NielsenIQ

powered by GfK intelligence

# Consumer Tech Trends 2027

*Executive summary*



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# The emergence of justified consumption


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# The mindset shift

Consumers are price-sensitive, but they aren't simply buying cheap.

**63%**
of global T&D buyers have high price sensitivity

**60%**
prioritize brands that offer good value for money

| | | |
|---|---|---|
| #1 | **Durability** | Value driver |
| #2 | **High quality** | Value driver |
| #3 | **Makes life easier** | Value driver |
| #4 | **Trusted brand** | Value driver |
| #8 | **Inexpensive** | Lower-ranked price cue |



*"Will I feel this purchase was worth it six months from now?"*

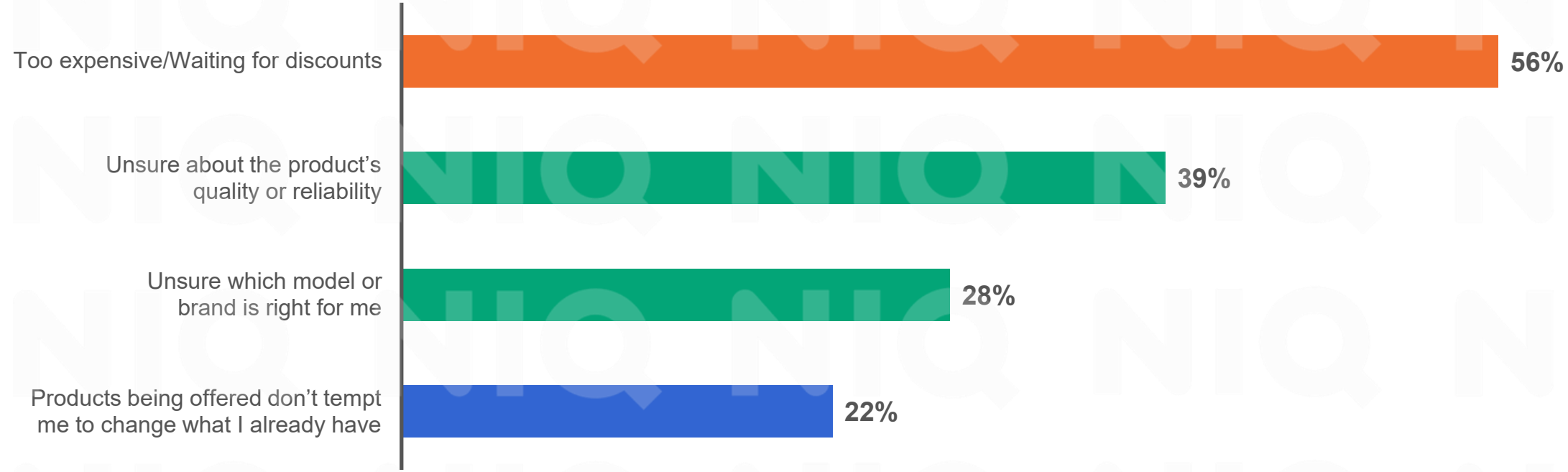
**Implication:** Growth depends on making the purchase feel obvious and defensible. Affordability triggers shoppers' consideration, but value proof closes the decision. Marketing should lead with lifetime value and proof points—price alone is not a sustainable strategy.


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# Consumers want to avoid regret

The purchase hurdle is emotional, as well as financial.

**Have any of the following ever delayed your decision to buy consumer tech or home appliances?**




**Implication:** Brands need a "confidence architecture" that addresses the question, "Will I feel this purchase was worth it six months from now?" Price for confidence, not just competition.

