



## Digital Consumer Trends 2023

August 2023

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## About the research

The UK data 'cut' is part of Deloitte's Global Digital Consumer Trends survey, a multi-country survey of digital service users worldwide. The 2023 global study comprises 27,150 respondents across 17 countries and three continents.

Data cited in this report is based on a nationally representative sample of consumers aged 16-75 in the UK (4,150) weighted for demographics such as age, gender, region and working status. The survey took place during June 2023. Prior versions of this consumer survey have been fielded since 2010.

**Disclaimer: Questions cited in this document may be simplified for the sake of visualisation.**

# Four key takeaways this year

Life moves fast, but tech moves faster. In the 2023 edition of Digital Consumer Trends, consumers are keeping their smart devices for longer, are indifferent to ultra-fast mobile and broadband internet speeds that lack an application, and are tactically sharing subscriptions such as video streaming with family, friends and sometimes strangers. A pragmatic consumer approach to digital life is emerging, as high inflation and interest rates cause economic ripples. Finally, amid the already-volatile digital landscape, consumers have noticed the seemingly transformative power of Generative AI – a cause for both excitement and concern.

## Takeaway 1

**Generative AI has attracted significant public attention, with more than half of UK citizens having heard of a tool.**

Indeed, more than 4 million people have used it for work purposes. Its impact has been mixed: some consumers now use it weekly, but many others have lost interest after the initial 'wow' moment. Regardless, companies are scrambling to develop governance, and regulators to create legal structures, to ensure it is used safely. A key question for many is whether their job might be at risk.

## Takeaway 2

**Subscription video access has declined slightly since 2021, so streaming platforms will explore new avenues for growth.**

Account sharing is rife. An average of 30% of users across 3 major platforms share access outside their household. If split apart, they may pay full price, take an ad-funded service, or leave a video service altogether. For streaming platforms, calculating the potential net gain or loss in paid accounts is crucial, but they must not forget to account for viewership, as irrelevance could be the greatest risk of all.

## Takeaway 3

**Social media is a potent influence on society. For many, it is a source of news, education and debate. But its content is not always true.**

Fabrication of content and misinformation online are growing causes for concern. Alarmingly, in 12 months, just one in ten (12%) had not seen deliberate misinformation; and 39% claimed the issue is getting worse. Furthermore, people may have seen misinformation but failed to identify it. Going forward, who should police this (government, internet platforms, or people) is not universally agreed.

## Takeaway 4

**Cost of living challenges are driving most consumers to be pragmatic, but are also widening the digital divide.**

Lower-income households are disproportionately impacted by cost of living challenges. Compared with last year, lower-income households are less likely to have computers, and less likely to have video and music subscriptions. In contrast, higher-income households have increased their adoption. It is crucial to ensure that certain groups are not at risk of digital exclusion, be it from government services, banking, or jobs.



