Living with Technology post-COVID

How tech sentiment, adoption, and the digital lifestyle have shifted and continue to evolve

A report preview from GfK Consumer Life

GfK An NIQ Company

About this report preview

- It’s been a few years of industry-changing momentum, opportunities, and challenges for the world of technology. The sudden acceleration of the digital lifestyle during COVID lockdowns sent the sales of electronics and adoption of streaming services soaring. Then purchases slowed as consumers re-entered the "real" world and prioritized experiences over possessions. And the introduction of ChatGPT last fall was met with both record-speed adoption and deep concerns.
- **Living with Technology** explores how consumer tech sentiment, usage, and adoption have shifted and continue to evolve amid major disruptions.

Interested in the full Living with Technology report? Contact GfK for more information.

Tech through and post-COVID:

A few years of major momentums, opportunities, and challenges

2020

Lockdowns drove consumers online for work and play

70%
of global consumers age 15+ who work or study from home at least weekly

2021

Stay@home continued to drive household tech spending

↑27%

The global IT retail market recorded nearly $63.9 billion in the first half of 2021 (excluding North America), +27% YOY

2022

Market saturation and dampened consumer sentiment amid blistering inflation drive down electronic spending

Challenging times for the global consumer electronics market

Decreasing demand drives increasing promotion activities

2023

Generative AI draws strong interest and heightened concerns

ChatGPT **sets record** for fastest-growing user base

65%
The skills that are needed for roles across the globe are estimated to change by at least 65% by 2030, driven by rapid developments in AI that will accelerate workplace change

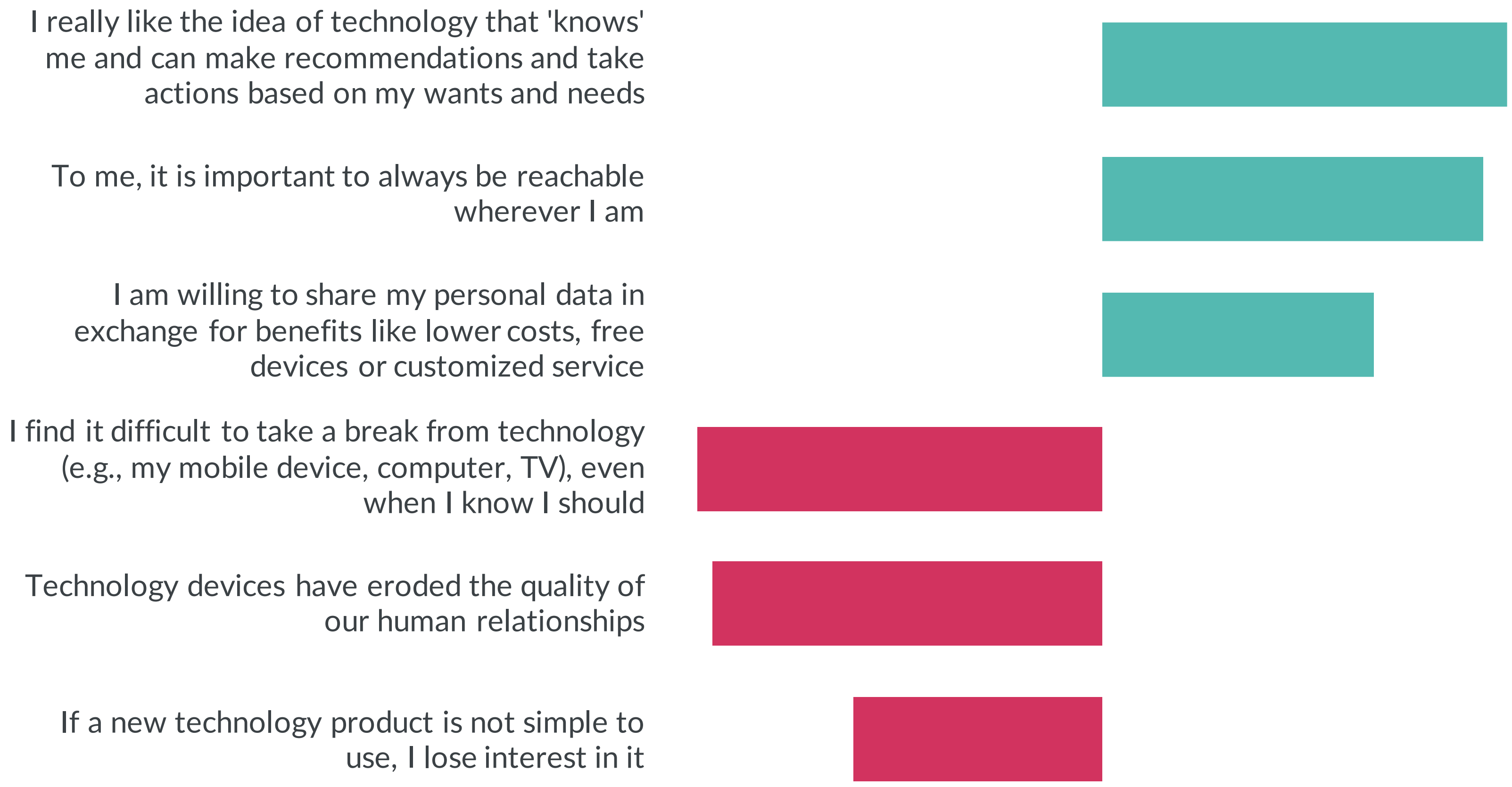
27%
of jobs at high risk from AI revolution, says OECD

