



The Invisible Computing Company

The Long-Term Impact of COVID's Short-Term Technology Adoption

How the Pandemic is Expanding and
Reshaping Today's First Adopters

Introduction

When most Americans began sheltering in place in March as the pandemic disrupted their daily lives, many turned to various technologies to adapt to a 'new normal.' Some were already avid users of new technologies. Others increased the frequency of their technology use. And some people were purchasing and using certain devices, applications and services for the first time out of necessity, not choice.

Consumer technology adoption is often driven by significant technology advances, superior design and functionality, or major cultural and behavioral shifts in the market. But, what happens when people are practically forced into adopting a technology? They say that necessity is the mother of invention, but if that necessity is temporal and passes, does the invention and ensuing behavior remain or do we revert to form?

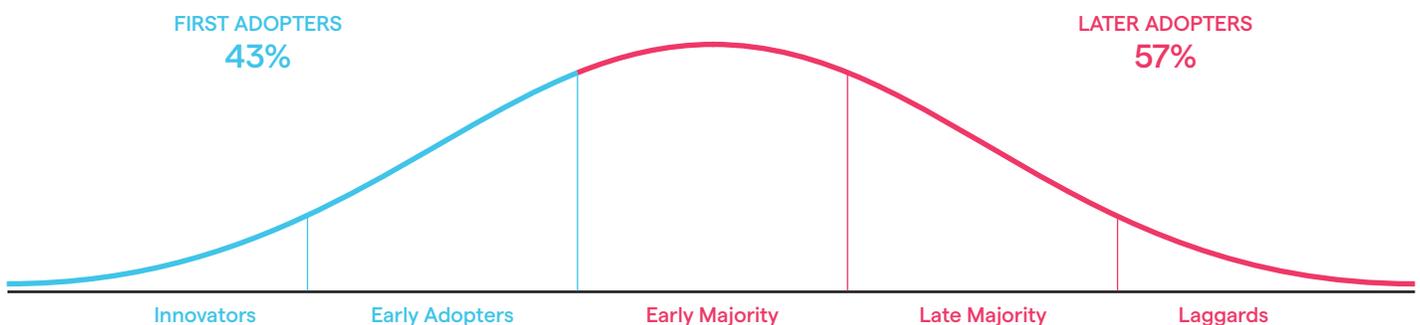
Many consumers who had never thought of relying on online grocery delivery or web-conferencing services now wonder why they weren't using them before. Technology adoption is accelerating and the types of tech users are changing as a result of specific challenges caused by COVID-19. But an important question is — will this surge in technology adoption have staying power? Will the changes stick?

To dig deeper and explore how technology adoption driven by COVID-19 and shelter in place will effect demonstrable, longer-term behavioral shifts, Mojo Vision surveyed 2,000 consumers in June 2020.

Definitions

First, some definitions around technology users. The survey asked respondents to self-identify in five cohorts, which are described and plotted below:

FIRST ADOPTERS 43%	LATER ADOPTERS 57%
INNOVATORS (14%): I am usually one of the first customers to try a new technology product, regardless of the cost or if the kinks of the product haven't completely been worked out.	EARLY MAJORITY (37%): I wait for the technology product to become more popular and maybe even for a second or third version to come out before I buy and use it.
EARLY ADOPTERS (29%): I am usually among the first of my friends or family to buy a new product, but I do research before buying and using a new technology product.	LATE MAJORITY (15%): I often buy and use a technology a couple of years after it has become popular.
	LAGGARDS (5%): I am not that comfortable with technology and will wait a long time before I try a product and become comfortable with using it.



Baseline Results

The adoption of tech by all users during COVID is to be expected. When a country is forced to stay at home, people are going to find ways to work, eat and entertain themselves using whatever means are at their disposal. But, the longer term effect is not so intuitive. The data in this report suggests that the changes may be more permanent than anticipated and could have lasting impact in terms of consumer behavior, audience expansion and market growth.



76%
of First Adopters

41%
of Later Adopters

say they are likely to continue purchasing and using new technology at this new pace after the pandemic subsides.

Key Findings From the Survey

Sheltering in place and social distancing sparked new technology adoption.

The pandemic caused **60%** of First Adopters to buy and/or try new devices, applications and services that they hadn't used before. The same was true with **40%** of Later Adopters who affirmed they too were buying or trying new tech because of the pandemic.

Consumers demonstrated increased usage or dependence on technology.

50% of both First Adopters and Later Adopters said they are either using technology more or have become dependent on technology since the onset of COVID-19.

Increased technology usage is favorably changing attitudes toward technology.

