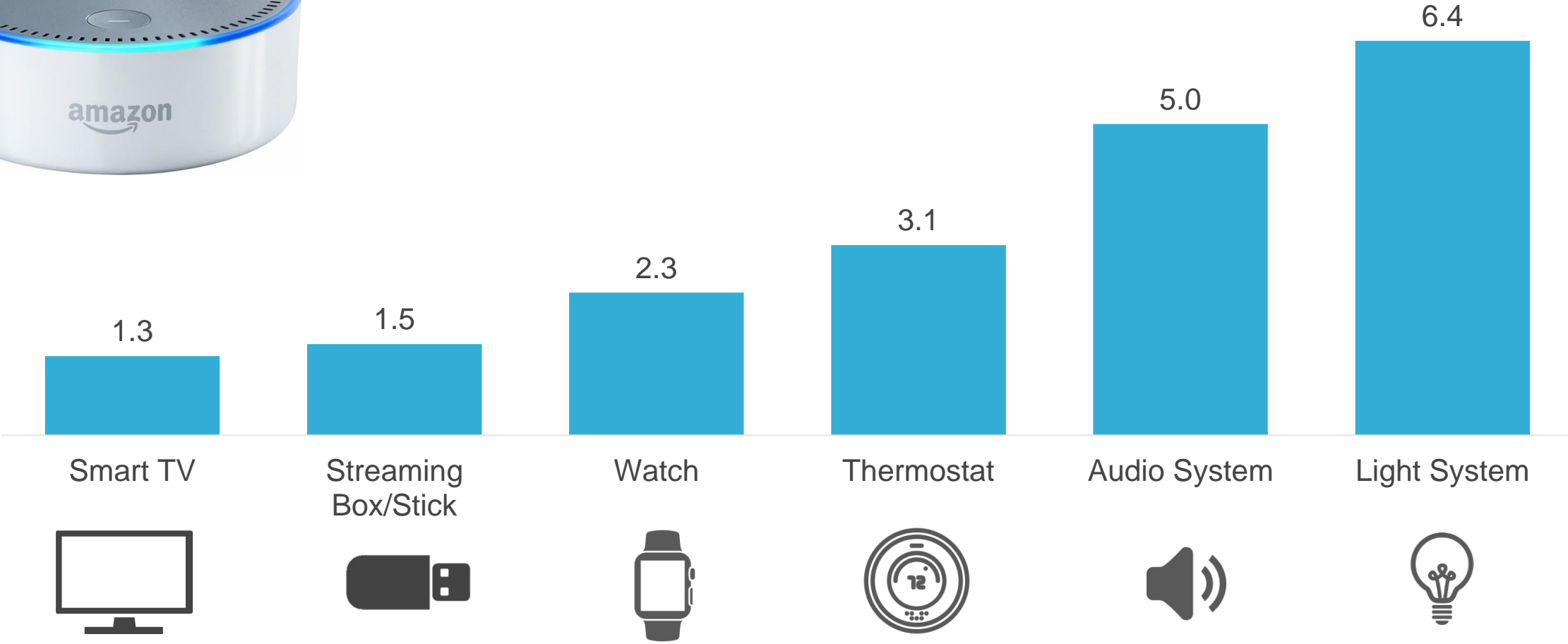
Top Use Cases for Smart Speakers Among Households Owning the Device



Echo Dot homes have a much higher likelihood of using other smart devices – particularly thermostats, audio systems and light systems



Echo Dot Household Cross-Usage Index for Other Connected Device Categories



Pondering the Future of IoT

Every digital device
will be
connected

Connection =
better functionality
AND
more data

Path of
IoT innovation is
limitless

Homes today =
microcosm of future
cities, world