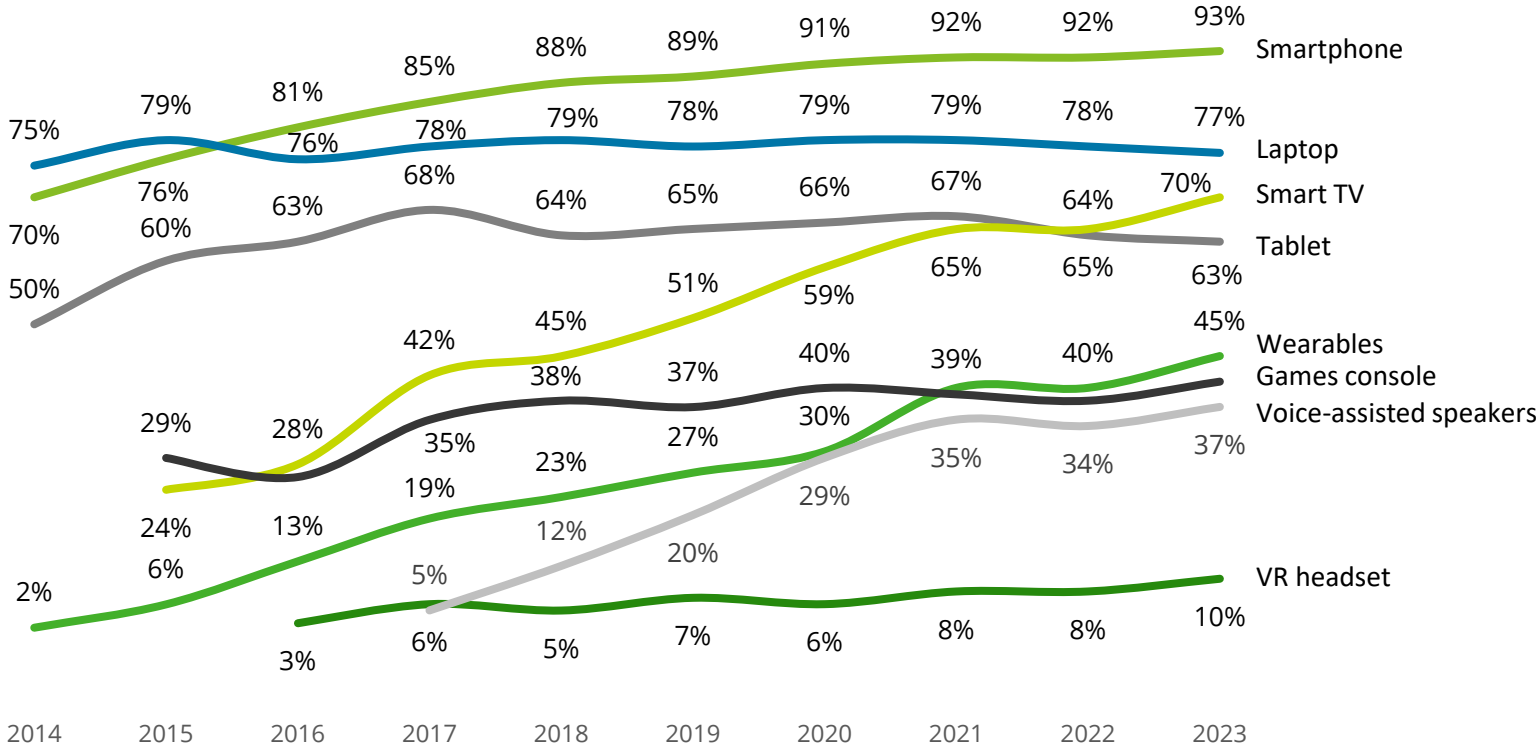
Devices

# Consumer adoption resumes growth for some device types

In 2023, growth in adoption resumed for devices like Smart TV and wearables. In 2022 adoption levels for most categories had been static following two prior years of super-growth. In general UK citizens are keeping devices longer and replacing them less frequently.

## Access to digital devices

Which of the following devices do you own or have ready access to?



Weighted base: All respondents aged 18-75 years, 2014 (4,000), 2015 (4,000), 2016 (4,003), 2017 (4,002), 2018 (4,000), aged 16-75 years, 2019 (4,150), 2020 (4,150), 2021 (4,160), 2022 (4,161), 2023 (4,150)  
 Source: Deloitte Digital Consumer Trends, UK, 2014-2023

