GLOBAL TECHNOLOGY WHITEPAPER 2023

Consumer electronics

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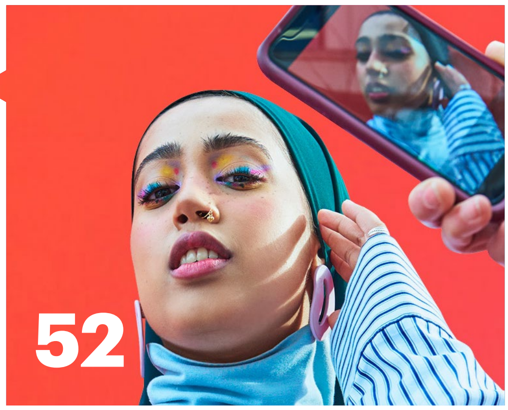
Safety and sustainability in 2023

YouGov

Inside



Introduction

In the competitive electronics goods sector, it's important for manufacturers and marketers to understand the mindset of consumers and what influences them when purchasing electronics.

Sustainability and data safety are hot topics in the industry and are becoming higher in importance when purchasing, with an increasing focus on more environmentally friendly options and products that offer enhanced data security measures. Manufacturers and brands will need to meet the challenge of rising consumer preferences in these two fields.

This global report examines consumer buying behaviour of electronics goods, identifies the factors that influence purchases, uncovers where sustainability and data privacy rank in the purchasing decision hierarchy, explores consumer attitudes to green technology, data privacy, and the preferred security measures for device protection. Using recent YouGov research across 18 international markets, this study will help marketers and original equipment manufacturers (OEMs) gain a better understanding of consumer behaviour and attitudes around these themes.

While our samples are nationally representative of each population, in some Asian markets, samples are representative of the online or urban population. See methodology for details.

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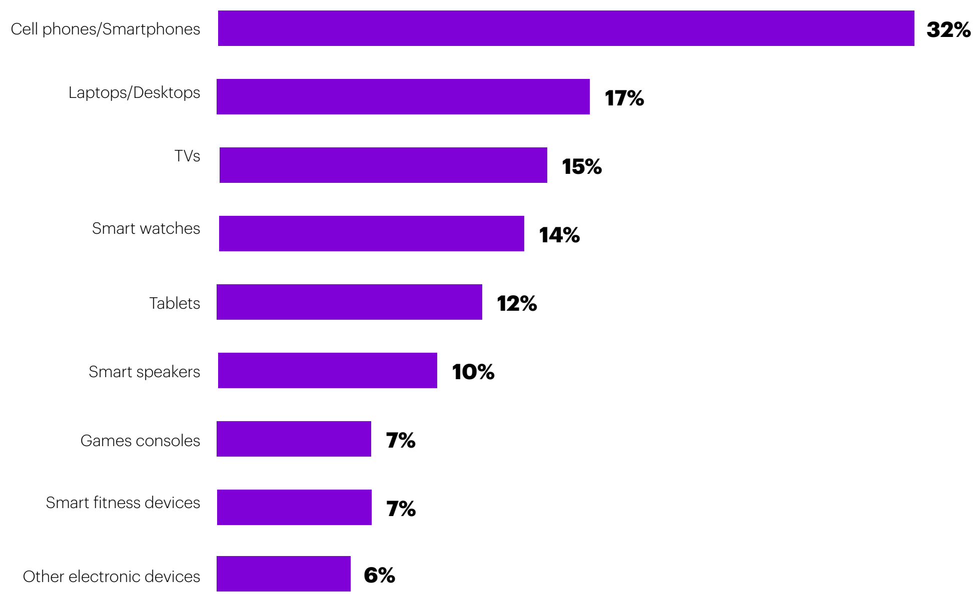
PART - 1

Understanding the role sustainability and data privacy play in past and future electronics purchases

In this first section we examine the key purchase drivers for electronics, and connected devices, and the importance of sustainability in the buying decision making process.

Starting with recent purchasing of electronics goods across the globe, YouGov research across 18 international markets reveals that almost two thirds of global consumers have bought at least one of the electronics products listed* in the last year **(63%).**

Electronics products purchased in the last 12 months (Global)



Q: Which, if any, of the following products have you purchased in the 12 months?
**Electronics products – Cell phones, smartphones, laptops/desktops, TVs, smart watches/speakers/fitness devices, tablets, games consoles.*

The most popular purchases are smartphones/cell phones with almost a third **(32%)** globally having purchased one during the last year, followed by laptops/desktops **(17%)** and TVs **(15%)** with tablets purchased by **12%** of consumers. Focusing on smart devices, watches had a slight edge over speakers, and smart fitness devices are on par with video game console purchases.

In many Western markets tablet penetration continues to drop with few consumers replacing the device. This is counter balanced by other markets where purchasing tablets is fairly high, resulting in an average of **12%** of consumers purchasing globally.

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Comparing electronics products purchased in the last 12 months by country, we see the highest proportion of purchases made in Mexico and the Asian markets. Focusing on smartphone purchases, Mexico and China have the highest penetrations with almost one in two **(47%)** making a purchase in the last 12 months, closely followed by UAE, India, Indonesia, and Hong Kong. UAE ranked as the top purchaser of laptops and tablets, whereas India peaks for smart devices (watches, speakers, and fitness devices). Overall, emerging Asian markets are purchasing more electronics than European markets.

Electronics products purchased in the last 12 months by country

	Cell phones/ Smartphones	Laptops/ Desktops	TVs	Smart watches	Tablets	Smart speakers	Games consoles	Smart fitness device
Global Total	**32%**	**17%**	**15%**	**14%**	**12%**	**10%**	**7%**	**7%**
Mexico	47%	21%	24%	18%	15%	22%	12%	8%
China	47%	26%	14%	19%	19%	14%	10%	9%
UAE	46%	31%	22%	30%	23%	19%	12%	13%
India	45%	28%	21%	31%	13%	20%	9%	18%
Indonesia	43%	20%	19%	10%	8%	10%	9%	5%
Hong Kong	42%	20%	17%	21%	20%	11%	13%	8%
Poland	37%	17%	16%	15%	9%	6%	6%	4%
Spain	36%	15%	18%	19%	12%	10%	7%	6%
Italy	30%	15%	21%	13%	10%	6%	5%	5%
Singapore	27%	14%	9%	10%	9%	5%	4%	6%
Canada	27%	18%	13%	11%	11%	8%	6%	4%
Australia	27%	23%	17%	13%	13%	9%	9%	9%
Sweden	27%	11%	12%	9%	11%	7%	6%	4%
France	26%	13%	13%	9%	9%	8%	7%	3%
US	25%	14%	12%	8%	9%	6%	7%	5%
Germany	25%	15%	14%	9%	12%	7%	7%	6%
Denmark	23%	10%	12%	7%	10%	6%	3%	3%
GB	19%	11%	9%	7%	8%	4%	5%	5%

Q: Which, if any, of the following products have you purchased in the 12 months? Please tick all that apply

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Price is the key driver for past purchases

It is important for OEM and brand marketers to understand the key motivations that encourage purchase, to inform how they can entice new and existing customers. YouGov global data reveals that price is the top driver for all the electronics purchases in the last 12 months. Across the broad range of devices purchased, price by far is the standout driver, with half or more buyers citing it as the most important reason. However, it is worth noting that price is often impacted by the brand name and consumers often pay higher prices for well-known brands. Along with price, ease of use and the features available consistently appear as the top three reasons for buyers of all electronics devices.

Reasons for purchasing any electronics products in the last 12 months (Global)

	Any electronic product bought in the last 12 months	TVs	Cell phones/ Smartphones	Laptops/ Desktops	Games consoles	Tablets	Smart watches	Smart fitness devices	Smart speakers
Price	64%	71%	71%	69%	50%	60%	60%	54%	57%
Features available	48%	49%	50%	54%	40%	42%	54%	45%	42%
Ease of use	43%	38%	46%	42%	35%	45%	45%	45%	47%
Brand name	38%	39%	42%	37%	37%	43%	33%	29%	35%
Design	30%	28%	26%	28%	28%	28%	38%	33%	34%
Integration with other devices	24%	24%	16%	19%	21%	26%	34%	33%	37%
The latest model	22%	23%	19%	16%	36%	23%	18%	25%	21%
Privacy/security and data protection	20%	10%	25%	21%	23%	24%	17%	26%	17%
Color	16%	14%	14%	9%	18%	15%	21%	20%	17%
Sustainable/ environmentally friendly	14%	13%	10%	12%	19%	15%	11%	22%	16%

Q: Thinking back to when you bought, which of the following reasons were most important to you?
Base: Those who have purchased the electronics product in the last year.

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Brand name is of higher importance for cell phone and tablet buyers, and **design and color** are more important for smart device buyers (watches, fitness devices, and speakers). In addition, the ability to integrate with other devices is of higher importance for smart devices than other electronics goods.

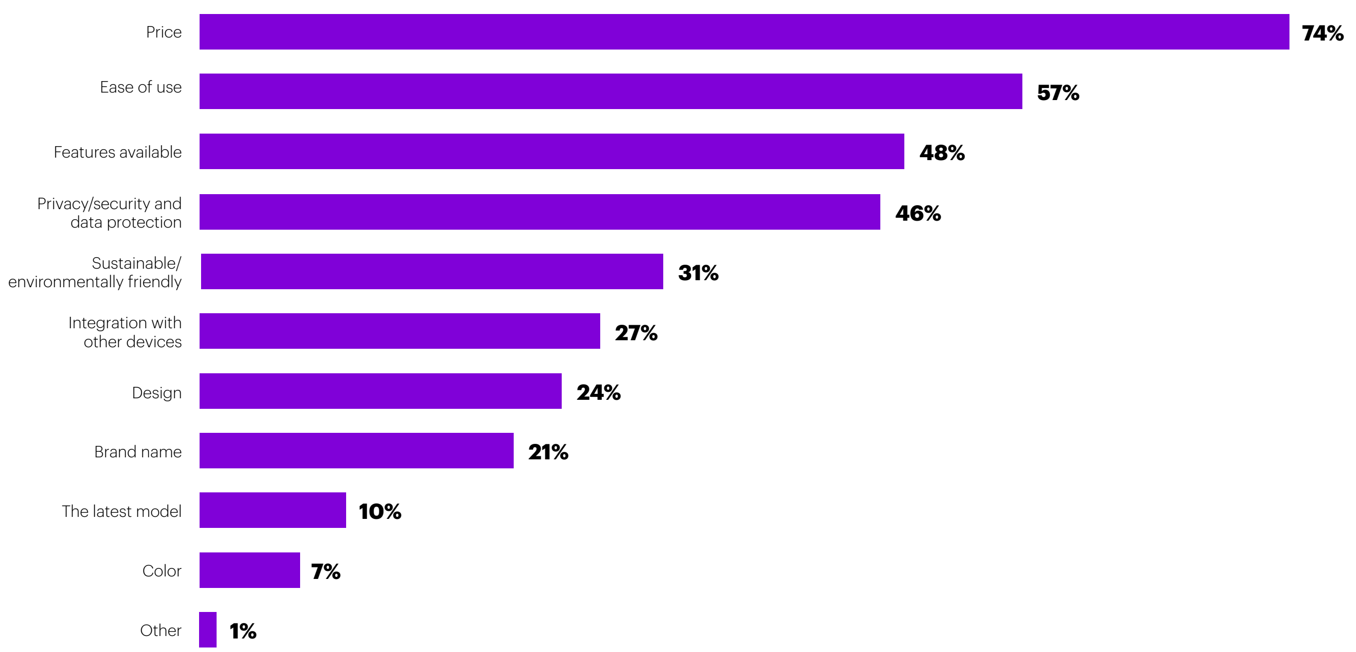
Privacy/security and data protection are more important for buyers of smart fitness devices, cell phones, tablets, and video game consoles, with one in four saying it is one of the most important reasons for them. This may be driven by the fact that these devices are used for the sharing of personal or sensitive data such as health, or financial information or for socialising/connecting on social media.

Although **sustainability** ranks lower across the range of electronics products, among smart fitness devices and video game console buyers, it increases in importance.

Sustainability and data privacy increase in importance for future electronics purchase

When considering the purchase of any consumer electronics in the future, the top three reasons mirror those for past purchases: price, ease of use and features available.

Reasons for purchasing any electronics products in the future (Global)



Q: Thinking about consumer electronics in the future... Which of the following reasons are most important to you?

However, data privacy and sustainability increase in importance for future electronics purchases. Privacy and security moves from eighth (out of 10 priorities) for previous purchases, to fourth for future purchases, while sustainability moves from tenth for previous purchases, to fifth for future purchase priorities. This suggests that consumers are increasingly receptive to sustainability and privacy when considering new electronics purchases, and may be more receptive, and attracted to the changes that OEMs are making to be more sustainable and safer.

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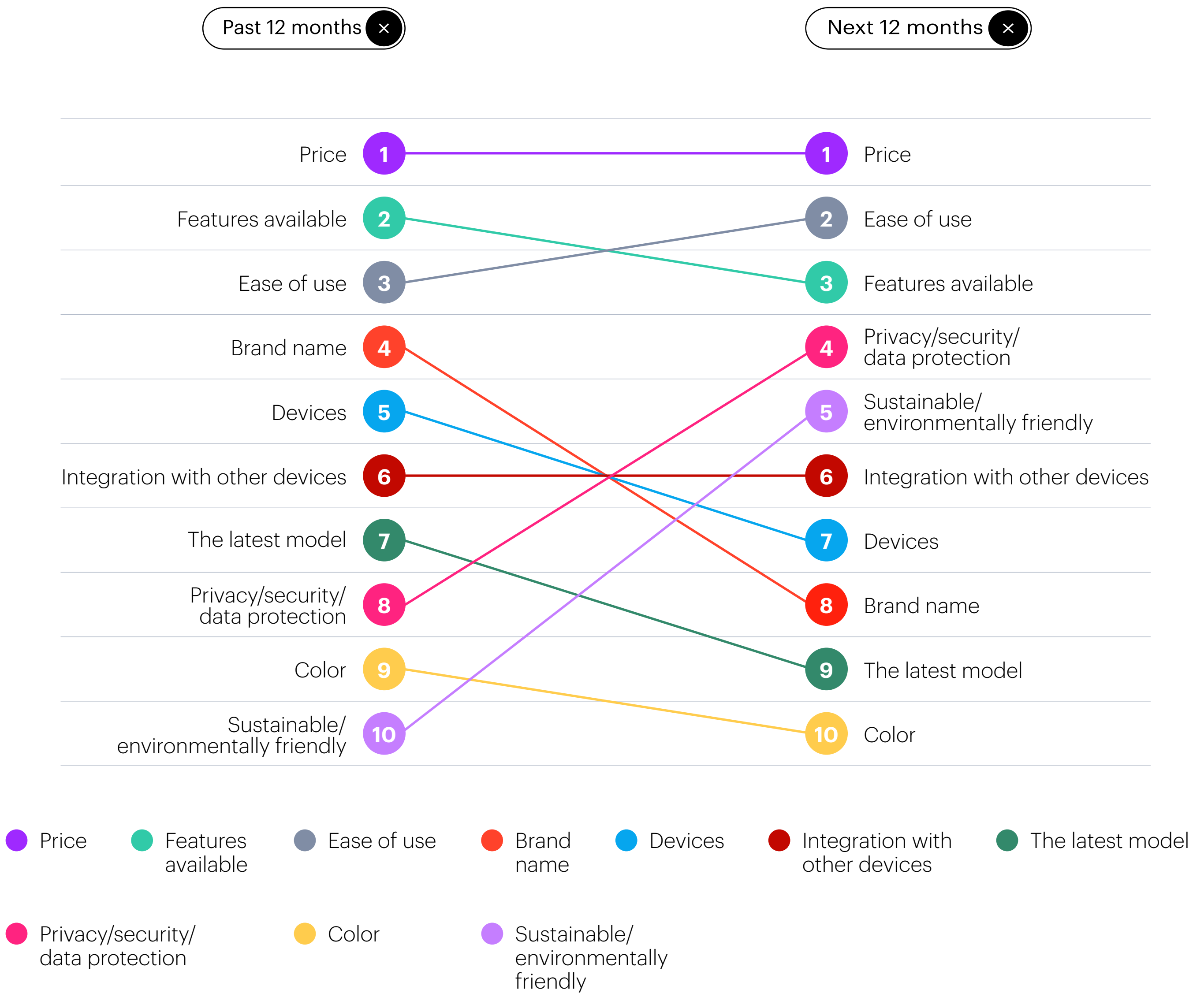
Reasons of importance for past and future purchases of electronics products (Global)



Q: Which, if any, of the following products have you purchased in the 12 months? Please tick all that apply
Q: Thinking about consumer electronics in the future... Which of the following reasons are most important to you?

