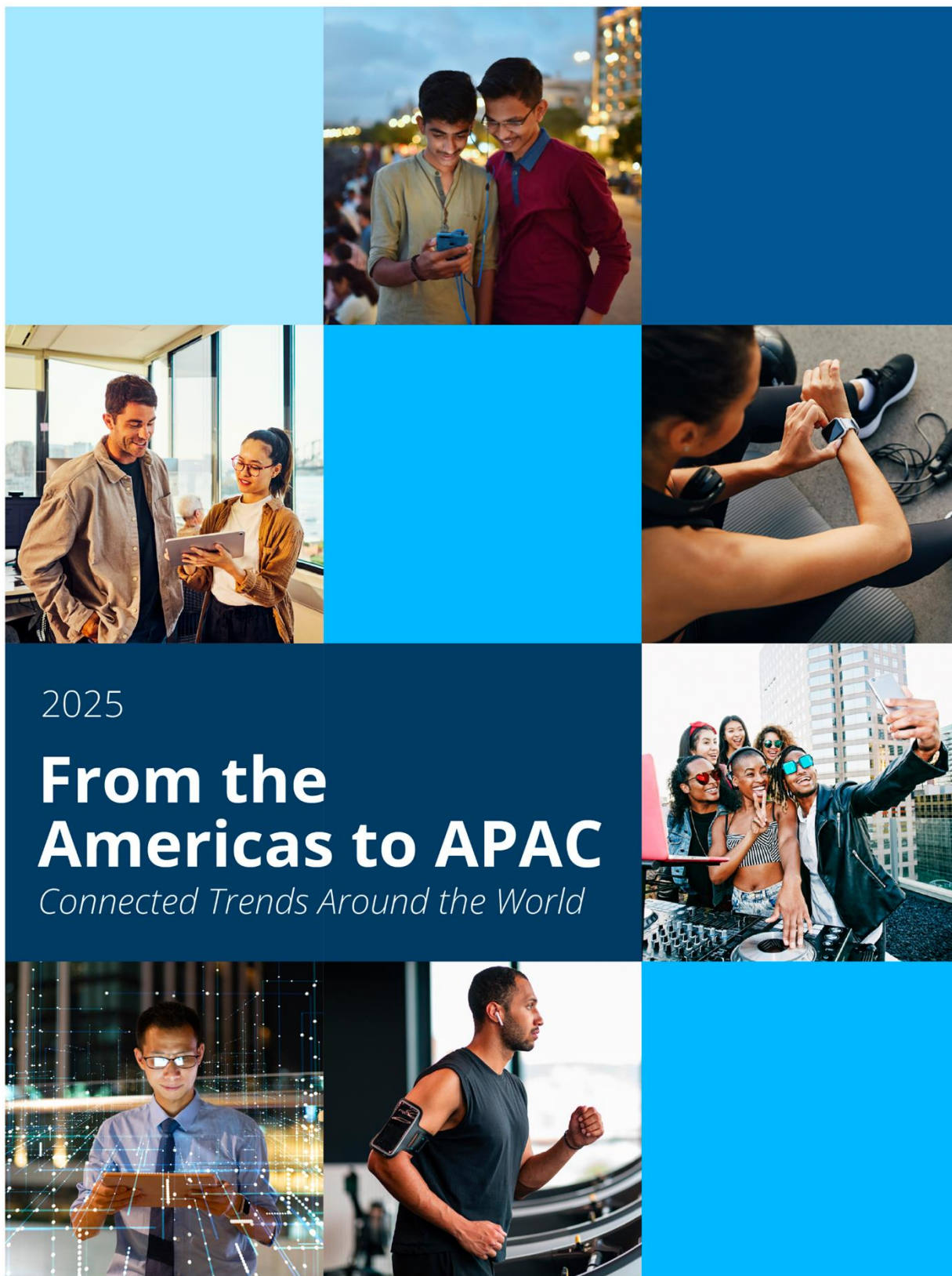




Foreword

By Federico Bunge, President, International at Assurant

Global trends in Connected Technology and Assurant's role in an evolving ecosystem.

At Assurant, we closely monitor global trends in connected technology—such as 5G and artificial intelligence—to identify strategic opportunities that drive growth for our partners in the connected lifestyle ecosystem. As these technologies reshape consumer behavior, our insights become essential for mobile operators, retailers, manufacturers, and service providers.

