YouGov

TECHNOLOGY

FIRST IN LINE: EARLY TECHNOLOGY ADOPTERS AROUND THE GLOBE

YouGov analysis of technology adoption in six key markets

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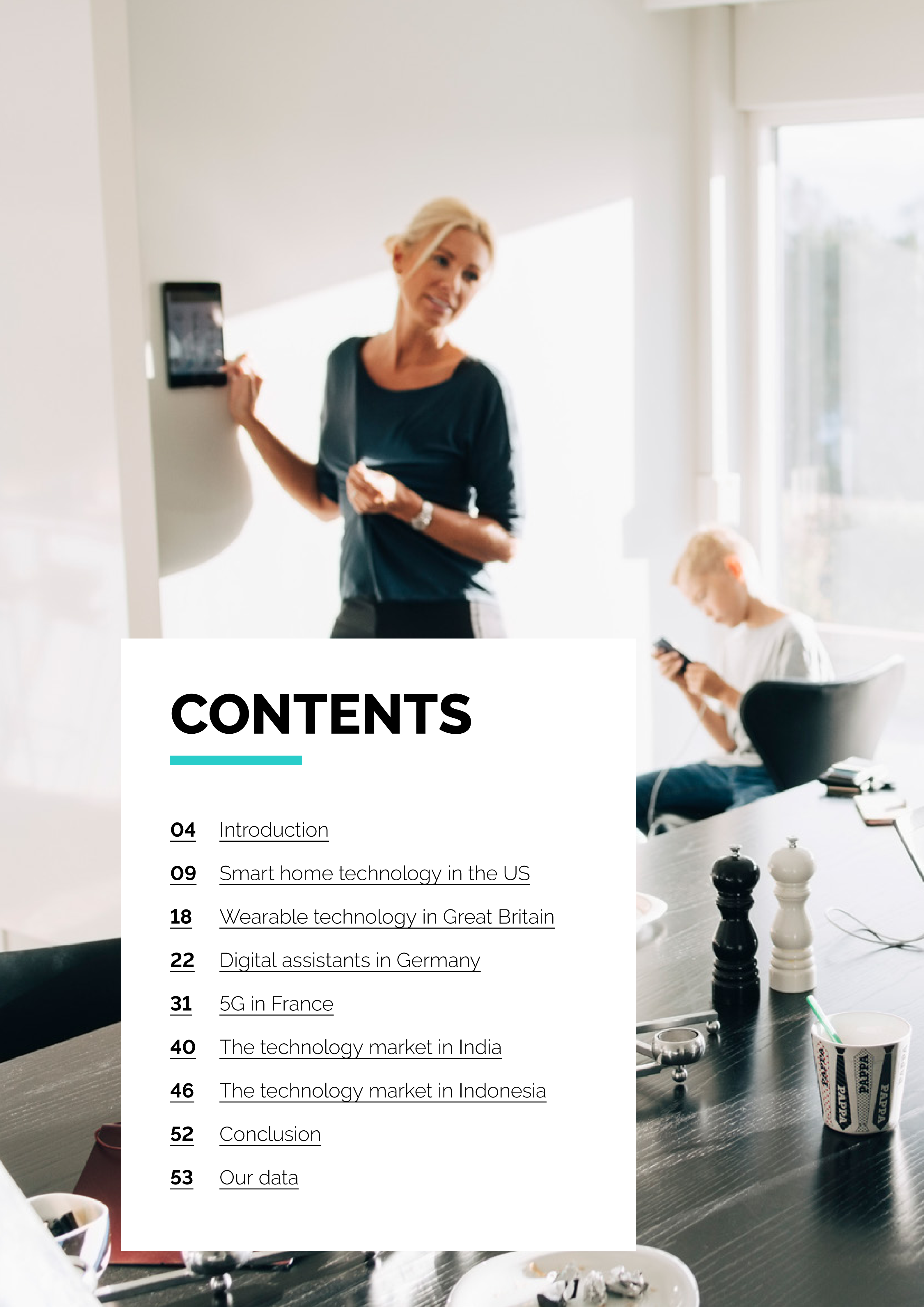

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INTRODUCTION

Technology inspires a singular passion among a certain subset of consumers: one that crosses international borders and a range of product categories.

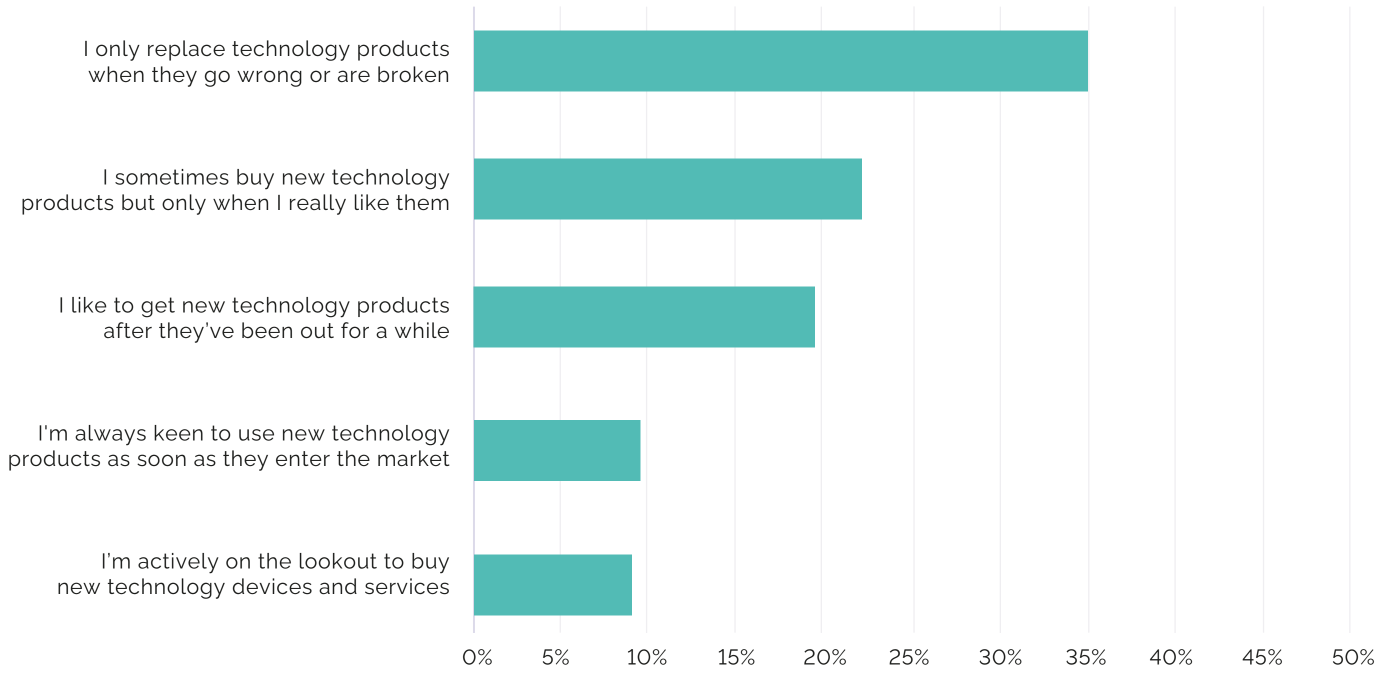
If many consumers are happy to wait until their smartphone breaks or their contract ends to secure a replacement, others are willing to camp outside in the cold winter weather just to upgrade to the latest and most powerful device. If most gamers do not buy a new Microsoft, Sony, or Nintendo console as soon as it comes out, enough do that the systems are usually sold out for months following their initial launch.
But who are these dedicated, highly engaged technophiles – and how can brands effectively target them?

YouGov Plan & Track data reveals that almost a fifth (18%) of consumers across 25 global markets are early adopters of technology – with 9% saying they're "actively on the lookout" for new devices and services, and 9% saying they're "always keen" to use new products as soon as they're available. This white paper examines the demographics, behaviours, and preferences of this potentially lucrative group in six nations: France, Germany, India, Indonesia, Great Britain, and the US.

Among other things, it explores how early adopters and more mainstream consumer groups perceive 5G, smart home technology, wearables, and digital assistants in these key markets – whether they are excited, indifferent, or even concerned about these technologies.

When do global consumers adopt technology products?

Thinking about technology products which, if any, of the following statements best describe you?[1]



[1] For this report, our global figures are arrived at through a mix of nationally representative, online representative and urban representative samples. See individual country sections for more details.

Technology adoption around the globe

Early adopters (the dedicated followers + the first wave) make up on average 18% of global consumers in our study. The precise proportion varies from continent to continent – and from nation to nation.

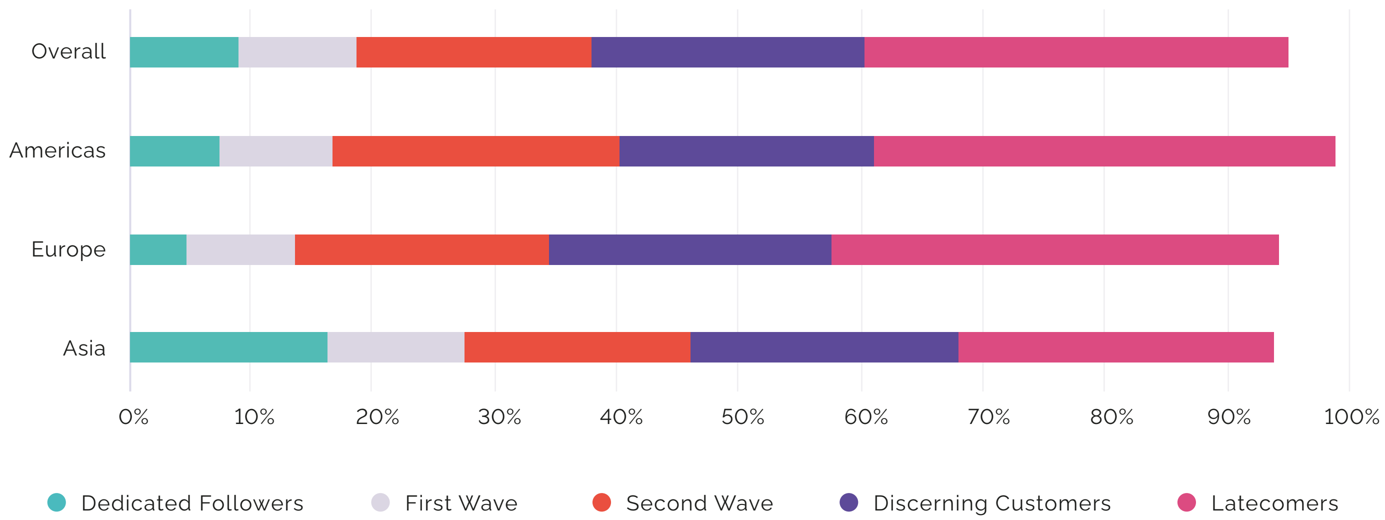
The picture is also complex because for this report the data is collected through a mix of nationally representative, online representative and urban representative samples (see table to the right for more details).

Asia has a significantly larger cohort of early adopters, with just under three in ten consumers (28%) fitting into this group and 16% fitting into the highly-engaged "dedicated followers" category. It also has a significantly lower number of latecomers (26%) than any other continent.

However, there is a high level of variation within the continent, and Asia should not be treated as a single homogenous bloc. India's urban population, for example, has the highest level of early adoption of any market in our study. Just under half (48%) of this urban representative sample meet our criteria – with three in ten (30%) belonging to the "dedicated followers" group. But on the other end of the scale, only one in ten Japanese consumers (8% - from a nationally representative sample) consider themselves early adopters, and just 3% say they are actively on the lookout for new technology products and services.

Accordingly, this white paper will avoid continental analysis and focus on attitudes to technology in individual nations.

Technology adoption across continents[2]



[2] Taken from a mix of nationally representative, online representative and urban representative samples.

Technology adoption by country

	Dedicated followers	First wave	Second wave	Discerning customers	Latecomers
AMERICAS					
Canada	7%	8%	24%	20%	42%
Mexico	8%	9%	16%	29%	38%
US	9%	9%	24%	21%	37%
EUROPE					
Denmark	4%	9%	24%	21%	42%
Finland	4%	9%	25%	23%	38%
France	7%	11%	18%	26%	37%
Germany	4%	10%	29%	22%	35%
Great Britain	4%	7%	19%	21%	49%
Italy	9%	9%	30%	18%	34%
Norway	8%	7%	23%	28%	34%
Russia	3%	5%	17%	38%	37%
Spain	5%	12%	19%	23%	41%
Sweden	11%	10%	19%	29%	31%
ASIA PACIFIC					
Australia	10%	10%	25%	20%	35%
China	14%	11%	28%	21%	26%
Hong Kong[4]	12%	15%	35%	18%	20%
India[3]	30%	19%	17%	20%	15%
Indonesia[4]	23%	9%	18%	20%	30%
Japan	3%	5%	17%	37%	38%
Malaysia[4]	9%	11%	17%	22%	40%
Philippines[4]	20%	9%	12%	23%	36%
Singapore	11%	12%	22%	23%	31%
Taiwan[4]	16%	4%	20%	37%	23%
Thailand[4]	17%	11%	22%	28%	23%
Vietnam[4]	25%	17%	16%	20%	22%

[3] Urban representative sample
[4] Online representative sample

On a demographic level, early adopters are more likely to be:

- **Younger.** The largest proportion are often within the 18-34 age groupings
- **Male.** Men make up a larger proportion of early adopters than women.
- **Affluent.** The technophiles in our study are more likely to have a high monthly disposable income. Given that cutting-edge technology products can be expensive for the average consumer – the iPhone 12 Pro, for example, retails at 999 USD – this makes sense.

The world's early adopters are more likely to agree with the following statements than the general public:

"Technology changes my life for the better"

"I believe there is a technological solution to all of humanity's problems"

"I think, in the future, artificial intelligence will help humans in most of their daily tasks"

"I think robots will become part of our daily lives"

These attitudes suggests that their high levels of engagement aren't just about having the latest and most advanced gadgets – but part of a forward-looking, philosophical interest in technology and what it can do for humanity. If the average consumer thinks of robot servants as something out of *The Jetsons* or *Westworld*, the early adopter may think they're inevitable.

SMART HOME TECHNOLOGY IN THE US

Smart home technology has occasionally been reduced to a collection of gizmos and gimmicks: voice-controlled lightbulbs, wifi enabled ovens, apps that allow consumers to change the temperature on the thermostat without ever getting off the sofa.

But beyond convenience and luxury, smart home technology is a growing and increasingly diverse market – one with applications that encompass entertainment, security, elder care and far more.

This chapter examines the attitudes that early adopters and the general public hold towards smart home technology in the US.

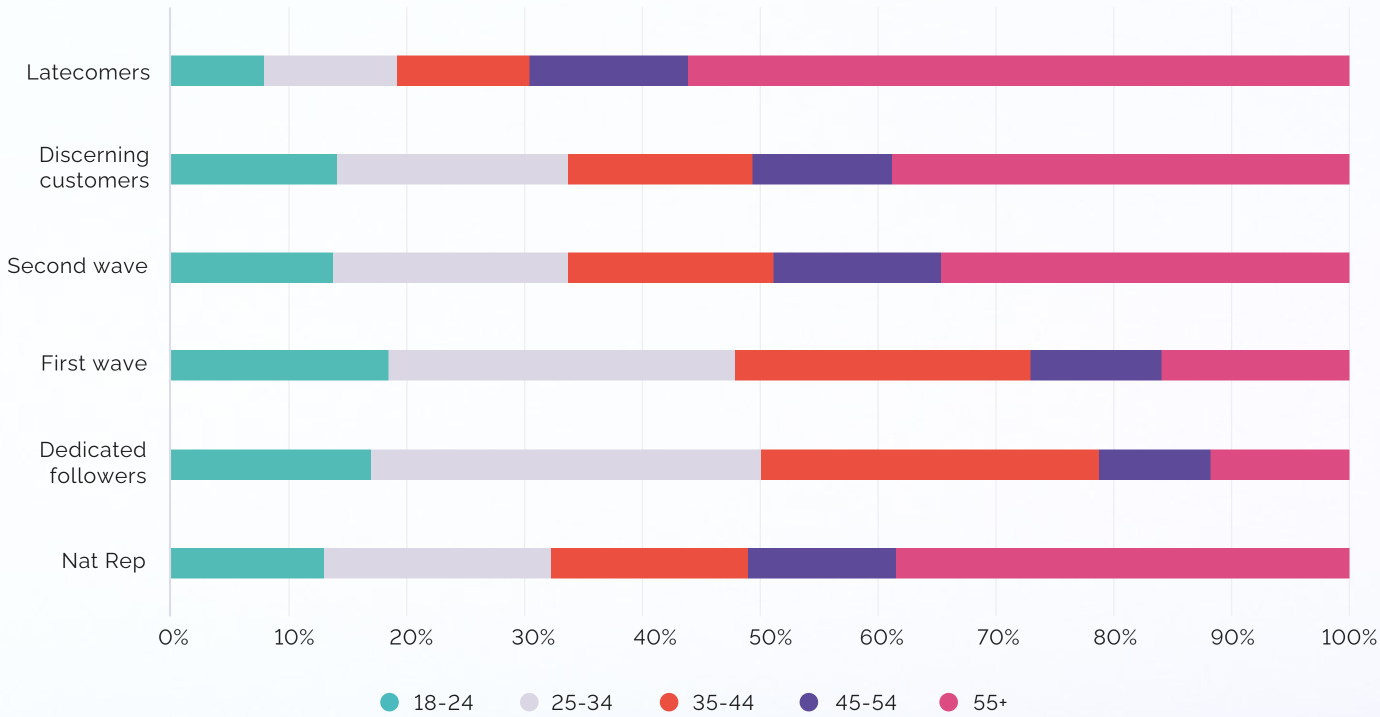
Early adopters in the US market

In terms of technology adoption, the US market is closer to the median than any other market in our study.

Early adopters account for 18% of all consumers – the exact same percentage as the global average. Even when we break the early adopter group into its constituent elements, the percentages are precisely alike (Dedicated followers 9%; First wave 9%).

It's the same story with discerning customers (21%) and latecomers (37%). Counterintuitive though it may sound, the US market is distinguished largely by how little it deviates from the global norm.

US: Technology adoption by age



In terms of demographics, early adopters are on the younger side. People aged 18-34 account for half (49%) of all dedicated followers – the most highly engaged group – and nearly the same proportion of first wavers (47%). At the other extreme, the less interested a group is in technology, the more likely it is to be older: over-55s account for three-fifths of latecomers (57%). The gender breakdown of America's early adopters is heavily male. Two-thirds of dedicated followers are men (67%) and a third (33%) are women, while six in ten (61%) first wavers are men and two-fifths are women (39%). As groups get progressively less interested in technology, the gender balance evens out – and among US latecomers, it becomes more heavily female (61% female vs. 39% male).

