

Technology & Telecoms: An Industry Snapshot

The only thing that remains consistent with technology is that it is always evolving. Just when consumers get accustomed to a certain way of doing something, a new iteration is released. But how do American consumers feel about the unending change, and are they concerned about the impact of constant connectivity?

Here, we provide a data-driven snapshot into the world of technology and telecoms to help brands and companies prepare for future consumer expectations. We measure consumer sentiment towards key trends including smart devices, 5G technology, and explore Waze's creative path to brand equity growth.

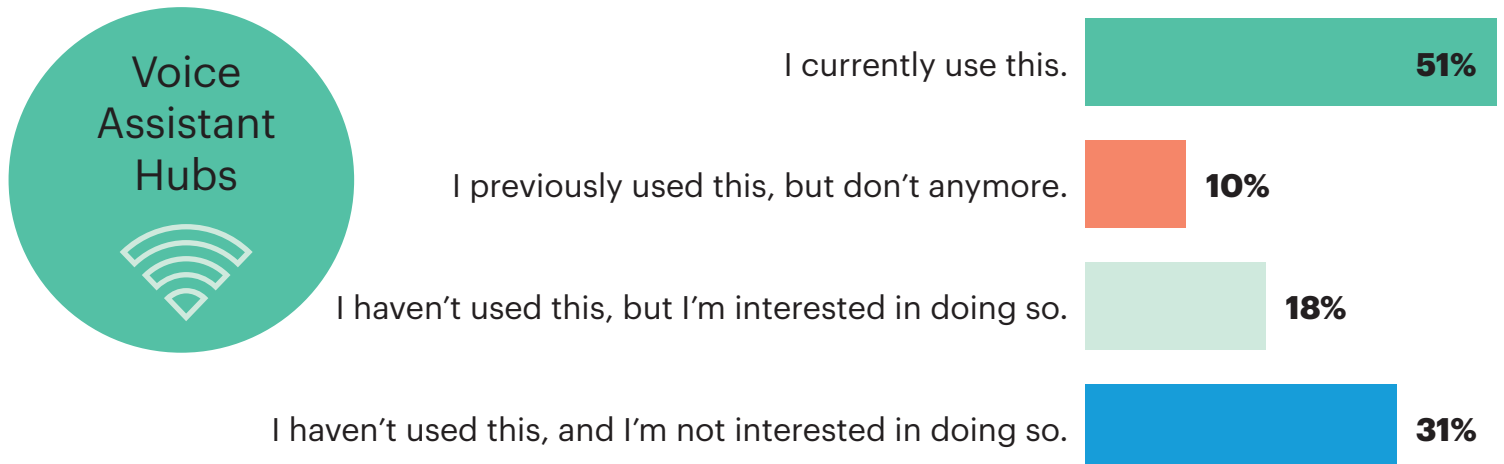
In an Era of Increased Connectivity, Some Consumers Look to "Dumb Devices"

As smart devices increasingly entrench themselves in our daily lives, consumer willingness to embrace this technology varies.

Regardless of what you're shopping for (ovens, watches, printers, vacuum cleaners, lightbulbs), there is always at least one option boasting Wi-Fi capabilities. Designed to increase user capabilities and streamline processes, smart devices are taking over store shelves.

Consumers are torn on the necessity of smart devices in everyday life. **An almost equal number of U.S. respondents describe smart devices as essential (51%) as those who do not (49%).**

Interest in utilizing smart devices varies depending on the type of device. **Voice assistant hubs (e.g., Amazon Alexa, Siri) have been the most widely adopted to-date.** Forty-one percent of U.S. respondents report currently using one, and 18% are interested in trying a voice-assistant hub. Home security systems (e.g., doorbell camera, geofencing door lock) are also popular, with 31% of consumers reportedly using this technology at home.

