HORIZON

WHAT DECIDES AN APPLIANCE PURCHASE

Reliability wins. Smart ranks near the bottom.

Across independent studies from 2024 to 2026, most of them fielded in the US, appliance buyers consistently rank reliability and value far above connected features. This briefing reads that pattern from an R&D lens: what the gap costs, where it does not apply, and how to close it before tooling is committed.

Findings are primarily from US consumer samples. See methodology, page 07.



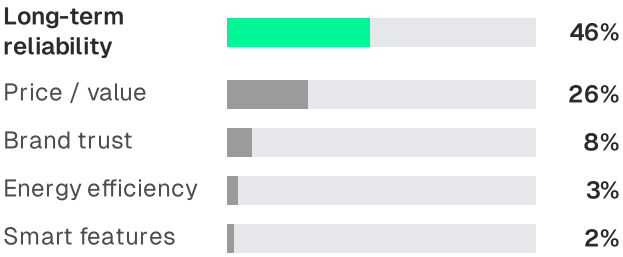
Two sources, one direction. Reliability leads; connected features trail.

Asked to name the single most important reason they choose an appliance, 2,676 respondents put **long-term reliability at 46% and price/value at 26%**. That is nearly three of four decisions. **Smart features came in at 2%**, level with design and behind brand trust, ease of use, energy efficiency and warranty. McKinsey reports the same direction in white goods: consumers in Europe, Japan and the US rank durability, efficiency and affordability above advanced or connected features. Curion is a US sample; McKinsey is multi-regional. See page 07.

EVIDENCE · TWO SOURCES, ONE DIRECTION

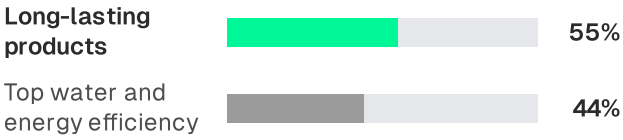
Two different questions, the same direction.

PRIMARY PURCHASE DRIVER



Curion 2026 · n=2,676 · one answer only · selected answer options. Design also 2%.

WOULD PAY A 30–40% PREMIUM FOR



McKinsey Global State of White Goods Survey 2024 · n=9,050 · Europe, Japan, US

The same survey: consumers rank **durability, efficiency and affordability** above advanced or connected features.

Sources: Curion 2026; McKinsey 2025. Two different questions, placed side by side and never combined.

WHAT IT MEANS FOR R&D

Feature spend that moves neither reliability nor price/value buys a differentiator buyers do not rank, in either source.

Connected appliances show higher problem rates.

J.D. Power measured problems per 100 units across connected and non-connected appliances. **Connected units show a materially higher problem rate**, and reliability is what closes the sale. Some of that gap reflects added components and software; some reflects that connected units are also newer, pricier and more feature-dense, so this is an association rather than proof that connectivity alone causes failures. Deloitte finds the fatigue underneath: connected devices per home fell from 25 in 2021 to 21 in 2023, 41% dislike managing them and nearly six in ten worry about security breaches.

THE RELIABILITY GAP, IN THREE READINGS

READING 01 · BASELINE

63 /100

Non-connected appliances set the bar.

63 problems per 100 units over the first three years of ownership.

READING 02 · CONNECTED

87 /100

24 more problems per 100 units.

More components and software mean more potential failure points, in a product sold on lasting a decade.

READING 03 · IN USE

92 /100

The more the features are used, the higher the rate.

Owners who actively use the connected features report the highest problem rate of the three readings.

Source: J.D. Power 2025 U.S. Appliance Reliability & Service Study · problems per 100 units, first three years of ownership (US). Deloitte 2023 Connectivity and Mobile Trends Survey (US).

WHAT IT MEANS FOR R&D

One problem cuts repurchase intent by twenty points.

32% of owners intend to buy the brand again once they have hit a problem, down from **52% before**. Most of that cost lands in the next purchase rather than in the service budget.

Younger buyers don't pull toward smart either.

The assumption that younger buyers will pull the category toward connected features finds no support in Curion's open-ended responses. Both generations arrive at **reliability and trust**, by different roads. Neither asks for more connectivity.

CONSUMERS 50+

Product-first

Trust is built through performance: substance, plain communication and a product that delivers on its promise.

Reliability | Value | Warranty | Ease of use | Longevity

CONSUMERS UNDER 50

Relationship-first

They scrutinise messaging and brand behaviour before evaluating the product, and want a real person speaking to them.

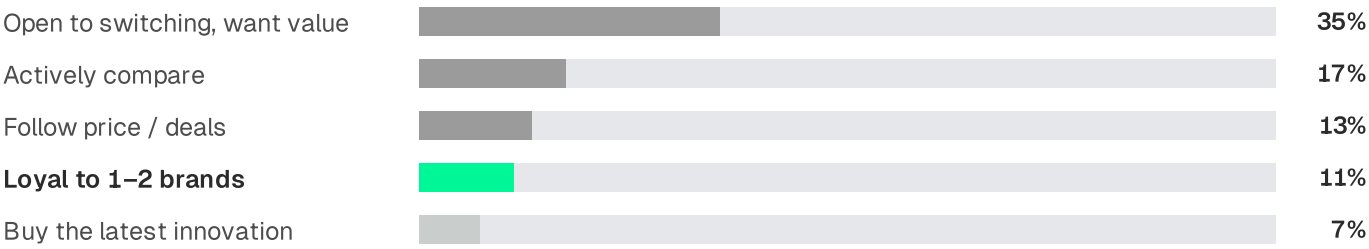
Authenticity | Transparency | Human interaction | Brand values

Source: Curion 2026, open-ended responses (n=2,676).

FINDING 04 · THE OPENING

A loyalty vacuum is a switching opportunity.