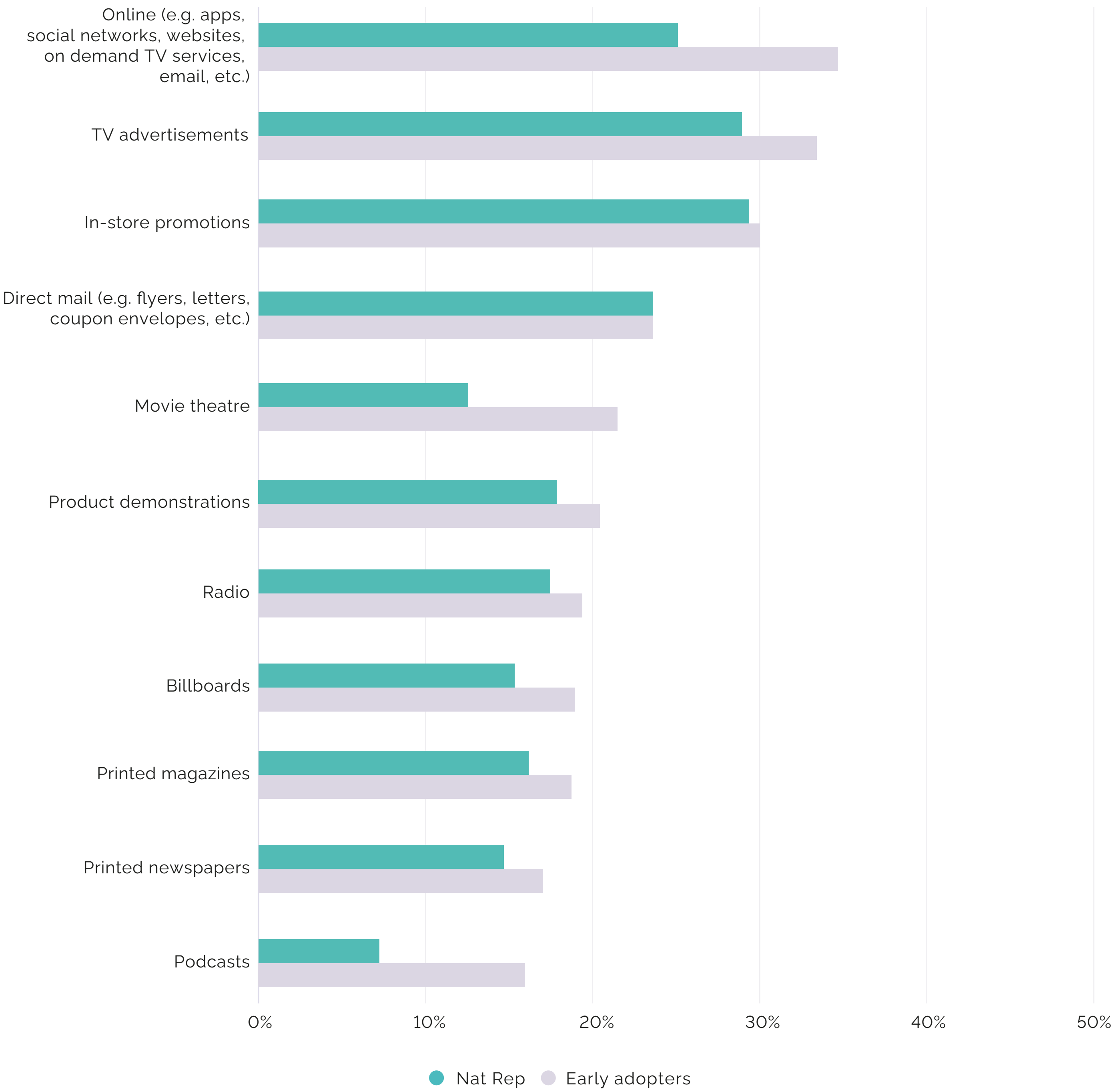
Early adopters in the US also stand out in some of their attitudes – in particular they seem to take pride in being ahead of the curve in other respects too.

For example, they are almost twice as likely to say that people ask them advice before buying things (72% early adopter vs. 37% nat rep). They are also much more likely to say that they 'usually know all the new and emerging music artists' (51% early adopter vs. 23% nat rep) and that they are 'expert at finding bargains online' (77% early adopter vs. 52% nat rep).

As well as liking to stand out in these respects, there are other differences in behaviour and attitudes to note.

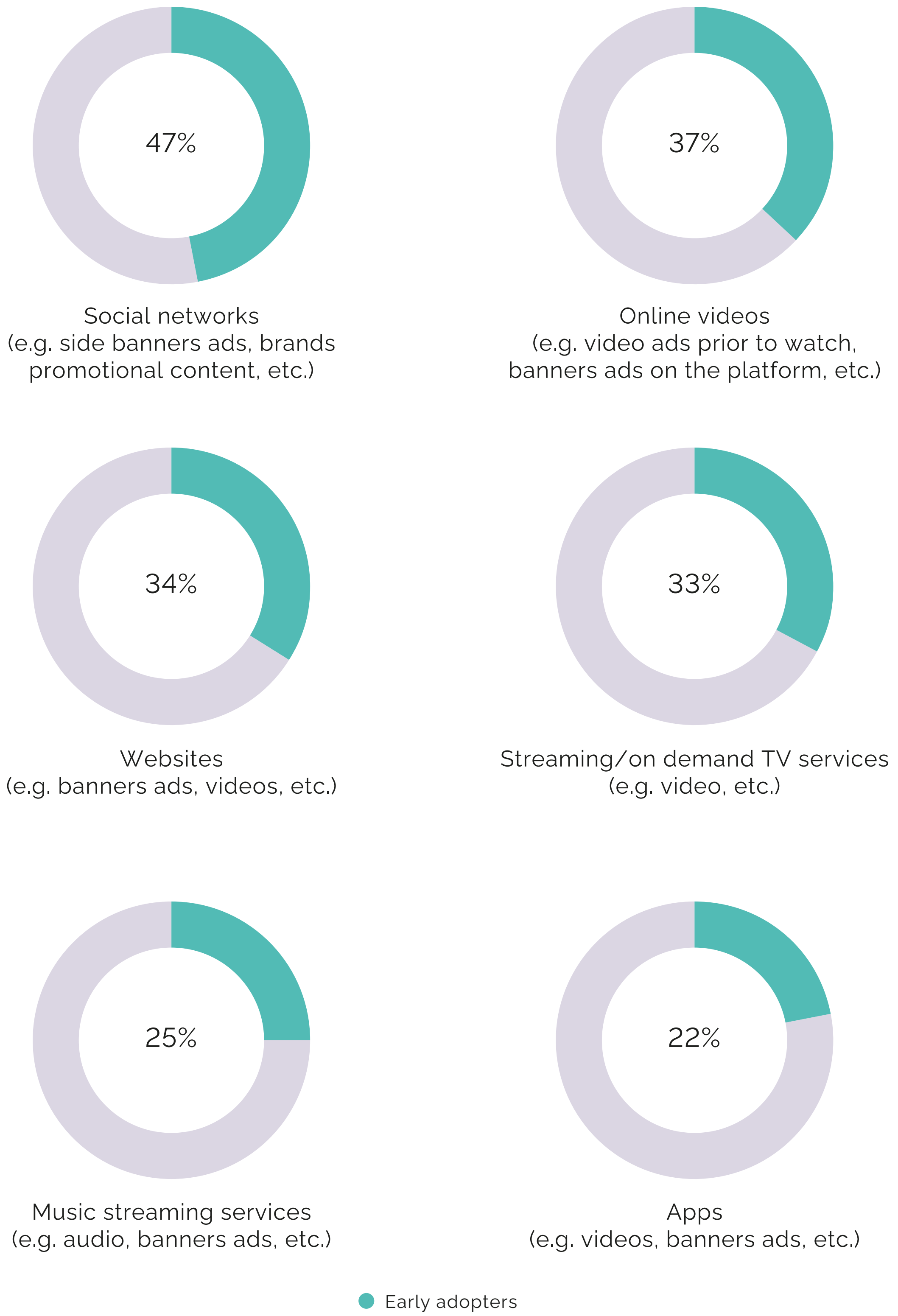
The types of advertising that early adopters prefer

"Thinking about how brands engage with customers, which, if any, of the following types of advertising do you like?"



Early adopters like online advertising significantly more than the general population – and that is their preferred medium for marketing – but they over-index most when it comes to podcast advertising. They are more than twice as likely as the general population to tell us that they like to be engaged here so podcasts look like a good value bet for technology marketers who wish to engage with this group.

The types of advertising that catch the attention of early adopters

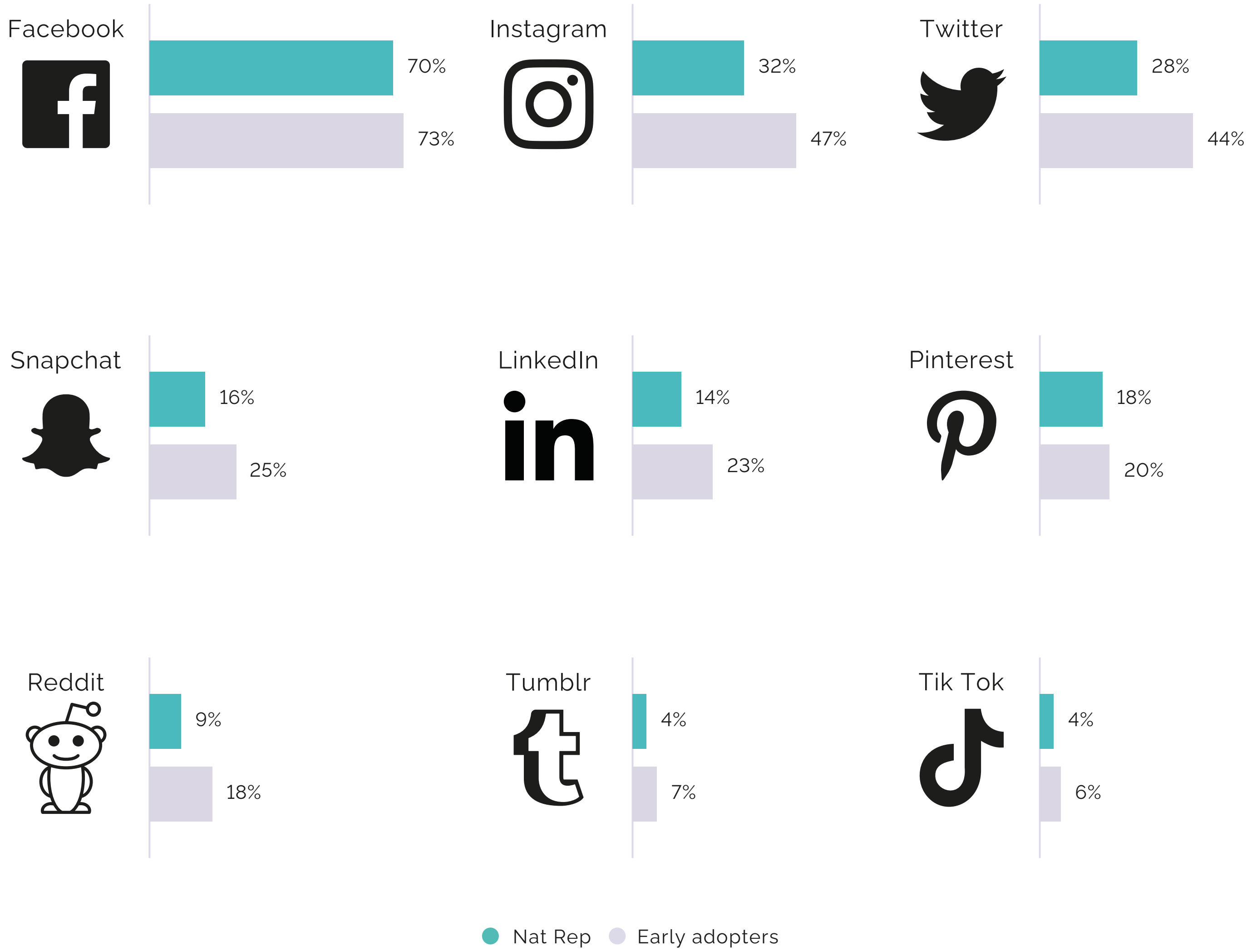


For the large group of Early Adopters who prefer online advertising, a plurality say that the social networks are the best place to catch their eye, followed by video content, with apps being the worst.

Like much of the rest of the world, the best social network to find US Early Adopters on is Facebook, which almost three quarters (73%) have used in the past month. However, it's other social platforms which they are more likely to visit when compared to the general population – in particular Instagram, Twitter, Snapchat and even Linkedin.

Social networks used in the past month

"Which, if any, of the following social networks have you used within the last month?"

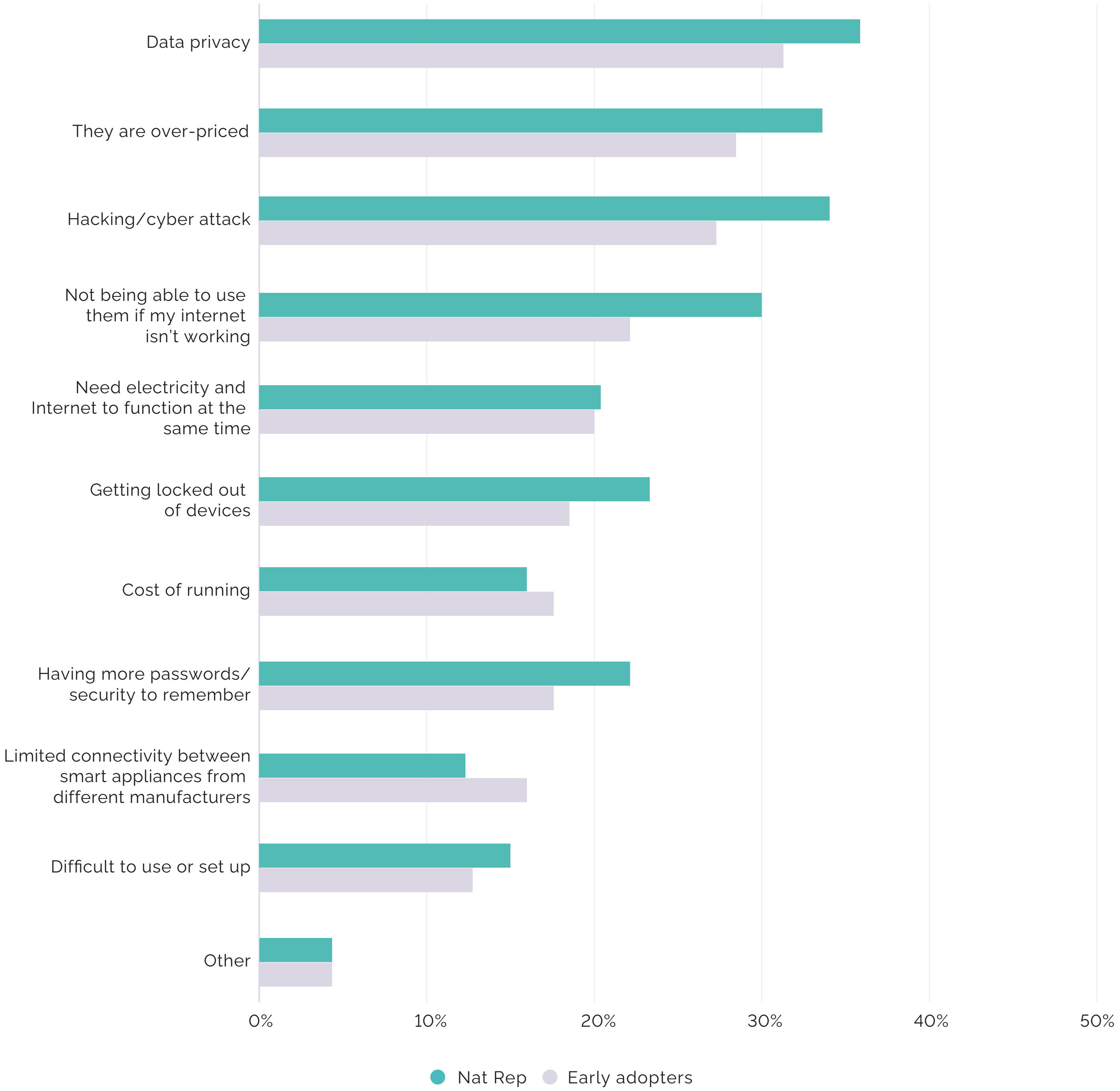


Barriers to smart home market growth in the US

We asked US consumers if they considered any of a range of issues a barrier to owning a smart appliance. The evidence suggests that early adopters – being more open to technology and having more disposable income – are less likely to register concern in every category. Nonetheless, in most categories a substantial minority of early adopters are still worried.

The most commonly noted barrier to smart appliance ownership, for example, is data privacy: cited by just under a third of early adopters (31%). The second most commonly-cited barrier relates to cost: a third (34%) of American consumers consider smart appliances overpriced compared to 28% of dedicated followers and first wavers, and both groups are about as likely to be concerned about the cost of running a smart home (16% nat rep; 17% early adopters).

US: Smart home products - Barriers to smart appliance ownership



There is also evidence to suggest that a significant proportion of Americans consider smart home technology to be inconvenient in various ways. A third of consumers (30%) and a fifth of early adopters (22%) worry that they won't be able to use their lightbulb or thermostat if their internet goes down, while 23% and 18% respectively are concerned that they'll get locked out of their devices. 22% of the US public – and almost a fifth (18%) of early adopters – are worried about having to remember more passwords. Some 15% of consumers and 13% of technophiles consider the difficulty of setting up a smart appliance to be a barrier to purchase.

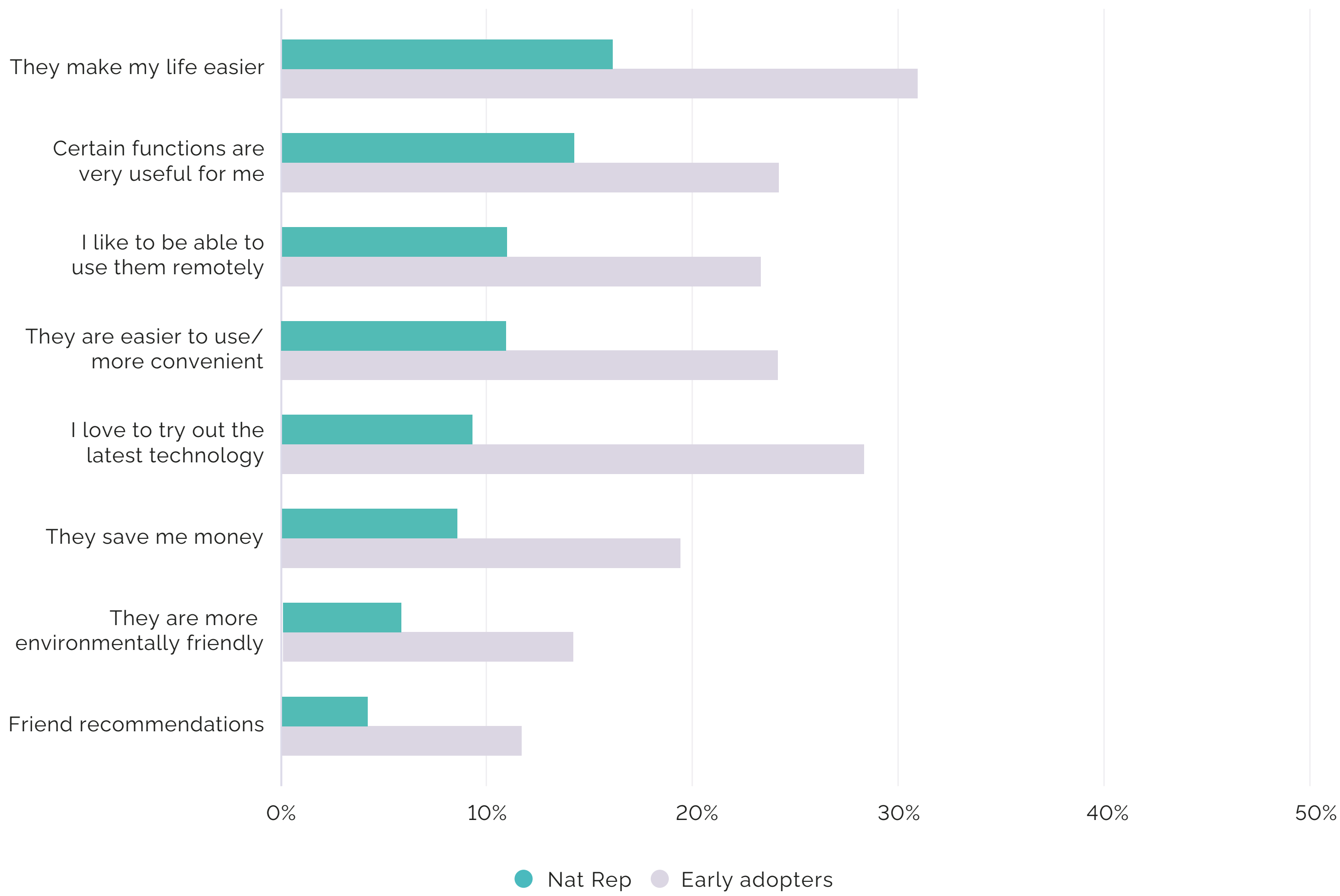
Purchasing smart appliances

What's a good reason to buy a smart appliance? Early adopters and the US public don't necessarily agree.

