

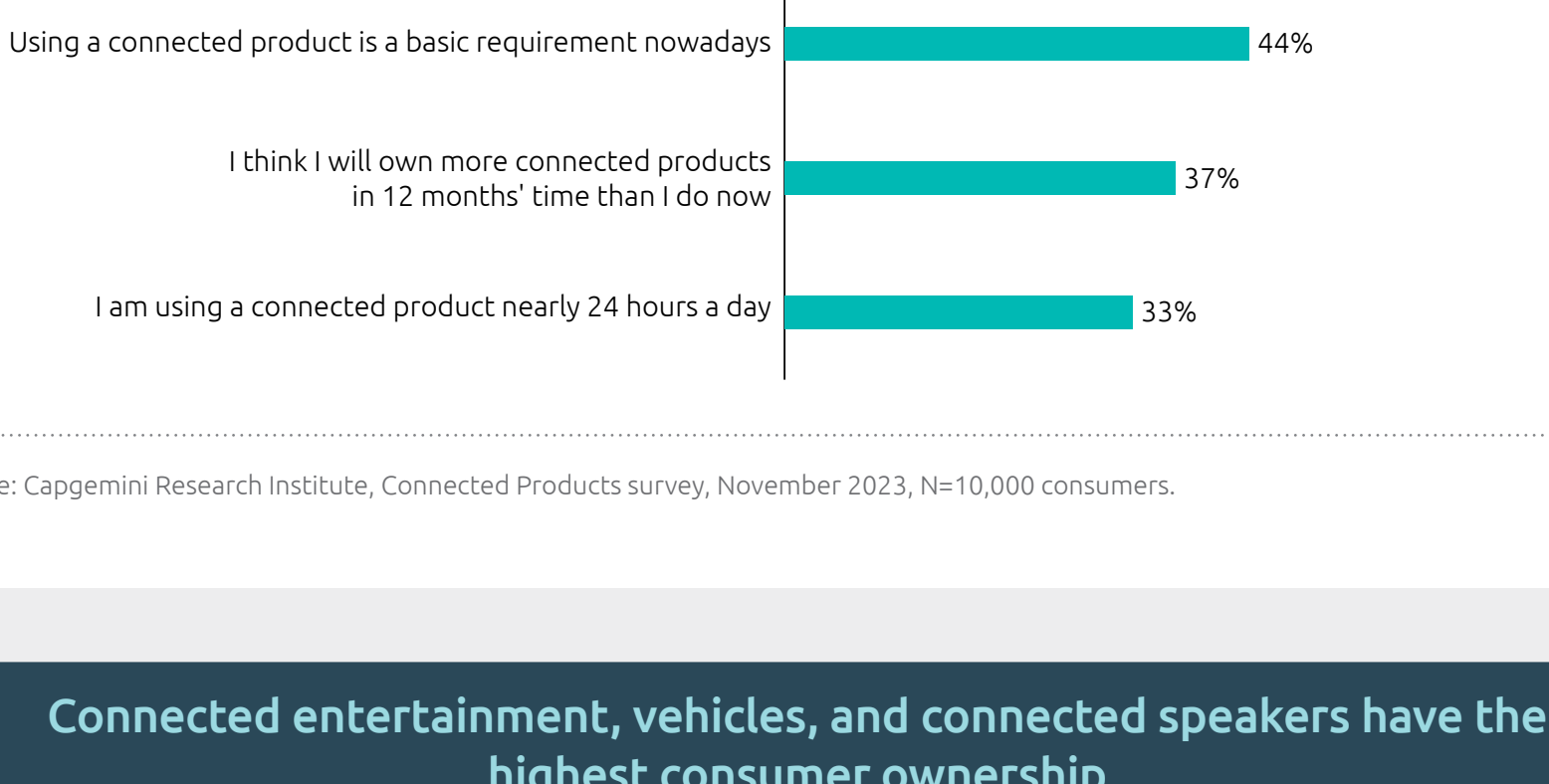
Connected products

ENHANCING CONSUMERS' LIVES WITH TECHNOLOGY

Connected products are an integral part of everyday life

One-third of consumers rely on a connected product around the clock

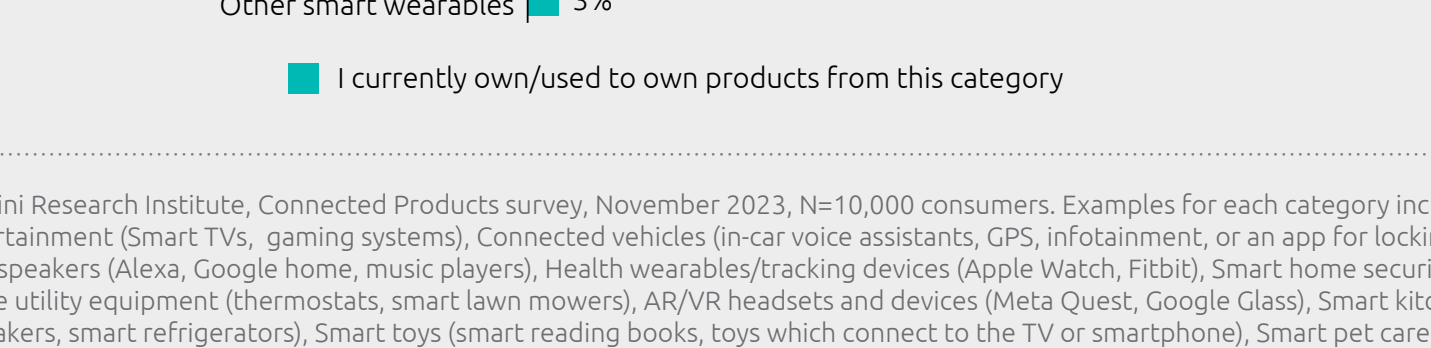
IMPACT CONNECTED PRODUCTS HAVE ON CONSUMERS' DAILY LIFE AND LIFESTYLE



Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

Connected entertainment, vehicles, and connected speakers have the highest consumer ownership