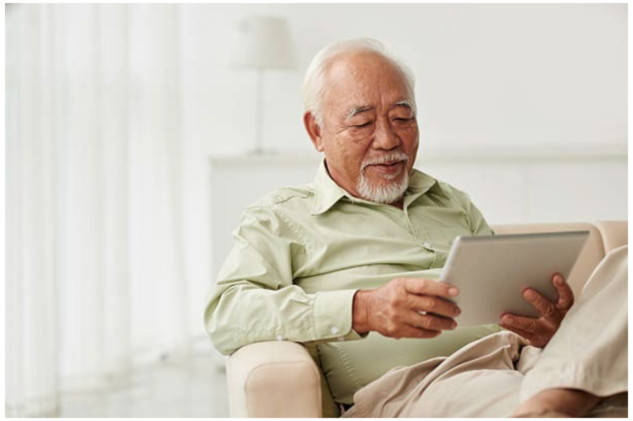
GfK Tech & Digital Lifestyle 2020 study, TD_45 (global = core 18 countries), GfK 2020 webinar - "The COVID Curveball; Ongoing pandemic leads to further growth of global IT market in the first half of 2021 (gfk.com); Challenging times for the global consumer electronics market (gfk.com); Promotion season 2022 – Decreasing demand drives increasing promotion activities (gfk.com); Finding the path toward success as organizations bring AI into the workplace | ZDNET; https://www.reuters.com/technology/27-jobs-high-risk-ai-revolution-says-oecd-2023-07-11/

People hold mixed views on technology

They understand that it is not all good or bad

Global consumers who agree with statements:





Older ≠ Anti-Tech

Older people tend to be less enthusiastic about technology. But they are not necessarily more negative about it.

