

DIGITAL LIVES OF CONSUMERS – UK – 2024

AI's emergence can help deliver new services for consumers. However, brands need to focus on delivering accuracy and safeguarding from its downsides.



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Digital Lives Of Consumers - UK - 2024

This report looks at the following areas:

- Household ownership of technology products and use of apps, digital subscriptions and use of social media
- Devices used to search and purchase a range of goods and services
- The impact of the cost of living on the digital lives of consumers
- Innovations of companies in the technology and digital space
- Consumer attitudes towards innovation in AI, their concerns about online life and online behaviours



AI's emergence can help deliver new services for consumers. However, brands need to focus on delivering accuracy and safeguarding from its downsides.

Overview

The cost of living crisis continues to be a problem for consumers, leading some to delay making technology purchases, or to spend less on technology overall. For hardware, consumers are likely to prioritise essentials or replacements, rather than emerging devices such as smart home products or wearable technology. Digital subscriptions, are likely to see dampened growth, with some looking to cut back services.

Identity theft and misuse is at the heart of consumer concern around activities online, and concern is **higher for** women than men. AI has the potential to turbo charge identity theft and misuse, so brands must find ways to help consumers, and especially women, feel comfortable by adding enhanced security options such as two-factor authentication as well as robust moderation policies and tools to identify and remove harmful content, such as deepfakes.

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AI is still relatively new, with a long way to go to iron out issues it faces with accuracy. However, there are ways it can help consumers with everyday tasks, such as planning and scheduling, productivity and as a personal entertainment curator. There is potential for it in areas such as powering super apps for finances, healthcare, and even, in the long term, offering companionship.

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Report Content



EXECUTIVE SUMMARY

Opportunities for the digital lives of consumers

- Personalise the search and purchase journey
- AI offers brands potential shortcuts and convenience, but don't discount the human premium
- AI will drive opportunities for support of health and wellness management

Market dynamics and outlook

- The cost of living is still a problem for consumers
 - Graph 1: attitudes towards the cost of living, 2024
- Government combats online hate and promotes technology in fight against obesity
- Some consumers struggle to balance the role of technology in their lives
 - Graph 2: consumer attitudes* towards technology, 2024

What consumers want and why

- Laptops and desktop computers are used for purchasing high value items and services
 - Graph 3: use of devices to purchase goods and services, 2024
- Holistic wellbeing can be served through AI innovations
 - Graph 4: interest in AI innovations, 2024
- Reassure consumers about their digital footprints
 - Graph 5: attitudes to online safety, 2024
- Older consumers are concerned about their identity being misused online
- AI needs to prove its utility to overcome consumer scepticism
 - Graph 6: attitudes towards digital lives, 2024

Innovation and marketing

- AI hardware looks to screenless future and to replace apps
- AI is being engineered into everyday applications

MARKET DYNAMICS

Market background

- Consumers value versatility in laptops and tablets
 - Graph 7: personal ownership of technology products, 2024
- Messaging and socialising are cornerstones of consumers' digital lives
 - Graph 8: type of app used on smartphone, 2023
- Smartphones are the key device for entertainment

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- Graph 9: preferred device, by activity, 2024
- Household ownership of technology devices
 - Graph 10: household ownership of technology devices, 2023
- Digital subscriptions suffer from price increases and password restrictions
 - Graph 11: use of paid-for digital subscription services, 2023
- Mobile gaming continues to be a key platform for consumer engagement
- Social media provides inspiration and entertainment
 - Graph 12: use of social media platforms, 2024

Macroeconomic factors

- Consumer confidence is recovering from the lows of mid-2022
 - Graph 13: index of financial sentiment in the next year, 2016-24
- However the reality for the majority is that the cost of living is still a problem
 - Graph 14: attitudes towards the cost of living, 2024
- Consumers spend less on technology due to the cost of living crisis
 - Graph 15: consumer expenditure on technology and communications compared to 12 months previously, 2024

