

Philips Meaningful Innovation Index



Making Innovation Matter: The People's View



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I. Foreword

We all live in a world that is adapting and innovating at a very fast pace. The market, the wishes of the customer, the needs of societies – all of these things are changing rapidly. Philips needs to continually renew and innovate to lead the charge in technological development.

Innovation is the lifeblood of Philips as we improve the lives of people around the world by delivering meaningful innovative solutions that will contribute to a healthier, more sustainable world. Our product portfolio supports people in dealing with important global trends such as the ageing of the population, urbanization and the desire for an increasingly healthy lifestyle.

The Philips Meaningful Innovation Index is the latest in a series of Indices developed by The Philips Center for Health and Well-Being that will help us plan and develop appropriate solutions. It looks at people's affinity, experience, attitude towards technology – in other words, what does meaningful innovation mean to people.

Philips wanted to understand more fully where all these innovations are taking us. Is all new technology adding real value to our lives? Are we seeing innovations in areas that really matter to us? The Center commissioned the multi-country Index in five countries: USA, Russia, China, the Kingdom of Saudi Arabia (KSA) and the Netherlands. This report contains the key findings from the survey and seeks to answer those questions.

I believe that this understanding will enable us to continue to pioneer products, services and game-changing innovations that will help people, communities, healthcare systems, governments, and future generations address the critical issues surrounding how we live, how content we are, and our own roles in those dimensions of our lives.



Jim Andrew
Philips Chief Strategy and Innovation Officer

II. Executive Summary

The field of technology continues to be an exciting space for people in various countries across the world. Most believe it has had a positive impact on their lives and that some innovations have been meaningful. However, across all markets included in our survey, there is an appetite for future innovations to go beyond creating technology for technology's sake, instead aiming to make a difference in people's everyday lives.

The Meaningful Innovation Index has identified a technology innovation gap. The study weighed satisfaction with current innovations by what is important in people's lives and only 54% of people surveyed were satisfied with existing innovations in the areas they considered to be the most important to them.

Country to country, across ages and life stages, the top 5 areas important to people are consistent; being happy, feeling safe, looking after the health of my family, sleeping well and being comfortable in my home.

Despite age differences, people across markets agree that innovation in 10 key areas of life – protecting the environment, saving money, stress relief, living independently as one ages, education, preventative health (preventing disease and illness), education, medical treatment, medical diagnosis, workplace efficiency and saving time – would be most meaningful.

Part of delivering technology that makes a real difference is making it accessible. This is particularly true for citizens in developing markets like China, Russia and the Kingdom of Saudi Arabia (KSA). When asked what type of invention would improve their lives the most, citizens in these markets generally call for the ability to own already devices in existence, or improvements on current technology. Consequently, to better serve these citizens, this may involve delivering technology that can be scalable, or simply producing more cost-efficient technology.

When we look at satisfaction with current technology available across multiple areas of people's everyday lives, the area of communication generates the highest levels of

satisfaction. This is likely driven by the proliferation of mobile phones and increasing reliance on these products. When we look at the Index across markets, unsurprisingly Americans, who have high levels of access to technology of all forms, have the highest Meaningful Innovation Index score (74%). Russian citizens have the lowest score with 41%.

Technology for preventative health as well as to improve and maintain health is strongly prioritized. 88% of people are looking for companies to create innovations that will help them to look after the health of their family. The same figure applies to products related to medical treatment and preventative health.

Affinity to technology is similar across the age-groups. 55% of Seniors (65+) stated they have adopted a new technology that has changed their life, compared to 56% of Youth (18-24) and 67% of Seniors felt that technology had made their lives better, compared to 74% of Youth. These groups are also equally concerned about the downsides of innovation, stating that the proliferation of social media such as Facebook and Twitter reducing their privacy (45%).

To prioritize where we focus future innovations in order to deliver innovation that is truly meaningful, we examine what is important in people's lives by accessing their net satisfaction with each area¹. Through this analysis a number of areas are identified as areas in need of innovation. These priority areas include: protecting the environment, saving money, living independently as people age, stress relief, and education. Additionally, innovations in health and well-being are needed and expected, including products for preventative health and to diagnose and treat medical conditions.

Ultimately, this survey shows us that while people feel the benefits that the last few decades of constant evolutions in technology have given us, there is still room to do more. By companies focusing on developing innovations in the priority areas identified here, we will deliver meaningful innovation that makes a difference in people's everyday lives.

¹ Net Satisfaction = Very Satisfied minus Dissatisfied and Neutral (Top 1 Box minus Bottom 3 Box)

III. Survey Methodology and Results

The Overall Approach

This report is based on samples taken from five markets across the globe. Sample sizes, methodology, and weighting were determined on a country-by-country basis to best reflect the demographic make-up in that country. These differences should be taken into

consideration when making cross market comparisons. Where global averages are presented, they are simple averages of the country means and are not weighted by sample or population size.

Country	Methodology	Sample Size
The Americas		
US	Telephone	1,001
Europe		
Netherlands	Telephone	1,029
Russia	Telephone	1,081
Middle East		
Kingdom of Saudi Arabia	Face-to-face	1,000
Asia		
China	Telephone	1,126

Table I

Demographic Breakdown

	Men	Women	18-24	25-39	40-64	65+
COMBINED TOTAL ²	50%	50%	14%	31%	40%	14%
The Americas						
US	49%	51%	13%	26%	44%	17%
Europe						
Netherlands	49%	51%	11%	23%	46%	21%
Russia	45%	55%	12%	31%	42%	16%
Middle East						
Kingdom of Saudi Arabia	56%	44%	22%	45%	29%	5%
Asia						
China	51%	49%	15%	32%	40%	12%

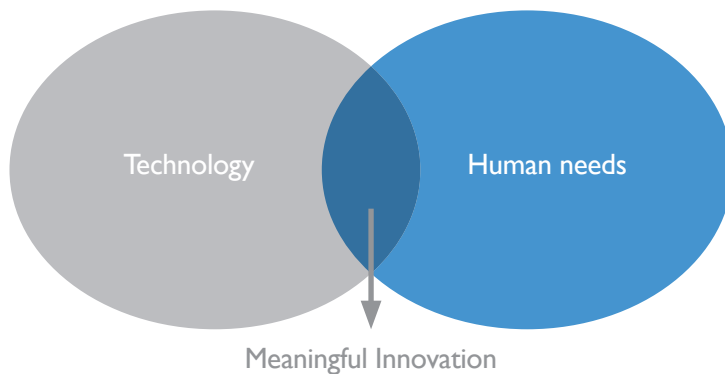
Table 2

² The sample is large enough to allow for sub-group analysis.

Notes On Data Within The Report

- Combined total sample and country comparisons are provided throughout this report. The combined total is an un-weighted average of all markets that asked a question and/or response option.
- Throughout the analysis, significant differences have been identified and highlighted across age, lifestyle, and market / region, where relevant.
 - For example, markets highlighted with **green** are significantly higher than the combined total, while markets highlighted in **red** are significantly below the combined total.
- Throughout the report, D/K (Don't know) answer options have been excluded. As a result, percentages may not always add to 100.
- It should be noted that one should be careful when drawing firm hypotheses where only minor differences exist among markets due to slight differences in sampling across markets included in this report.

IV. Life: What is Important to Us?



To identify what would represent meaningful innovation to people, we must first determine which areas of life are most important to them and what their needs are. Accordingly, through our survey we gauged the importance of 24 areas of life that fall into three distinct categories:

- *Enjoying Life Attributes:* Being happy, personal relationships, communication with one's family and friends, entertainment, one's home being comfortable to live in, living independently as one ages, and being an active part of one's local community.
- *Living Well Attributes:* Looking one's best, sleeping well, saving time, saving money, feeling safe where one lives, attaining an education, having access to information, workplace efficiency, protecting the environment and the ability to de-stress.
- *Feeling Healthy Attributes:* Staying fit and active, living a healthy lifestyle, eating healthily, looking after the health of one's family, preventative health (preventing disease and illness), and receiving medical diagnosis and/or treatment.

Across markets, five areas of life consistently rank as most important: being happy, sleeping well, their home being comfortable to live in, a sense of safety in their home environment, and communication with friends and family. While the majority of these areas belong to the Enjoying Life attributes category, our surveyed population also note the importance of several Living Well and Feeling Healthy Attributes in their everyday lives.

People Value Happiness, Health and Safety Most

The five areas of life that more of our overall population surveyed say are important are being happy, sleeping well, their home being comfortable to live in, a sense of safety in their home environment, and communication with friends and family. Many of these areas relate to basic human needs that affect our overall well-being.

In fact, over nine-in-ten (94%) of the overall population surveyed say achieving happiness is important. All areas relating to health, in particular physical health, follow closely behind the top five, with an average of 89% of the population surveyed saying these are important areas in their lives.

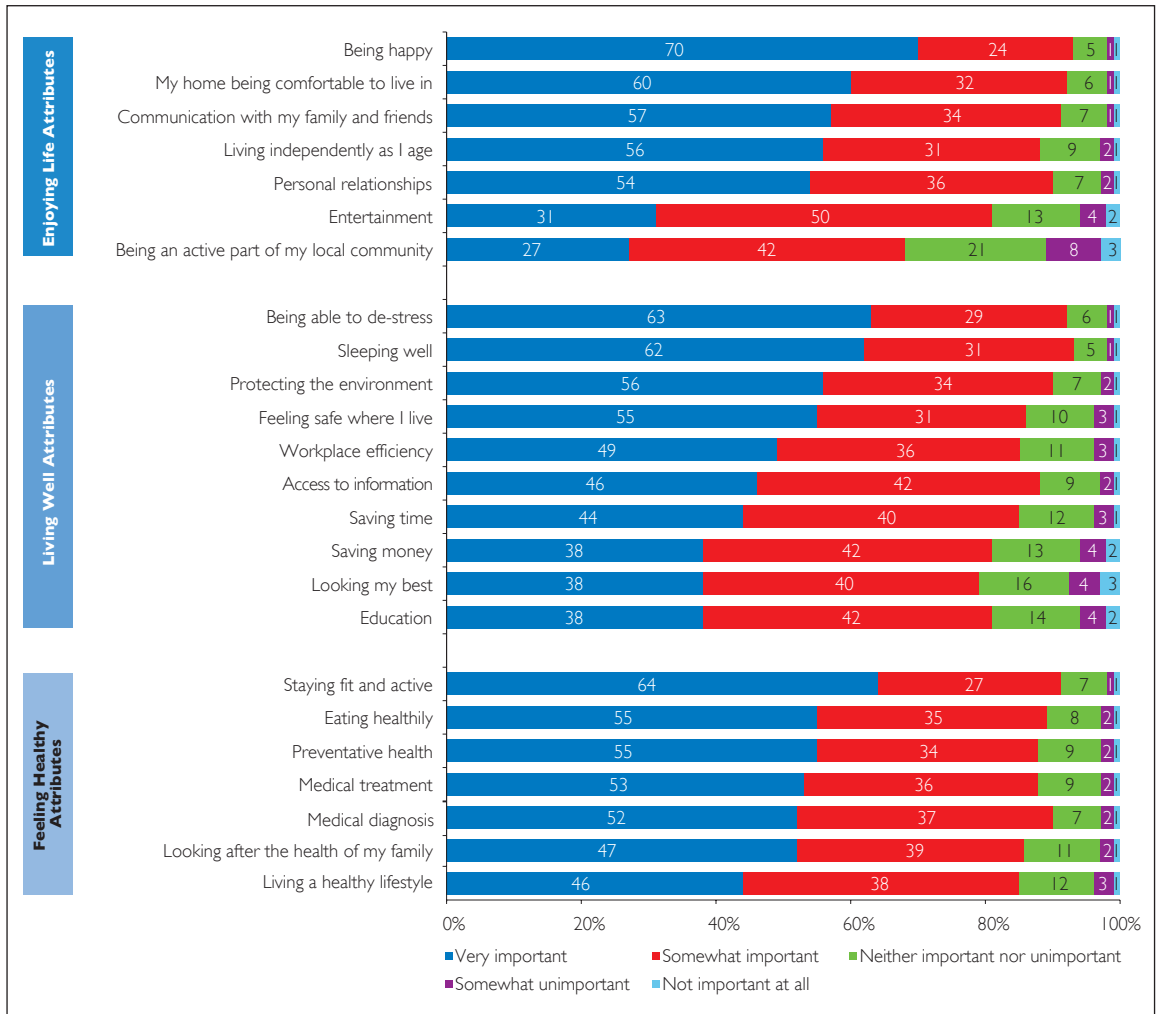


Figure 1: How important are each of the areas listed below in your life?

Enjoying Life Attributes

Across all markets, being happy is considered the most important or second most important area of life related to 'Enjoying Life'. Comfort at home and maintaining personal relationships by communicating with family and friends are also consistently among the

most important areas of life for all markets. Citizens of the United States and KSA are significantly more likely than the overall population to place importance on actively participating in their community.

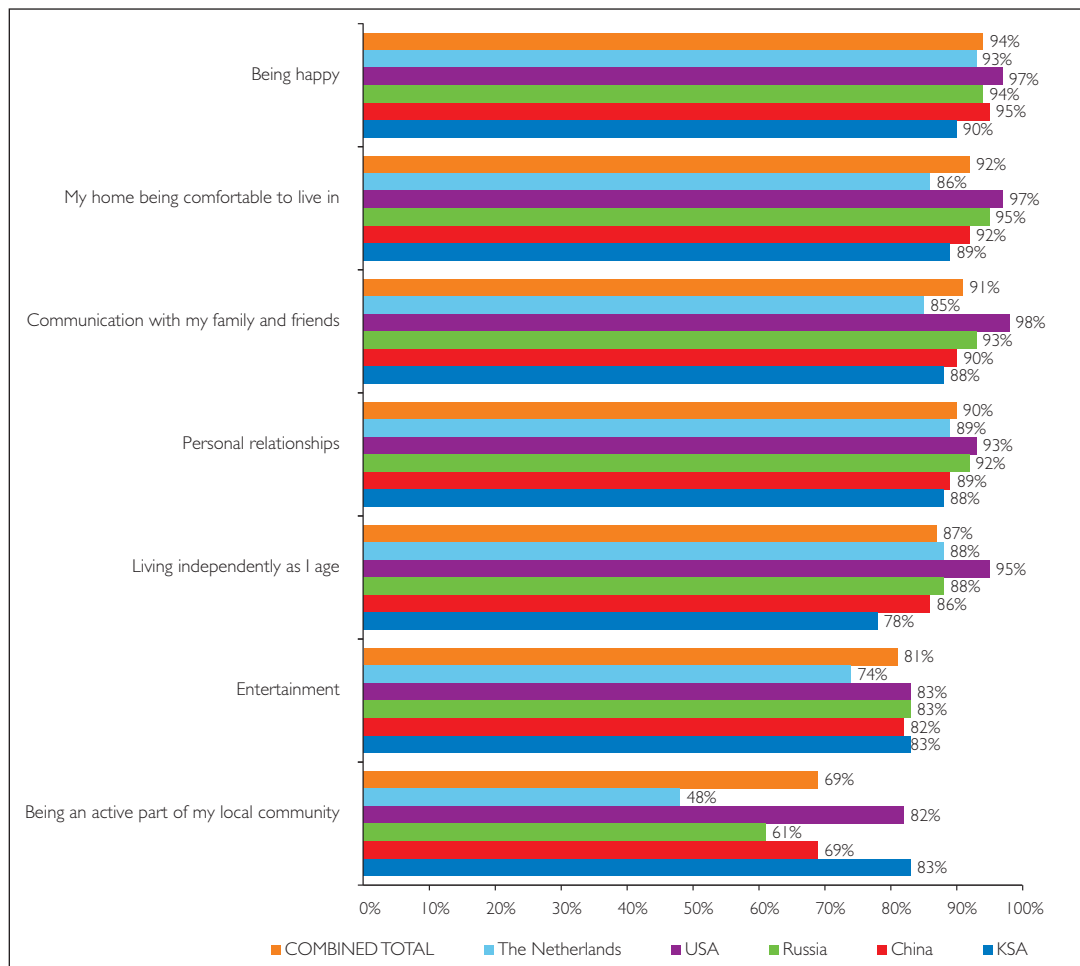


Figure 2: How important are each of the areas listed below in your life? (TOP 2 BOX: Very important/somewhat important)

Living Well Attributes

Getting a Good Night's Sleep and Feeling Safe are the Most Important Areas Related to Living Well for Global Citizens

People across markets agree on the importance of getting a good night's sleep and feeling safe in their neighborhood. However, Americans are significantly more likely than those in other markets surveyed to

find saving money important, potentially reflective of the current economic uncertainty. Similarly, Chinese citizens are more likely to place importance on workplace efficiency than those in other markets.

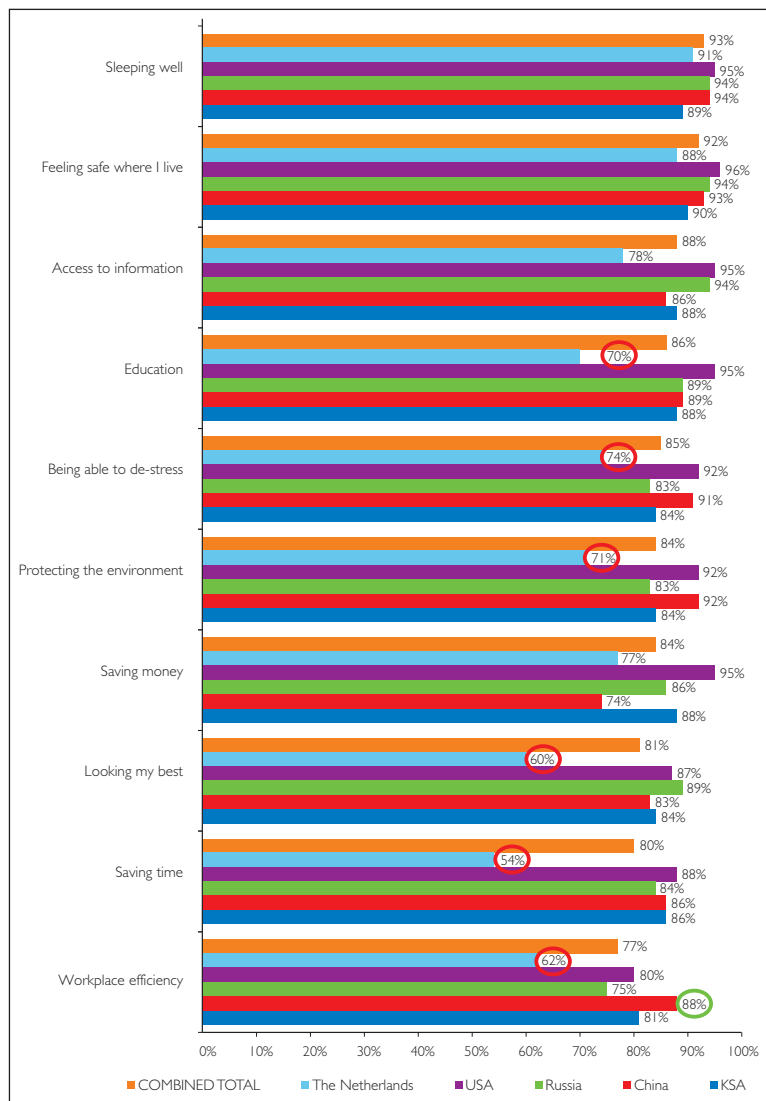


Figure 3: How important are each of the areas listed below in your life? (TOP 2 BOX:Very important/somewhat important)

Feeling Healthy Attributes

Citizens from Russia and KSA Place Greater Importance on Their Families' Health Than Their Personal Health; US, Dutch and Chinese Citizens Focus on Living a Healthy Lifestyle

In terms of health, people across the markets surveyed place high importance on being able to look after their family's health and living a healthy lifestyle. Alongside living a healthy lifestyle, US citizens also place high importance on preventative health, while Dutch citizens feel staying fit and active is key, and Chinese citizens believe eating healthy is important. These areas related

to health, may be indicative of how citizens in these respective markets believe one lives a healthy lifestyle.

Interestingly, citizens of the Netherlands, Russia, China and KSA, rank medical diagnosis the least important aspect of their lives when it comes to those aspects that relate to feeling healthy.

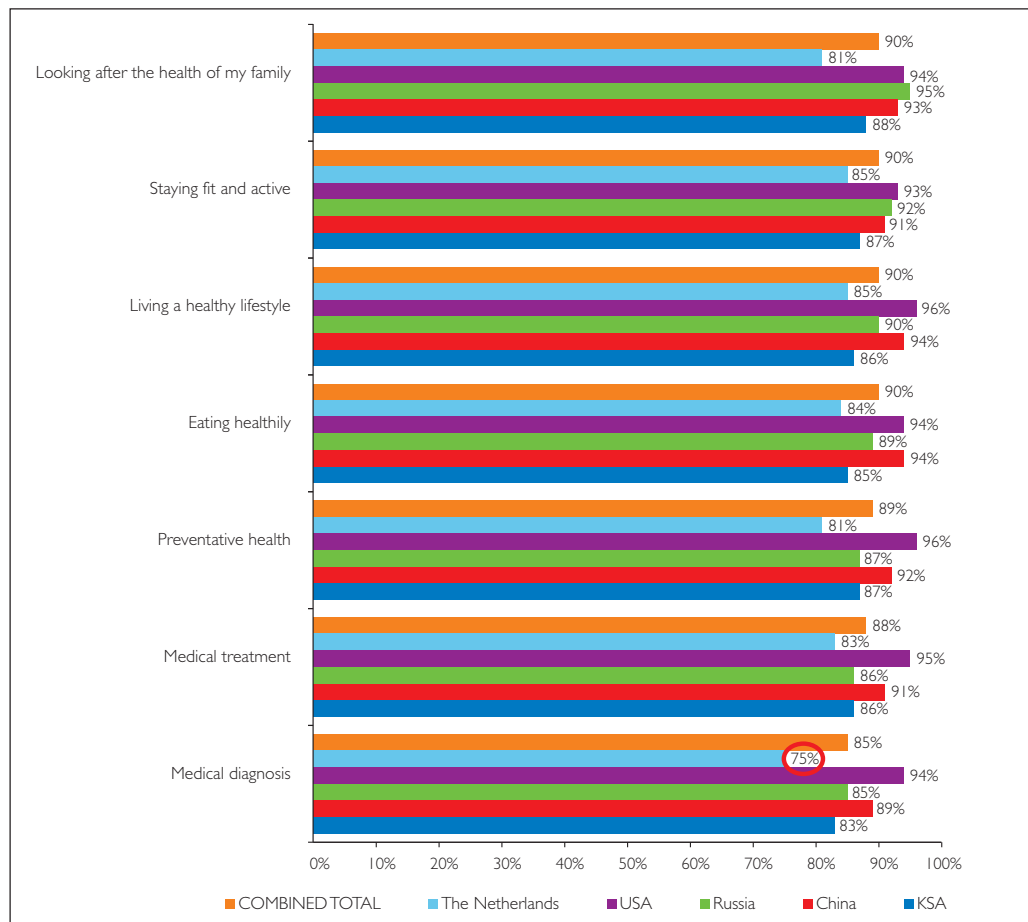
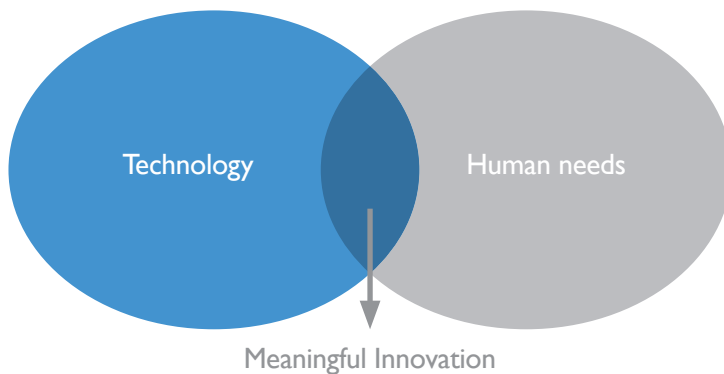


Figure 4: How important are each of the areas listed below in your life? (TOP 2 BOX: Very important/somewhat important)

V. Technology and Innovation



Having established which areas of life are considered most important, we must next look to understand the role technology plays in people's everyday lives and where they expect to see future innovation.