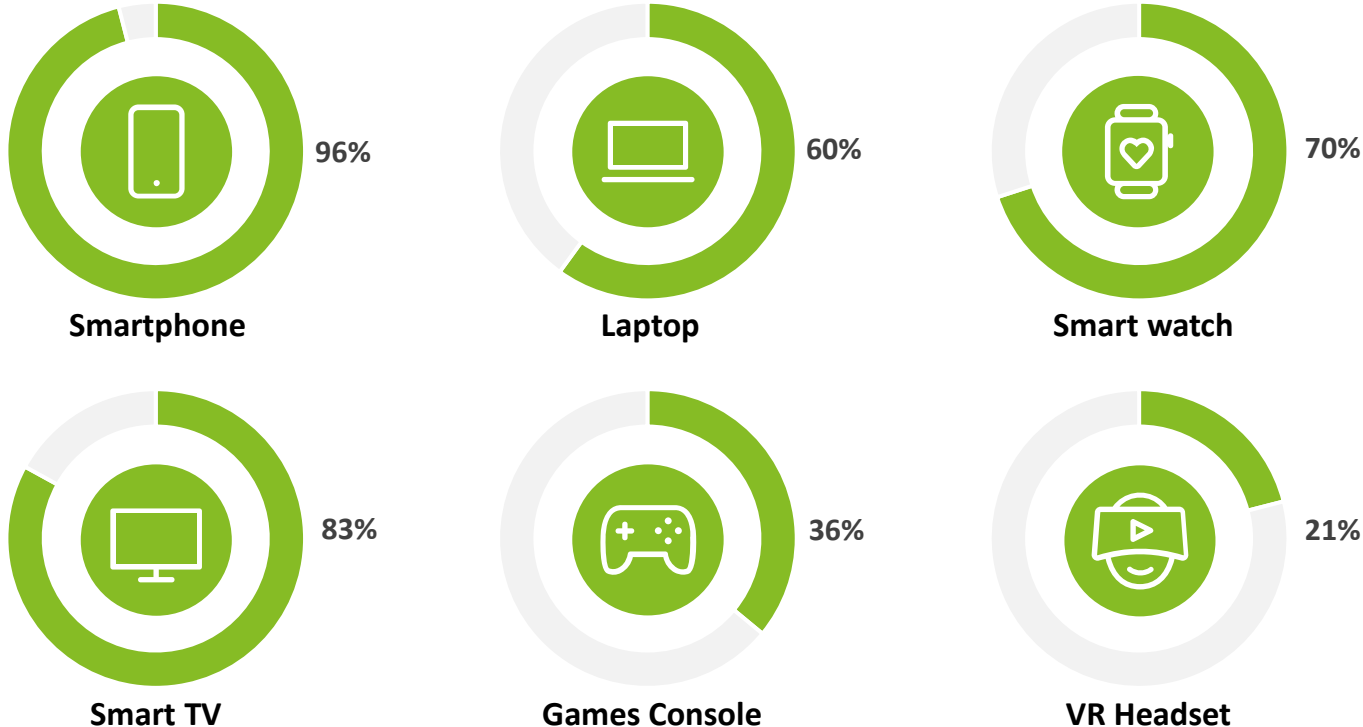


# Usage rates of digital devices varies massively

Claimed usage of devices in the last day varies from 96% for smartphones to 21% for VR headsets. Smartphones are multi-functional and portable, and are often used for several hours per day. Other devices, such as games consoles and VR headsets, are used predominantly for a single function and in a single location. Usage may guide to the likelihood to upgrade.

## Daily usage of digital devices

When was the last time you used this device? [In the last day]



Weighted base: All respondents aged 16-75 years, 2023, with a smartphone (3,868), laptop (3,187), smart watch (1,168), smart TV (2,899), games console (1,684), VR headset (423)  
Source: Deloitte Digital Consumer Trends, UK, 2023