SHARE OF OWNERSHIP OF CONNECTED PRODUCTS, BY CATEGORY

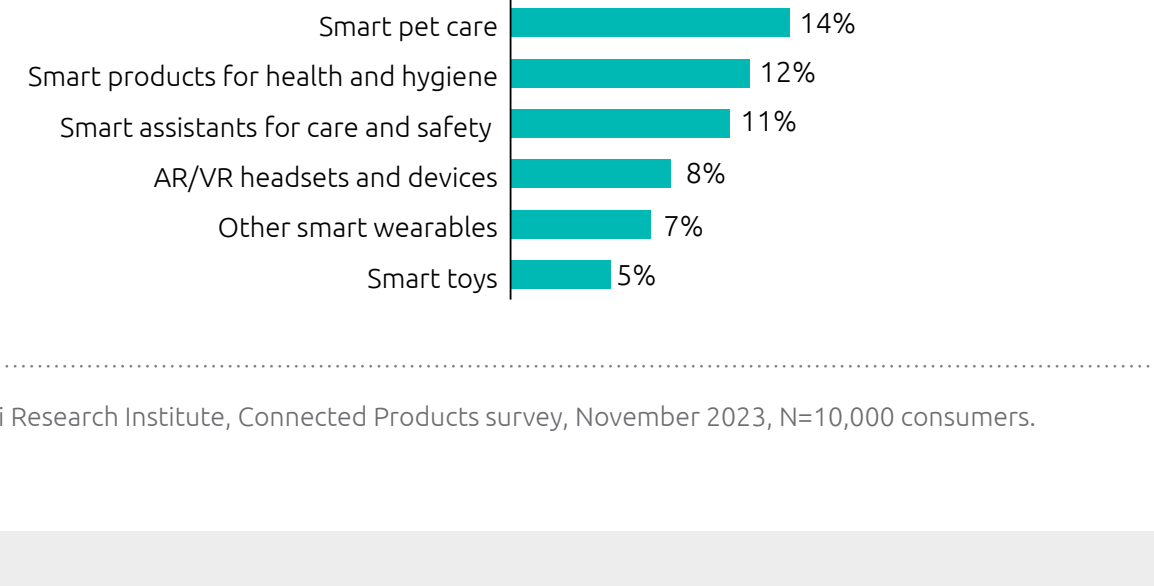


■ I currently own/used to own products from this category

Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers. Examples for each category include: Connected entertainment (Smart TVs, gaming systems), Connected vehicles (in-car voice assistants, GPS, infotainment, or an app for locking your car), Connected speakers (Alexa, Google home, music players), Health wearables/tracking devices (Apple Watch, Fitbit), Smart home security (smart doorbells), Home utility equipment (thermostats, smart lawn mowers), AR/VR headsets and devices (Meta Quest, Google Glass), Smart kitchen (smart coffee makers, smart refrigerators), Smart toys (smart reading books, toys which connect to the TV or smartphone), Smart pet care (smart pet health trackers, smart collars), Smart products for health and hygiene (smart weighing scales, smart shower controllers), Smart assistants for care and safety (smart pill dispensers, AI companions), smart wearables (smart sunglasses, smart clothing).

Smart home security and health wearables top the list of connected products that consumers plan to purchase in the next 12 months

I AM LIKELY TO BUY PRODUCTS FROM THIS CATEGORY IN THE NEXT 12 MONTHS



Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

Voice assistants and health wearables provide positive consumer experiences

Use of voice assistants has steadily increased since 2017

HAVE YOU USED A VOICE ASSISTANT?



Consumers from France, Germany, the UK, and the US only

Source: Capgemini Research Institute, Connected Products survey, November 2023, N=4,500 consumers from the US, the UK, France, and Germany; Conversational Interfaces Research, consumer survey, April-May 2019, N=5,037 consumers from the US, the UK, France, and Germany only; Conversational commerce: Why consumers are embracing voice assistants in their lives, 2018.

One in three consumers uses wearables to monitor their health

% OF CONSUMERS THAT REGULARLY PARTICIPATE IN THE FOLLOWING ACTIVITIES USING HEALTH WEARABLE/TRACKING DEVICES

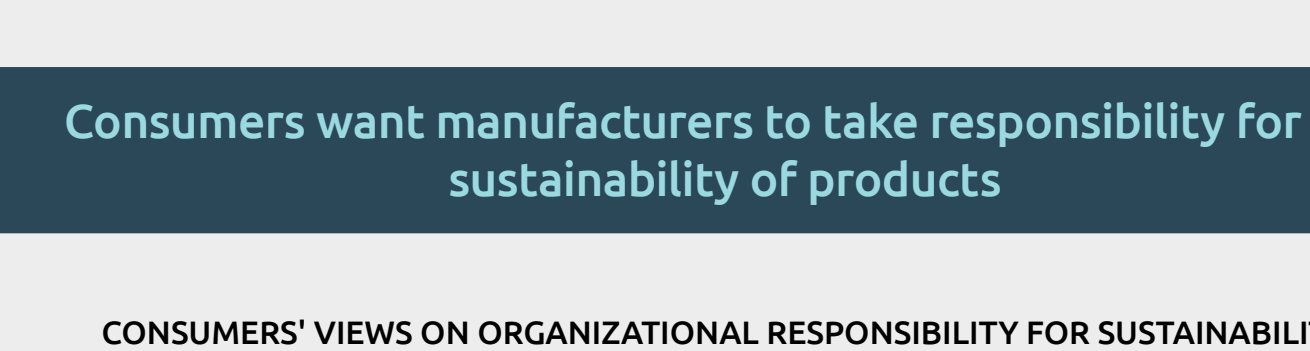


Source: Capgemini Research Institute, Connected Products survey, November 2023, N=3,329 consumers using health wearables.

