

KANTAR

Finding the Future series

TECH- ENABLED LIFE

GLOBAL REPORT



What awaits us in the world of consumer tech?

- 1.**
Introduction and framework
- 2.**
Consumer trends
- 3.**
The innovation angle
- 4.**
The sustainability narrative
- 5.**
Concluding thoughts



Click to navigate



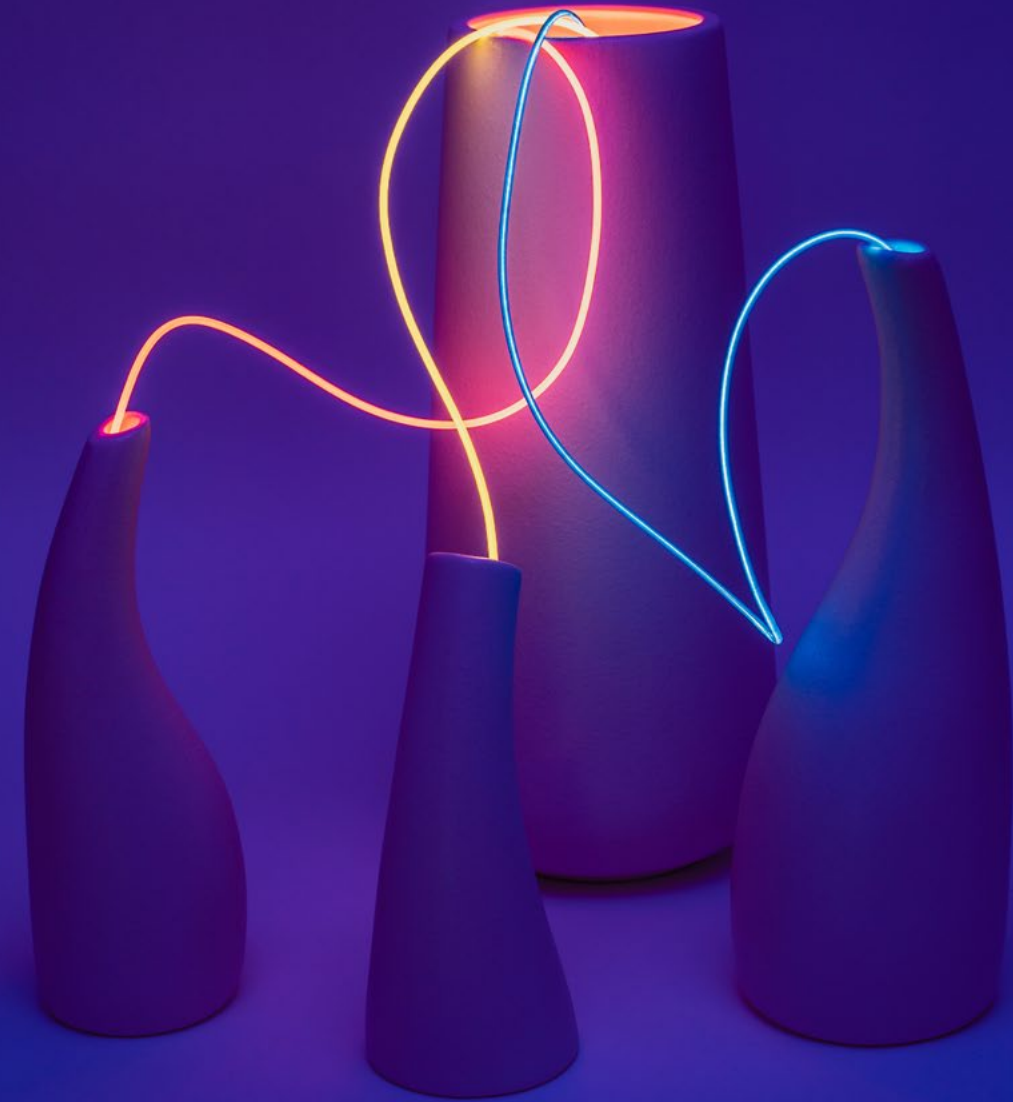
Intro

Welcome to Kantar's *Finding the Future series*, **your guide to the latest global trends**.

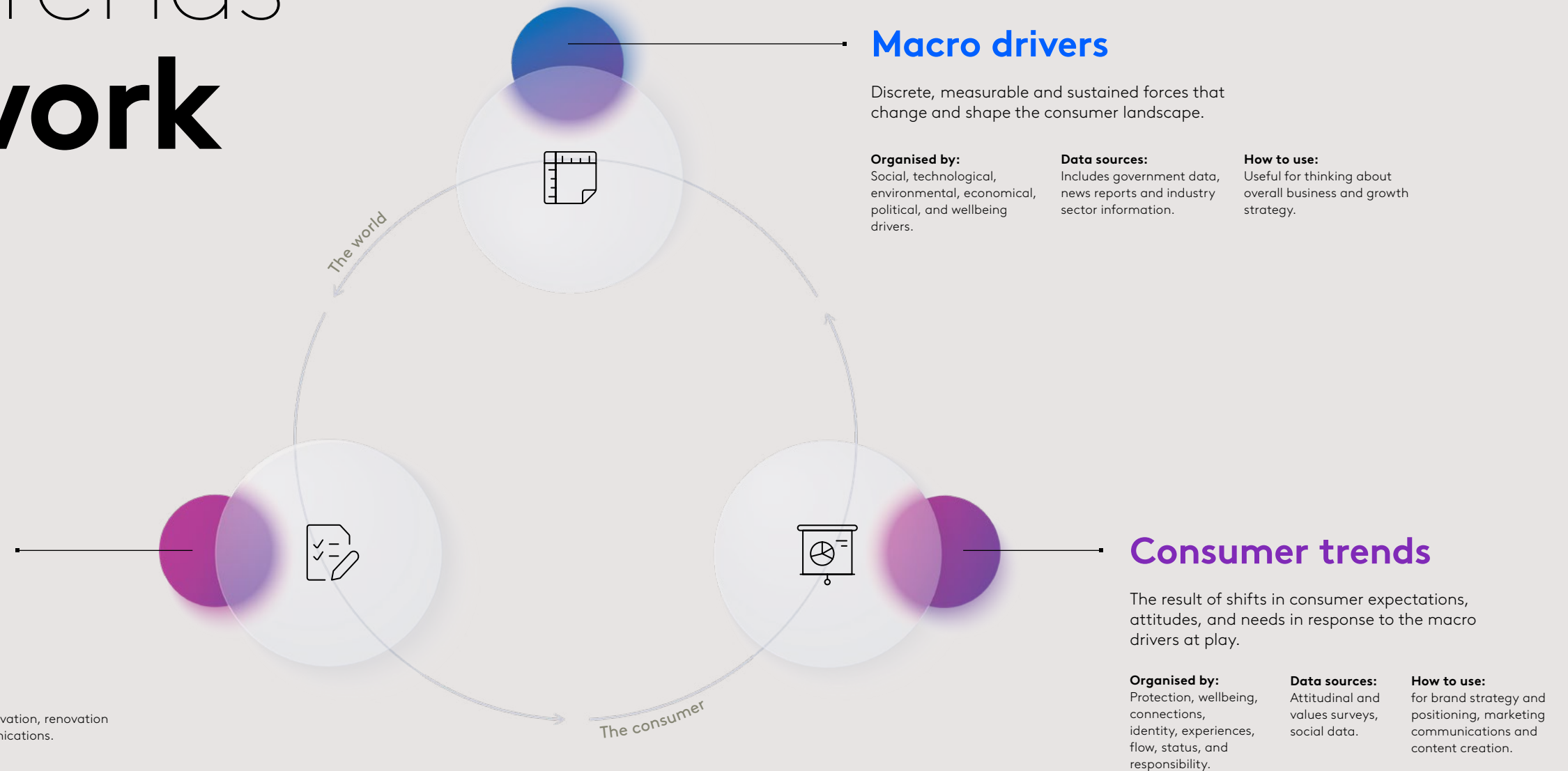
Powered by Kantar's Dx Analytics proprietary toolkit, we apply AI and analytics on big data (search and social) to identify emerging trends at speed and scale.

By layering human insight and Kantar's trends framework, we identify growth opportunities for brands across markets, languages, and categories in real-time.

In this issue, we showcase emerging trends linked to consumer technology (smart home, personal tech, gaming, communication), enabling brands to map and identify future innovation, growth, and activation opportunities.



Kantar trends framework



Macro drivers

Discrete, measurable and sustained forces that change and shape the consumer landscape.

Organised by:

Social, technological, environmental, economical, political, and wellbeing drivers.

Data sources:

Includes government data, news reports and industry sector information.

How to use:

Useful for thinking about overall business and growth strategy.

Category/Product expressions

Leading-edge manifestations of energy in any market. Includes types of products, benefits and ingredients.

Organised by:

New products, services, subcultures, messaging campaigns, etc.

Data sources:

Social and search, panel and industry data.

How to use:

Product innovation, renovation and communications.

Leverages Kantar's Dx Analytics proprietary tool powered by big data and AI

Consumer trends

The result of shifts in consumer expectations, attitudes, and needs in response to the macro drivers at play.

Organised by:

Protection, wellbeing, connections, identity, experiences, flow, status, and responsibility.

Data sources:

Attitudinal and values surveys, social data.

How to use:

for brand strategy and positioning, marketing communications and content creation.

Leverages Kantar's proprietary attitudinal database: Global MONITOR

How we did it?

We looked at over **35bn+ Google searches** linked to **190+ topics** spanning **8k+ trends globally** over a span of five years to uncover emerging trends.



2018-2023

Time period



2023

Predicted data



35 billion+

Data points

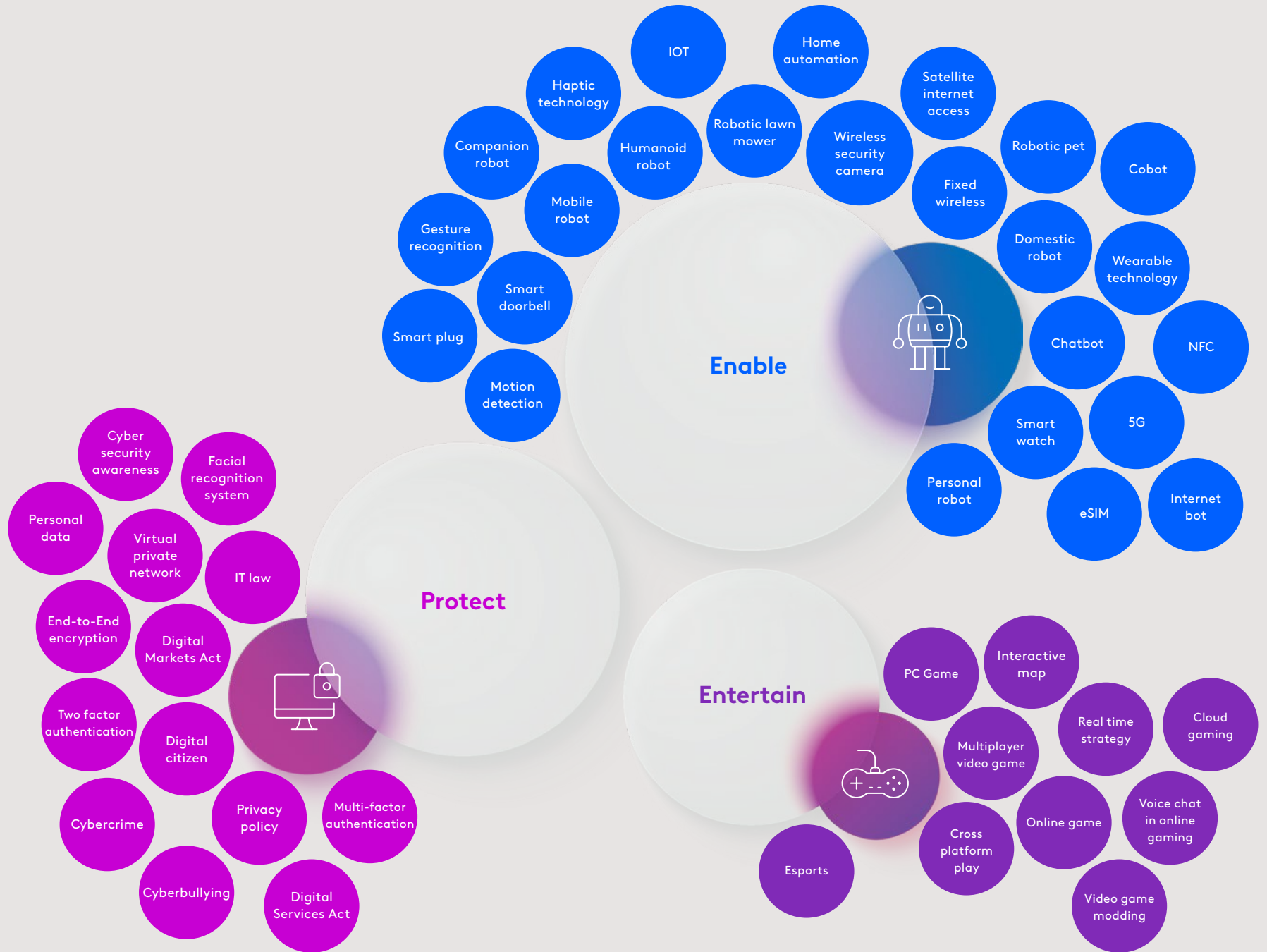


8,993

Number of search trends evaluated

The **three** key pillars driving the narrative on trends

What do consumers want?
How does the evolving context of search translate to trends?