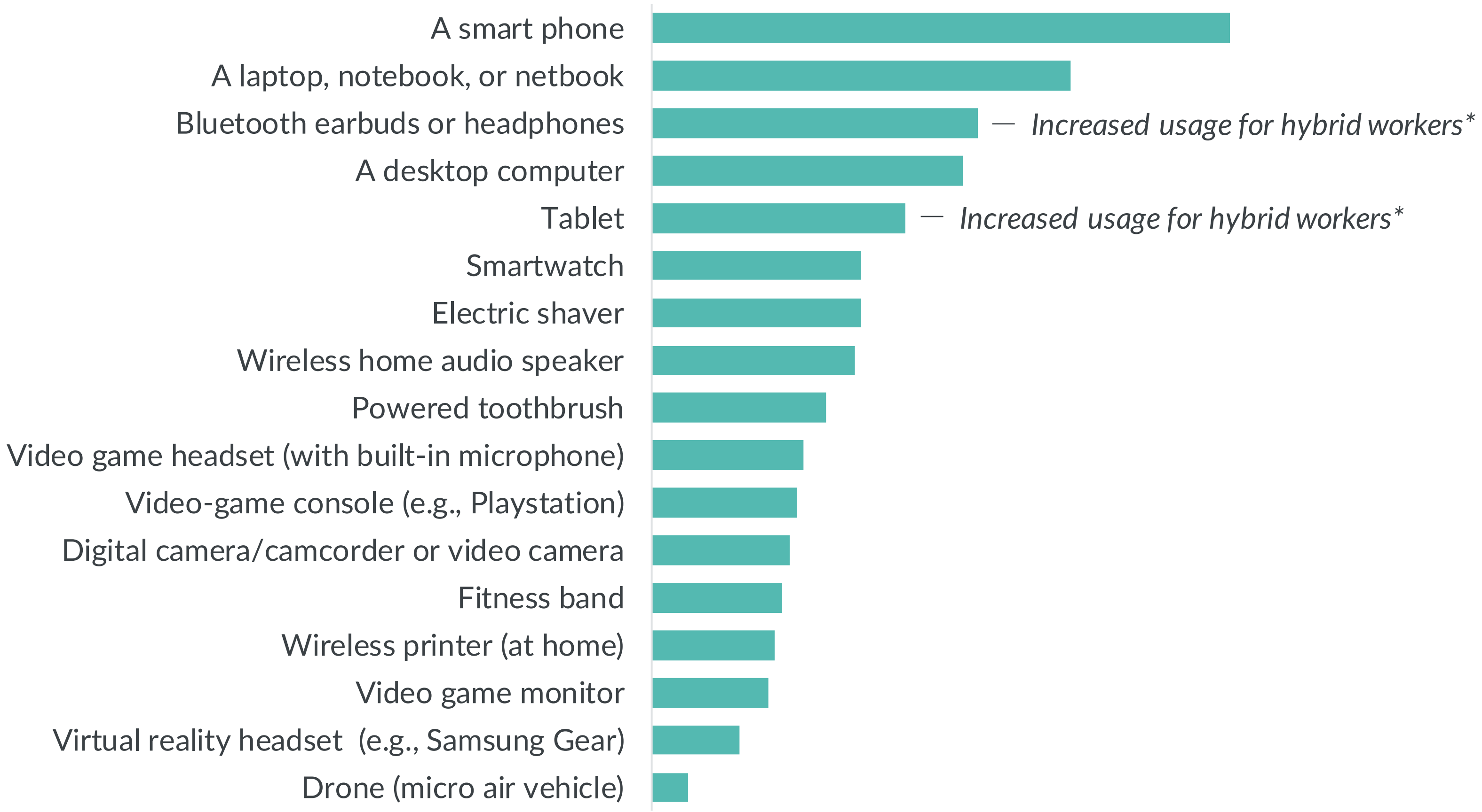
In fact, Boomers are notably *less* likely than younger generations to find it difficult to take tech breaks and no more likely to lose interest in complex products.

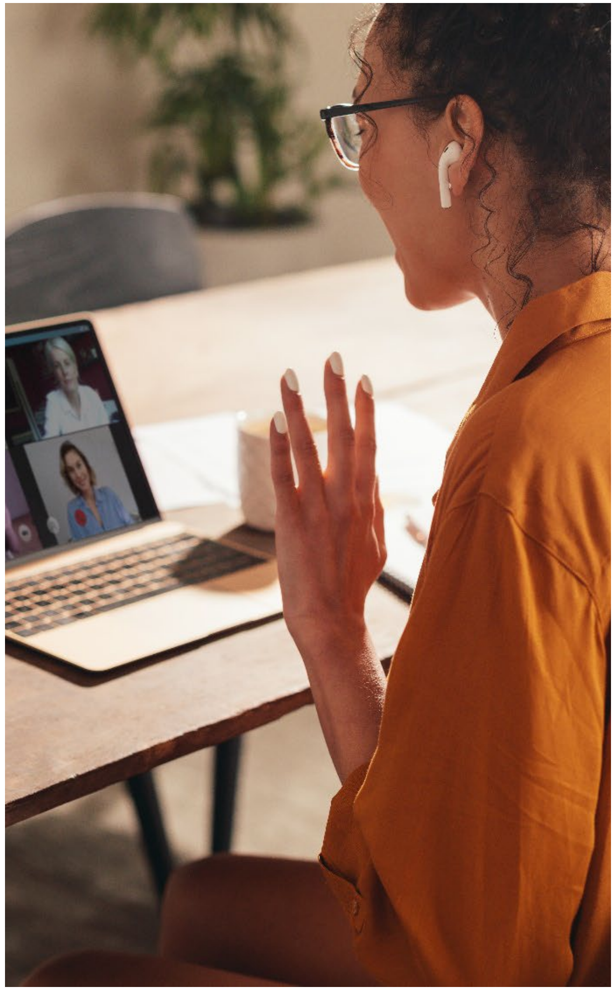
GfK Consumer Life Global 2023, O2, TDA1-2 (global = 18 countries