We examined to what extent people in the five markets surveyed agree with the role technology is currently having and will have in the future. To do so, 18 statements related to technology were reviewed with those surveyed. The statements provide insights into the following three areas:

- *Impact of Technology*: "Better lighting technology used in the area I live in has made me feel safer"; "Technology innovations in electric products for my daily personal care routine (e.g. shavers and toothbrushes) have made it easier to take care of my appearance"; "I expect technology to improve energy efficiency in my home"; "Technological advancements will fundamentally change our homes in the next 10 years".
- *Technology and Health*: "Access to medical technology is the most important factor for me to live a long life"; "Technology has a significant positive effect on my sense of health and well-being"; "I expect that future innovations in medical technology will mean that serious health issues won't affect me"; "Through technology I expect to be able to manage my own health better"; and "When I have a concern about a health issue, I usually check the internet first".

- *Attitudes to Technology:* “Technology has made my life better”; “Some technology innovations have been very meaningful in my life”; and “The internet has made my life better”; “I get really excited about the possibilities of new technologies”; “I wish there was less technology in my life”; “Most technology innovation is meaningless to me”; “Technology has made life more stressful”; “Social media (Twitter/Facebook) have made my life better”; and “I am concerned that the proliferation of social media such as Facebook and Twitter reduces my privacy”.

The majority of people surveyed say technology, including the Internet, greatly impacts their everyday lives. Many note that they expect technology and technological advancements to continue playing a role in their lives in the future, particularly with regard to the potential positive impacts on their home and their health and well-being.

Additionally, we examined in which areas of life people expect to see future innovations. We find that the five areas that were considered most important to their lives in the previous chapter were also the five key areas people would like to see innovation: being happy, sleeping well, communicating with family and friends, feeling safe in their home environment, and being comfortable at home. However, there is also strong appetite to see advancements in healthcare technologies, prioritizing innovations that will help them manage their health and that of their loved ones over innovations geared toward other areas of life such as entertainment.

V.a. The Role of Technology in Everyday Life

People Believe that Technology Plays a Key Role in their Lives and Expect it to Continue to do so in The Future

Across markets, people say technology impacts their lives greatly. Almost three quarters of the overall population surveyed agree that technology and the Internet have made life better. Many also note the importance of technology with regard to their health and well-being: at least two-thirds using it to manage their health better;

while over half believe it has a positive impact on their health and well-being. In addition, people expect that technology will continue to play a key role in their lives in the future, particularly by bringing innovation to their homes, and remaining unaffected by serious health issues.

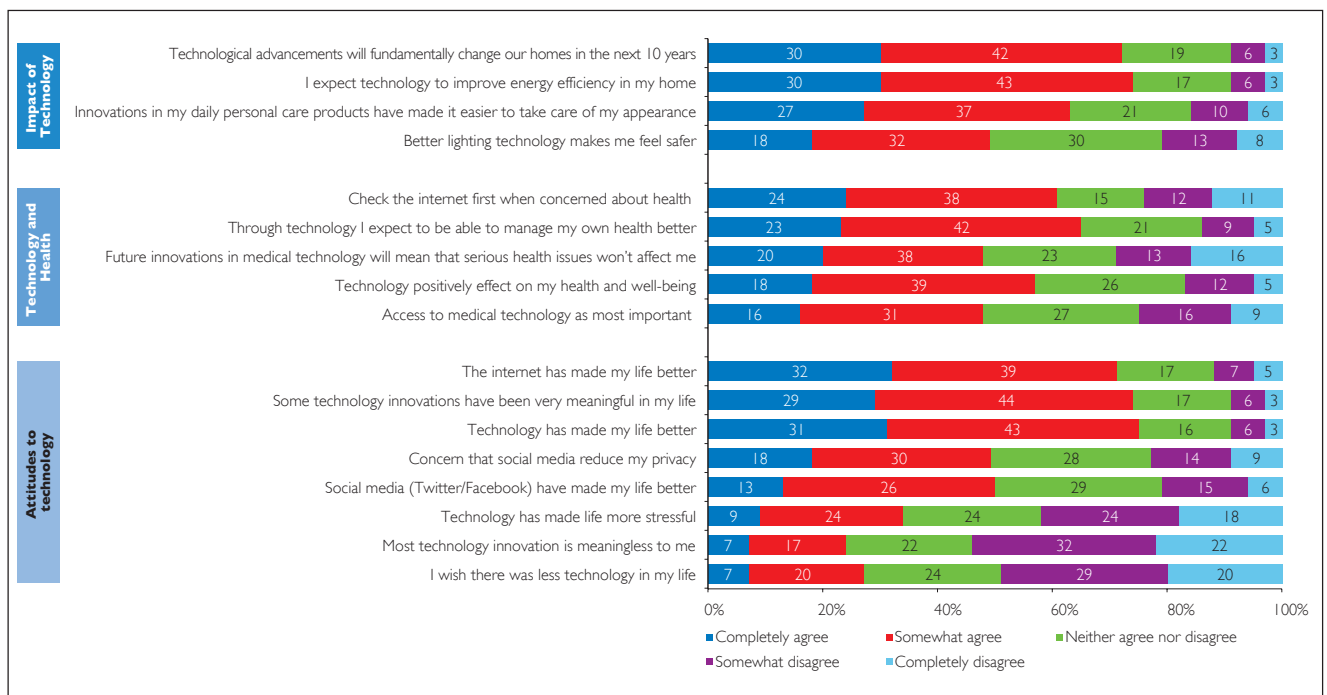


Figure 5: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements?

Attitudes to Technology

Across Markets, Technology Has Made Life Better and Some Innovations Have Been Very Meaningful; However, it is a Stressor for About One-Third of People

Overall, people's strength of agreement with attitudes towards technology vary across markets, however, the majority of citizens in each market believe technology has made life better and that some technology innovations have been very meaningful. There is also a strong belief that the internet has improved life in all markets except USA. US Citizens are also most likely to believe that social media reduces privacy.

Conversely, Chinese and Russian citizens are more likely to be excited about future innovations, and Russians are the least likely to believe social media is having a negative impact on privacy. Lastly, citizens of the Netherlands have a significantly lower affinity for technology as they are less likely to that technology and the Internet has made their lives better.

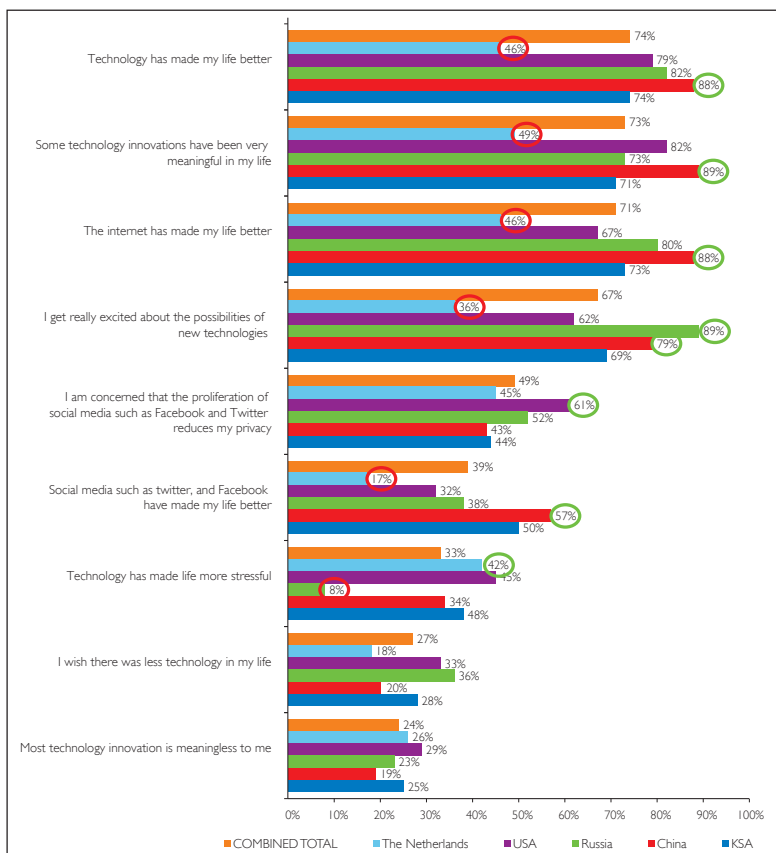


Figure 6: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements? (TOP 2 BOX: Completely Agree/Somewhat Agree)

Technology and Health

Citizens Across Most Markets Place High Importance on Technology and Believe It Will Be Important for Their Future Health

Chinese citizens are significantly more likely than the overall population to recognize the value of technology in relation to their health and well-being. Four-fifths (81%) of people in China say technology has had a positive effect on their sense of well-being while 85% expect technology to empower them with the ability to manage their health. A high proportion

of citizens in USA, Russia and KSA also agree with these statements. Just one-third of Dutch citizens agree that technology plays an important role in health management; however, they are almost equally likely as citizens from other markets to use the internet to check health issues, when concerned.

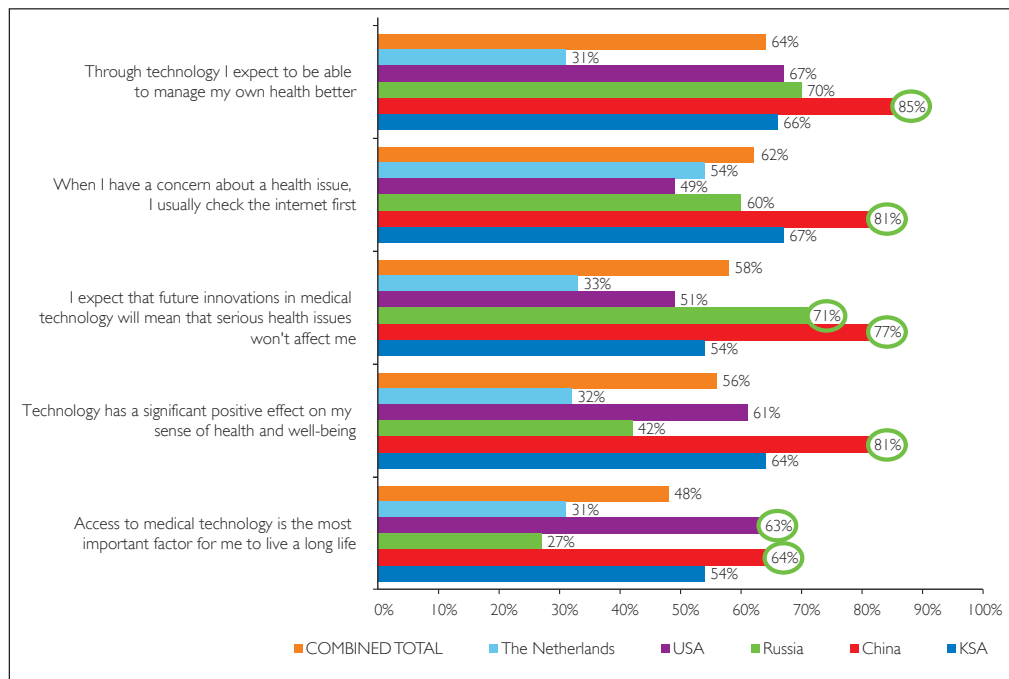


Figure 7: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements? (TOP 2 BOX: Completely agree/Somewhat agree)

Citizens Across Markets Expect That Future Innovations Will Result in Significant Changes to Their Home Environment

Overall, people believe that technology will improve energy efficiency and ultimately change our homes in the next 10 years. In particular, Chinese citizens are

more likely than the overall population to expect technology to improve their home's energy efficiency.

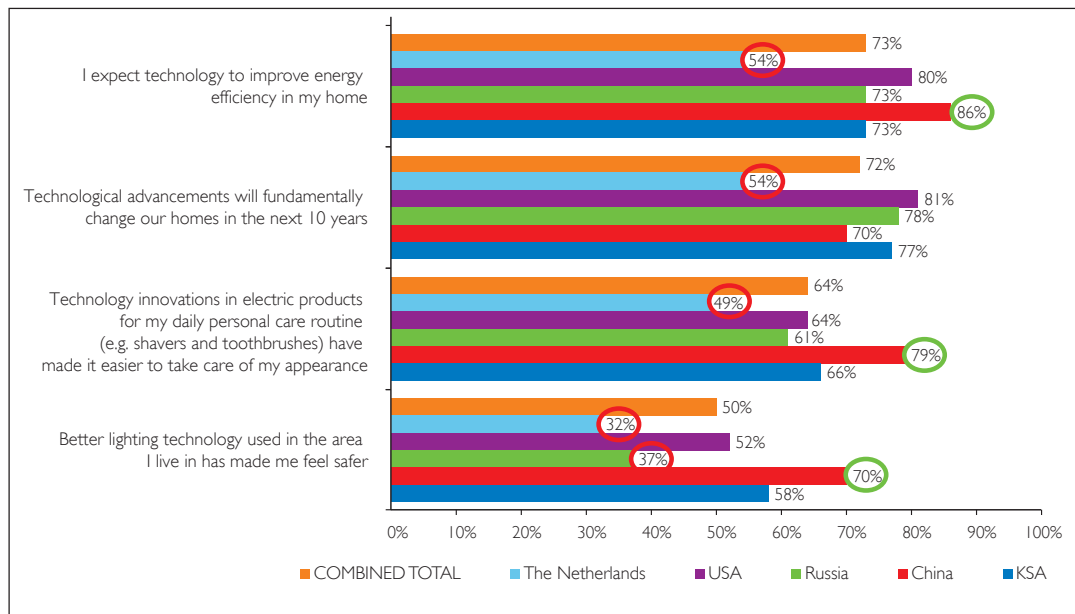


Figure 8: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements? (TOP 2 BOX: Completely Agree/Somewhat Agree)

V. b. Technology Behaviors

A Majority of People Across Markets Have Experienced Adopting a Life-Changing Technology

Among the overall population of people surveyed, three-fifths (61%) say they have experienced adopting a life-changing technology. However, people in the US and the Netherlands, who potentially have easier access to technology, are the least likely to believe they have experienced this. People across markets,

particularly those in China and the Kingdom of Saudi Arabia, are using internet technology to stay connected with their friends and family, opting for digital over in-person communication more often. This is potentially reflective of the large geographic distances between towns/cities in these markets.

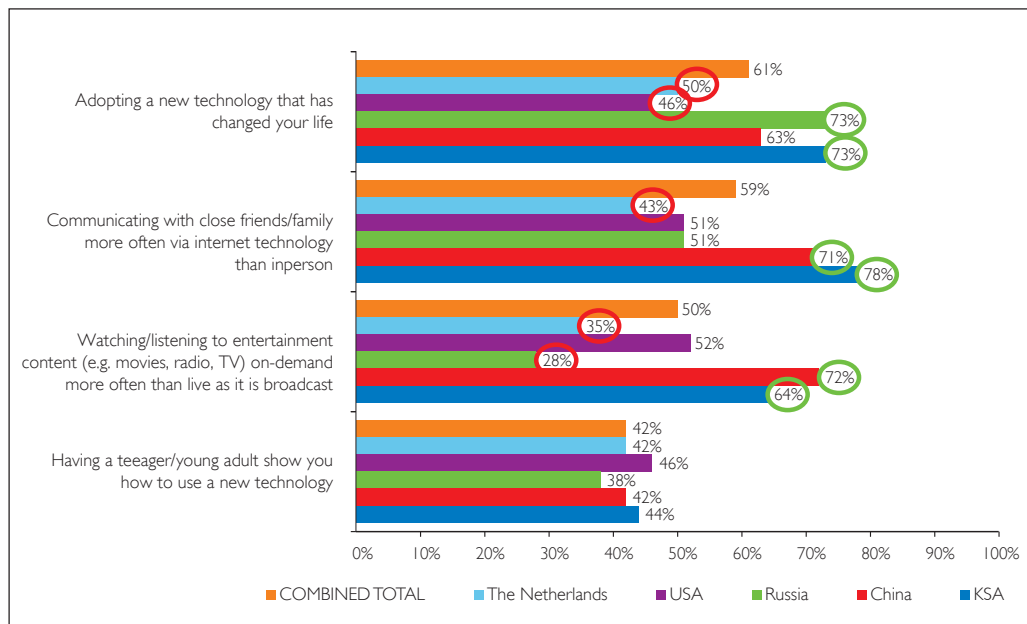


Figure 9: I am going to read you a list of life events. As I read each event, please tell me if it's something you have experienced up to this point in your life. (AGREE)

V.c. Where Would We Like to See Innovation?

Citizens Expect That Future Innovations Should Help With All Areas of Their Lives, in Particular, Preventative Health As Well As Health Maintenance and Management

Among our overall population surveyed, people are expecting to see innovations in the top five areas that ranked as most important in their lives: being happy; sleeping well; communicating with friends and families; feeling safe in their local community and; being

comfortable in the home they live in. However, citizens are also looking for companies to develop products and services related to their health and well-being needs.

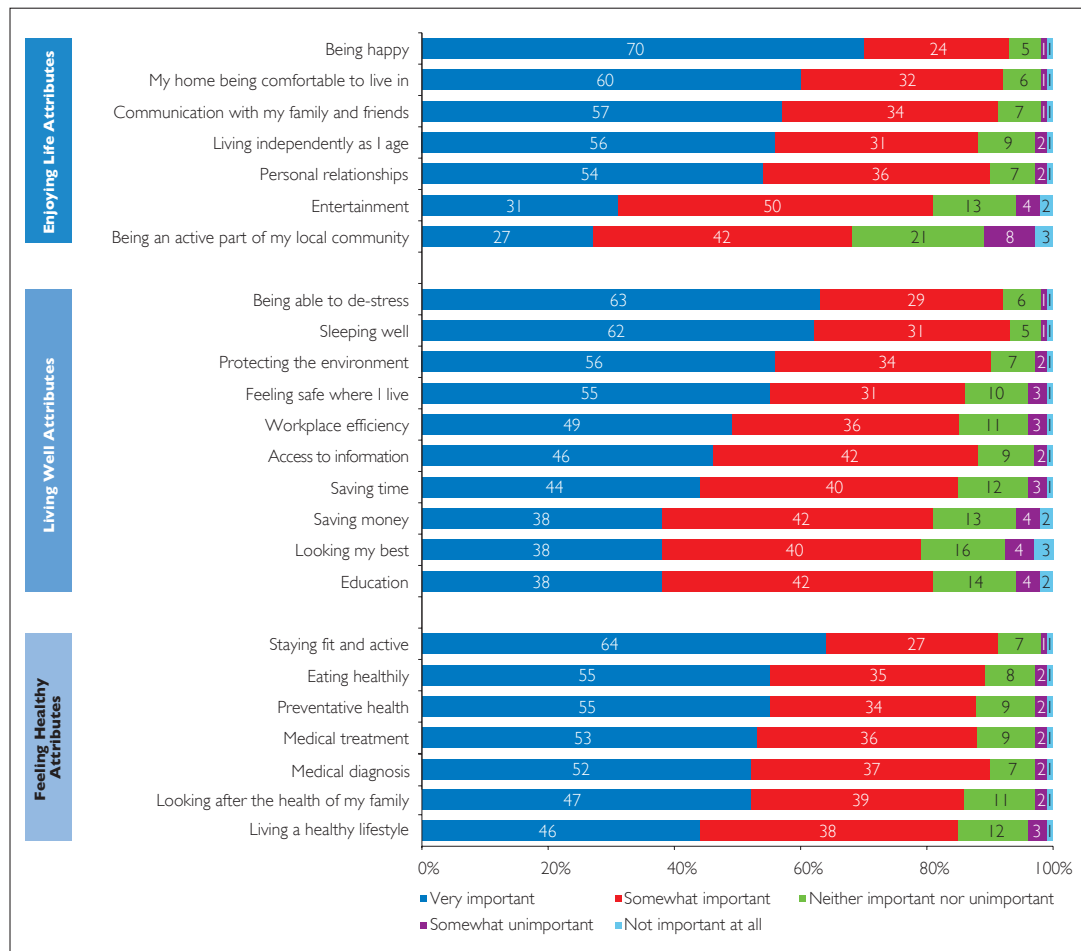


Figure 10: As companies continue to create new products and services in the future, how important are innovations in the following areas to you?

Enjoying Life Attributes

Across Markets, People Are Looking for Innovations That Affect Their Overall Well-Being Over Entertainment and Being an Active Part of Their Community

Across markets, people would like to see innovations in areas that would improve the comfort of their home, happiness, and staying connected with their family and friends most. Citizens of the Kingdom of

Saudi Arabia are more likely than the overall population to desire innovations that can help them become more active in their community.

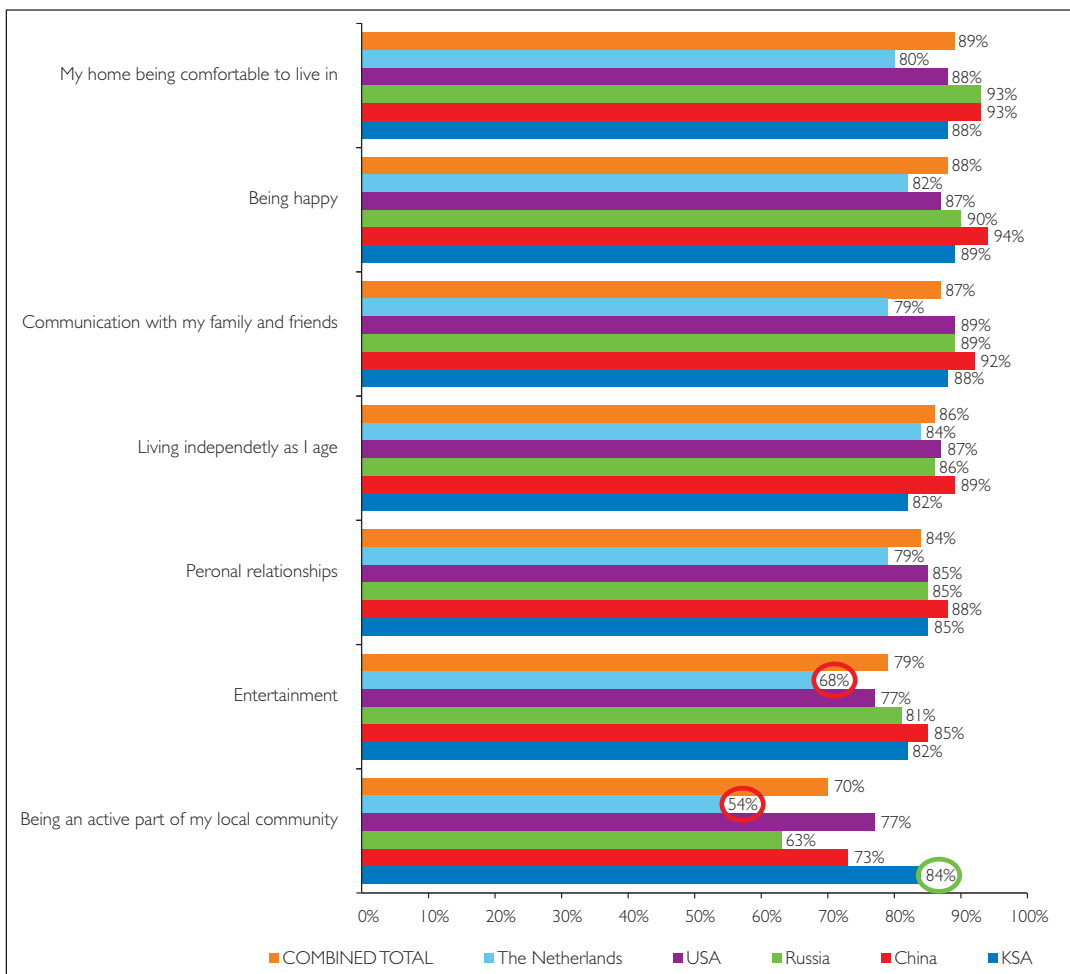


Figure 11: As companies continue to create new products and services in the future, how important are innovations in the following areas to you? (TOP 2 BOX: Very important/Somewhat important)

Living Well Attributes

There is High Demand to See Innovations Across All Living Well Attributes; Feeling Safe Where I Live is Most Important

Safety in one's home environment is considered an important area for innovation across markets. While most markets are on par with the overall population on the importance of innovation in all areas related to

living well, those in the Netherlands are significantly less likely than the overall population to place importance on innovations related to education, saving time, and personal appearance.