Resulting in **six** consumer led tech trends

1.



Tech gets **conversational**

2.



Health **on me**

3.



Harmonising integration within the smart home

4.



Ushering in the era of **advanced connectivity**

5.



Privacy and **protection**

6.



Gaming redefined



Tech gets **conversational**

Speech advancements make tech more
human and commerce conversational

1

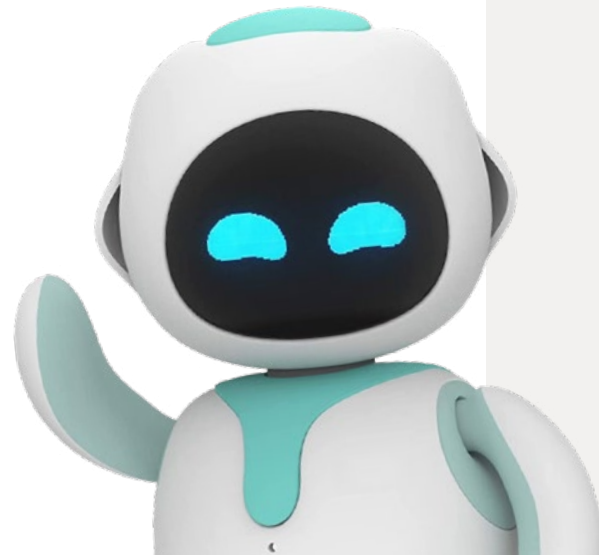
Trend definition



The rapid advancement within the robotics ecosystem is creating a growing need for **AI based social robots that are viewed as friends, mentors, soulmates** rather than machines designed to deliver specific functions.

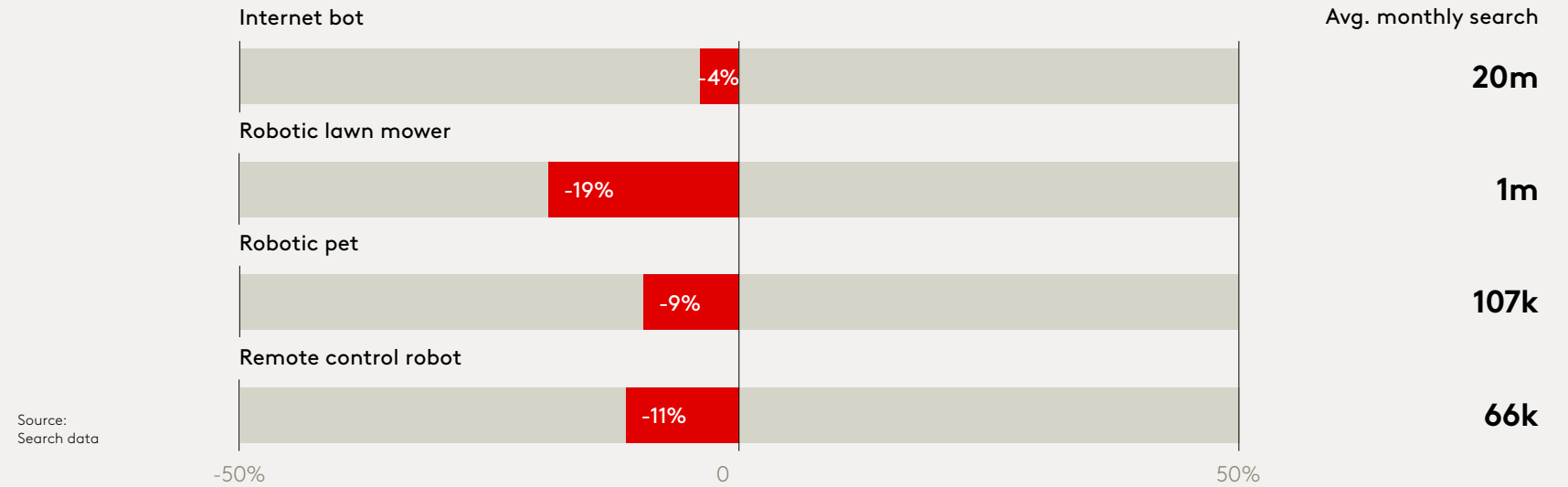
25m+

Average global monthly searches

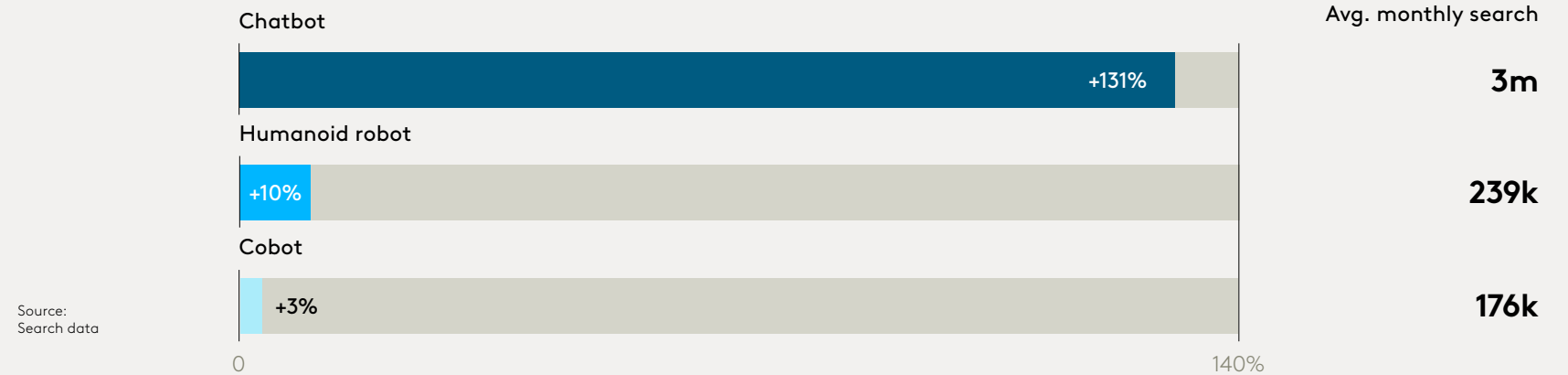


Consumer need: **Enable**

TOPICS THAT CONTINUE TO BE ON THE RADAR BUT ARE DECLINING YoY



TOPICS THAT ARE GAINING SIGNIFICANT TRACTION AND MOMENTUM



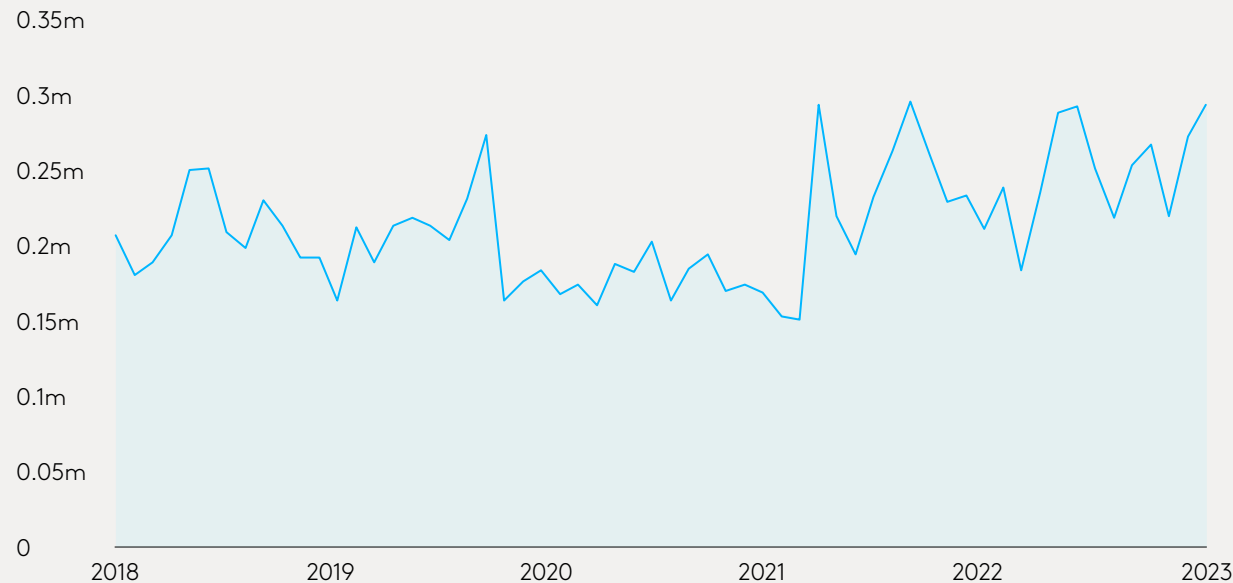
Consumer need

There is a growing acceptance of robotic companions as they make gradual inroads into the home. Consumers appear to be interested and are seeking information about robots enabled by technology from across the spectrum. Buddy, Aibo, Loona (ChatGPT) EMO, Ameca, and Sophia are examples of companion robots for children, adults, and older people.

Therefore what lies ahead?

Functionality moves to the next level as the demand and utility for socially assistive robots continue. As AI gets increasingly embedded, there is a need to take a step back and consider if ethical guidelines are in place. What kind of data integrity and security procedures are in place? Is there a mechanism that ensures the systems are regularly audited to ensure full compliance? The unfolding scenario, while fascinating, is unsettling and raises ethical, legal, and social issues.

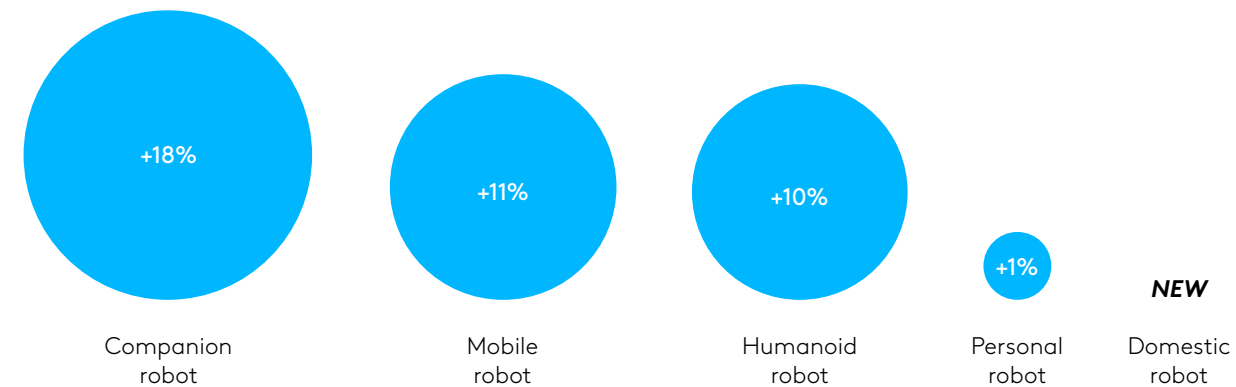
INTEREST IN HUMANOID ROBOT



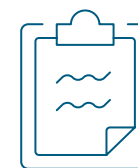
Source: Search data

DISRUPTIVE TOPICS RANKED BY GROWTH (YoY)

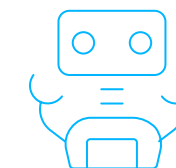
Source: Search data



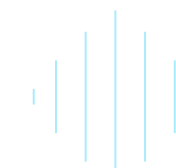
Core consumer needs linked to this trend.



Perform tasks



Entertain



Converse

How brands are already **innovating** to address this trend



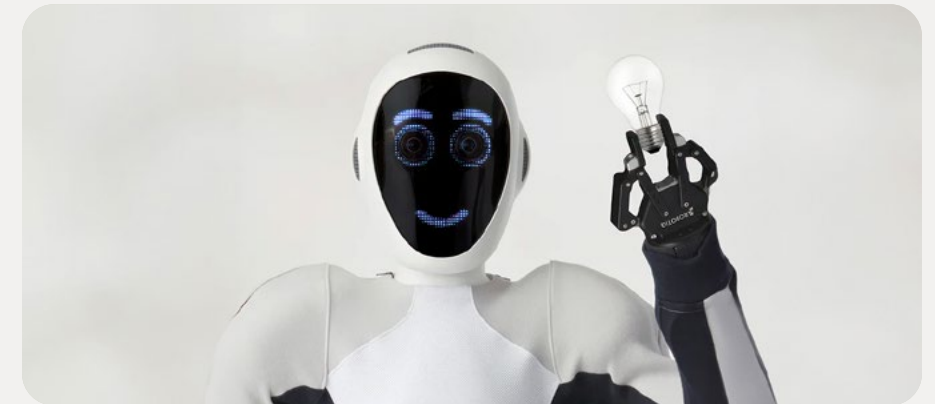
Q-bear: AI baby crying translator uses AI technology to analyse and recognise babies' needs from different types of cries to help parents react more easily. There are four identifiable needs: hunger, a dirty/wet diaper, sleepiness, and a need for comfort. Q-bear can also detect a baby's discomfort level for parents to understand their baby's health situation further ¹.



Starbucks Barista has been using chatbots (since 2016) to help consumers order their favorite drink or snack through voice commands or text messaging. The chatbot will tell you when your order will be ready and the total cost ⁵.



ElliQ: A robotic companion for the elderly helps the aging stay active, connected, and engaged. Built primarily to address loneliness and healthy aging issues by establishing a rapport with its owner. It uses cognitive AI to initiate interactions and build relationships. The purpose is to initiate connections that hit the right note, provide comfort, reduce stress, and motivate users ².