8 in 10 worldwide use smartphones

Hybrid workers use the most devices in general and may be the best market for tech

Top used devices in the past 30 days



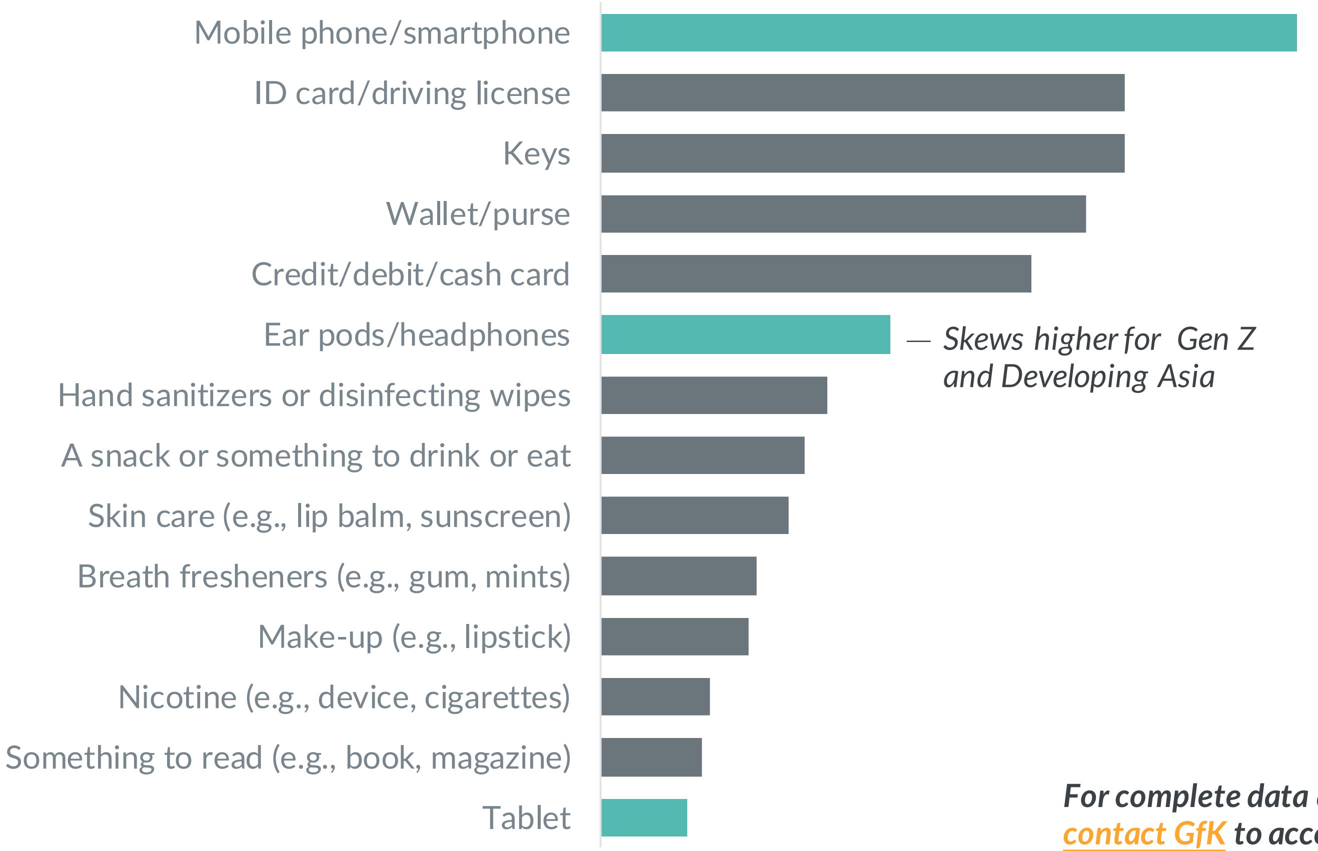


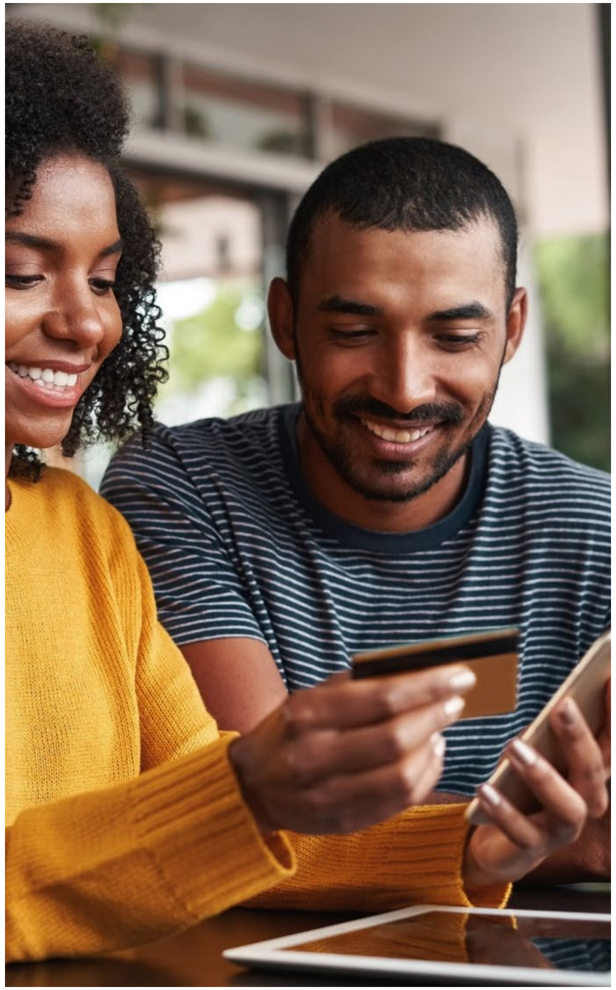
GfK Consumer Life Global 2023, Q4 (global = 18 countries); *employed people who work from home some of the time; ** based on list of 17 items; comparisons made based on 21 gender, generation, workplace, presence/age of children, education, and income segments

Mobile wallets are making physical ones obsolete