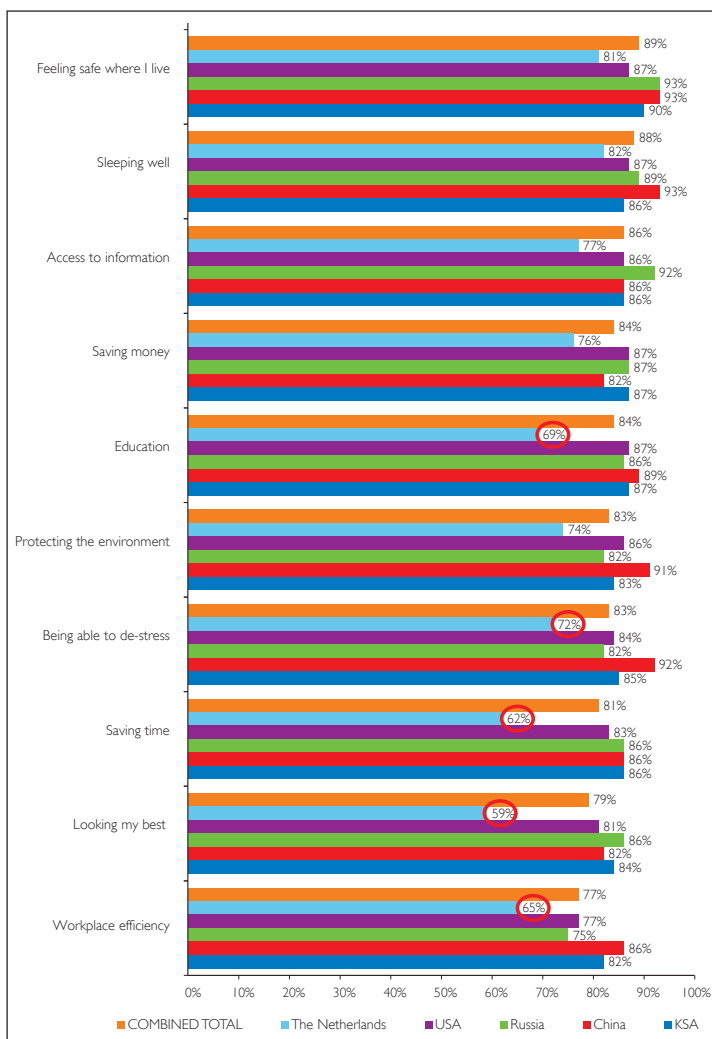


Figure 12: As companies continue to create new products and services in the future, how important are innovations in the following areas to you? (TOP 2 BOX: Very important/Somewhat important)

Feeling Healthy Attributes

There is a High Degree of Consistency In Citizens' Priorities When It Comes to Innovations In Health and Well-Being

Across markets, health and well-being is an important part of life. In that regard, people are looking for companies to create products that allow them to

monitor their family's health, seek medical treatment, prevent illness and lead a healthier lifestyle.

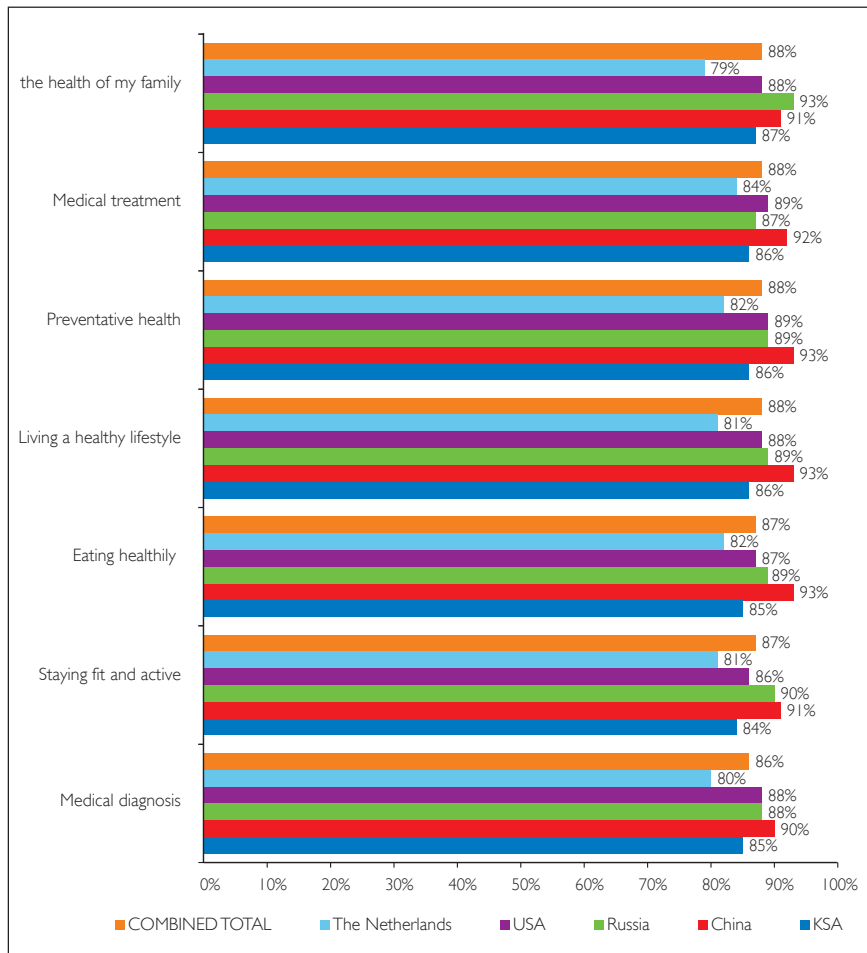
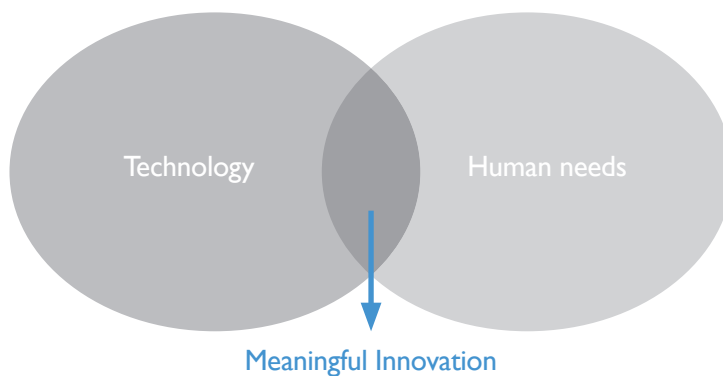


Figure 13: As companies continue to create new products and services in the future, how important are innovations in the following areas to you? (TOP 2 BOX: Very important/Somewhat important)

VI. What is Meaningful Innovation?



The intersection between what is most important to people and the role technology and innovation play in their everyday lives can provide powerful insight into how future innovations can be truly meaningful. Here, we examine how satisfied or dissatisfied people surveyed across markets are with currently-available technologies in 24 areas of life, categorized into Enjoying Life, Living Well, and Feeling Healthy.

Across markets, satisfaction with products related to communicating with family and friends, feeling comfortable at home, and accessing information is highest. However, people surveyed are not as satisfied with products in other areas. Using the Philips Meaningful Innovation Index – an analysis that weights overall satisfaction with available technology for various aspects of life by their relative stated importance to people’s everyday lives – we find that citizens of the Netherlands, China and the Kingdom of Saudi Arabia (KSA) share a low satisfaction with products across areas of life, while American citizens are more likely to be satisfied with products in all areas and Russian citizens are less likely to be satisfied with products that help them live well and feel healthy.

Further analysis of stated importance and net satisfaction with products in all areas shows that satisfaction is low with regard to products available for 10 key areas of life: protecting the environment, saving money, stress relief, living independently as one ages, education, preventative health (preventing disease and illness), education, medical treatment, medical diagnosis, workplace efficiency and saving time. Given the relatively low satisfaction with products in these 10 areas across markets versus their relative importance, we find that innovation will be most meaningful here.

VI. a. How Satisfied Are We with Current Products?

Most People Are Satisfied With Products That Help Them Stay Connected

The majority of people among our overall sample (over 70%) say they are satisfied with products currently on the market that help them communicate with their

family and friends and access information. However, levels of satisfaction are low across all areas. Particularly, when looking at those who say they are completely satisfied.

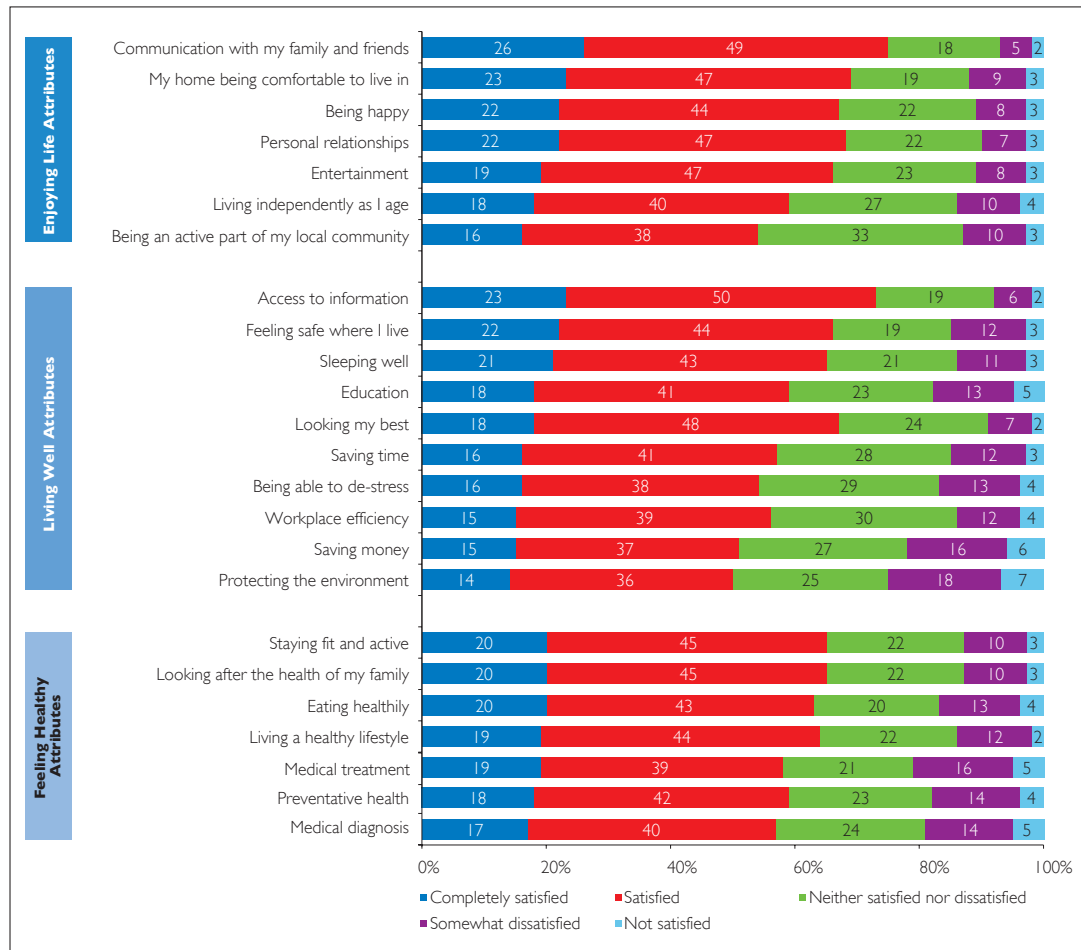


Figure 14: How satisfied are you with the products now available to you in the following areas?

Enjoying Life Attributes

American Citizens Are More Likely to Be Satisfied With Currently-Available Products

American citizens are more likely than others to be satisfied with various products that help them enjoy life to the fullest. However, Russian citizens tend to be

least satisfied, particularly with products that help them live independently through the aging process and remain an active member of their community.

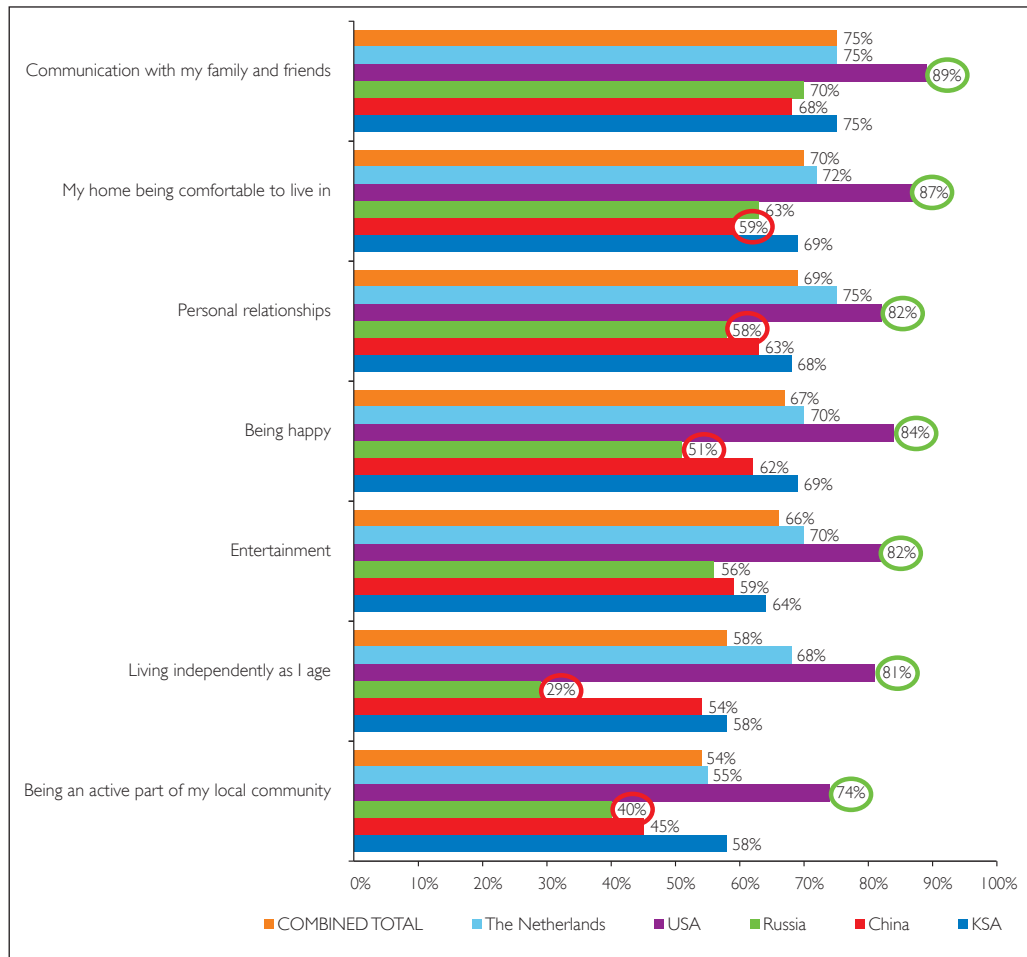


Figure 15: How satisfied are you with the products now available to you in the following areas? (TOP 2 BOX: Completely satisfied/Satisfied)

Living Well Attributes

Across Markets, Citizens Believe That Technology That Helps Them Access Information is Up to Standard

Currently-available products that allow people to access information, look their best and sleep well are found to be the most satisfactory across markets. Satisfaction with products that aim to help people

save time and money, de-stress, and be more efficient at work is comparatively low, particularly for Russian citizens.

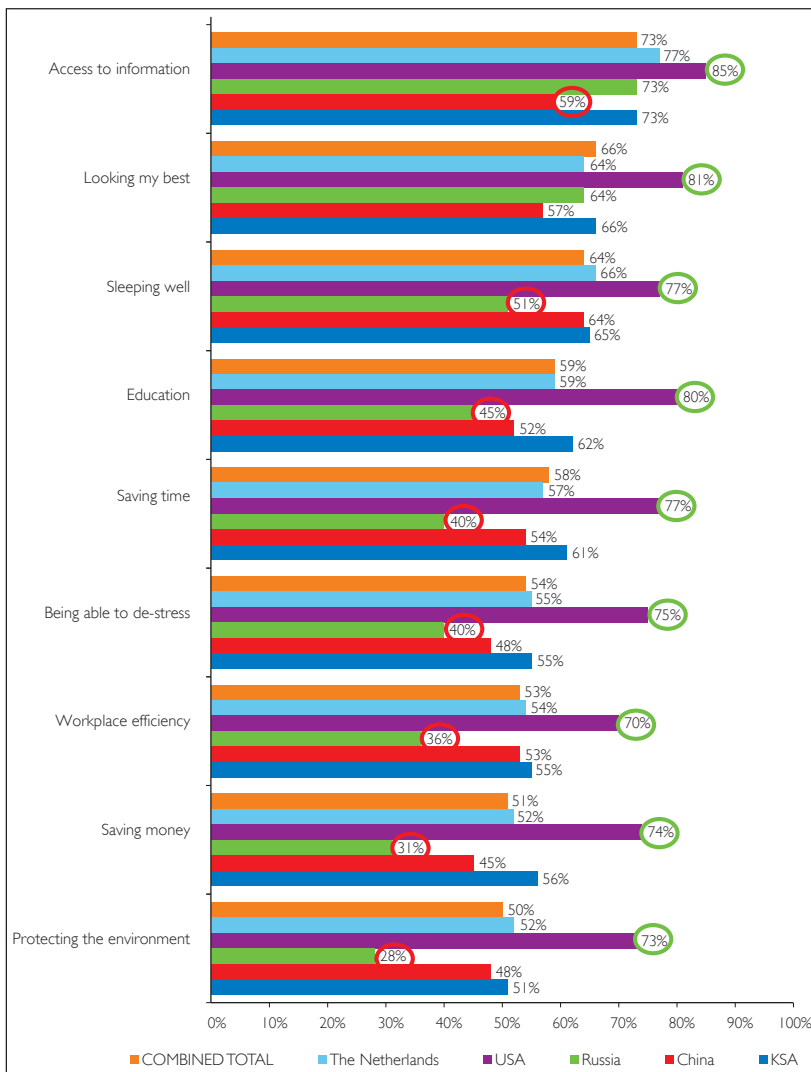


Figure 16: How satisfied are you with the products now available to you in the following areas? (TOP 2 BOX: Completely satisfied/Satisfied)

Feeling Healthy Attributes

Overall Satisfaction With Health and Well-Being Products Is Average; However, There is Room for Advancements, Particularly In Medical Diagnostics and Treatment

Across markets, people are satisfied with many products focused on their health and well-being. However, there is room for improvement in medical

diagnostic and treatment products, particularly for Russian citizens.

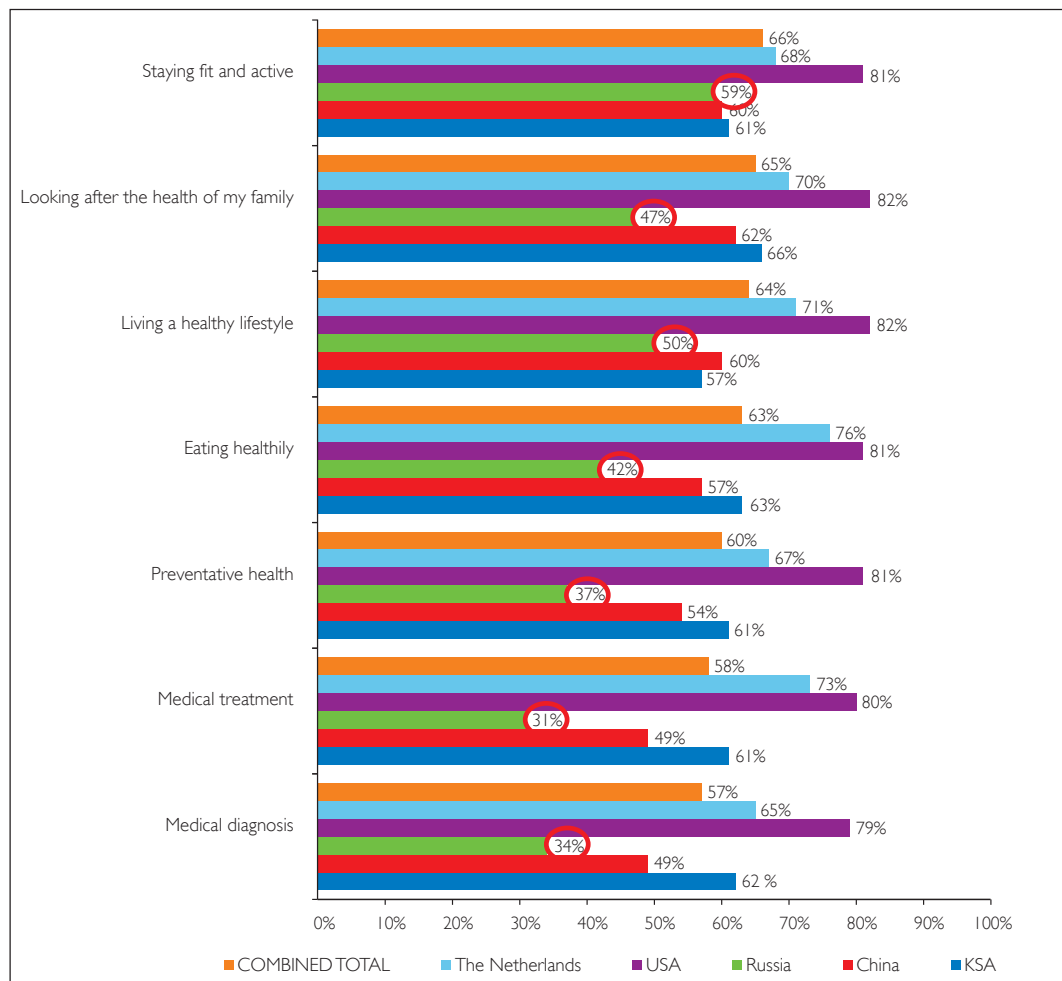


Figure 17: How satisfied are you with the products now available to you in the following areas? (TOP 2 BOX: Completely satisfied/Satisfied)

VI. b. Is Innovation Meaningful: The Philips Meaningful Innovation Index

What is the Philips Meaningful Innovation Index?

The Philips Index is an analysis that weights overall satisfaction with technology available for various aspects of life by their relative stated importance to people's everyday lives. Doing so allows the opportunity to isolate attributes and satisfaction relative to components that

are considered important. In addition to the Overall Innovation Index, sub-indices were created to examine Enjoying Life, Living Well and Feeling Healthy attributes. These indices are found throughout this report.

How is the Philips Meaningful Innovation Index Calculated?

Using Survey Question 3 (stated importance) and Survey Question 5³ (satisfaction), OneVoice Measurement multiplied the average stated importance against average satisfaction. More specifically:

- Total Index = the average of Q3 (stated importance) × Q5 (satisfaction) across all areas of life. All areas are categorized into three sub-indices:
 - Enjoying Life
 - Living Well
 - Feeling Healthy

- Enjoying Life Index = the average of Q3 (stated importance) × Q5 (satisfaction) across the following items:
 - Being happy, personal relationships, communication with one's family and friends, entertainment, one's home being comfortable to live in, living independently as one ages, and being an active part of one's local community.

- Living Well Index = the average of Q3 (stated importance) × Q5 (satisfaction) across the following items:
 - Looking one's best, sleeping well, saving time, saving money, feeling safe where one lives, attaining an education, having access to information, workplace efficiency, protecting the environment and the ability to de-stress.