Source: NIQ Consumer Tech & Durable Goods consumer survey 2026


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# The new growth equation

## Old

Innovation breadth + distribution scale + promotions

= growth

## New

Relevance + proof + trust + comparability + low-risk ownership

= growth

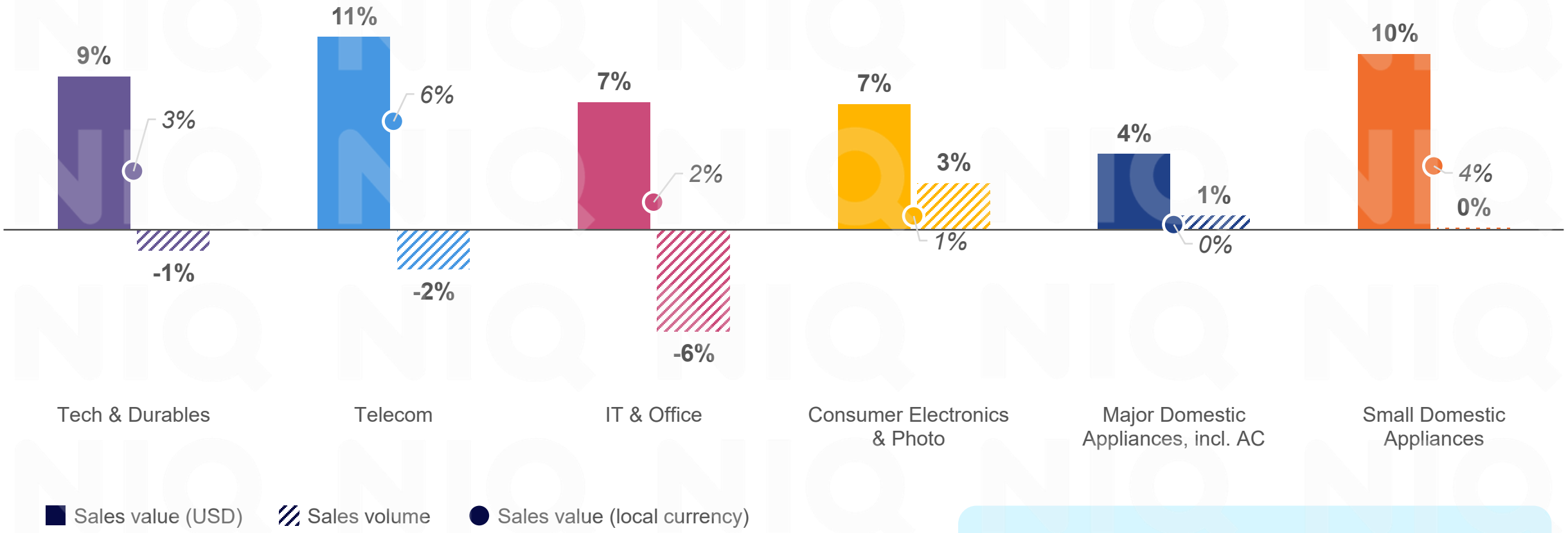
**Implication:** Communication of tangible value is now a revenue lever, not solely a messaging layer.



# Market reality

Global T&D value is growing, but volume is selective. Growth is partly price/currency-led, not always demand-led.

***Global (excl. North America and Russia) Tech & Durables sales growth rate, Q1 2026 vs. Q1 2025***




**Implication:** Separate “real demand” from inflation, FX, and pricing effects.

Source: NIQ GfK Market Intelligence: Sales Tracking, International coverage (excl. North America and Russia); Sales revenue growth, January–March 2026 vs. same period the previous year; Channel coverage: Retail. Consumer Electronics includes Multifunctional Technical Devices/Dry Batteries; Small Domestic Appliances includes Personal Diagnostics.


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# Category growth outlook for full-year 2026

Global T&D sales are forecast to reach **$1.4 trillion (USD)** in 2026—up **5.1%** year over year.

**NIQ market estimates for full-year 2026:**

**Global (excl. Russia) T&D value growth (USD) vs. 2025**




**Implication:** Premiumization works where benefits are visible: time saved, performance, hygiene, convenience, futureproofing.