"They make [life] easier" is the top motivator for both groups: a third of the more technologically enthusiastic group (31%) agree compared to 16% of the general population. But early adopters are far more enthusiastic about trying out the latest technology (28% vs. 9% nat rep), the convenience of smart appliances (24% vs. 11% nat rep), remote functionality (23% vs. 11% nat rep) and individual functions (24% vs. 14%).

They're also far more likely to extol the virtues of smart technology from an environmental (14% vs. 6% nat rep) and financial (19% vs. 8%) perspective, and to take recommendations from their friends (12% vs. 4%).

US: Smart appliance purchase motivators



While it's unsurprising that early adopters are more enthusiastic about smart appliances across the board, there are a wide range of reasons behind this enthusiasm. For marketers operating in this space, it may make sense to think about whether they are communicating the benefits of smart appliances effectively enough. In an environment where some consumers are worried that a poor internet connection will lock them out of their lightbulb, thermostat or oven, they may also wonder if they are doing enough to alleviate the public's concerns.

WEARABLE TECHNOLOGY IN GREAT BRITAIN

Great Britain is home to a thriving technology scene: many consumers are accustomed to ordering meals from services such as Deliveroo; banking through app-based providers such as Starling Bank or Revolut; and playing games developed by homegrown companies such as Rockstar Games and Sports Interactive.

When it comes to wearable technology, then, consumers should in theory be open to using smartwatches, fitness trackers, and other tools and devices. But are they?

This chapter explores popular sentiment towards wearables in Great Britain – and sentiment among early adopters.

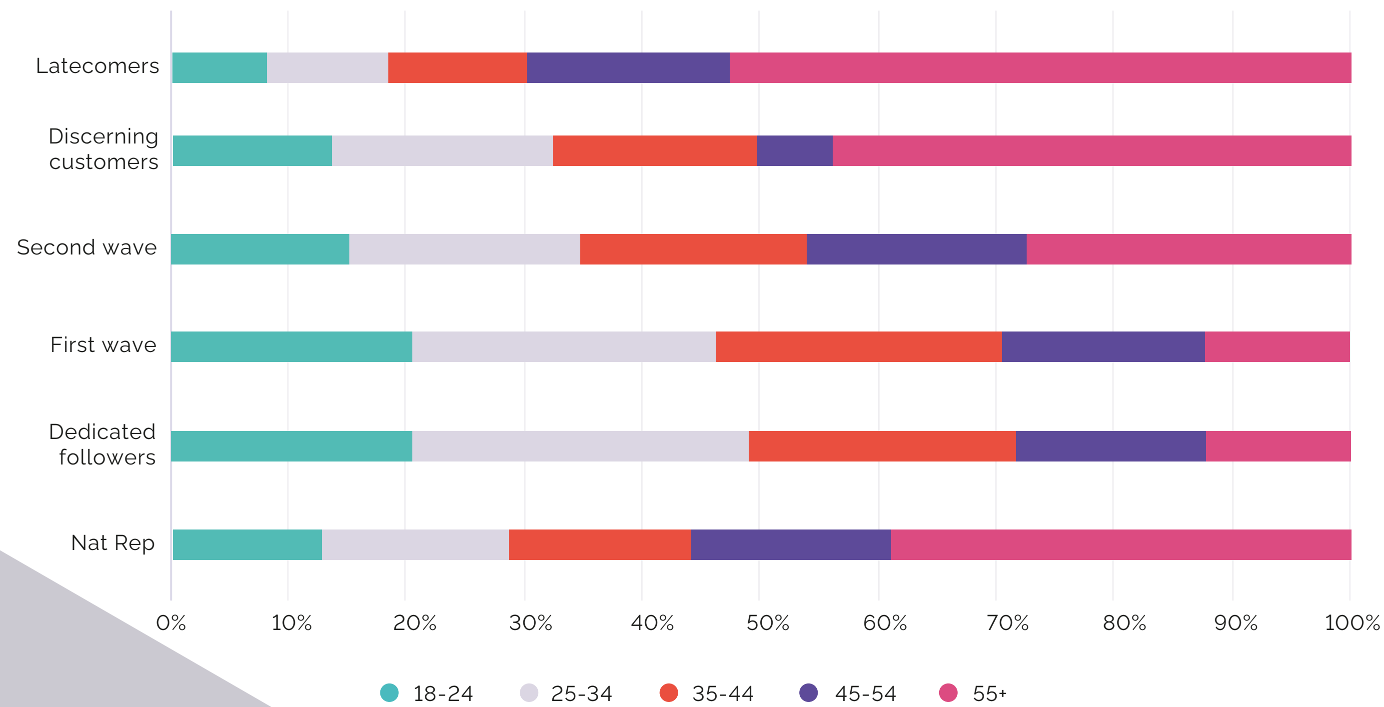
Early adopters in the British market

Early adopters make up a smaller portion of the British audience than the global average, accounting for 11% of all consumers. Just 4% are part of the most highly engaged "dedicated followers" grouping.

More notably, almost half of all consumers (49%) are latecomers: they only buy a new technology product when their old one needs replacing.

This suggests that, while Great Britain is a valuable market for wearables, it may also be more sluggish in terms of consumer adoption. Second wavers (19%) and discerning customers (21%) each amount to around a fifth of the market apiece.

GB: Technology by age



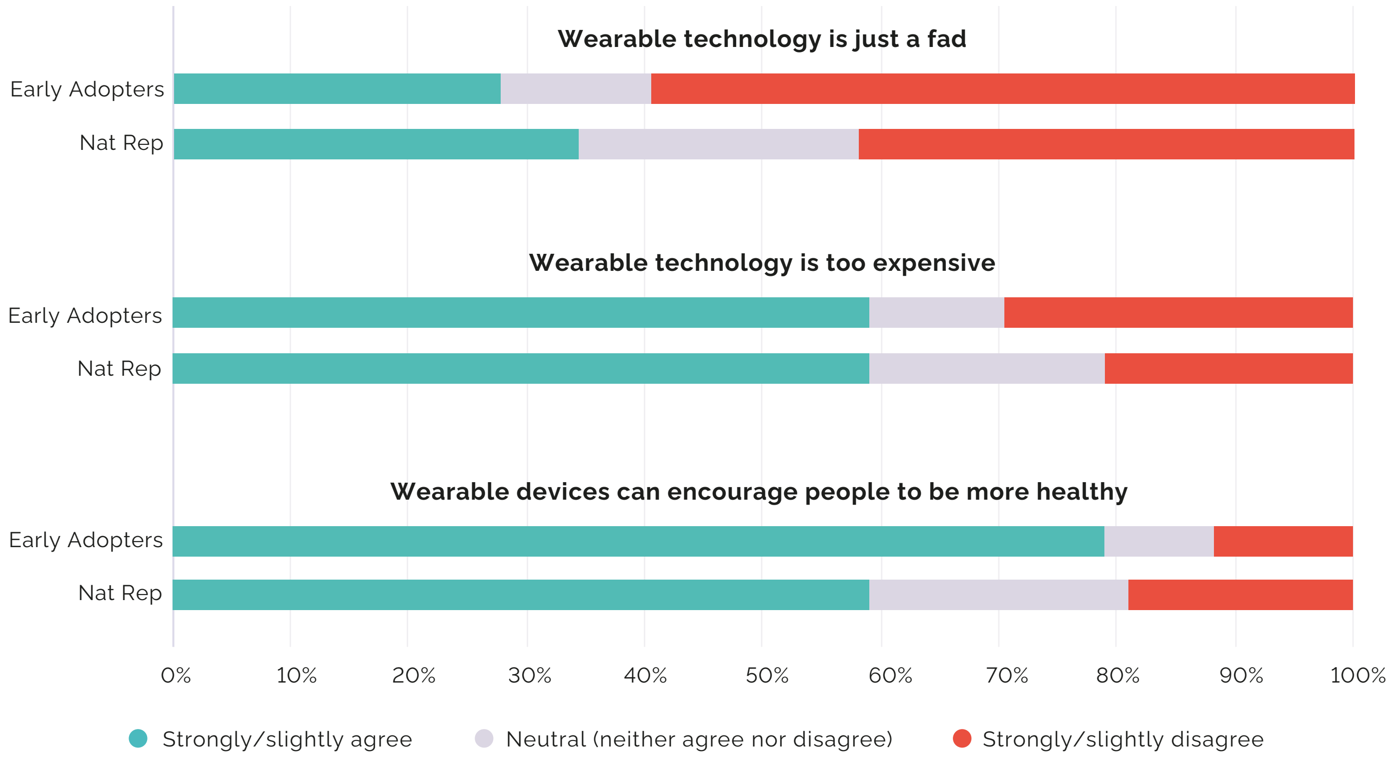
The age breakdown is broadly similar to the US: dedicated followers are disproportionately younger; latecomers are disproportionately older. Along gender lines, men represent seven in ten (73% vs. 27% of women) dedicated followers and two-thirds of first-wavers (66% vs. 34% of women). Over a quarter (26% DF; 27% first wave) of British early adopters have between £250 - £750 a month in disposable income – a slightly higher proportion than the national average (22%). In terms of overall attitudes, they're also more likely to believe that robots and AI can be helpful to humanity, and more open to trying the latest technology products.

What British consumers think of wearables

When it comes to wearables, our data shows some similarities but also some clear differences between the general British public and early adopters.

On some issues, these groups are relatively aligned: for example, they are equally as likely to agree with the statement that the technology is too expensive (59%) – though technophiles are more likely to disagree with the statement (30% vs. 21% nat rep). Early adopters are also only slightly less likely to agree that wearables are a fad (28% vs. 35%), but again, they are substantially more likely to disagree with the statement.

GB: Consumer and early adopter attitudes towards wearables



The health benefits of wearables are a key point of divergence. While a majority agree with the statement that "wearables can encourage people to be more healthy", early adopters are more likely to endorse this idea by twenty percentage points (80% EA; 60% nat rep).

Many businesses marketing wearables in the UK already concentrate on the health-enabling aspects of these devices and, for early adopters, it seems that the message is getting through.

DIGITAL ASSISTANTS IN GERMANY

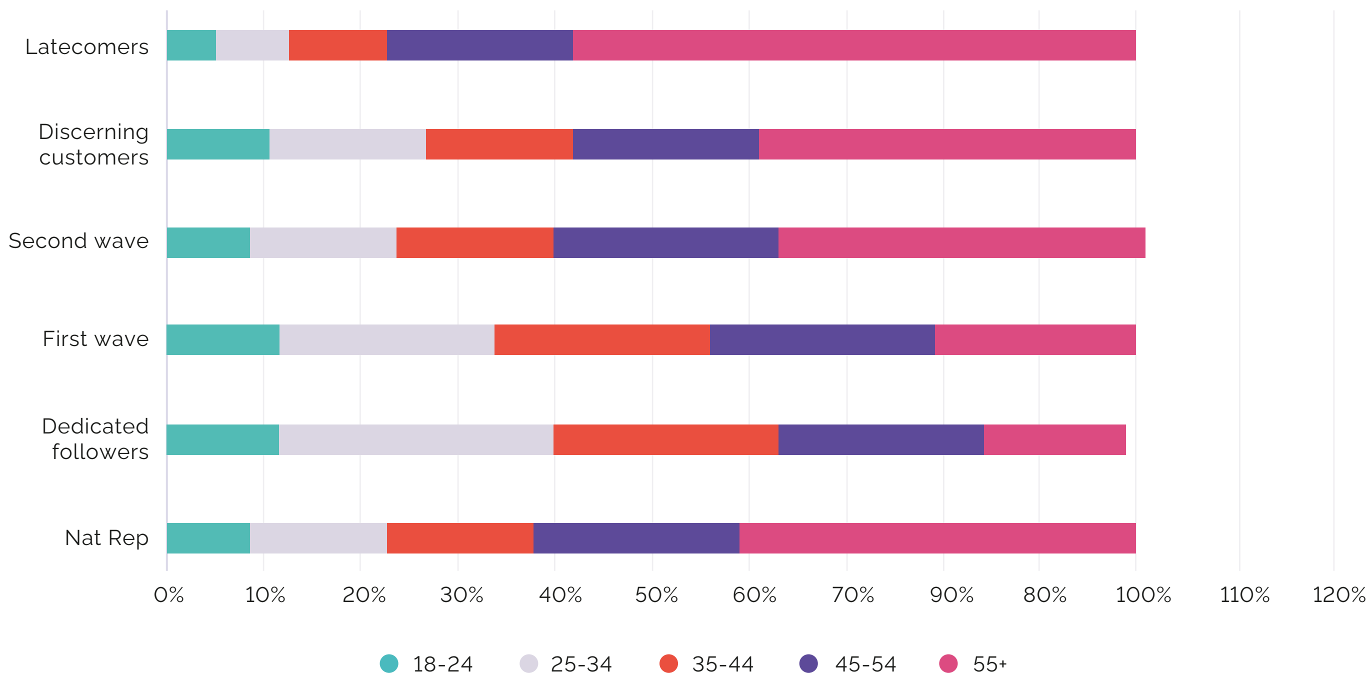
As the most populous country in the EU – and one with a thriving technology scene, particularly in cities such as Berlin – Germany presents real commercial opportunities for businesses. But as lucrative a market as it may be, Germany also has certain disadvantages for marketers.

This chapter explores some of these advantages and disadvantages by examining popular sentiments towards digital assistant technology: an innovation variously considered revolutionary, convenient, and dangerous, depending on who is asked.

Early adopters in the German market

German consumers are equally as likely to be latecomers compared to the global average (35%) but they are less likely to be early adopters: just 4% fit into the dedicated follower grouping, while 10% are part of the first wave. Three in ten (29%) are part of the second wave – the group who get new technology products "once they've been out for a while" – while a fifth (22%) are discerning customers who only buy technology products when they "really like them".

Germany: Technology adoption by age



Demographically speaking, early adopters are – as they are in other markets – more likely to be male than female. The proportions are exactly the same as they are in Britain: 71% of dedicated followers are men compared to 29% who are women; 67% of the first wave are men compared to 33% who are women.

As in other markets, early adopters are also younger: two in five (40%) dedicated followers are aged 18-34, as are a third of the first wave (34%). But they're not as likely to be young as they are in other markets: while over-55s account for 12% of dedicated followers in the US and GB, this increases to 15% in Germany. It's a similar story with the first wave: where 16% of dedicated followers in America and 13% in GB are older than 55, they account for 21% of Germans.

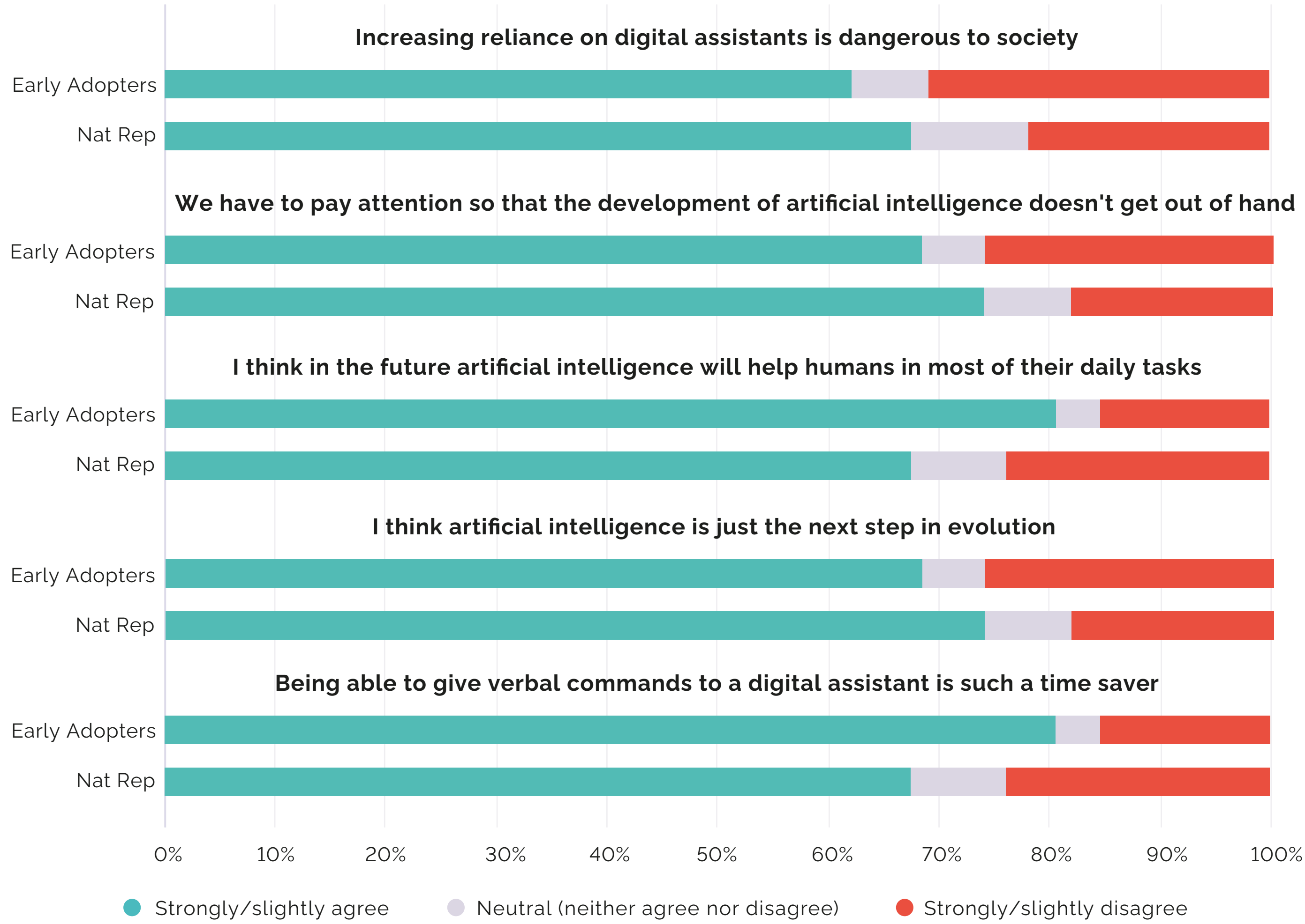
The German technology market therefore skews older than the technology market in other nations. And this may well have commercial implications for companies that intend to market digital assistants in this nation.