- Feeling Healthy Index = the average of Q3 (stated importance) × Q5 (satisfaction) across the following items:
 - Staying fit and active, living a healthy lifestyle, eating healthily, looking after the health of one's family, preventative health (preventing disease and illness), and receiving medical diagnosis and/or treatment.

³ See Appendix A for full questions.

American Citizens Over-Index Across All Categories While Russian Citizens Under-Index

People living in the United States are about 20% more likely to be satisfied with currently available products related to important aspects of their lives. On the other hand, Russian citizens are less likely than the overall population to be satisfied with products geared toward helping them live well and feel healthy.

	Combined Total	Netherlands	USA	Russia	China	KSA
Meaningful Innovation Index	54%	52%	74%	41%	49%	54%
Enjoying Life Index	57%	57%	76%	39%	50%	57%
Living Well Index	51%	45%	72%	42%	48%	53%
Feeling Healthy Index	55%	58%	75%	40%	51%	53%

Table 3

VI. c. Where to Innovate to Be More Meaningful

Identifying Where to Innovate

To prioritize where we focus future innovations to deliver innovation that is truly meaningful, we examined what is important in people's lives by their net satisfaction with products in each area.

This was calculated using Survey Question 3 (stated Importance) and Survey Question 5⁴ (Satisfaction):

⁴ See Appendix A for full questions.

Importance multiplied by net satisfaction (Net Satisfaction = Very Satisfied minus Dissatisfied and Neutral).

This approach allows us to identify priority areas: those areas that have the least net satisfaction compared with their importance to people's everyday lives.

Meaningful Innovation Should Aim to Help People Enjoy Life, Live Well and Feel Healthy

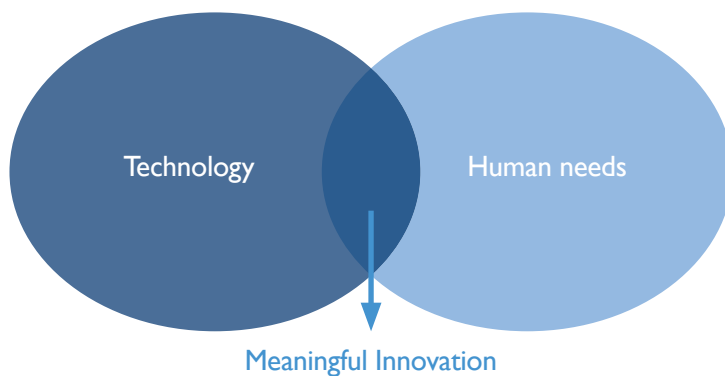
When considering which aspects of life are most important to people across markets and how satisfied they are with current products to those ends, there is room to innovate in several different areas. Upcoming products should seek help people across markets

protect the environment, save money, live on their own as they age, release stress, and educate themselves. Innovations that help people feel healthy are needed as well, including products to prevent, diagnose and treatment medical conditions.

	Combined Total	Netherlands	USA	Russia	China	KSA
Enjoying Life						
Living independently as I age	-14%	-9%	10%	-37%	-14%	-9%
Being an active part of my local community	-8%	-4%	-1%	-11%	-8%	-9%
Being happy	-7%	-9%	15%	-24%	-11%	-1%
Personal relationships	-5%	-3%	10%	-15%	-8%	-2%
Entertainment	-5%	-4%	2%	-10%	-7%	-4%
My home being comfortable to live in	-4%	-5%	18%	-13%	-11%	-1%
Communication with my family and friends	1%	-2%	21%	-6%	-5%	4%
Living Well						
Protecting the environment	-17%	-10%	-1%	-28%	-19%	-15%
Saving money	-15%	-11%	0%	-25%	-11%	-13%
Being able to de-stress	-14%	-12%	0%	-23%	-15%	-14%
Education	-13%	-10%	7%	-22%	-14%	-9%
Workplace efficiency	-12%	-7%	-4%	-18%	-11%	-13%
Saving time	-10%	-4%	1%	-20%	-9%	-9%
Sleeping well	-9%	-10%	4%	-23%	-10%	-5%
Feeling safe where I live	-8%	-6%	17%	-32%	-14%	5%
Looking my best	-6%	-4%	4%	-10%	-8%	-5%
Access to information	-2%	-2%	11%	-2%	-8%	2%
Feeling Healthy						
Preventative health (preventing disease and illness)	-13%	-8%	7%	-27%	-14%	-9%
Medical treatment	-12%	-5%	8%	-28%	-15%	-9%
Medical diagnosis	-12%	-8%	5%	-26%	-13%	-8%
Living a healthy lifestyle	-9%	-6%	10%	-19%	-15%	-10%
Looking after the health of my family	-9%	-7%	10%	-30%	-11%	-5%
Eating healthily	-9%	-3%	8%	-24%	-15%	-6%
Staying fit and active	-7%	-7%	8%	-13%	-10%	-8%

Table 4

VII. Making Innovation Meaningful: Impact of Age



Having identified what represents meaningful innovation to people across markets, we must next examine how important life needs and the impact of technology differ as one ages. Looking first at life and human needs, we find that the five areas of life ranked as most important – being happy, sleeping well, their home being comfortable to live in, a sense of safety in their home environment, and communication with friends and family – remain consistent across all age groups. While the importance of living independently increases as people get older, there is consensus across age groups on the importance of the health and well-being of themselves and loved ones.

Next, we find consistency again in the role of technology plays in people's lives. Both younger and older generations have experience with technology and expect that future innovations will have a profound impact on their lives, particularly on their homes and health and well-being. Unsurprisingly, young people are more technologically "plugged in" than their older counterparts; however, older citizens have begun to enlist the help of younger citizens to learn new technologies.

Across age groups, satisfaction with available products related to several of the five most important areas of life is low, with the exception of communication with family and friends. However, seniors 65+ are more satisfied than the overall surveyed population with products that prevent illness and treat medical conditions. Ultimately, we find that despite age differences, people across markets agree that innovation in 10 key areas of life – protecting the environment, saving money, stress relief, living independently as one ages, education, preventative health (preventing disease and illness), education, medical treatment, medical diagnosis, workplace efficiency and saving time – would be most meaningful.

VII. a. Life: What is Important as We Age?

Enjoying Life Attributes

Importance of Life Aspects Consistent Across Age Groups

Across markets, people of various ages agree on the importance of many aspects of life, including happiness, the comfort level of one's home, and staying connected to family and friends. However,

there are slight differences in importance of living independently as people age: importance of this area increasing as citizens age.

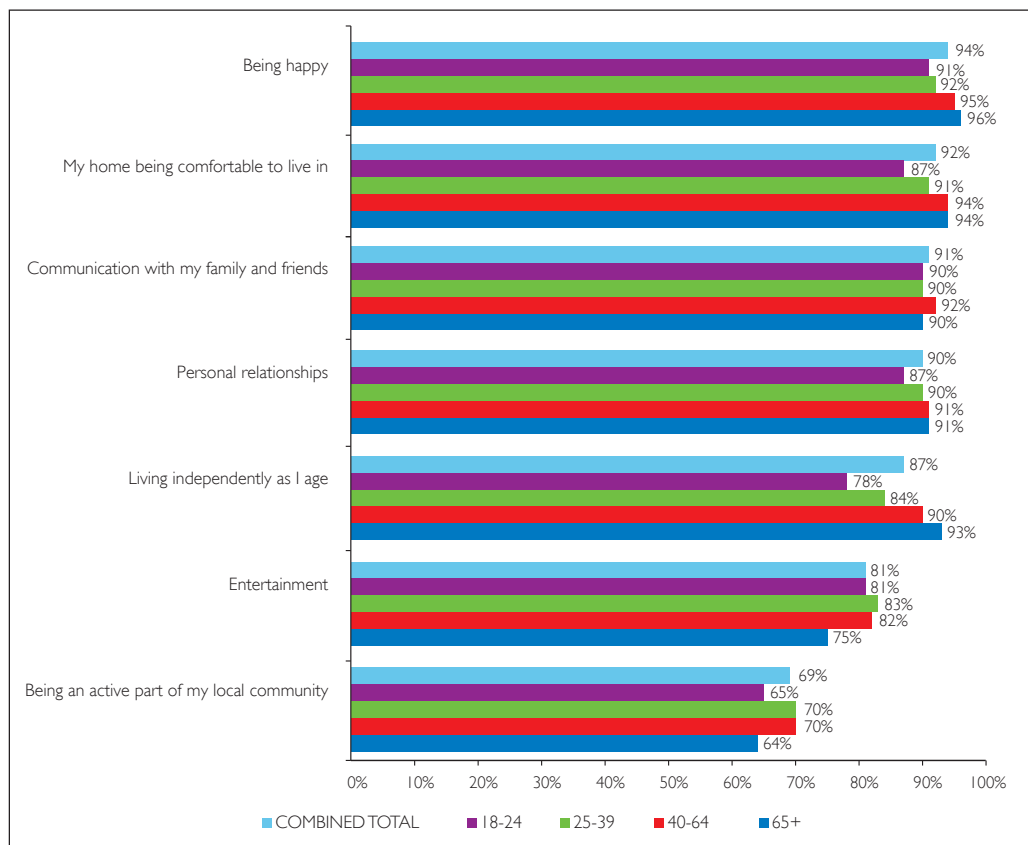


Figure 18: How important are each of the areas listed below in your life? (TOP 2 BOX: Very important/Somewhat important).

Living Well Attributes

Restful Sleep and Sense of Security At Home Lead As Important Factors for “Living Well”

Across markets, people of various ages agree on the importance of many aspects of life, including happiness, the comfort level of one's home, and staying connected to family and friends. However,

there are slight differences in importance of living independently as people age: importance of this area increasing as citizens age.

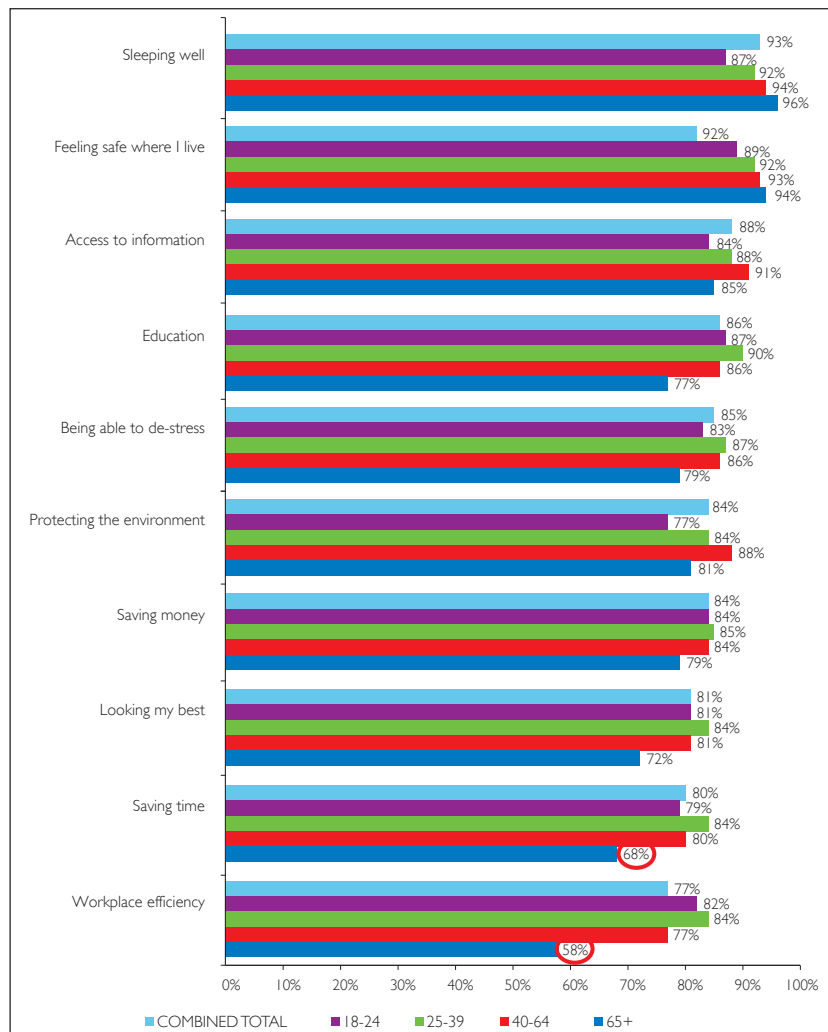


Figure 19: How important are each of the areas listed below in your life? (TOP 2 BOX:Very important/Somewhat important).

Feeling Healthy Attributes

Older Generations Are Typically More Health-Focused; However, Younger Generations Are Becoming More Interested in Health and Well-Being

Seniors aged 65+ tend to be more health-conscious than their younger counterparts, and therefore believe innovations in healthy nutrition, preventive health, and medical diagnostics are most important. Younger people, however, are becoming more and more

health-focused, looking for new technologies that will help them monitor their family members' health, increase the effectiveness of medical treatments, and help them remain fit and active over time.

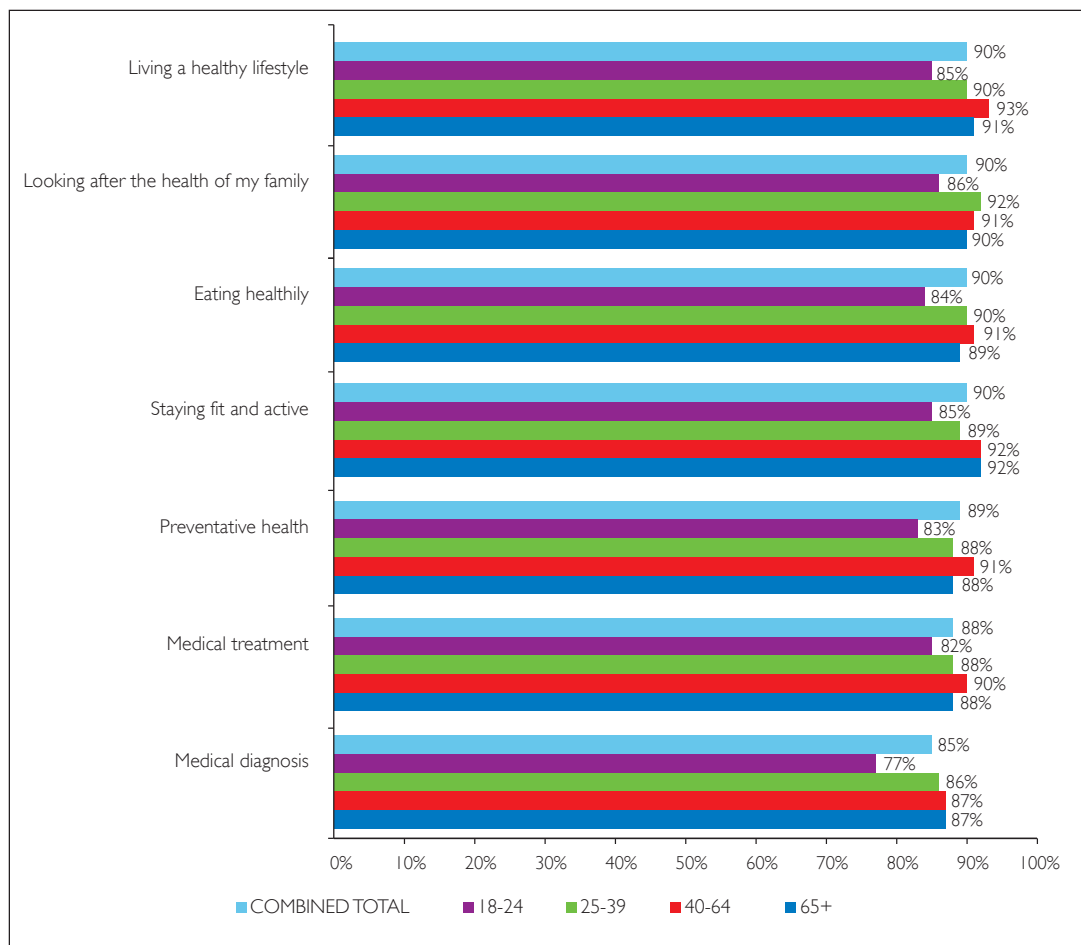


Figure 20: How important are each of the areas listed below in your life? (TOP 2 BOX: Very important/Somewhat important)

VII. b. Technology and Innovation: Impact of Age

Impact of Technology

Expectations That Technology Will Have a Profound Impact on Life Are High Across Age Groups

When it comes to the impact technology has on everyday life, both younger and older generations have high expectations. Nearly three-fourths of people expect that their homes will be fundamentally changed in the next 10 years by new technologies.

Similarly, many believe technology will help improve their home's energy efficiency. Ultimately, younger people aged 18-64 are more apt to incorporate technological advances into the maintenance of their appearance than seniors aged 65+.

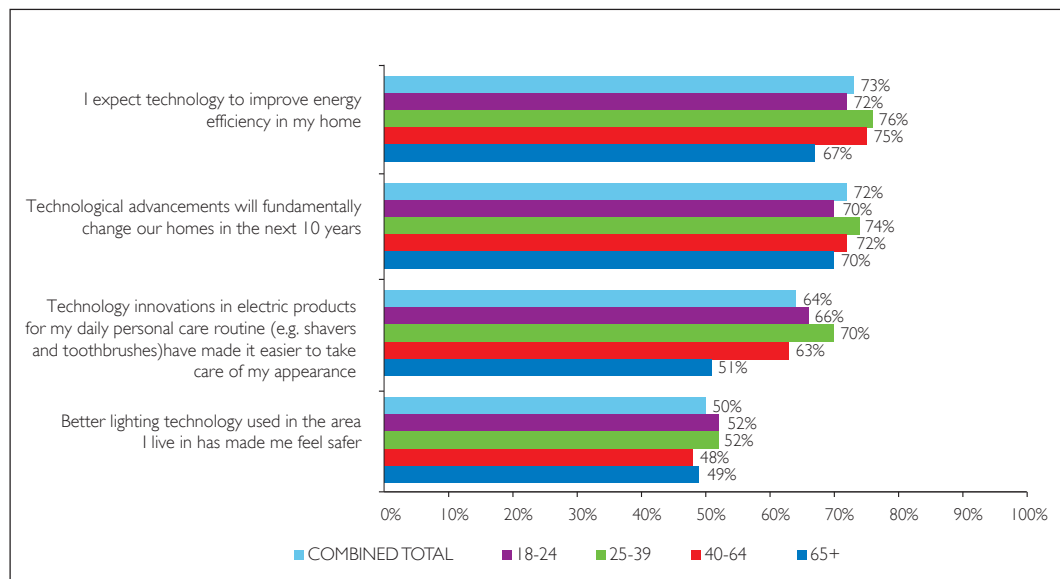


Figure 21: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements. (TOP 2 BOX: Completely agree/Somewhat agree)

Attitudes to Technology

Younger People Are More Positive About The Impact of Technology, Including Social Media

While seniors are less likely to say they get excited about the possibilities of new technologies, they do recognize the value of technology. Most agree that technology – including the internet – has improved their lives. Unsurprisingly, the younger audience

tends to be the most positive about the impact of technology. This is particularly true of their attitudes towards social media platforms, with almost half believing that these platforms have made their lives better.

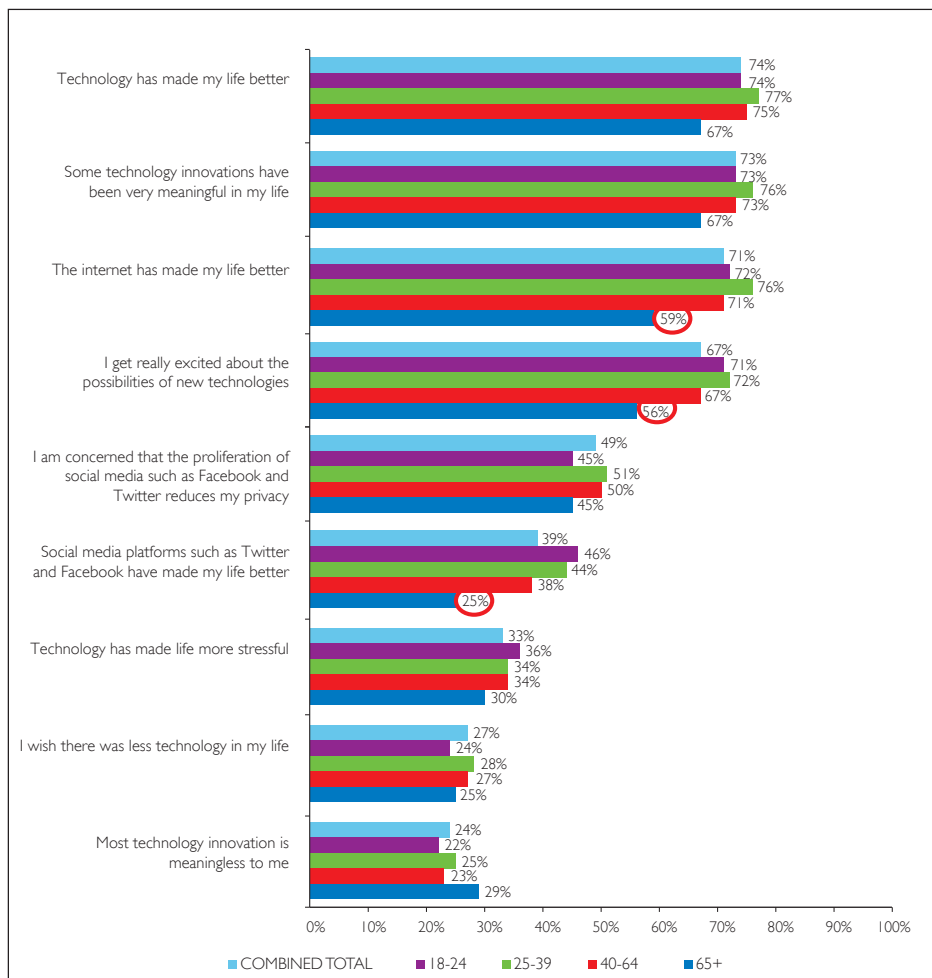


Figure 22: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements. (TOP 2 BOX: Completely agree/Somewhat agree)

Technology and Health

Across Markets, People of All Ages Are Looking To Future Technologies To Effectively Manage Health

Younger and older generations across markets on are par with regard to how they view technology's benefit to their health and well-being compared with the rest of the population. Most expect to be able to use technological

advancements to better manage their own health more effectively. While, older citizens, 65+ are still the least likely to use the internet to check health concerns first, almost half (48%) are using it in this manner.