Source: NIQ GfK Market Intelligence: Sales Tracking; Total market estimation incl. North America, based on USD; Forecasting date: May 15, 2026, assuming stable USD exchange rate. North America estimation based on cooperation with the Consumer Technology Association (CTA).


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# NIQ's market estimation for full-year 2026 sales value growth vs. 2025



## Telecom +8%

- ***Apple's significant positive launch effects*** have ***boosted Telecom dynamics***. The Samsung launch has helped, but not to the same extent as the Apple launch.
- ***Europe is entering a new churn cycle*** after two weaker years. We already see it with the Apple launch.
- ***China's 2026 outlook has been modified to "mild positive." Fading subsidies and high 2025 baseline effects*** will dampen domestic growth and weigh on global growth expectations, but the uplift from premium new launches was strong in Q126.
- ***Developed Asia***, where premiumization drives strong revenue increases, may be impacted by inflation due to the war.



## Small Domestic Appliances +7%

- Consumers will ***cautiously spend a premium on innovative, multi-functional products*** that offer greater convenience.
- Prices will increase in 2026 if ***geopolitical volatility persists*** and may continue to rise due to innovation and new multifunctional/ smart SKUs at premium price points. Hero categories continue to grow.
- Chinese subsidies have boosted sales in 2025, but they will have a negative impact on 1HY26 due to ***high baselines and front-loading of demand in 2025***.




## Major Domestic Appliances +3%

- Relatively ***cautious purchase behavior is expected to persist***, limiting upgrades—especially as oil price hikes fuel inflation.
- High Q1–Q3 2025 baselines due to Chinese ***subsidies are expected to impact growth negatively***. Consequently, China's appetite for more premium and offline sales is likely to reduce and normalize.
- ***Volume growth will be up slightly*** due to replacement demand. Premium sales (e.g., via new design features) will pick up outside of China.

**General remark on USD foreign exchange rate impact:**

As the USD depreciated significantly from Q2 2025 to Q1 2026, USD growth rates are elevated (e.g., for Q1 2026, growth in USD is almost 6 percentage points higher than growth in local currency). This effect will fade in coming quarters but will still affect the full-year basis. **The forecast in USD has therefore been adjusted upwards.**


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# NIQ's market estimation for full-year 2026 sales value growth vs. 2025



## Consumer Electronics & Photo
+2%

- ***Consumer Electronics market is saturated***. However, promotional sales ahead of World Cup 2026 in North America are expected to increase demand.
- ***Major volume slowdown in Audio*** will constrain the gains in value from premium sales and foreign exchange effects, despite some high-performing segments such as ***open-ear*** and ***wireless headbands***.
- ***Photo growth is the most positive in CE*** and strong worldwide. However, camera sales in China slowed significantly in Q1 after high baselines from subsidy effects.



## Information Technology & Office
+2%

- ***PC market growth will decelerate but remain slightly positive into 2026***, supported by residual late-cycle replacements and the tail end of the Windows 10 refresh.
- ***Elevated device prices driven by the ongoing global memory shortage*** are expected to sustain overall value growth even as volumes soften.
- ***China's 2026 outlook is negative due to high 2025 baseline effects***, which will dampen domestic growth and weigh on global growth expectations.

