

# ATTITUDES TOWARDS EMERGING TECH – GERMANY – 2023

Generative AI offers a wealth of opportunities for brands, especially in engaging younger adults. Addressing concerns such as AI's impact on human interactions is key to enabling a smooth transition.



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# Attitudes Towards Emerging Tech - Germany - 2023

## This report looks at the following areas:

- The impact of the cost-of-living crisis on emerging technologies
- The approach German consumers take to adopting emerging technologies
- Use and interest in emerging technologies, including Virtual Reality, Generative AI and cryptocurrency
- The perceived impact of AI on different areas, including shopping, healthcare and the job market
- Technologies German consumers are most excited to see development for in the future, including smart home technology and driverless cars
- Attitudes towards emerging technologies, including the appeal of AI-generated art, humans' capacity to emotionally connect to robots, and the perceived future of cryptocurrencies



Generative AI offers a wealth of opportunities for brands, especially in engaging younger adults. Addressing concerns such as AI's impact on human interactions is key to enabling a smooth transition.

## Overview

**44% of German 16-34s** think art generated by AI can be just as appealing as art generated by humans (vs 27% for all). This highlights significant **opportunities for brands to use AI for content generation when targeting younger adults, such as with content for streaming services or advertising.**

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Early Adopters of emerging technologies are typically higher-income earners, who are less affected by rising costs of living. As such, the market for emerging technologies is expected to remain relatively resilient to economic turbulence. However, **since not all Early Adopters are high earners, brands can promote growth by striving for income inclusivity**, for example by offering rental options for devices such as VR headsets.

German consumers in particular look forward to **AI helping them find information**, presenting opportunities for brands to implement AI tools and features (eg Amazon's AI customer review summaries). **Younger Germans are particularly positive about how AI might improve shopping**, enabling brands to enhance their ecommerce experience, ranging from hyper-personalisation of information to chatbot assistance.

However, Germans tend to perceive the impact of AI on the job market and human interactions negatively. To **capitalise on the power of AI, brands adopt a positive narrative around AI**, by highlighting how it can free up time for more interpersonal tasks in the workplace.

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# Report Content



## EXECUTIVE SUMMARY

- The five-year outlook for emerging technologies

### Market context

- Ease adoption by anticipating Germans' perception of tech
  - Graph 1: perceived impact of technology on selected areas of life, 2023
- Affluence of Early Adopters to protect emerging tech from economic turbulence
  - Graph 2: usage of emerging technologies, by net monthly household income, 2023

### Opportunities

- Harness the full power of AI by alleviating consumer concerns
  - Graph 3: anticipated impact of AI on areas of life, 2023
- Leverage AI to enhance the customer journey
- Use chatbots to assist younger consumers' shopping experience
- Capitalise on younger Germans' openness towards AI-generated content
- Employers: highlight how AI can promote human interactions

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 4: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure
- Affluence of Early Adopters to protect emerging tech from economic turbulence
  - Graph 5: usage of emerging technologies, by net monthly household income, 2023
  - Graph 6: planned change in spending on technology and communication in next six months, by approach to emerging technologies, 2023
- Capitalise on the purchasing power of Early Adopters

### Perceptions of technology

- Ease adoption by anticipating Germans' perceptions of tech
  - Graph 7: perceived impact of technology on selected areas of life, 2023
- Address younger Germans' concerns regarding tech and wellbeing
  - Graph 8: change in overall mental wellbeing compared to a year ago, 2022

## WHAT CONSUMERS WANT AND WHY

### Approach to adopting emerging technologies

- Germans are open but hesitant with emerging technologies
- Focus on Early Adopters to reassure the mainstream
- Age and gender predict affinity towards emerging tech
  - Graph 9: respondents who like to try emerging technologies as soon as they are available, by age & gender, 2023
- Focus on targeting younger men with emerging tech...
- ...but consider broadening appeal
- Put a focus on affluent consumers...
  - Graph 10: respondents who like to try emerging technologies as soon as they are available, by net monthly household income, 2023
- ...but be income-inclusive as well
- Capitalise on international peer reviews

### Use and interest in emerging technologies

- Emerging technologies hold growth potential on the German market
  - Graph 11: usage and interest in emerging technologies, 2023
- Look beyond Early Adopters
  - Graph 12: emerging technologies used, by approach to adopting emerging technologies, 2023
- 16-34s lead adoption of emerging tech in Germany
  - Graph 13: usage of emerging technologies, by age, 2023
- Prove utility to successfully engage younger Germans with emerging tech
- Tap the growth potential of emerging technologies in Germany
  - Graph 14: consumers who have not used select technologies but are interested in doing so, by age, 2023
- Don't miss out on the growth potential among middle-aged and older Germans
- Capitalise on the growth potential of internet tech among mid-to-older-aged Germans
- XR devices need to prove their worth to drive growth
- Use Chatbots to assist younger consumers' shopping experience
- Examples where brands can tap younger Germans' Chatbot interest to assist shopping
- Directly engage younger Germans with generative AI tools

### Perceived impact of AI on areas of life

- Germans and AI: interested, but concerned
  - Graph 15: anticipated impact of AI on areas of life, 2023
- Mind consumer concerns with AI to facilitate smooth integration
- Anticipate how AI will transform the customer journey
- Social media platforms: capitalise on generative AI to fortify ecommerce stance

## Attitudes towards Emerging Tech – Germany – 2023

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- Don't lose the human factor
  - Graph 16: perceived impact of AI on how we interact with each other, by age, 2023
- Use AI to enhance the service quality of healthcare
- Leverage AI to assist younger Germans in keeping well...
- ...and use a hybrid approach to get older Germans on board
- Tap AI to increase the entertainment value
- Use AI to make entertainment more interactive
- AI to hyper-personalise gaming experiences
- Shape a positive narrative around AI
  - Graph 17: perceived impact of AI on the job market, by age, 2023
- Employers can leverage AI to resonate with young men
  - Graph 18: perceived impact of AI on the job market, by age and gender, 2023
- Emphasise how AI can promote human interactions
  - Graph 19: perceived impact on varying areas, by negative perception of AI on human interactions, 2023

### Most engaging technology sectors for the future

- Resonate by innovating essential devices
  - Graph 20: technologies most excited to see developments for in the future, 2023
- Capitalise on the interest in AI among younger Germans
- Keep in mind who you are innovating for
  - Graph 21: technologies most excited to see developments for in the future, by approach to adopting emerging tech, 2023
- Target smart home innovations to tech enthusiasts

### Attitudes towards emerging technologies

- Make safety for children a core element of innovation
  - Graph 22: attitudes towards emerging technologies, 2023
- Hyper-personalise the online experience for younger Germans
- Provide personalisation opt-outs to allay concerns
- Enhance how Gen Z can socialise online
- Capitalise on younger Germans' openness towards AI-generated art
- AI content is shaping pop culture among younger Germans – tap it!
- Heinz taps generative AI shaping pop culture
- Leverage crypto to resonate with younger German men
- Embrace the future potential of robots

### LAUNCH ACTIVITY AND INNOVATION

- Apple announces its first take on the VR/AR device market

- Apple announced its first take on the VR/AR device market
- Google develops AI tools for healthcare
- Amazon to bring Generative AI to Amazon Astro in coming years

## APPENDIX

### Appendix – abbreviations, consumer research methodology and language usage

- Abbreviations
- Consumer research methodology
- A note on language

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