While conscious of the sustainability burden, consumers want organizations to step up

Consumers are aware of the costs of e-waste and want to know the carbon footprint of products

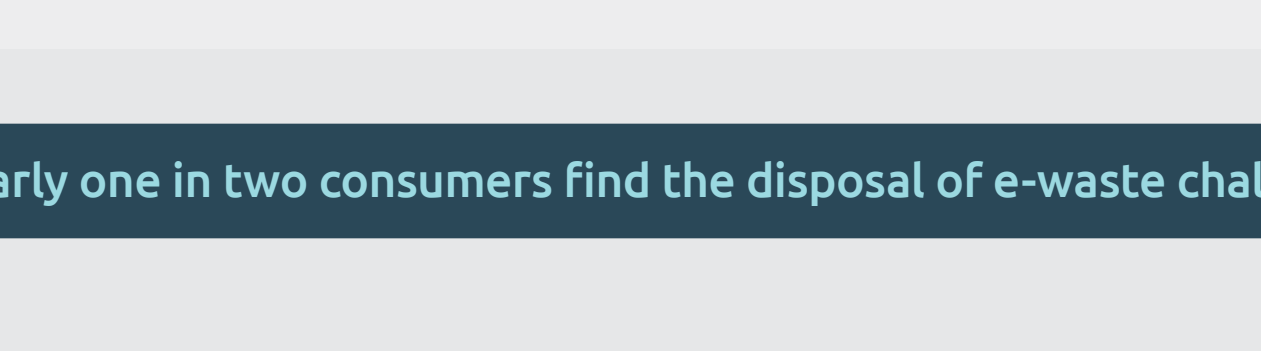
AWARENESS AND DATA AVAILABILITY AROUND CARBON FOOTPRINTS



Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

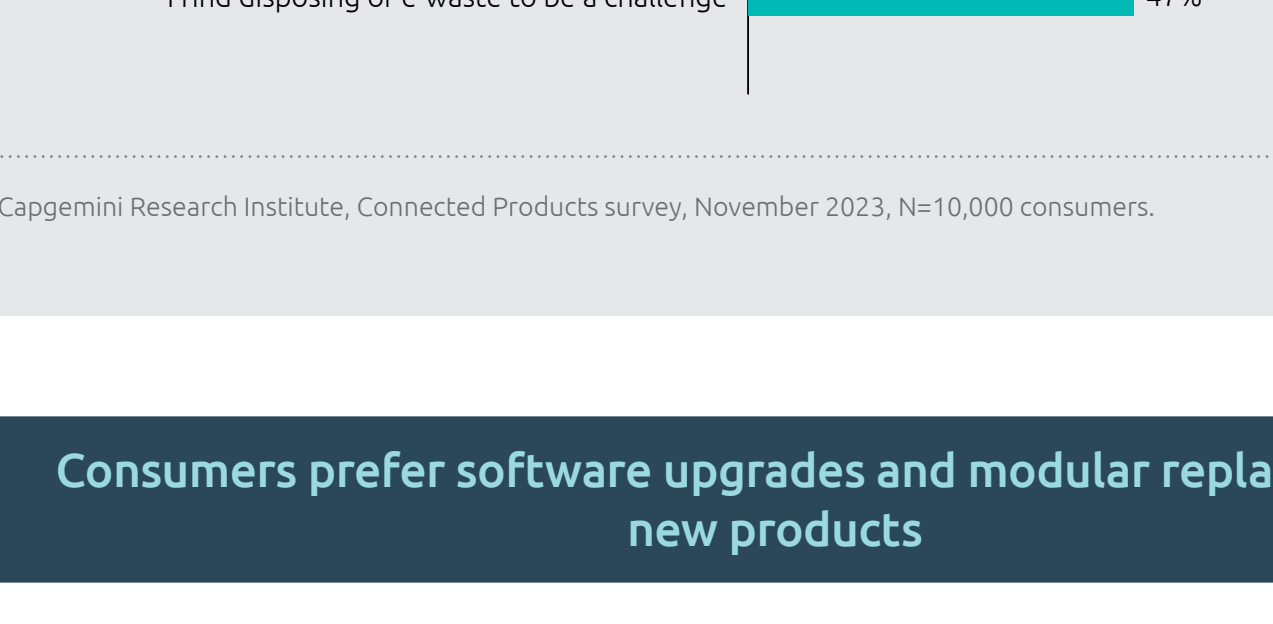
Consumers want manufacturers to take responsibility for the sustainability of products