Only **11% are loyal** to one or two brands; **35% are ready to switch now** and say nobody has earned them; just 7% are moved by the latest innovation. McKinsey shows the window widening: the share holding appliances 10+ years rose from 35% to 39% in a single year.



Source: Curion 2026, n=2,676 · each bar is a separate share of respondents, not a breakdown of 100%. Categories are not mutually exclusive and the remainder gave other answers.

WHAT IT MEANS FOR R&D

Nine in ten buyers are unattached and a third are shopping now. The switching decision is being made on reliability and value, the two attributes a feature roadmap can strengthen or erode.

The features that do a real job still sell.

The evidence argues for relevance, not against innovation. NIQ finds energy efficiency still the leading purchase driver for major appliances, since **more than 90% of an appliance's lifetime energy is spent in use**. In the same study 74% of consumers prefer health and wellness features, and Gen X pays a premium for durability. J.D. Power's 2026 satisfaction study finds overall satisfaction rising, driven largely by better durability.

DOES NOT, ON ITS OWN

- Connectivity without a stated support period (Consumer Reports)
- Features that add failure points (J.D. Power 2025)

Adds cost, not conversion.

EARNS A PURCHASE

- Reliability and durability (J.D. Power 2026)
- Energy efficiency (NIQ)
- Health and wellness, 74% (NIQ)

Earns the premium.

Sources: NIQ Home Appliances Outlook 2026; J.D. Power 2025 and 2026; Consumer Reports 2024.

THE DIVIDING LINE

A feature wins when it does a real job better than what people already own. The mandate is **the right features, proven before tooling**.

A NOTE ON STRATEGY

Connected features also serve goals beyond the purchase moment: servitization and recurring revenue, predictive maintenance, energy-grid participation and regulatory compliance. This briefing evaluates connectivity as a consumer purchase driver, not those strategic cases. Both can be true at once.

Everything to this point is third-party evidence. What follows is Horizon's interpretation.

The gap isn't a data problem. It's a timing problem.

The sources point the same way: the feature roadmap and the buyer are misaligned. The cause is sequence, not a shortage of data. **The decisive data arrives after the expensive commitments**, once a concept has won programme budget and tooling and platform decisions are underway, inside a 12–24-month cycle in which reversing course is the costliest move on the board.

The question can be answered earlier, behaviourally, without asking people to predict themselves. Put a realistic offer in front of buyers in their familiar online environment, measure purchase intent, and let the evidence set the gate. For an R&D organisation that reorders one thing only: **which evidence is allowed to consume tooling capital, and at which gate**.

THE SEQUENCE · THREE GATES BEFORE TOOLING

01	**Frame the bet**	What need does the feature fill, and is that need worth replacing what is already in the home?
02	**Measure purchase intent**	A realistic offer page, measured on behaviour before tooling rather than on stated preference.
03	**Commit on evidence**	Go or no-go on measured demand, not on opinion, seniority or internal conviction.

THE READ

The brands that win the next chapter of this category will not be the ones with the smartest appliances. They will be the ones buyers feel most confident bringing through the door, and that confidence is **measurable before tooling**. This validates the demand, concept and price decision before tooling, not the long-run reliability experience, which stays an engineering and quality discipline.

NEXT STEP

Walk one of your roadmap bets through the three gates before it consumes tooling capital. Talk it through with us: **gethorizon.net**

Three layers of evidence.

This briefing combines primary consumer research on appliance purchase behaviour and brand loyalty; independent industry measurement of connected-product reliability, satisfaction and category demand from J.D. Power, NIQ, Deloitte, McKinsey and Consumer Reports; and Horizon's own reading of what that evidence implies for product and tooling decisions. All figures are drawn from the third-party sources listed below; refer to the originals for full methodology and definitions.

ANCHOR STUDY · CURION 2026 (PAGES 02–05)

Curion Poll PULSE survey of 2,676 respondents with open-ended responses, published June 2026. Press coverage also cites a larger Curion poll of 5,610; those figures are not used here because Curion has not published them. Different studies measure different questions. Single-choice primary driver, willingness to pay a premium and problems per 100 units are reported separately and never combined into one figure.

SCOPE & LIMITATIONS

Most sources (Curion, J.D. Power, Deloitte, Consumer Reports) are US consumer samples; McKinsey and NIQ are global or multi-regional. The pattern is strongest in mature Western markets and should not be generalised to China and other Asian markets, where connected-appliance demand is materially higher.

SOURCES

- Curion Insights, *The Great Appliance Paradox* (June 2026). Poll PULSE, n=2,676
- J.D. Power, *2025 U.S. Appliance Reliability & Service Study*. Problems per 100 units, first three years
- J.D. Power, *2026 U.S. Appliance Satisfaction Study*. Satisfaction 705 (+6), durability +8
- McKinsey & Company, *What's trending in white goods: durable, efficient, and affordable* (2025). Global State of White Goods Survey 2024, n=9,050
- NIQ, *Home Appliances Outlook 2026* (October 2025). Energy, health and wellness, durability premium
- Deloitte, *Connectivity and Mobile Trends Survey* (2023). Device count, management burden, security concern
- Consumer Reports, *When Will Your Smart Appliance Turn Dumb?* (2024). Software-support periods of 21 brands

HORIZON

From features to evidence.

The most effective appliance innovators will not ask whether a feature sounds right. They will ask whether buyers act on it, before tooling is committed.

ABOUT HORIZON

Horizon supports innovation, product, and consumer-insight teams in validating strategic product decisions before launch through behavioural pretotyping. By measuring purchase intent close to a real buying situation, Horizon enables companies to reduce launch risk, accelerate time-to-market, and avoid costly misinvestments.

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