

TECHNOLOGY TRENDS WINTER – UK – 2023

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Thomas Slide, Category Director - Media and Technology



Technology Trends Winter - UK - 2023

This report looks at the following areas:

- Consumers' perception of different types of advertising, including TV adverts, social media adverts, sponsored search and pop-up adverts
- Trends in ownership of specific technology products
- Smartphone operating system, app usage and 5G connectivity
- Recent and planned purchases of technology devices



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Overview

As financial pressure has eased and confidence has returned, interest in purchasing electrical items improved. Recent purchasing and buying intentions reached the highest level since mid-2021. The lull in purchasing in 2022-23 also reflected a hangover following the surge in electrical goods buying that took place during, and in the period following, the COVID-19 pandemic.

Smartphone ownership has been near 90% among younger generations for a number of years, while adoption among older generations has been growing. Now, there is little difference between generations, with 84% of the over 65s owning a smartphone, compared to 88% of all 16-64s.

When it comes to perception of advertising, millennials are most likely to hold a positive opinion of TV adverts. 33% of older millennials find them 'entertaining' and millennials are the only generation that is more likely to perceive them as entertaining, than annoying. Since this generation also [watches more TV on demand than any other](#), with 61% watching at least daily,

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it bodes well for the introduction of TV advertising to many of the streaming platforms such as Netflix, Amazon Prime and Disney+.

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Report Content



MARKET DYNAMICS

- Financial confidence starts to recover as inflation eases
 - Graph 1: financial confidence, 2018-24
- Leading to renewed interest in purchasing electricals
 - Graph 2: bought new electrical equipment (eg TV, laptop) in the last three months vs plan to do so in the next three months, 2018-24
- Deflation has continued in most tech categories
 - Graph 3: consumer prices change, technology related products, 2018-23
- Spending on computers rises after the pandemic
 - Graph 4: consumer spending on technology, 2018-23
- Christmas 2023 boost fails to get going for specialist retailers
 - Graph 5: retail sales of audio, video and music specialist stores, 2021-23

WHAT CONSUMERS WANT AND WHY

Special focus – perception of online advertising

- Banner ads are particularly annoying to consumers
 - Graph 6: consumer perception of different advertising types, 2023
- TV advertising can engage through entertainment
- Millennials have the most positive view of TV advertising
 - Graph 7: perception of TV advertising, by generation, 2023
- Use sponsored search results to reach consumers on their own terms
 - Graph 8: perception of sponsored search results, 2023
- Young people feel misled by social media adverts
 - Graph 9: perception of advert types as 'misleading', by generation, 2023

Trended data – smartphones

- Over 65s have almost caught up when it comes to smartphones
 - Graph 10: smartphone ownership (rolling average*), by age, 2018-23
- Over 65s have almost caught up when it comes to smartphones
- Young men are most likely to have a 5G phone without a 5G contract
 - Graph 11: 5G smartphone connectivity, 2021-23
- Android grows share driven by uptick in younger users
 - Graph 12: smartphone operating system, 2021-23
- Despite growth in older users, Apple dominates among Generation Z

- Takeaway food delivery apps see a decline in use
 - Graph 13: types of smartphone app used, 2022-23
- QR code scanning hits new highs
 - Graph 14: smartphone activities in the last three months, 2022-23
- Smartphone purchase plans edge up in the run up to Christmas
 - Graph 15: smartphone purchases and planned purchases, 2019-23

Trended data – wearables

- Smartwatch ownership increases sharply among Millennials
 - Graph 16: device ownership, 2019-23
- Wireless over-ear headphones perform well
 - Graph 17: purchases of wearables in the last three months, 2019-23
- Planned purchases of audio products increase as Christmas nears
 - Graph 18: planned purchases of wearables in next three months, 2019-23

Trended data – computers

- Tablet ownership declines again
 - Graph 19: computer ownership, 2018-23
- Little long term change in laptop ownership by form factor
 - Graph 20: computer form factor, 2017-23
- Computer market returns to more traditional buying patterns
 - Graph 21: purchases of computers in the last three months, 2019-23
- Demand is weak in the computers market
 - Graph 22: planned purchases of computers in next three months, 2019-23

Trended data – TV and media devices

- Cost of living crisis holds back take up of Ultra HD TVs
 - Graph 23: type of TV owned, 2016-23
- Planned purchases of UHD TVs ticks up
 - Graph 24: recent and planned purchases of Ultra HD TVs, 2019-23
- Smart speaker ownership falls again
 - Graph 25: devices in the household, 2017-23
- Little change to smart assistant usage
 - Graph 26: smart assistant usage, 2021-23
- Use of connected devices falls slightly in 2023
 - Graph 27: digital activities done in last three months, 2020-23

Trended data – gaming

- Gaming device ownership has fallen from previous highs
 - Graph 28: ownership of gaming hardware, 2018-23

- Purchases of consoles following a similar pattern to previous years
 - Graph 29: purchases of gaming devices, 2019-23
- Planned purchases of gaming devices remains low
 - Graph 30: planned purchases of gaming devices, 2019-23

APPENDIX

- Abbreviations
- Supporting information

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