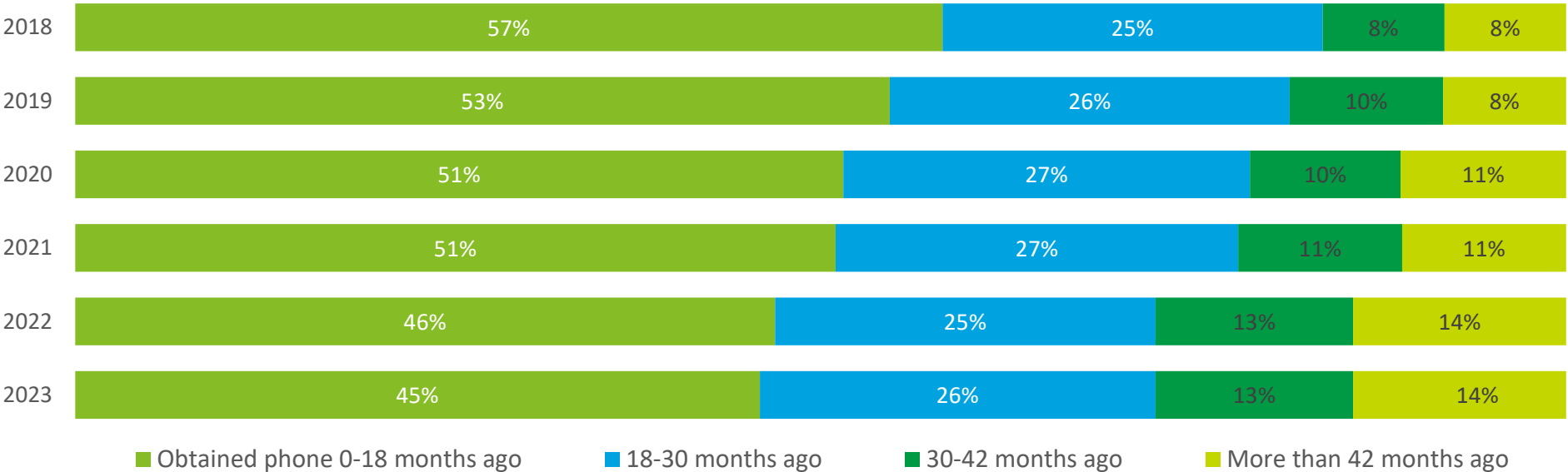


# The smartphone base continues to age as improvements in capability become less perceptible

Consumers are upgrading their smartphone less frequently. In 2023, three in ten (29%) smartphones are at least 30 months old, double the percentage back in 2018. Smartphones are increasingly resilient from both hardware and software perspectives. Smartphone vendors are providing operating system (OS) and security updates for a longer period of time, extending the useful lifetime of devices. Smartphone lifetime can also lengthen as the most common used applications, browsing, social networks and games, are changing minimally year on year, reducing the need to upgrade so as to get access to more powerful processors.

## Age of smartphone installed base

When did you obtain your current phone?



Weighted base: All respondents aged 16-75 years, who have a phone or smartphone, 2018 (3,939); 2019 (3,952); (half sample - sample A) 2020 (1,985); 2021 (1,992); 2022 (2,000); 2023 (2,024)  
Source: Deloitte Digital Consumer Trends, UK, 2018-2023  
Note: Respondents who "Don't Know" not shown