60% of First Adopters and **38%** of Later Adopters said they're either more likely or somewhat more likely to buy and use new technologies than they were before.

The short-term shifts in adoption and usage will impact long-term adoption trends.

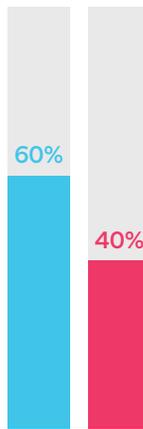
76% of First Adopters and **41%** of Later Adopters said they are likely to continue buying and trying new devices, apps or technology-driven services once the COVID-19 crisis subsides.

COVID-19 and Sheltering in Place Prompt Spike in Technology Adoption

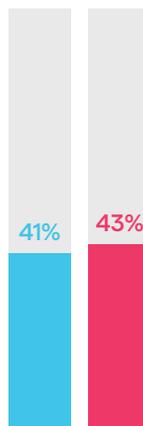
The pandemic marked a significant shift in behavior for consumers across all responding cohorts. When unable to perform daily functions as normal, many consumers turned to devices, applications and services for solutions. Maintaining communication with family and friends and improving quality of life were the two most important factors in shifting attitudes and behavior surrounding technology adoption.

But the most arresting effect is that technology use and dependence grew or stayed steady across virtually all the cohorts, with nearly 90% of respondents saying their use and reliance on tech either increased or remained the same during shelter in place.

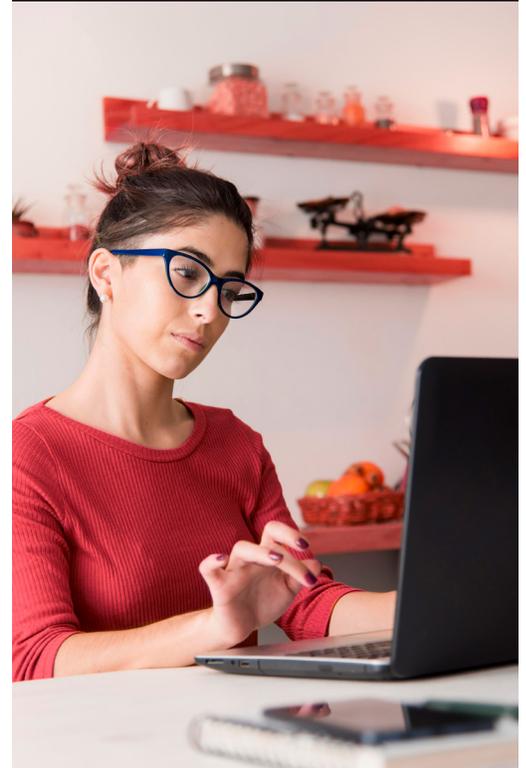
The onset of COVID-19 caused **60%** of First Adopters and **40%** of Later Adopters to buy and/or try new or different devices, apps or technology-driven services that they hadn't used before.



41% of First Adopters and **43%** of Later Adopters are using technology more than they did before the pandemic and having to shelter in place.



50%
of all respondents said the onset of COVID-19 caused them to use and depend on technology more. This indicates that the increased need for technology while sheltering in place has changed their relationship with tech overall, creating new habits and greater long-term reliance on tech.





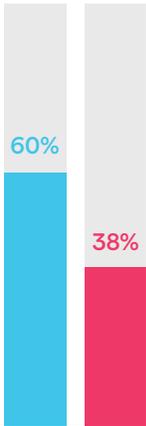
Consumers identified top reasons that are influencing their longer-term tech adoption:		FIRST ADOPTERS	LATER ADOPTERS
	Maintaining communication with friends and family	41%	52%
	Working from home	36%	36%
	Quality of life	40%	35%

The Influx of the Later Adopters

Data from the study shows that the recent spike in technology use may not be a temporary behavioral change. Forced to find new solutions for life's daily tasks, Later Adopters are becoming more comfortable with buying and using new devices, applications and tech-driven services. In particular, the Early Majority cohort see themselves continuing to adopt new technology (48%) in the future – at a pace that is almost 30% faster than before (37%) the pandemic.

Since the onset of COVID-19, a significant portion of US consumers are saying they have become more open to adopting new technologies than they were before.

- First Adopters: 60%
- Later Adopters: 38%

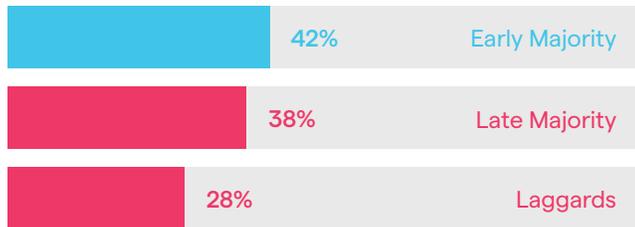


Once the COVID-19 crisis subsides, 76% of First Adopters and 41% of Later Adopters said they are likely to continue buying and trying new devices, apps or technology-driven services.