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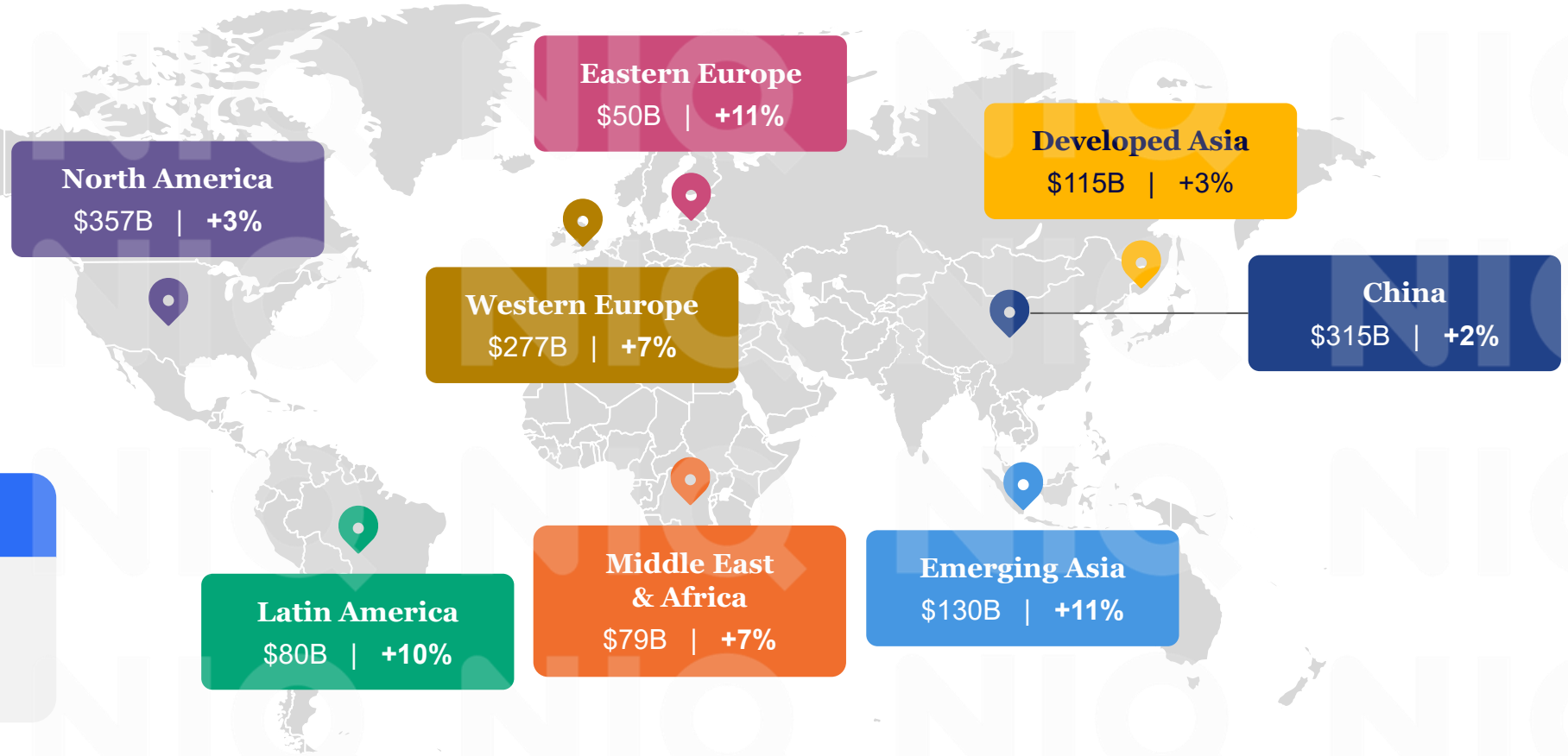
# Six routes to growth in the justified consumption era


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# 1. Regional growth strategy

## 2026 growth is strongest where adoption and confidence still have room to rise

**2026 full-year market estimate: T&D value growth (USD) year over year (YoY)**




**Global T&D 2026 forecast**

**Turnover:** $1.4 trillion

**Growth rate:** **+5.1%**

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# 1. Regional growth strategy

Market prioritization should guide product, pricing, and channel investment.