EVE embodies safety, balance, and intelligence, making her the epitome of a smart and efficient android in the workforce ⁴.

So, what's **next?**

Macro drivers that are accelerating this trend

- Increasingly time-poor lives
- Rise in single-adult households
- Delayed/No marriage or long-term partnering
- Urban migration and lack of community, network, and support
- Increasing demand for hyper-personalisation, automation, and outsourcing of time and energy-intensive tasks
- Higher demand for inclusivity of neurodiversity in the workplace
- Aging populations
- Overstimulation from messaging overload

1

AI with empathy

AI has the potential to make the tools people use in modern life more friendly, and human-like, preserving some of the benefits of social contact and behaviour.

2

Greater inclusivity

Conversational AI not only brings everyone into the conversation, but it also helps to give more people more accessible access to skilled, team-based work, allowing them to easily converse with team members through brainstorming, think tanks, and more. Additionally, more people can find ways to converse with brands and services more intuitively.

3

Immersive and conversational

People will seek more immersive and conversational ways of absorbing content, from Conversational AI reading audiobooks to lectures to entertainment. The future of entertainment is both immersive and humanly responsive!

Health **on me**

Fuelling the age of hyper-personalisation

2



Trend definition

The need for personalisation continues to soar. Health and wellbeing are at the center as **consumers seek holistic medical grade wearables, technology and diagnostics as part of a healthy lifestyle.**

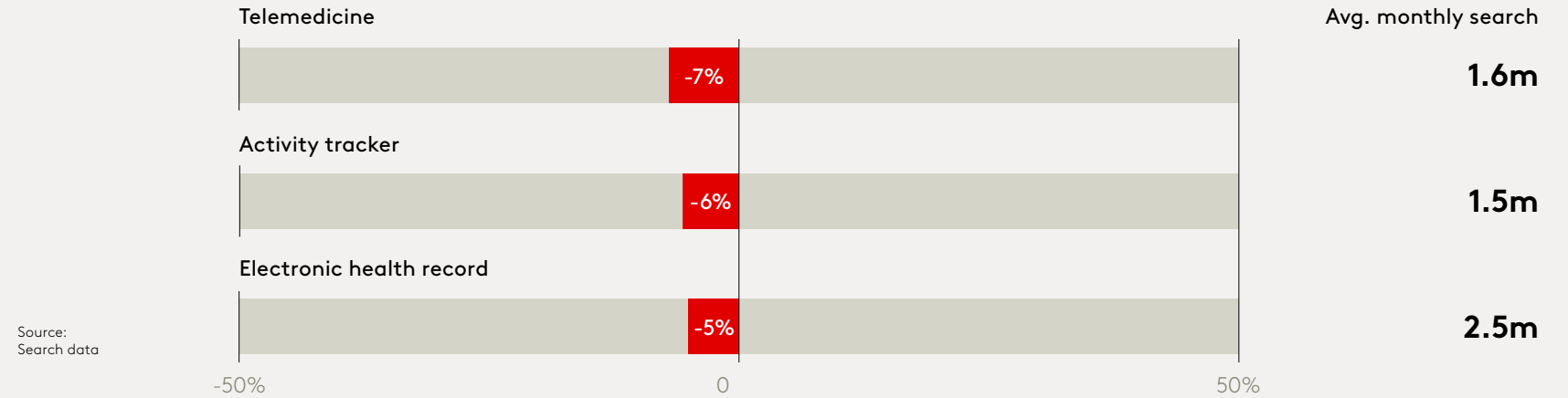
32m+

Average global monthly searches

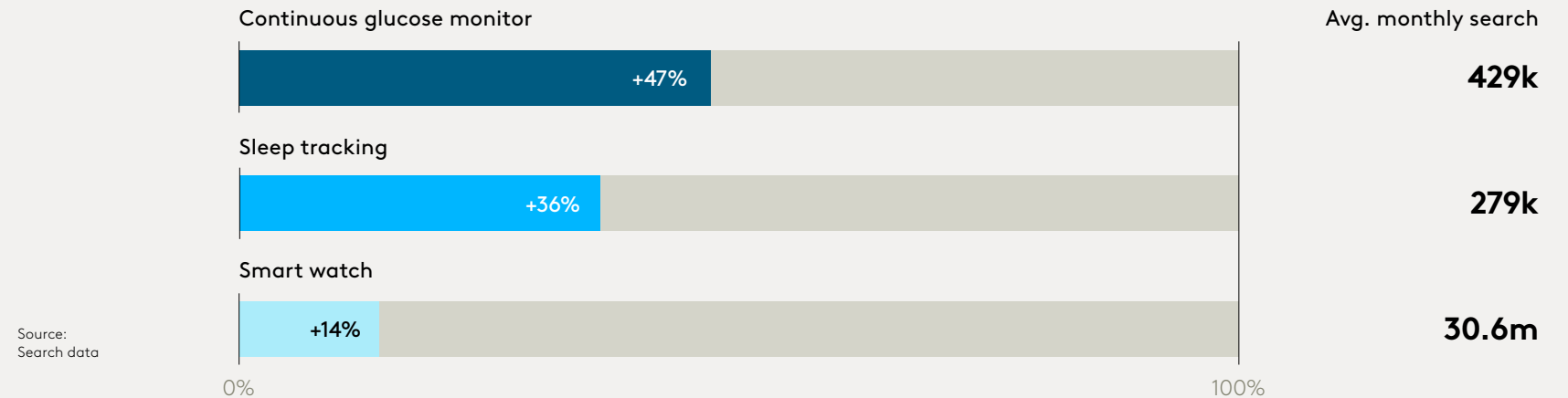
Consumer need: **Enable**



TOPICS THAT CONTINUE TO BE ON THE RADAR BUT ARE DECLINING (YoY)



TOPICS THAT ARE GAINING SIGNIFICANT TRACTION AND MOMENTUM



Consumer need

In line with their desire to exert greater control over their health and wellbeing goals, consumers continue to seek a holistic view of their health, thereby gravitating towards next-generation tech that enables devices to get insights on demand and on the go.

Therefore what lies ahead?

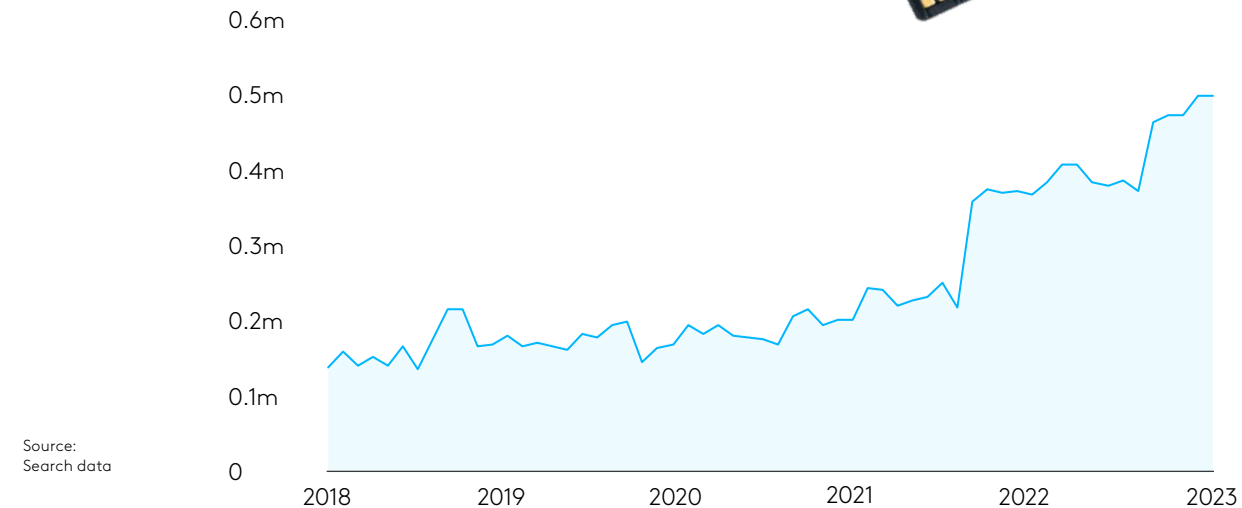
Data will continue to become a valuable commodity for businesses and consumers alike. The dependence on apps and wearables to augment and modify emotional and physical triggers will show no signs of abating. Brands will be expected to connect the dots and curate an offering that keeps the consumer's individual and personal needs and data in mind. Preventative moves to a new level, forecasting to enable overall wellbeing.

"Definitely a unique wearable – Great getting a look behind the curtains as far as my daily blood sugar goes. It helped me notice patterns and identify problematic foods and habits."

Social expressions



INTEREST IN CONTINUOUS GLUCOSE MONITORING

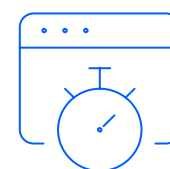


Source: Search data

Core consumer needs linked to this trend.



Continuous monitoring



Real time and accurate reading



Enhanced by sensors++



Diagnostic, integrated with other data points

How brands are already **innovating** to address this trend



Nutrisense offers a continuous glucose monitoring device that arms consumers with personalized real-time data correlating the response of glucose levels specific to food, exercise, stress, and sleep ⁵.



Movado introduces its smart ring, Evie, designed uniquely for women to track their menstrual cycle, mood, menopause, and beyond. They are positioned as a medical device challenging the status quo of similar offerings within the wearables space ⁶.



An AI-powered brain band by **Frenz** that uses 7-in-1 sensing technology to enhance sleep by continuously monitoring heart rate and brain activity ⁷.

So, what's **next?**

Macro drivers that are accelerating this trend

- Growing understanding of mental, physical health and the science behind
- Inequality in access to healthcare
- Increased risk of health threats – pandemics, drug resistant bacteria, NCDs (Noncommunicable diseases), and environmental risks
- Rise of alternative health influences e.g., Asian medicines, African botanicals, and other ancient or cultural philosophies
- Rise in access to DNA testing and in-home diagnostic tools

1

Personal health forecasting

Wellness tech becomes intuitive and easy to incorporate into our lives. Beyond diagnosis and tracking, it will enable in-moment advice, stripping out time and cost frictions of awaiting medical advice. Imagine the possibilities for an in-moment detailed understanding of even mild allergic reactions, digestive discomfort, or mental and emotional discomfort.

Beyond this, we will all have access to a harmonized ecosystem of our medical histories and tracking that provides our linked team of medical professionals with accurate information for future diagnoses, personal health forecasting, and monitoring.

2

In-moment and real time

Tech gives us in-moment tracking at our fingertips. Consider the rise of ingestible tech (capsule-sized micro-cameras that can illuminate and diagnose activities of our digestive systems). Tomorrow, we may know within hours if our vitamin supplements are being adequately absorbed or if our gut flora is out of balance, giving us more power to act in time.



Harmonising

integration within
the smart home

3



Trend definition

Looking for complete integration that **syncs home appliances in harmony with the Internet of Things**. Seamlessly and smoothly configured with an element of freedom (without a subscription) in one place.