Smartphones are the #1 item people take with them, ahead of ID, keys, and money

Top items consumers take with them when leaving home



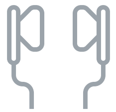


For complete data around the digital lifestyle, contact GfK to access the complete report.

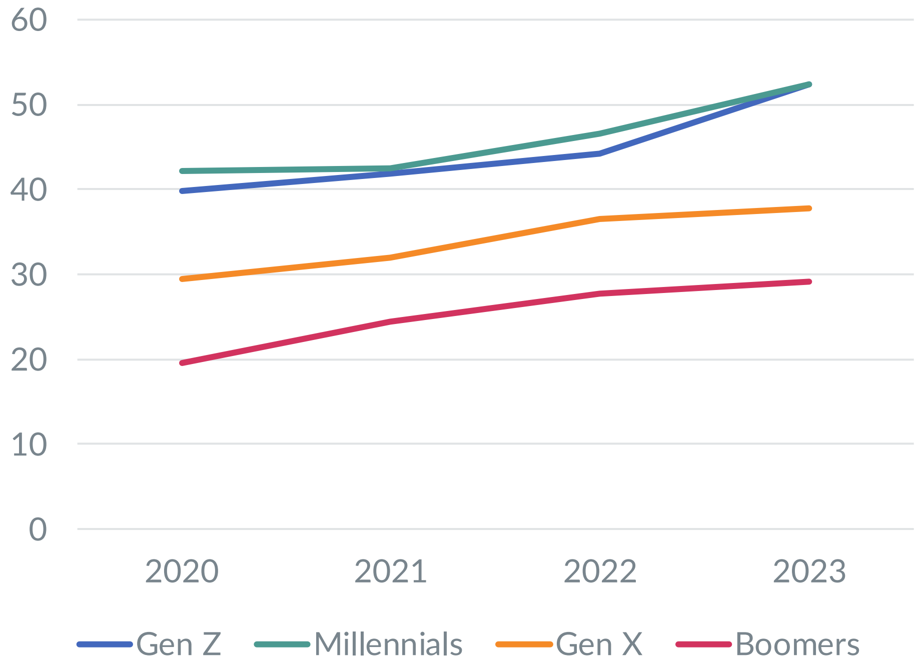
GfK Consumer Life Global 2023, B39, O7a (global = 18 countries); *employed people who work at home some of the time; comparisons made based on 21 gender, generation, workplace, presence/age of children, education, and income segments