## Mature profit pools

**North America and Developed Asia**

Focus on margin, premium replacement, loyalty, and services



## Scale plus momentum

**Western Europe and China**

Focus on portfolio precision, premiumization, and innovation localization



## High-growth engines

**Eastern Europe, Emerging Asia, LATAM, and MEA**

Focus on access, affordability, channel expansion, and open ecosystems

**Implication:** Global strategy must define each region's role: margin, scale, adoption, or innovation learning.


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## 2. Price for confidence

Consumers are looking for an *unregretted* price. That's not the same as cheap.

**56%** **delayed buying** because the product was too expensive or they were waiting for discounts

**39%** **delayed buying** because they were unsure about the product's quality or reliability

- Price must feel fair in the context of quality, features, warranty, reviews, and brand reputation.
- A discount can trigger action, but trust is what removes the risk of "purchase regret."

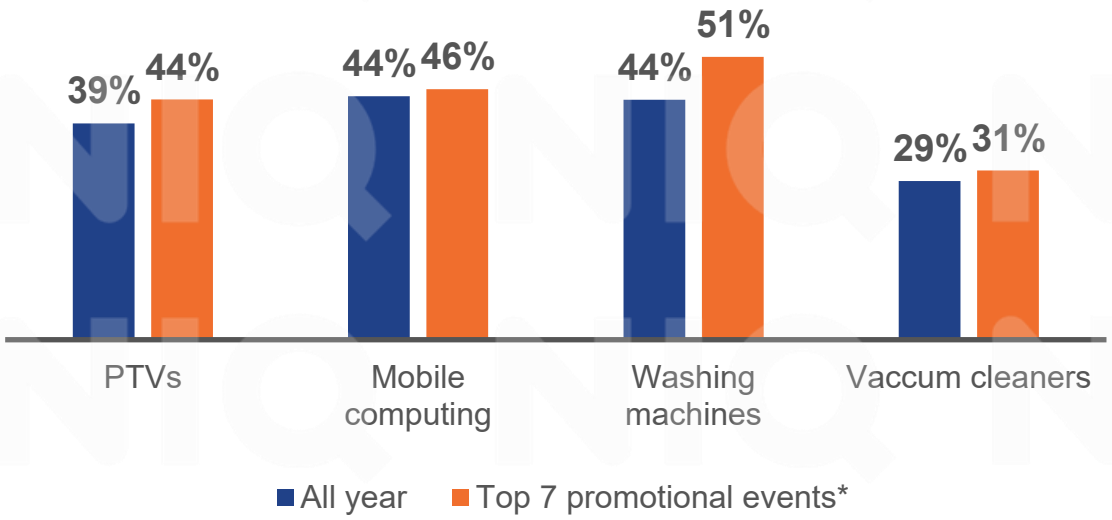


Source: NIQ Consumer Tech & Durable Goods consumer survey 2026

# 2. Price for confidence

Consumers are trading up during price promotions because they get better value by doing so.

**Did you spend more or less than you initially planned on your new product?**




**Implication:** Pair price with warranty, reviews, returns, brand trust, and lifetime value proof.

Source: NIQ gfknewron Consumer, Last four quarters (Q4 2024–Q3 2025); Countries: Austria, Belgium, Brazil, France, Germany, Great Britain, Italy, India, Japan, Netherlands, Poland, Spain, Switzerland, and Türkiye. *Top seven promotional events: Amazon Prime Days, Black Friday, Christmas sales, Cyber Monday, January/New Year's sales, Mother's Day sales, International Women's Day, Back to School.