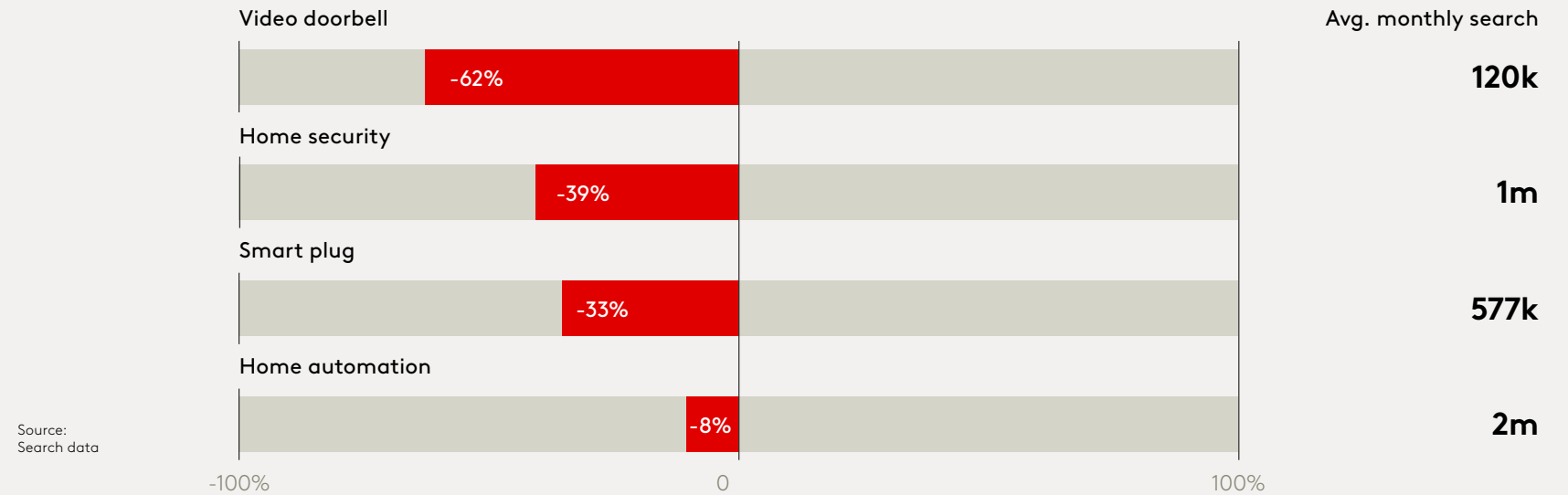
12m+

Average global monthly searches

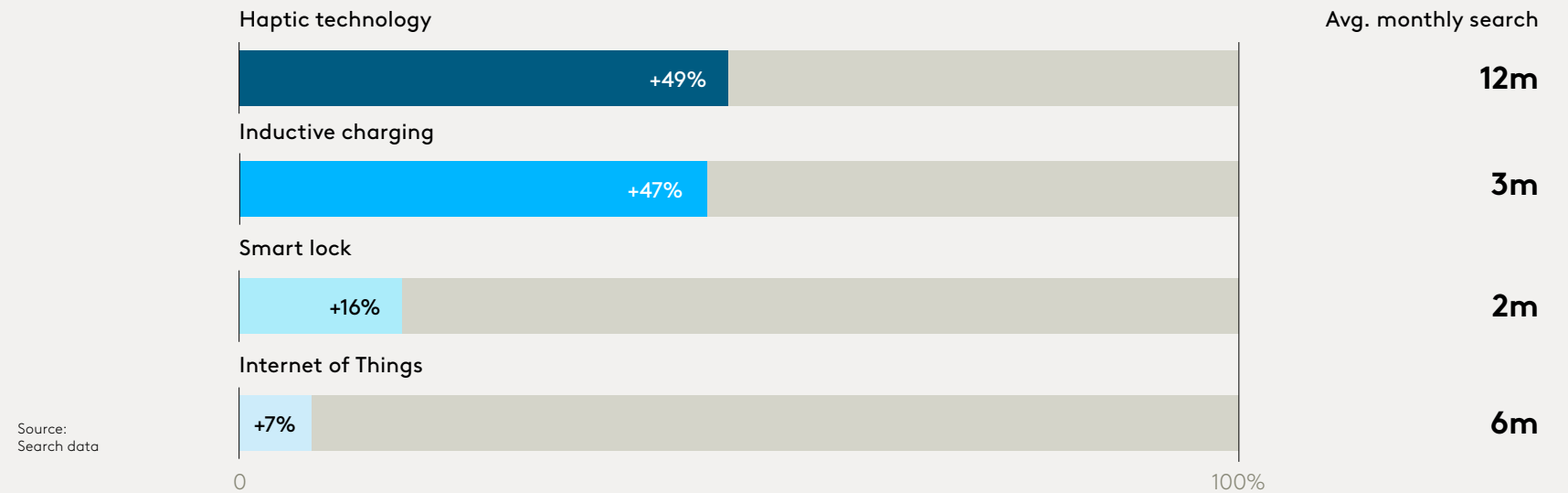
Consumer need: **Enable**



TOPICS THAT CONTINUE TO BE ON THE RADAR BUT ARE DECLINING (YoY)



TOPICS THAT ARE GAINING SIGNIFICANT TRACTION AND MOMENTUM



Consumer need

With technology getting embedded in practically every aspect of life, the expectation continues to grow that it would become more intuitive such that it can interpret and understand intentions. As consumers amass multiple smart devices across brands, there is a growing need to have it all connected and controlled from one space.

Therefore what lies ahead?

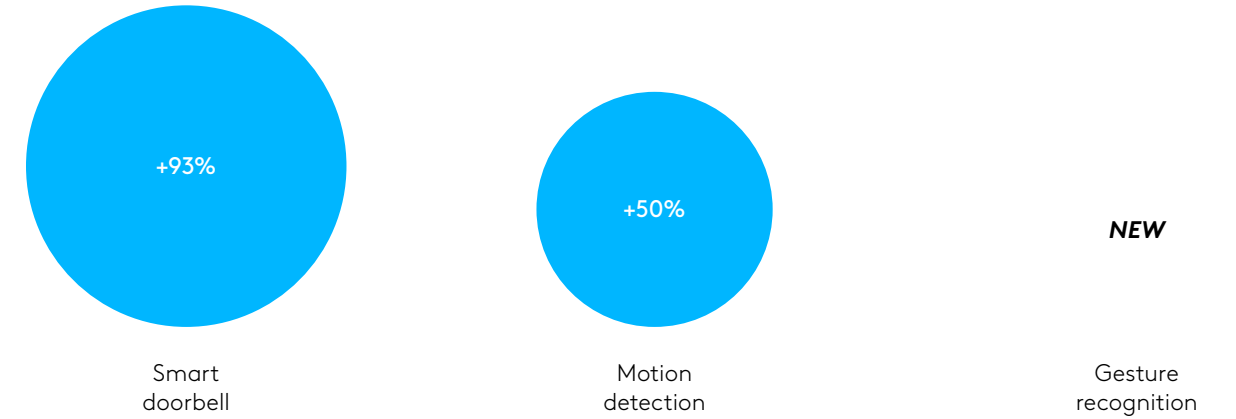
Smart home hubs from Alexa, Amazon, Bosch, and Google are top of mind as consumers try to unify their connected gadgets from a single app. The struggles of connecting devices that operate across multiple platforms are real, given the different connectivity protocols.

Matter is another new standard in smart home interoperability developed in collaboration with Apple, Amazon, Google, Samsung, LG, and more. It appears promising thanks to its ability to create unified connectivity for the smart home. The challenge is that the standard has been slow-moving with few available products, so smart branding, marketing, and product development are required to connect with consumer needs.

Considering this and the natural adoption curve has peaked, consumers may express some resistance or delay in acquiring smart home devices.

DISRUPTIVE TOPICS RANKED BY GROWTH (YoY)

Source: Search data

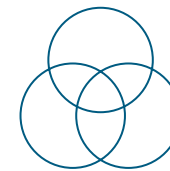


"It's not as easy as they make it out to be... while Apple has relaxed its requirements, the range of supported devices lags compared to some of the other players."

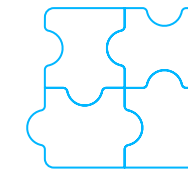
Social expressions



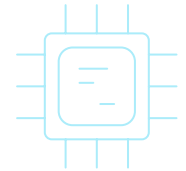
Core consumer needs linked to this trend.



Seamless



Integrated



High-tech

How brands are already **innovating** to address this trend



Osmo seamlessly integrates physical game pieces with digital games, allowing players to engage in various interactive activities such as drawing, coding, spelling, and more ⁸.



SynTouch (Haptic Data): What should your product feel like? How do you make it feel like that? SynTouch uses 'product feel' data to replicate the textures humans want to/prefer to feel. This is being used for nonwovens, cosmetics, automotive, paints, and even paper ⁹.

Home tech: Who is winning and what do consumers want?



Through Kantar's BrandDigital solution, we tracked five prominent brands – Amazon, Alexa, Google Home, Apple Homekit, ecobee, and Samsung's SmartThings - from June 2019 to May 2023 in the US market to understand which brands are driving consumer's attention in the tech-enabled home space.

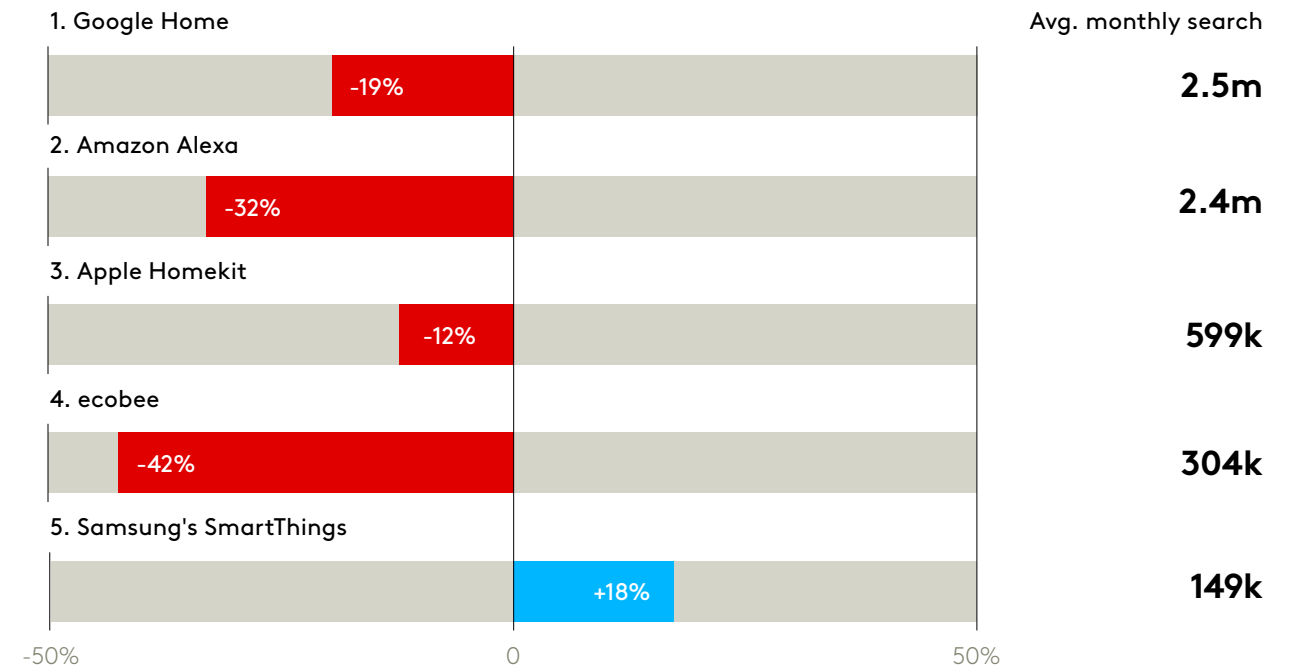
Our inquiry uncovered noteworthy findings: interest in smart home hubs has **consistently declined** over the last four years, **down 23%** versus 2022.

While Amazon and Google continue to dominate the market, **Samsung's 'SmartThings' emerges as a challenger brand, exhibiting a positive growth of +18%**. The data points to an interest in their latest offering, Station, which has experienced a growth rate of 4.5k% compared to the previous year.



Parnika Shrimali
Global Product Marketing Director, Brand Guidance
Kantar

TOP BRANDS RANKED BY SHARED OF SEARCH LAST YEAR (MAY '22 - APRIL '23)

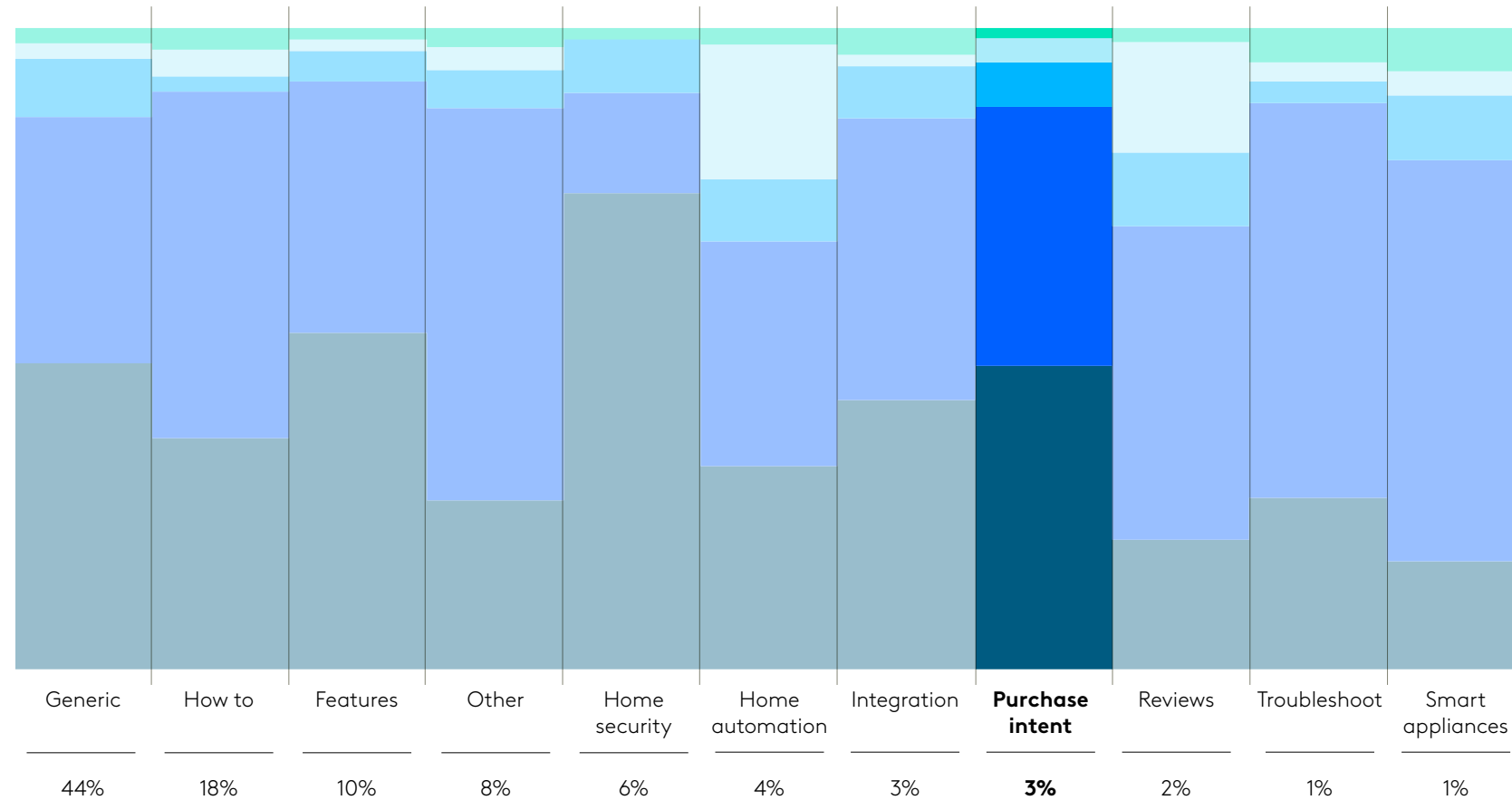


In the past year, **Samsung's SmartThings has successfully captured market share from its competitors**. In line with the overarching narrative, purchase intent is primarily fueled by Station.