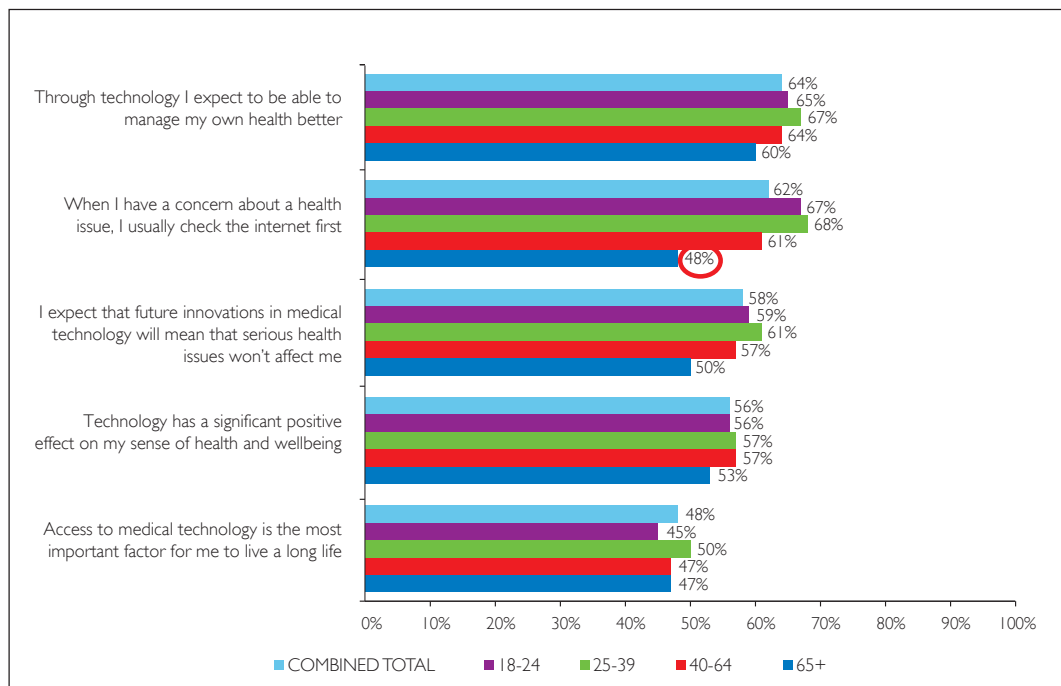


Figure 23: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements. (TOP 2 BOX: Completely agree/Somewhat agree)

Experience with Technology

Young People Are “Plugged In” and Older Citizens Are Tapping into Their Technological Knowledge

In line with expectations, the younger population is more technologically “plugged in” than the senior audience as well as the overall population. However, when it comes to watching on-demand entertainment content, the mature and middle-aged populations are more likely to do this (25-39 yrs and 40-64 yrs). Senior citizens have begun to tap into youths as a

resource in efforts to learn new technology. While a significant proportion of both youths and seniors have experienced adopting a new, life-changing technology, both age groups are less likely to have experienced this than the rest of the population. This is potentially the result of their ages, as well their experience with technology.

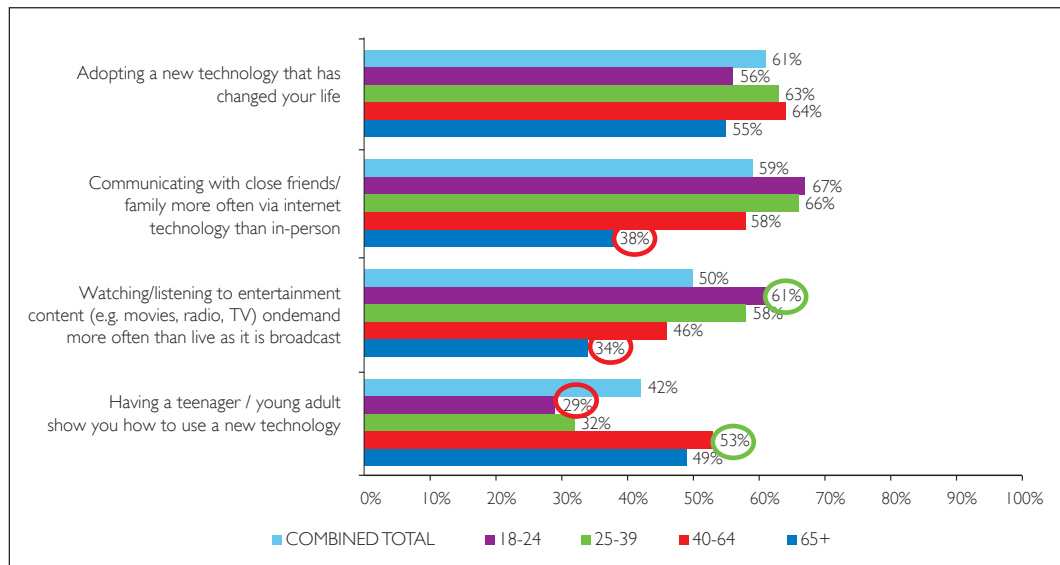


Figure 24: I am going to read you a list of life events. As I read each event, please tell me if it's something you have experienced up to this point in your life. (AGREE)

VII. c. Satisfaction With Current Products by Age

Enjoying Life Attributes

Most Are Satisfied With Products That Allow for Staying Connected and Feeling Safe at Home

While most senior people are satisfied with currently-available products that help them cultivate personal relationships and communicate with family and friends, fewer are content with recent products meant to help them be a more active part of their local community. Younger people are satisfied with current

entertainment products.

Interestingly, seniors are more satisfied than their younger counterparts with products that help them live independently as they age, perhaps indicating a future demand as the younger cohorts age.

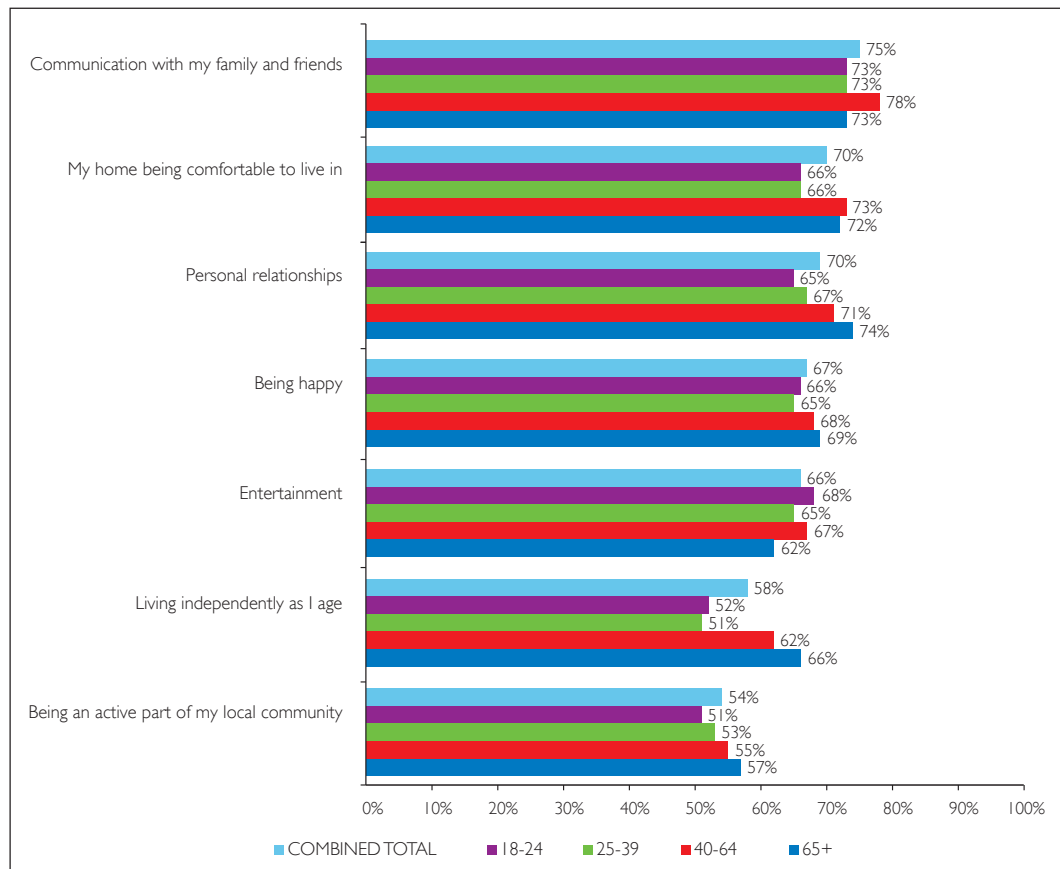


Figure 25: How satisfied are you with the products now available to you in the following areas? (TOP 2 BOX: Very satisfied/Somewhat satisfied)

Living Well Attributes

Most Are Satisfied With Products That Provide Access to Information, Satisfaction Is Low Elsewhere

The majority of both younger and senior people are relatively satisfied with current products aimed at helping them live well, particularly those products which promote feelings of safety in their home

environment, aids in restful sleep, and allows them to look their best. However, more youths value products that help make their workplace more efficient.

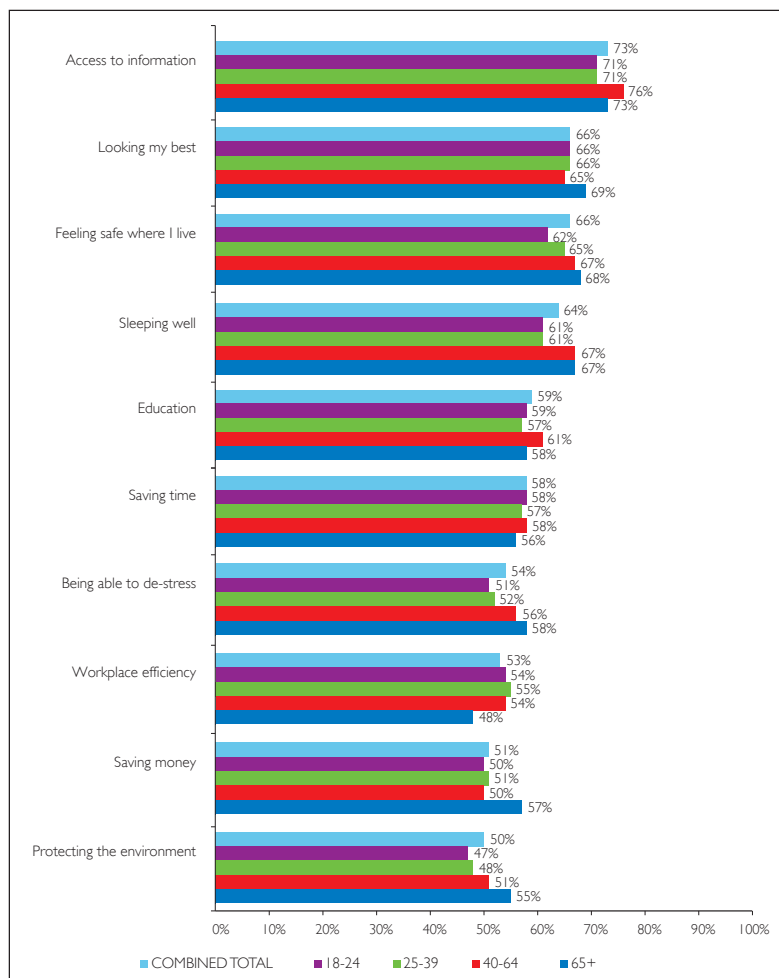


Figure 26: How satisfied are you with the products now available to you in the following areas? (TOP 2 BOX:Very Satisfied/Somewhat satisfied)

Feeling Healthy Attributes

Senior Citizens are Most Satisfied with Currently Available Products That Prevent Illness and Keep Them Healthy

While people of all ages across our overall population are somewhat satisfied with currently-available products that assist them in leading a healthy life, being active and staying on top of their loved ones' health,

more seniors place value on products that prevent illness. Overall, more seniors 65+ are satisfied with products currently on the market that help them feel healthy than younger people.

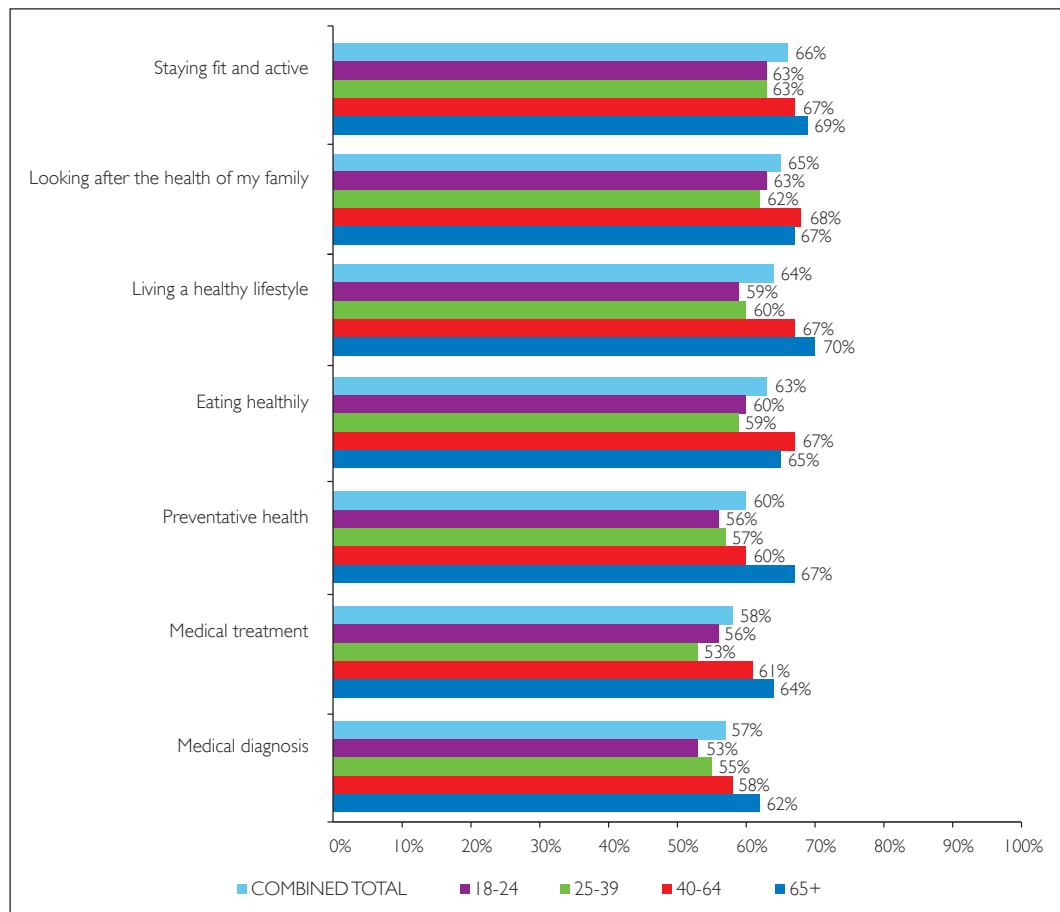


Figure 27: How satisfied are you with the products now available to you in the following areas? (TOP 2 BOX:Very satisfied/Somewhat satisfied)

VII. d. Is Innovation Meaningful: Philips Innovation Index by Age

Younger and Older Generations Largely on Par on Their Views of Current Innovation

Overall, people of all ages across markets find common ground in terms of how satisfied they are with products that relate to the most important aspects of their lives. However, Index scores are low overall, with middle-aged population doing better (40-64 yrs).

Overall, people of all ages are doing better in terms of satisfaction with currently available products in areas that help people enjoy life, particularly communicating with their friends and family and being happy.

	COMBINED TOTAL	18-24 yrs	25-39 yrs	40-64 yrs	65+ yrs
Meaningful Innovation Index	54%	50%	52%	56%	54%
Enjoying Life Index	56%	52%	54%	59%	58%
Living Well Index	51%	48%	51%	52%	48%
Feeling Healthy Index	55%	49%	52%	58%	59%

Table 5

VII. e. Where to Innovate to Be More Meaningful

People Across Age Groups are Most Dissatisfied with Products Aimed at Helping Them “Live Well”

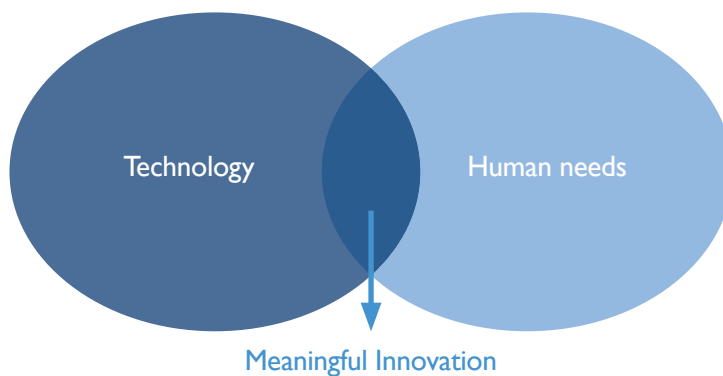
There is high level of consistency across ages with regard to the top 10 priority areas previously identified as in need of innovation. These ten areas are those which the overall population is least satisfied with currently-available products compared to their importance. Overall, there is room to innovate with

products that protect the environment, help people save money and help them release stress. In addition, innovations in healthcare are needed. There are no significant differences in satisfaction with available products by age range.

	COMBINED TOTAL	18-24 yrs	25-39 yrs	40-64 yrs	65+ yrs
Enjoying Life	54%	50%	52%	56%	54%
Living independently as I age	-14%	-13%	-16%	-12%	-8%
Living Well	54%	50%	52%	56%	54%
Protecting the environment	-17%	-16%	-17%	-17%	-13%
Saving money	-15%	-17%	-16%	-15%	-10%
Being able to de-stress	-14%	-16%	-16%	-14%	-10%
Education	-13%	-14%	-15%	-11%	-12%
Workplace efficiency	-12%	-14%	-13%	-12%	-8%
Saving time	-10%	-11%	-11%	-9%	-8%
Feeling Healthy	54%	50%	52%	56%	54%
Preventative health (preventing disease and illness)	-13%	-13%	-14%	-13%	-7%
Medical treatment	-12%	-13%	-16%	-11%	0%
Medical diagnosis	-12%	-12%	-13%	-12%	-10%

Table 6

VIII. Making Innovation Meaningful: Impact of Lifestage



While age can be a key determinant of differing perspectives on the important areas of life and the impact of technology, we must look beyond age alone to obtain a more holistic understanding. Next, we must pinpoint the lifestage of people surveyed across markets, examining the types of life events they have experienced, their age, their family and economic situations, and their experience with technology. Accordingly, eight groups of people were identified across the five markets, with each group representing a different lifestage segment⁵:

- *Traditional Families*: 25-44 yrs, low to average income, single with no children, living with parents and 1-2 others under 18 years, no serious medical conditions and low technology experience.
- *Young Up-and-Coming Techies*: 18-34 yrs, low to average income, married (never divorced) with 1-2 children under 18 yrs, no serious medical conditions and high technology experience.
- *Techie Family-Oriented Seniors*: 45-65+ yrs, low income, married grandparents who provide childcare for grandchildren, have experience a mid-life crisis, survived a serious medical conditions, has changed careers or retired, and high technology experience.
- *Steady Empty Nesters*: 55-65+ yrs, low to average income, married grandparents who provide childcare to grandchildren, have not experienced a mid-life crisis, no serious medical conditions and moderate technology experience.

⁵ See page 51 for a full description of each lifestage segment.

- *Affluent Techie Families*: 25-54 yrs, average to high income, married with 1-2 children under 18 yrs, has made a major career change, no serious medical conditions and high technology experience.
- *Struggling Mature Tech-Intermediates*: 25-44 yrs, low income, mix of married and singles/ parents and non-parents, 0-1 child under 18 yrs living with them, has lost a job and made a major career change, no serious medical conditions and moderate technology experience.
- *Middle-Aged Non-Traditional Families*: 35-54 yrs, low to average income, mix of divorced and singles / divorced and re-married with 0-1 child under 18 yrs, has lost a job and made a major career change, no serious medical conditions, and moderate technology experience.
- *Starting Out Non-Techies*: 18-34 yrs, low to average income, single with no children, has not lost a job and made a major career change, no serious medical conditions, and low technology experience.

Examining important life needs across lifestages, we find, despite differences in life experience and technology behavior, attributes related to Enjoying Life remain consistent as the most important areas of life. Four of the top 5 areas of life ranked most important across markets – being happy, being comfortable in one's home, communication with family and friends, and living independently as one ages – are also priorities across lifestages.

People across lifestages say technology impacts their lives greatly, with the exception of Starting Out Non-Techies who may have limited access to technology given lower household income. With regard to health and well-being, there is a clear divide on the role technology plays. People who fall into high technology usage segments – Young Up-and-Coming Techies, Techie Family-Oriented Seniors, and Affluent Techie Families – are more likely than those in other segments to believe that technology has a significant impact on their health.

In terms of satisfaction with available products, difference across lifestage segments exist. While all segments say they are satisfied with products related to one of the top 5 most important areas of life (communication with family and friends), satisfaction with products related to the remaining four (being happy, feeling safe, sleeping well and being comfortable at home) varies. The oldest segments (Techie Family-Oriented Seniors and Steady Empty Nesters) along with Affluent Techie Families are more satisfied with products that help them achieve happiness, feel safe and get a good night's sleep than the other segments. Those who are least satisfied with current products belong to segments with the lowest income levels: Struggling Mature Middle-Aged Non-Traditional Families and Starting Out Non-Techies.

Here, differences also exist in terms of what meaningful innovation means across lifestages. Consistent with the perspective of the overall population, mature and middle-aged segments with families believe innovation will be most meaningful if it addresses all top 10 areas of life – protecting the environment, saving money, stress relief, living independently as one ages, education, preventative health (preventing disease and illness), education, medical treatment, medical diagnosis, workplace efficiency and saving time. However, the youngest and most senior segments have comparatively lower levels of need for products related to those 10 areas.

Lifestage and Technology: A Segmentation Analysis

To look beyond age and identify varying stages of life, a cluster analysis of the overall population surveyed was conducted. This cluster analysis relates to life events that they may have experienced as well as various technology experiences. Through this analysis we identified eight groups of people that exist in varying proportions across our five markets. Each group represents a different lifestage, based on both life experiences and technology. A summary of the key differences across the eight groups is outlined below.

VIII. a. The Segments

	Traditional Families (Segment 1) 13%	Young Up-and-Coming Techies (Segment 2) 15%	Techie Family-Oriented Seniors (Segment 3) 9%	Steady Empty Nesters (Segment 4) 13%	Affluent Techie Families (segment 5) 18%	Struggling Mature Tech-Intermediates (Segment 6) 11%	Middle-Aged Non-Traditional Families (Segment 7) 9%	Starting Out Non-Techies (Segment 8) 13%
Demographics								
Age Skews	25-34 yrs 28% 35-44 yrs 30%	18-24 yrs (42%) 25-34 yrs (28%)	45-54 yrs (23%) 55-64 yrs (26%) 65+ yrs (37%)	55-64 yrs (37%) 65+ yrs (43%)	25-34 yrs (27%) 35-44 yrs (28%) 45-54 yrs (24%)	25-34 yrs (28%) 35-44 yrs (25%)	35-44 yrs (30%) 45-54 yrs (29%)	18-24 yrs (29%) 25-34 yrs (23%)
Gender Skews	None	None	None	None	None	None	None	None
Income	Low to average	Low to average	Low	Low to average	Average to high	Low	Low to average	Low to average
Family Situation	1-2 children under 18 yrs Married, never divorced	No children, Single	Married Mix of previously divorced and first marriages grandparents	No under 18 yr olds at home Married grandparents	1-2 children under 18 yrs Married	Mix of married and singles Mix of parents and non-parents	0-1 children under 18 yrs Divorced and single or Divorced and re-married	Single, no children
Key Moments								
Life	Not living with parents	Live with parents and 1-2 under 18 yrs	Have adult children and 0-1 children under 18 yrs living with them Experienced a mid-life crisis	Provide childcare to grandchildren No mid-life crisis	Not living with parents	0-1 children under 18 yrs living with them	Not living with parents	Live with parents
Health	No serious medical condition	No serious medical condition	Survived a serious medical condition	No serious medical condition	No serious medical condition	No serious medical condition	No serious medical condition	No serious medical condition
Work	Have not changed career or lost a job	Have not changed career or lost a job	Lost a job and made a major career change, retired	Have not changed career or lost a job Retired	Made a major career change	Lost a job and made a major career change	Lost a job and made a major career change	Have not changed career or lost a job
Technology experience	Low	High	High	Medium	High	Medium	Medium	Low

Table 7

VIII. b. Presence in Markets^{6,7}

Affluent Techie Families and Young Up-and-Coming Mostly in China and KSA; Steady Empty Nesters Mainly American Citizens

	Traditional Families (Segment 1) 13%	Young Up-and-Coming Techies (Segment 2) 15%	Techie Family-Oriented Seniors (Segment 3) 9%	Steady Empty Nesters (Segment 4) 13%	Affluent Techie Families (segment 5) 18%	Struggling Mature Tech-Intermediates (Segment 6) 11%	Middle-Aged Non-Traditional Families (Segment 7) 9%	Starting Out Non-Techies (Segment 8) 13%
The Netherlands	24%	15%	26%	19%	6%	27%	21%	29%
USA	16%	15%	21%	36%	9%	20%	20%	19%
Russia	26%	11%	23%	22%	10%	30%	40%	17%
China	21%	28%	13%	14%	39%	12%	7%	22%
KSA	13%	32%	17%	10%	35%	11%	12%	12%

Table 8

		The Netherlands	USA	Russia	China	KSA
Traditional Families (Segment 1)	13%	16%	11%	16%	13%	9%
Young Up-and-Coming Techies (Segment 2)	15%	11%	12%	8%	19%	24%
Techie Family-Oriented Seniors (Segment 3)	9%	12%	10%	10%	5%	8%
Steady Empty Nesters (Segment 4)	13%	13%	25%	14%	9%	7%
Affluent Techie Families(segment 5)	18%	6%	9%	8%	33%	33%
Struggling Mature Tech-Intermediates (Segment 6)	11%	14%	11%	15%	6%	6%
Middle-Aged Non-Traditional Families (Segment 7)	9%	10%	9%	18%	3%	6%
Starting Out Non-Techies (Segment 8)	13%	19%	13%	11%	13%	8%

Table 9

⁶ The percentages in all columns equal 100%.