Wireless headphones/earbuds: Rapid mainstreaming

Notable growth is seen across generations and markets



% of global consumers who used by generation



Blurred lines between hearing aids and earbuds may help drive the adoption of hearables among older consumers.

The US Food and Drug Administration (FDA) approved sales of over-the-counter hearing aids last August, making it easier for electronic companies to enter the market. Big-name players including Sony, Jabra, Bose, and Sennheiser all jumped in with products of their own.

Which tech devices are poised to go mainstream?
Contact GfK to access the complete report.

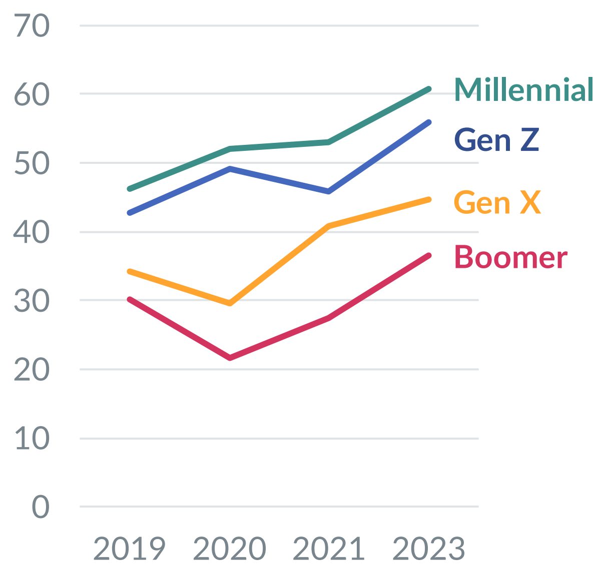
GfK Consumer Life Global 2020-2023, O4 (global = core 18 countries, GfK Consumer Life 2021, B1 (global = core 18 countries)
https://www.digitaltrends.com/home-theater/ces-2023-new-sennheiser-wireless-earbuds-will-help-you-hear-better-in-noisy-places/
https://www.digitaltrends.com/home-theater/sennheiser-otc-hearing-aids-all-day-clear/

Global trends around the digital lifestyle

Social media shopping is poised to grow

"Shopping on social media networks is fun"

52% agree,
↑12 pts from 2019



Virtually everyone uses apps

97% of global consumers have used at least one app in the past month, including 94% of Boomers

Most gaming is done on phones

76% of global consumers play video/electronic games at least weekly*

Streaming has become a way of life for many

22% of global consumers have "needed to **cut back on spending in other areas** to pay for my subscription services such as video/music/gaming streaming services"

But there are challenges with streaming, too…

"The proliferation of streaming platforms and paywalled games have made it much more challenging for [sports] fans to track their favorite teams.

60% of fans responded that they have trouble finding games that are 'essential' for them to watch."

GfK Consumer Life Global 2022, TD32 (global = 14 countries) *net of 5 devices; 2023, B42 (global = 18 countries)

Most intended products vary somewhat by region

Latin Americans most enthusiastic about smart home gadgets

Overall, Latin American intenders are the most likely to be first-time buyers new to the category, whereas Western Europeans are the most inclined to be existing users looking to replace their products.

Planning to purchase the following (top three by region)*

	North America	Latin America	Western Europe	Developed Asia	Developing Asia
1	Smart alarm/security cameras	Smart alarm/security cameras	Smart lighting/bulbs	Smart appliances	Smart alarm/security cameras
2	Smart doorbells/locks	Smart lighting/bulbs	Smart thermostat	Robotic vacuum cleaners	Smart doorbells/locks
3	Smart lighting/bulbs	Smart appliances	Smart appliances	Smart TV	Smart appliances

For data and a full product ranking by region, contact GfK to access the complete report.