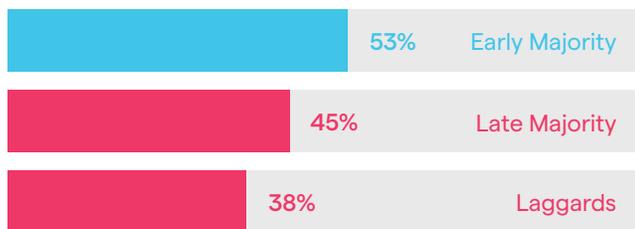
Early Majority: Joining The Ranks of Early Adopters

Increased technology use can create new habits and dependencies, potentially changing consumer preferences moving forward. The largest group of consumers surveyed self-identified as Early Majority at 37%. Just behind the First Adopters in terms of adoption, they describe themselves as that next wave of buyers waiting for new devices, applications and services to become more popular or later versions to be released. A deeper analysis of Early Majority consumers indicates their potential to shift left on the adoption curve and join the ranks of Early Adopters:



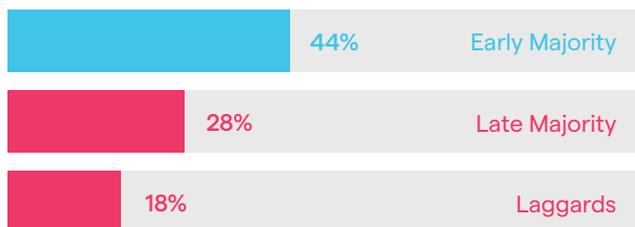
New technology use surged among Early Majority consumers with the onset of COVID-19...

42% of the Early Majority said the onset of COVID-19 increased their new technology adoption.



...And they acknowledge increased dependency on technology since the onset of COVID-19.

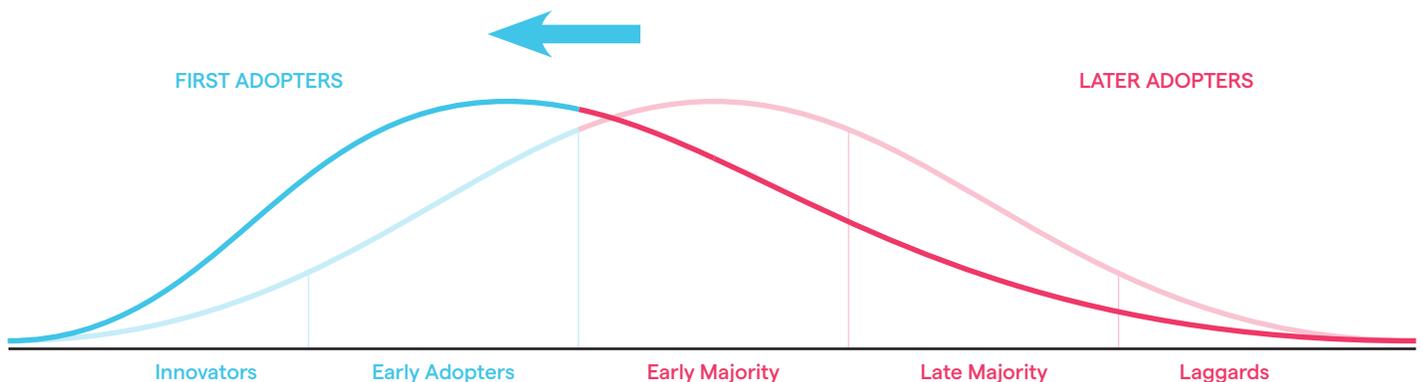
53% of the Early Majority said the onset of COVID-19 and shelter in place caused an increase in their use and reliance on tech.



Sheltering in place resulted in a shift from consumers' past adoption patterns.

44% of the Early Majority are more likely now to purchase and use new technology than they were before.

As the COVID-19 crisis eventually subsides, consumers across all cohorts are demonstrating an increased likelihood to continue buying and trying new devices, apps or technology-driven services, potentially shifting the adoption curve toward First Adopters:



All Technologies For the Win

While gaming and entertainment products, as well as wearable devices, were identified as two of the top categories of interest pre-COVID-19, the rapid shift from life as usual to sheltering in place brought other new technologies into the mainstream — particularly devices, apps or services that consumers weren't using or had little interest in before. But, the data shows that no one type of technology truly dominated consumers' share of use. Consumers demonstrated an increased use of all technologies to some degree.

