KPMG

Ignition

Context for Change

October 2023

Executive Summary

Balancing Innovation and Responsibility in Tech

Consumers **crave progress** but **also demand safeguards**.

To succeed in this dynamic market, **companies should tread thoughtfully**, **embracing technology trends with the potential for positive impact** while **prioritizing security by putting the appropriate guardrails in place**.

The future favors those skillfully navigating the **delicate balance between innovation and responsibility**, guiding consumers on a journey where comfort and excitement coexist.

Ignition

Detailed Findings

KPMG

Climate Tech, Med Biotech, and Generative AI...

…are trends that hold the most promising potential for optimism. When comparing city-level data, polarity varies, with some cities expressing less positivity and others exhibiting a more positive sentiment towards Generative AI.

Trend with Most Positive Potential for Optimism	Total	Atlanta	Austin	Balti-more*	Boston	Chicago	Dallas/ Ft Worth	Denver	LA/ Orange County	Madison*	Minnea polis/ St Paul	NY Metro	Phila-delphia	Phoenix	Portland	Raleigh-Durham*	Salt Lake City*	San Diego	SF Bay	Seattle	Washington DC
		KPMG			KPMG	KPMG	KPMG	KPMG	KPMG			KPMG			KPMG					KPMG	KPMG
Climate Technology	23%	19%	20%	27%	26%	20%	15%	22%	20%	16%	20%	15%	16%	32%	18%	27%	25%	31%	32%	36%	28%
Medical Biotechnology	18%	24%	19%	18%	21%	18%	18%	19%	17%	11%	20%	18%	19%	19%	33%	21%	24%	10%	8%	13%	14%
Generative AI	18%	19%	9%	12%	20%	10%	31%	20%	17%	44%	27%	22%	19%	10%	9%	7%	14%	16%	23%	17%	22%
Remote Work	16%	13%	17%	22%	13%	24%	17%	16%	22%	16%	12%	17%	20%	12%	20%	20%	14%	10%	15%	6%	10%
Metaverse	6%	4%	10%	2%	2%	7%	3%	6%	9%	0%	6%	4%	8%	8%	2%	6%	1%	16%	7%	9%	9%
Space Exploration	6%	7%	9%	7%	6%	2%	4%	3%	3%	3%	4%	12%	7%	10%	2%	9%	13%	2%	3%	10%	1%
Synthetic biology	5%	7%	8%	2%	3%	2%	5%	7%	6%	4%	3%	1%	3%	5%	3%	5%	9%	5%	4%	6%	6%
Quantum	4%	4%	4%	5%	5%	4%	3%	3%	2%	4%	1%	6%	3%	2%	5%	3%	0%	5%	7%	2%	7%
Web3	3%	1%	3%	4%	1%	12%	2%	5%	4%	2%	5%	3%	1%	1%	3%	2%	0%	6%	2%	0%	1%
Other	1%	1%	2%	0%	3%	0%	1%	0%	0%	1%	1%	1%	2%	2%	6%	1%	0%	0%	1%	0%	1%

Tech and work comfort levels are varied…

…with individuals in Boston showing less comfort in adopting new technology at work, while those in Dallas, Seattle, and Washington DC embrace the evolving landscape of emerging tech advancements in the workplace.

Tech & Work Comfortability (T2B) KPMG	Total	KPMG Austin	KPMG Boston	KPMG Chicago	KPMG Dallas/ Ft Worth	KPMG Denver	KPMG LA/ Orange County	KPMG NY Metro	KPMG Raleigh-Durham*	KPMG Seattle	KPMG Washington DC
Online learning platforms offer new skill sets and professional development opportunities	68%	68%	59%	63%	70%	64%	58%	52%	72%	80%	79%
Collaborative platforms facilitate remote work and virtual meetings with others	62%	63%	64%	61%	70%	56%	52%	53%	62%	72%	71%
Technology automates your repetitive tasks, such as data entry or scheduling	61%	59%	49%	47%	71%	64%	57%	50%	52%	70%	71%
Your computer analyzes work patterns and provides personalized recommendations for improvement	54%	52%	43%	49%	60%	59%	50%	43%	45%	68%	73%
Your email tool pre-writes all of your emails, allowing for you to approve and send communications	52%	58%	39%	41%	67%	57%	51%	44%	45%	73%	66%
AI-powered assistants or chatbots help manage workflow and prioritize tasks	51%	49%	41%	42%	65%	57%	51%	46%	29%	66%	66%
Wearable technology tracks your productivity and provides real-time feedback	51%	52%	37%	47%	60%	53%	52%	49%	35%	61%	66%
Virtual reality or other immersive technology simulates your work environments or training programs	46%	51%	34%	42%	68%	49%	45%	37%	33%	57%	56%
AI-powered performance evaluations use on algorithms to collate feedback for you	46%	52%	33%	40%	61%	61%	41%	43%	30%	54%	53%