Station from SmartThings enables consumers with a seamless solution to connect various smart products spanning various categories effortlessly.

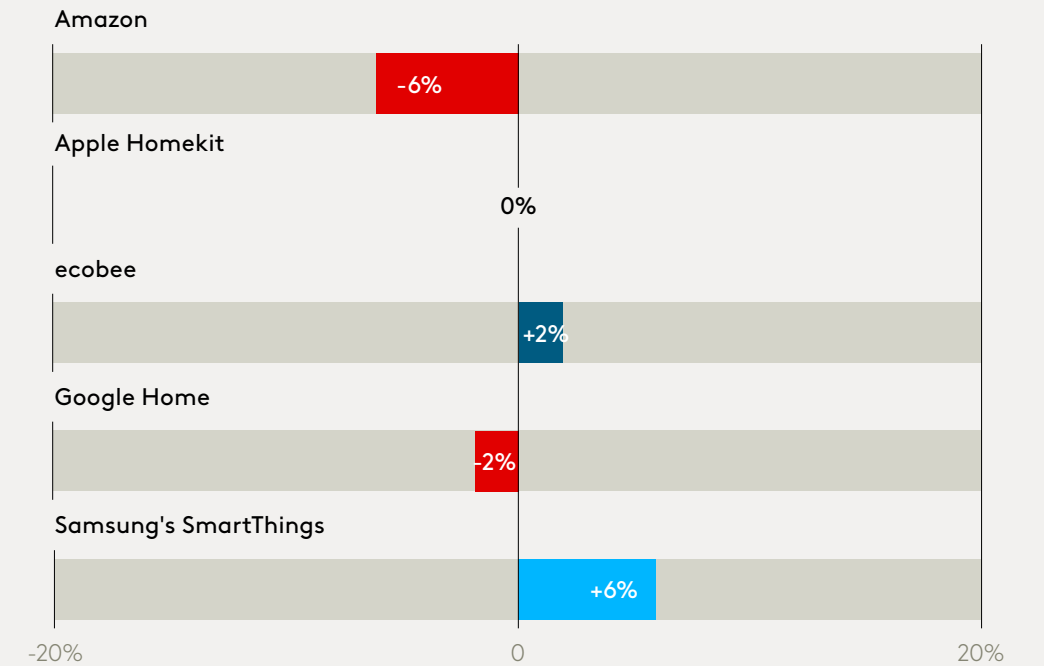
TOPICS THAT ARE DRIVING INTEREST OVERALL AND BRANDS ASSOCIATED WITH EACH TOPIC (MAY '22 - APRIL '23*)

■ Google Home ■ Amazon Alexa ■ Apple Homekit ■ ecobee ■ SmartThings



Consumer need: **Enable**

CHANGE IN SHARE* OF BRANDED SEARCHES BY CATEGORY



*% CHANGE in Share in Branded Search shows the growth in interest for the brand out of all searches in that category, for the selected time period

"The Samsung SmartThings Station might be my new favorite gadget. Matter hub, wireless charger, and home control button all in one. It all works so well."

Social expressions

So, what's **next?**

Macro drivers that are accelerating this trend

- Increasingly time-poor lives
- Rise in single-adult households
- Rapid urbanization and smaller, optimized dwellings
- Increasing demand for hyper-personalisation, automation, and outsourcing of time and energy-intensive tasks
- Rise in awareness of the true environmental impact of daily habits
- Fear of environmental harms e.g., pollution
- Gig economy and flexible-working
- Energy crisis

1

Intuitive homes

Harmonized smart homes will manage all safety concerns helping residents keep track of risks around them and manage them in-moment. Imagine a home that can warn of rises in pollen or pollution in the air so people can take preventative measures, or the home can react intuitively!

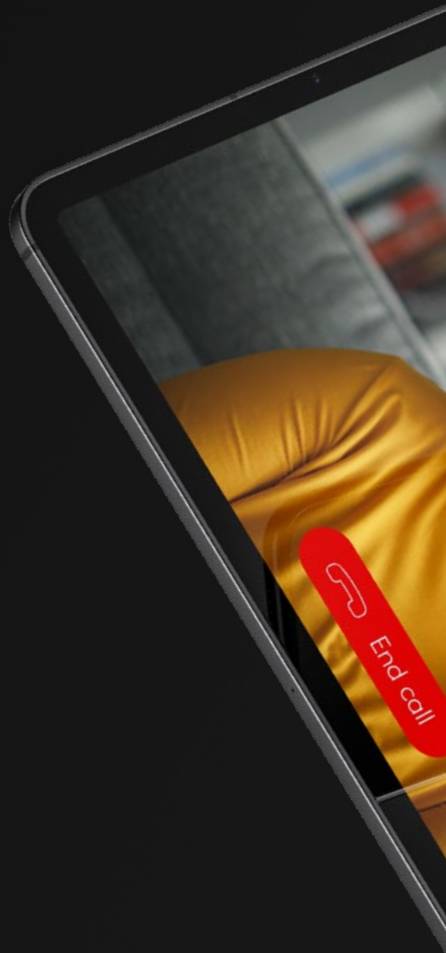
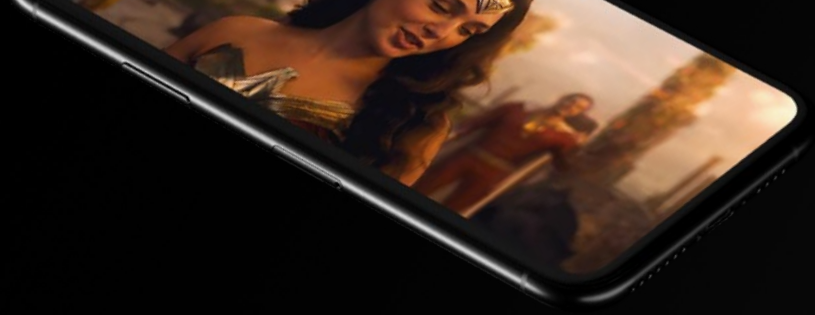
2

Sustainable homes

Homes will manage and reduce their negative impact automatically. People will have access to restorative technology and guidance to help manage their homes more smartly and with greater peace of mind. Imagine a future where homes are set up to utilise waste to generate energy - reducing reliance on strained power systems and reducing carbon footprint!

Ushering in the
era of **advanced
connectivity**

4



Trend definition

Moving from awareness to adoption, the switch is being made towards compatible tech devices to access **faster networks that help test and use newer innovations** in their everyday lives.

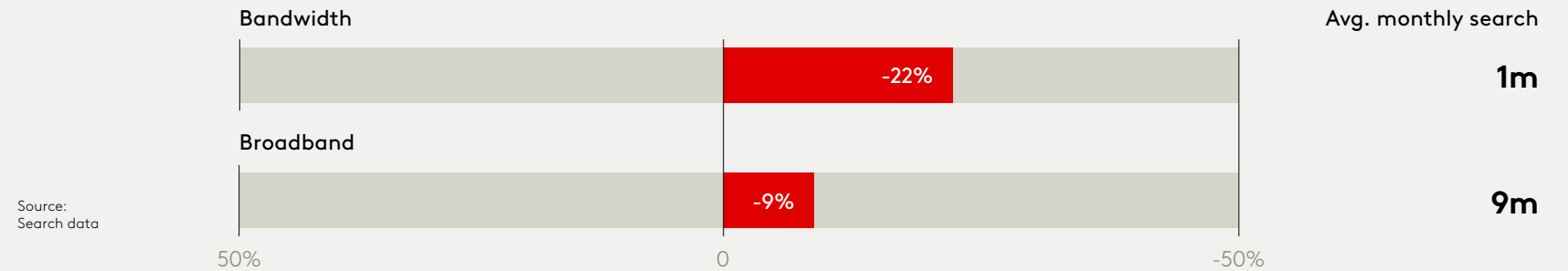
75m+

Average global monthly searches

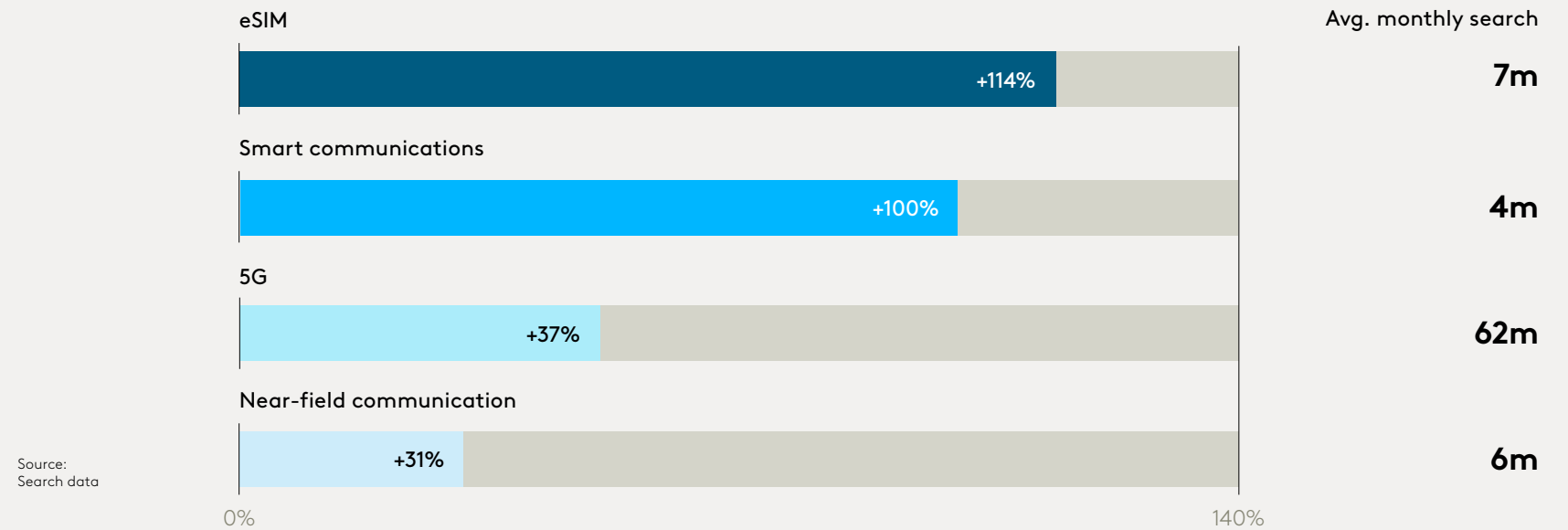


Consumer need: **Enable**

TOPICS THAT CONTINUE TO BE ON THE RADAR BUT ARE DECLINING (YoY)



TOPICS THAT ARE GAINING SIGNIFICANT TRACTION AND MOMENTUM



Consumer need

Speed and security accompany the core need for hassle-free tech adoptions. Interest in 5G skews from countries in Asia (**Bangladesh, India, Nepal**) as technology makes its way to the on-the-go population there. eSIM (digital SIM that allows consumers to activate a cellular plan from their carrier without using a physical SIM) migration also picks up steam.

Therefore what lies ahead?

Once the understanding of the technology is established, the narrative changes very quickly toward brands offering or enabling it. 5G conversations are all in the context of cell phone brands. The race to capture the attention of the migrating consumer looking to upgrade without breaking the bank is fierce. Multiple sub-brands offering 5G-enabled handsets emerge to cater to this demand in Asia.

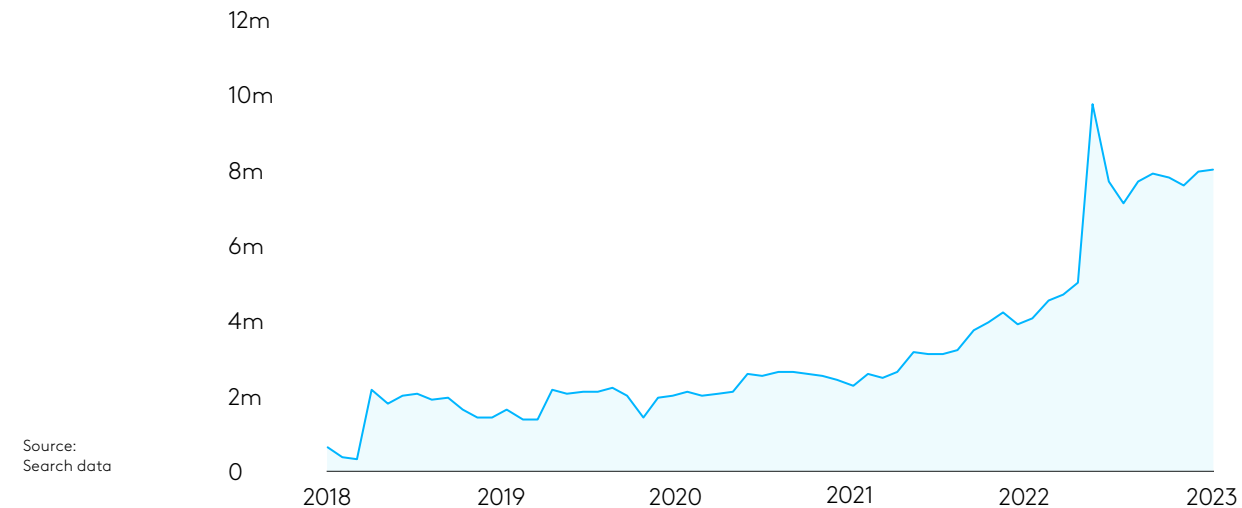
Poco (Xiaomi), Realme (former sub-brand Oppo), and Iqoo (VIVO) are all sub-brands catering to this need. Therefore, how do brands create value to differentiate their proposition?