During the onset of COVID-19:



44% of First Adopters and **59%** of Later Adopters said they've started buying and/or using virtual communications tools and services, such as Zoom, FaceTime, Webex, Facebook Portal and others.



Online delivery services weren't far behind, as **41%** of First Adopters and **44%** of Later Adopters said they've started utilizing Postmates, UberEats, GrubHub or other grocery delivery options.

In a post COVID-19 world:



30% of First Adopters and **32%** of Later Adopters were MOST interested in trying or continuing to use online delivery services.



29% of First Adopters and **40%** of Later Adopters were also most interested in trying, adopting or continuing to use virtual communications tools and services.



25% of Later Adopters were also interested in health and wellness technologies like Peloton bikes, health wearables and other digital health tools.

And the anticipated adoption of technology wasn't limited to products and services the respondents are using or familiar with today. When asked about embracing future tech, they indicated willingness to consider more advanced tech than online video chat platforms or food delivery.

Into the Future: Top 4 Emerging Technologies That Consumers Would be Most Open to 3-5 Years from Now		FIRST ADOPTERS	LATER ADOPTERS
	Personal augmented reality (AR) devices (like smart glasses or smart contact lenses)	41%	48%
	Artificial Intelligence	39%	36%
	Driverless cars	35%	34%
	Robots	24%	28%

The Pandemic's Lasting Effect on Technology Adoption

The increased use and dependence on technology from the COVID-19 crisis ultimately created a positive impact on consumer attitudes toward buying and using new devices, applications and services. This trend also translated to more favorable views of technology brands and the overall technology industry, potentially for years to come.

Nearly all of the respondents (90%) said their attitudes toward the technology industry and technology brands have become more positive or stayed the same since the onset of COVID-19.

In fact, nearly half (49%) of First Adopters and a third (32%) of Later Adopters have become more positive toward the technology industry and technology brands since the onset of COVID-19.

Among younger respondents (ages 18-29), half (50%) had a more positive attitude toward the technology industry and brands – the highest of any age group.

With technology use surging among most consumers, their opinions on the focus of innovation in today's world appear to be influenced by the global health crisis.

What should the focus of innovation be in today's world?		FIRST ADOPTERS	LATER ADOPTERS
	Health, medicine and safety	34%	38%
	More purpose and serving a greater good	33%	36%
	Security and privacy	32%	38%

Conclusion

It's clear the COVID-19 pandemic caused both First Adopters and Later Adopters to embrace technology in new ways and frequencies, impacting each group to differing degrees. Technology adoption by individuals who already considered themselves to be First Adopters accelerated, while those traditionally less-enthused about new technologies have started to take on an early adoption mentality.

In the midst of an economic crisis, the consumer technology industry will be interested to see leading indicators that this surge in technology adoption and use may result in permanent and lasting behavioral change. With over half (57%) of all consumers saying they're likely to continue buying and trying new devices, applications and services in the future, we can expect this sentiment to continue past the context of the COVID-19 crisis.

This trend of consumer acceptance and engagement signals similar sentiment for the next generation of emerging technologies such as AR, VR, AI, etc. If consumers are willing to try and use the technologies of today, they will be more open to the innovative devices, applications and services that will be introduced to the market three to five years from now.

A short period of intense need for technology has the potential to create lasting habits, dependencies and desires. While today's innovation is serving consumers well in a challenging environment, a worldwide feeling of solidarity has resulted from these shared challenges, initiating the widespread desire for more purpose in innovation.

Speaking to higher purpose, consumers are calling on technology companies to focus more on serving the greater good — to put health, medicine, safety as well as privacy before less pressing needs — a welcome shift that could result in a new era of innovation and in turn, a new, stronger base of consumers.

Methodology

Mojo Vision surveyed over 2,000 consumers in June 2020. This survey was completed online and responses were random, voluntary and anonymous.

About Mojo Vision

Mojo Vision is the Invisible Computing Company, dedicated to developing products and platforms that re-imagine the intersection of ideas, information and people. Instead of being tethered to devices that are increasingly a distraction in many aspects of our lives, Mojo envisions delivering information and knowledge that is immediate, but without the disruption of traditional devices. Mojo is inventing the future of computing—Invisible Computing—which imagines a world where information is there when you need it, technology fades away, and you can freely connect with others in a more meaningful and confident way. Founded by technology experts with decades of experience developing pioneering products and platforms and backed by some of the world's leading technology investors, Mojo believes the future is invisible. Mojo Vision is based in Saratoga, CA.