Younger age groups more focused on the design

Focusing on the key areas of importance by demographic groups some interesting differences emerge. Three quarters of consumers globally, state price as the most important factor in future electronics purchases, however price is less of a priority for younger age groups (under 34s) whereas, the aesthetics of the product are more important. More than double the amount of under 24s consider design to be important than those in the older 55+ age group. Although only one in ten under 34s state color as important, it is twice as many as those aged 45+. While the features available are more important for younger generations, having the latest model is of almost equal importance for all age bands, except for the over 55s.

Reasons of importance in the purchase of any electronic product in the future by age (Global)						
	Global Total	18-24	25-34	35-44	45-54	55+
Price	**74%**	68%	69%	75%	75%	77%
Ease of use	**57%**	48%	49%	52%	57%	66%
Features available	**48%**	53%	51%	47%	46%	45%
Privacy/security and data protection	**46%**	47%	41%	43%	43%	49%
Sustainable/environmentally friendly	**31%**	33%	28%	27%	30%	34%
Integration with other devices	**27%**	24%	26%	28%	29%	28%
Design	**24%**	37%	31%	28%	24%	17%
Brand name	**21%**	19%	22%	22%	23%	21%
The latest model	**10%**	12%	11%	12%	11%	7%
Color	**7%**	11%	10%	9%	5%	5%

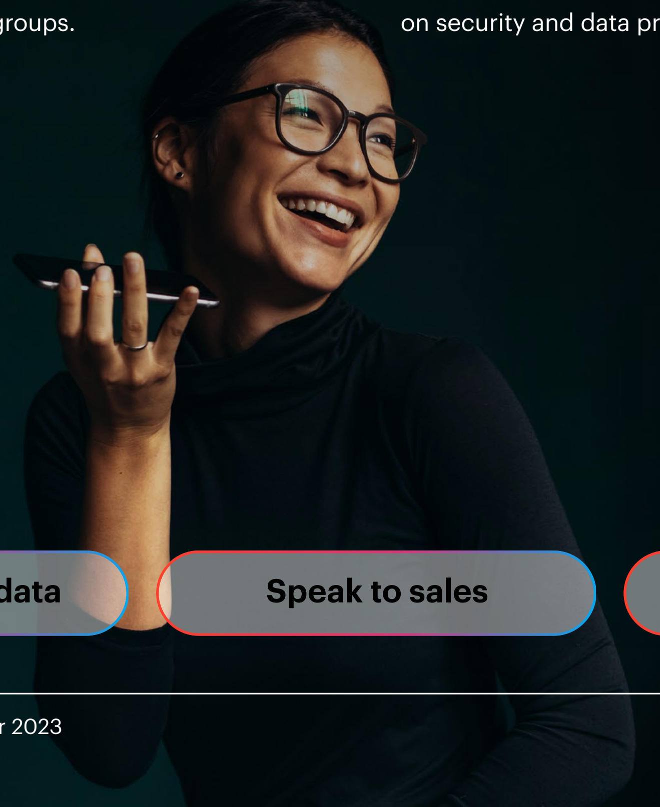
Q: Thinking about consumer electronics in the future... Which of the following reasons are most important to you?

Older age groups are more pragmatic

In comparison, older age groups opt for more practical reasons when choosing electronics, such as the price of the product and ease of use. On the other hand, the integration with other devices is of equal importance for them as it is for other age groups.

Sustainability and data privacy unite young and old

YouGov data shows that older people care just as much about the environment and sustainability as younger people when it comes to purchasing electronics goods. At the same time, younger generations are as equally focused on security and data protection as older consumers.



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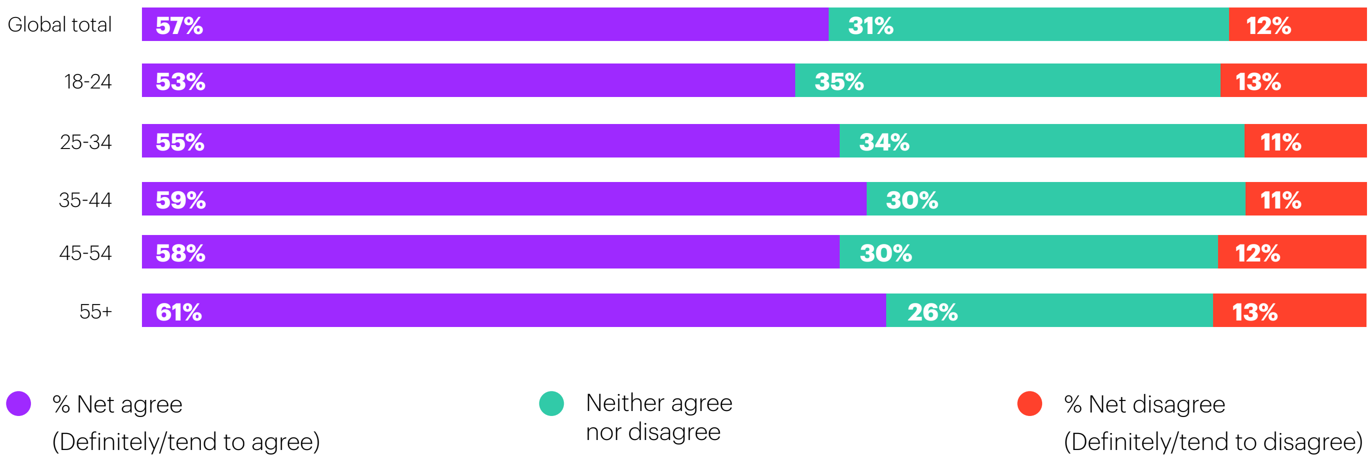
The perceived price of being environmentally friendly

A further challenge faced by consumer brands striving to be green is how this impacts the cost of the product. Looking at global attitudes towards the cost of environmentally friendly products, almost six in ten **(57%)** consumers agree that products that are better for the planet are more expensive. Older age groups are more likely to agree with the statement than younger adults. With cost a key driver to purchase, it will be important for marketers and OEMs to reassure electronics customers that they are not paying extra to buy sustainable electronics to alleviate this as a potential purchase barrier.

Agreement with the statement: 'I think products that are better for the planet are usually more expensive' (Global)



Q: Do you agree or disagree with the following statement: I think products that are better for the planet are more expensive.

In the fight against climate change, many electronics companies have already committed to adopting strategies to reduce their impact on the environment, be it via reducing reliance on single use plastic/non-recyclable packaging or reducing carbon emissions in the fight against climate change. Transparency around sustainability efforts will help electronics brands differentiate themselves in the market and appeal to the environmentally conscious tech consumers across a range of age groups. A key message for electronics brand marketers and OEMs is that there is an appetite for sustainability in consumer electronics products for both younger and older generations alike.

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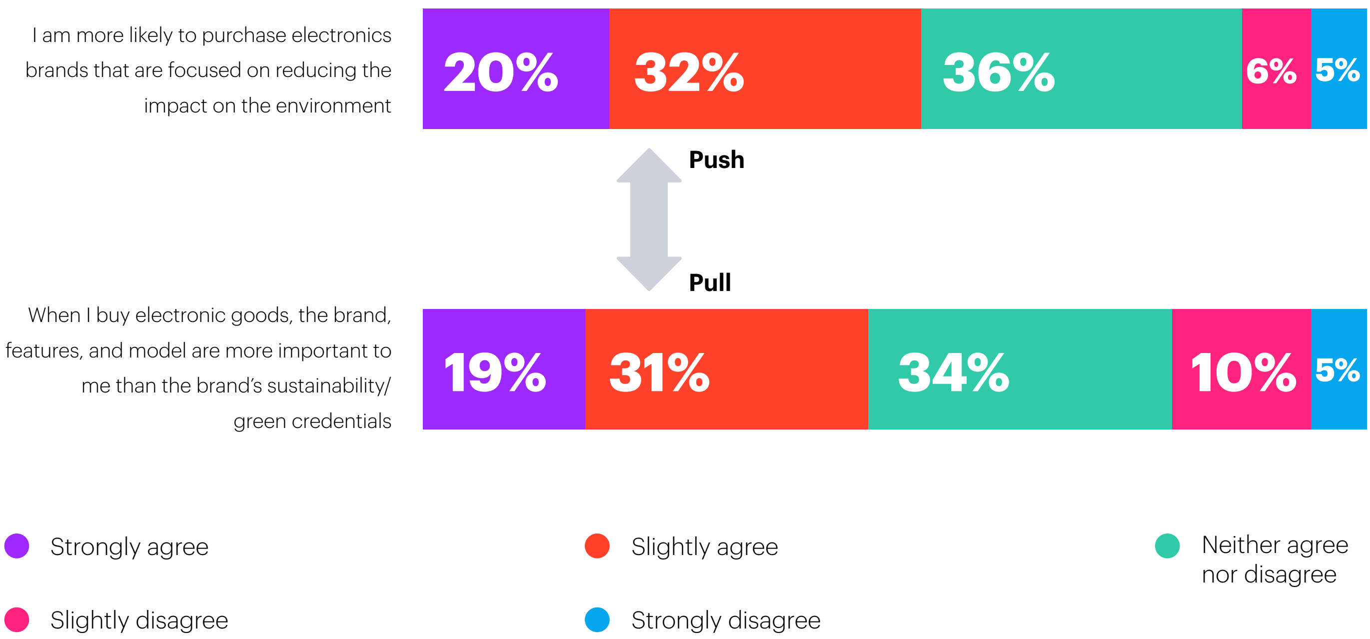
Push-pull effect

When considering consumer electronics in the future, buying environmentally friendly products is becoming increasingly important in the purchase decision tree for global consumers.

When we explore consumer attitudes overall to buying consumer electronics, we see half globally **(52%)** agree that they are more likely to purchase electronics brands that are focused on reducing the impact of the environment, pushing them to make sustainable choices and by far outweighing those who disagree **(11%)**. However, they are also equally tempted by the brand appeal, features, and model above the brands sustainable/green credentials, pulling them away from sustainable choices.

Therefore, a dichotomy between sustainable choices and the allure of the brand/model and features exists among consumers, who oscillate between desiring the latest and most up-to-date model, and wanting to do so in a sustainable way, presenting a clear challenge for electronics brand marketers and OEMs.

Agreement with statements around sustainability and buying electronics goods (Global)



Q: To what extent do you agree with the following statements?

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Push pull effect by country

When exploring attitudes to buying electronics goods by country we see some interesting differences. The countries where the gap between those who intend to buy eco-friendly electronics products and those agreeing that they focus more on device brand, features and model, is wider are in Mexico, Italy, and France with a gap of almost 20 percentage points in favour of sustainability. Overall, in 12 out of 18 countries there are higher proportions of agreement with sustainability. Where the scales reverse and the brand/model and features are of higher importance than the green credentials are Denmark, Sweden and the US and the Asian markets of Singapore, Hong Kong, and China. For some countries however, the push-pull effect is almost level (Canada, Great Britain, China, and UAE).

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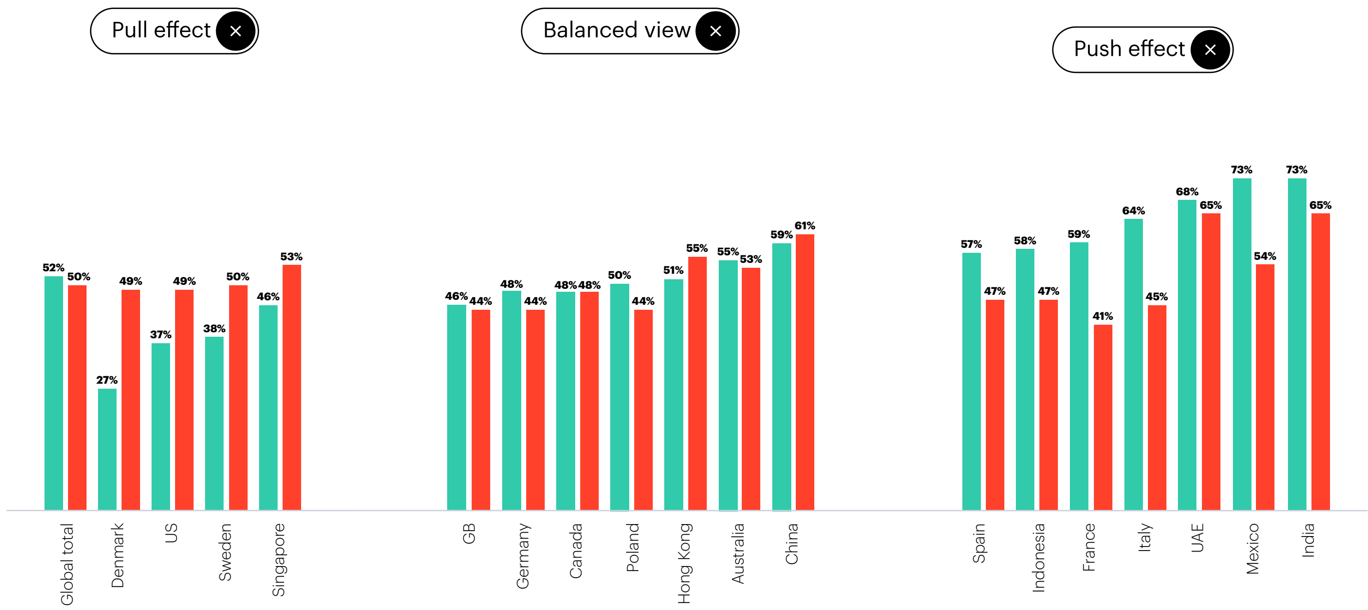
Net agreement with statements around sustainability and buying electronics goods by country (Strongly/slightly agree)



- I am more likely to purchase electronics brands that are focused on reducing the impact on the environment
- When I buy electronic goods, the brand, features, and model are more important to me than the brand's sustainability/green credentials

Each country has its own requirements and regulations to reduce the levels of electronic waste (e-waste), reduce carbon emissions, be more environmentally sustainable and work towards a more circular economy. Consumer tech brands need to have a long-term business strategy to embed sustainability across the manufacturing process and the product life cycle as environmental conservation becomes an increasing priority.

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Marketer insight:
Defining Sustainability

It will come as no surprise that sustainability in the tech sector is an increasingly sizable point of focus for brands, manufacturers, and consumers. With many companies now including sustainability in their purpose statement, and consumers becoming more invested in the fight against climate change, the demand for transparency and accountability will increase. Marketing departments will be tasked with crafting clear definitions of what sustainability means for the company, creating detailed plans to make sure that the company is making good on its promises, and periodically communicating results and actions with the public. This is a great opportunity for marketing professionals to build positive associations for their brands, not only through communications, but also by bringing sustainability to product development and recycling programmes, while promoting positive change that will benefit both the company, and the world.

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PART - 2

The path towards a circular economy

In this next section we tackle e-waste head on, identifying what consumers are doing with their old technology and their attitudes to refurbishing, trading-in, and reusing tech. In addition, we explore raising awareness of eSIMS and which tactics could be adopted to encourage a more circular tech economy.

A circular economy is a model of production and consumption, which involves sharing, leasing, reusing, repairing, refurbishing and recycling existing materials and products as long as possible.

