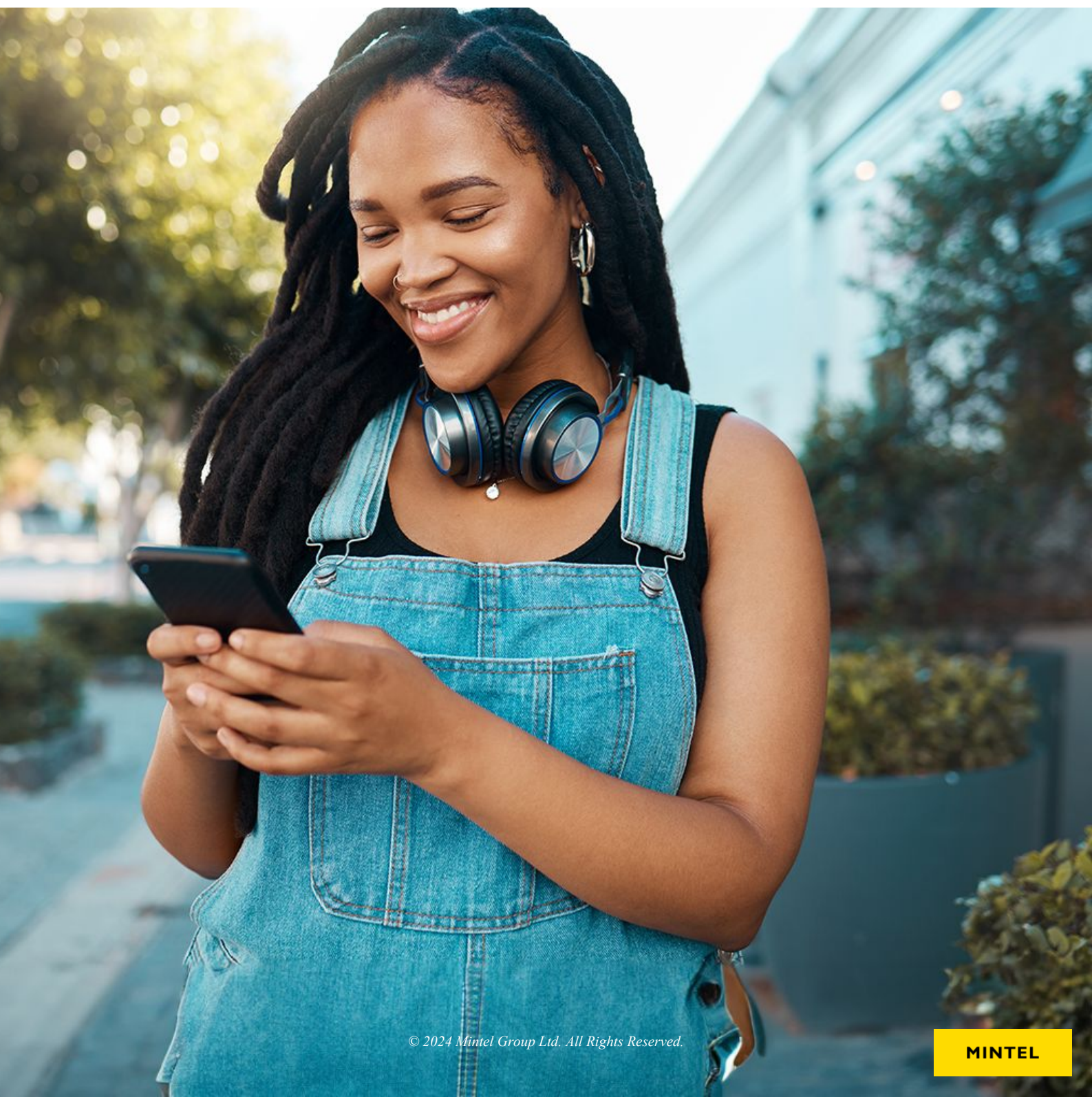


# DIGITAL LIVES OF CONSUMERS – GERMANY – 2024

The growing prominence of AI will change consumers' digital behaviours, especially shopping and searching, spearheaded by AI-enthusiastic younger consumers.



Jan Urbanek, Principal Analyst



# Digital Lives Of Consumers - Germany - 2024

## This report looks at the following areas:

- Devices consumers typically use for online activities, including purchasing products/services and streaming TV shows/films
- Areas consumers would be comfortable following recommendations from AI, including on leading a healthy lifestyle and buying beauty products
- Attitudes towards digital technology, including if advice from AI is as valuable as advice from humans
- Behaviours regarding digital technology, including feeling that the internet has become increasingly dangerous



The growing prominence of AI will change consumers' digital behaviours, especially shopping and searching, spearheaded by AI-enthusiastic younger consumers.

## Overview

54% of 16-24s consider interacting with others in online games to be a **meaningful form of social interaction** (26% for all). While gaming and VR brands can resonate by promoting how they offer enhanced online interactions, this also highlights the potential of interactive online marketing. Brand placements that promote social engagement online, for example in online games, can increase brand appeal by linking it to emotive experiences.