GfK Consumer Life Global 2023, TD29 (regional data based on data collected in core 14 countries), *rank based on percentages with two decimal points

What's next for consumers and tech?

Sustainability and resource conservation a focal point for consumers and manufacturers

73% of global consumers **conserve energy** at home all or most of the time.

↑3 pts from 2022

71% of global consumers **conserve water** at home all or most of the time, ↑4 pts from 2022

AI-enabled products move from "smart" to "intelligent"

52% **of global consumers agree:**

"I really like the idea of technology that 'knows' me and can make recommendations and take actions based on my wants and needs"

GfK Consumer Life Global 2023, TDA (global = core 18 countries)

Thank you for reading:

Living with Technology post-COVID

This presentation provides a preview of the complete report that covers data and insights around how consumers are living with technology.

For the complete report, regional insights and data sets, contact GfK for more information.

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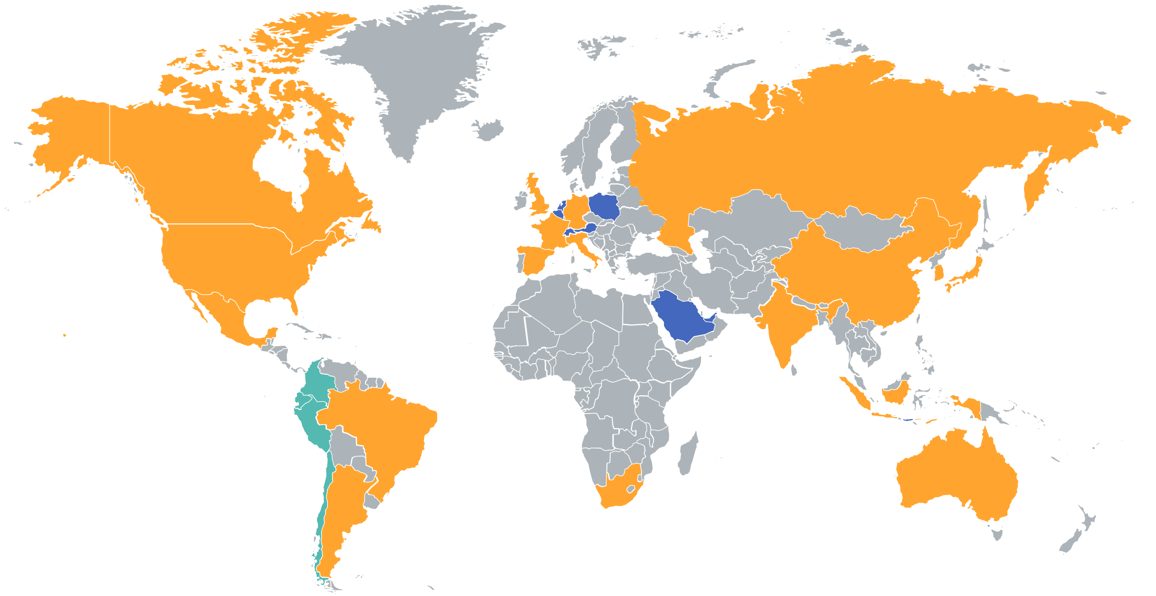
GfK Consumer Life Global study at-a-glance

Sample: Between 1000 and 2000 per market

The 18 markets highlighted in **gold** represent a consistent core country set available for trending; 7 in **blue** are additional syndicated markets

The 4 countries in **teal are additional markets that are not part of the syndicated dataset, but are available for purchase*

Argentina	Chile*	India	Netherlands	Spain
Australia	China	Indonesia	Peru*	Switzerland
Austria	Colombia*	Italy	Poland	UAE
Belgium	Ecuador*	Japan	Russia	UK
Brazil	France	KSA	South Africa	USA
Canada	Germany	Mexico	South Korea	



Fieldwork: January-May 2023

29 Markets

All Regions: Asia-Pacific, North America, South America, Western Europe, Central/Eastern Europe, and Middle East/Africa

Online

Panel blend of 4-6 online and mobile providers for each market

Learn more

Discover how Consumer Life enables marketing, innovation, and strategy leaders to create successful, fact-based plans for the future.