Some markets are leading online learning…

…collaborative platforms for remote work, VR meetings, and task-automating technology, Portland stands out as a city that is less comfortable with the idea of technological advancements in the workplace.

Tech & Work Comfortability (T2B) Non-KPMG	Total	Atlanta	Balti-more*	Madison*	Minnea polis/ St Paul	Phila-delphia	Phoenix	Portland	Salt Lake City*	San Diego	SF Bay
Online learning platforms offer new skill sets and professional development opportunities	68%	70%	84%	68%	66%	67%	69%	56%	74%	82%	69%
Collaborative platforms facilitate remote work and virtual meetings with others	62%	66%	67%	61%	50%	62%	58%	60%	71%	69%	65%
Technology automates your repetitive tasks, such as data entry or scheduling	61%	65%	62%	61%	52%	55%	59%	60%	73%	75%	71%
Your computer analyzes work patterns and provides personalized recommendations for improvement	54%	69%	54%	65%	48%	49%	44%	38%	63%	64%	51%
Your email tool pre-writes all of your emails, allowing for you to approve and send communications	52%	58%	52%	47%	45%	50%	44%	26%	47%	66%	52%
AI-powered assistants or chatbots help manage workflow and prioritize tasks	51%	51%	43%	56%	46%	48%	41%	48%	50%	63%	56%
Wearable technology tracks your productivity and provides real-time feedback	51%	63%	49%	65%	41%	47%	43%	41%	48%	51%	46%
Virtual reality or other immersive technology simulates your work environments or training programs	46%	51%	38%	35%	48%	40%	45%	36%	45%	59%	42%
AI-powered performance evaluations use on algorithms to collate feedback for you	46%	59%	44%	46%	35%	42%	38%	33%	41%	50%	48%

Roughly half of consumers are open to smart assistants…

…automating household tasks and their phones adjusting schedules based on behavior data. However, there is resistance to government tracking. San Diego, Seattle, and DC embrace these technologies, while Baltimore is less comfortable with the ideas overall.

Tech & Day-to-Day Comfortability (T2B)	Total	KPMG Atlanta	KPMG Austin	KPMG Balti-more*	KPMG Boston	KPMG Chicago	KPMG Dallas/ Ft Worth	KPMG Denver	KPMG LA/ Orange County	KPMG Madison*	KPMG Minnea polis/ St Paul	KPMG NY Metro	KPMG Phila-delphia	KPMG Phoenix	KPMG Portland	KPMG Raleigh-Durham*	KPMG Salt Lake City*	KPMG San Diego	KPMG SF Bay	KPMG Seattle	KPMG Washingt on DC
Smart assistant/robot manages your household tasks, including chores and schedule management	52%	55%	54%	40%	44%	48%	55%	53%	45%	62%	45%	45%	50%	45%	42%	45%	58%	66%	48%	65%	72%
Your phone automates your schedule every day, using patterns of behavior and your data as inputs	47%	55%	54%	35%	32%	35%	63%	52%	46%	51%	37%	38%	47%	32%	32%	36%	53%	60%	45%	67%	64%
Digital character/avatar allows you to socialize with others in a digital world	43%	47%	42%	32%	36%	42%	57%	49%	43%	36%	39%	32%	33%	35%	38%	34%	44%	58%	42%	53%	60%
Government automatically tracks your identity, leaving no need for documentation management	31%	36%	27%	20%	25%	33%	44%	35%	35%	36%	15%	28%	33%	24%	16%	20%	22%	49%	24%	44%	38%

Technology that enhances purchases...

such as 5G-enabled mobile payments for faster and secure checkouts, AI-driven product recommendations based on purchase history, and immersive VR experiences, is well-received. Boston shows less comfortability with these technologies, while Dallas, Seattle, and DC are the most receptive.