CONSUMERS' VIEWS ON ORGANIZATIONAL RESPONSIBILITY FOR SUSTAINABILITY



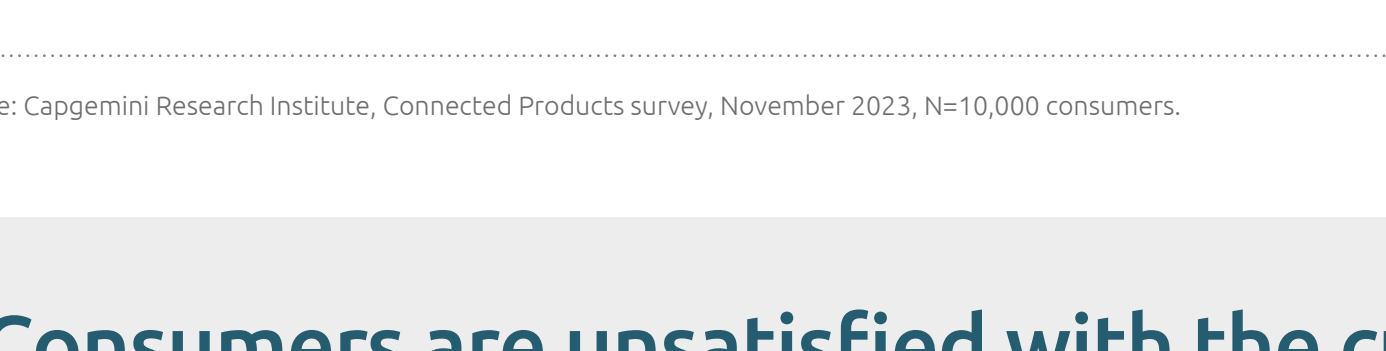
Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