Many major players in the technology industry are actively adopting the circular economy model and are setting ambitious targets. They are redesigning their products to make them easier to repair and more recyclable and offering consumers sustainable options if they choose to upgrade their old devices. The first area of exploration is the lifecycle of old technology and understanding if customers across the globe are repurposing their old tech.

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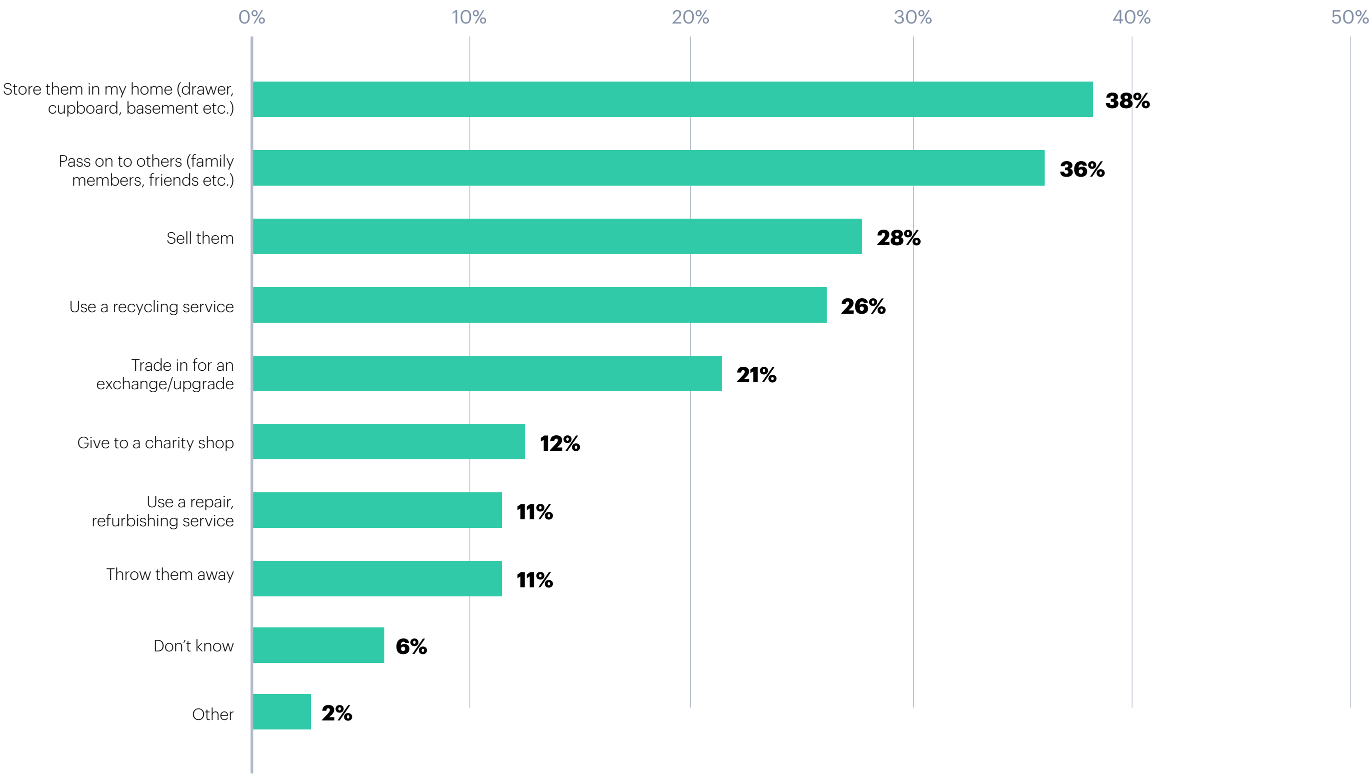
Breathing new life into old technology

When we asked consumers what they do with their obsolete electronic products, more than a third said they are prolonging their life by passing them onto others but almost the same amount isn't doing anything with them, and simply store them somewhere at home. Nearly three in ten take a commercial approach and sell them on to someone else and a fifth trade them in to get money off an exchange or an upgrade. A quarter opt to use a recycling service and one in ten use a repair or refurbishing service to expand product lifespan. Only **11%** are throwing them away and could be sending them to landfill.

What happens to electronics no longer needed (Global)



Q: What do you tend to do with the electronics products you own (laptops, smartphones, cameras, games consoles, etc.) when you no longer need them?

Comparing what happens to electronics products that are no longer required there are some interesting nuances by age.

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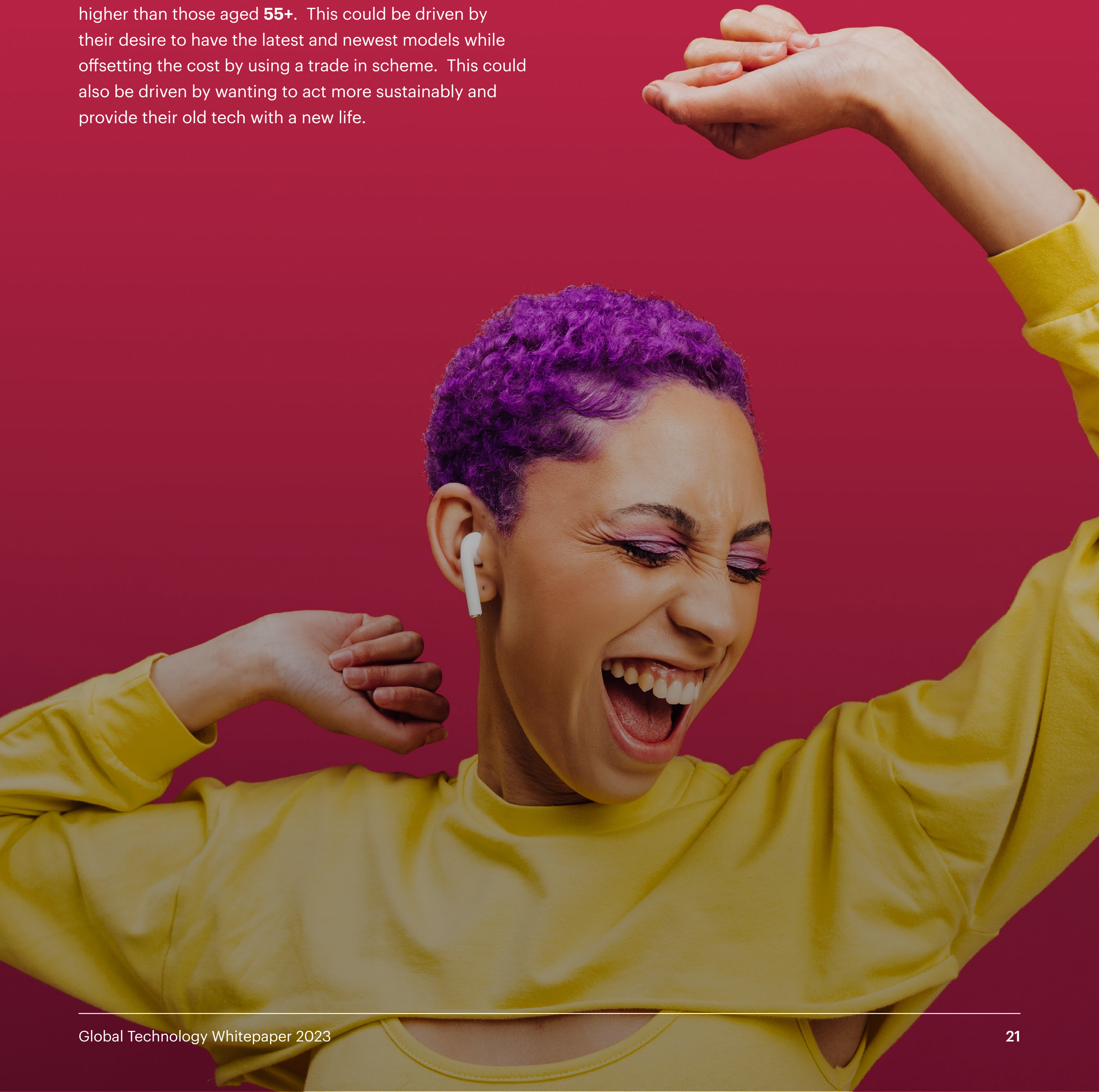
Younger age groups are more commercially savvy

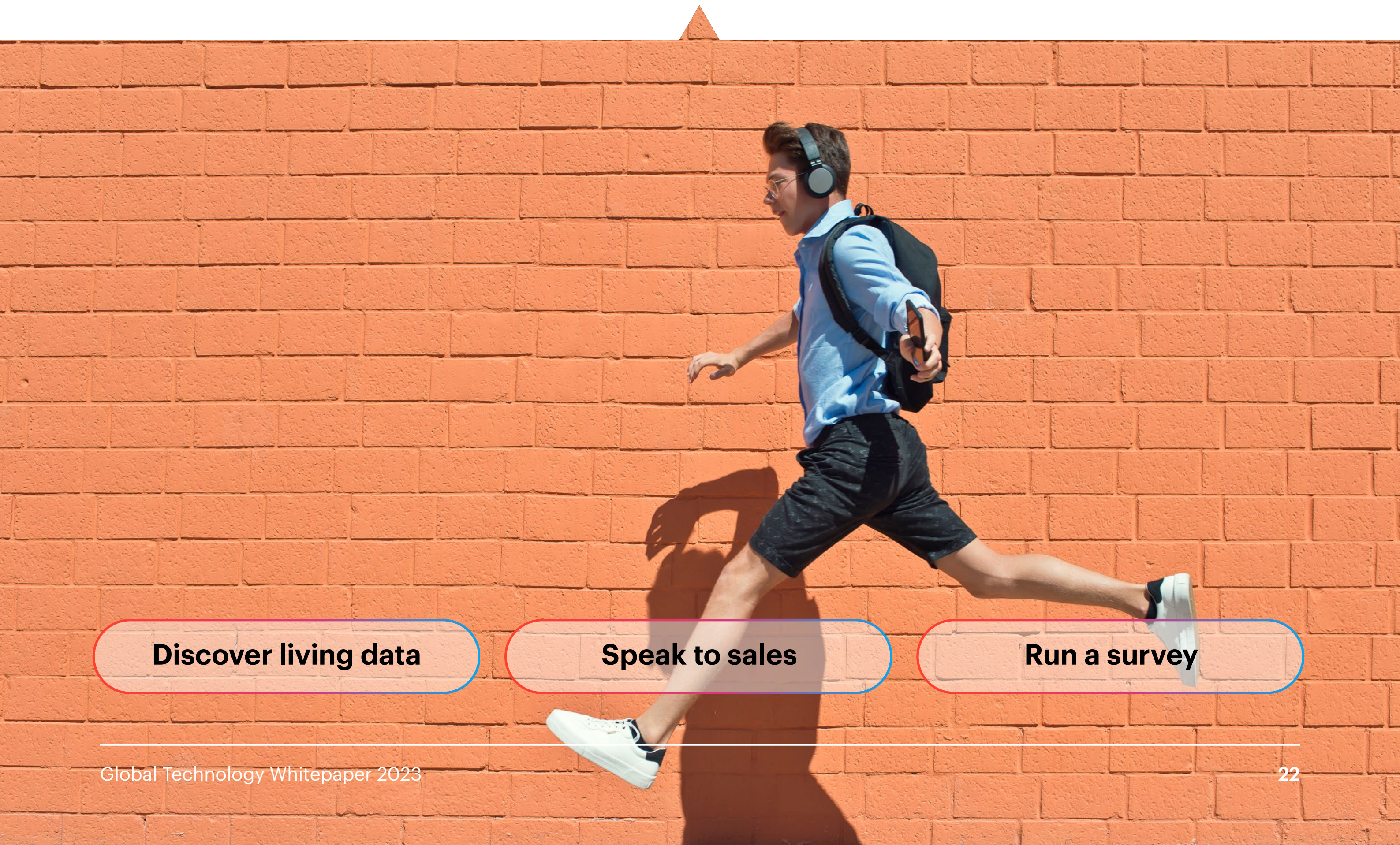
All age groups globally are equally as guilty of doing nothing with their old tech and storing it somewhere at home. In terms of selling, the Gen Z cohort in general, are more likely to want to sell items they no longer use on sites such as eBay or Vinted than older generations. Our research reveals that **18-24s** have the highest propensity to sell their old electronics goods **(36%)**, or trade in their old tech for an exchange or upgrade **(27%)**, significantly higher than those aged **55+**. This could be driven by their desire to have the latest and newest models while offsetting the cost by using a trade in scheme. This could also be driven by wanting to act more sustainably and provide their old tech with a new life.



What happens to electronics no longer needed by age? (Global)	Global total	18-24	25-34	35-44	45-54	55+
Store them in my home (drawer, cupboard, basement etc.)	**38%**	41%	39%	39%	36%	35%
Pass on to others (family members, friends etc.)	**36%**	38%	37%	36%	37%	33%
Sell them	**28%**	36%	32%	32%	29%	19%
Use a recycling service	**26%**	19%	21%	24%	25%	34%
Trade in for an exchange/upgrade	**21%**	27%	25%	23%	22%	16%
Give to a charity shop	**12%**	11%	13%	12%	11%	13%
Use a repair, refurbishing service	**11%**	14%	14%	13%	11%	8%
Throw them away	**11%**	9%	11%	12%	11%	10%

Q: What do you tend to do with the electronics products you own (laptops, smartphones, cameras, games consoles, etc.) when you no longer need them?

All age groups are open to passing on their old tech to others, or donating to a charity shop, with **18-24s** once again over indexing compared to other cohorts. Recycling, reusing, and refurbishing of electronics materials are core elements in the reduction of e-waste and contributing to a circular economy where resources are made into products, reused, and recycled multiple times.



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Denmark leads the way for using a recycling service

So, which countries are more open to recycling, refurbishing, and trading-in their old tech? Our data shows that more than four in ten **(42%)** Danes used a recycling service for the disposal of their old electronics products, Canadians and Australians followed with **37%** and **34%** respectively.
Not only is Denmark one of the most digitally advanced countries in Europe, but it also has the most established sustainability footprint in the world.

Asian markets are more open to trade-in deals to exchange or upgrade their old products with Indonesia, China and India leading. Consumers in India, UAE and Mexico are most likely to use repair and refurbishing services.

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What happens to electronics no longer needed by country?

Q: What do you tend to do with the electronics products you own (laptops, smartphones, cameras, games consoles, etc.) when you no longer need them?

As we have seen earlier, when focusing specifically on what happens to electronics products that are no longer needed only one in ten globally have used a repair, or refurbishing service. But overall, are consumers interested in buying refurbished/recycled electronics, and what can be done to encourage consumers to purchase refurbished technology?

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Marketer insight

It will be very interesting for marketers to understand why people tend to hold on to their old devices. Sentimental value? Little knowledge of recycling options? Fear of losing their data? It surely looks like a great opportunity for companies to promote sustainable solutions for this large amount of electronic goods.

From raising awareness about recycling, to promoting cloud services to save and store personal data, many hardware and software organisations in the sector could benefit from creating programmes addressing this issue.

Tech Reboot

YouGov research reveals that there is an appetite for buying refurbished electronics with more than two thirds **(69%)** of consumers across the globe who have either already bought a refurbished/recycled electronics item while **(28%)** or would consider buying one **(41%)**. In contrast, one in three are not open at all to the idea of buying pre-used technology and would never consider it.

Purchasing of refurbished/recycled electronics products (Global)

Refurb purchasers | **28%**
Refurb considerers | **41%**
Refurb rejecters | **31%**

Q: Thinking now about refurbished electronics products (e.g., cell phones, laptops, smart watches, etc.), which of the following best describes you?