Tech & Purchase Comfortability (T2B) KPMG	Total	KPMG Austin	KPMG Boston	KPMG Chicago	KPMG Dallas/ Ft Worth	KPMG Denver	KPMG LA/ Orange County	KPMG NY Metro	KPMG Raleigh-Durham*	KPMG Seattle	KPMG Washington DC
5G-enabled mobile payments allow for faster and more secure purchases	62%	67%	59%	61%	70%	54%	52%	47%	64%	68%	77%
AI assistants suggest products based on your preferences and purchase history	52%	59%	45%	51%	68%	57%	49%	45%	42%	68%	69%
Virtual experiences allow immersive ways to interact with art, culture, entertainment or gaming	52%	58%	42%	54%	66%	50%	49%	43%	54%	62%	69%
Robots or automated kiosks help you make purchases, such as in-store or at a vending machine	51%	55%	39%	50%	64%	56%	49%	36%	38%	65%	62%
Facial recognition or other biometric data authorizes purchases for you	47%	41%	31%	48%	62%	49%	41%	38%	36%	68%	61%
Virtual shopping in the metaverse allow you to explore and purchase products virtually	46%	55%	34%	41%	65%	52%	42%	42%	40%	59%	63%
AI algorithms analyze your purchases, sending you personalized recommendations, ads, and promotions	46%	52%	33%	44%	59%	52%	43%	47%	33%	60%	58%
IoT devices automatically reorders products when you run out	40%	56%	24%	39%	53%	51%	43%	33%	26%	50%	53%
Automated systems make purchases on your behalf without needing explicit approval	35%	41%	25%	32%	49%	34%	39%	37%	22%	59%	48%

There are some cities that are less comfortable...

…with emerging tech present in their purchase decisions except for Atlanta and San Diego residents who are more receptive to these supportive tech ideas when shopping.

Tech & Purchase Comfortability (T2B) Non-KPMG	Total	Atlanta	Balti-more*	Madison*	Minnea polis/ St Paul	Phila-delphia	Phoenix	Portland	Salt Lake City*	San Diego	SF Bay
5G-enabled mobile payments allow for faster and more secure purchases	62%	72%	61%	61%	59%	59%	51%	61%	61%	74%	67%
AI assistants suggest products based on your preferences and purchase history	52%	59%	44%	58%	41%	42%	36%	33%	52%	62%	50%
Virtual experiences allow immersive ways to interact with art, culture, entertainment or gaming	52%	57%	44%	43%	45%	40%	59%	35%	49%	60%	58%
Robots or automated kiosks help you make purchases, such as in-store or at a vending machine	51%	68%	46%	47%	44%	43%	43%	43%	59%	62%	50%
Facial recognition or other biometric data authorizes purchases for you	47%	55%	42%	55%	38%	38%	42%	39%	43%	68%	45%
Virtual shopping in the metaverse allow you to explore and purchase products virtually	46%	54%	37%	28%	39%	46%	35%	33%	35%	60%	45%
AI algorithms analyze your purchases, sending you personalized recommendations, ads, and promotions	46%	54%	33%	56%	34%	37%	36%	32%	44%	61%	37%
IoT devices automatically reorders products when you run out	40%	51%	22%	29%	42%	38%	31%	23%	37%	42%	36%
Automated systems make purchases on your behalf without needing explicit approval	35%	41%	30%	22%	30%	27%	24%	21%	25%	53%	25%

Nearly half of consumers are comfortable with AI algorithms for analyzing spending…

…and loan eligibility in financial management. However, cities like Philly, Phoenix, Portland, and Raleigh are less enthusiastic about tech analyzing their personal finances, whereas San Diego, Seattle, and DC display greater comfort with these concepts.