Our Connected Decade 2025 study covers nine key markets in the Americas, Europe, and Asia-Pacific: Brazil, Canada, Mexico, Australia, South Korea, Japan, India, Germany, and the United Kingdom. This analysis reveals common patterns and significant differences in technology adoption, highlighting concrete opportunities to add value through support, protection, service, and sustainability solutions.

Consumers in India lead in connectivity with an average of 12.9 connected devices, followed by Mexico (10.7) and Brazil (10.4). Interest in acquiring new smart technology is high across all countries, with India (97%), Mexico (95%), and Brazil (93%) leading the way. However, this connectivity also brings challenges: 91% of Indian and Mexican consumers report difficulty connecting new devices to Wi-Fi, underscoring the need for reliable technical support solutions.

Perceptions of AI's future impact vary widely: while 74% of Indians view it positively, only 25% of Canadians share this view. Still, awareness of AI integration in devices is high across all markets, exceeding 85% in most countries.

In this context, Assurant positions itself as a strategic partner that helps brands overcome barriers to technological adoption. We do this through device protection programs, advanced technical support, and trade-in and refurbishment solutions that not only improve the customer experience but also promote sustainability. In fact, by 2024, we reused more than 185 million devices globally.

Consumers increasingly value extended warranties, on-demand technical support, and the environmental benefits of refurbished devices. In markets like Mexico, 42% show high interest in this option, while in South Korea and Germany, interest is also growing, especially among younger generations.

This report offers a comprehensive view of consumer attitudes and expectations around connected technology. We invite our partners to explore these findings and work with us to design solutions that drive adoption, strengthen customer loyalty, and generate a positive impact on both business and the planet.

Federico Bunge
President, International
Assurant

Research Methodology

Survey included a representative sample of 1,000 smartphone owners per country (Australia, Brazil, Canada, Germany, Japan, India, Mexico, South Korea and UK). Response data captured using online surveys in January 2025.

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Consumer feedback by country



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Australia



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Brazil



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Canada



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Germany



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India



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Japón



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Mexico



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South Korea



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United Kingdom



How consumers stay connected today **shapes our understanding** of their motivation to **purchase smart technology** and the factors that **influence their decisions**.

8.1

Average number of connected devices owned

The **Essential Role** of
Connected Devices
in daily living

83%

Smartphones

51%

Laptop

46%

Internet-connected TV

31%

Desktop computer

30%

Headphones

**84%**Plan to buy a
5G / AI new
smartphone**68%**Plan to purchase
new smart technology in
the next year**50%**Of consumers are more
likely to buy a connected
device if it comes with
value-added servicesBuy a
refurbished
device**24%**

T2B: Extremely + Very Interested

70%

Who are interested

Yet, this journey often encounters **difficulties and pain points** consumers experience when purchasing and using connected technology.

63%Have experienced
frustrations when buying
or owning consumer
electronics or appliances**60%**Have experienced
problems connecting new
or replacement devices
to home WI-FI for the first
time in the last year

Looking ahead, the future of this connection hinges on assessing consumer AI literacy and their anticipated **future impact of the technology on their lives**.

86%Awareness about AI
integration in Smart
Device**29%**Perceived Future
Impact of AI
Mostly Positive



How consumers stay connected today **shapes our understanding** of their motivation to **purchase smart technology** and the **factors that influence their decisions.**

10.4Average number
of connected
devices ownedThe **Essential Role** of
Connected Devices
in daily living**84%**

Smartphones

69%

Internet-connected TV

58%

Laptop

52%

Headphones

46%

Desktop computer

**95%**Plan to buy a
5G / AI new
smartphone**93%**Plan to purchase
new smart technology in
the next year**70%**Of consumers are more
likely to buy a connected
device if it comes with
value-added servicesBuy a
refurbished
device**35%**

T2B: Extremely + Very Interested

77%

Who are interested

Yet, this journey often encounters **difficulties and pain points** consumers experience when purchasing and using connected technology.

66%Have experienced
frustrations when buying
or owning consumer
electronics or appliances**69%**Have experienced
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Device**65%**Perceived Future
Impact of AI
Mostly Positive



How consumers stay connected today **shapes our understanding** of their motivation to **purchase smart technology** and the **factors that influence their decisions**.