Refurb purchasers: I have purchased refurbished/recycled electronics products. 12:37 pm

Refurb considerers: I have never purchased refurbished electronics/recycled products, but would consider it. 12:38 pm

Refurb rejecters: I have never purchased refurbished/recycled electronics products, and would never consider it. 12:39 pm

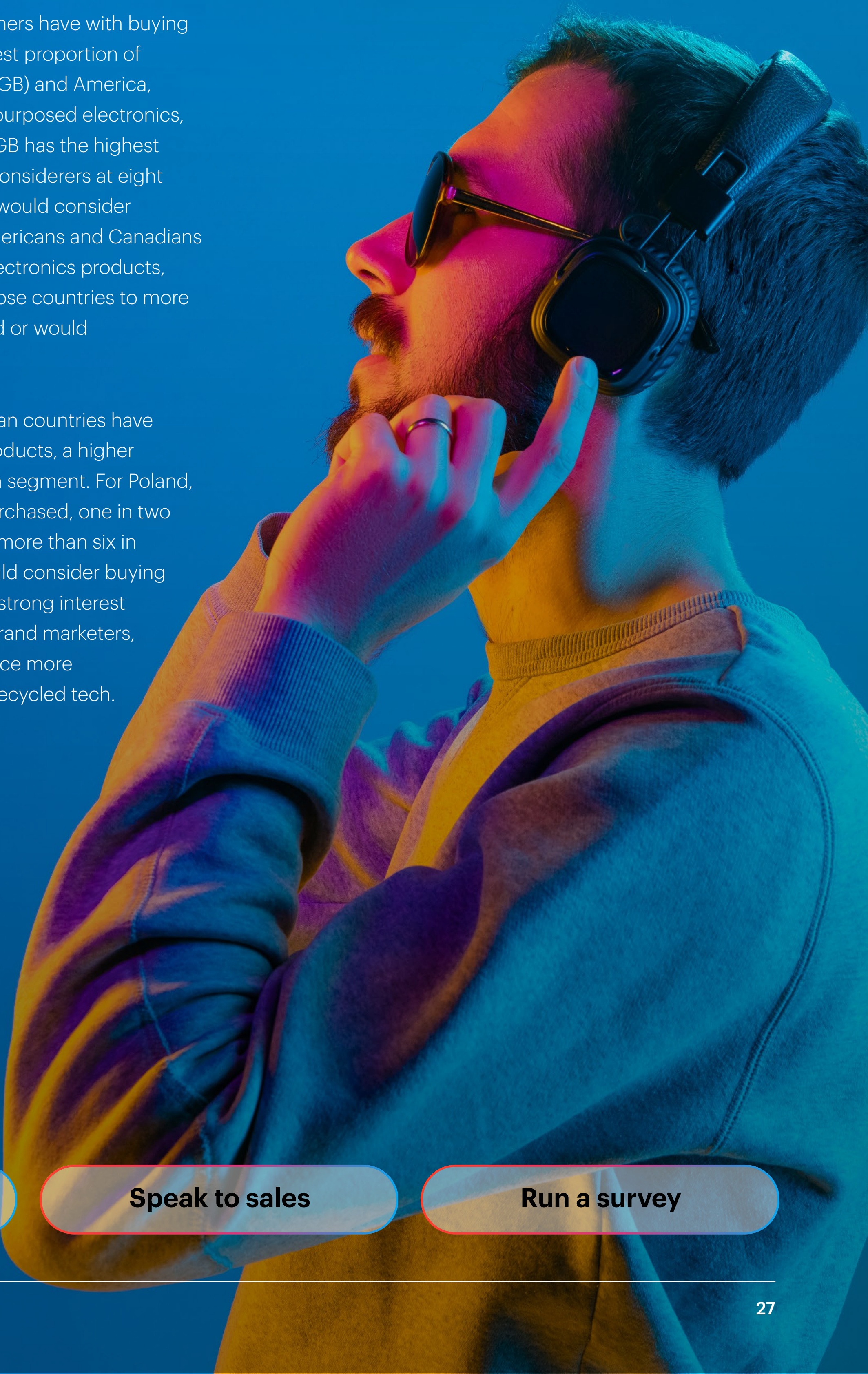
Many carriers, cell phone manufacturers and specialist phone retailers sell refurbished phones. In addition, you can also buy them from auction sites such as eBay, high-street retailers, and specialist resale-and-recycle sites, such as Envirofone. Amazon sells refurbished electronics products via Amazon Renewed and Amazon Warehouse. Large tech brands such as Dell, Apple, HP, and Samsung all use Amazon Renewed.

All are offering lots of choice for consumers to save money and help the planet. In addition, as the cost of living crisis escalates across the regions, it is likely that demand for refurbished electronics goods will continue to grow.

Brits and Americans have purchased the most refurbished electronics products

Exploring the relationship that consumers have with buying refurbished tech by country, the highest proportion of refurb buyers fall within Great Britain (GB) and America, with around four in ten purchasing repurposed electronics, closely followed by Canada. Overall, GB has the highest proportion of purchasers and refurb considerers at eight in ten (41% have purchased, and 39% would consider purchasing). In addition, a third of Americans and Canadians would consider buying refurbished electronics products, pushing the engagement score for those countries to more than seven in ten who have purchased or would consider purchasing.

While less than a third in most European countries have purchased refurbished electronics products, a higher proportion sit within the consideration segment. For Poland, although less than one in five have purchased, one in two would consider. Across all 18 markets more than six in ten have either already bought or would consider buying refurbished electronics, suggesting a strong interest overall, as well as an opportunity for brand marketers, manufacturers, and retailers to convince more consumers of the benefits of buying recycled tech.



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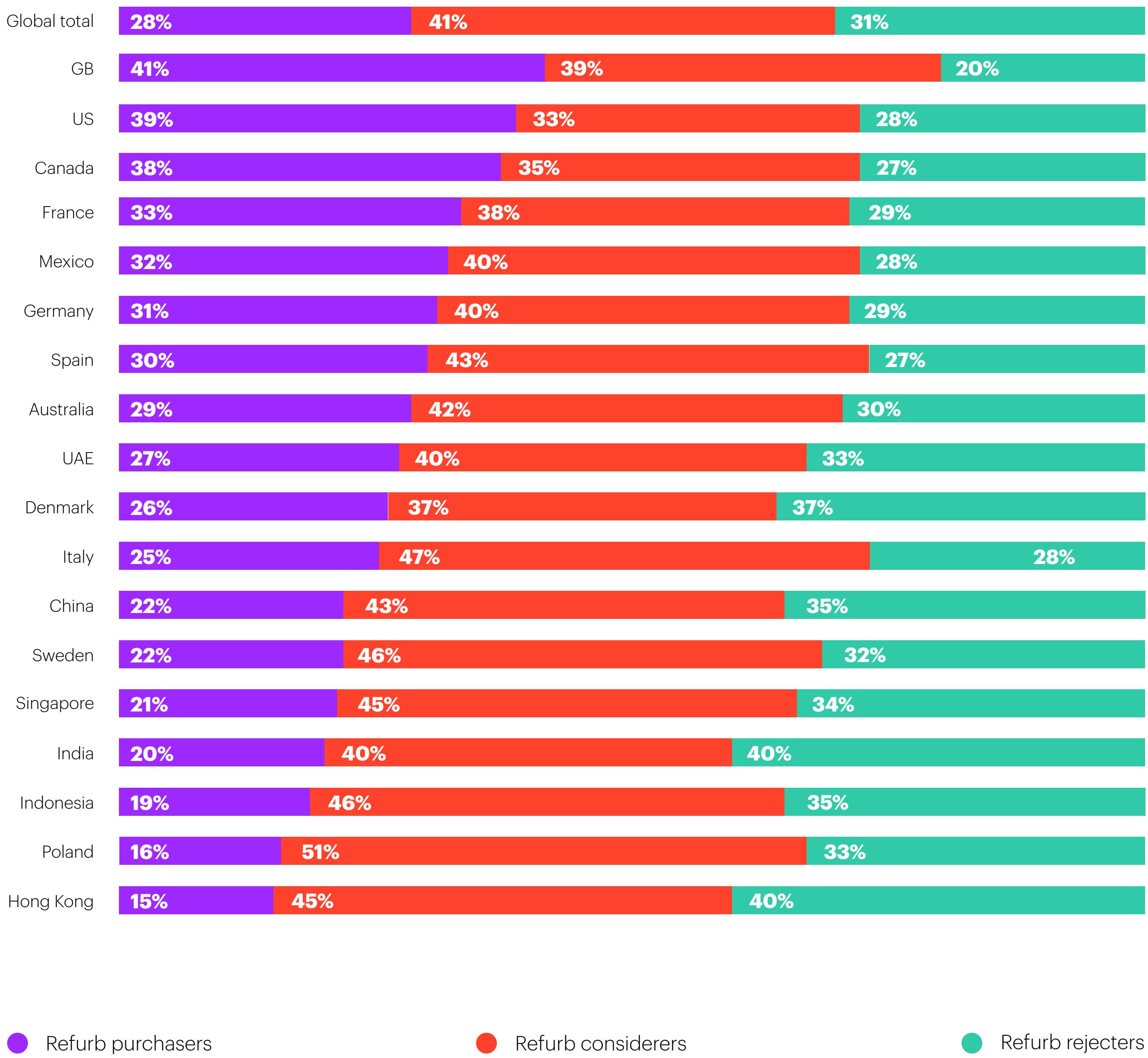
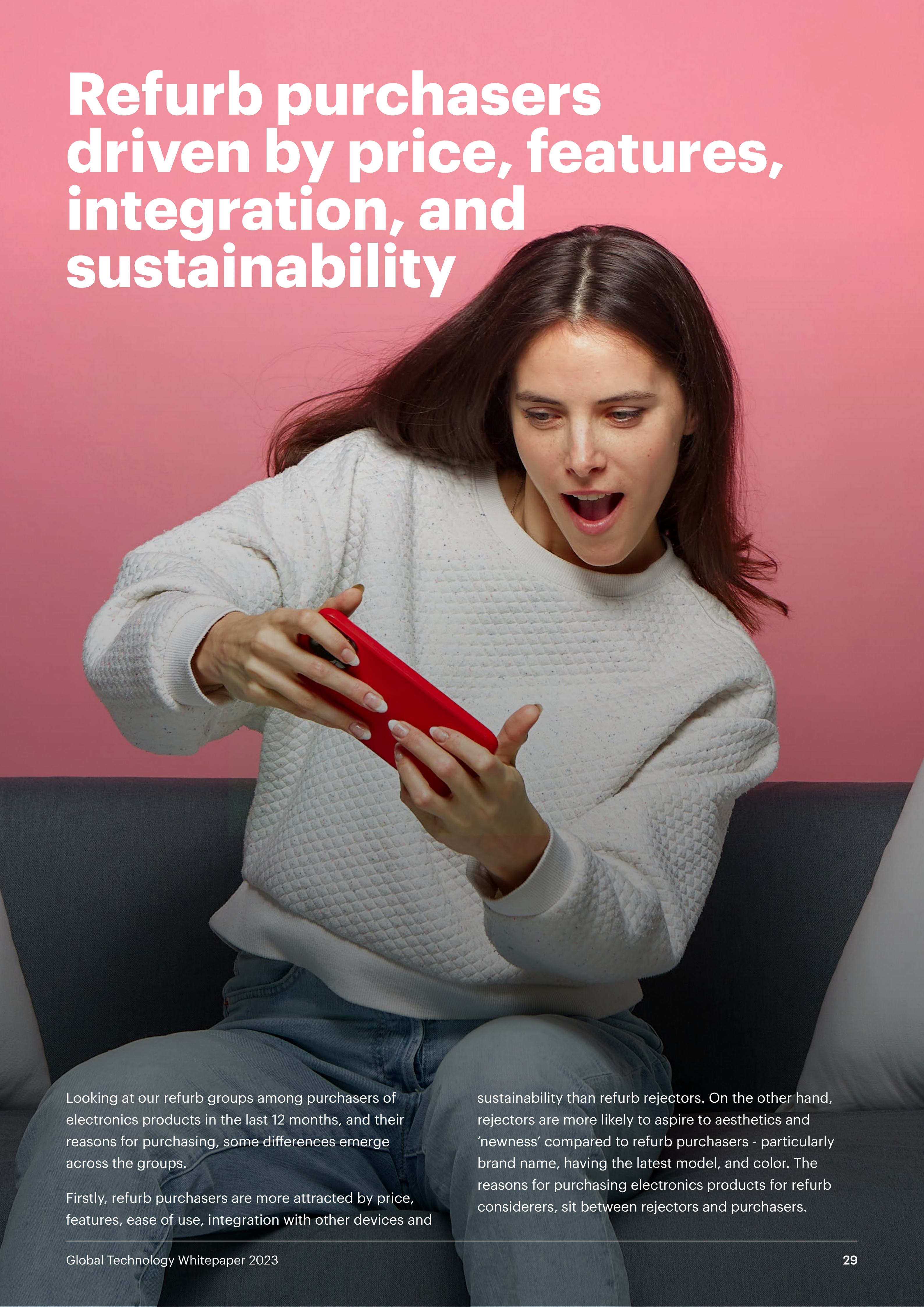
Purchasing of refurbished/ recycled electronics products by country



Q: Thinking now about refurbished electronic products (e.g., cell phones, laptops, smart watches, etc.), which of the following best describes you?

Refurb purchasers driven by price, features, integration, and sustainability



Looking at our refurb groups among purchasers of electronics products in the last 12 months, and their reasons for purchasing, some differences emerge across the groups.

Firstly, refurb purchasers are more attracted by price, features, ease of use, integration with other devices and sustainability than refurb rejectors. On the other hand, rejectors are more likely to aspire to aesthetics and ‘newness’ compared to refurb purchasers - particularly brand name, having the latest model, and color. The reasons for purchasing electronics products for refurb considerers, sit between rejectors and purchasers.

Purchasing of refurbished/recycled electronics products by reasons for purchasing in the last 12 months (Global)			
	Refurb rejecters	Refurb considerers	Refurb purchasers
Price	58%	66%	67%
Features available	44%	49%	51%
Ease of use	41%	45%	44%
Brand name	42%	37%	36%
Design	30%	30%	29%
Integration with other devices	22%	24%	27%
The latest model	25%	21%	20%
Privacy/security and data protection	20%	20%	21%
Color	18%	15%	14%
Sustainable/environmentally friendly	12%	14%	15%

Q: Thinking now about refurbished electronics products (e.g., cell phones, laptops, smart watches, etc.), which of the following best describes you?
Q: Thinking back to when you bought, which of the following reasons were most important to you?
Base: Those who have purchased the electronics product in the last year.

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Factors to encourage buying refurbished electronics

In working towards a circular economy for consumer electronics, it is important for marketers and OEMs to understand which tactics could be adopted to encourage more consumers to buy recycled tech. As we have highlighted earlier, the desire to buy electronics that are more sustainable has increased in importance.

And although four in ten would consider purchasing a recycled device, only a lower proportion **(28%)** have already done so, and a third would never consider it. So, what could help convert the considerers or the rejecters along the path to purchasing recycled electronics?