Tech & Personal Finance Comfortability (T2B)	Total	Atlanta	Austin	Balti-more*	Boston	Chicago	Dallas/ Ft Worth	Denver	LA/ Orange County	Madison *	Minnea polis/ St Paul	NY Metro	Phila-delphia	Phoenix	Portland	Raleigh-Durham *	Salt Lake City*	San Diego	SF Bay	Seattle	Washington DC
		KPMG			KPMG	KPMG	KPMG	KPMG	KPMG			KPMG				KPMG				KPMG	KPMG
AI algorithms analyze your transactions to send you budget advice, promotions, and notifications	47%	55%	59%	45%	36%	48%	59%	53%	41%	53%	43%	42%	35%	34%	30%	32%	46%	56%	43%	62%	65%
AI algorithms analyze your credit score and finances to determine your eligibility for loans	46%	50%	56%	36%	35%	42%	66%	50%	48%	54%	37%	34%	36%	36%	26%	29%	49%	59%	45%	62%	66%
Your bank automatically manages your finances, investments, spending behavior, and budgeting	38%	34%	45%	29%	28%	35%	54%	42%	43%	50%	29%	31%	32%	27%	26%	31%	34%	50%	30%	52%	49%
Automated systems invest and manage your finances without your explicit approval or control	36%	42%	37%	27%	21%	31%	47%	42%	40%	30%	31%	31%	35%	30%	23%	25%	20%	58%	30%	54%	54%

Consumers are most comfortable with wearable technology…

…telemedicine for virtual consultations, and doctors having automatic access to their health records. Dallas, Seattle, and DC remain more accepting of tech advancements, while some other cities exhibit varying levels of reservations.

Tech & Health Comfortability (T2B) KPMG	Total	KPMG Austin	KPMG Boston	KPMG Chicago	KPMG Dallas/ Ft Worth	KPMG Denver	KPMG LA/ Orange County	KPMG NY Metro	KPMG Raleigh-Durham*	KPMG Seattle	KPMG Washington DC
Wearable technology, such as fitness trackers, monitor your vital signs and provide health insights	62%	62%	60%	61%	72%	64%	55%	54%	51%	67%	70%
Telemedicine allows virtual consultations and remote monitoring from the comfort of your own home	60%	63%	58%	53%	70%	58%	46%	45%	58%	67%	78%
Doctors are automatically equipped with information about your health history/family background	60%	60%	60%	59%	70%	58%	52%	47%	59%	67%	73%
Electronic health records provide a centralized and accessible location for medical history and data	59%	72%	63%	65%	70%	55%	49%	49%	57%	70%	64%
Technology implant or device monitors your health and wellness, providing alerts to doctors	50%	58%	44%	39%	68%	50%	46%	43%	30%	57%	62%
AI-powered diagnosis and treatment give personalized healthcare based on your history and symptoms	47%	57%	34%	42%	61%	51%	43%	37%	33%	60%	65%
Biometric monitoring and DNA testing becomes the basis of your healthcare	44%	53%	34%	39%	53%	46%	43%	33%	30%	62%	57%
Virtual reality and immersive technologies are leveraged in your medical treatment experience	42%	54%	31%	40%	50%	45%	43%	42%	29%	59%	53%
Robots and automation administer your healthcare services	38%	36%	26%	39%	49%	41%	38%	32%	22%	57%	51%

Some cities exhibit less comfort with AI diagnosis and biometric monitoring.

Others have reservations about consolidating their personal information, potentially due to security concerns.

Tech & Health Comfortability (T2B) Non-KPMG	Total	Atlanta	Balti-more	Madison*	Minnea polis/ St Paul	Phila-delphia	Phoenix	Portland	Salt Lake City*	San Diego	SF Bay
Wearable technology, such as fitness trackers, monitor your vital signs and provide health insights	62%	68%	55%	76%	61%	60%	50%	54%	73%	69%	68%
Telemedicine allows virtual consultations and remote monitoring from the comfort of your own home	60%	71%	61%	64%	58%	65%	46%	56%	61%	55%	71%
Doctors are automatically equipped with information about your health history/family background	60%	72%	56%	46%	59%	49%	58%	57%	62%	70%	60%
Electronic health records provide a centralized and accessible location for medical history and data	59%	64%	46%	62%	68%	53%	51%	44%	61%	64%	60%
Technology implant or device monitors your health and wellness, providing alerts to doctors	50%	54%	42%	45%	57%	46%	41%	42%	59%	67%	47%
AI-powered diagnosis and treatment give personalized healthcare based on your history and symptoms	47%	56%	43%	45%	40%	44%	36%	31%	55%	58%	43%
Biometric monitoring and DNA testing becomes the basis of your healthcare	44%	52%	30%	50%	41%	43%	32%	32%	51%	60%	38%
Virtual reality and immersive technologies are leveraged in your medical treatment experience	42%	44%	32%	32%	38%	38%	36%	29%	42%	54%	42%
Robots and automation administer your healthcare services	38%	39%	25%	51%	37%	33%	30%	27%	33%	51%	29%