Social, environmental and legal factors

- Flexible technology and security to meet hybrid working routines will persist
 - Graph 16: working location, 2024
- Some consumers struggle to balance the role of technology in their lives
 - Graph 17: consumer attitudes towards technology, 2024
- Think beyond the youngest consumers to find the leaders in tech
- Reassure parents about the impact of technology on the development of their children
 - Graph 18: parents attitudes towards technology, 2024
- Online safety bill becomes law
- Technology and digital tools will have a role to play in the government's fight against obesity
 - Graph 19: obesity rates in England, 2021
- Accessible technology can play a role in helping those with disabilities
 - Graph 20: consumers' health issues, 2024
- Google starts to phase out third party cookies

WHAT CONSUMERS WANT AND WHY

Search behaviour across devices

- Consumers use laptops or desktops to search for more complex tasks
 - Graph 21: search behaviours across devices, 2024
- Younger consumers are more reliant on smartphones for searching
- Optimise travel apps and mobile platforms to engage younger consumers

- Graph 22: use of device by age to search for holidays or travel, 2024
- Promote functionality of foldables in search
- Younger audiences are mobile-centric

Purchasing behaviour across devices

- Convenience of mobile underpins searching behaviours
- Consumers prefer using laptops and desktop computers for purchasing high value items and services
 - Graph 23: use of devices to purchase goods and services, 2024
- Meet younger consumers mobile first preferences head on, with intuitive sites to support quick decision-making
 - Graph 24: use of devices to purchase food and drink, by generation, 2024
 - Graph 25: use of devices to book leisure activities, by generation 2024
- Older generations prefer the security of larger devices for making bookings across a range of purchases
- Optimise for mobile in the purchase journey
 - Graph 26: use of device to purchase goods and services, UK

Interest in AI innovations

- Modest signs of engagement across AI innovations
 - Graph 27: interest in AI innovations, 2024
- AI can play a role in helping consumers manage daily routines
 - Graph 28: interest in AI innovations, 2024
- A holistic wellness AI could support total wellbeing
- AI can be a curator of home entertainment and drive accessibility options
- AI innovations appeal to those in higher income households
- AI can power the next generation of personal finance super-apps

Consumer concerns with their digital lives

- Give consumers control over their digital footprints
 - Graph 29: attitudes to online safety, 2024
- Create simple tools and interfaces to ease concerns over identity misuse among older generations
 - Graph 30: concerns over identity misuse, by generation, 2024
- Key factors driving consumer behaviour around rights
- Put consumers in control of their digital assets and footprint
- Concerns over AI's ability to misinform are high
- Watermarking and enhanced fact checking can counter misinformation
- Education is key to keeping children safe online
 - Graph 31: parents concern over children's online activities, 2024
- Opportunities for a brand to win as the custodian of young lives online

Attitudes towards online life

- Create a space for older consumers to feel involved in the AI revolution

- Jury is out on AI's impact on life
 - Graph 32: attitudes towards artificial intelligence, 2024
- Those who are positive about AI's impact are more positive about a range of AI innovations
- Even the tech savvy need protection from scams
- Healthy behaviours regarding personal data security evident
 - Graph 33: behaviours and attitudes towards online safety, 2024
- Treat digital interactions the same as real world ones
 - Graph 34: attitudes towards online harassment, 2024
- In a cookieless world look to mobile apps
 - Graph 35: attitudes towards mobile apps, 2024

Launch activity and innovation

- BBC launches content credentials feature on website to verify content
- AI assistants look to promote a post-apps world
- Rabbit introduces AI interface to control apps
- Apple and Meta launch competing headsets
- Brands launch new editions of smart glasses
- Digital humans will provide customer service points, as well as education and virtual influencing
- There's an AI for that...
- Whoop coach aims to harness AI to be a personal trainer

APPENDIX

- Abbreviations

Methodology

- Consumer research methodology

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