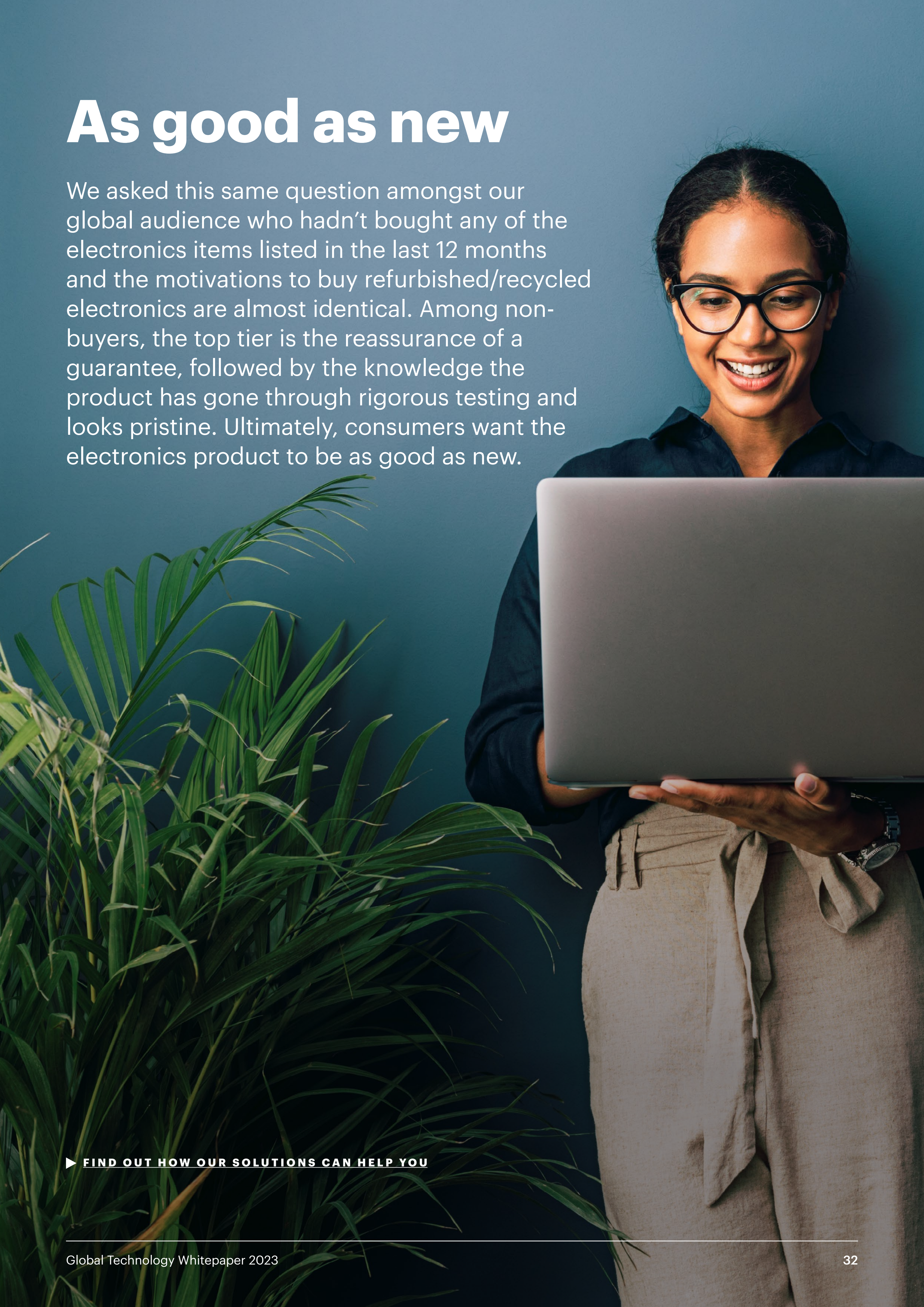
Guarantee me!

Among global consumers who have purchased electronics devices in the last 12 months, the reassurance of the product being guaranteed for at least a year is most likely to encourage them to buy recycled or refurbished products, followed by pristine condition and rigorous testing. Cell phone buyers are more likely to consider purchasing a recycled item if there is a one-year guarantee **(39%)** and pristine condition **(35%)** than purchasers of other electronics goods. Laptop/desktop purchasers on the other hand score highest for rigorous testing **(36%)** and purchasers of games consoles are more likely to consider a recycled item with a **25%** reduction **(34%)** than purchasers of other electronics products.

Factors that encourage global consumers to buy refurbished/recylcled electronics products among those who have bought electronics products in the last 12 months (Global)

	Any electronic product bought in the last 12 months	TVs	Cell phones/ Smartphones	Laptops/ Desktops	Games consoles	Tablets	Smart watches	Smart fitness devices	Smart speakers
One year guarantee	36%	38%	39%	36%	31%	35%	36%	29%	32%
If the item is in pristine condition	33%	32%	35%	32%	30%	32%	33%	28%	34%
Knowing it has gone through rigorous testing	33%	32%	33%	36%	29%	33%	32%	31%	33%
If the price of the item is 25% reduction of the brand new item	31%	30%	31%	31%	34%	30%	32%	30%	29%
Buying from a reputable seller	29%	27%	30%	30%	28%	30%	26%	30%	27%
If it included all the relevant accessories (e.g., Cable, charger, etc.)	23%	22%	21%	23%	25%	24%	24%	25%	23%
If I could see the item I'm buying beforehand	20%	21%	21%	20%	21%	20%	20%	22%	20%
If the item shows zero usage	16%	16%	15%	15%	15%	16%	18%	18%	17%
Knowing it is more eco-friendly	15%	14%	13%	13%	17%	15%	15%	19%	17%
If the item is boxed with instructions etc.	12%	11%	10%	10%	15%	13%	11%	17%	14%

Q: Refurbished/recycled electronics goods either extract and reuse the materials in the same product or the components in working condition are reused in new products. Which, if any, of the following would MOST encourage you to buy refurbished/ recycled products. Base: Those who have purchased an electronics product in the last year.

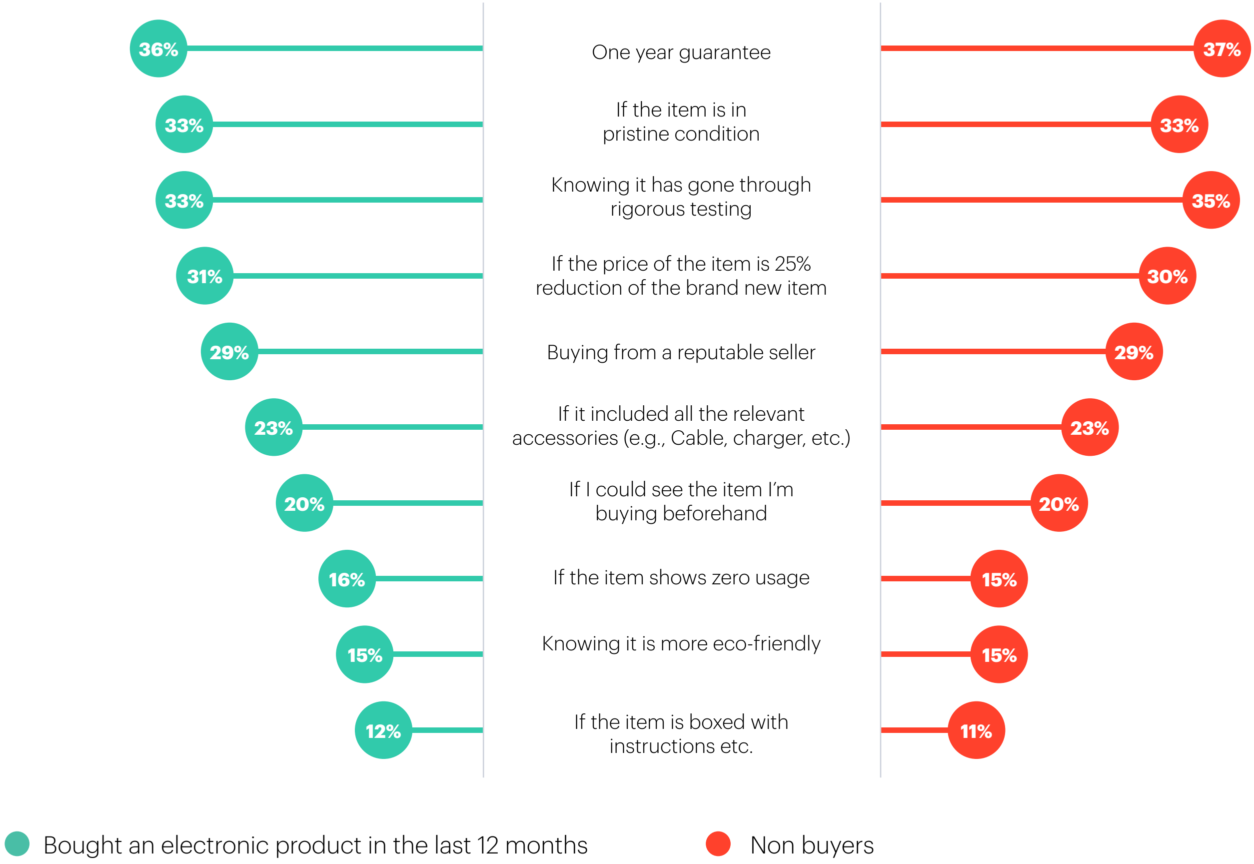


As good as new

We asked this same question amongst our global audience who hadn't bought any of the electronics items listed in the last 12 months and the motivations to buy refurbished/recycled electronics are almost identical. Among non-buyers, the top tier is the reassurance of a guarantee, followed by the knowledge the product has gone through rigorous testing and looks pristine. Ultimately, consumers want the electronics product to be as good as new.

▶ **FIND OUT HOW OUR SOLUTIONS CAN HELP YOU**

Factors that could encourage global consumers to buy refurbished/recycled electronics products among those who have NOT bought electronics products in the last 12 months (Global)



Q: Refurbished/recycled electronics goods either extract and reuse the materials in the same product or the components in working condition are reused in new products. Which, if any, of the following would MOST encourage you to buy refurbished/recycled products.

Communicating the cost-benefits of repurposed tech, in conjunction with the quality reassurance of the product, will be key elements for brand manufacturers and retailers to focus their marketing messages about refurbishment on, in order to nudge consumers to buy.

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Younger consumers looking for a good deal on recycled tech

It’s important to understand if different tactics appeal to different age groups. Comparing motivations by age, global consumers in the older 55+ cohort are more likely to be enticed by the one-year guarantee and the rigorous testing procedure, whereas the top motivator for 18–24-year-olds is the **25%** price reduction, followed by pristine condition. Younger adults are also more likely to be motivated by its green credentials. In comparison, the price reduction is less appealing to the over 55s, but they are more likely to need reassurances, scoring more highly than those in younger cohorts for one-year guarantee, rigorous testing, reputable seller, containing instructions and relevant accessories. This data confirms the need to devise different marketing strategies and messaging to appeal to different audiences.

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Factors that could encourage global consumers to buy refurbished/recycled electronics products by age (Global)						
	Global total	18-24	25-34	35-44	45-54	55+
One year guarantee	**37%**	26%	33%	38%	40%	41%
Knowing it has gone through rigorous testing	**35%**	32%	31%	33%	34%	39%
If the item is in pristine condition	**33%**	34%	35%	34%	33%	31%
If the price of the item is 25% reduction of the brand new item	**30%**	36%	33%	33%	30%	25%
Buying from a reputable seller	**29%**	28%	30%	27%	27%	31%
If it included all the relevant accessories (e.g., Cable, charger, etc.)	**23%**	22%	21%	20%	22%	26%
If I could see the item I'm buying beforehand	**20%**	24%	18%	17%	17%	21%
If the item shows zero usage	**15%**	15%	16%	16%	17%	13%
Knowing it is more eco-friendly	**14%**	18%	15%	14%	15%	12%
If the item is boxed with instructions etc.	**11%**	8%	8%	9%	10%	14%

Q: Refurbished/recycled electronics goods either extract and reuse the materials in the same product or the components in working condition are reused in new products. Which, if any, of the following would MOST encourage you to buy refurbished/recycled products.

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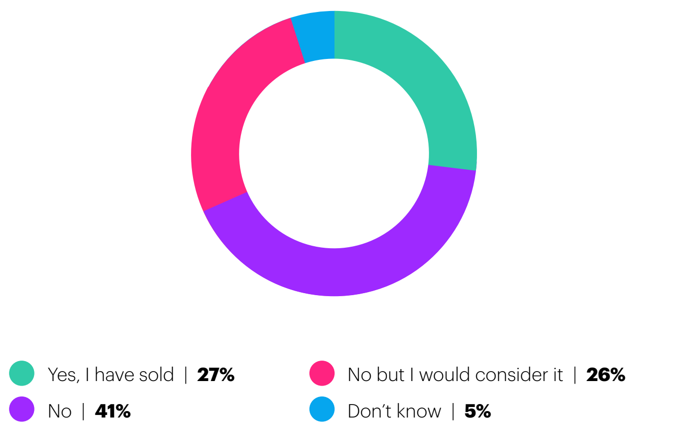
The resell market (sell, sell, sell)

As highlighted earlier, sustainability and being more eco-friendly is increasing in importance among future electronics goods buyers, but price remains the primary driver for past and future purchasers. Focusing on the resell market, a quarter of global consumers have sold a consumer electronics device to raise money towards buying a new product, and a similar proportion haven't but would consider reselling.

Selling of consumer electronics | Global total



Q: Have you ever sold a consumer electronics device in order to get money off a new consumer product?

Reselling old devices is another key component of the circular economy of electronics goods and OEMs and retailers should encourage consumers to recycle their electronics devices, trading them in for cash, or contributing towards an upgrade. These options expand the lifespan of these items and reduce the impact on the environment.

The resell market might be seen as a threat for manufacturers, as it decreases volume of new devices sold. However, considering that this is an established trend, and keeping in mind that for this sector price is the main driver of choice, a focus on the trade-in programmes and a better offering in that space would greatly benefit the bottom line of OEMs while also improving their sustainability credentials.

YouGov

Living Consumer Intelligence

CASE STUDY

Back Market

How Back Market tracked the impact of their media plan and rebranding with YouGov

Business challenge

Enhance Back Market's reputation during a rebrand while retaining existing customers.

Solution

YouGov's living data, via a combination of a custom tracker, YouGov Profiles and YouGov BrandIndex.

Results

A significant increase in brand awareness, leading to further expansion into new markets.

BUSINESS CHALLENGE

A young and ambitious company, Back Market (BM) had changed its visual identity in early 2020, using YouGov RealTime research to assess its impact on their existing brand awareness.

In 2021, BM's challenge was to quickly build their brand awareness in several new global markets via effective media campaigns, while still appealing to the core customers and prospects they had gained before their rebrand.

This meant that BM needed to continuously monitor their global brand awareness and assess the impact of their media campaigns in each market. In particular, they wanted to evaluate the performance of their German campaign and apply any additional learnings to their French and Spanish campaigns.

SOLUTION

YouGov provided BM with a custom brand tracker that included one Aided Awareness measurement per month. BM decided to expand their tracking to include multiple metrics for an even greater depth of insight into how their campaigns were performing locally and internationally, and at both ends of the product funnel.

To facilitate this, BM subscribed to YouGov Profiles and BrandIndex; two powerful data intelligence tools which can be used together to build a holistic profile of consumers, target them with precision, and then closely monitor how they respond to brand communications and campaigns.

YouGov BrandIndex empowered BM to track all of their Key Performance Indicators continuously, while YouGov Profiles enabled them to understand their target audiences across each key market in granular detail, as well as the most effective ways to reach them with their media campaigns.

BM used their combined subscription to monitor their brand awareness and track the direct impact of their campaigns. BM was able to understand why replicating the successful French campaign did not resonate as effectively for the German market, and subsequently identify which elements of the content were deemed less relevant and needed to be altered for the local audience.

RESULTS

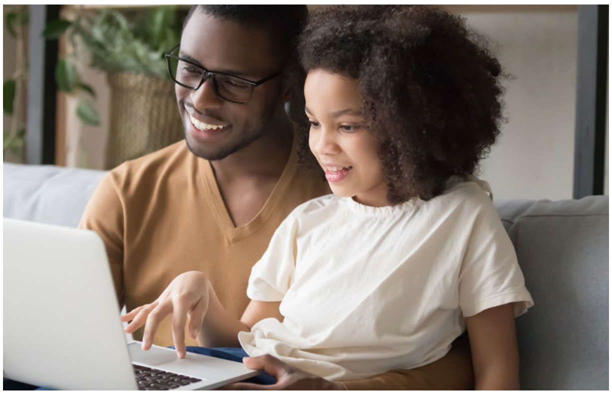
In the first year of their YouGov BrandIndex subscription in France, BM made significant gains in brand awareness: +13pts among National Population and approximately +20pts against their media target.

As BM operates in multiple markets, YouGov co-ordinates a multi-country analysis for them, as well as delivering a newsletter of client updates. These insights enable BM to easily monitor and understand their business evolution over time.