Nearly one in two consumers find the disposal of e-waste challenging



Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

Consumers prefer software upgrades and modular replacement to new products

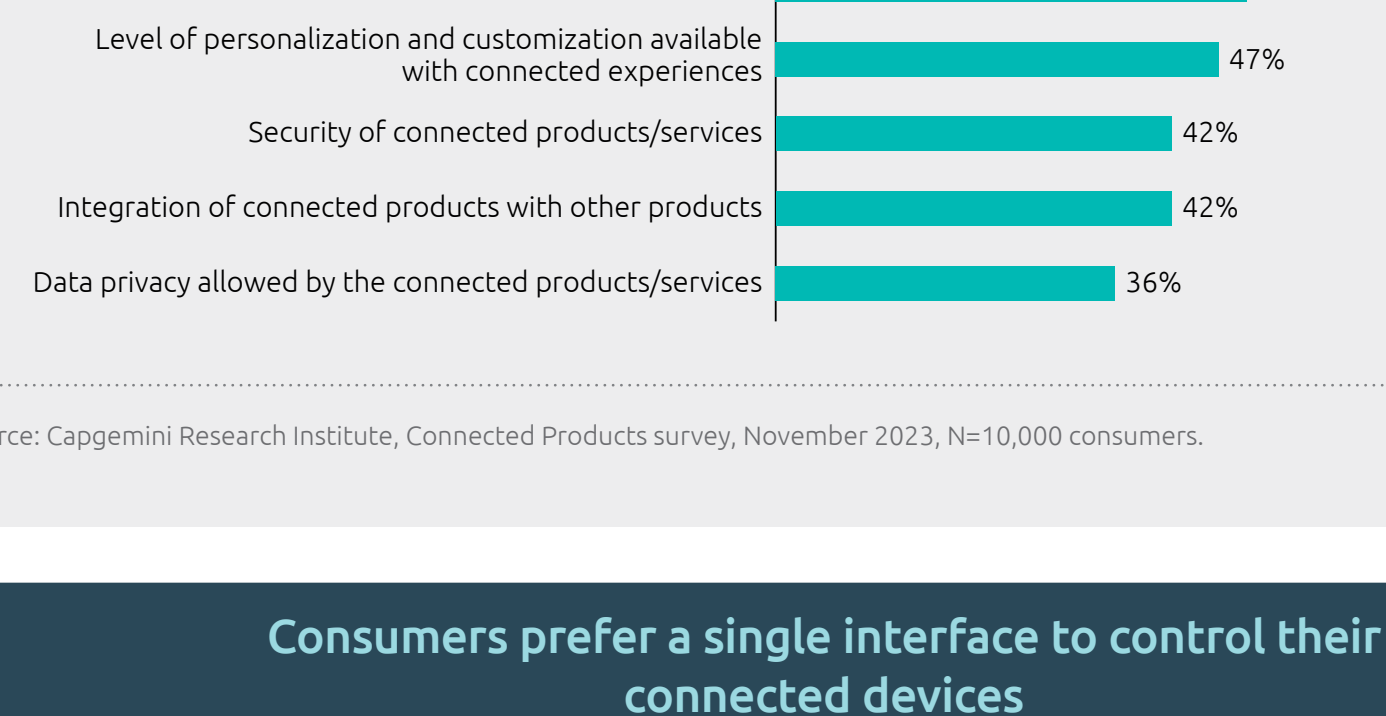


Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