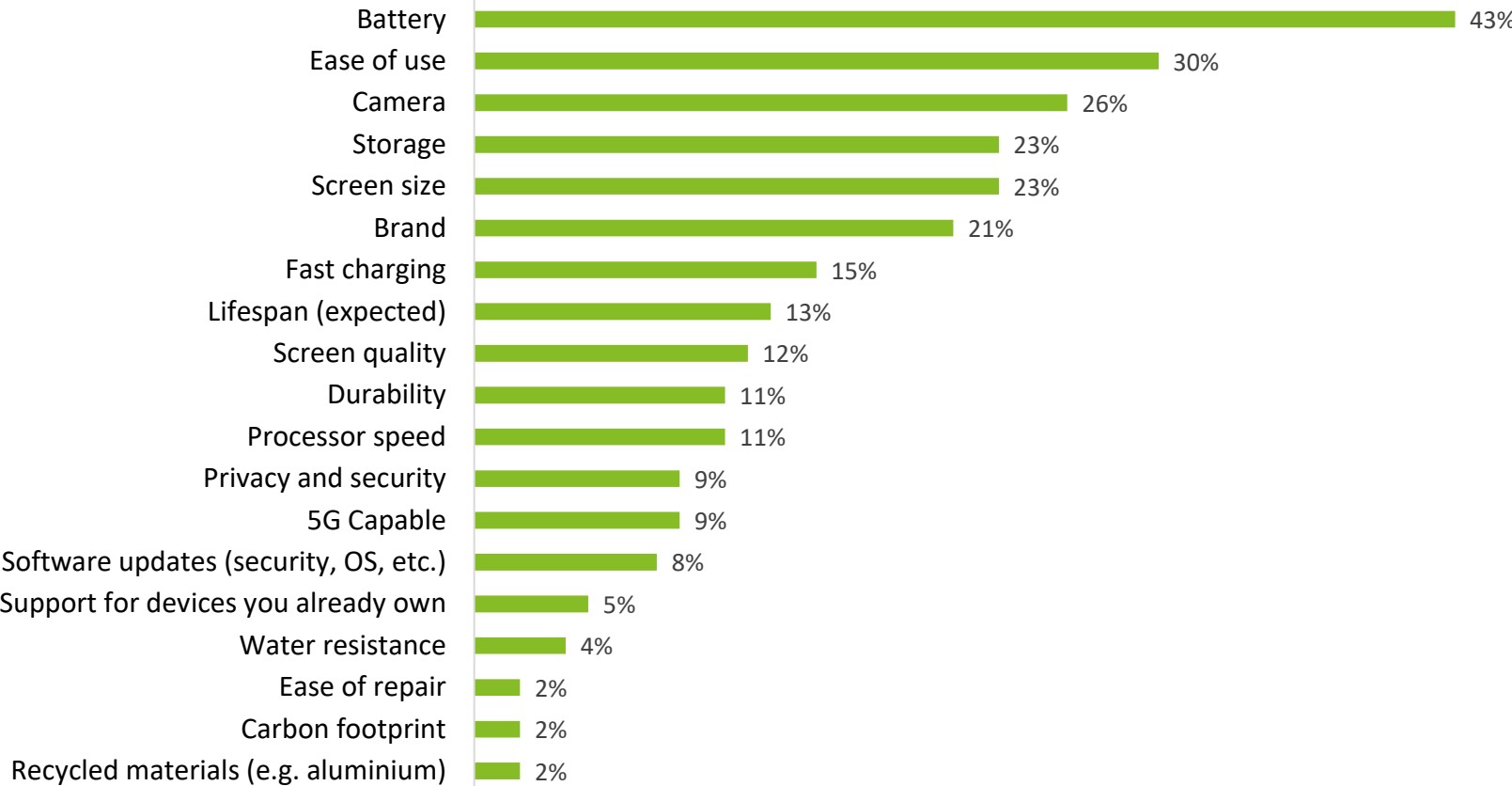
Consumers (continue to) demand great battery life and a camera from their future smartphone. Sustainability credentials such as carbon footprint, use of recycled materials, are the *least* important.

Consumers still demand the best screen, camera and battery, ahead of most other specifications.

When ranked, eco-friendly specifications, such as carbon footprint and use of recycled materials, always tend to benchmark low. As consumers buy a smartphone infrequently (they tend to keep one for longer than three years), and use it hundreds of times per day, it is a crucial decision to get right.

**Feature preferences for next smartphone**

Aside from price, which are most important when deciding your next smartphone?