BM have now directly integrated YouGov BrandIndex with their internal tools to drive the business with greater efficiency, and continue to use as they expand their reach into new global markets.

"Thanks to its rich and agile connected tools, YouGov has quickly been identified as a key partner in Back Market's local and international development. Additionally, the quality of the client service enables our teams across the globe to drive our business with the freshest and most reliable data on the market."

GUILLAUME ROUBY
CMO of Back Market



YouGov is an international research data and analytics group. We have been building an ever-growing source of consumer data for over 20 years, creating the richest and most complete understanding of your customers' complex lives. We call it living data. Understand what 22 million+ registered panel members in over 55 markets are thinking, on over a million - and growing - data points. Re-contact and dig deeper to plan, activate and track marketing activity with certainty, at speed, every time. Living Consumer Intelligence.

Focus on eSIM

An eSIM is a built-in version of the traditional smartphone SIM card. They are becoming more common, in fact, Apple is doubling down on this feature by doing away with the infrastructure to support physical SIM cards. The US version of the iPhone 14 only supports eSIM and doesn't have a physical SIM tray. Apple isn't the first to use eSIM, it is likely that more smartphone manufacturers will follow in its footsteps, especially as they are a more sustainable and environmentally friendly option than traditional plastic SIM cards. But how many global consumers are aware of them, and how many have already used them?

Unplugging the potential of eSIMs

YouGov research finds that less than one in ten global consumers currently use or have used an eSIM **(9%)**, and a quarter have heard of them, but have never used them. Almost two thirds of global consumers **(65%)** have never heard of eSIMs, but **20%** of them state that they would like to know more. Notably, awareness of eSims is stronger among under 55s than over 55s, and the over 55 cohort are less likely to have used, or consider using them.

As more and more cell phone brands support eSIM, and many network providers now offer eSIM options, the low awareness data suggests a need for improved communication from both OEMs and providers. Identifying interested segments and creating campaigns promoting this technology would benefit both sides of the tech world and decreasing use of physical SIMs would also benefit the planet. The increased promotion of eSIMS also presents a favorable sustainable image of OEMs in the minds of consumers.

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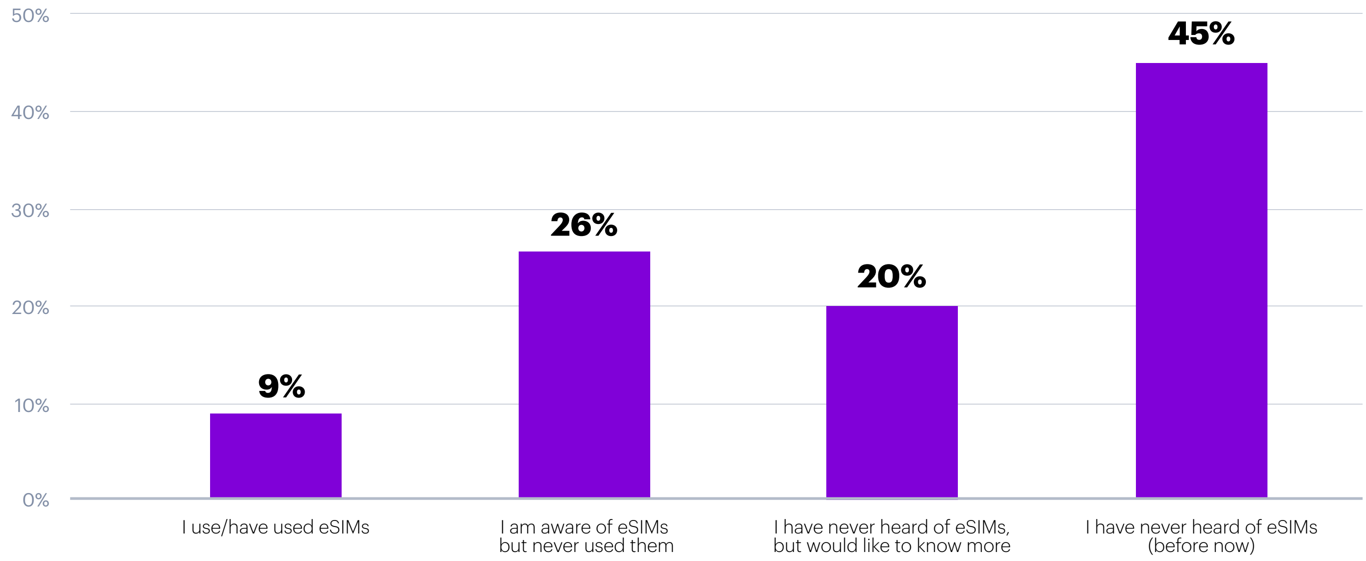
Awareness and use of eSIMs (Global)

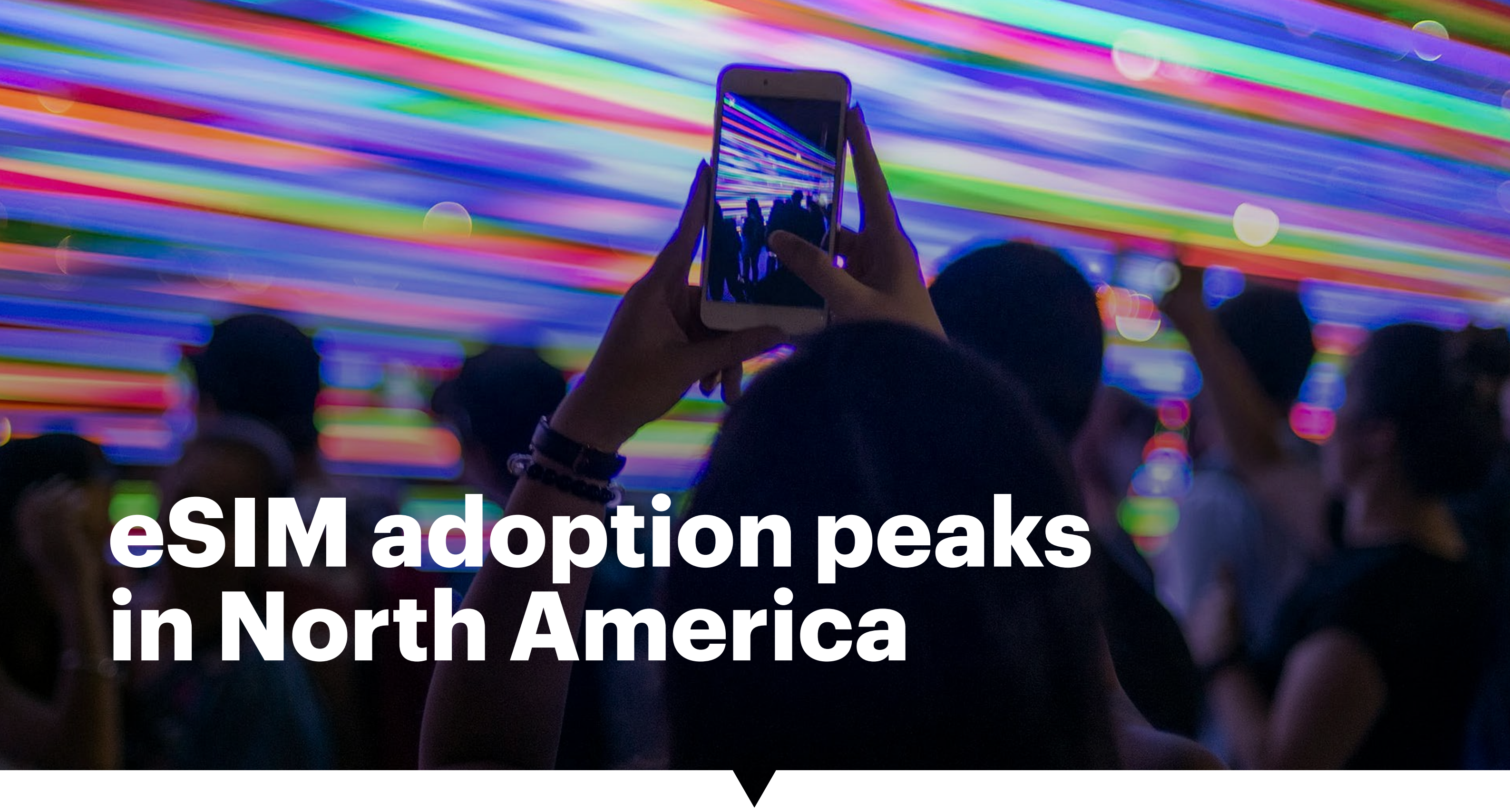


Q: An eSIM is a digital SIM card that is included in many cell phone models since 2018 and is becoming the new standard in SIM technology. It allows you to activate a mobile data plan from a network provider without having to use a physical SIM. You can use eSIM alongside your existing physical SIM card. Which applies to you?

Awareness and use of eSIMs (Global)

	Global Total	18-24	25-34	35-44	45-54	55+
I have never heard of eSIMs (before now)	**45%**	39%	39%	42%	43%	54%
I have never heard of eSIMs, but would like to know more	**20%**	23%	23%	20%	19%	17%
I am aware of eSIMs, but never used them	**26%**	28%	27%	28%	28%	22%
I use/have used eSIMS	**9%**	9%	10%	10%	10%	7%

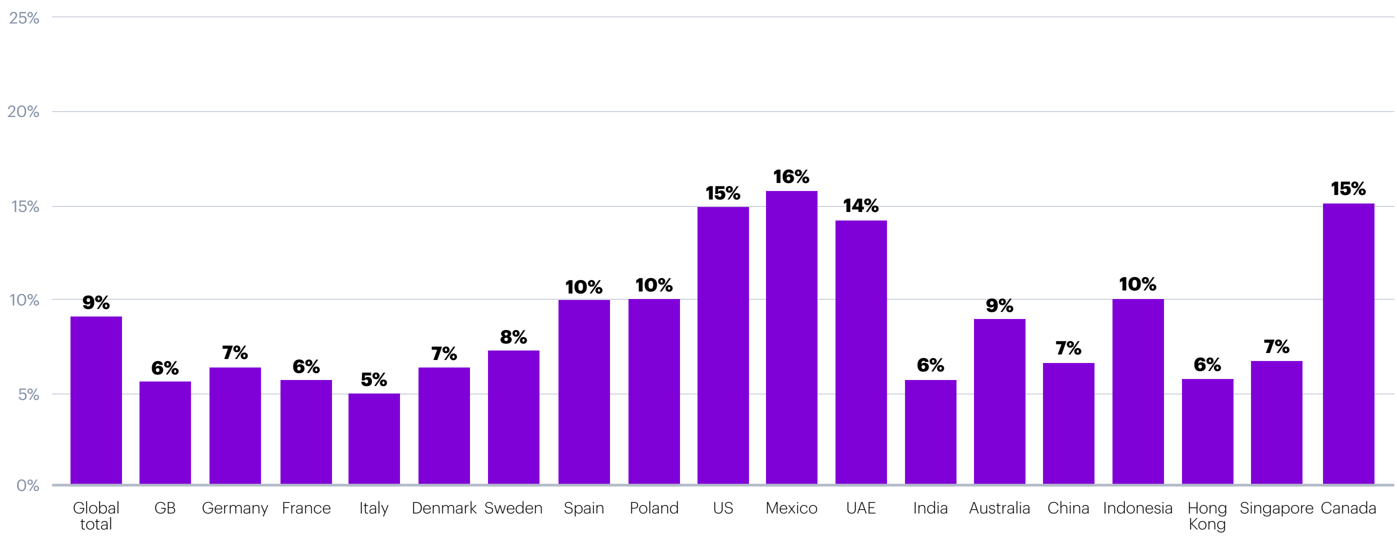
Q: An eSIM is a digital SIM card that is included in many cell phone models since 2018 and is becoming the new standard in SIM technology. It allows you to activate a mobile data plan from a network provider without having to use a physical SIM. You can use e-SIM alongside your existing physical SIM card. Which applies to you?



eSIM adoption peaks in North America

Comparing eSIM adoption by market, user penetrations are highest in North America, with around **15%** of Mexicans, Americans, and Canadians either currently using them, or having used them before. With the exception of Spain and Poland, usage levels are lower in many parts of Europe, particularly in Italy, GB and France. In Asia, Indonesia registers the highest proportion of users **(10%)**, with the lowest penetrations in India and Hong Kong **(both 6%)**.

Use of eSIMs by country



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PART - 3

Safe and secure

Global consumers are becoming increasingly concerned about data security and privacy with nearly half considering these important for future electronics purchases, ranking fourth in the purchase decision hierarchy.

Seven in ten concerned over data security and privacy

The practice of protecting digital information from unauthorized access, corruption, or theft is increasingly important to consumers. Our new data shows that less than one in ten **(9%)** global consumers are unconcerned about the security and privacy of their personal data. **70%** are concerned, with almost a third, 'very concerned' about data security and privacy. Overall, the proportion of those concerned, outweighs those who are not concerned 7 to 1.

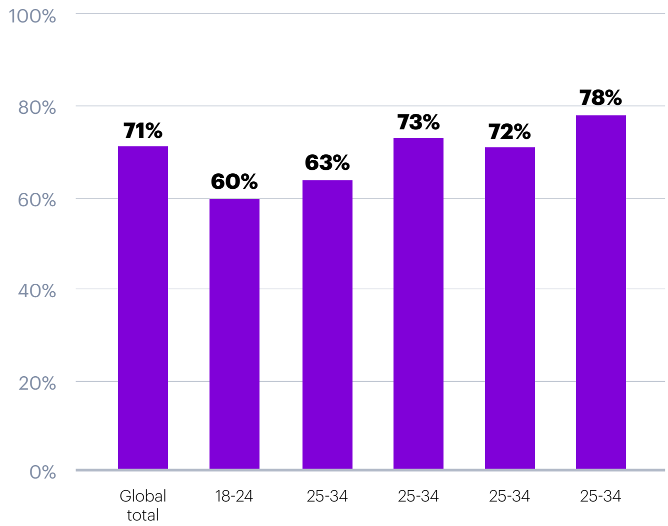
Level of concern around the security and privacy of your personal data | Global total

- Very concerned | **31%**
- Somewhat concerned | **39%**
- Neither concerned/unconcerned | **17%**
- Somewhat unconcerned | **7%**
- Not concerned at all | **2%**
- Don't know | **3%**

Older age groups have the highest levels of concern

Concern over the security and privacy of personal data is at its highest among the over 55s with more than three quarters **(78%)** expressing concern. Concern decreases with age, falling to six in ten among 18–24-year-olds.

% Concerned (very/somewhat) around the security and privacy of personal data by age (Global)



Q: What is your level of concern around the security and privacy of your personal data?