Attitudes towards digital assistants in Germany

Examining German sentiment towards digital assistants among both early adopters and consumers in general reveals a degree of trepidation.

Almost seven in ten consumers (68%), for example, believe that an increasing reliance on digital assistants is dangerous to society. But more than six in ten (62%) early adopters say the same.

Germany: Consumer and early adopter attitudes towards digital assistants



There's a similar level of caution around artificial intelligence. Though both groups believe AI can be helpful, a significant majority of both consumers and technophiles think we should pay attention so that the development of this technology doesn't get "out of hand".

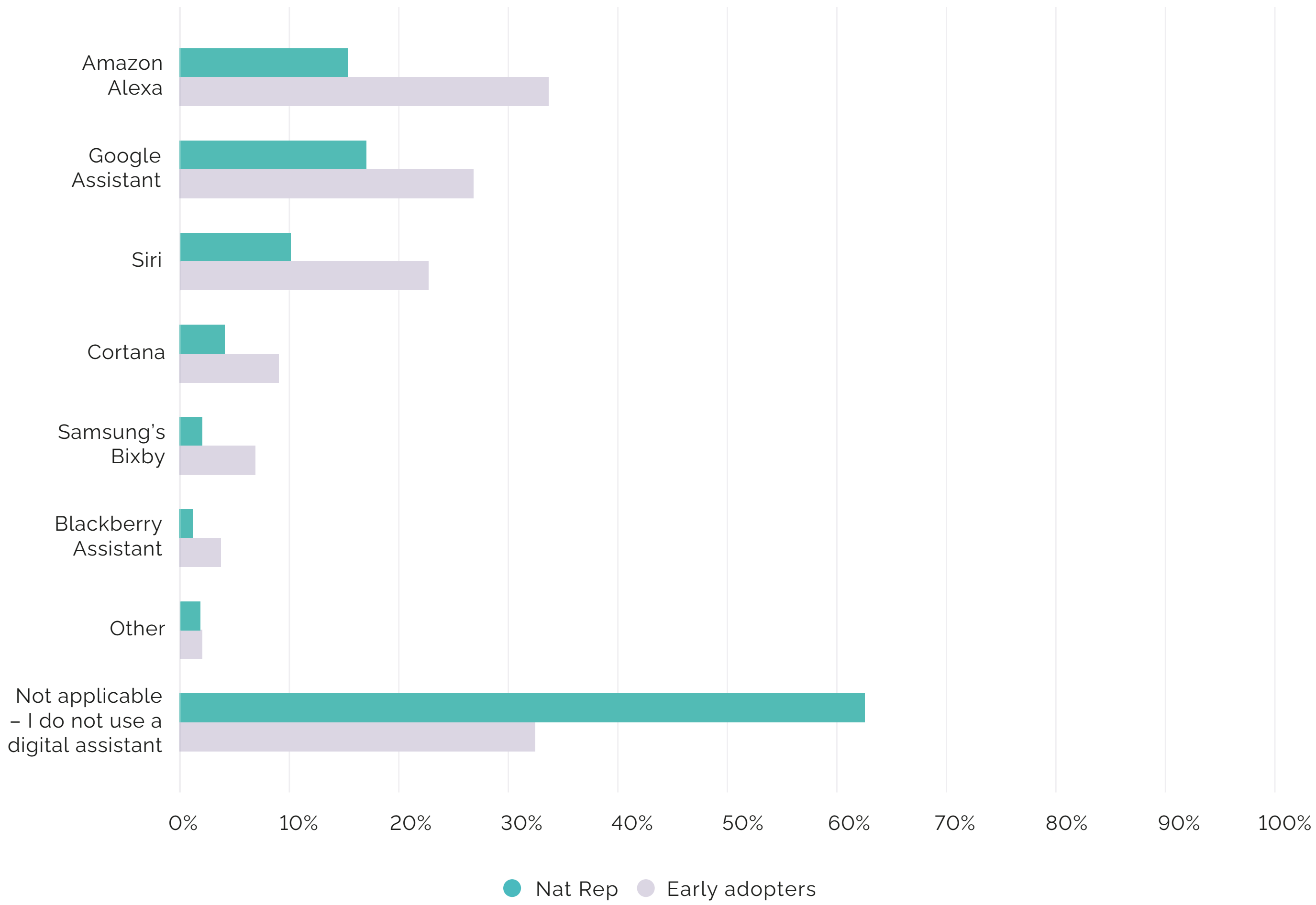
The widest gap between early adopters and the German public relates to voice commands: while seven in ten (72%) of the former think they help save time, less than half (47%) of the latter think the same.

Most German consumers do not use digital assistants at all (62%); the same can be said of a third (32%) of early adopters.

Amazon's Alexa is the most popular digital assistant among the most engaged consumers, with a third of early adopters (33%) saying they currently use it. Among the wider consumer group, though, it is an almost dead heat between Alexa and Google Assistant (15% Alexa; 16% Google Assistant).

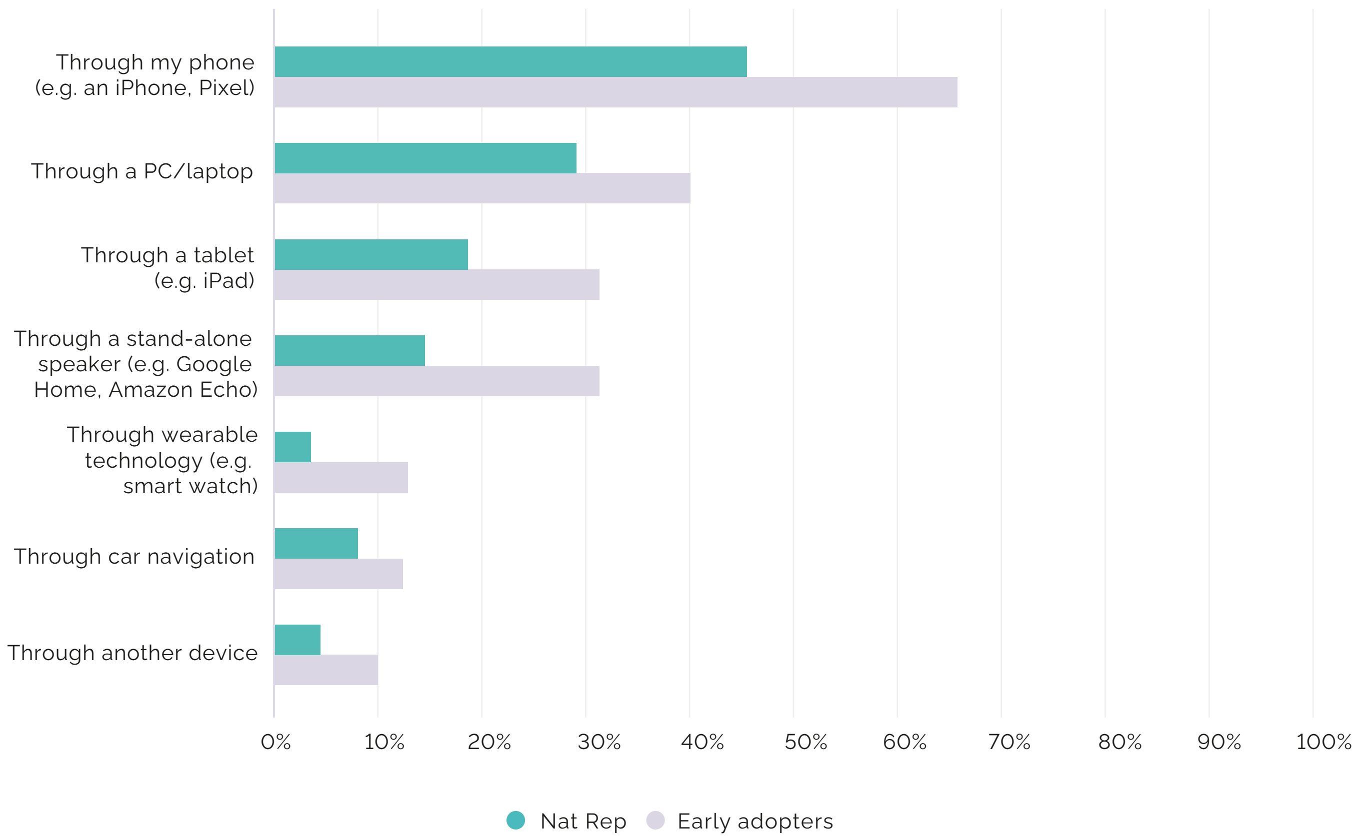
Google Assistant comes in second place for early adopters, with 27% saying they use it, while Siri (22%) finishes third – as it does for German consumers overall (11%).

Germany: Digital assistant uptake among consumers and early adopters



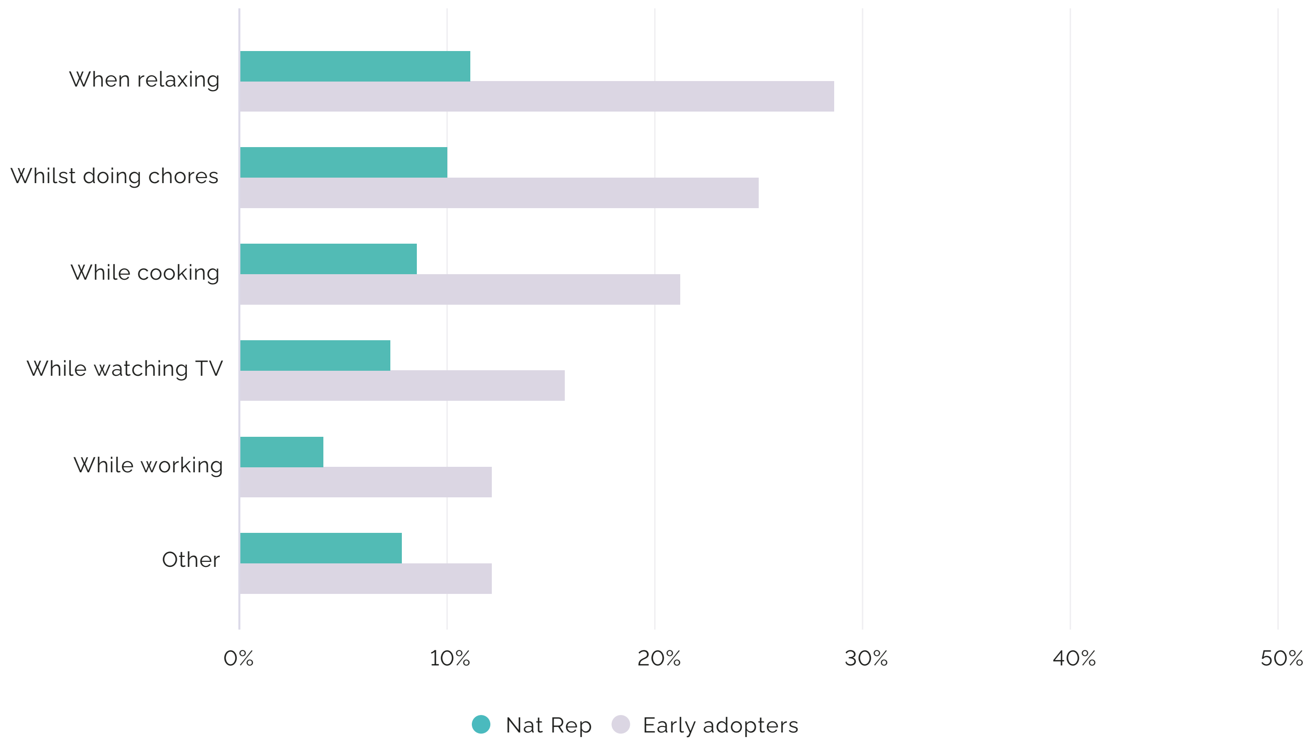
A smartphone such as an Apple iPhone or Google Pixel is the most popular way to access digital assistants for both early adopters and the wider German public – favoured by two-thirds of technophiles (66%) and 45% of the wider country. PCs/laptops (40% early adopters; 29% nat rep) are a distant second, while tablets are an even more remote third (31% early adopters; 19% nat rep) – tying with stand-alone speakers such as Google Home or the Amazon Echo among early adopters (31%).

Germany: Devices used for accessing a digital assistant



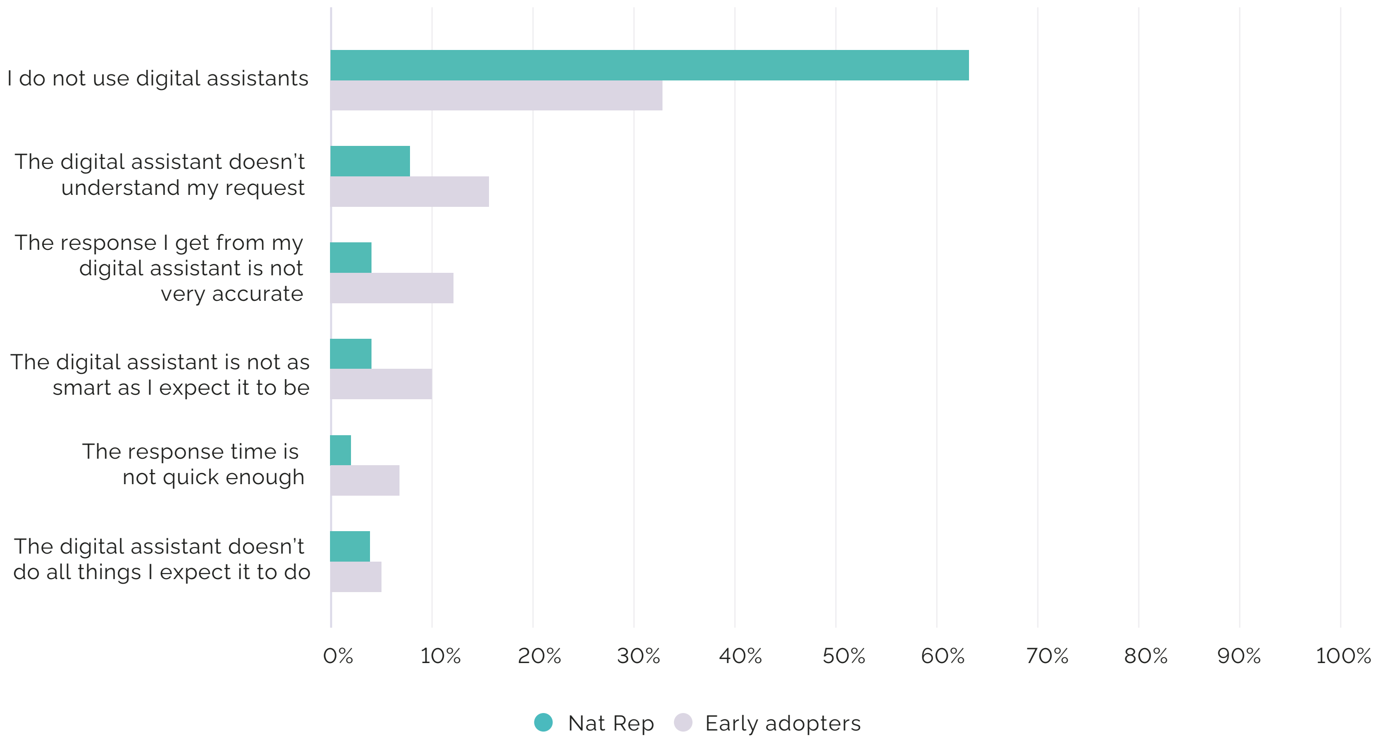
As for when they prefer to use digital assistants, a plurality of German consumers – and a majority of early adopters – say they access their chosen assistant while watching TV.

Germany: When do consumers and early adopters use digital assistants?



When asked about the main barriers to using digital assistants, Germans are most likely to say that the technology does not understand its requests – a complaint cited by 15% of early adopters and 8% of the wider public. A further 12% of technophiles and 4% of consumers say they do not get accurate responses to their queries, while 10% of the former and 4% of the latter say their assistant simply is not as smart as they expected.

Germany: Challenges faced while using a digital assistant



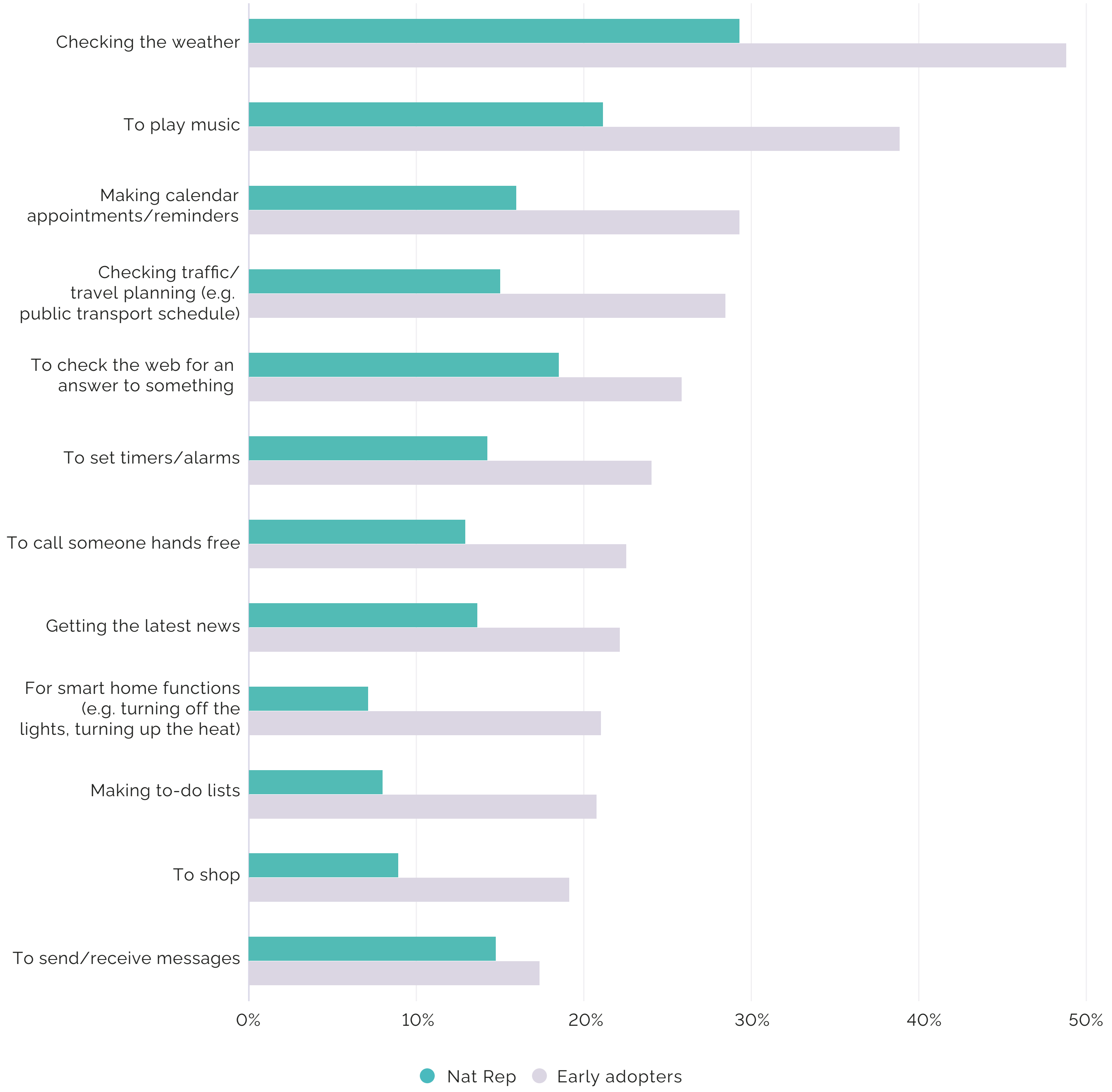
Among early adopters, half (48%) say they use their digital assistant every day compared to a quarter (24%) of the wider public. While the more engaged group may be more likely to use this technology on a regular basis, it is worth asking why there is not more uptake among the German public.