Consumers are unsatisfied with the current state of data privacy and integration of connected products

Consumers are unsatisfied with data privacy, security, and integration of connected products

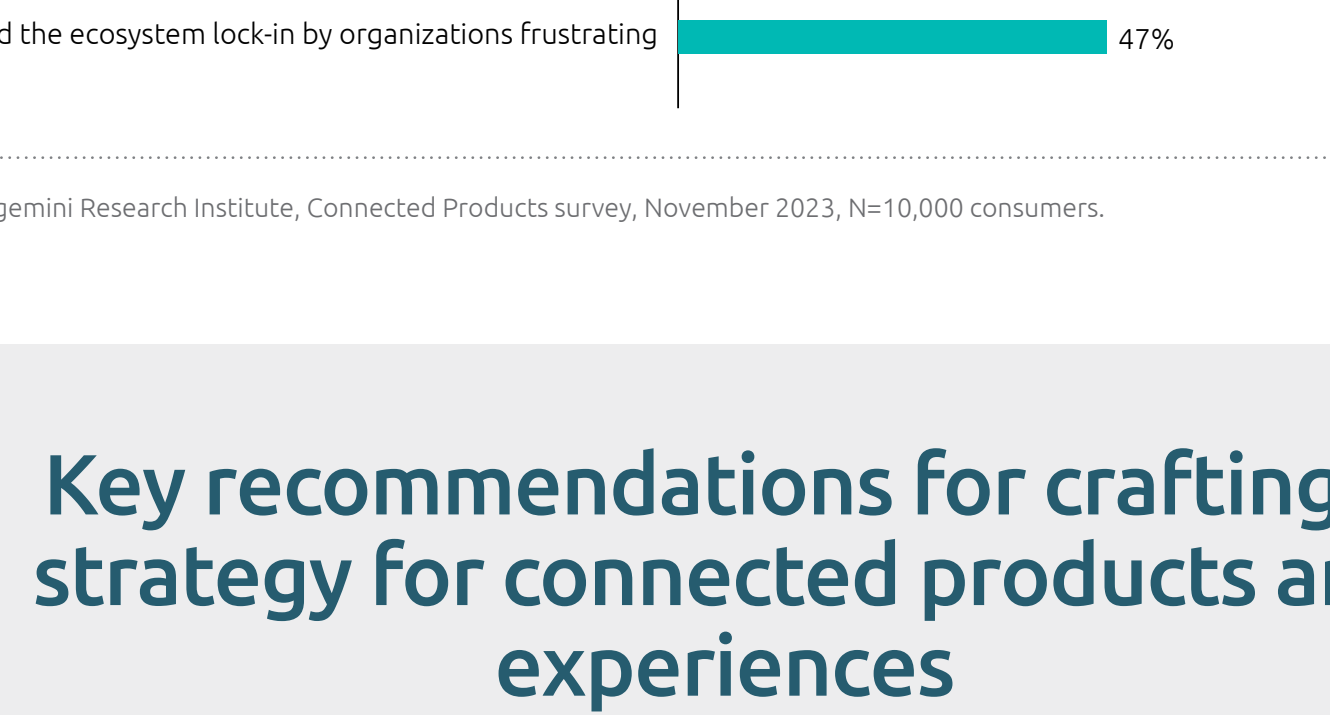
SHARE OF CONSUMERS WHO ARE SATISFIED WITH THE BELOW FEATURES OF CONNECTED PRODUCTS



Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

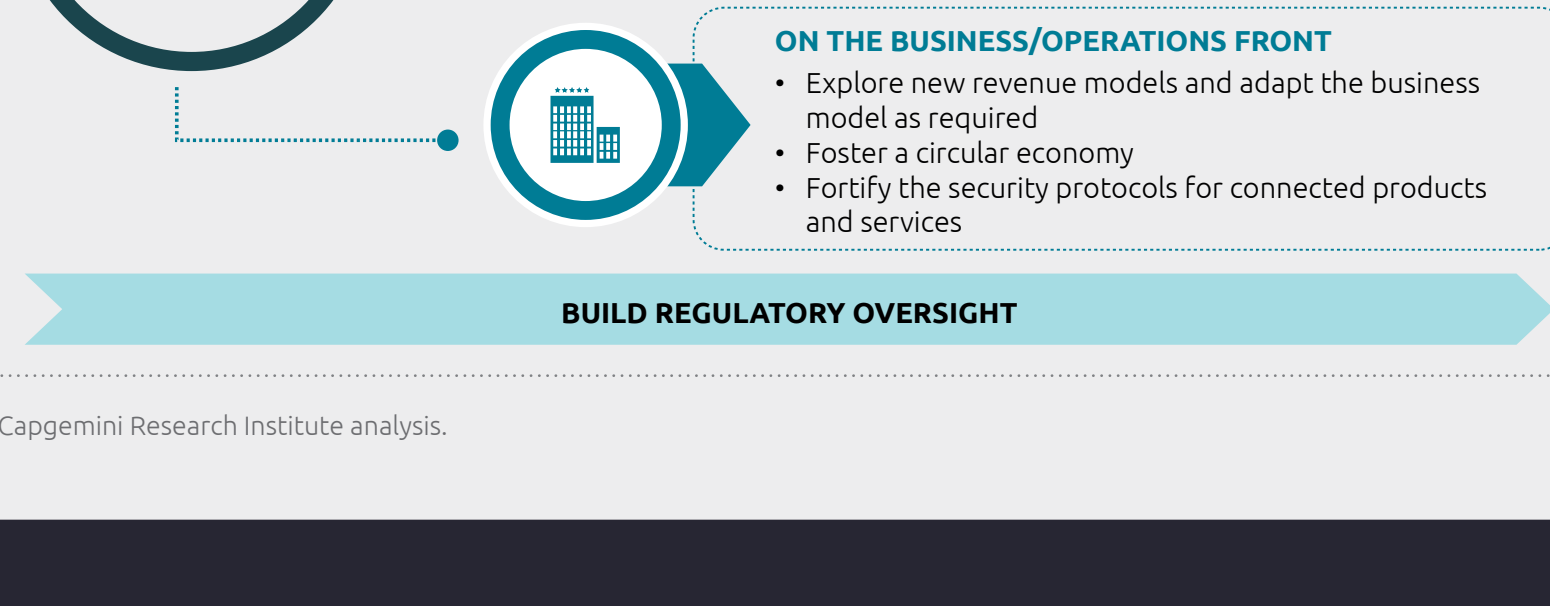
Consumers prefer a single interface to control their connected devices

CONCERNS REGARDING USAGE OF CONNECTED PRODUCTS/SERVICES



Source: Capgemini Research Institute, Connected Products survey, November 2023, N=10,000 consumers.

Key recommendations for crafting a strategy for connected products and experiences



Source: Capgemini Research Institute analysis.

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