⁷ Table 8 shows where people in each segment lives; Table 9 shows the propensity of the segments in each market.

VIII. c. Life: What Is Important across the Segments?

Enjoying Life Attributes

Top Priorities Remain Consistent Regardless of Lifestage, Differences Occur With Lower Priorities

Despite the differences in life experience and technology behavior, the most important areas when it comes to attributes that relate to Enjoying Life, remain consistent. Being happy, their homes being comfortable and communication with friends and family are the top three priorities across all segments. The concept of living independently as they age, increases in importance among the senior segments:

Middle-Aged Non-Traditional Families, and Steady Empty Nesters. The exception to this is the Techie Family-Oriented Seniors, potentially indicative that this group is less forward thinking, they have busy family lives, which potentially keeps them focused on the present. Likewise, the importance of entertainment increases among segments that are more technology focused.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Enjoying Life									
Being happy	94%	94%	93%	92%	95%	96%	95%	96%	86%
My home being comfortable to live in	92%	92%	93%	91%	95%	96%	92%	94%	83%
Communication with my family and friends	91%	92%	91%	90%	93%	93%	92%	91%	84%
Personal relationships	90%	91%	90%	90%	92%	92%	93%	92%	82%
Living independently as I age	87%	89%	81%	89%	94%	88%	88%	92%	79%
Entertainment	81%	79%	85%	76%	77%	88%	82%	82%	75%
Being an active part of my local community	69%	66%	70%	70%	71%	81%	63%	64%	58%

Table 10: How important are each of the areas listed below in your life? (TOP 2 BOX: Very important / Somewhat important)

Living Well Attributes

Getting a Good Night's Sleep and Feeling Safe Are Top "Living Well" Priorities

Consistent with the overall population, sleeping well and feeling safe where they live are ranked as the top priorities across all segments. Unsurprisingly, workplace efficiency is not a priority for senior

segments (Steady Empty Nesters and Techie Family-oriented Seniors), though it is a high priority for Affluent Techie Families, alongside the desire to save time.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Living Well									
Sleeping well	93%	93%	91%	91%	96%	96%	94%	95%	85%
Feeling safe where I live	92%	94%	91%	89%	94%	96%	93%	94%	84%
Access to information	88%	89%	88%	83%	90%	92%	90%	92%	80%
Education	86%	87%	90%	79%	83%	94%	87%	90%	77%
Being able to de-stress	85%	86%	85%	81%	82%	92%	88%	83%	78%
Saving money	84%	83%	85%	78%	87%	84%	87%	87%	78%
Protecting the environment	84%	84%	84%	82%	88%	92%	84%	84%	73%
Looking my best	81%	79%	83%	74%	79%	87%	81%	83%	74%
Saving time	80%	78%	85%	71%	75%	91%	80%	80%	70%
Workplace efficiency	77%	77%	85%	64%	62%	89%	81%	82%	72%

Table 11: How important are each of the areas listed below in your life? (TOP 2 BOX: Very important / Somewhat important)

Feeling Healthy Attributes

All Areas of Life Related To Feeling Healthy Are of High Importance Across Most Segments

Nearly all the segments rate all aspects of preventative health, living healthily and health maintenance as very important. Starting Out Non-Techies are the

exception, potentially due to a combination of having youth on their side, and that they have not experienced serious medical conditions.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Feeling Healthy									
Looking after the health of my family	90%	94%	91%	89%	92%	95%	90%	91%	80%
Living a healthy lifestyle	90%	92%	88%	90%	93%	94%	90%	92%	82%
Staying fit and active	90%	90%	89%	89%	92%	94%	91%	91%	81%
Eating healthily	90%	89%	88%	88%	92%	94%	90%	92%	82%
Preventative health	89%	89%	88%	90%	92%	94%	88%	89%	79%
Medical treatment	88%	89%	88%	87%	90%	93%	87%	90%	80%

Table 12: How important are each of the areas listed below in your life? (TOP 2 BOX:Very important / Somewhat important)

VIII. d. Technology and Innovation: Impact of Lifestage

Impact of Technology

Affluent Techie Families Have The Highest Expectations From Technology

Across all segments, there is a strong expectation that technology will improve energy efficiency in the home, while future advancements will change our homes over the next 10 years. However, Affluent Techie

Families are significantly more likely to agree with these statements, while Starting Out Non-Techies are significantly less likely to agree.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
I expect technology to improve energy efficiency in my home	73%	67%	77%	74%	68%	86%	73%	78%	60%
Technological advancements will fundamentally change our homes in the next 10 years	72%	63%	74%	73%	70%	82%	72%	75%	62%
Technology innovations in electric products for my daily personal care routine (e.g. shavers and toothbrushes) have made it easier to take care of my appearance	64%	64%	70%	55%	55%	79%	64%	61%	55%
Better lighting technology used in the area I live in has made me feel safer	50%	41%	58%	52%	45%	66%	44%	42%	41%

Table 13: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements? (TOP 2 BOX: Completely agree / Somewhat agree)

Attitudes to Technology

Across Segments, Technology Plays an Important Role, However, Starting Out Non-Techies Are The Least Positive

The majority of all segments believe that technology has improved their lives and that some innovations have been very meaningful. However, Starting Out

Non-Techies are the least likely to feel this way. Since they are in low income households, potentially limited access to technology is driving this perspective.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Technology has made my life better	74%	68%	80%	72%	72%	86%	73%	78%	59%
Some technology innovations have been very meaningful in my life	73%	69%	81%	73%	67%	86%	73%	74%	58%
The internet has made my life better	71%	67%	80%	61%	64%	85%	68%	74%	60%
I get really excited about the possibilities of new technologies	67%	65%	75%	58%	60%	81%	66%	70%	55%
I am concerned that the proliferation of social media such as Facebook and Twitter reduces my privacy	49%	49%	44%	50%	48%	47%	54%	55%	47%
Social media such as Twitter and Facebook have made my life better	39%	33%	53%	36%	29%	58%	30%	34%	29%
Technology has made life more stressful	33%	29%	35%	33%	33%	33%	36%	33%	34%
I wish there was less technology in my life	27%	22%	22%	33%	29%	26%	31%	33%	25%
Most technology innovation is meaningless to me	24%	24%	21%	31%	28%	20%	25%	23%	27%

Table 14: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements? (TOP 2 BOX: Completely agree / Somewhat agree)

Technology and Health

The Most Tech Savvy Are Also The Ones Most Reliant on Technology for Their Health

When it comes to health, there is some divide in perspectives on the role technology plays among those with higher levels of usage and experience with technology compared with those who do not. Tech segments (Young Up-and Coming Techies, Techie Family-oriented Seniors, and Affluent Techie Families) are all more likely to believe that technology has a significant positive impact on health and well-being,

compared with all other segments. In line with this, Affluent Techie Families and Young Up-and-Coming are most likely to check the internet if they have a health issue or to manage their own health. Interestingly, while Techie Family-oriented Seniors, use technology and believe it has a positive impact on health, their level of usage to manage their health is low, potentially indicating they prefer more traditional means.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Through technology I expect to be able to manage my own health better	64%	60%	71%	61%	63%	79%	60%	60%	52%
When I have a concern about a health issue, I usually check the Internet first	62%	61%	71%	52%	47%	79%	63%	64%	52%
I expect that future innovations in medical technology will mean that serious health issues won't affect me	58%	53%	63%	51%	58%	67%	57%	61%	46%
Technology has a significant positive effect on my sense of health and well-being	56%	48%	61%	59%	57%	73%	49%	50%	44%
Access to medical technology is the most important factor for me to live a long life	48%	41%	52%	47%	49%	64%	39%	42%	39%

Table 15: Thinking about the role of technology in your life, how much do you agree or disagree with the following statements? (TOP 2 BOX: Completely agree / Somewhat agree)

VIII. e. Satisfaction with Current Products by Lifestage

Steady Empty Nesters Are The Most Satisfied Group; However, Satisfaction Is Low Overall

Consistent with the overall population, communication is the area that all segments are most satisfied with. However, among the remaining top five most important areas (home being comfortable, feeling safe, sleeping well and being happy) some differences in satisfaction exist across segments. Regarding their home comfort, the oldest segments (Techie Family-oriented Seniors and Steady Empty Nesters) and the Young Techies are most satisfied. While those most

satisfied with the remaining attributes (being happy, feeling safe and sleeping well) are the two oldest segments alongside the Affluent Techie Families. Overall the most satisfied segment are the Steady Empty Nesters, potentially due to less pressures from work and financial pressure that family can have. Those least satisfied are the segments with the lowest income levels: Struggling Mature, Middle-aged Non-Traditional Families and Starting Out Non-Techies.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Enjoying Life									
Communication with my family and friends	75%	74%	76%	79%	82%	79%	70%	71%	67%
My home being comfortable to live in	70%	68%	71%	77%	77%	70%	64%	66%	64%
Personal relationships	69%	65%	69%	74%	79%	73%	62%	63%	64%
Being happy	67%	65%	69%	71%	73%	74%	59%	58%	62%
Entertainment	66%	63%	71%	66%	70%	69%	66%	59%	62%
Living independently as I age	58%	52%	58%	67%	72%	61%	49%	46%	53%
Being an active part of my local community	54%	47%	53%	62%	65%	58%	48%	44%	51%
Living Well									
Access to information	73%	71%	73%	78%	81%	74%	74%	70%	65%
Looking my best	66%	62%	69%	68%	72%	69%	61%	63%	63%
Feeling safe where I live	66%	62%	67%	68%	72%	71%	59%	59%	63%
Sleeping well	64%	61%	66%	68%	73%	67%	56%	56%	61%
Education	59%	54%	62%	63%	65%	64%	52%	54%	55%
Saving time	58%	52%	63%	59%	63%	63%	51%	49%	55%
Being able to de-stress	54%	51%	54%	62%	64%	55%	48%	45%	52%
Workplace efficiency	53%	51%	59%	52%	53%	62%	46%	45%	51%
Saving money	51%	49%	55%	57%	60%	53%	41%	42%	50%
Protecting the environment	50%	48%	49%	53%	59%	53%	41%	40%	52%

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Feeling Healthy									
Staying fit and active	66%	65%	65%	68%	74%	70%	61%	58%	61%
Looking after the health of my family	65%	62%	62%	72%	75%	70%	57%	58%	62%
Living a healthy lifestyle	64%	60%	61%	70%	74%	67%	58%	57%	62%
Eating healthily	63%	60%	61%	70%	72%	66%	58%	56%	60%
Preventative health	60%	55%	59%	66%	70%	63%	52%	50%	56%
Medical treatment	58%	52%	58%	65%	68%	59%	52%	50%	58%
Medical diagnosis	57%	52%	55%	66%	68%	59%	50%	48%	56%

Table 16: How Satisfied are you with the products now available to you in the following areas?
(TOP 2 BOX: Completely satisfied/Somewhat satisfied)

VIII. f. Is Innovation Meaningful: Philips Innovation Index by Lifestage

Index Scores Are Low Across Segments; However Steady Empty Nesters and Affluent Techie Families Are Doing Better Than Most

Overall, Index scores are low ranging from 61% to just 46%. When we look at the different categories of the Index, the segments are doing least well on the attributes that comprise the Living Well Index. This tells us that satisfaction is low among the segments

on the areas of life that matter most to them. Steady Empty Nesters and Affluent Techie Families tend to be doing better than most, particularly in the areas that relate to Enjoying Life and Feeling Healthy.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Philips Meaningful Innovation Index	54%	51%	54%	56%	61%	60%	48%	48%	46%
Enjoying Life Index	56%	53%	58%	58%	64%	63%	51%	50%	46%
Living Well Index	51%	48%	53%	50%	55%	58%	46%	46%	44%
Feeling Healthy Index	55%	52%	53%	60%	66%	61%	49%	49%	47%

Table 17

VIII. g. Where to Innovate to Be More Meaningful: by Lifestage

Among the 10 areas previously identified as those to focus on to bring meaningful innovation for our overall population, some differences in priorities exist across the segments.

By examining important aspects of people's lives by their net satisfaction with products in each of those areas⁸, we find that the mature and middle-aged segments with families are most in need

of innovations across all 10 areas. Potentially the pressures of family life on stress, time and finances as well as a strong desire to maintain health to be around for their families is driving the needs across such diverse areas.

Interestingly, the youngest and most senior segments tend to have comparatively lower levels of needs across these 10 areas.

	COMBINED TOTAL	Traditional Families (Segment 1)	Young Up-and-Coming Techies (Segment 2)	Techie Family-Oriented Seniors (Segment 3)	Steady Empty Nesters (Segment 4)	Affluent Techie Families (Segment 5)	Struggling Mature Tech-Intermediates (Segment 6)	Middle-aged Non-Traditional Families (Segment 7)	Starting Out Non-Techies (Segment 8)
Enjoying Life									
Living independently as I age	-14%	-22%	-11%	-6%	-2%	-11%	-20%	-24%	-13%
Living Well									
Being able to de-stress	-15%	-18%	-13%	-9%	-10%	-14%	-22%	-15%	-5%
Education	-14%	-18%	-14%	-8%	-8%	-14%	-20%	-14%	-5%
Protecting the environment	-12%	-14%	-11%	-10%	-9%	-10%	-16%	-12%	-4%
Saving money	-10%	-14%	-8%	-8%	-5%	-8%	-13%	-10%	-3%
Saving time	-9%	-16%	-7%	-4%	-1%	-7%	-18%	-9%	-3%
Workplace efficiency	-2%	-5%	-1%	3%	2%	0%	-2%	-2%	-1%
Feeling Healthy									
Preventative health	-13%	-18%	-11%	-5%	-5%	-11%	-16%	-19%	-11%
Medical treatment	-12%	-18%	-12%	-5%	-5%	-13%	-16%	-19%	-10%
Medical Diagnosis	-12%	-17%	-13%	-5%	-7%	-11%	-15%	-19%	-10%

Table 18

⁸ (Survey Question 3 (stated Importance) and Survey Question 5 (Satisfaction): Importance multiplied by net satisfaction (Net Satisfaction = Very Satisfied minus Dissatisfied and Neutral).

IX. If Everyone Were an Inventor, What Would We Create?

IX. a. Inventing for the Future

People Worldwide Desire Improvements to Existing Technology, Increased Access and Futuristic Ingenuity

When asked which types of technology would improve their lives most, people across markets note three specific categories of wants: 1) Improvements to

Current Technologies; 2) Access to Currently-Available Technologies; and 3) The Seemingly Impossible (See Figure 29).

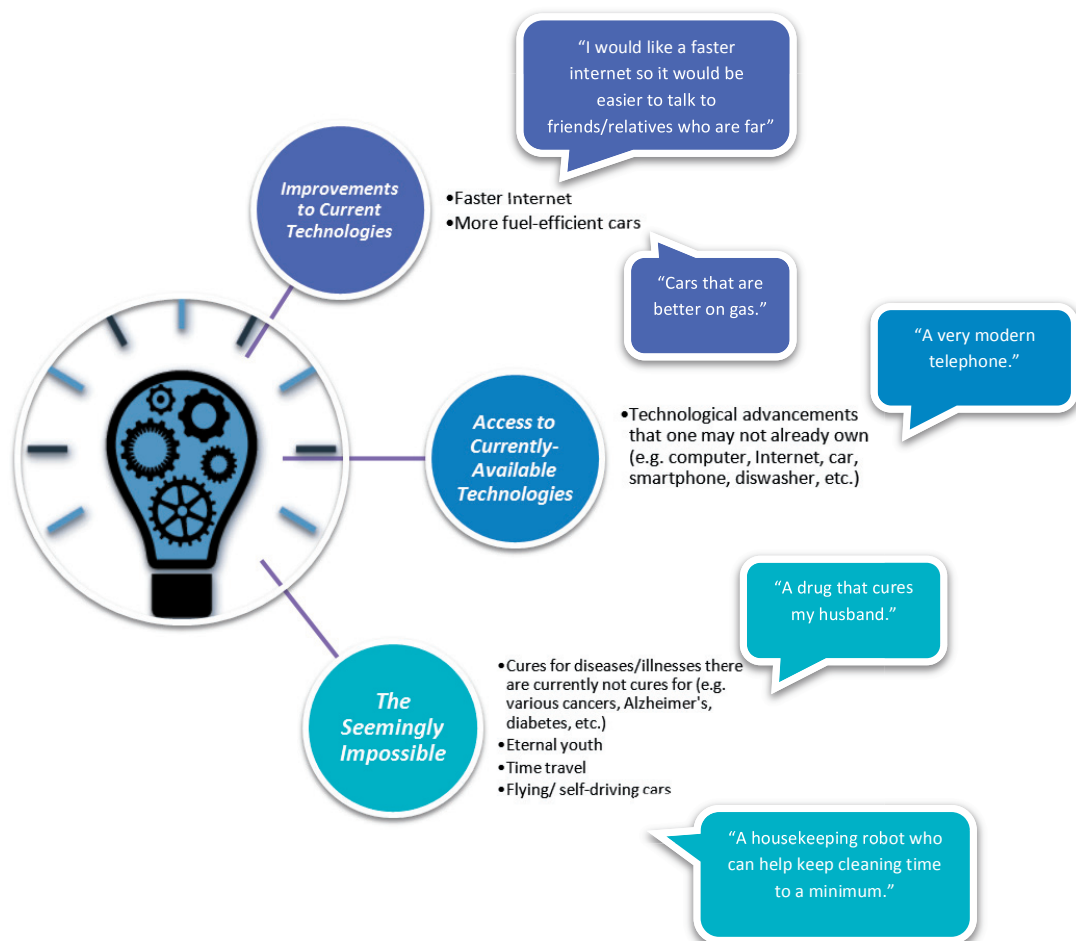


Figure 28: What type of invention (or technology) would improve your life personally most? (OPEN END) What type of invention (or technology) would improve the lives of people you care about most? (OPEN END)

Across each of these three categories, innovations relate to three types of innovations: sustainability; health; and improvement in the quality of life. Those focused on sustainability-related products are driven by a desire to improve the world around them, protect the environment, or save money. People who call for health-

related innovations are often seeking not only to prevent illness and disease but also to cure existing conditions in themselves and those they care about most. Lastly, those focused on innovations that will improve the quality of life are fundamentally driven by a desire to make life easier for themselves and their loved ones.

IX. b. Inventing for the Future: Age

Younger Generations Look to Products to Keep Them Young and Plugged In; Older Population Wants to Save Time and Make Life Easier

While desires for innovations in health and well-being are strong across all age groups, interesting differences exist. People aged 18-24 or 25-39 are looking for improvements and increased access to available technologies like the internet, smartphones, wi-fi enabled tablets, etc. to help them remain on the cutting edge of technology, information and entertainment. They are also more likely than their

older counterparts to desire teleportation technology as well as products to keep them eternally young. On the other hand, people over the age of 40 tend to be more aware of time. Therefore, they desire products that not only help them save as much as possible – such as housekeeping robots and flying cars – but also enable them to turn it backwards or forward (e.g. time machines).

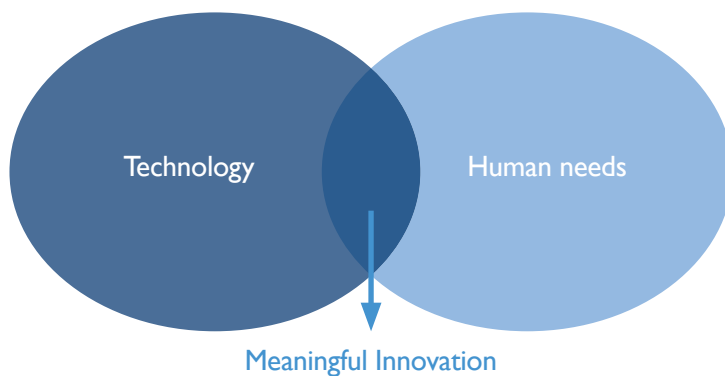
IX. c. Inventing for the Future: Lifestages

Steady Empty Nesters and Affluent Techie Families Are Health-Conscious and Look for Innovations in Medical Tech and The Development of Cures Against Illnesses Plaguing Themselves and Their Loved Ones

Affluent Techie Families are looking for companies to innovate in healthcare, noting that they would like to see more medical technological advancements leading to improved healthcare systems. They are also looking for products to make their lives easier, including housekeeping robots. Both Steady Empty Nesters and Young Up-and-Coming Techies look for improvements in existing technologies (i.e. better computers/tablets,

more energy-efficient cars), while the Traditional Families segment hopes that access to electronics – specifically for the home – will increase in the future. With regard to the “seemingly impossible” category, Struggling Mature Tech Intermediates say they want time machines and teleportation devices while Techie Family-Oriented Seniors look for companies to invent a fountain of youth to keep them younger for longer.

X. Conclusion



Looking into where life and human needs intersect with technology, and how the link between the two leads to Meaningful Innovation, we find that there is room for innovation in many key areas of life. The most important aspects of everyday life for our surveyed population are those which contribute to overall well-being and are basic human needs: being happy, sleeping well, a comfortable home to live in, a sense of safety at home, and communication with friends and family. These fundamental needs unite our overall population regardless of age, lifestage or the country they live in.

With regard to technology, most people believe that technology and the Internet have made life better and expect that technology will continue to play a key role in their lives in the future. In particular, there are high expectations that the future will bring innovation to their homes and their health. While it is no surprise young people are more technologically “plugged in” than their older counterparts, older generations have begun to tap them as a source of knowledge on technologies. However, citizens of the Netherlands have a significantly lower affinity for technology as they are less likely to think that technology and the Internet has made their lives better.

Across markets, satisfaction with products related to communicating with family and friends, feeling comfortable at home, and accessing information is highest. However, people surveyed are not as satisfied with products in other areas and slight differences in satisfaction exist across age groups, lifestages and market. The Philips Meaningful Innovation Index shows that citizens of the Netherlands, China and the Kingdom of Saudi Arabia (KSA) share a low

satisfaction with products across areas of life, while American citizens are more likely the overall population to be satisfied with products in all areas and Russian citizens are less likely to be satisfied with products that help them live well and feel healthy. Overall, when thinking of priorities for future innovations, people of all age groups, lifestages and markets are expecting to see innovations in the top five areas they ranked as most important in their lives. Additionally, technology for preventative health as well as to improve and maintain health is also strongly prioritized. Across our overall population surveyed, the Philips Meaningful Innovation Index score is just 54%. While there are slight differences in terms of what innovation that is meaningful means across lifestages, satisfaction with currently-available technology in the 10 most important areas of life is low overall, regardless of age, lifestage or country of origin.

Innovation, as we continue to see, is a core ingredient of economic health, business performance, and continual improvements in health and well-being. In this report, we have sought to uncover the people's view of what constitutes Meaningful Innovation. To determine where to prioritize future innovation to deliver products that will be meaningful to people's lives and drive up these Index scores, we examined the intersection between priority areas of life and satisfaction with currently-available technology. In doing so, we find that people of all ages and lifestages across key markets, believe that meaningful innovation should seek to help them protect the environment, save money, live independently as they age, release stress, and educate themselves. In addition, health and well-being innovations also needed and expected, including products to prevent, diagnose and treat medical conditions.