Germans who do use digital assistants use them in several distinct ways.

This technology may well have a range of futuristic or forward-looking applications, but at present, consumer motivations are more prosaic.

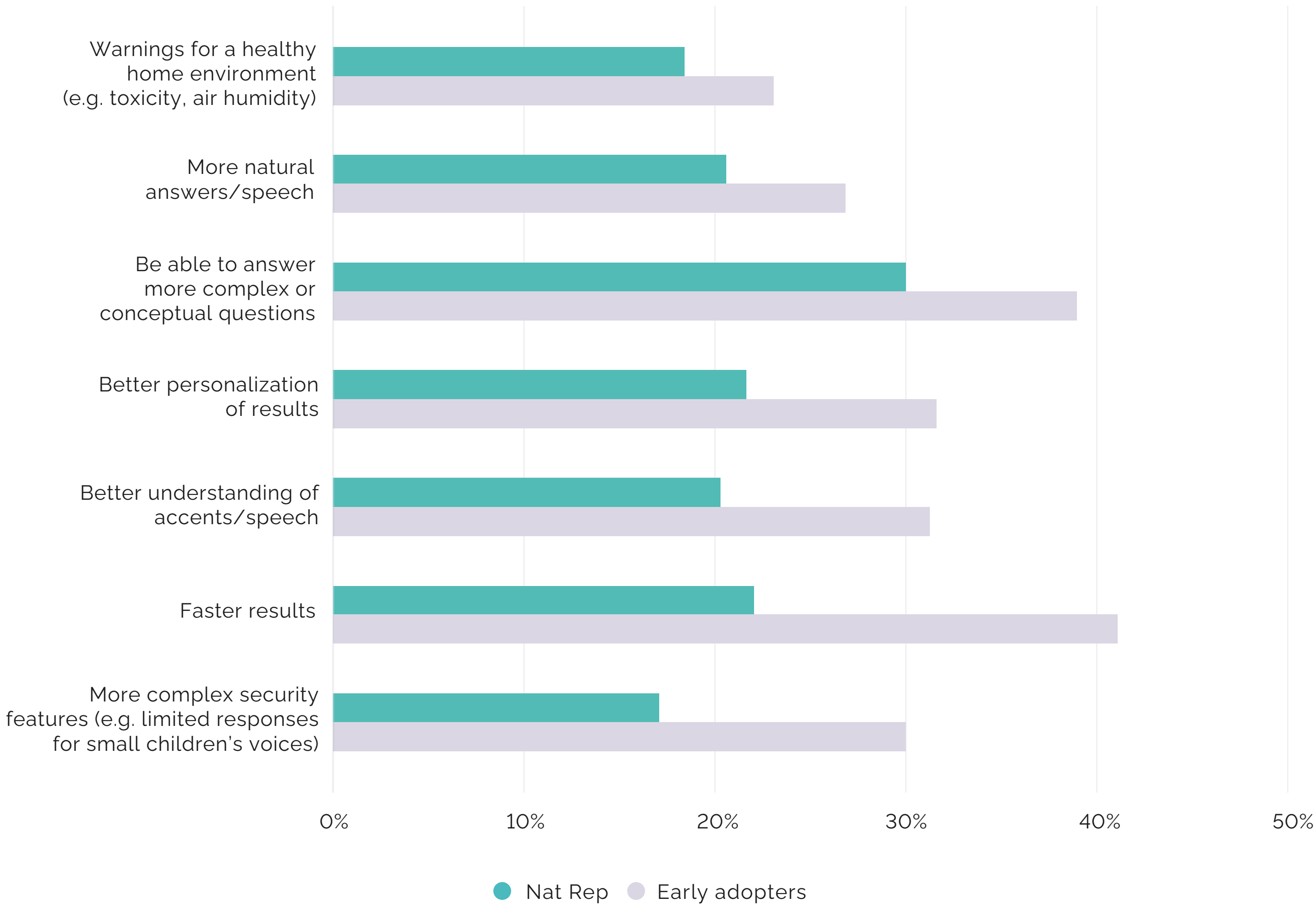
Checking the weather is the most popular function among both early adopters (48%) and the wider public (29%), while playing music (38% EA; 21% nat rep) is the second most-cited function. Making calendar appointments ranks third among our technophiles and consumers alike (28% EA; 16% nat rep) with checking traffic coming in third among the former group (28% EA; 15% nat rep).

How are Germans using digital assistants?



But if Germans are thinking of digital assistants in largely practical terms, they are more ambitious about the future applications of this technology. Four in ten early adopters want the Alexa, Google Home and Siri assistants of the future to offer speedier performance (41%) and be able to answer more complex or conceptual questions (39%), while three in ten expect them to provide more personalized results (32%), better accent recognition (32%), more complicated administrative capability (31%) and more complex security features (30%).

Germany: Future applications of digital assistant technology



The German public are less likely to list these applications in every category we asked about.

There is nonetheless opportunity here for businesses and marketers. Our data shows that, in Germany, advances in areas such as personalization, speech recognition, security and logic will resonate with a substantial group of both early adopters and the general public.

5G IN FRANCE

In September 2020, President Emmanuel Macron delivered a rebuke to members of France's anti-5G movement – deriding them as "Amish" technophobes who wanted to return to the days of oil lamps. Describing France as a country of "light" and "innovation", he declared that the nation would adopt the next-generation network technology with certainty.

But how do the French feel about 5G?
This chapter explores attitudes towards the new network technology in France among the country's consumers and early adopters.

Early adopters in the French market

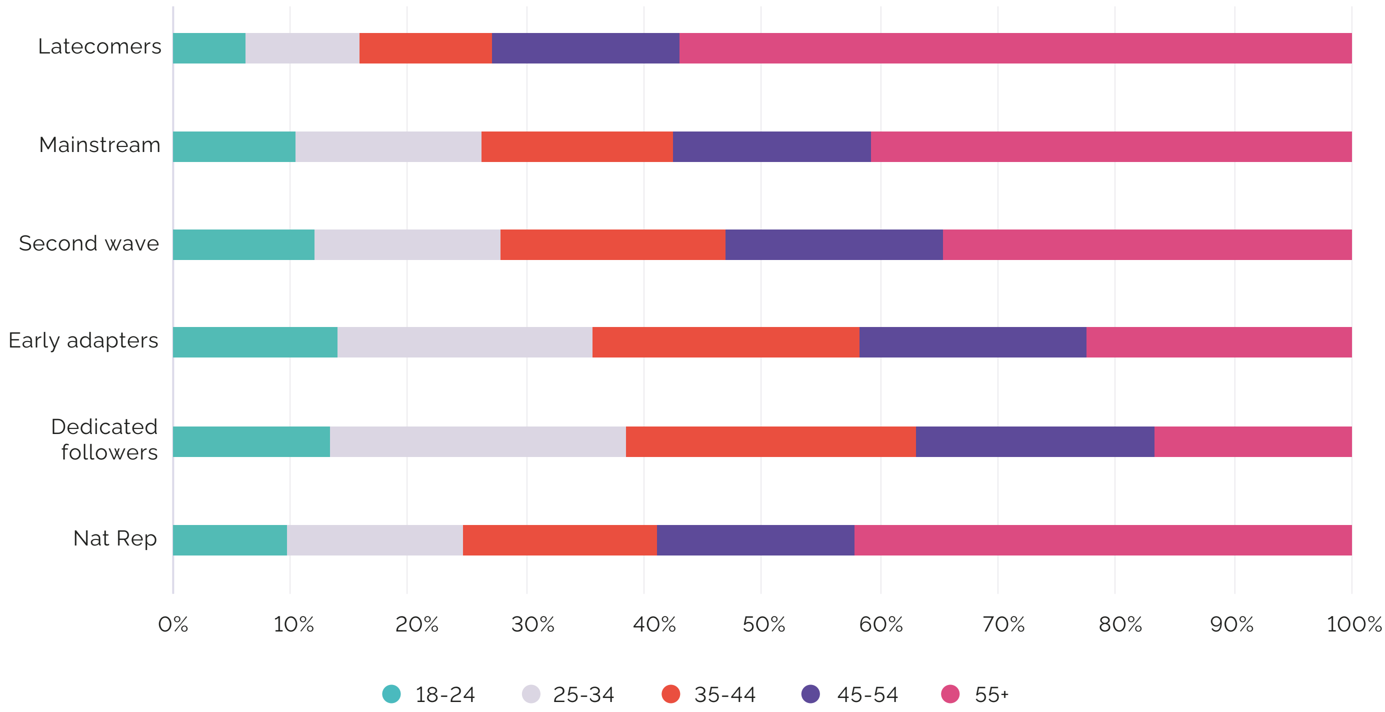
Our study did not ask the French public if they were keen on the return of oil lamps.

But the evidence does suggest that they are broadly in line with the global average in terms of their attitudes towards technology adoption. A fifth (19%) are early adopters compared to 18% of international consumers – with 7% being dedicated followers and 11% being first-wavers.

Second-wavers amount to 18% of the French public, while discerning customers make up a quarter (26%). Latecomers amount to 37% of France's consumers compared to 35% across all markets in our study.

The data also suggests that early adopters are spread across a wider age and gender range. A third of dedicated followers (33%) are women (with 67% being men), while two-fifths of first wavers (39%) are female compared to 61% of men. It is not nearly parity, but – with the exception of Indonesia – it is closer to parity than it is in other markets.

France: Technology adoption by age

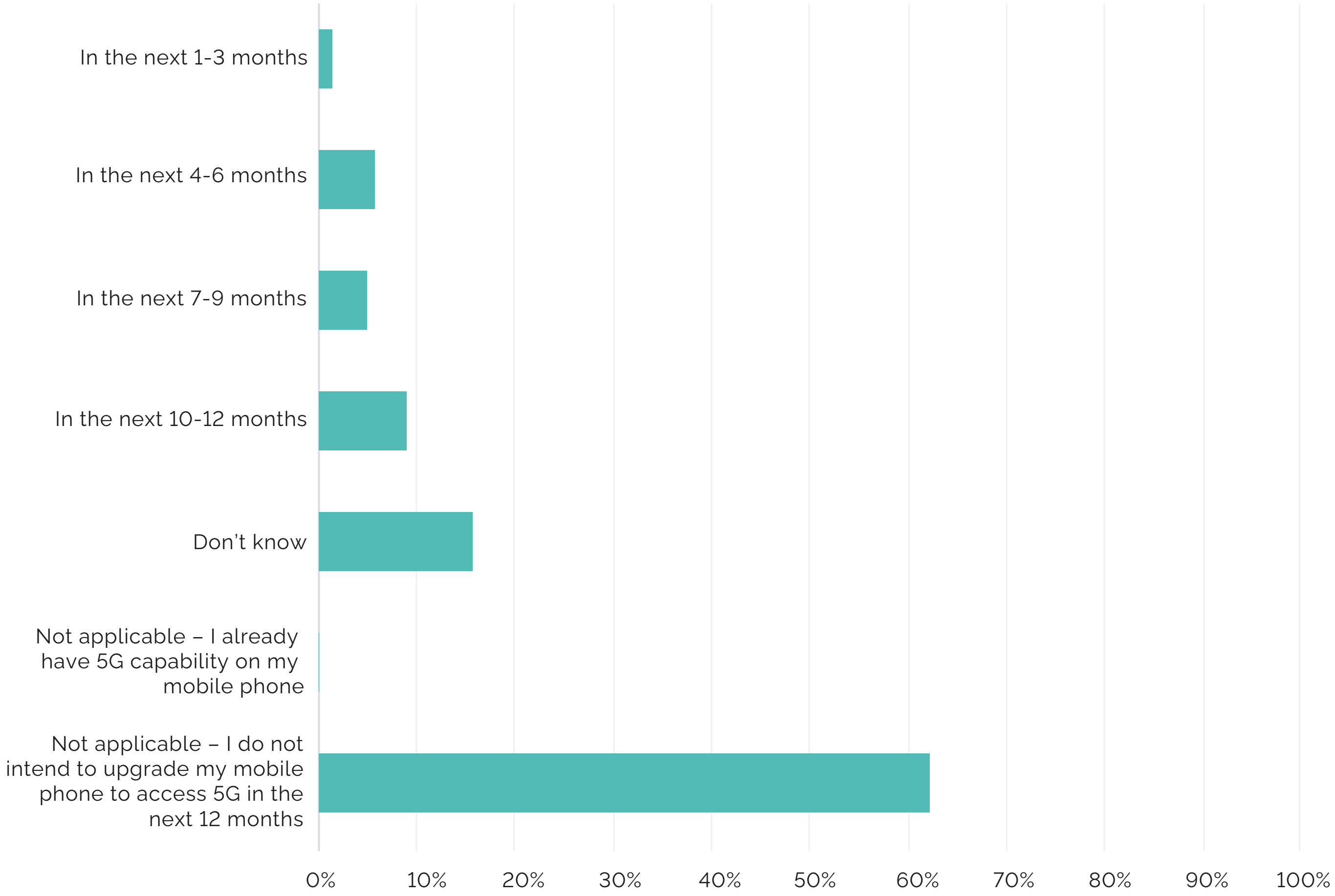


In terms of seniority, France is the only one of our six key markets where the younger, 18-34 age brackets do not make up a plurality of early adopters. While 38% of 18-34s fit into the dedicated follower category, 45% of this group are aged 35-54. It is a similar story with the "first wave" consumers: 36% are aged 18-34 while 42% are aged 35-54.

Intentions to upgrade to 5G in the next year

Our data indicates that two thirds (65%) of French consumers do not intend to upgrade to 5G in the next 12 months. Just 22% say they intend to upgrade in the next year.

France: Consumer intention to access 5G in the next 12 months



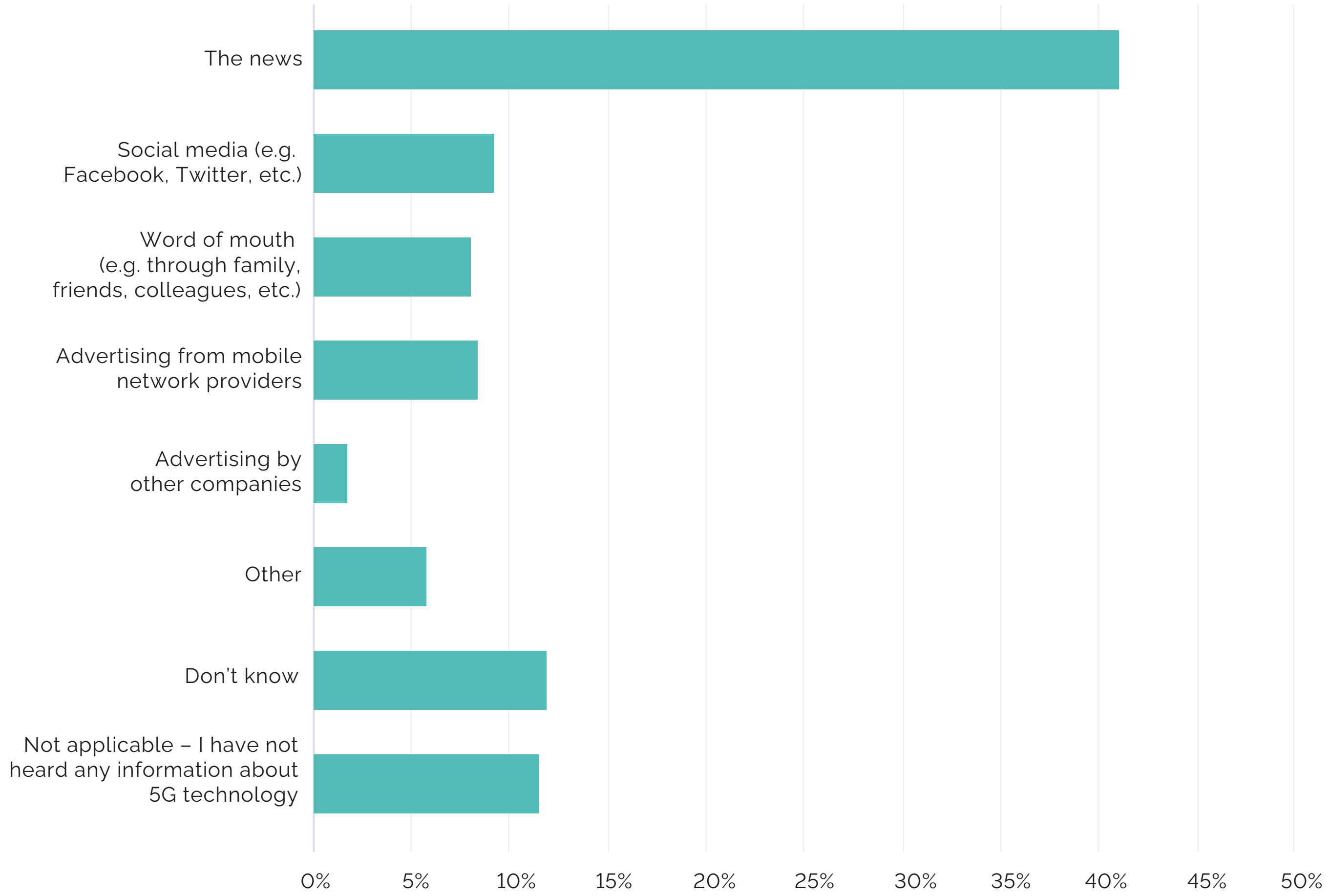
In fact, French consumers are more likely to say they "don't know" if they're going to upgrade to 5G in the next year or not than they are to definitively state that they intend to upgrade. This should not be overly alarming to 5G providers: as our GB data has shown in the past, the benefits of next generation network technology are not always immediately apparent to consumers. But it does suggest that more could be done to communicate those benefits.