"The 5G coverage at this train station is amazing. Within 30 mins, I could download the *Fast & Furious* movie collection from iTunes on mobile data! I know 5G is fast, but I am amazed that I downloaded ~40 GB of movies on it!"

Social expressions



INTEREST IN eSIM

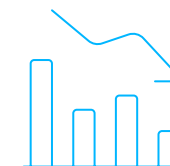


Source: Search data

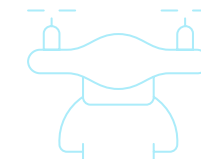
Core consumer needs linked to this trend.



Improved speed



Lower latency



Better access to tech enhancements

So, what's **next?**

Macro drivers that are accelerating this trend

- Increase in time-shifting, flexible-working, and digital nomadism
- Skills imbalance and unemployment in developing markets
- Gen Z grows in the workplace
- The rising influence of previously marginalised groups

1

Talent without borders

Global workplace accessibility is on the rise, adding value across continents. Previously marginalized groups in developing countries, including low-income individuals, are now actively participating. This means your most talented financial director could be a single mother in Kerala, benefiting from advanced connectivity. Additionally, the expansion of 5G is enabling "work tourism," boosting economies worldwide.

2

Level playing field

Knowledge and skill acquisition are frictionless, giving more people access to more skilled work and greater earning potential. Workplaces become more competitive, giving rise to better outcomes and leveling the playing field for all.

3

Emergence of new gate keepers

A new class of inter-jurisdictional tax experts grows and dominates the role of gatekeeper of workflows across the global workplace.

Privacy and protection

Safe and responsible access
to digital as a must



5

Trend definition

Privacy continues to be top of mind as consumers increasingly rely on tech to enable and empower their lives. **Their drive to protect themselves and their personal data becomes relentless.** They are extremely intentional about the type of data they share.

69m+

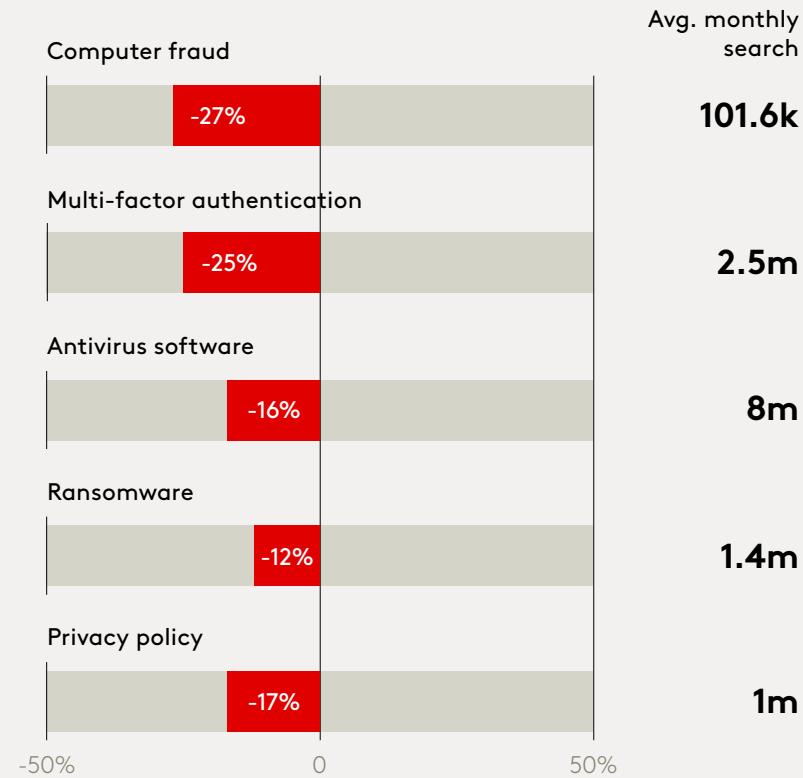
Average global monthly searches



Consumer need: Protect

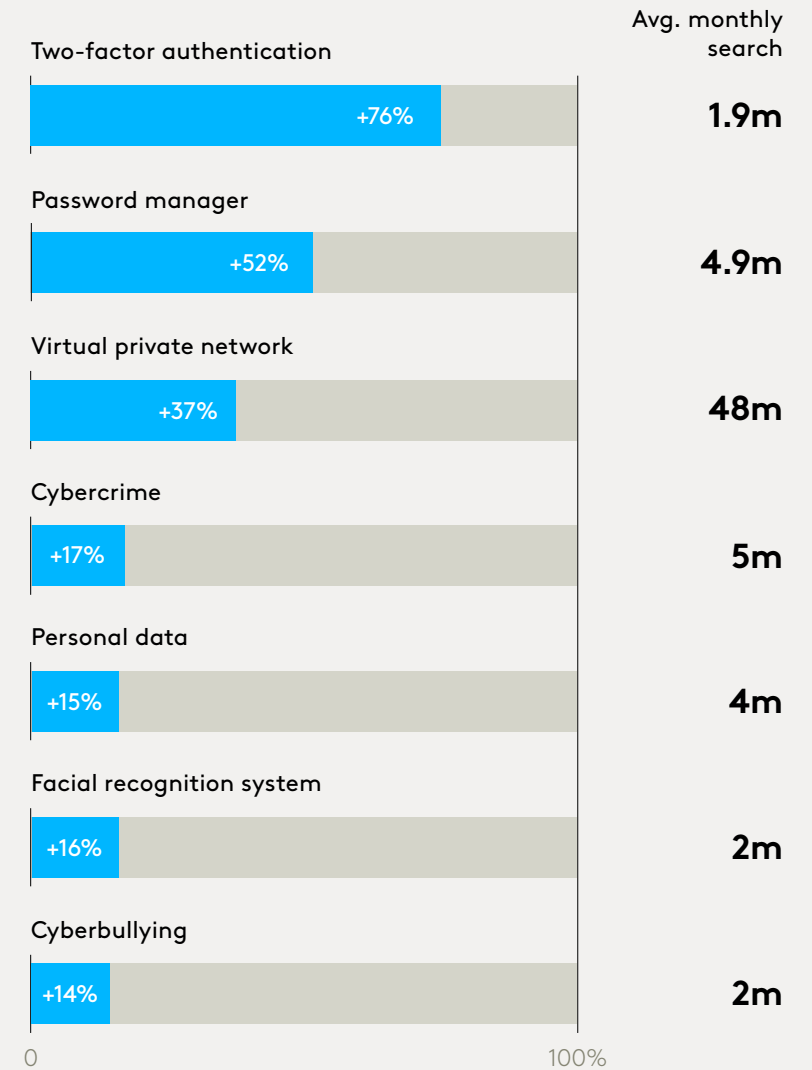
TOPICS THAT CONTINUE TO BE ON THE RADAR BUT ARE DECLINING (YoY)

Source: Search data



TOPICS THAT ARE GAINING SIGNIFICANT TRACTION AND MOMENTUM

Source: Search data



Consumer need

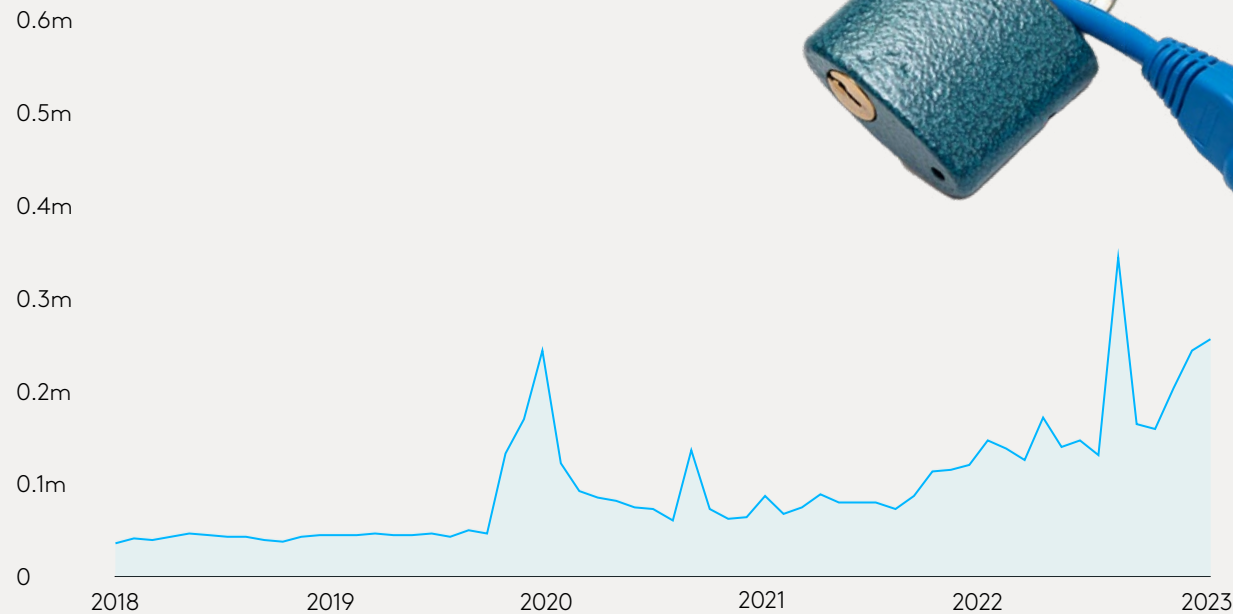
Consumers are taking matters into their own hands to protect themselves. The consistent rise of data breaches across the globe continues to fuel this distrust. This tension is palpable based on search behaviour as they seek information and learn courses to better equip themselves.

Therefore what lies ahead?

There is a need to rebuild trust. Consumers want to be in the driving seat with the ability to opt-out easily and revoke access to their data. Do privacy policies need a simple overhaul that clarifies what, when, and where customer data will be used, along with who has access?

Brands must actively differentiate themselves through deliberate, positive measures within this area.

INTEREST IN END-TO-END ENCRYPTION

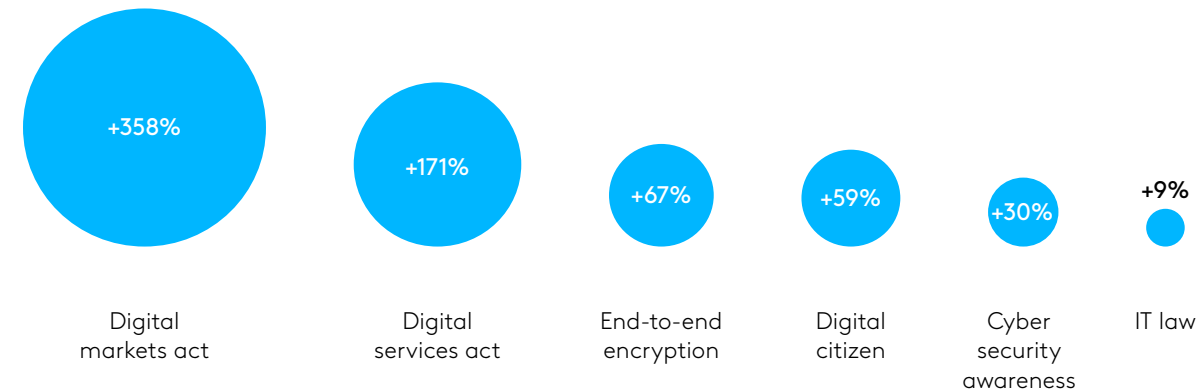


Source: Search data



DISRUPTIVE TOPICS RANKED BY GROWTH (YoY)

Source: Search data



Core consumer needs linked to this trend.



Transparency



Easy to understand



Theft prevention

How brands are already **innovating** to address this trend



Boris the BabyBot is the world's first children's book about surveillance. It offers basic visual references for invisible and abstract concepts of data collection, which help shape a child's awareness of these processes ¹⁰.



Wallets that are enabled with technology and app-based connections to protect or warn from theft ¹¹.



Deeptrace, the Dutch company, claims to be the 'antivirus for deepfakes'; the first-to-market deepfake detection solution is designed to guarantee the integrity of visual media. Deeptrace sees the same adversarial machine learning and computer vision used to create deepfakes as a primary tool for detecting them ¹².

So, what's **next?**

Macro drivers that are accelerating this trend

- Rising capabilities of deep-fake technology and AI
- Rise in scam-culture
- Tech control – the hidden impact of media platform owners like Meta and writers of content legislation
- Rise of cybersecurity and privacy concerns
- Rise of AR, VR, and mixed reality
- Declining trust in traditional sources of information and authority

1

Monetisation moves to the consumer

Consumers will take matters into their own hands, demanding fairer and easier-to-understand terms and conditions. Expect a rise in rewrites of data-protection laws that safeguard the average consumer.

Consumers, supported with tech and innovation from activist groups, will find ways to take ownership of their data and monetise access at their discretion.