XI. Appendix A: Posted Questionnaire

Screener:

QSI. What year were you born?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
NET: 18-24	14%	11%	13%	15%	12%	22%
18-20	5%	4%	7%	4%	3%	6%
21-24	10%	7%	6%	11%	8%	16%
NET: 25-39	31%	23%	26%	32%	31%	45%
25-29	11%	8%	10%	9%	10%	16%
30-39	21%	15%	16%	23%	21%	29%
NET: 40-64	40%	46%	44%	40%	42%	29%
40-49	18%	18%	17%	17%	19%	19%
50-59	17%	21%	19%	20%	16%	8%
60-64	6%	8%	8%	4%	6%	3%
NET: 65+	14%	21%	17%	12%	16%	5%
65-79	12%	19%	12%	9%	16%	4%
80+	2%	1%	5%	3%	-	*%

QS2. Are you...?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Female	50%	51%	51%	49%	55%	44%
Male	50%	49%	49%	51%	45%	56%

QS3. Do you reside in...?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
China	22%	-	-	100%	-	-
Russia	21%	-	-	-	100%	-
The Kingdom of Saudi Arabia	19%	-	-	-	-	100%
The Netherlands	20%	100%	-	-	-	-
USA	19%	-	100%	-	-	-

QS4. _USA. Which of the following categories best describes your annual household income before taxes?

USA	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1001	-	1001	-	-	-
Under \$25,000	20%	-	20%	-	-	-
\$25,000 to less than \$50,000	24%	-	24%	-	-	-
\$50,000 to less than \$75,000	16%	-	16%	-	-	-
\$75,000 to less than \$100,000	9%	-	9%	-	-	-
\$100,000 to less than \$150,000	9%	-	9%	-	-	-
\$150,000 to less than \$200,000	3%	-	3%	-	-	-
\$200,000 or more	2%	-	2%	-	-	-
Prefer not to say	16%	-	16%	-	-	-

QS4_NETH. Which of the following categories best describes your annual household income before taxes?

The Netherlands	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1029	1029	-	-	-	-
Less than 20,000 euros	19%	19%	-	-	-	-
20,000 to less than 40,000 euros	30%	30%	-	-	-	-
40,000 to less than 60,000 euros	20%	20%	-	-	-	-
60,000 to less than 80,000 euros	10%	10%	-	-	-	-
80,000 to less than 100,000 euros	2%	2%	-	-	-	-
100,000 euros or more	2%	2%	-	-	-	-
Prefer not to say	17%	17%	-	-	-	-

QS4_CHINA. Which of the following comes closest to your household annual income in yuan?

China	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1126	-	-	1126	-	-
Less than 5000	5%	-	-	5%	-	-
5,000-9,999	4%	-	-	4%	-	-
10,000-24,999	7%	-	-	7%	-	-
25,000-49,999	7%	-	-	7%	-	-
50,000-74,999	10%	-	-	10%	-	-
75,000-99,999	17%	-	-	17%	-	-
100,000-124,999	16%	-	-	16%	-	-
125,000-149,999	10%	-	-	10%	-	-
150,000 and above	20%	-	-	20%	-	-
Prefer not to say	5%	-	-	5%	-	-

QS4_RUSS. Which of the following categories best describes your annual household income before taxes?

Russia	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1081	-	-	-	1081	-
Less than 750,000 rubles	70%	-	-	-	70%	-
750,000 to less than 1.5 million rubles	16%	-	-	-	16%	-
1.5 million to less than 2.2 million rubles	4%	-	-	-	4%	-
2.2 million to less than 3 million rubles	2%	-	-	-	2%	-
3 million to less than 4.5 million rubles	1%	-	-	-	1%	-
4.5 million to less than 6 million rubles	*%	-	-	-	*%	-
6 million rubles or more	1%	-	-	-	1%	-
Prefer not to say	6%	-	-	-	6%	-

QS4_SA. Which of the following categories best describes your annual household income before taxes?

Saudi Arabia	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1000	-	-	-	-	1000
Less than 3,499	21%	-	-	-	-	21%
3,500 to 5,999	10%	-	-	-	-	10%
6,000 to 9,999	18%	-	-	-	-	18%
10,000 to 14,999	13%	-	-	-	-	13%
15,000 to 29,999	7%	-	-	-	-	7%
30,000 or More	10%	-	-	-	-	10%
Prefer not to say	20%	-	-	-	-	20%

Life stage

I. For each event, please indicate if it's something you have experienced up to this point in your life.

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Moving out of your parent's home	67%	76%	74%	56%	72%	61%
Having children	63%	56%	65%	65%	69%	57%
Adopting a new technology that has changed your life	61%	50%	46%	63%	73%	73%
Getting married for the first time	61%	56%	59%	61%	66%	62%
Communicating with close friends/family more often via internet technology than in-person	59%	43%	51%	71%	51%	78%
Watching/listening to entertainment content (e.g. movies, radio, TV) on-demand more often than live as it is broadcast	50%	35%	52%	72%	28%	64%
Having a parent die	46%	56%	53%	30%	51%	41%
Making a major career change	44%	40%	36%	51%	48%	46%
Having a teenager / young adult show you how to use a new technology	42%	42%	46%	42%	38%	44%
Losing a job	33%	45%	37%	19%	44%	23%
Having the last of your children move out	25%	29%	33%	22%	26%	15%
Becoming a grandparent	24%	26%	37%	13%	24%	19%
Surviving a serious medical condition	23%	25%	33%	10%	25%	21%
Midlife crisis	21%	20%	14%	23%	26%	22%
Changing your diet due to a serious medical condition	20%	18%	26%	16%	16%	22%
Moving back into your parent's home	19%	15%	15%	16%	20%	29%
Getting a divorce	19%	25%	22%	7%	30%	10%
Retiring	19%	17%	29%	17%	24%	7%
Providing childcare to grandchildren on a regular basis	15%	20%	16%	18%	10%	13%
Remarrying	14%	11%	18%	7%	23%	10%
Having an adult child move back home	13%	12%	18%	12%	8%	14%
Having a spouse die	9%	10%	12%	4%	8%	9%

The Role of Technology

2. Thinking about the role of technology in your life, how much do you agree or disagree with the following statements.

**SUMMARY TABLE
TOP 2 BOX – AGREE**
■ = Top 5 answers by country

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Technology has made my life better	74%	46%	79% ■	88% ■	82% ■	74% ■
I expect technology to improve energy efficiency in my home	73%	54% ■	80% ■	86% ■	73% ■	73% ■
Some technology innovations have been very meaningful in my life	73%	49% ■	82% ■	89% ■	73% ■	71% ■
Technological advancements will fundamentally change our homes in the next 10 years	72%	54% ■	81% ■	70%	78% ■	77% ■
The internet has made my life better	71%	46%	67% ■	88% ■	80% ■	73% ■
I get really excited about the possibilities of new technologies	67%	36%	62%	79%	89%	69%
Through technology I expect to be able to manage my own health better	64%	31%	67% ■	85% ■	70%	66%
Technology innovations in electric products for my daily personal care routine (e.g. shavers and toothbrushes) have made it easier to take care of my appearance	64%	49% ■	64%	79%	61%	66%
When I have a concern about a health issue, I usually check the internet first	62%	54% ■	49%	81%	60%	67%
I expect that future innovations in medical technology will mean that serious health issues won't affect me	58%	33%	51%	77%	71%	54%
Technology has a significant positive effect on my sense of health and well-being	56%	32%	61%	81%	42%	64%
Better lighting technology used in the area I live in has made me feel safer	50%	32%	52%	70%	37%	58%
I am concerned that the proliferation of social media such as Facebook and Twitter reduces my privacy	49%	45%	61%	43%	52%	44%
Access to medical technology is the most important factor for me to live a long life	48%	31%	63%	64%	27%	54%
Social media such as twitter, and Facebook have made my life better	39%	17%	32%	57%	38%	50%
Technology has made life more stressful	33%	42%	45%	34%	8%	38%
I wish there was less technology in my life	27%	18%	33%	20%	36%	28%
Most technology innovation is meaningless to me	24%	26%	29%	19%	23%	25%
Providing childcare to grandchildren on a regular basis	15%	20%	16%	18%	10%	13%
Remarrying	14%	11%	18%	7%	23%	10%
Having an adult child move back home	13%	12%	18%	12%	8%	14%
Having a spouse die	9%	10%	12%	4%	8%	9%

**SUMMARY TABLE
BOTTOM 2 BOX - DISAGREE**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Most technology innovation is meaningless to me	54%	38%	63%	61%	55%	52%
I wish there was less technology in my life	49%	38%	58%	63%	41%	43%
Technology has made life more stressful	42%	21%	47%	33%	78%	31%
Social media such as twitter, and Facebook have made my life better	31%	47%	53%	6%	31%	22%
Access to medical technology is the most important factor for me to live a long life	25%	25%	29%	9%	43%	18%
I am concerned that the proliferation of social media such as Facebook and Twitter reduces my privacy	23%	23%	29%	19%	20%	27%
When I have a concern about a health issue, I usually check the internet first	23%	24%	46%	4%	26%	16%
Better lighting technology used in the area I live in has made me feel safer	20%	23%	32%	5%	32%	11%
I expect that future innovations in medical technology will mean that serious health issues won't affect me	19%	27%	38%	4%	14%	16%
Technology has a significant positive effect on my sense of health and well-being	18%	22%	28%	3%	26%	11%
Technology innovations in electric products for my daily personal care routine (e.g. shavers and toothbrushes) have made it easier to take care of my appearance	15%	19%	27%	2%	18%	11%
Through technology I expect to be able to manage my own health better	14%	24%	24%	3%	10%	11%
I get really excited about the possibilities of new technologies	14%	26%	31%	3%	4%	9%
The internet has made my life better	12%	20%	23%	2%	8%	10%
I expect technology to improve energy efficiency in my home	10%	12%	14%	2%	13%	8%
Technology has made my life better	9%	17%	16%	2%	6%	8%
Some technology innovations have been very meaningful in my life	9%	14%	12%	2%	11%	9%
Technological advancements will fundamentally change our homes in the next 10 years	9%	12%	12%	5%	9%	7%

Innovation

3. How important are each of the areas listed below in your life?

**SUMMARY TABLE
TOP BOX - VERY IMPORTANT**

■ = Top 5 important areas overall
■ = Top 5 answers by country

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Being happy	70%	69%	83%	61%	67%	71%
Looking after the health of my family	64%	50%	80%	49%	72%	70%
Feeling safe where I live	63%	48%	82%	50%	68%	71%
Sleeping well	62%	55%	75%	55%	63%	62%
My home being comfortable to live in	60%	39%	80%	46%	72%	66%
Communication with my family and friends	57%	48%	78%	39%	61%	62%
Living a healthy lifestyle	56%	37%	74%	61%	54%	54%
Living independently as I age	56%	51%	77%	43%	60%	48%
Education	55%	35%	78%	42%	53%	71%
Preventative health (preventing disease and illness)	55%	37%	75%	48%	50%	68%
Eating healthily	55%	39%	70%	56%	52%	56%
Personal relationships	54%	53%	70%	38%	54%	57%
Medical treatment	53%	41%	73%	43%	46%	61%
Staying fit and active	52%	42%	68%	45%	52%	57%
Being able to de-stress	49%	36%	65%	40%	47%	57%
Medical diagnosis	47%	33%	68%	33%	44%	56%
Protecting the environment	46%	26%	62%	49%	42%	53%
Access to information	46%	28%	62%	31%	57%	55%
Saving money	44%	28%	70%	25%	40%	60%
Looking my best	38%	17%	45%	26%	50%	54%
Workplace efficiency	38%	18%	50%	34%	33%	57%
Saving time	38%	12%	49%	31%	42%	56%
Entertainment	31%	22%	31%	29%	36%	39%
Being an active part of my local community	27%	11%	39%	20%	21%	47%

**SUMMARY TABLE
BOTTOM BOX - NOT AT
ALL IMPORTANT**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Workplace efficiency	3%	6%	7%	-	3%	1%
Being an active part of my local community	3%	4%	6%	*%	2%	2%
Saving time	2%	4%	3%	*%	1%	1%
Looking my best	2%	3%	4%	*%	1%	1%
Entertainment	2%	1%	5%	*%	2%	1%
Living independently as I age	1%	1%	2%	*%	1%	3%
Education	1%	3%	2%	-	2%	1%
Protecting the environment	1%	2%	2%	*%	1%	1%
Being able to de-stress	1%	2%	2%	*%	2%	1%
Saving money	1%	1%	2%	*%	2%	1%
Medical diagnosis	1%	2%	1%	*%	1%	2%
Looking after the health of my family	1%	2%	2%	*%	1%	1%
Personal relationships	1%	1%	2%	*%	1%	1%
Eating healthily	1%	1%	2%	*%	1%	1%
Medical treatment	1%	1%	1%	*%	1%	1%
Access to information	1%	1%	1%	*%	1%	1%
Sleeping well	1%	1%	1%	*%	1%	1%
Staying fit and active	1%	1%	1%	*%	1%	1%
Communication with my family and friends	1%	1%	1%	*%	1%	1%
My home being comfortable to live in	1%	1%	1%	*%	1%	2%
Feeling safe where I live	1%	1%	2%	*%	1%	1%
Preventative health (preventing disease and illness)	1%	1%	1%	*%	1%	1%
Being happy	1%	1%	1%	-	1%	1%
Living a healthy lifestyle	1%	1%	1%	*%	1%	1%

**SUMMARY TABLE
TOP 2 BOX - IMPORTANT**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Being happy	94%	93%	97%	95%	94%	90%
Sleeping well	93%	91%	95%	94%	94%	89%
Feeling safe where I live	92%	88%	96%	93%	94%	90%
My home being comfortable to live in	92%	86%	97%	92%	95%	89%
Communication with my family and friends	91%	85%	98%	90%	93%	88%
Looking after the health of my family	90%	81%	94%	93%	95%	88%
Living a healthy lifestyle	90%	85%	96%	94%	90%	86%
Personal relationships	90%	89%	93%	89%	92%	88%
Staying fit and active	90%	85%	93%	91%	92%	87%
Eating healthily	90%	84%	94%	94%	89%	85%
Preventative health (preventing disease and illness)	89%	81%	96%	92%	87%	87%
Medical treatment	88%	83%	95%	91%	86%	86%
Access to information	88%	78%	95%	86%	94%	88%
Living independently as I age	87%	88%	95%	86%	88%	78%
Education	86%	70%	95%	89%	89%	88%
Medical diagnosis	85%	75%	94%	89%	85%	83%
Being able to de-stress	85%	74%	92%	91%	83%	84%
Protecting the environment	84%	71%	92%	92%	83%	84%
Saving money	84%	77%	95%	74%	86%	88%
Entertainment	81%	74%	83%	82%	83%	83%
Looking my best	81%	60%	87%	83%	89%	84%
Saving time	80%	54%	88%	86%	84%	86%
Workplace efficiency	77%	62%	80%	88%	75%	81%
Being an active part of my local community	69%	48%	82%	69%	61%	83%

**SUMMARY TABLE
BOTTOM 2 BOX - NOT IMPORTANT**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Being an active part of my local community	10%	18%	11%	5%	13%	6%
Workplace efficiency	7%	11%	9%	1%	9%	6%
Entertainment	6%	5%	12%	3%	7%	5%
Looking my best	6%	12%	8%	2%	4%	4%
Saving time	6%	12%	8%	2%	5%	4%
Saving money	5%	4%	4%	5%	6%	4%
Being able to de-stress	4%	6%	5%	1%	6%	3%
Education	4%	8%	3%	2%	4%	4%
Protecting the environment	4%	6%	4%	1%	5%	4%
Living independently as I age	4%	2%	3%	3%	3%	7%
Medical diagnosis	4%	4%	3%	1%	5%	5%
Staying fit and active	3%	3%	4%	1%	3%	5%
Medical treatment	3%	4%	2%	1%	4%	4%
Eating healthily	3%	2%	4%	1%	3%	4%
Personal relationships	3%	2%	6%	1%	3%	2%
Looking after the health of my family	3%	3%	3%	1%	2%	3%
Access to information	3%	4%	3%	1%	2%	3%
Preventative health (preventing disease and illness)	3%	3%	2%	1%	3%	4%
Living a healthy lifestyle	2%	3%	3%	1%	3%	3%
Communication with my family and friends	2%	3%	2%	1%	3%	3%
Sleeping well	2%	2%	3%	1%	2%	4%
Feeling safe where I live	2%	3%	2%	1%	2%	2%
My home being comfortable to live in	2%	2%	1%	1%	1%	4%
Being happy	2%	1%	2%	1%	2%	3%

4. As companies continue to create new products and services in the future, how important are innovations in the following areas to you?

**SUMMARY TABLE
TOP BOX - VERY IMPORTANT**

■ = Top 5 important areas overall (Q3)
■ = Top 5 answers by country

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Being happy	62%	56%	69%	58%	59%	68%
Looking after the health of my family	61%	47%	70%	52%	67%	71%
Sleeping well	58%	50%	64%	54%	60%	65%
Feeling safe where I live	58%	41%	67%	48%	65%	72%
My home being comfortable to live in	57%	35%	67%	48%	67%	68%
Preventative health (preventing disease and illness)	56%	42%	65%	52%	56%	67%
Medical treatment	56%	46%	68%	48%	54%	66%
Living a healthy lifestyle	55%	41%	64%	57%	55%	58%
Eating healthily	54%	40%	61%	56%	55%	59%
Living independently as I age	53%	48%	63%	44%	59%	53%
Education	53%	35%	69%	43%	49%	68%
Staying fit and active	53%	41%	59%	48%	53%	63%
Communication with my family and friends	52%	40%	66%	40%	54%	62%
Medical diagnosis	52%	40%	64%	43%	54%	61%
Personal relationships	48%	42%	59%	36%	47%	57%
Being able to de-stress	48%	35%	56%	41%	48%	59%
Access to information	47%	33%	56%	32%	56%	60%
Protecting the environment	47%	30%	56%	49%	43%	56%
Saving money	46%	31%	62%	30%	47%	62%
Saving time	41%	20%	48%	33%	46%	62%
Looking my best	40%	21%	43%	30%	50%	55%
Workplace efficiency	40%	22%	46%	35%	38%	59%
Entertainment	35%	23%	31%	34%	39%	46%
Being an active part of my local community	32%	15%	39%	28%	28%	50%

**SUMMARY TABLE
BOTTOM BOX - NOT IMPORTANT
AT ALL**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Being an active part of my local community	3%	6%	5%	*%	3%	2%
Workplace efficiency	3%	5%	5%	*%	3%	2%
Looking my best	2%	4%	3%	1%	2%	1%
Saving time	2%	4%	3%	*%	2%	2%
Entertainment	2%	2%	5%	1%	2%	1%
Being able to de-stress	2%	2%	2%	*%	2%	2%
Personal relationships	2%	2%	4%	*%	1%	1%
Education	2%	3%	2%	*%	1%	*%
Protecting the environment	1%	2%	2%	*%	2%	1%
Living independently as I age	1%	1%	2%	*%	1%	3%
Saving money	1%	1%	2%	*%	2%	1%
Being happy	1%	2%	2%	*%	2%	1%
Looking after the health of my family	1%	2%	2%	*%	1%	1%
Communication with my family and friends	1%	2%	2%	*%	1%	1%
Access to information	1%	1%	2%	*%	1%	1%
Living a healthy lifestyle	1%	2%	2%	*%	1%	1%
Eating healthily	1%	1%	2%	*%	2%	1%
Medical diagnosis	1%	2%	1%	1%	1%	1%
Sleeping well	1%	1%	2%	*%	1%	1%
Preventative health (preventing disease and illness)	1%	1%	1%	1%	2%	1%
Medical treatment	1%	1%	1%	*%	1%	1%
Staying fit and active	1%	1%	2%	*%	1%	1%
My home being comfortable to live in	1%	2%	1%	*%	1%	1%
Feeling safe where I live	1%	1%	1%	*%	1%	1%

**SUMMARY TABLE
TOP 2 BOX - IMPORTANT**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Feeling safe where I live	89%	81%	87%	93%	93%	90%
My home being comfortable to live in	89%	80%	88%	93%	93%	88%
Being happy	88%	82%	87%	94%	90%	89%
Looking after the health of my family	88%	79%	88%	91%	93%	87%
Medical treatment	88%	84%	89%	92%	87%	86%
Preventative health (preventing disease and illness)	88%	82%	89%	93%	89%	86%
Sleeping well	88%	82%	87%	93%	89%	86%
Living a healthy lifestyle	88%	81%	88%	93%	89%	86%
Eating healthily	87%	82%	87%	93%	89%	85%
Communication with my family and friends	87%	79%	89%	92%	89%	88%
Staying fit and active	87%	81%	86%	91%	90%	84%
Medical diagnosis	86%	80%	88%	90%	88%	85%
Living independently as I age	86%	84%	87%	89%	86%	82%
Access to information	86%	77%	86%	86%	92%	86%
Personal relationships	84%	79%	85%	88%	85%	85%
Saving money	84%	76%	87%	82%	87%	87%
Education	84%	69%	87%	89%	86%	87%
Protecting the environment	83%	74%	86%	91%	82%	83%
Being able to de-stress	83%	72%	84%	92%	82%	85%
Saving time	81%	62%	83%	86%	86%	86%
Entertainment	79%	68%	77%	85%	81%	82%
Looking my best	79%	59%	81%	82%	86%	84%
Workplace efficiency	77%	65%	77%	86%	75%	82%
Being an active part of my local community	70%	54%	77%	73%	63%	84%

**SUMMARY TABLE
BOTTOM BOX - NOT IMPORTANT
AT ALL**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Being an active part of my local community	3%	6%	5%	*%	3%	2%
Workplace efficiency	3%	5%	5%	*%	3%	2%
Looking my best	2%	4%	3%	1%	2%	1%
Saving time	2%	4%	3%	*%	2%	2%
Entertainment	2%	2%	5%	1%	2%	1%
Being able to de-stress	2%	2%	2%	*%	2%	2%
Personal relationships	2%	2%	4%	*%	1%	1%
Education	2%	3%	2%	*%	1%	*%
Protecting the environment	1%	2%	2%	*%	2%	1%
Living independently as I age	1%	1%	2%	*%	1%	3%
Saving money	1%	1%	2%	*%	2%	1%
Being happy	1%	2%	2%	*%	2%	1%
Looking after the health of my family	1%	2%	2%	*%	1%	1%
Communication with my family and friends	1%	2%	2%	*%	1%	1%
Access to information	1%	1%	2%	*%	1%	1%
Living a healthy lifestyle	1%	2%	2%	*%	1%	1%
Eating healthily	1%	1%	2%	*%	2%	1%
Medical diagnosis	1%	2%	1%	1%	1%	1%
Sleeping well	1%	1%	2%	*%	1%	1%
Preventative health (preventing disease and illness)	1%	1%	1%	1%	2%	1%
Medical treatment	1%	1%	1%	*%	1%	1%
Staying fit and active	1%	1%	2%	*%	1%	1%
My home being comfortable to live in	1%	2%	1%	*%	1%	1%
Feeling safe where I live	1%	1%	1%	*%	1%	1%

