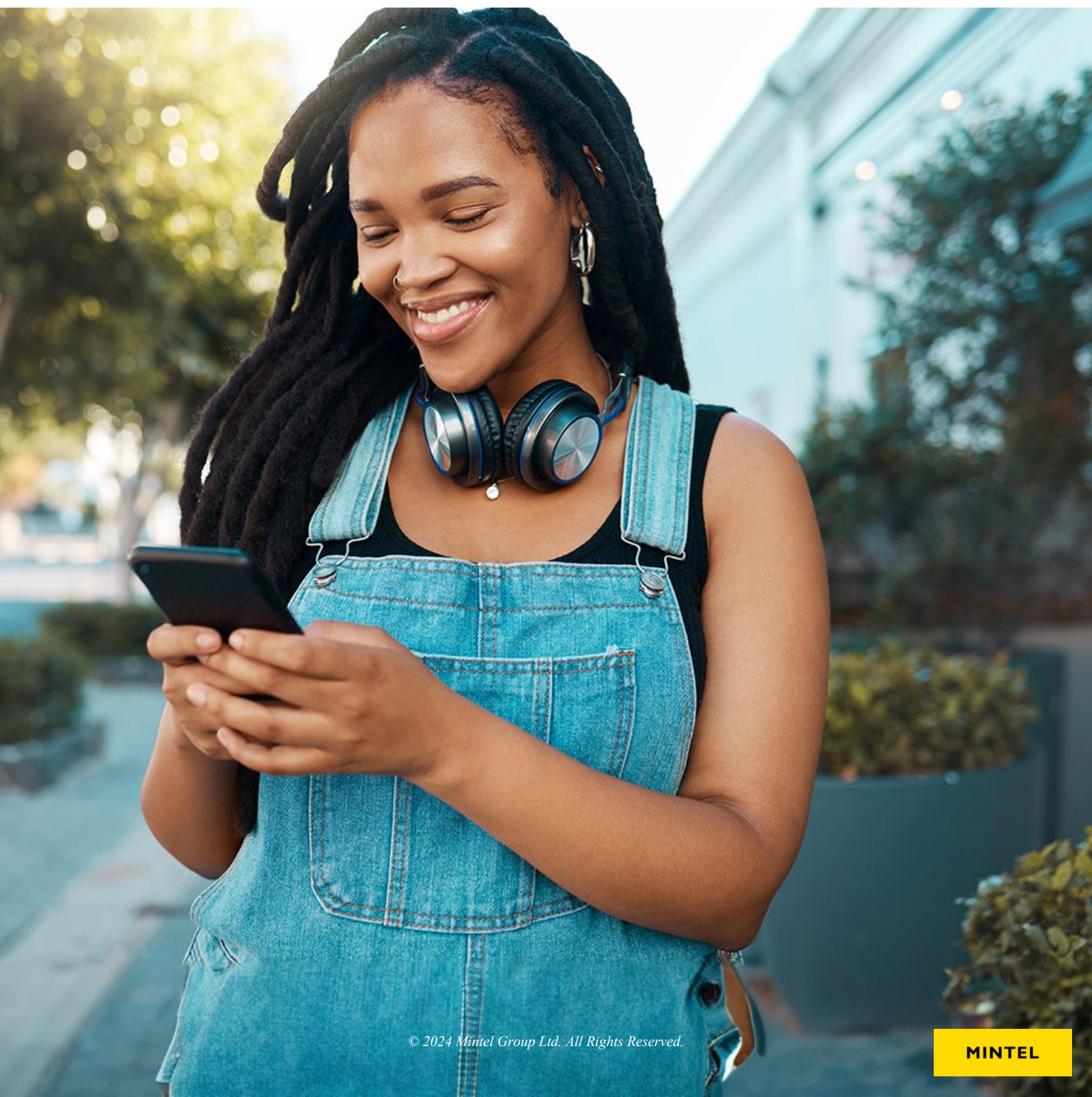


DIGITAL LIVES OF CONSUMERS – GERMANY – 2024

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

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 - Graph 3: devices in the household*, 2024
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 - 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

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WHAT CONSUMERS WANT AND WHY

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 - Graph 7: devices typically used for online activities (NET of any device used), by age, 2024
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- 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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