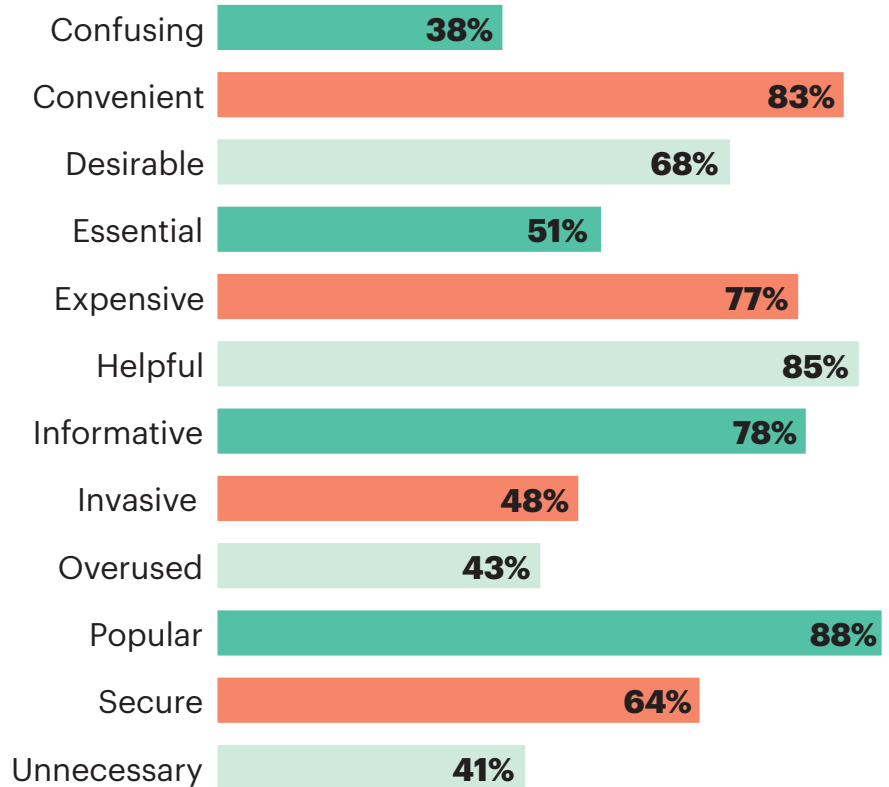
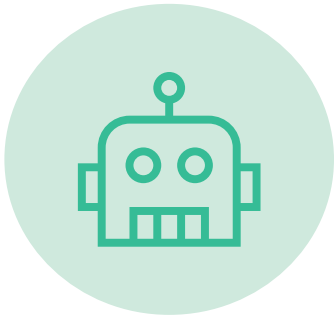


Base: U.S. Respondents. Total (n=1094) QS2Q1: How would you describe your usage of each of the following types of smart devices? Voice-assistant hubs (e.g., Amazon Alexa, Siri).

For products that consumers have not already tried, U.S. respondents most often report **interest in trying smart home appliances** (e.g., app-controlled washing machine, refrigerator with built-in display) (**34%**) and **home security equipment** (**33%**). Consumers most often reported not being interested in trying in-car internet services (i.e., through Ford SYNC, Chevy MyLink) (42%), smart appliances (41%), and smart lighting (e.g., Philips Hue bulbs, TP-Link Kasa switches) (41%).

U.S. adults associate many positive attributes with smart device technology, including **helpful (85%), convenient (83%), informative (78%), and desirable (68%)**. However, this technology is not fully embraced, as a significant number of consumers also describe the devices as **invasive (48%) and overused (43%)**.

Percentage of consumers who **associate the following** words with **smart device technology**.



Base: U.S. Respondents. Total (n=1,094 QS2Q2: Do you associate any of the following words with smart device technology?

The trend of making devices “smart” is so prevalent that some consumers struggle to locate non-connected, “**dumb devices**.” These consumers say that they are uninterested in using smart devices due to their **increased expense, invasive data collection practices, and the heightened likelihood of product glitches**. Others worry that society is becoming too dependent upon technology and actively work to limit the number of connected devices they use on a regular basis.

Consumers looking for “dumb devices” often feel overlooked in a marketplace that seems to support the notion that more technology makes for a better device.

Companies could benefit from **creating products that serve consumers with both sets of priorities**. Lines of simplified products can be sold alongside their more technologically advanced cousins, allowing individuals to decide whether they are ready to embrace a more connected future.