Information about 5G

If 5G has attracted the attention of President Macron, it has eluded a chunk of the French public; when asked, 12% say they have not heard any information about the new network technology at all, and the same proportion (12%) say they do not know.

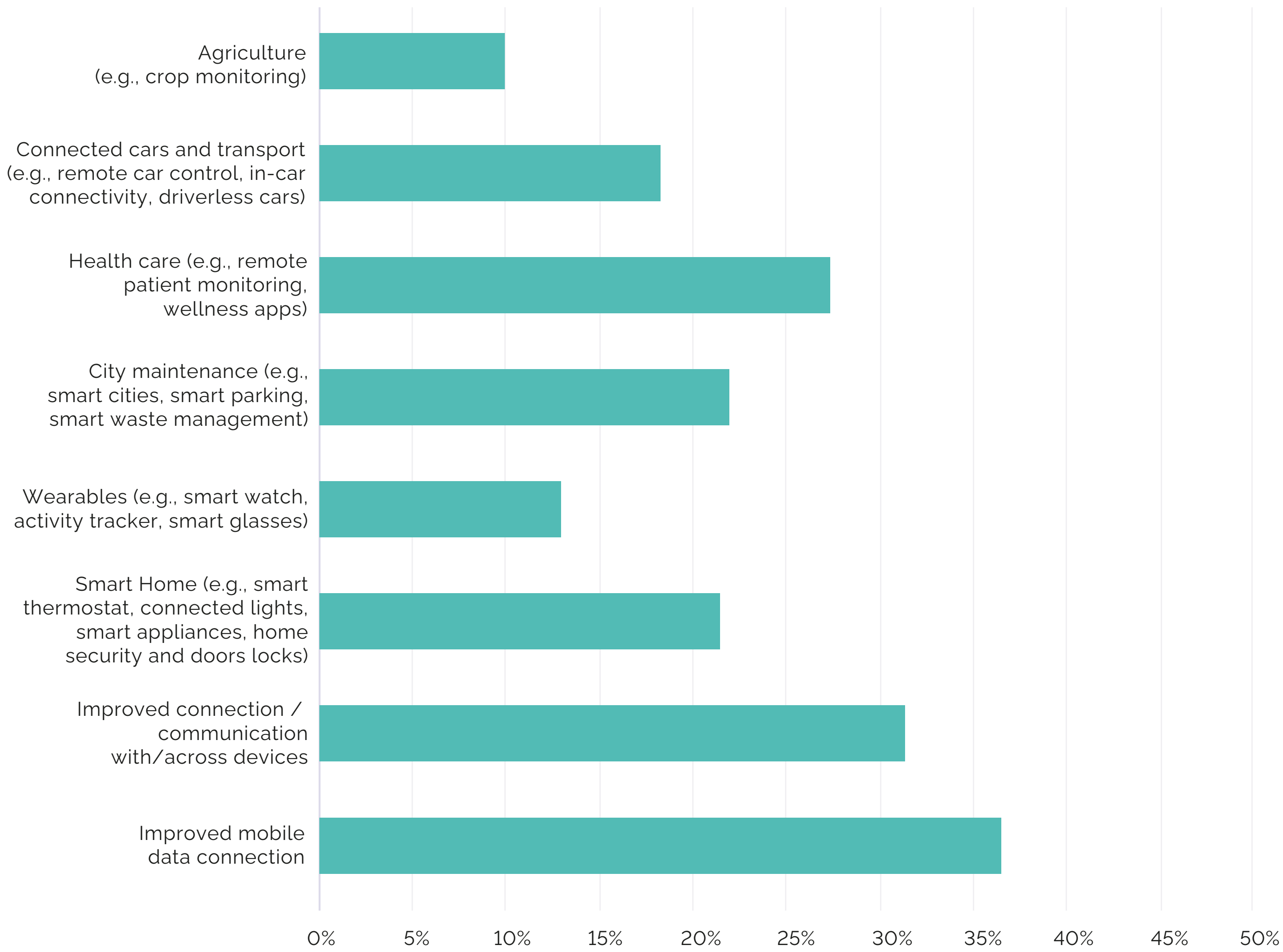
Two in five (41%) cite the news as a major source of information about 5G, while one in ten claim to have heard about it through friends and family (9%) or social media (9%).

How French people learn about 5G



Improved connectivity accounts for the top two "key uses" of 5G, according to more than three in ten French consumers. Overall, 37% say an improved mobile data connection is a motivation to get 5G, while 31% cite improved connection/communication with all devices.

France: What are the key uses of 5G?



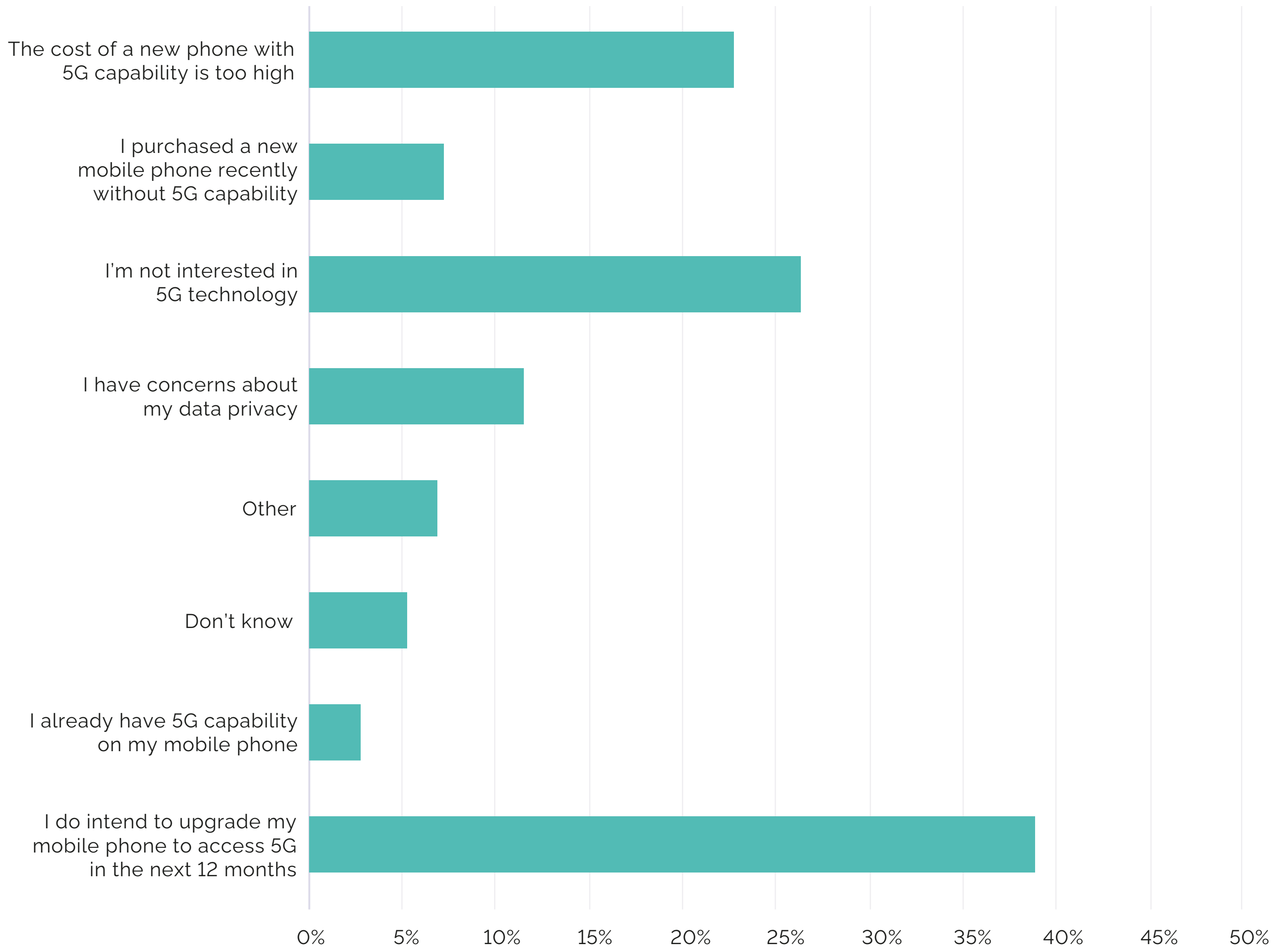
A quarter of the French public (27%) are also aware of the healthcare benefits of 5G technology. This may be a particularly salient benefit to consumers in the midst of the COVID-19 pandemic. The key uses of 5G cited by our respondents also have a degree of overlap with other technologies featured in our study such as wearables and smart home technology. 5G could therefore be a potentially valuable marketing tool for companies promoting these products and services.

5G technology in France: Barriers and motivators

Our data suggests that the main barriers to 5G adoption are a lack of interest (26%) and the sheer cost of phones equipped with the new technology (23%). Where the latter reason is concerned, a related, but less common motivation is simply that the consumer recently bought a phone without 5G capability. The good news for providers is that these particular barriers should become less problematic as 4G is phased out and 5G becomes more common.

Other barriers, though, may be more concerning. Some 11%, for example, cite concerns around data privacy, while 7% say "Other" – which could encompass anti-5G conspiracy theories and ecological considerations, among other things. For businesses hoping to promote this technology or capitalize on it, alleviating these concerns should be a priority.

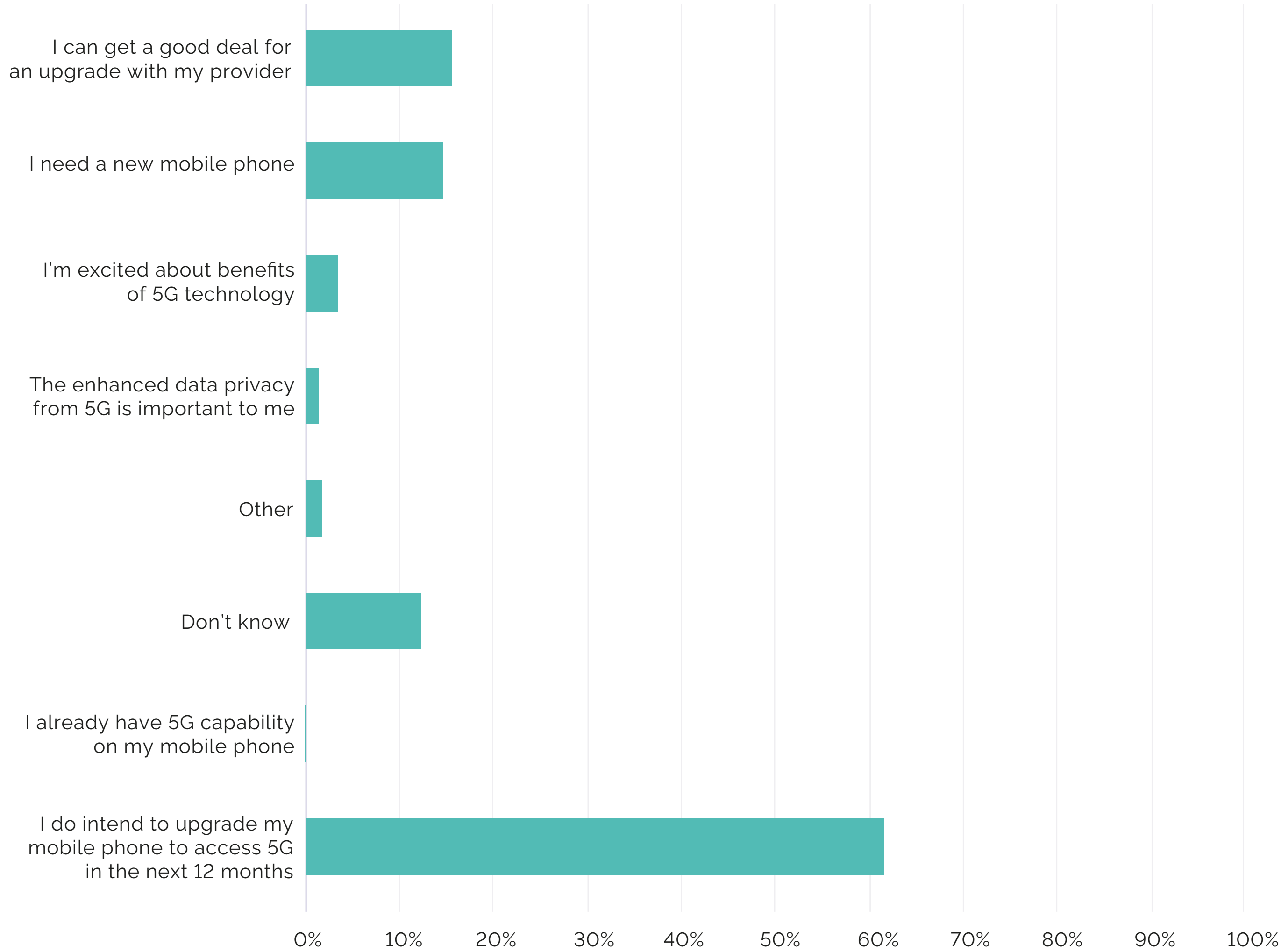
France: Barriers to 5G adoption



In terms of motivations, 14% say they can get a good deal for an upgrade with their provider, while 13% simply need a new mobile phone. Just 3% say they are excited about 5G technology and its attendant features and benefits.

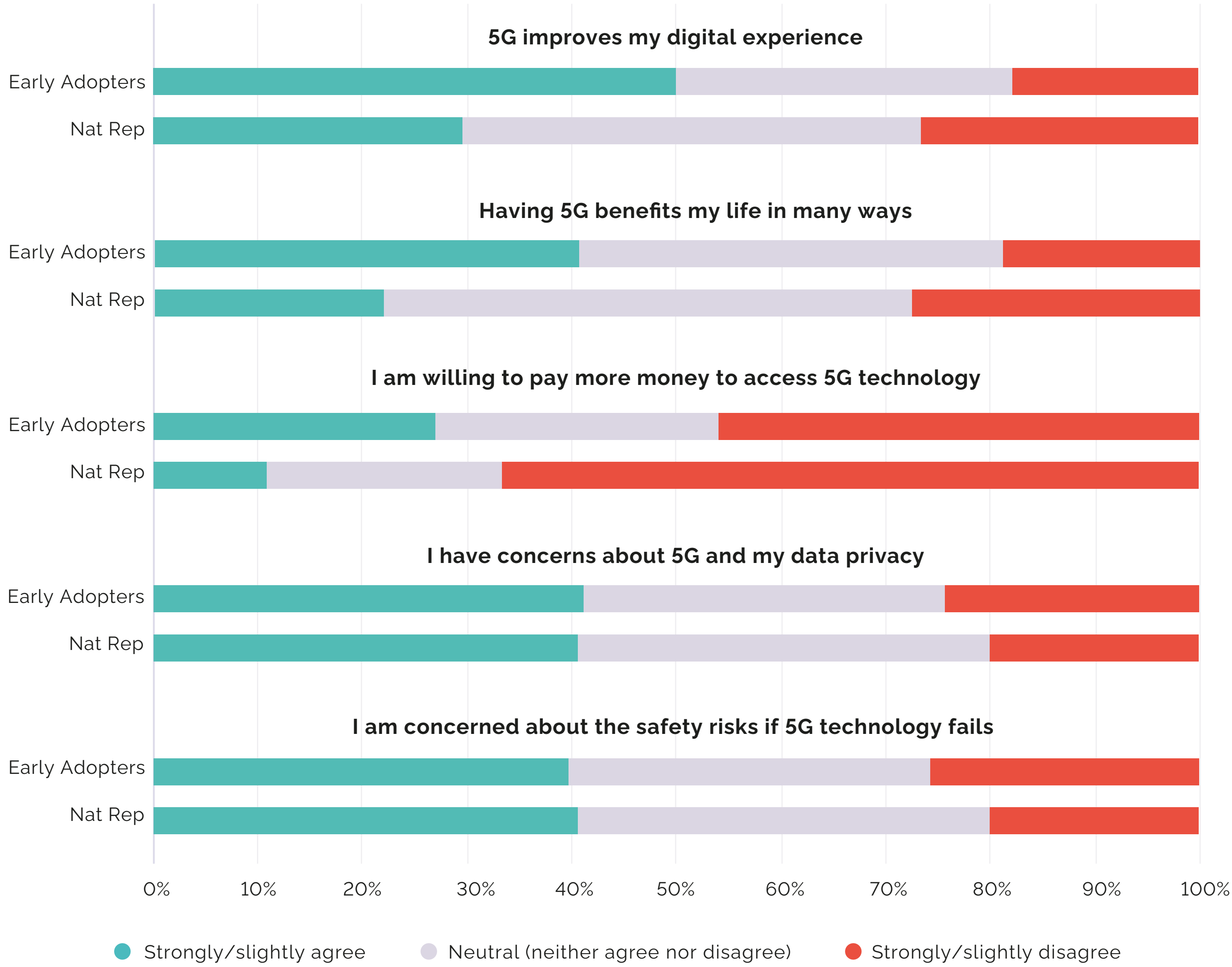
This suggests that these features and benefits could be better articulated by marketing and PR teams – particularly since 11% of the French public say they "don't know" any motivations to get 5G at all.

France: Motivations for 5G adoption



Early adopters are more keen on 5G technology than the French public: half (50%) believe it can improve their digital experience compared to three in ten (30%) of the wider consumer group, while two in five (41%) say it benefits their lives in many ways compared to just a fifth (22%) of the public.

France: Consumer and early adopter attitudes towards 5G technology



But there is evidence to suggest that certain concerns about 5G are cutting through even among highly engaged consumers. Four in ten early adopters (42%) and general consumers (41%) say they have worries about data privacy, and the same proportion say they worry about the safety risks if it fails.

With this in mind, network providers – and companies whose products use 5G – may wish to emphasize reassuring consumers about these concerns as much as promoting the technology's virtues.

THE TECHNOLOGY MARKET IN INDIA

With a population of 1.3 billion people, a growing digital ecosystem, and uncommonly digital-savvy consumers, India is a key market for many global technology companies.