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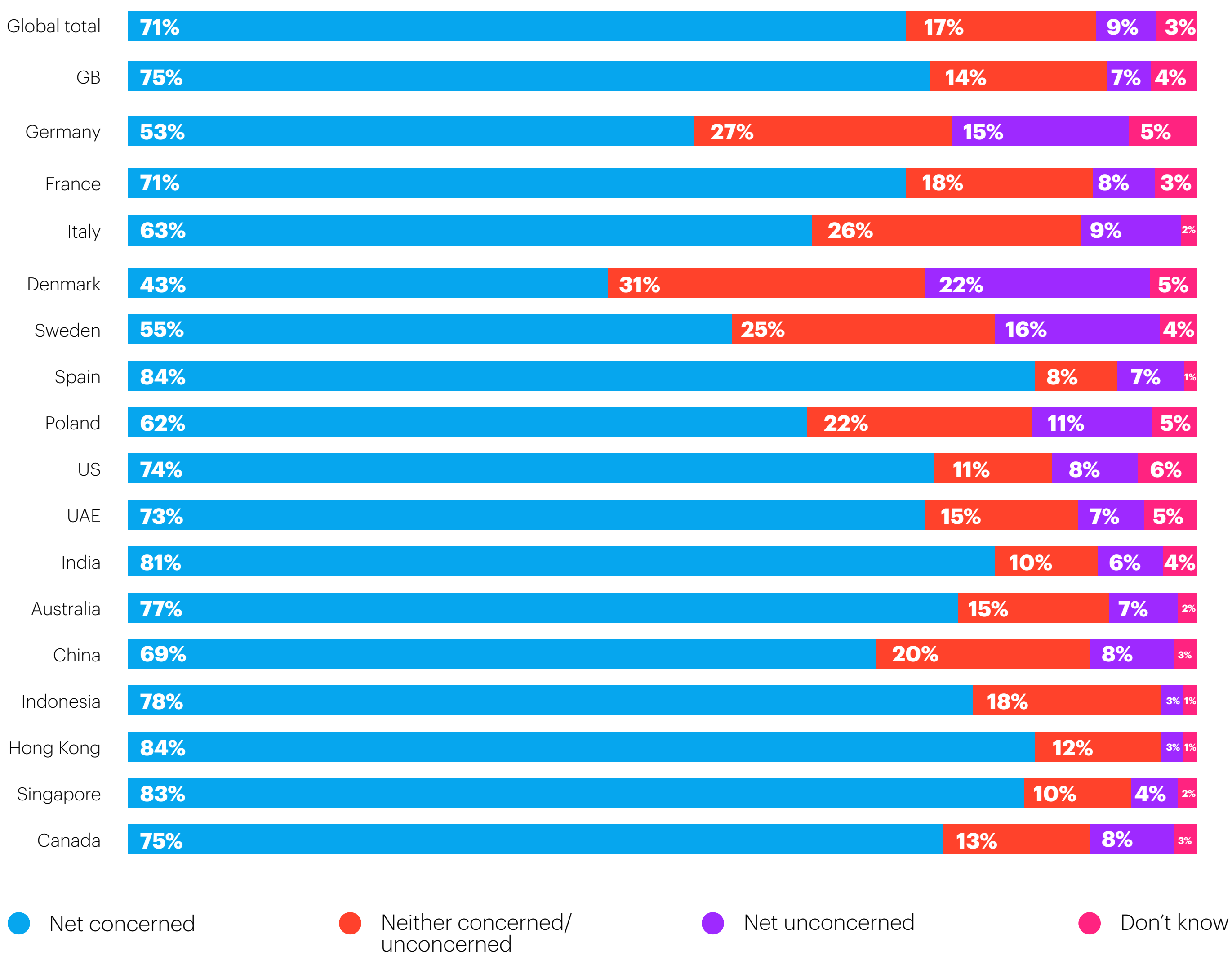
Looking at the data by country, in Europe, data security is more important to consumers in Spain **(84%)**, GB **(75%)** and France **(71%)**, while only four in ten Danes **(43%)** say they are concerned about data security.

Tech savvy Denmark registers the highest proportion of consumers who are not concerned out of all 18 international markets surveyed **(22%).** In Asia, concerns around the security and privacy of personal data are highest in Hong Kong **(84%)**, Singapore **(83%)** and India **(81%)**.

Level of concern around the security and privacy of your personal data by country



Q: What is your level of concern around the security and privacy of your personal data?

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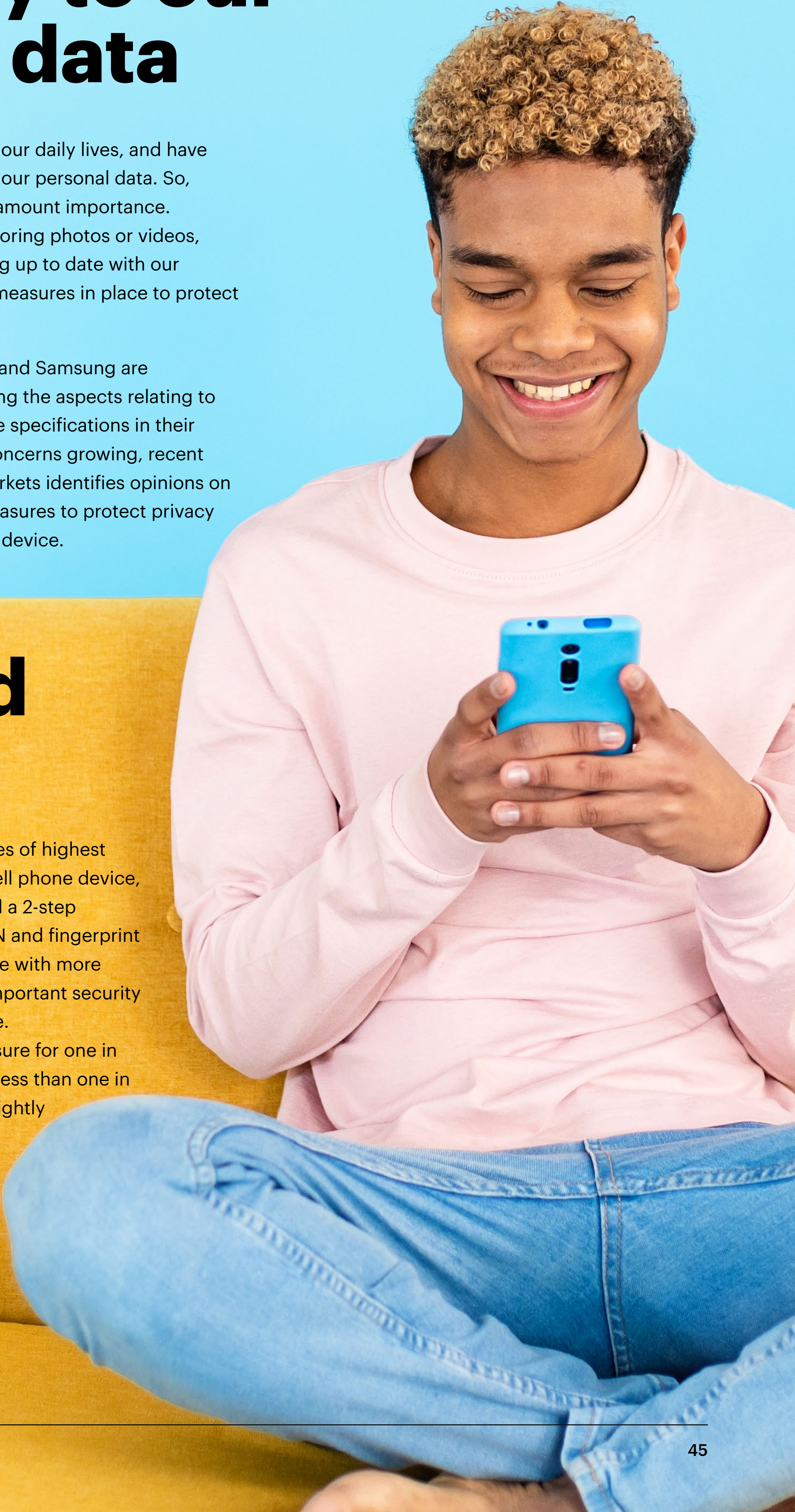
Smartphones, a gateway to our personal data

Our cell phones play an integral part in our daily lives, and have become the primary storage centre for our personal data. So, keeping them safe and secure is of paramount importance. Whether we are chatting, taking, and storing photos or videos, shopping online, paying bills, or keeping up to date with our finances and banking, having security measures in place to protect our personal data is key.

Many cell phone brands such as Apple and Samsung are increasingly focusing more on amplifying the aspects relating to security and privacy, rather than feature specifications in their marketing. With privacy and security concerns growing, recent YouGov data across 17 international markets identifies opinions on the importance of different security measures to protect privacy and keep data secure when selecting a device.

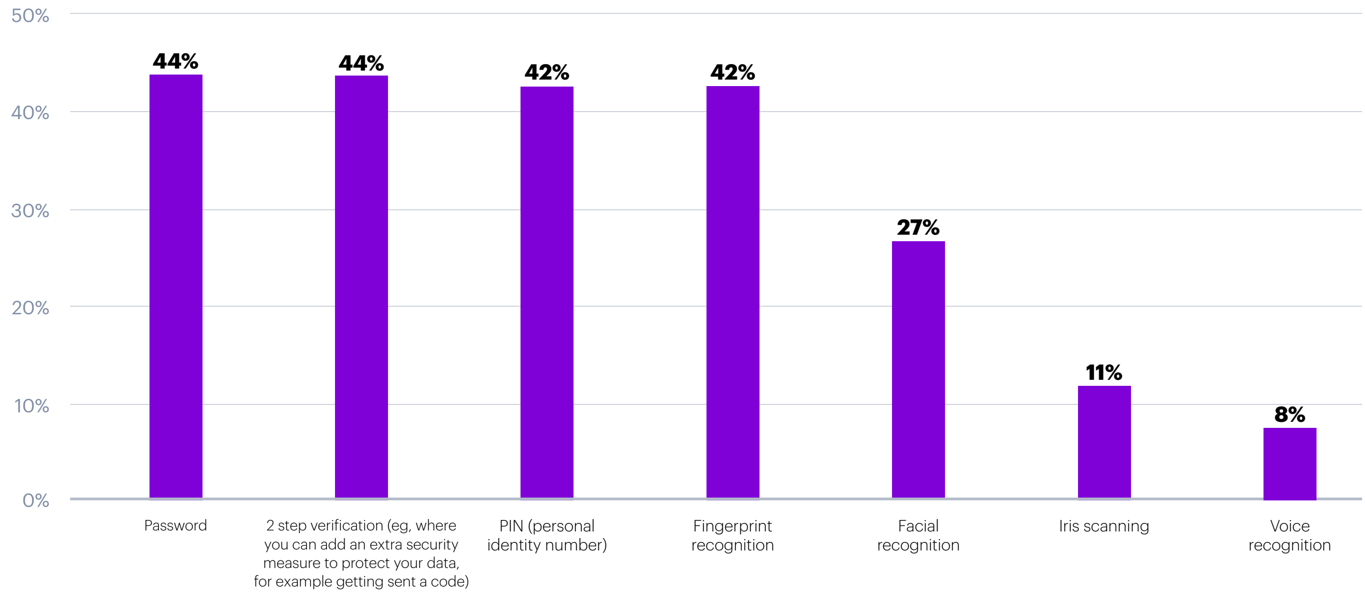


Password protect

When considering the security measures of highest importance during the selection of a cell phone device, global consumers place passwords and a 2-step verification in joint first place **(44%)**. PIN and fingerprint recognition closely follow in importance with more than four in ten highlighting them as important security measures to keep their cell phones safe.
Facial recognition is an important measure for one in four global consumers **(27%)**, whereas less than one in ten opted for voice recognition **(8%)**, slightly behind iris scanning **(11%)**.

▶ **EXPLORE MORE DATA**

Most important cell phone security measures when selecting a device (Global)



Q: Thinking about your cell phone specifically, which of the following security measures do you consider to be most important to protect your privacy and secure your data when selecting a device?

Younger more open to facial recognition

Looking at the important security measures by age, older consumers (55+) are less likely to want to consider facial recognition or iris scanning as an important security precaution, preferring to place their phone protection on remembering passwords or PINs. The 18-24s Gen Z cohort place higher importance on a two-factor authentication process, followed by fingerprint recognition, but are slightly more open to facial recognition, iris scanning and voice recognition security measures.

Most important cell phone security measures when selecting a device by age (Global)

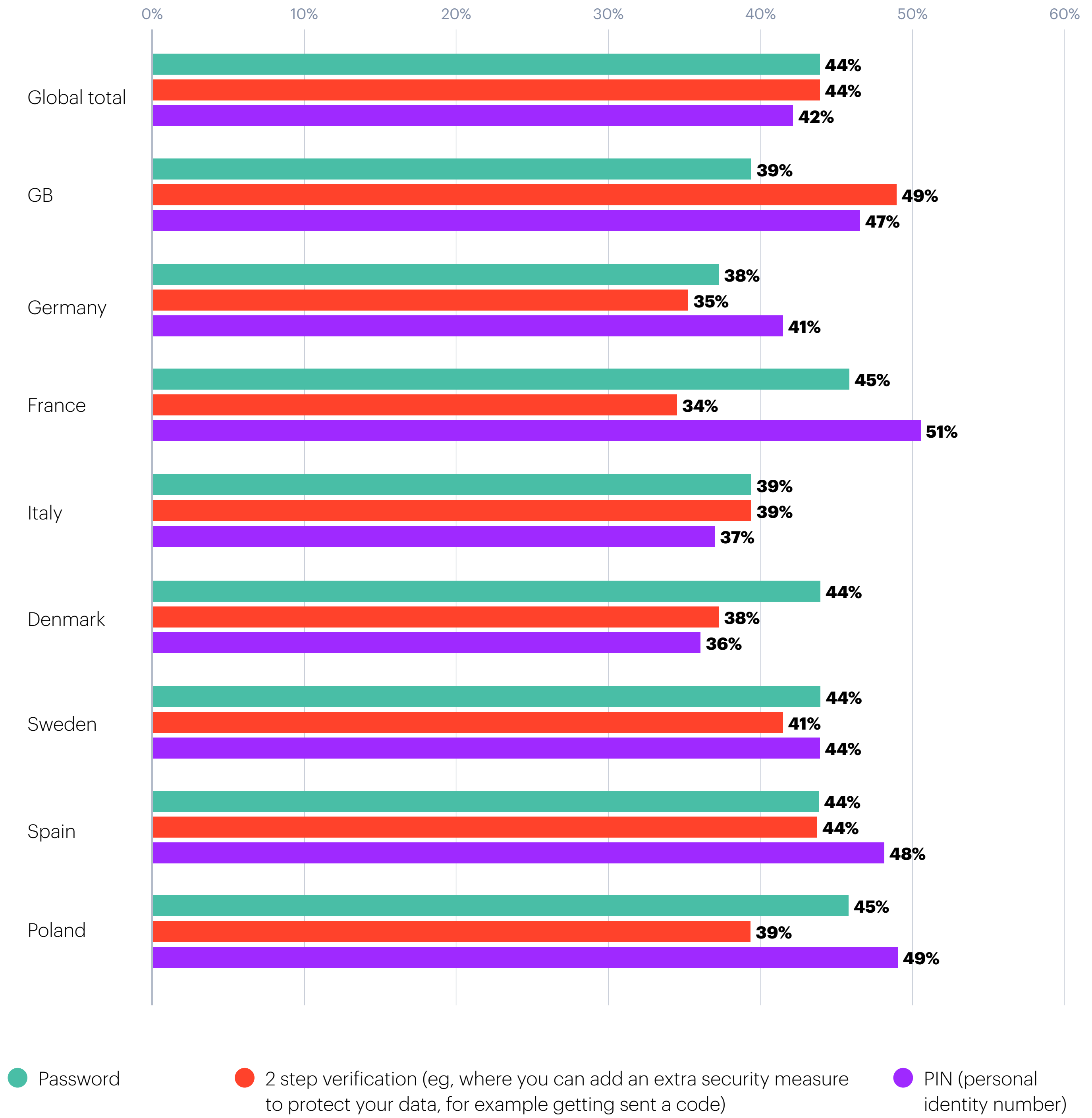
	Global total	18-24	25-34	35-44	45-54	55+
Password	**44%**	41%	42%	44%	44%	47%
2 step verification (eg, where you can add an extra security measure to protect your data, for example getting sent a code)	**44%**	46%	45%	45%	44%	41%
PIN (personal identity number)	**42%**	34%	37%	41%	43%	49%
Fingerprint recognition	**42%**	42%	41%	44%	44%	40%
Facial recognition	**27%**	32%	30%	30%	27%	21%
Iris scanning	**11%**	13%	12%	12%	11%	9%
Voice recognition	**8%**	11%	10%	8%	7%	6%

Q: Thinking about your cell phone specifically, which of the following security measures do you consider to be most important to protect your privacy and secure your data when selecting a device?