8.2

Average number of connected devices owned

The **Essential Role** of **Connected Devices** in daily living

80%

Smartphones

51%

Laptop

48%

Internet-connected TV

32%

Desktop computer

30%

Tablet or eReader



86%

Plan to buy a 5G / AI new smartphone



69%

Plan to purchase new smart technology in the next year



45%

Of consumers are more likely to buy a connected device if it comes with value-added services

Buy a refurbished device

22%

T2B: Extremely + Very Interested

68%

Who are interested

Yet, this journey often encounters **difficulties and pain points** consumers experience when purchasing and using connected technology.

63%

Have experienced frustrations when buying or owning consumer electronics or appliances

53%

Have experienced problems connecting new or replacement devices to home WI-FI for the first time in the last year

Looking ahead, the future of this connection hinges on assessing consumer AI literacy and their anticipated **future impact of the technology on their lives**.

86%

Awareness about AI integration in Smart Device

25%

Perceived Future Impact of AI Mostly Positive



How consumers stay connected today **shapes our understanding** of their motivation to purchase smart technology and the factors that influence their decisions.

7.7

Average number
of connected
devices owned

The **Essential Role** of
Connected Devices
in daily living

82%

Smartphones

51%

Laptop

43%

Internet-connected TV

32%

Desktop computer

27%

Headphones

**84%**

Plan to buy a
5G / AI new
smartphone

**69%**

Plan to purchase
new smart technology in
the next year

**32%**

Of consumers are more
likely to buy a connected
device if it comes with
value-added services

Buy a
refurbished
device

33%

T2B: Extremely + Very Interested

77%

Who are interested

Yet, this journey often encounters **difficulties and pain points** consumers experience when purchasing and using connected technology.

49%

Have experienced
frustrations when buying
or owning consumer
electronics or appliances

59%

Have experienced
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or replacement devices
to home WI-FI for the first
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Looking ahead, the future of this connection hinges on assessing consumer AI literacy and their anticipated **future impact of the technology on their lives.**

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Impact of AI
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How consumers stay connected today **shapes our understanding** of their motivation to **purchase smart technology** and the **factors that influence their decisions**.

12.9Average number
of connected
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Smartphones

74%

Laptop

69%

Headphones

64%

Internet-connected TV

56%

Smart watch

**99%**Plan to buy a
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device**29%**

T2B: Extremely + Very Interested

88%

Who are interested

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Mostly Positive

Japan



How consumers stay connected today **shapes our understanding** of their motivation **to purchase smart technology** and the factors **that influence their decisions.**

7.4

Average number of connected devices owned

The **Essential Role** of **Connected Devices** in daily living

86%

Smartphones

52%

Laptop

23%

Desktop computer

23%

Internet-connected TV

20%

Tablet or eReader



89%

Plan to buy a 5G / AI new smartphone



74%

Plan to purchase new smart technology in the next year



32%

Of consumers are more likely to buy a connected device if it comes with value-added services

Buy a refurbished device

20%

T2B: Extremely + Very Interested

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Who are interested

Yet, this journey often encounters **difficulties and pain points** consumers experience when purchasing and using connected technology.

54%

Have experienced frustrations when buying or owning consumer electronics or appliances

43%

Have experienced problems connecting new or replacement devices to home Wi-Fi for the first time in the last year

Looking ahead, the future of this connection hinges on assessing consumer AI literacy and their anticipated **future impact of the technology on their lives.**

77%

Awareness about AI integration in Smart Device

40%

Perceived Future Impact of AI Mostly Positive



How consumers stay connected today **shapes our understanding** of their motivation to purchase smart technology and the factors that influence their decisions.

10.7

Average number of connected devices owned

The **Essential Role** of
Connected Devices
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79%

Smartphones

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Internet-connected TV

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Laptop

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Headphones

35%

Desktop computer

35%

Smart watch

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value-added servicesBuy a
refurbished
device**42%**

T2B: Extremely + Very Interested

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The **Essential Role** of **Connected Devices** in daily living



Plan to buy a 5G / AI new smartphone



Plan to purchase new smart technology in the next year



Of consumers are more likely to buy a connected device if it comes with value-added services



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About Assurant

Assurant, Inc. (NYSE: AIZ) is a leading global business services company that supports, protects, and connects major consumer purchases. A Fortune 500 company with a presence in 21 countries, Assurant supports the advancement of the connected world by partnering with the world's leading brands to develop innovative solutions and to deliver an enhanced customer experience through mobile device solutions, extended service contracts, vehicle protection services, renters insurance, lender-placed insurance products, and other products.

Learn more at www.assurant.co.kr

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From the Americas to APAC: Connected Trends Around the World