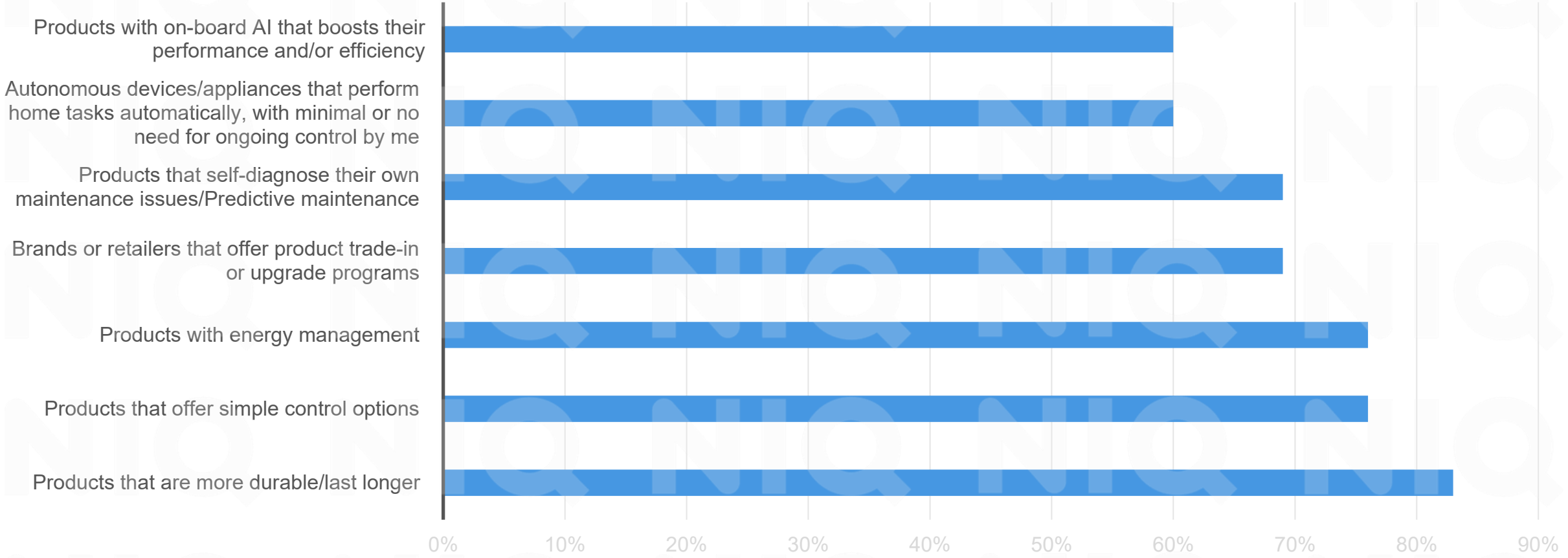




# 3. Innovate where benefits are visible and relevant

Future demand is coalescing around practical, outcome-driven innovation.

**Thinking about possible future purchases, how interested are you in the following? *(Very or somewhat interested)***




Source: NIQ Consumer Tech & Durable Goods consumer survey 2026


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# 3. Innovate where benefits are visible and relevant

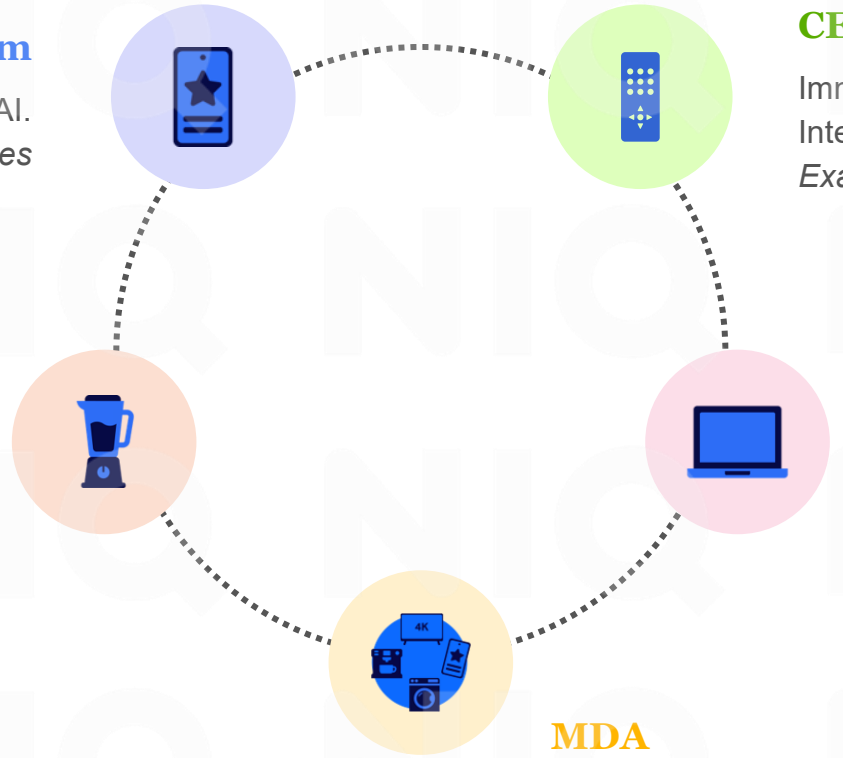
Visible, relevant benefits have the power to unlock premium spend across categories.