While the consumer electronics market declined in value in 2023 and consumers remain cautious about their tech spending plans, the daily lives of German consumers will continue to increasingly revolve around digital activities, driven by ubiquitous device ownership.

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61% of consumers feel that using the internet has become increasingly dangerous, affecting behaviours in business critical ways. **Brands must make sure consumers feel safe on their websites or apps to not miss out on traffic, engagement or purchases, for example by leveraging AI as safety assistants.**

39% of 16-34s consider advice from AI to be as valuable as advice from humans, underscoring the opportunities for brands to **resonate by offering assistance via AI**. In fact, 41% of 16-34s are open to sharing personal data with AI for personalised advice, opening opportunities for **in-depth on-device assistance**.

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# Report Content



## EXECUTIVE SUMMARY

- The five-year outlook for the digital lives of consumers

### Market context

- Online presence is prevalent across age groups
  - Graph 1: internet usage, by age, 2009-23
- Advances with AI will foster shifts in digital habits

### Mintel predicts

- Prepare for increasingly AI-assisted consumers
- Long term: prepare for growing VR adoption...
- ...but see it as a complement to established devices
- Apple promotes the Vision Pro as the future of screens

### Opportunities

- Address growing concerns regarding safety online
- Embrace the reinforced importance of trust in the gen AI era
- Capitalise on the AI enthusiasm of 16-34s
- Engage younger consumers with interactive ads

## MARKET DRIVERS

### The German economy

- Inflation is still the key factor affecting consumers' finances
- The consumer electronics market takes a hit in Germany
- Digital habits will persist despite market challenges

### Use of digital technologies

- High device ownership facilitates digital lives in Germany
  - Graph 2: devices personally owned\*, 2024
  - Graph 3: devices in the household\*, 2024
- Online media consumption sees a decline after years marked by the pandemic
  - Graph 4: daily online media consumption\* (in mins), by age group, 2019-23
- Online media consumption sees a decline after years marked by the pandemic

### Cyber crime

- Cyber crime cases declined in 2022 – but appearances are deceptive

## Artificial intelligence

- Artificial intelligence is on the rise
  - Graph 5: Google searches for the topic 'Künstliche Intelligenz' (Artificial Intelligence), 2022-23

## WHAT CONSUMERS WANT AND WHY

### Online activities

- The majority of Germans engage with online activities
- Cater to Germans' appreciation of efficiency with digital tech
  - Graph 6: devices typically used for online activities (NET of any device used), by age, 2024
- Tap into the online entertainment demand of younger consumers
  - Graph 7: devices typically used for online activities (NET of any device used), by age, 2024
- Address the growth potential for stock trading among females
  - Graph 8: consumers who typically buy or sell stocks/shares online (NET any devices used), by gender & age, 2024

### Devices used for online activities

- Adapt to the preferred device for each task
  - Graph 9: devices typically used for online activities (NET), 2024
- Don't neglect the desktop in this mobile era
- Cater to the device preferences of your target group
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- Ensure seamless cross-device experiences to resonate with younger consumers
  - Graph 11: devices typically used to watch a TV show/film on a streaming service, by age, 2024
- Use of computers for online activities skews towards men
  - Graph 12: typically using a laptop/desktop computer for selected online activities, by gender, 2024
- Tap into men's desktop computer affinity

### Comfort with following AI recommendations

- Capitalise on the trust in AI recommendations among German consumers
  - Graph 13: "I would be comfortable following the recommendations of Artificial Intelligence (AI) on...", 2024
- AI will elevate consumer expectations
- Align AI tools with established consumer habits
- Capitalise on the AI enthusiasm of younger Germans
- Samsung goes hard on promoting AI
- Harness the potential of gen AI in the medical domain
  - Graph 14: consumers comfortable with following AI recommendations on medical issues, by age, 2024
- Google envisions an AI-powered future for personal health tech
- Use AI to assist younger Germans with a healthy lifestyle

- Prepare for AI-enhanced financial literacy
- Put the human element in AI fashion bots
- Capitalise on a scientific positioning with Dating AI

## Attitudes towards digital technologies

- Address growing distrust fostered by AI
  - Graph 15: attitudes towards technology, 2024
- Building trust will be key in the gen AI era
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  - Graph 16: considering interactions in online games to be meaningful forms of social interactions, by age, 2024
- Empathise with younger consumers' social media concerns

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  - Graph 17: behaviours regarding technology, 2024
- Address growing concerns regarding online safety
- Make safety your USP
- Harness the power of AI for user safety
- Google promotes its AI-empowered safety features with Chrome
- Capitalise on younger consumers' zero-party data
- Address consumers' urge for healthy digital habits
- Engage younger consumers with interactive ads
- Gen AI unlocks creation to anyone – tap it!

## APPENDIX

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

- Abbreviations
- Consumer research methodology
- A note on language

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