Lingering Confusion and Mistrust Surround 5G Technology

4G, 5G, even 6G technology?! While some consumers excitedly anticipate the technological advances, many others are left scratching their heads in confusion.

Cellular providers began releasing 5G compatible devices in 2019, but service is still not available across all regions of the United States. Despite years of planning, 5G's rollout did not always proceed smoothly. [Airlines loudly warned](#) that 5G signals would dangerously interfere with plane equipment, and some consumers feared that 5G waves would harm their health.

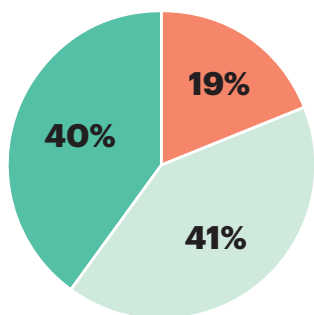
Significant numbers of consumers express uncertainty when asked whether they agree with the following statements on 5G's impact: **the radio waves used in 5G technology are harmful to people's health (41%), 5G technology is bad for the environment (40%), and the benefits of adopting 5G technology outweigh the risks (35%).** In comparison, the following percentages of respondents answered "yes" to the preceding statements (24%, 19%, 49% respectively).

Despite consumer hesitancy, there is excitement surrounding how 5G can make society more productive and secure. **More than half of U.S. adults think 5G access will help people (62%) or businesses (65%) be more productive.** Sixty-seven percent of consumers think that 5G will make communication easier, and half believe 5G networks are more secure than previous generations of cellular networks.

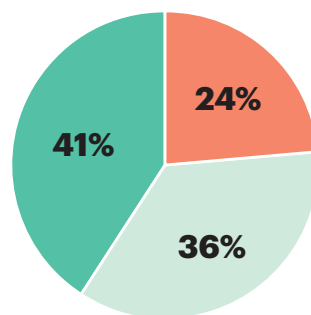
Months into life with 5G, consumers are still wary. While there is hope that faster connectivity could boost productivity, many are still unclear about whether this advancement is a net negative or positive for society.

Cellular providers must focus on consumer education. Instead of promoting ads that tout expansive 5G coverage, companies should acknowledge consumer hesitancy and inform the public about potential risks and benefits. Proper product education can alleviate misplaced consumer fears and get consumers onboard with this new wave of technology.

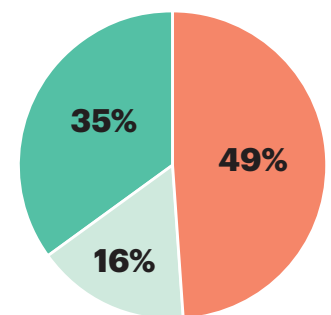
"5G technology **is bad** for the **environment.**"



"**Radio waves** used in 5G technology are **harmful** to people's health."



"The **benefits** of adopting 5G technology **outweigh the risks.**"



Yes No Not at all sure

Base: U.S. respondents Total (n=1,094)
QS2Q3: Based on what you know about 5G technology, are the following statements true for you?

Waze Increases Brand Equity by Delighting App Users

Google's popular navigation app Waze has always had a more playful personality than their other app, Google Maps. Whereas Maps uses a straightforward, data-driven approach, Waze depends on its 140 million users to help other drivers find smoother routes by reporting accidents, street hazards, and construction zones in real-time.

Using data from [Harris Brand Platform](#), we see Waze's brand equity jump from August to September 2021, as the brand creatively provided users with a more delightful driving experience.

In select cities, Waze pioneered a [Too Good To Go campaign](#) that allowed restaurants with surplus food to sell items to drivers at a discount. For approximately a third of the typical retail price, drivers could order surprise bags of food. Waze's initiative simultaneously reduced food waste and delighted their app users with affordable, and tasty, food options. Drivers could see participating restaurants through pins on the Waze app. To order, drivers would download and place their order through a separate Too Good To Go app.