**Telecom**

Futureproofing. Performance. AI.
*Example: 256GB+ smartphones*

**CE**

Immersive experience. Performance. Interoperability.
*Example: 75-inch+ TVs*



**SDA**

Interoperability. Time savings. Convenience. Performance.
*Examples: Robot vacuums, wet/dry vacuums, pump espresso*

**IT**

Performance. Comfort of use.
*Examples: High refresh rate monitors, NVMe SSDs, gaming PCs*

**MDA**

Energy efficiency. Hygiene. Convenience.
*Examples: Hobs with integrated hoods, flex induction, steam washers*

**Implication:** Replace feature-led claims with outcome-led claims, such as lower bills, better performance, easier setup, open interoperability, and/or healthier routines.


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# 4. Build low-risk ownership models

Ownership is being redefined around the lifetime value: durability, running costs, repairability, refurb, resell value, trade-in, and end of life.

**Which of the following would make you more willing to buy a refurbished/renewed product?**



**51%**
Strong warranty



**42%**
Meaningful discount vs. new



**40%**
Easy return if not satisfied



**39%**
Certified testing

**Trade-in is an unmet need hiding in plain sight**



**25%**
currently trade in old products with a retailer



**64%**
say trade-in options are important in deciding what to buy next

**Implication:** Low-risk ownership can expand the buyer pool and create repeat engagement. Drive value via warranty, repair, refurb, trade-in, and/or recycling.

Source: NIQ Consumer Tech & Durable Goods consumer survey 2026


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# 5. Competitive dynamics are shifting

Consumers remain focused on price but are placing increasing weight on factors that boost purchase confidence—including brand reputation.

**How much do the following influence your final decision on which consumer tech and home appliance products to buy?**
*(Strong or very strong influence)*

**75%** **Clear information** detailing product features and performance *(#1 of all options given)*

**73%** **Price promotion** or discount (quality at a good price) *(#2 of all options given)*

**71%** Comes with a **warranty**

**70%** **Brand reputation**



Source: NIQ Consumer Tech & Durable Goods consumer survey 2026

# 5. Competitive dynamics are shifting

The undifferentiated middle is most exposed to down-trading and switching.