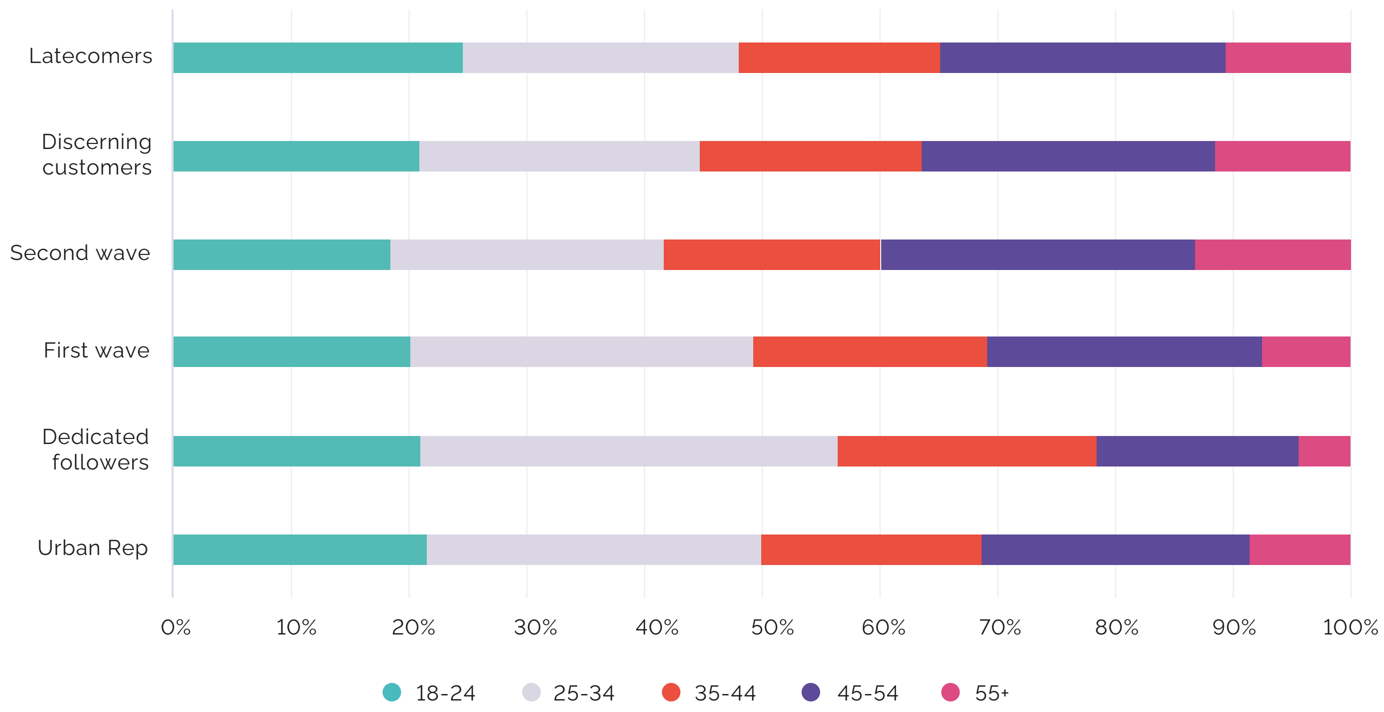
Corporations such as Apple are investing vast resources to drive up adoption in this market over the short and long term. The company is set to open its first India store in 2021, and CEO Tim Cook has gone on record saying that he intends the business to operate in the country for "a thousand years".

This chapter has a more immediate focus and, given India's greater enthusiasm for technology, will take a wider approach rather than highlighting a specific category of products and services.

Early adopters in the Indian market

As mentioned previously, our data shows that India's consumers are substantially more likely to be early adopters of technology – although that's partially because our sample in the country is an urban one. What's more, a plurality (30%) are among the most highly engaged group – the "dedicated followers" – with the first wave consumers accounting for another fifth (19%). Latecomers account for just 15% of the online population. The second wave make up 17% of the Indian populace while discerning customers make up another 20%.

India: Technology adoption by age



Breaking down early adopters by age suggests that they overindex on the 18-34 demographic to a greater extent than many of the other markets in our study. Half of dedicated followers (56%) and first-wavers (49%) fit into these groups.

Disposable income may therefore be a better way to differentiate these groups: a third of early adopters (34% DF, 35% FW) have between 10,001 – 50,000 rupees per month to spend on themselves, compared to 28% of the general population) and just 16% of latecomers.

India's attitudes to technology

In terms of overall attitudes, the early adopter group deviates from the public in some important areas – though in other areas, it's more consistent. This is largely due to internal divisions between the two constituent groups.

Dedicated followers, for example, are most likely to take the opinions of celebrities and influencers into account when making a purchase (32% vs. 16% online rep), and to say that brands must connect with customers in real life in order to be successful (64% vs. 55%). First wave consumers tend to hew more closely to the national average.

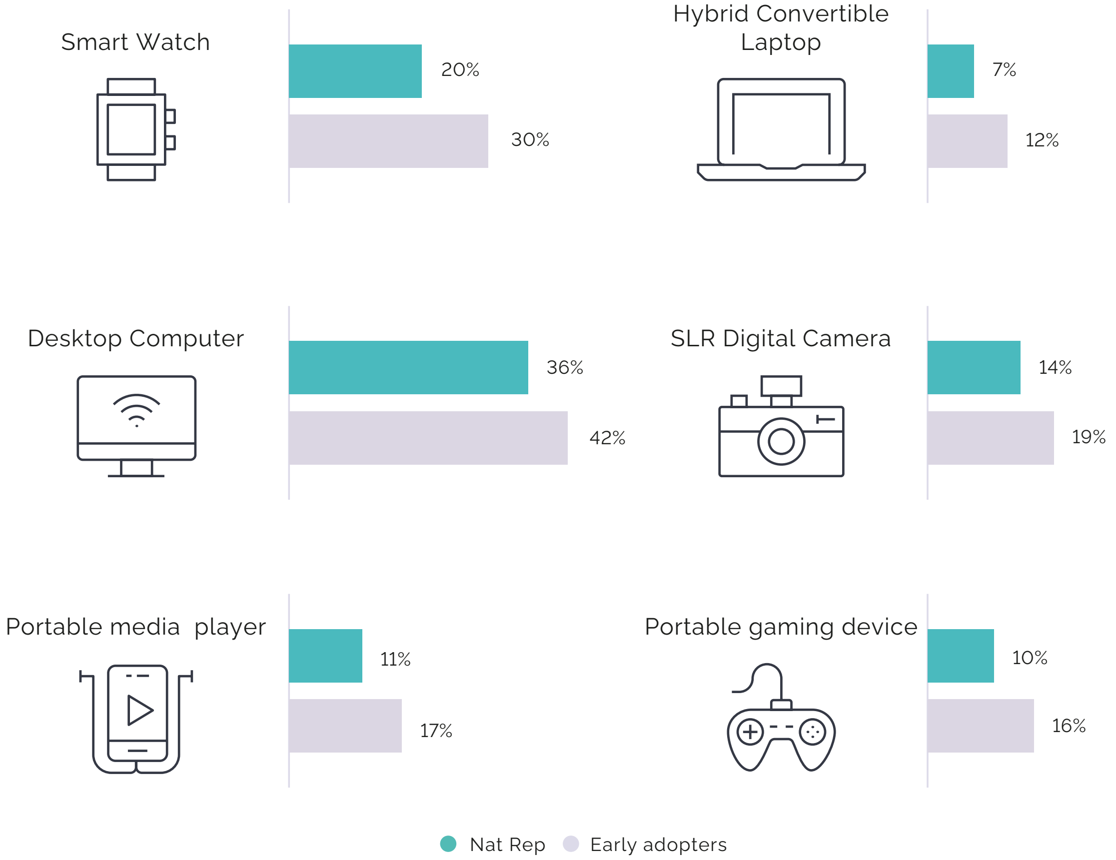
That said, the dedicated follower group is significantly larger in India (accounting for twice the proportion of early adopters – 18% - across the globe) than it is in many markets – so emphasizing the preferences of the most engaged consumers may be as important as winning less engaged consumers over.

India: Attitudes towards technology

	Online rep	Dedicated followers	First wave	Second wave	Discerning customers	Latecomers
I am motivated more by career progression than money	34%	49%	36%	27%	30%	25%
Time is more important to me than money	41%	54%	42%	36%	37%	34%
I don't mind taking risks with my money	16%	27%	17%	10%	10%	9%
For brands to be successful today, they must connect with customers in real life	55%	64%	55%	53%	53%	53%
I enjoy testing new products before they go on sale	34%	49%	38%	29%	26%	22%
I seek experiences that will make for great content on my social media	24%	39%	23%	17%	18%	14%
I trust products recommended by celebrities or influencers	16%	32%	16%	8%	9%	7%
I'm tired of dull shopping experiences	20%	28%	19%	17%	18%	18%

Our data indicates that early adopters in India are more likely to own a range of technology products. The most notable gap is among smart watch owners: three in ten (31%) own one of these devices compared to a fifth (22%) of the online public.

India: Device ownership among consumers and early adopters



Our data suggests there is meaningful distance between early adopters and the public in terms of purchase intention. There is a ten percentage point gap in intention to buy a new mobile handset in the next 2 – 6 months (45% EA; 35% nat rep) and a thirteen percentage point gap between those who intend to buy new consumer appliances in the next year (79% EA; 66% online rep).

How India's early adopters use the internet

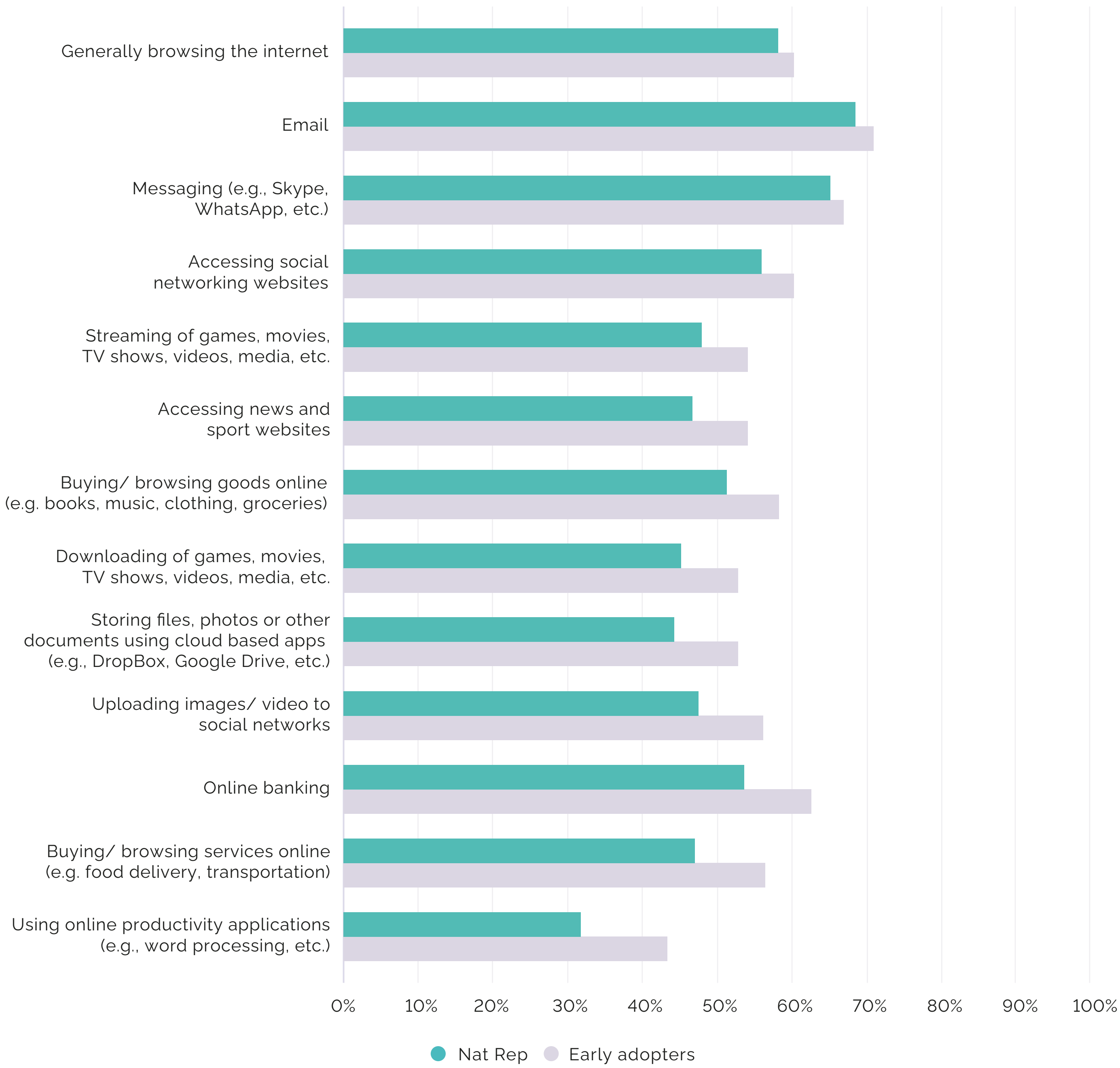
There are also notable differences between how early adopters and the online public use the internet. Our group of technophiles is more likely to engage in every category of digital activity.

However, it is important to note that in many categories the gap is only a few percentage points – suggesting a highly engaged online population. For example, six in ten (63%) early adopters use online banking, but so do 54% of the online public.

It's a similar story with buying and browsing for goods online (57% EA; 47% online rep) and streaming entertainment (54% EA; 28% online rep).

From a commercial perspective, marketers could potentially pitch certain products at both the wider consumer group and technophiles alike: a fintech app, for example, may in theory be appealing to each audience – as might a streaming or ecommerce platform.

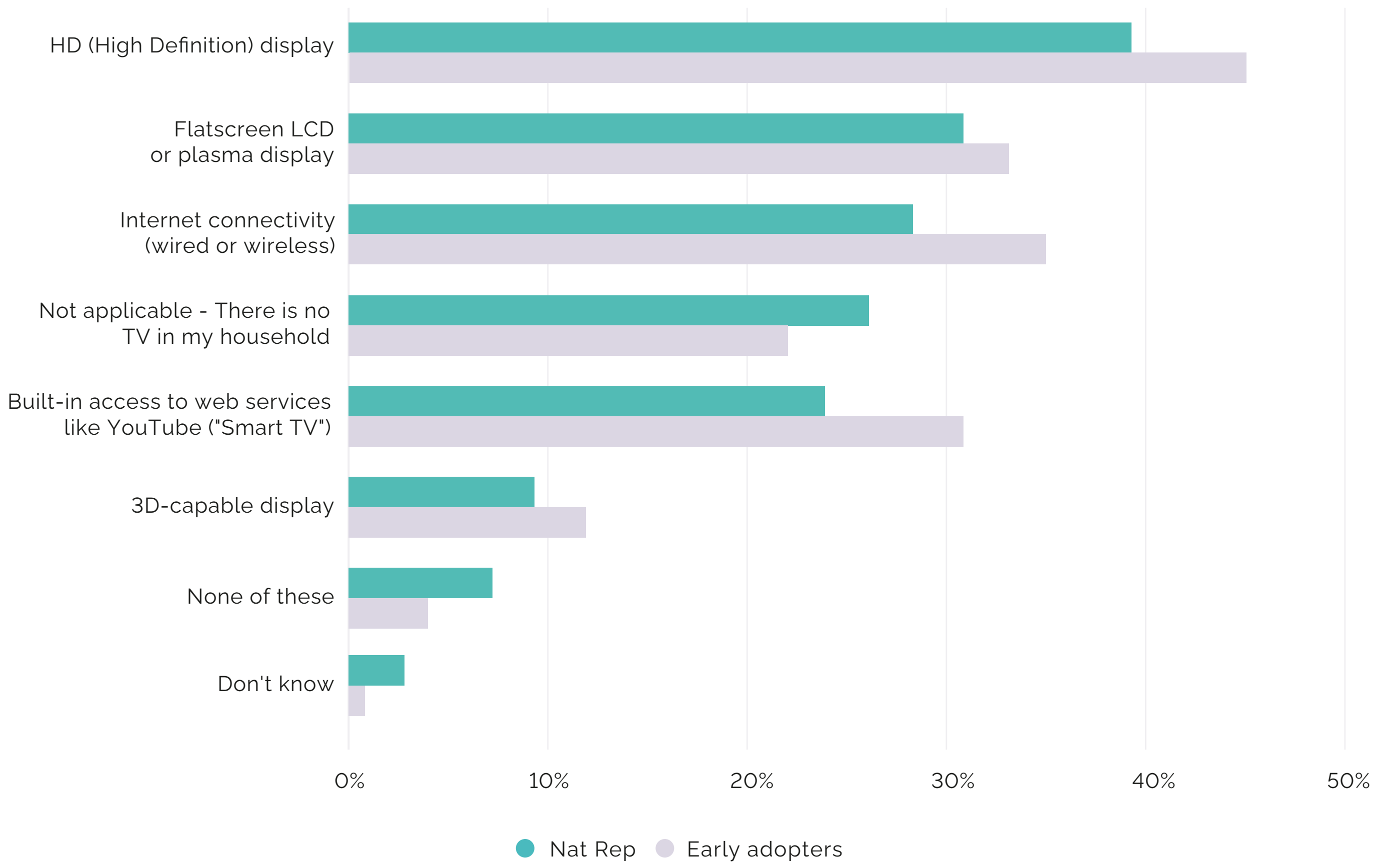
India: Internet activities of consumers and early adopters



There are, however, more significant differences in other categories. Early adopters are significantly more likely to use online productivity applications like word processors (44% EA; 32% online rep) and cloud technology (53% EA; 44% online rep). While there is still a substantial general audience for these products, marketers may want to emphasize aspects that appeal to consumers with higher technological literacy and enthusiasm.

The data shows that, on the subject of television, early adopters and the online public are not too far apart. Early adopters – who are more likely to own a TV – and the wider group of online consumers both put a high definition (HD) display at the top of their respective lists of most important features (45% EA; 39% online rep). On a related note, flatscreen LCD and plasma displays come in second for consumers (31%) and third for technophiles (33%), while 3D-capable displays are important to 9% and 12% respectively.

India: Most important features for the household's main television



There is, however, more divergence in other categories. Internet access, for example, is more important to early adopters than it is to the general public (35% EA vs. 28% online rep), as is built-in access to services such as YouTube (31% EA vs. 24% online rep). For companies selling TVs in India, it may make sense to market these products with a focus on web functionality.

THE TECHNOLOGY MARKET IN INDONESIA

The Indonesian government has said that technology will "deeply influence" the country's development in the future – and that the overall aim is for it to become a major digital hub for the Southeast Asia region. A 2019 study showed that Indonesia's internet economy was growing at "high speed".

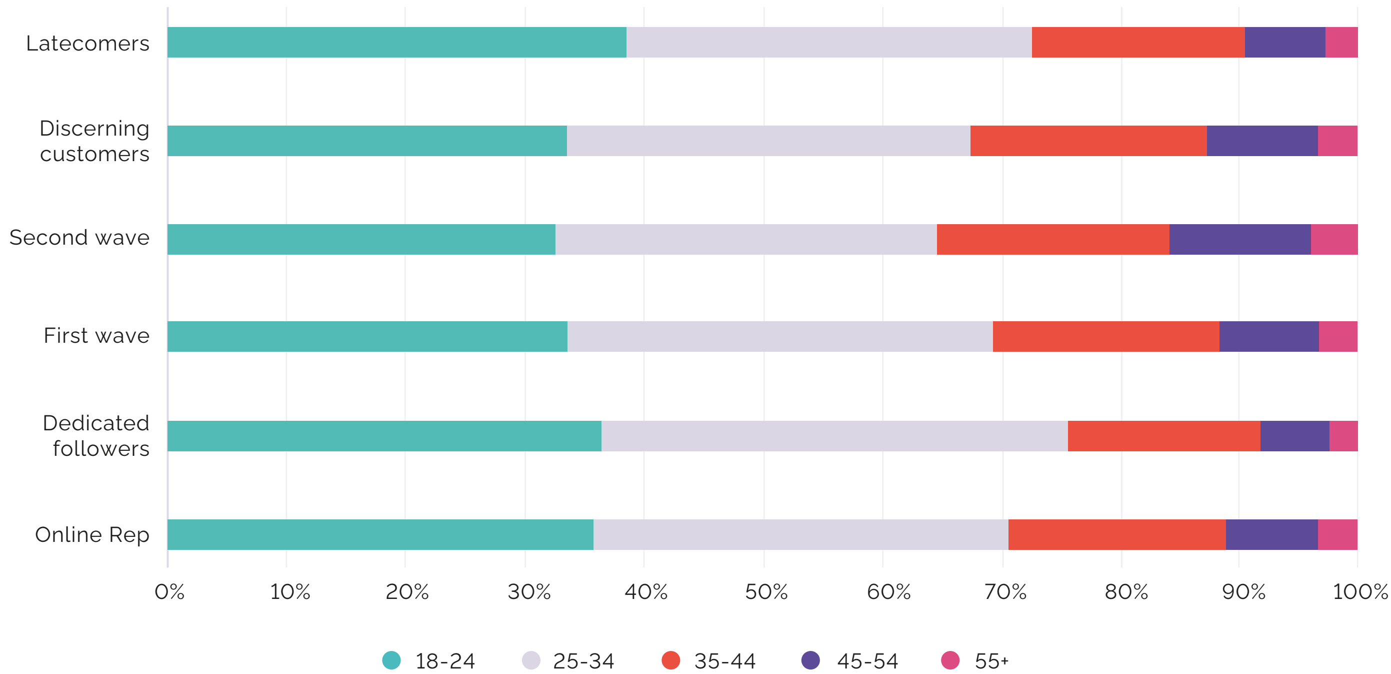
With 267 million people and a receptive consumer audience, Indonesia may present real opportunities for businesses looking to target large, addressable markets in Southeast Asia.