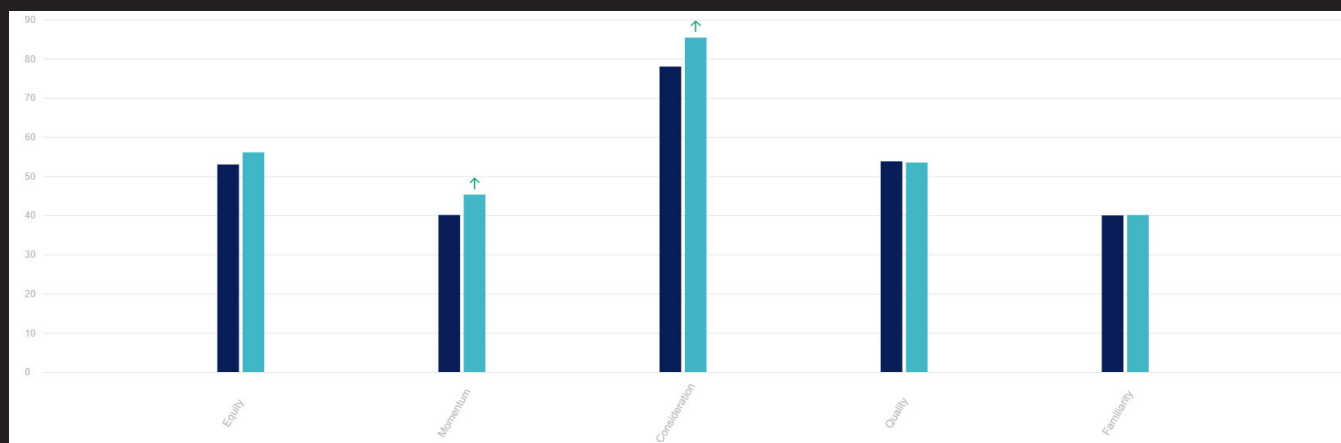
In July and August, Waze [partnered with Halo](#) and [PAW Patrol](#), allowing drivers to have some of their favorite characters lead them to their final destination. The app also released a [limited-edition Cat & Dog theme](#) so animal lovers could receive turn-by-turn assistance by either an upbeat dog (in the Woof Wagon), or a neurotic cat (in the Meow Mobile).

While driving can often spike frustration as drivers cut in front of your car, or traffic slows to a crawl, Waze's innovative choices take the edge off the worktime commute. Their playful solutions reduce the stress of an otherwise mundane drive, and keep drivers pleasantly engaged.

These creative partnerships help explain why **"innovative" (30.7)** is one of the emotional descriptors consumers familiar with the brand most often used to describe it. This descriptor was selected by consumers second to only **"dependable" (32.7)**.

When comparing Waze's brand data from 7/1/21-8/31/21 to 9/1/21-10/31/21, we see the **brand's consideration increase by +7.4**. This growth highlights that consumers familiar with the Waze brand were more likely to consider using the app in September and October than they were in July and August. The **brand's momentum increased by +5.2**, reflecting consumers' belief that the Waze brand is on the way up. These results demonstrate the positive consumer sentiment that brands can foster from using creativity to delight their consumers.

Waze's Change in Brand Equity













How do Technology Brands Stack Up?

Using data from Harris Brand Platform, we rank the top 10 brands with the highest brand equity scores across the technology and telecoms space. This represents the brands with the highest perceived value based on their reputation with their audience. Scores reflect data from January-March 2022.

We also highlight the five brands that saw the greatest growth in their brand equity scores in the first quarter of the year. This shows that overall consumer perception of the brands' values significantly rose over this period of time.






Top 10 Brands by Brand Equity Score

Numbers show each brand's equity score across the general population in Q1 2022.

	75.5%		55.7%
	72.5%		53.9%
	71.9%		51.6%
	56.9%		50.2%
	56.3%		49.5%

Top 5 Brands by Growth in Brand Equity

Numbers reflect the percent growth of each brand's equity score from Q4 2021 to Q1 2022.

				
3.0%	2.8%	2.4%	2.1%	2.0%

SEE HOW YOUR BRAND COMPARES - BRAND INTELLIGENCE BUILT FOR THE 21ST CENTURY

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