**SUMMARY TABLE
TOP 2 BOX - IMPORTANT**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Feeling safe where I live	89%	81%	87%	93%	93%	90%
My home being comfortable to live in	89%	80%	88%	93%	93%	88%
Being happy	88%	82%	87%	94%	90%	89%
Looking after the health of my family	88%	79%	88%	91%	93%	87%
Medical treatment	88%	84%	89%	92%	87%	86%
Preventative health (preventing disease and illness)	88%	82%	89%	93%	89%	86%
Sleeping well	88%	82%	87%	93%	89%	86%
Living a healthy lifestyle	88%	81%	88%	93%	89%	86%
Eating healthily	87%	82%	87%	93%	89%	85%
Communication with my family and friends	87%	79%	89%	92%	89%	88%
Staying fit and active	87%	81%	86%	91%	90%	84%
Medical diagnosis	86%	80%	88%	90%	88%	85%
Living independently as I age	86%	84%	87%	89%	86%	82%
Access to information	86%	77%	86%	86%	92%	86%
Personal relationships	84%	79%	85%	88%	85%	85%
Saving money	84%	76%	87%	82%	87%	87%
Education	84%	69%	87%	89%	86%	87%
Protecting the environment	83%	74%	86%	91%	82%	83%
Being able to de-stress	83%	72%	84%	92%	82%	85%
Saving time	81%	62%	83%	86%	86%	86%
Entertainment	79%	68%	77%	85%	81%	82%
Looking my best	79%	59%	81%	82%	86%	84%
Workplace efficiency	77%	65%	77%	86%	75%	82%
Being an active part of my local community	70%	54%	77%	73%	63%	84%

**SUMMARY TABLE
BOTTOM 2 BOX - NOT IMPORTANT**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Being an active part of my local community	10%	17%	11%	3%	13%	5%
Workplace efficiency	7%	12%	7%	1%	9%	7%
Entertainment	7%	8%	10%	3%	7%	6%
Looking my best	6%	13%	6%	3%	5%	5%
Saving time	5%	10%	6%	2%	5%	4%
Personal relationships	5%	6%	5%	2%	5%	4%
Being able to de-stress	5%	6%	4%	2%	6%	5%
Education	4%	9%	4%	1%	5%	3%
Saving money	4%	5%	3%	3%	5%	4%
Protecting the environment	4%	6%	4%	1%	5%	4%
Sleeping well	3%	5%	4%	1%	3%	4%
Living independently as I age	3%	2%	3%	1%	4%	6%
Communication with my family and friends	3%	5%	2%	1%	4%	4%
Eating healthily	3%	3%	3%	1%	4%	4%
Medical diagnosis	3%	4%	2%	1%	4%	4%
Being happy	3%	5%	3%	1%	4%	3%
Living a healthy lifestyle	3%	4%	3%	1%	4%	4%
Access to information	3%	4%	4%	2%	2%	3%
Looking after the health of my family	3%	5%	3%	1%	2%	4%
Medical treatment	3%	3%	2%	1%	4%	4%
Staying fit and active	3%	3%	3%	1%	4%	3%
Feeling safe where I live	3%	4%	3%	1%	2%	3%
Preventative health (preventing disease and illness)	3%	3%	2%	1%	3%	3%
My home being comfortable to live in	3%	4%	2%	1%	2%	3%

5. How satisfied are you with the products now available to you in the following areas?

**SUMMARY TABLE
TOP BOX - COMPLETELY SATISFIED**

■ = Top 5 important areas overall (Q3)
■ = Top 5 answers by country

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Communication with my family and friends	26%	20%	39%	20%	19%	32%
Access to information	23%	16%	32%	14%	23%	30%
My home being comfortable to live in	23%	16%	36%	16%	18%	29%
Being happy	22%	17%	34%	19%	13%	29%
Personal relationships	22%	20%	32%	15%	14%	28%
Feeling safe where I live	22%	16%	37%	14%	11%	33%
Sleeping well	21%	16%	29%	18%	14%	27%
Looking after the health of my family	20%	16%	31%	16%	12%	28%
Staying fit and active	20%	15%	30%	17%	16%	24%
Eating healthily	20%	17%	30%	16%	12%	26%
Living a healthy lifestyle	19%	14%	31%	16%	14%	24%
Entertainment	19%	12%	25%	16%	16%	24%
Medical treatment	19%	14%	31%	16%	8%	25%
Looking my best	18%	12%	27%	13%	16%	25%
Education	18%	11%	28%	13%	14%	26%
Living independently as I age	18%	15%	32%	14%	8%	22%
Preventative health (preventing disease and illness)	18%	12%	28%	16%	8%	25%
Medical diagnosis	17%	12%	29%	12%	9%	24%
Being able to de-stress	16%	12%	25%	15%	11%	20%
Saving time	16%	9%	24%	15%	11%	23%
Being an active part of my local community	16%	11%	22%	14%	10%	23%
Saving money	15%	9%	25%	12%	8%	22%
Workplace efficiency	15%	8%	22%	13%	9%	21%
Protecting the environment	14%	8%	24%	12%	7%	20%

**SUMMARY TABLE
BOTTOM BOX - NOT SATISFIED
AT ALL**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Protecting the environment	7%	4%	3%	6%	13%	9%
Saving money	6%	4%	3%	3%	10%	8%
Medical treatment	5%	2%	2%	4%	13%	5%
Education	5%	2%	3%	5%	9%	7%
Medical diagnosis	5%	2%	2%	4%	9%	6%
Eating healthily	4%	2%	2%	5%	9%	4%
Living independently as I age	4%	2%	1%	3%	11%	5%
Workplace efficiency	4%	3%	3%	2%	6%	7%
Being able to de-stress	4%	4%	3%	3%	6%	5%
Preventative health (preventing disease and illness)	4%	2%	1%	3%	9%	4%
Feeling safe where I live	3%	2%	1%	2%	8%	4%
Sleeping well	3%	4%	3%	2%	4%	5%
Saving time	3%	2%	2%	2%	4%	6%
Being an active part of my local community	3%	2%	2%	2%	3%	5%
Being happy	3%	4%	1%	1%	5%	3%
Looking after the health of my family	3%	2%	2%	1%	5%	5%
My home being comfortable to live in	3%	2%	1%	3%	3%	4%
Personal relationships	3%	3%	2%	1%	4%	3%
Entertainment	3%	2%	2%	1%	4%	5%
Staying fit and active	3%	2%	2%	1%	3%	5%
Living a healthy lifestyle	2%	2%	1%	2%	4%	4%
Looking my best	2%	3%	1%	1%	3%	3%
Communication with my family and friends	2%	3%	*%	1%	2%	3%
Access to information	2%	2%	1%	1%	2%	3%

**SUMMARY TABLE
TOP 2 BOX - SATISFIED**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Communication with my family and friends	75%	75%	89%	68%	70%	75%
Access to information	73%	77%	85%	59%	73%	73%
My home being comfortable to live in	70%	72%	87%	59%	63%	69%
Personal relationships	69%	75%	82%	63%	58%	68%
Being happy	67%	70%	84%	62%	51%	69%
Looking my best	66%	64%	81%	57%	64%	66%
Entertainment	66%	70%	82%	59%	56%	64%
Feeling safe where I live	66%	73%	85%	59%	42%	74%
Staying fit and active	66%	68%	81%	60%	59%	61%
Looking after the health of my family	65%	70%	82%	62%	47%	66%
Sleeping well	64%	66%	77%	64%	51%	65%
Living a healthy lifestyle	64%	71%	82%	60%	50%	57%
Eating healthily	63%	76%	81%	57%	42%	63%
Preventative health (preventing disease and illness)	60%	67%	81%	54%	37%	61%
Education	59%	59%	80%	52%	45%	62%
Medical treatment	58%	73%	80%	49%	31%	61%
Living independently as I age	58%	68%	81%	54%	29%	58%
Saving time	58%	57%	77%	54%	40%	61%
Medical diagnosis	57%	65%	79%	49%	34%	62%
Being able to de-stress	54%	55%	75%	48%	40%	55%
Being an active part of my local community	54%	55%	74%	45%	40%	58%
Workplace efficiency	53%	54%	70%	53%	36%	55%
Saving money	51%	52%	74%	45%	31%	56%
Protecting the environment	50%	52%	73%	48%	28%	51%

**SUMMARY TABLE
BOTTOM 2 BOX - NOT SATISFIED**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
Protecting the environment	25%	14%	11%	31%	43%	23%
Saving money	22%	15%	10%	23%	39%	23%
Medical treatment	21%	5%	6%	30%	43%	17%
Medical diagnosis	19%	8%	6%	25%	38%	16%
Education	18%	8%	8%	24%	30%	18%
Preventative health (preventing disease and illness)	17%	6%	6%	20%	37%	15%
Being able to de-stress	17%	12%	8%	22%	25%	17%
Eating healthily	17%	5%	5%	24%	34%	15%
Workplace efficiency	16%	9%	8%	19%	25%	20%
Feeling safe where I live	15%	5%	4%	20%	34%	11%
Living independently as I age	15%	6%	4%	18%	31%	14%
Saving time	15%	9%	7%	15%	27%	16%
Sleeping well	15%	11%	9%	17%	21%	14%
Living a healthy lifestyle	14%	6%	4%	19%	23%	17%
Looking after the health of my family	13%	5%	5%	14%	27%	14%
Being an active part of my local community	13%	7%	6%	15%	19%	17%
Staying fit and active	12%	9%	5%	15%	17%	16%
My home being comfortable to live in	11%	7%	3%	19%	15%	12%
Being happy	11%	8%	3%	14%	19%	11%
Entertainment	11%	5%	5%	11%	19%	14%
Looking my best	9%	7%	4%	11%	13%	12%
Personal relationships	9%	5%	5%	11%	15%	10%
Access to information	8%	4%	4%	12%	10%	8%
Communication with my family and friends	7%	5%	2%	10%	9%	9%

6. What type of invention (or technology) would improve your life personally the most?

[Open End Question]

SUMMARY						
	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
HEALTH RELATED: Medical technology/ Health/ Health technology/medical cures/medical treatment, better healthcare (hospitals, doctors, nurses etc.), diet, exercise, healthy living	13%	15%	11%	12%	13%	12%
COMMUNICATION: Better cell phones/ smart phones / tablets, etc., communication technology/ devices, landline communication	9%	3%	6%	12%	4%	20%
Better computers/ Computer/ Information technology	9%	5%	6%	17%	2%	14%
Electronics/Household Appliances, consumer electronics (e.g. TVs, cameras)	8%	2%	2%	10%	19%	7%
SUSTAINABILITY: Cheaper/environmentally friendly alternative/solar energy sources, energy efficient cars, emission control (cars), environmental conservation (pollution, wildlife, fuel)	8%	4%	9%	8%	12%	5%
Internet	7%	3%	2%	12%	1%	15%
Other	11%	8%	11%	12%	11%	12%
Satisfied with current state	1%	1%	2%	*%	4%	*%
No/None/Nothing	4%	4%	8%	2%	4%	5%
Don't know/refused	27%	46%	31%	13%	23%	24%

VERBATIMS

<p>The Netherlands</p>	<p>"A drug that eliminates cancer fully out of this world."</p> <p>"A drug that makes my husband better:"</p> <p>"A device that would permit you to detect certain illnesses yourself at home."</p> <p>"Probably better medical treatments. If they invented something like a cure for cancer and different disease."</p> <p>"Home computer that supports you in your role as housewife ! Keeps an agenda, makes payments, etc."</p> <p>"Understand each other better; as such, an improvement in communication."</p> <p>"Replace all what has to do with fuel and/or fuel-related products with naturally degradable products, namely, CO2, cars, or standard sun panels. None or little industrial exhaust/discharge."</p>
<p>USA</p>	<p>"A machine that automatically separates recycles from non-recyclables to help the environment"</p> <p>"Probably better medical treatments. If they invented something like a cure for cancer and different diseases."</p> <p>"Fuel efficient big cars."</p> <p>"Actually, lower lighting costs, production of actual physical lighting like LED lights and such"</p> <p>"Having a computerized home."</p> <p>"Something that could unify all the different multimedia products, to your smart products. not needing 5 different devices to do different thing."</p> <p>"If i can scan something that can tell me if there's toxins and bad stuff. So i could not give it to my kid if it flashes red and if it flashes green to give it to my kid."</p>
<p>China</p>	<p>"I think it's improvement in medical treatment. What we wish mostly is that we can cure incurable diseases, which can improve our life the most."</p> <p>"Technologies about health and environment improvement."</p> <p>"Internet connection through Computers, applications, remote medical services, mobile communications and other high-techs."</p> <p>"The birth of the Internet has changed the path of human development."</p> <p>"Computer, by which we can better communicate with our relatives and friends, and retrieve various information conveniently."</p> <p>"Mobile phone. The existing mobile phones have small memory and can hardly use Wifi. Unless used in areas covered by network, otherwise they would waste network flow."</p>

VERBATIMS

<p>Russia</p>	<p>"Invention for a cancer treatment."</p> <p>"Affordable medical devices for human health."</p> <p>"A device for curing all diseases."</p> <p>"A floor washer that washes floors without human intervention, a dishwasher; which loads and places clean dishes into cabinets, self-cleaning bathroom fixtures, ironing machine, which also does everything (irons and puts clothes in the closet), a home money-printing machine; a cooking machine (it would be great if it could buy food too)."</p> <p>"If in the near future they invent a device that would diagnose basic parameters of human activity and not cost very much, I will definitely buy it. The monitoring of my body will allow me to see doctors less, to regulate my medications, and to lead a healthy lifestyle. I believe if people had such opportunity, it would significantly increase their life expectancy."</p> <p>"Inventions that would not harm the environment, alternative energy sources and devices that would absorb into themselves (like a vacuum cleaner), all waste, emissions and processed it."</p> <p>"A much more sophisticated and tight control of food safety, medicine, and environmental protection."</p>
<p>Kingdom of Saudi Arabia</p>	<p>"A drug that eliminates cancer fully out of this world."</p> <p>"A drug that makes my husband better!"</p> <p>"A device that would permit you to detect certain illnesses yourself at home."</p> <p>"Probably better medical treatments. If they invented something like a cure for cancer and different disease."</p> <p>"Home computer that supports you in your role as housewife ! Keeps an agenda, makes payments, etc."</p> <p>"Understand each other better; as such, an improvement in communication."</p> <p>"Replace all what has to do with fuel and/or fuel-related products with naturally degradable products, namely, CO2, cars, or standard sun panels. None or little industrial exhaust/discharge."</p>

7. What type of invention (or technology) would improve the lives of people you care about most?

[Open End Question]

SUMMARY						
	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
HEALTH RELATED: Any/All types of medical cures/Medical treatment, Medical technology/ Health/Health technology, better healthcare (i.e. diagnoses, hospitals, doctors/nurses, etc.), Diet/ Exercise/ Healthy Living	22%	20%	26%	29%	15%	18%
COMMUNICATION: Better cell phones/ smart phones / tablets, etc., Communication/ Communication technology/ devices, Telephone/Landline communication	9%	3%	4%	13%	8%	18%
Electronics/Household Appliances, consumer electronics (e.g. TVs, cameras)	8%	1%	*%	8%	24%	4%
SUSTAINABILITY: Cheaper/environmentally friendly alternative/solar energy sources, Cars (i.e. energy efficient, better emission control, etc.), environmental Conservation (i.e. pollution, wildlife, fuel	6%	2%	5%	6%	10%	4%
Better computers/ Computer/ Information technology	6%	2%	3%	9%	5%	10%
Internet	5%	2%	2%	8%	4%	10%
Other	8%	7%	6%	9%	10%	9%
Satisfied with current state	*%	*%	1%	*%	1%	*%
No/None/Nothing	3%	3%	6%	3%	1%	3%
Don't know/refused	31%	53%	36%	13%	29%	28%

VERBATIMS

The Netherlands	<p>"New medical treatments for conditions associated with aging, to prolong life and physical/mental health."</p> <p>"Anti-cancer drug"</p> <p>"A device that keeps you healthy and fit."</p> <p>"Online old age care so that people can continue living at home and feel safe and cared for when they get older."</p> <p>"Something that improves communication among people. Better listening, be considerate to each other; have time for each other."</p> <p>"A technology that signals and warns when something is going wrong."</p> <p>"Equipment and devices that do not consume much."</p>
USA	<p>"Something that will help keep their health in check. Something that will decrease cholesterol, diabetes, high blood pressure and something that will cure cancer."</p> <p>"Care for incurable disease, cure for mental and physical disabilities."</p> <p>"A reliable safe transportation system that got you to your destination safely in a timely manner; other than public transportation"</p> <p>"Communication. Improving cellular phones because families move apart. I think the fact that phones and computers are becoming more the same, your phone goes online, and has all these apps, that's going in the right direction."</p> <p>"Something that can save the planet."</p> <p>"Some kind of scanning device to better show the condition of the individual!"</p>
China	<p>"Improve the level of medical treatment and increase health protection."</p> <p>"Massage chairs, so I can let my elders relax when I don't have time."</p> <p>"Inventions in medical treatment can change the lives of people I care about."</p> <p>"Medicines that make people healthy and let them enjoy a long life."</p> <p>"It may be scientific research about disease prevention, which could help people I care about test their bodies by themselves."</p> <p>"The invention of Cell phones makes it possible to get in touch with others at any time."</p> <p>"1. Completely replace oil, coal, natural gas, nuclear energy; 2. Effective treatment and usage of all categories of garbage."</p> <p>"Intelligent family monitoring system."</p>
Russia	<p>"Serious diagnostic tools (systems) that can be used at home."</p> <p>"Accessible devices for treatment and health maintenance."</p> <p>"Biological replacement of all sick organs."</p> <p>"Reasonably priced and high quality medical equipment for maintenance and treatment of many human diseases."</p> <p>"There is practically no Internet in 100 km from Moscow. Innovations in this field will significantly improve life."</p> <p>"Environmentally friendly cars available to all people."</p> <p>"A technology that would improve the climate in the apartment and water quality."</p>
Saudi Arabia	<p>"A medical breakthrough which could heal all sickness."</p> <p>"Any technology that keep them healthy."</p> <p>"Invention of a product that will prevent occurrence fatal diseases like heart attack and cancer."</p> <p>"The same as the invention or technology that I wanted. One that we can use through our communications, so that we can see each other constantly and frequently through our mobile phones."</p> <p>"Energy Savings Equipment.. same as Solar powered and free from gasoline or diesel."</p> <p>"That which helps to save time and money and reduce tension."</p>

Demographics

D1. A few last questions that will be used for classification purposes only. Including yourself, how many people are there in your household?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	5235	1029	1001	1126	1081	1000
1	11%	22%	22%	2%	10%	3%
2	24%	34%	33%	15%	30%	9%
3-4	41%	33%	29%	62%	48%	31%
5-6	16%	9%	10%	19%	11%	31%
7 or more	7%	1%	4%	3%	1%	26%
Refused	1%	1%	2%	*%	*%	*%
MEAN	3.47	2.68	2.78	3.55	3.04	5.32

D2. How many children under age 18 are in your household?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	4596	790	762	1104	970	970
None	48%	63%	60%	43%	47%	33%
1	29%	17%	17%	52%	35%	17%
NET: 2 OR MORE	23%	21%	23%	5%	18%	50%
2	14%	15%	13%	4%	14%	23%
3	5%	4%	6%	*%	3%	14%
4	2%	1%	2%	*%	*%	7%
5 or more	2%	1%	1%	1%	*%	7%

D3. How many children are in the following age groups?

THOSE WITH A CHILD: # Less than 5 years old						
	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	2395	296	306	627	514	652
0	57%	69%	63%	66%	51%	45%
1	33%	19%	24%	31%	43%	36%
2	9%	12%	11%	2%	5%	15%
3	1%	*%	3%	1%	*%	2%
5	*%	-	-	-	*%	1%

THOSE WITH A CHILD: # 5-10 years old						
	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	2395	296	306	627	514	652
0	61%	63%	52%	68%	65%	54%
1	30%	26%	37%	31%	31%	25%
2	8%	10%	10%	1%	3%	16%
3	1%	1%	1%	-	*%	4%
4	*%	-	-	*%	-	1%
9	*%	-	-	1%	-	-

THOSE WITH A CHILD: # 11-12 years old						
	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	2395	296	306	627	514	652
0	79%	79%	79%	83%	85%	70%
1	19%	19%	17%	16%	14%	25%
2	2%	2%	4%	*%	1%	4%
7	*%	-	-	1%	-	-

**THOSE WITH A CHILD:
13-17 years old**

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	2395	296	306	627	514	652
0	63%	51%	59%	74%	72%	52%
1	29%	39%	32%	25%	26%	29%
2	8%	10%	7%	1%	2%	17%
3	*%	*%	-	1%	*%	1%
4	*%	-	1%	-	-	*%
5	*%	-	1%	*%	*%	-

D4_USA. What is the highest level of education you have completed?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1001	-	1001	-	-	-
NET: LOWER THAN BACHELOR DEGREE	74%	-	74%	-	-	-
8th grade or less	3%	-	3%	-	-	-
Some high school [9- 11]	11%	-	11%	-	-	-
High school diploma [GED]	29%	-	29%	-	-	-
Some college [A.A. degree]	31%	-	31%	-	-	-
NET: BACHELORS OR HIGHER	26%	-	26%	-	-	-
Bachelor's degree [B.A., B.S.]	15%	-	15%	-	-	-
Some post-graduate work	2%	-	2%	-	-	-
Post-graduate degree [M.S., M.A. Ph.D, Ed.D., M.B.A., M.D., J.D., D.O., D.D.S.,etc]	9%	-	9%	-	-	-
Prefer not to answer	1%	-	1%	-	-	-

D4_NETH. What is the highest level of education you have completed?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1029	1029	-	-	-	-
NET: LOWER THAN BACHELOR DEGREE	68%	68%	-	-	-	-
primary	3%	3%	-	-	-	-
vmbo, mbo1, avo onderbouw	11%	11%	-	-	-	-
avo onderbouw	3%	3%	-	-	-	-
havo/vwo, mbo	15%	15%	-	-	-	-
mbo2 en mbo3	11%	11%	-	-	-	-
mbo4	13%	13%	-	-	-	-
havo, vwo	12%	12%	-	-	-	-
NET: BACHELORS OR HIGHER	29%	29%	-	-	-	-
BA/BS	19%	19%	-	-	-	-
MA/PHD	9%	9%	-	-	-	-
Prefer not to answer	3%	3%	-	-	-	-

D4_CHINA. What is the highest level of education you have completed?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1126	-	-	1126	-	-
NET: LOWER THAN BACHELOR DEGREE	37%	-	-	37%	-	-
Primary school or below	2%	-	-	2%	-	-
[F1-F3] Junior secondary school/middle school/ junior high school	3%	-	-	3%	-	-
[F4-F5] Senior secondary school/senior high school	9%	-	-	9%	-	-
Technical/vocational training beyond senior high school	23%	-	-	23%	-	-
NET: BACHELORS OR HIGHER	62%	-	-	62%	-	-
University/Polytechnic	54%	-	-	54%	-	-
Post graduate or above	8%	-	-	8%	-	-
Prefer not to answer	1%	-	-	1%	-	-

D4_RUSS. What is the highest level of school that you have completed?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1081	-	-	-	1081	-
NET: LOWER THAN BACHELOR DEGREE	32%	-	-	-	32%	-
Elementary	*%	-	-	-	*%	-
Intermediate	1%	-	-	-	1%	-
Graduated high school	5%	-	-	-	5%	-
Vocational/trade/ technical school	15%	-	-	-	15%	-
1 to 3 years university	10%	-	-	-	10%	-
NET: BACHELORS OR HIGHER	65%	-	-	-	65%	-
4 years university	7%	-	-	-	7%	-
5 or more years university	53%	-	-	-	53%	-
MBA or Doctorate	5%	-	-	-	5%	-
Prefer not to answer	3%	-	-	-	3%	-

D4_SA. What is the highest level of education you have completed?

	Total	The Netherlands	USA	China	Russia	KSA
TOTAL ANSWERING	1000	-	-	-	-	1000
NET: BACHELORS OR HIGHER	60%	-	-	-	-	60%
PhD	3%	-	-	-	-	3%
MBA or Business- Related Degree	8%	-	-	-	-	8%
Other Masters Degree	8%	-	-	-	-	8%
Undergraduate Degree	41%	-	-	-	-	41%
NET: LOWER THAN BACHELOR DEGREE	34%	-	-	-	-	34%
Diploma/Certifications	22%	-	-	-	-	22%
Secondary School / Others	9%	-	-	-	-	9%
Primary School	3%	-	-	-	-	3%
Can read but no formal education	*%	-	-	-	-	*%
Prefer not to answer	6%	-	-	-	-	6%