**Value tier**

Wins through affordability plus credible basics



**Squeezed middle**

At risk when price isn't low and benefits aren't obvious



**Justified premium**

Wins through proof of superior outcomes, quality, and trust

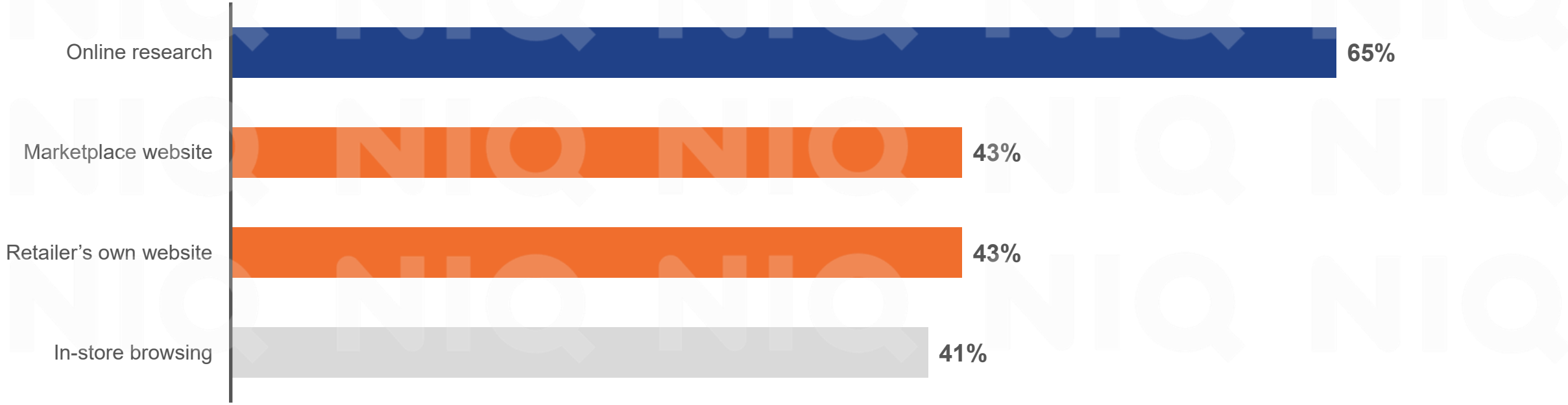
**Implication:** Every product tier must have a clear and differentiated reason to exist, with messaging that makes the price-to-value obvious.


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# 6. Position for AI-driven discovery

Many consumers claim their T&D research *starts* online. AI-powered search is increasingly likely to shape consideration in these channels.

**When you research consumer tech and appliances, where do you typically start your research?**




**Implications:** As AI-powered search becomes an increasingly important shopping gateway, brands should optimize for both people and algorithms by making their product value structured, searchable, comparable, and obvious.

Source: NIQ Consumer Tech & Durable Goods consumer survey 2026


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# The executive call to action


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# The next battleground is winning confidence, not just attention

The brand that makes the decision easiest to justify earns the sale.

## Shift from “innovation-led” to “justification-led” growth

Innovation still matters—but it must be tangible, demonstrable, and value-justified. Messaging must create confidence to address consumers’ primary question: “Will I feel this [purchase] was worth it six months from now?”

## Compete on total value, not headline price

Winning brands will focus on:

- Product durability and lifetime cost economics
- Tech interoperability and ecosystems focused on time saved, energy efficiency, and productivity gains
- Transparent feature communication (especially for AI-enabled products)

## Design for polarized demand: Deliver value clarity or premium proof

Expect bifurcation:

- Growth in entry-level and value tiers
- Selected growth in premium products that offer clear value, utility, and differentiation
- Pressure on the mid-tier “undifferentiated middle”


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# The next battleground is winning confidence, not just attention

The brand that makes the decision easiest to justify earns the sale.

## Treat promotions as strategic demand architecture

With **35%** of total T&D sales value tied to the top seven annual promotional events:

- Promotion strategy should be viewed as core to growth, not tactical
- Inventory and supply chain strategy should be designed to respond to spiky demand patterns where promotional events materially affect sales

## Optimize for algorithmic discovery, as well as human search

As AI becomes a purchase gateway:

- Product data quality, comparability, and visibility are critical
- Brands must optimize their online presence for machine-readable differentiation

Source: NIQ GfK Market Intelligence: Sales Tracking Weekly Data, January–December 2025. Top seven promotion events: Amazon Prime Days, Black Friday, Christmas sales, Cyber Monday, January/New Year's sales, Mother's Day sales, International Women's Day, Back to School.


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