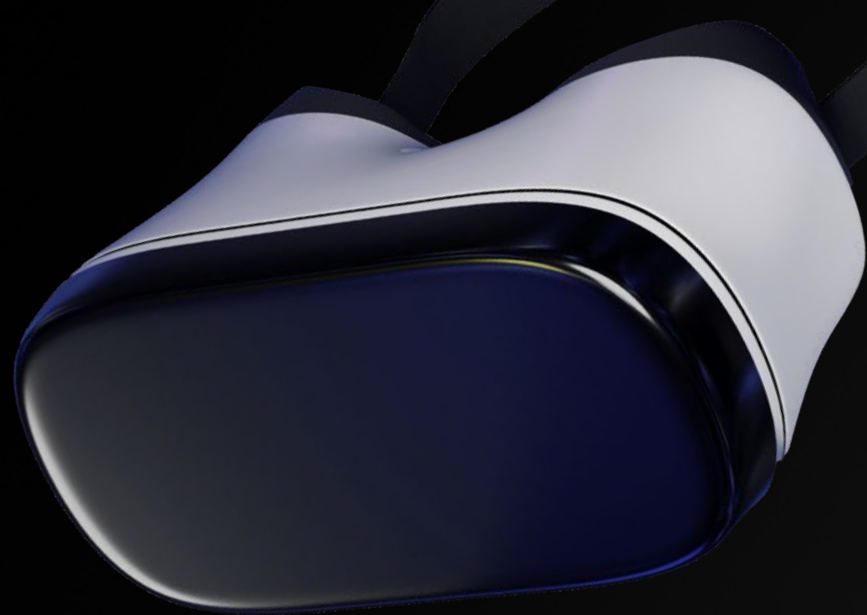
2

AI and deepfake detection

With the proliferation of AI-generated content and deepfakes, expect a rise in technologies to help consumers decipher what is real and what isn't, safeguarding them and their interests.

Gaming **redefined**

As brand-enabled communal
creative endeavours



6



Trend definition

Access to faster internet and portable gaming devices helps casual and hard-core gamers **play on-the-go online** with friends and family, near and far. **Exclusives give way to multi-device** games like Roblox and Minecraft.

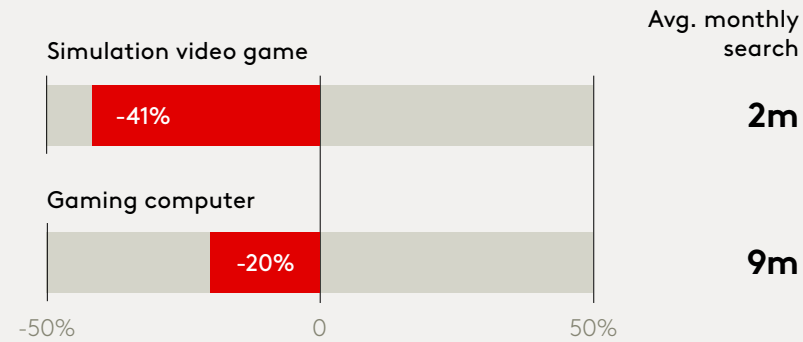
196m+

Average global monthly searches



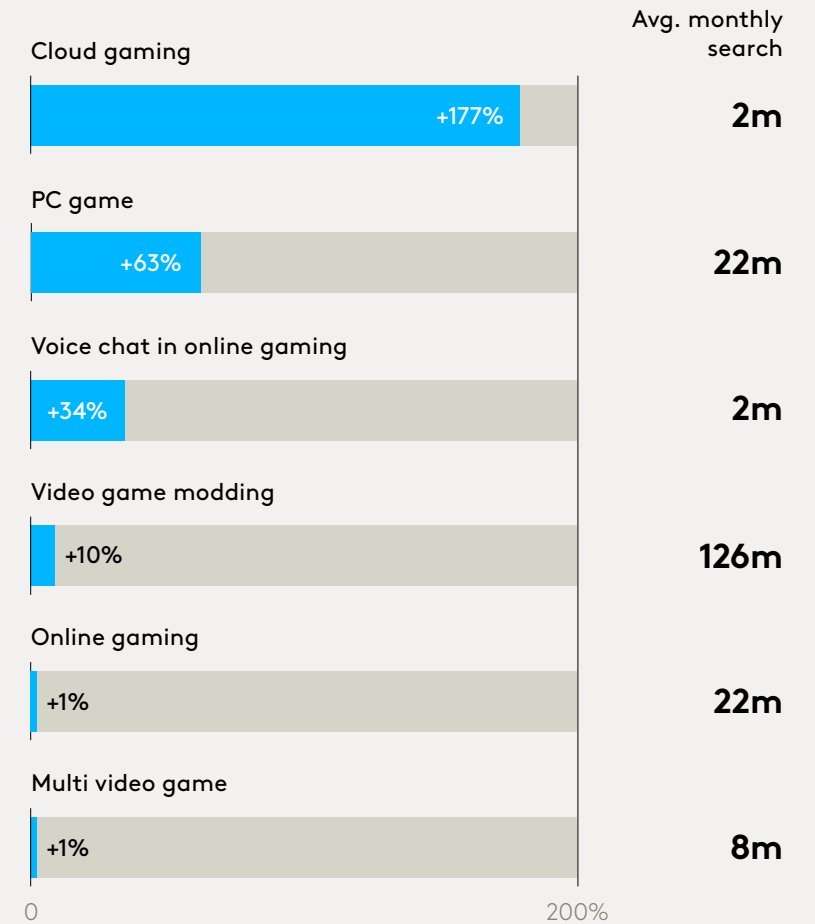
TOPICS THAT CONTINUE TO BE ON THE RADAR BUT ARE DECLINING (YoY)

Source: Search data



TOPICS THAT ARE GAINING SIGNIFICANT TRACTION AND MOMENTUM

Source: Search data



"I love that I can cross-save/cross-progression, on a console or PC, even during travel."

Social expressions

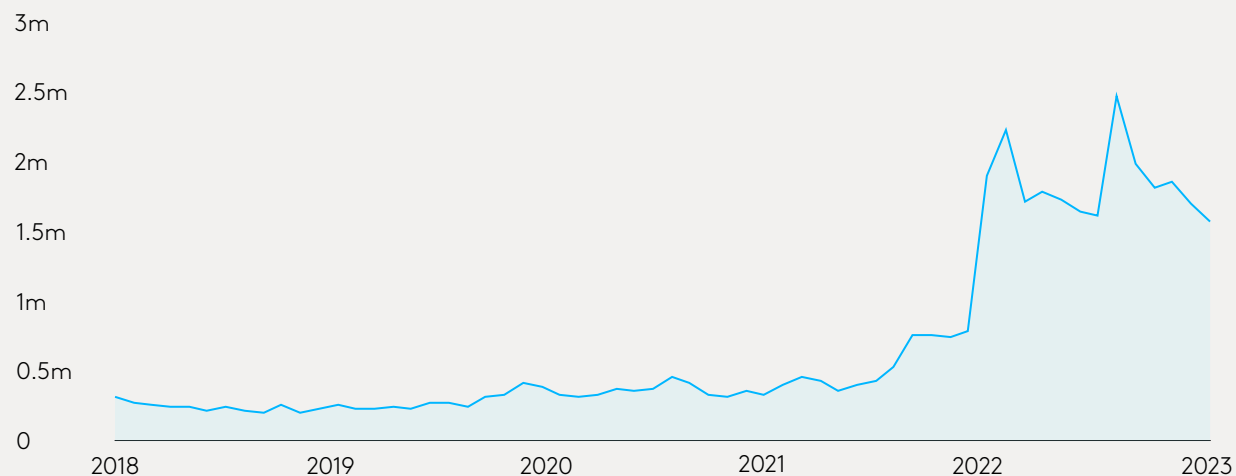


Consumer need

The need for versatile play engenders the desire to create and choose dynamic gameplays and share those experiences. Gamers now want to go beyond traditional gaming to connect, create and share via voice chats, gameplays, shared mods, or mapping quests.

INTEREST IN CLOUD GAMING

Source: Search data



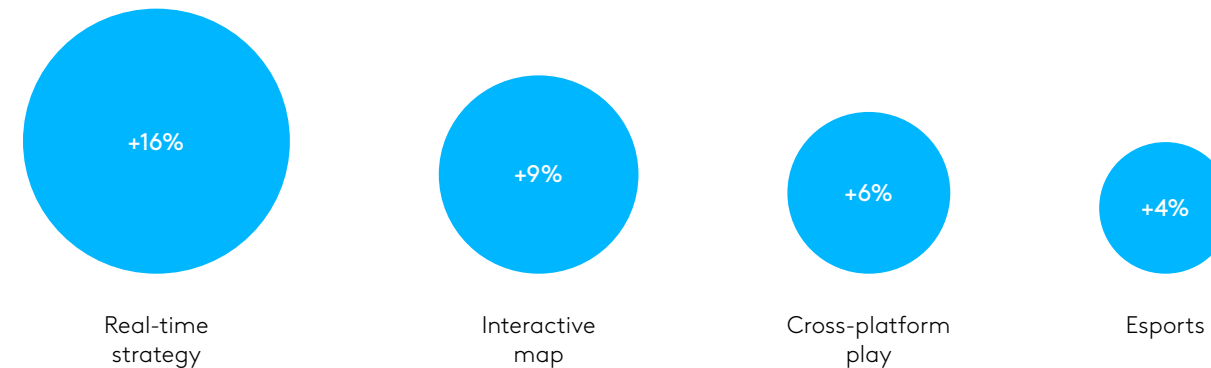
Therefore what lies ahead?

Two clear areas of engagement emerge.

- 1. Linked directly to the software and hardware:** Improve accessibility to all enthusiasts. Capitalises on the interest in cloud gaming's plug-and-play model by innovating for latency and aiding the switch from expensive hardware. Enables diverse playstyles and elevated immersive experiences to cater to the needs of the creative gamer. AI-generated customisable NPCs (Non-player character), gameplays, and dialogues create the route to win the fierce competition for gamers' attention.
- 2. Linked to tapping into a platform:** More than half of the world's population convenes to escape the routine of every day – an opportunity for even the beyond-gaming brands to get in on.

DISRUPTIVE TOPICS RANKED BY GROWTH (YoY)

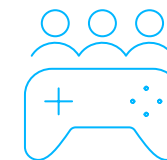
Source: Search data



Core consumer needs linked to this trend.



Access



Community



Creative freedom



Overall gaming revenue ¹³

\$203b

Share of overall gaming revenue from smartphones or tablets ¹³

51%

Game consumers globally ¹⁴

3.7b

Hardware-driven consumers ¹⁴

300m

Gamers belonging to the 18-34 cohort (US) ¹⁵

38%

Gamers identifying as female ¹⁶

48%

Gamers who are ages 55+ (US) ¹⁵

16%

Asia has more gamers than any other region ¹⁷

2x

The voice of the hyper-casual gamer often gets overlooked, considering their contribution towards driving revenues for game companies ¹⁴.

Gamers differ vastly in their motivation. Players of games like League of Legends, CS: GO, or Dota 2 focus more on competition and excitement, while players from Animal Crossing or City of Heros are all about the fun of discovery, community, or design ¹⁸.

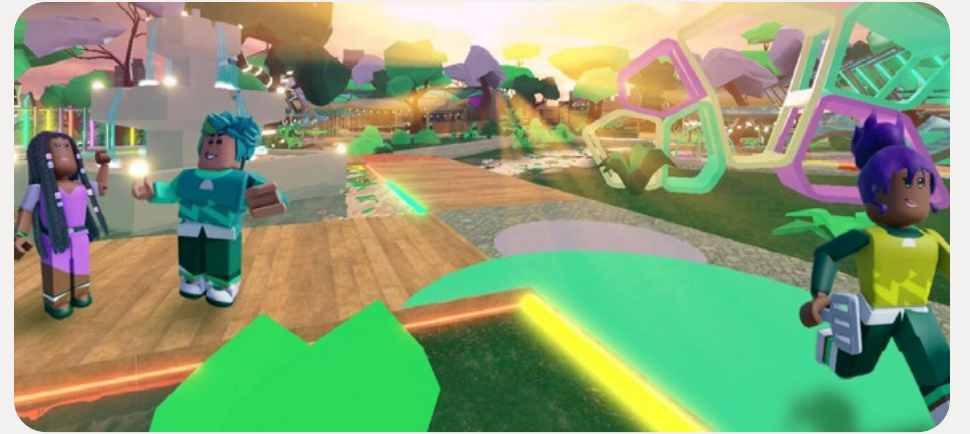
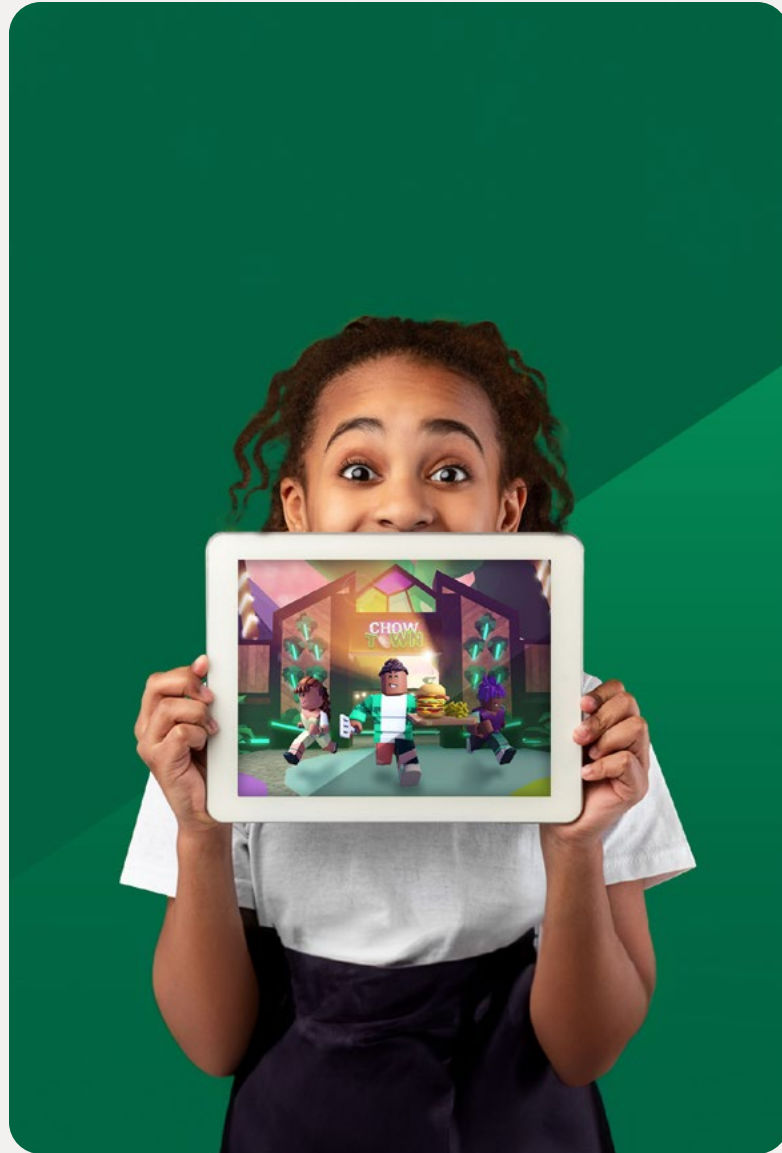
Given the dynamic nature of the audience, a one size fits all approach would not apply. However, the desire to connect, bond, and create is a common thread that binds them into a supportive online family. In this light, Cooperative Gameplay will be an integral part of gaming for years ¹⁹.