About half of consumers have engaged with Cybersecurity tools and Generative AI...

…while technologies like NFTs, Metaverse Worlds, and Digital Twins have lower levels of interaction. There are minor variations in tech engagement among cities, with DC notably emerging as a prominent user of most of these technologies.

Technology Interactions	Total	Atlanta	Austin	Balti-more	Boston	Chicago	Dallas/ Ft Worth	Denver	LA/ Orange County	Madison *	Minnea polis/ St Paul	NY Metro	Phila-delphia	Phoenix	Portland	Raleigh-Durham *	Salt Lake City*	San Diego	SF Bay	Seattle	Washington DC
		KPMG			KPMG	KPMG	KPMG	KPMG	KPMG			KPMG			KPMG					KPMG	KPMG
Cybersecurity tools	49%	52%	42%	54%	65%	49%	53%	47%	44%	29%	46%	53%	43%	46%	52%	48%	52%	53%	65%	35%	49%
Generative AI	47%	49%	54%	41%	39%	42%	38%	49%	39%	53%	58%	46%	35%	43%	54%	46%	49%	44%	54%	45%	60%
Crypto Currency	36%	45%	33%	21%	33%	44%	32%	39%	39%	5%	33%	28%	23%	24%	35%	35%	46%	63%	44%	32%	47%
Smart assistants/Robots	35%	34%	45%	41%	31%	36%	33%	24%	32%	31%	29%	33%	30%	34%	48%	35%	37%	36%	38%	25%	42%
Biometric Monitoring	24%	30%	24%	19%	23%	24%	25%	28%	28%	15%	17%	14%	21%	18%	21%	28%	36%	23%	24%	24%	31%
VR/AR Experiences	24%	29%	19%	23%	19%	22%	27%	21%	31%	8%	21%	34%	17%	19%	23%	18%	33%	30%	27%	20%	29%
NFTs	22%	32%	24%	12%	10%	28%	15%	24%	25%	3%	28%	14%	22%	13%	20%	10%	24%	48%	18%	31%	31%
Metaverse Worlds	16%	13%	14%	12%	9%	20%	11%	15%	23%	5%	13%	18%	12%	18%	17%	11%	13%	23%	13%	17%	36%
Digital Twins	7%	9%	10%	8%	7%	8%	6%	18%	6%	3%	5%	6%	6%	2%	7%	2%	2%	9%	3%	11%	16%
Other	6%	12%	4%	8%	11%	14%	6%	4%	1%	12%	8%	6%	5%	8%	6%	6%	7%	2%	2%	4%	0%

Markets Base-Size Reference

	n-size		n-size
Austin	101	Atlanta	110
Boston	105	Baltimore	77*
Chicago	113	Madison	60*
Dallas/Ft Worth	106	Minneapolis/St. Paul	101
Denver	106	Philadelphia	102
LA/Orange County	114	Phoenix	103
NY Metro	114	Portland	106
Raleigh-Durham	97*	Salt Lake City	57*
Seattle	109	San Diego	104
Washington DC	106	SF Bay	105
		Total	**1,996**

*LOW BASE-SIZE

Context for Change Methodology

Average Composition (Weighted)*:

Gender	
Male	50%
Female	50%

Age	
18-24	15%
25-44	55%
45+	30%

Ethnicity	
American Indian / Alaska Native	1%
Asian	5%
Black / African American	15%
Hispanic / Latino	20%
White / Caucasian	60%
Other / Prefer not to say	1%

Income	
Under $25,000 & $25,000 - $35,000	15%
$35,000 - $74,999	25%
$75,000 - $99,999	25%
$100,000 - $149,999	20%
$150,000+	13%