Accordingly, as with India, this chapter will highlight a wider range of technological sentiment among both Indonesia's general consumer audience and early adopters.

Early adopters in the Indonesian market

Indonesia's online audience (our sample here) comfortably outperforms the global average in terms of technology adoption. While latecomers make up the largest individual consumer category (30%), dedicated followers (23%) and first-wavers (9%) slightly outnumber them when combined into the "early adopter" group (31%). The second wave (19%) and the discerning customer group (20%) each claim a fifth of the overall audience.

Indonesia: Technology adoption by age



The demographic is similar to India: early adopters are largely aged 18-34 (76% DF; 69% FW; 71% online rep) and male (65% DF; 60% FW; 54% online rep), with larger amounts of disposable income: if 20% of the online population have RP 2,500,000 – 7,499,999 to spend per month, it increases to over a quarter of early adopters (29% DF; 26% FW).

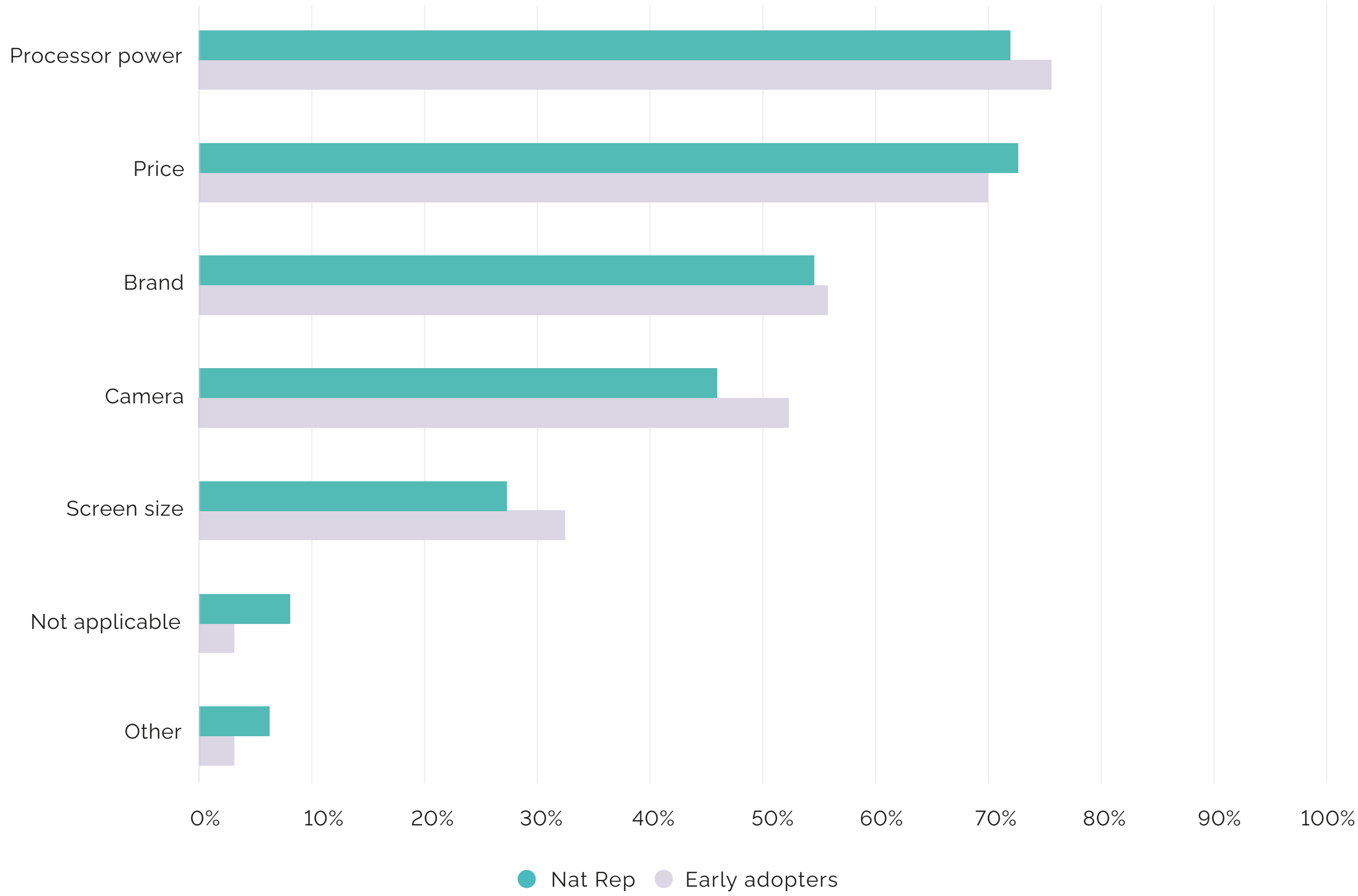
The Indonesian smartphone market

There are some core differences between Indonesia's early adopters and the general online audience, and the country's smartphone market highlights these differences.

Dedicated followers and first-wavers are 11 percentage points more likely to buy a new handset in the next 2-6 months (36% EA; 25% online rep). But what do they consider most important about these handsets? In a world where an iPhone, Samsung Galaxy, or Google Pixel device can be a status symbol, it makes sense that the more technologically enthusiastic group would be less concerned about price. Regular consumers are more likely to consider cost a major factor by six percentage points (70% EA; 76% online rep). In other respects, these audiences are quite close: three-quarters of each group cite processor power (76% EA; 74% online rep), while over half (55% EA; 56% online rep) think the particular brand is important.

The main differentiators are the camera – with half of early adopters (52%) listing it compared to 47% of the online public – and screen size, which is mentioned by a third of the most highly engaged consumers (33%) compared to under three in ten (28%) within the online public.

Indonesia: What drives smartphone purchase decisions?

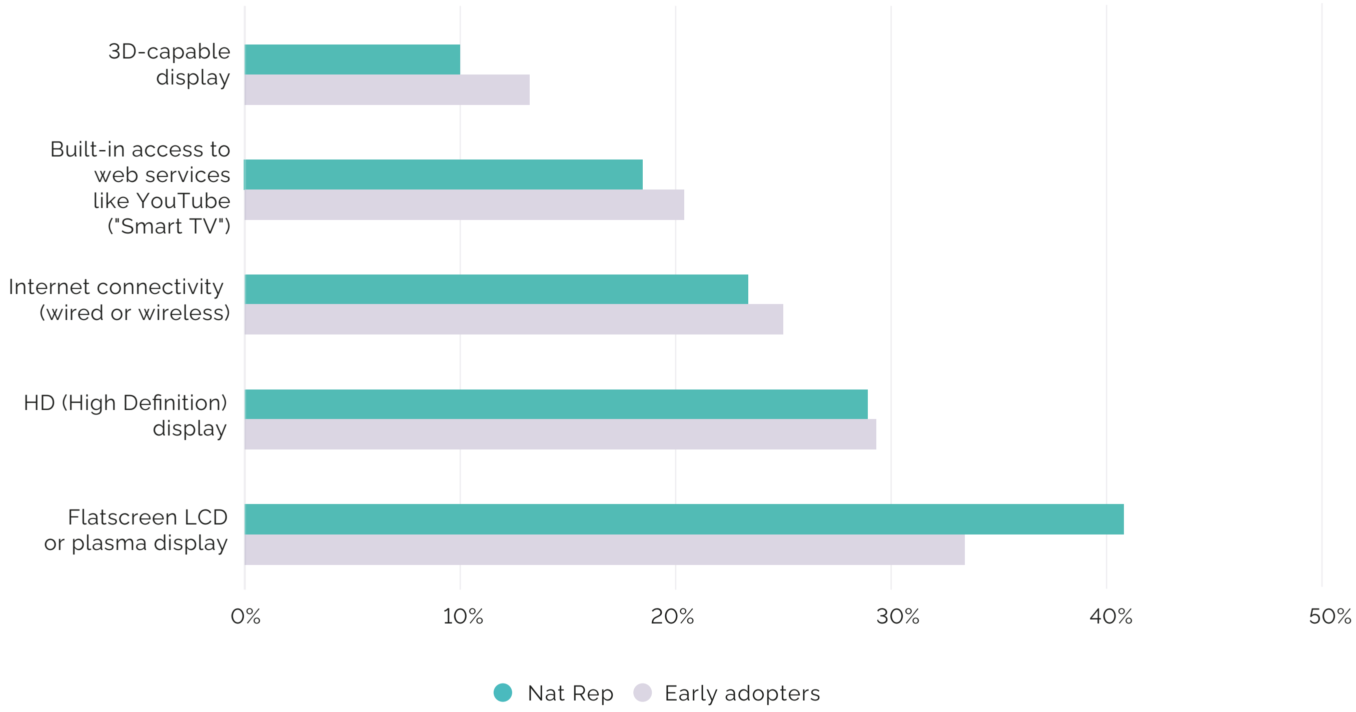


There are also some stark differences between the two groups when it comes to their favourite mobile applications. Indonesia's early adopters are six percentage points more likely to use their smartphones to follow their favourite sports (24% EA vs. 18% online rep) and monitor their health and fitness (27% EA vs. 21% online rep).

What Indonesians want from their TV sets

Most Indonesian consumers do not want their TV sets to dominate the room. Almost six in ten (58%) say they prefer a small or medium television. That said, early adopters are more likely to think bigger is better: over a third (35%) prefer their televisions to be large, extra large, or extra-extra large.

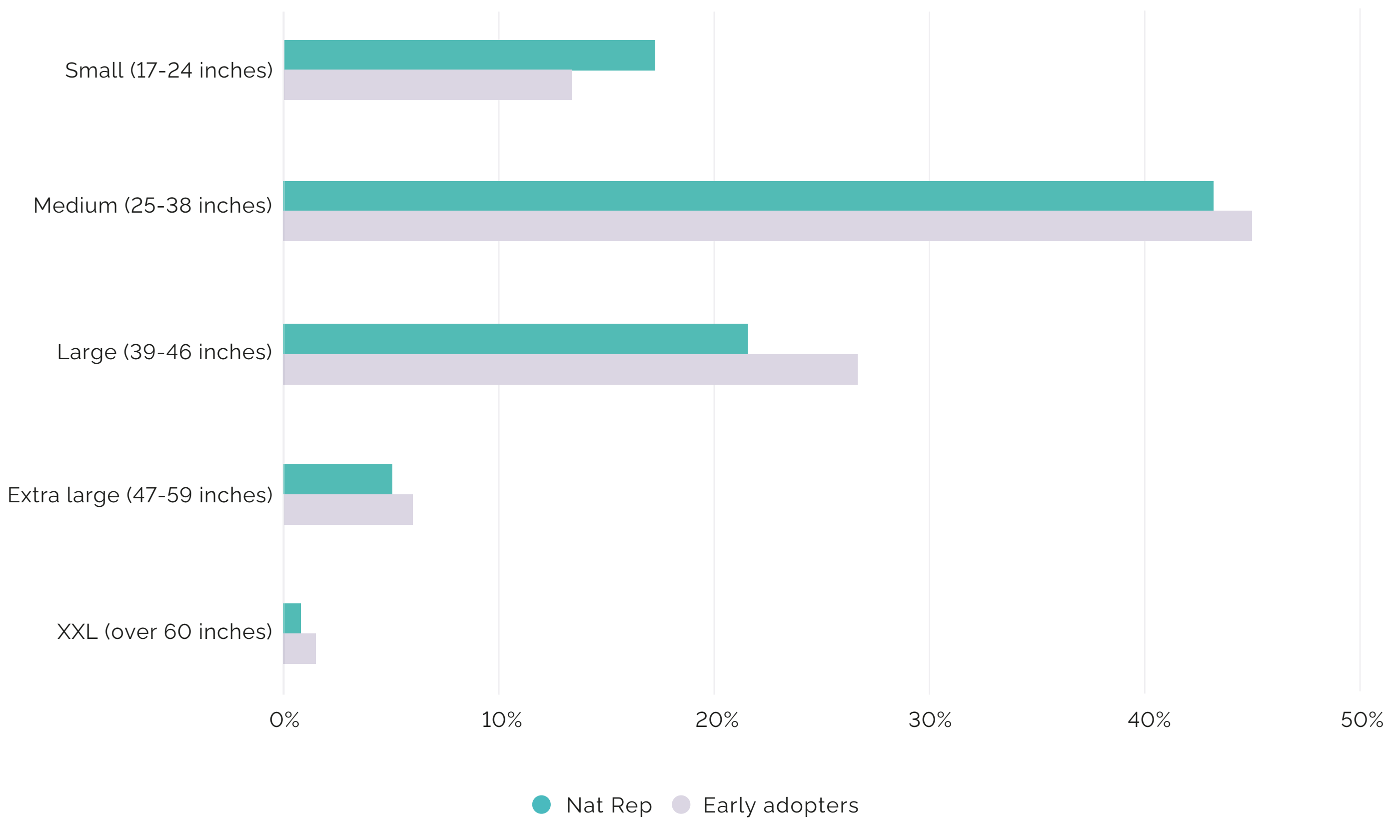
Indonesia: Most important features for the household's main television



But size is not everything, and Indonesians cite a range of features when asked about the most important parts of their main TV set. The properties of the display are given particular weight by both consumer groups: a third of early adopters (33%) and the general online audience (36%) say a flatscreen LCD or plasma screen is crucial, and over a quarter say the same of a high-definition display (26% EA; 29% online rep). These features are more important to the wider consumer group than they are to the most engaged customers.

As in India, early adopters are more likely to mention internet capability by five percentage points: a quarter (25%) say that internet connectivity matters compared to a fifth (20%) of the online public, while 20% say they want access to web services like YouTube next to 15% of the wider group.

Indonesia: TV size preferences among consumers and early adopters



CONCLUSION

YouGov's data shows that global attitudes towards technology cannot be neatly summarized – even when it comes to the more engaged and more enthusiastic group of "early adopters".

The commercial opportunities in the markets featured in our study – and those in technology markets around the globe – are far from uniform, and the challenges are equally diverse. To take advantage of these opportunities and meet these challenges, brands need to:

1. Reassure and educate prospective customers

A majority of Germans – including early adopters – think reliance on digital assistants is a potential menace to society. A substantial minority of Americans are worried that their smart lightbulb or fridge will leave them vulnerable to hackers.

Brands should make concentrated efforts to inform and educate consumers when these fears are unfounded. French people might be worried about 5G, for example, but a significant subset have learned about it from the news and a smaller, but still important group have heard nothing about the next-generation technology at all. Companies will benefit from making sure their brand voice is part of this communications mix – and reassuring potential customers whenever and wherever it is possible to do so.

2. Engage high-information, high-engagement consumers…

In every market featured in our study, early adopters are more likely to care about technological capabilities. This applies both in a general sense (i.e. the 49% of first-wavers who enjoy testing new products) and when it comes to individual features and benefits (i.e. the 30% of German early adopters who are sincerely excited at the prospect of extra security features in their digital assistants).

When brands target this audience, they may therefore wish to focus on the high-technology aspects of a particular product or service.

3. …while understanding that regular consumers have more regular priorities

If early adopters are more likely to get excited by technical specifications and next-generation technology, the wider consumer group has more straightforward concerns. In every market cited in this study, they are more likely to care about cost and convenience: two-fifths of Americans, for example, are turned off smart homes because of the price, while a quarter simply don't want to remember any more passwords. In Indonesia, early adopters may be more likely to want a gigantic XXL flatscreen TV than our overall online sample – but both they and regular consumers, perhaps being conscious of living room space, are more likely to go for a modestly-sized set.

To target this larger group effectively, marketers may need to emphasise ease of use, accessibility, and simplicity to communicate how this technology can meaningfully improve their daily lives.

4. Think global and local

There are markets in our study where early adopters are a small minority – and there are countries such as India and Indonesia, where enthusiasm for technology is so high that they account for a plurality of all consumers. Reaching consumers in these countries, and creating messaging that resonate with them means acquiring a deep understanding of their idiosyncrasies – wherever they are.

Because an effective global technology strategy is ultimately a series of local technology strategies: strategies that uncover and act on meaningful insights into the differing sentiments, demographics, and trends of each market.

This paper represents a fraction of our data on the global technology industry.

OUR DATA

For this study, YouGov used data from our leading syndicated tool, YouGov Profiles which, together with BrandIndex, forms part of our YouGov Plan & Track suite that enables clients to make informed decisions about the trajectory of their businesses.

Data from each market uses a nationally representative sample, apart from select markets where an online representative sample is used.

Canada
China
Denmark
Finland
France
Germany
Great Britain
Hong Kong (Online-Rep)
India (Urban-Rep)
Indonesia (Online-Rep)
Italy
Japan
Mexico
Malaysia (Online-Rep)
Norway
Philippines (Online-rep)
Russia
Singapore
Spain
Sweden
Taiwan (Online-rep)
Thailand (Online-rep)
USA
Vietnam (Online-rep)

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YouGov is an international research data and analytics group headquartered in London. Our data-led offering supports and improves a wide spectrum of marketing activities of a customer-base including media owners, brands and media agencies. We work with some of the world's most recognised brands.

Our line of products and services includes YouGov BrandIndex, YouGov Profiles, YouGov RealTime, YouGov Custom Research, YouGov Crunch and YouGov Direct.

With over 11 million registered panellists in more than 40 countries, YouGov's market research covers the UK, the Americas, Mainland Europe, the Middle East, and Asia-Pacific. Our panellists come from all ages, socio-economic groups, and other demographic types – allowing us to create nationally and internationally representative online samples of consumers.

For more information, visit **yougov.com**

YouGov is a global provider of analysis and data generated by registered panellists in more than 40 markets. As the market research pioneer of Multilevel Regression with Poststratification (MRP) for accurate predictions at a granular level, our data consistently outperforms others on accuracy, as concluded by Pew Research. Combine that with our advanced analytical technology, powered by YouGov Crunch, and we are able to generate the most accurate, complete, and dynamic portrait of the world.