Brands need to be conscious of how they tap into this space as they curate and create the narrative around themselves. Representation is at the heart of everything; consumers want to be heard, acknowledged and included. To this end, brands must ensure that they adequately support minorities, whether race, sexual orientation, gender, or people with disabilities.

"Gaming has always been there for me. A couple of games with friends changes a bad day in seconds."

Social expressions

How brands are already **innovating** to address this trend



Nedbank Chow Town is a brand-owned game in Roblox, developed by one of South Africa's leading banks to help children learn about money management.

So, what's **next?**

Macro drivers that are accelerating this trend

- Rising capabilities of AI-tech
- Rise of AR, VR, and mixed reality
- Rise in metaverse culture, digital currencies, digital art, etc.
- Globalised pop culture
- Insular living
- Single child households

1

Immersive interactivity

Gamification becomes a basic expectation as consumers demand experiences that are more immersive, entertaining, and memorable. Consumers expect interactivity everywhere, as everything in the physical world becomes information-rich and responsive – not just interactive.

2

Immersive spectatorship

Beyond e-sports, expect more engagement in gaming for entertainment and competition. More players across gaming formats join the playing field, and gaming grows to become an immersive spectator sport offering opportunities for brands to get involved.

3

Gamified education

Education is gamified, making content more interesting, human, and memorable, giving all types of thinkers a format in which they can learn.

The innovation **angle**

Innovation in tech requires meaningful differentiation



Nidhi Rustagi
Global Director
Products and Services, Innovation
Kantar



Kantar firmly believes that for innovation to be successful, it must be both meaningful and different.

In simple terms, successful innovation should be "meaningfully different." This overarching principle applies to innovation in technology and its role in *fostering* innovation.

We are inspired by the wisdom of Steve Jobs, an iconic technological visionary who once proclaimed:

"True innovation lies in revealing what people desire before they even know it. That's why market research alone is not my reliance."

Many in the tech industry have taken this statement at face value. While people may not be able to envision new products, they can determine whether they want something when it is presented to them and whether it addresses real needs.

The true power of consumer understanding lies not in mindlessly accepting people's opinions but in deliberately investigating how people respond to innovation throughout its development journey. This principle holds for technology as well.

Empowering consumer foundations

Building upon a strong foundation of consumer insights, the emerging trend of the "tech-enabled lifestyle" aims to place people at the core of the innovation process. By analysing consumer expressions related to tech and brands, innovators can develop hypotheses and question the underlying **why** (motivations) driving these trends. The overarching themes of **Protect, Enable, and Entertain**, with consumer trends and expressions underneath, reveal the necessity to delve deeper into identifying tension. These tensions present opportunities for brands to construct unique propositions and deliver them meaningfully differently.

For instance, consider the need to balance growing interest and concern in tech. The curiosity surrounding AI, 5G, and cloud gaming is juxtaposed with the need to address protection-related areas like password managers and privacy features. This tension indicates the opportunities for brands to bridge the gap with disruptive innovation.

Steer your innovation pipeline in the same direction as consumers

Emerging trends reveal trends across established, mainstream and disruptive factors. The objective is to follow trends and understand their evolution. This knowledge is a valuable guide for planning an innovation pipeline portfolio encompassing core, adjacent, and disruptive elements.

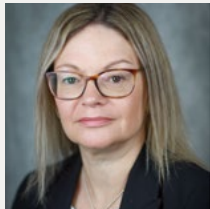
Let's take the banking industry as an example. Banking remained largely unchanged for centuries, untouched by disruption. However, of late, fintech companies without brick-and-mortar footprints have revolutionised the banking model. The "gigification" of banking has led to numerous apps and services that compete with traditional banks as they offer options for loans, payments, and investments. Consumers now have eWallets provided by apps instead of conventional banking relationships.

All roads lead to brand purpose

The fundamentals of what defines great innovation remain the same, and one such principle is about "fit the brand." Ensuring your innovation aligns with the brand and serves as a lever to realize purpose is crucial. The industry faces significant challenges, such as the ethical dilemma posed by the rapid advancement of AI and robots or concerns regarding privacy in accessing health data for personalised experiences. All these challenges must be evaluated and assessed through the lens of the brand. Just because a technological innovation addresses a genuine need does not automatically make it a suitable fit for a specific brand.

The **sustainability** narrative

The growing intersection of tech and sustainability



Dr. Nicki Morley
 Head of Behavioural Science and Innovation Expertise
 Transformation Practice
 Kantar, UK

While searches linked to sustainability in the context of tech are low in volume (>3m average monthly searches), they show an upward trend in growth year-on-year.

Consumers are doing what they can to mitigate the impact in line with inflation and spiraling energy costs. Given the direct impact on self, many are thinking ahead and actively seeking smart meters (+35% YoY), smart thermostats (12% YoY), and solar panels to manage how they consume and generate energy. These findings align with what was uncovered in our sustainability report from the *Finding the Future series*.

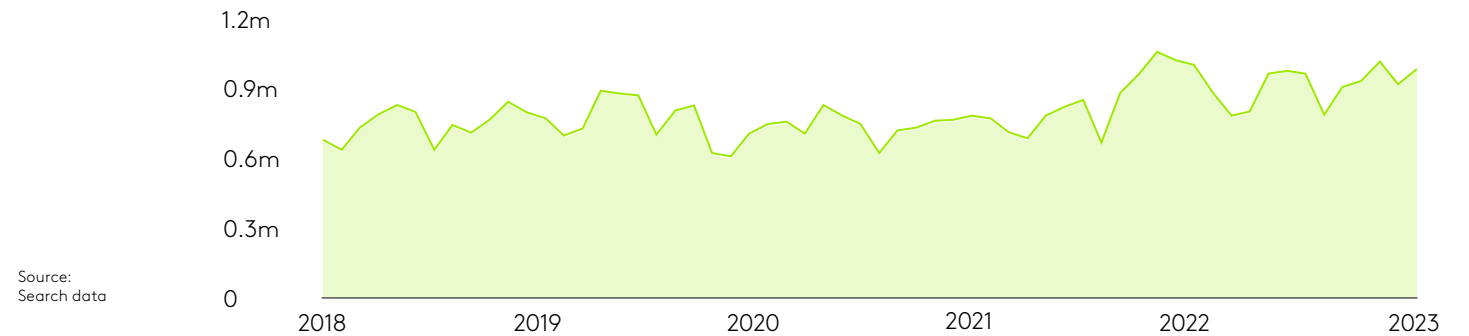
There is a growing consciousness as interest spikes in topics such as electronic waste (7% YoY growth), and new ones such as mobile phone recycling and electronic right-to-repair appear on the horizon.

Brands such as Fairphone and Framework Laptop walk the talk on their sustainability agenda by transparently tackling the topic of e-waste, environmental damage, and exploitation by actively promoting a circular method of purchasing tech. Lyft has partnered with Redwood Material to recover and repurpose dead or broken batteries to reduce waste and carbon emissions.

The secondary market for refurbished smartphones grew globally by 5% in 2022. India led the global refurbished smartphone market in 2022 with 19% YoY growth, followed closely by LATAM with 18% YoY growth. Apple captured 49% of the global refurbished smartphone market in 2022, followed by Samsung at 26%.

As the narrative evolves, tech brands must actively take ownership and invest in developing a circular business model that reduces waste, considers sustainably sourcing materials, and reusing resources. Brands must design for behaviour change and make it easy, meaningful, and rewarding for consumers to change their behaviour. Use behavioural science-inspired research approaches to identify the limiting beliefs that hold people back regarding more sustainable outcomes. We often see in our research that faulty beliefs and expectations are the strongest barriers to behaviour change. Seek out these beliefs early and design with them in mind.

INTEREST IN ELECTRONIC WASTE



Source:
Search data

Concluding thoughts

How do we expect the role of tech to evolve?



Renissa Gouden
Client Director, Future Offer Lead
Kantar, South Africa



The ultimate democratiser

Expect a future where tech gives more people access to goods and services previously only available to the wealthy, urban, and non-differently abled. Consider the limitations your goods and services are faced with today. Who is excluded from your offer, and how might tech be used creatively to include all?

Leveler of the global talent field

While we are more globalised than ever, there are groups of talented individuals in corners of the world with no access to the global marketplace. Tomorrow, your business will be able to find critical talent in previously unlikely places.

Gamifying life, making the mundane more memorable!

Tomorrow, gamification of everyday tasks will help make it easier to form good habits and make learning, work, and even interaction with brands and services more memorable and joyful. What expertise will you need for a more interactive future internally or externally via partnerships? Will deeper forms of interactivity impact your strategic – or brand-planning cycles? How will it affect what kinds of stories you can tell consumers?

Protecting our bodies and homes

Tomorrow, protecting our physical bodies and our homes from external harm will entail less guesswork. Does your brand serve to protect? How might you evolve to work with smarter, harmonised homes or health tech that helps people understand and act on risks?

Protecting us from the harms imposed by tech

Tomorrow, expect more solutions that help consumers decipher what is real and what isn't, safeguarding them against scams and other online risks. If your market pivots toward personal data being owned or being able to be owned by individuals, how will that affect your business model? In the face of legal uncertainty around digital rights, how might your brand show leadership and build trust around your digital practices?

Facilitating our allyship with the planet

Tomorrow, tech will help us diagnose and correct our impact on the planet, from managing our carbon footprints to taking restorative measures to undo negative impact. How might your brand become a part of a lifestyle where consumers are empowered to make choices based on real sustainability?



So, what's the verdict: Is tech a friend or foe?



Serene Wilson
Global Insight, Dx Analytics
Kantar



Our inquiry into **36bn+ search data points** across the globe creates a compelling narrative about the role, value, and importance of tech in the consumer's world.

While the hot debate about AI – robotics taking over jobs, livelihoods, and potentially the world – flares up, consumers do not show any signs of despair. It is not a case of doom and gloom.

On the contrary, there is a genuine interest to know more, understand, embrace, and adopt. They appear to be in control of the tech in their lives. When technology is new, searches are anchored wholly to understanding it. Once that has been established, the brand takes over.

They are in sync with the developments around them, and their engagement oscillates based on the peaks and valleys in their interest levels. Perhaps, it is a case of knowing when to switch or tune out. And they are doing just that, actively and with intention.

As AI gradually makes its presence felt across the different facets of their lives, many leverage it to elevate their experiences and or to simply enjoy everything it enables.

Increasingly, many choose to let their guard down by allowing AI-enabled robots to go beyond the space of function into an emotive/social territory. This now involves young children and elderly parents. Though niche, it presents insight into the willingness to open themselves further to everything that tech has to offer.

The understanding of tech and how it can be enabled to fuel their personal goals is not only established but also accepted. Many push the envelope further by demanding and increasingly embracing more. This acceptance permeates throughout their relationship with tech.

While privacy and personal data concerns remain, the level of searches once again points toward consumers equipped with varying degrees of knowledge, skills, hardware, and software to protect their interests. They are not waiting to be saved. They are advocating for themselves.

Adopting some technologies takes time as awareness is built or, more importantly, when it is made accessible. 5G, for example, sees a resurgence as it makes itself mainstream within the Indian subcontinent. As a result, the spillover is positive and fuels momentum around other industries (FinTech).

One can infer that tech is seen as both a friend and a foe. Consumers are not blinded by its allure, despite their fascination with everything it enables. They are genuinely cautious and are on the ball.



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