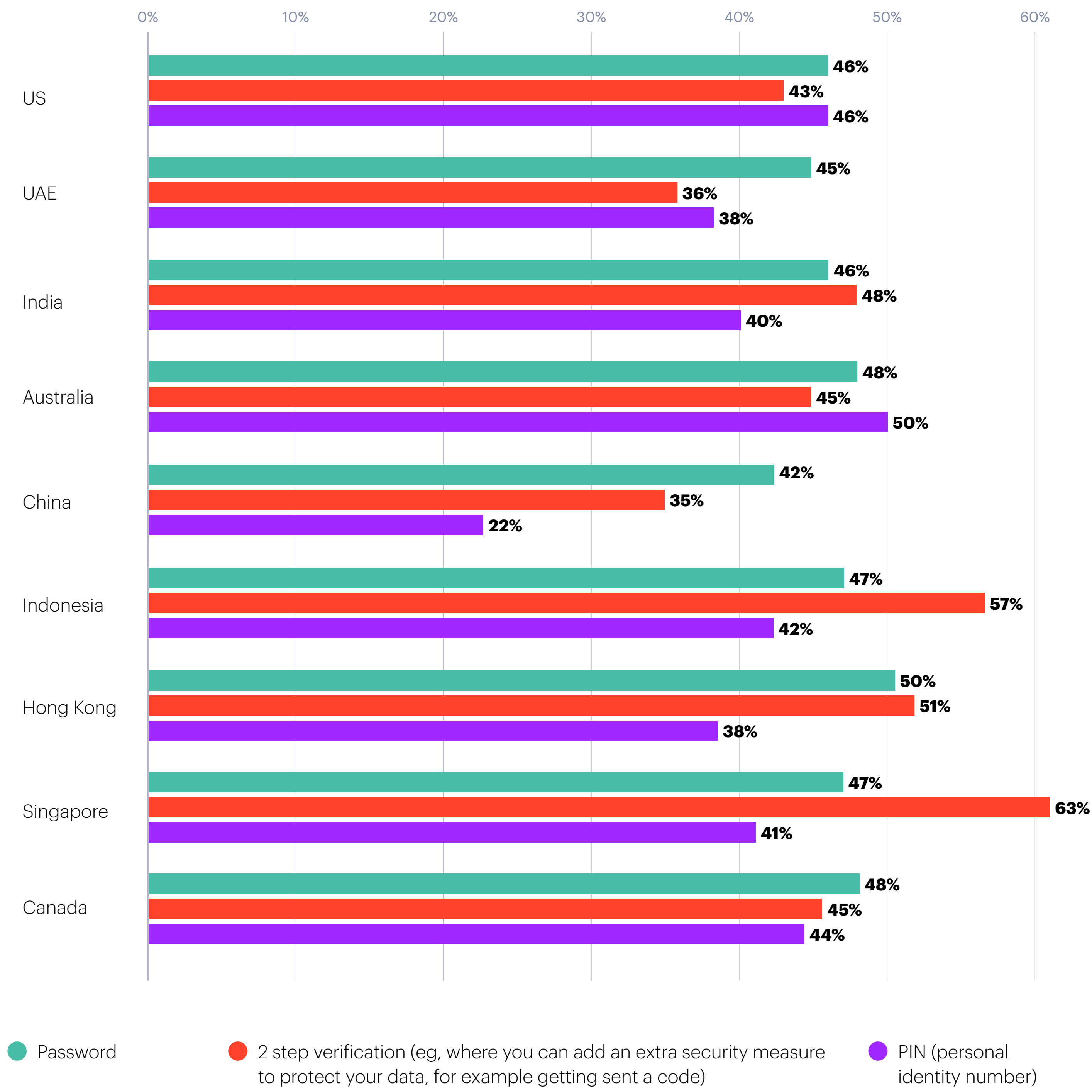
Two-step verification favoured in Asian markets

Comparing the importance of different security measures across different regions, two-step verification ranks as the highest safety measure for more than half of Singaporeans and Indonesians. In GB and India, the importance of two-step verification is also ahead of a single password protection. In France, Spain, Poland, and Australia, a personal identity number is marginally ahead of passwords.

Cell phone security measures by country



Cell phone security measures by country



Q: Thinking about your cell phone specifically, which of the following security measures do you consider to be most important to protect your privacy and secure your data when selecting a device?

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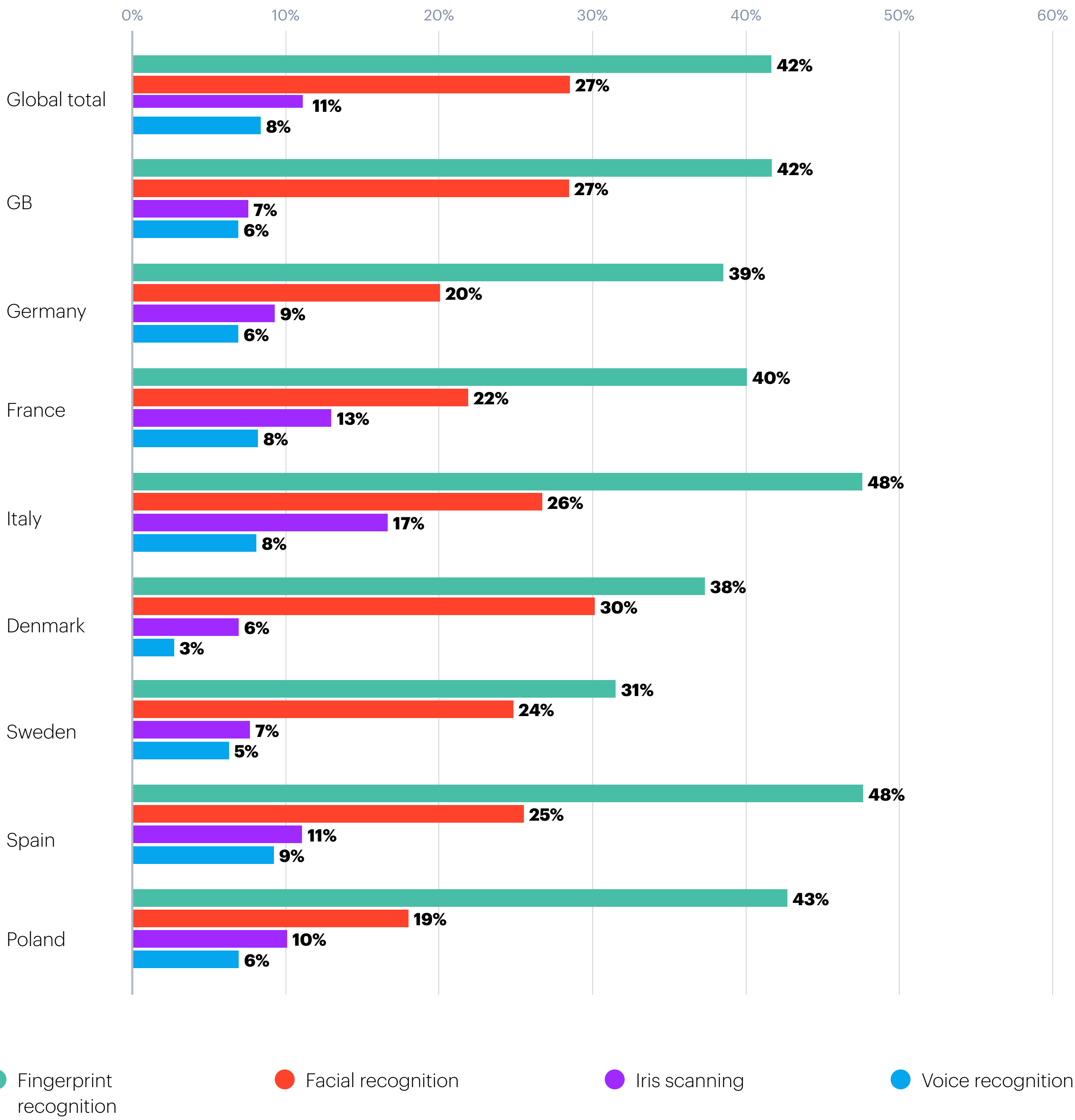
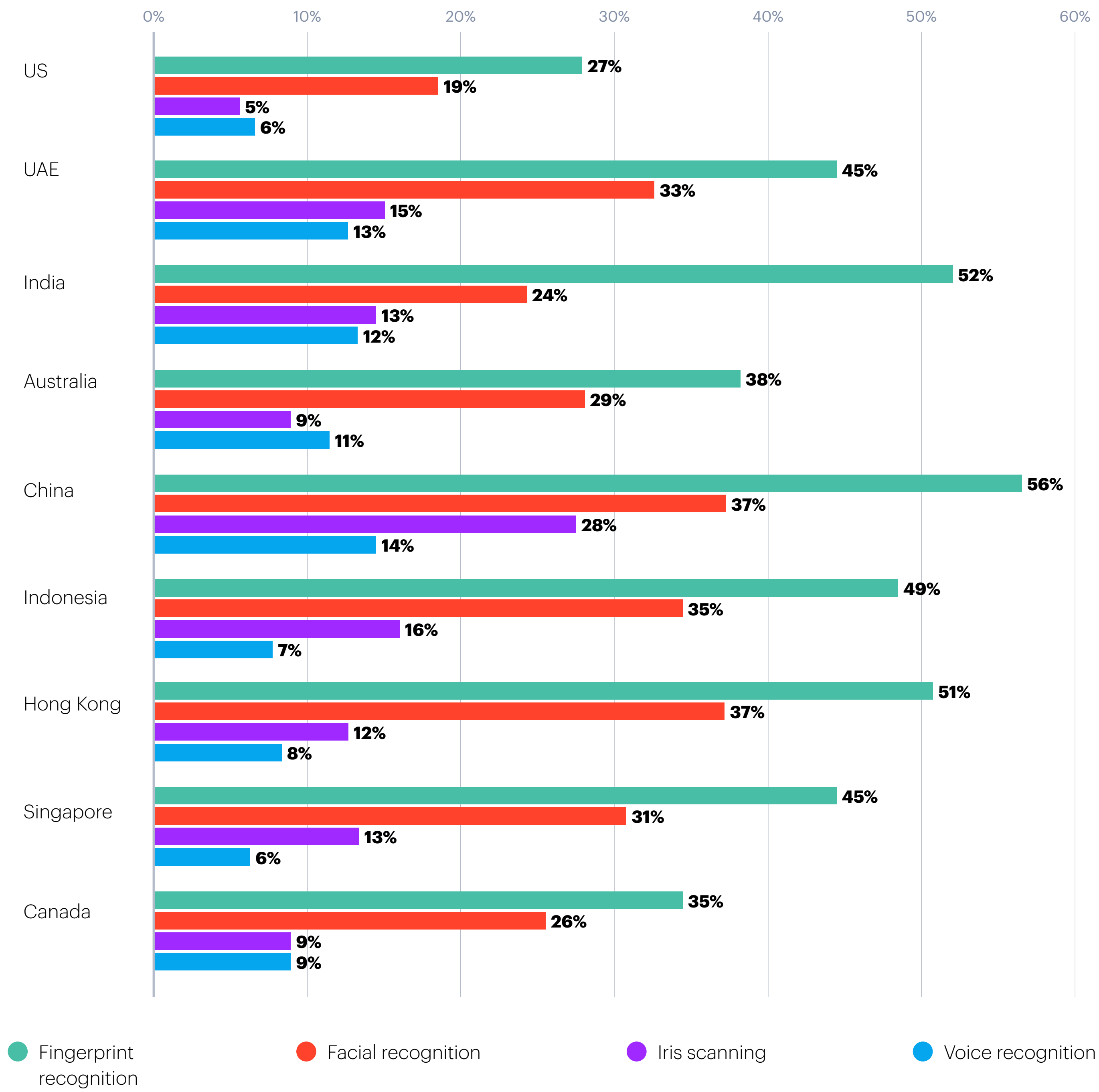
One in three Asians prefer facial recognition

The importance of fingerprint recognition is higher in Asian markets, peaking in China, India, and Hong Kong for more than one in two consumers. In addition, facial recognition also scores highly in Asia, with more consumers in Hong Kong, China, Indonesia, and Singapore considering it an important security measure than those in any other country. While some differences in security measures are reflected across the regions, protecting mobile devices and unwanted access to private data is of huge importance globally.

Cell phone security measures by country



Cell phone security measures by country



Q: Thinking about your cell phone specifically, which of the following security measures do you consider to be most important to protect your privacy and secure your data when selecting a device?

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Summary

This paper set out to understand and track changes in consumers' motivations when considering the purchase of a new electronics device.

Particularly interesting is the comparison between the motivations that led to the latest purchases of electronics goods, and the ones that will drive them in the future. Although price, ease of use, and features, remain at the top tier for both previous and future purchase drivers, data privacy and security moves from eighth (out of 10 priorities) for previous purchases, to fourth for future potential purchases. In addition, sustainability moves from bottom for previous purchases, to fifth for future purchase priorities.

This clearly indicates to electronics brands and manufacturers that, while their focus should stay on product R&D, non-tangible values for these products are becoming increasingly important. Our data shows that electronics products are increasingly loaded with expectations when it comes to sustainability and data safety.

A strong push-pull effect exists in the mind of the consumers between the allure of the newest and most advanced devices, and their concerns for sustainability, opening the door for brands to start working on their environmentally focused programmes to make good on their promises and values.

Marketing to these consumers will entail a 360 approach that can align the constant development of new features and technologies with clear and transparent action aimed at reducing the manufacturers' footprint on the environment.

While price is the key purchase driver, the challenge for manufacturers and retailers is to reduce the price of sustainable products.

All marketing levers will have to be used in consumer electronics sector going forward. With price being the number one motivation, and sustainability increasing in importance, great opportunities lie ahead when it comes to promoting recycling and encouraging trade-in programmes to entice upgrades for existing and potential purchasers. However, a key priority for electronics high-street retailers, and specialist resale-and-recycle sites, is to address one of the main concerns around purchasing a refurbished product: guarantees of quality and reliability.

Consumers around the world are becoming more aware and active around social issues like climate change and data privacy, and this is increasingly impacting their spending patterns and choices when purchasing new products. A challenge lies ahead for companies in the electronics goods sector, having to deal with the consumer's increasing ambivalence towards their products, but a challenge full of the potential to grow companies and brands while at the same time taking better care of the planet.

A challenge lies ahead for companies in the electronics goods sector, having to deal with the consumer's increasing ambivalence towards their products, but a challenge full of the potential to grow companies and brands while at the same time taking better care of the planet.

Methodology

The insights in this report are drawn from a recent global Custom survey uncovering safety and sustainability in consumer electronics past and future purchasing behavior and explores consumer attitudes to green technology, data privacy and the preferred security measures for device protection. Covering 18 global markets of more than 19,000 respondents. Our survey results were further bolstered by connecting respondent level data to YouGov's proprietary syndicated data solutions, Global Profiles, allowing us to merge our respondents and their answers to the 100,000s consumer attributes that we collect on an ongoing basis for audience segmentation and profiling. Our survey was fielded the week of 7th to 29th September 2022. The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted using a mild weighting team using interlocking demographic characteristics—methodology considered advanced in the market research space. For this report series the following population representation was used:

Region	Market	Population sampled representation	Sample Size (n=)
North America	US	National representative - 18 years of age +	**1,677**
North America	Canada	National representative - 18+	**1,007**
North America	Mexico	National (Urban focus) - 18+	**1,058**
Europe	GB	National representative - 18+	**2,015**
Europe	France	National representative - 18+	**1,003**
Europe	Germany	National representative - 18+	**1,053**
Europe	Spain	National representative - 18+	**1,002**
Europe	Denmark	National representative - 18+	**1,006**
Europe	Italy	National representative - 18+	**1,020**
Europe	Poland	National representative - 18+	**1,013**
Europe	Sweden	National representative - 18+	**1,032**
APAC	Australia	National representative - 16+	**1,034**
APAC	China	National Online - 16+	**1,033**
APAC	Hong Kong	National Online - 18+	**513**
APAC	Indonesia	National Online - 18+	**1,051**
APAC	India	National Online (Urban only) - 18+	**1,008**
APAC	Singapore	National representative - 18+	**1,053**
MEA	UAE	National representative - 18+	**1,052**

Discover living data

Run a survey

Thank you

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