Weighted base: All respondents aged 16-75 years, who have a phone 2023 (4,000)  
Source: Deloitte Digital Consumer Trends, UK, 2023

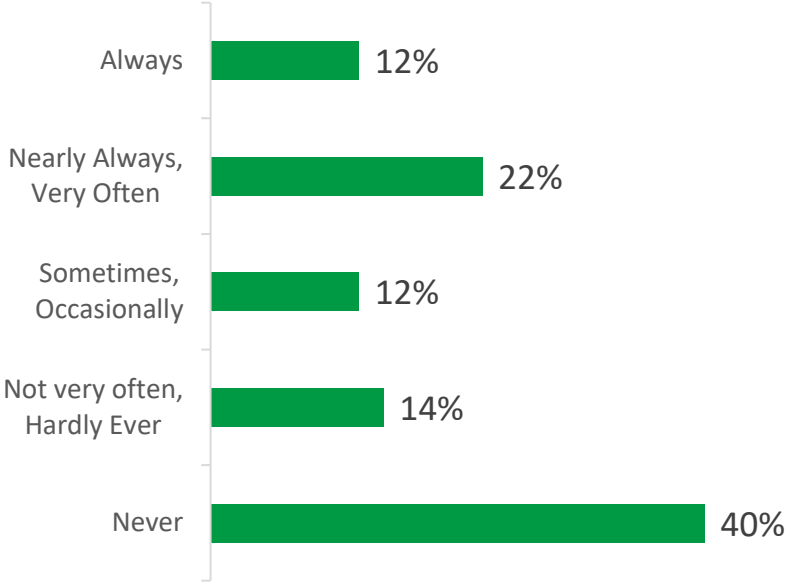


# Further utility yet to be yielded from smartphones

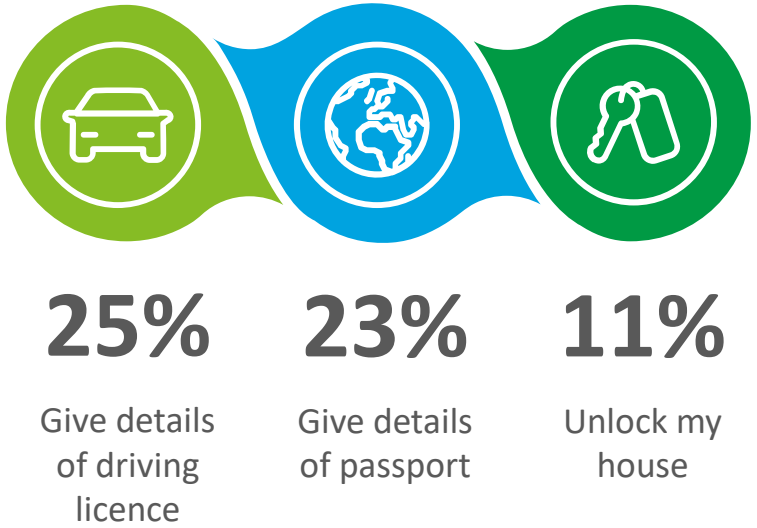
There is still ample scope for additional utility from smartphones. One in four, for example, would like a digital driving licence on their smartphone. Younger groups (between 16-24) who are comfortable with technology are most open to this; two in five (39%) of them would like to use their smartphone as a driving licence, and 29% as a passport. These numbers contrast with 25% and 23% respectively across all age groups.

### Additional utility from smartphones

When available, how often do you use a smartphone or smartwatch to pay for things in person\*?



Which would you like to be able to use a smartphone for?



Weighted base: All respondents aged 16-75 years, 2023, who have a smartphone or smartwatch, who have smartphone (3,868)

Source: Deloitte Digital Consumer Trends, UK, 2023

\*For example, in a shop or restaurant

# Circular economy and digital devices: it's complex

While consumers have good intentions when it comes to devices, environmental concern rarely determines their purchase choice. For some devices, it is hard to find information on environmental differentiators such as carbon footprint.

## Attitudes to sustainability of digital devices

Do you agree or disagree with the following statements?

One the one hand...

**69%**      **66%**

do not tend to throw out broken laptops, phones or tablets with household waste

try to repair devices if they break, before replacing

However, just...

**19%**      **17%**

have regular conversations with family and friends about carbon footprint

claim to know the scale of their carbon footprint

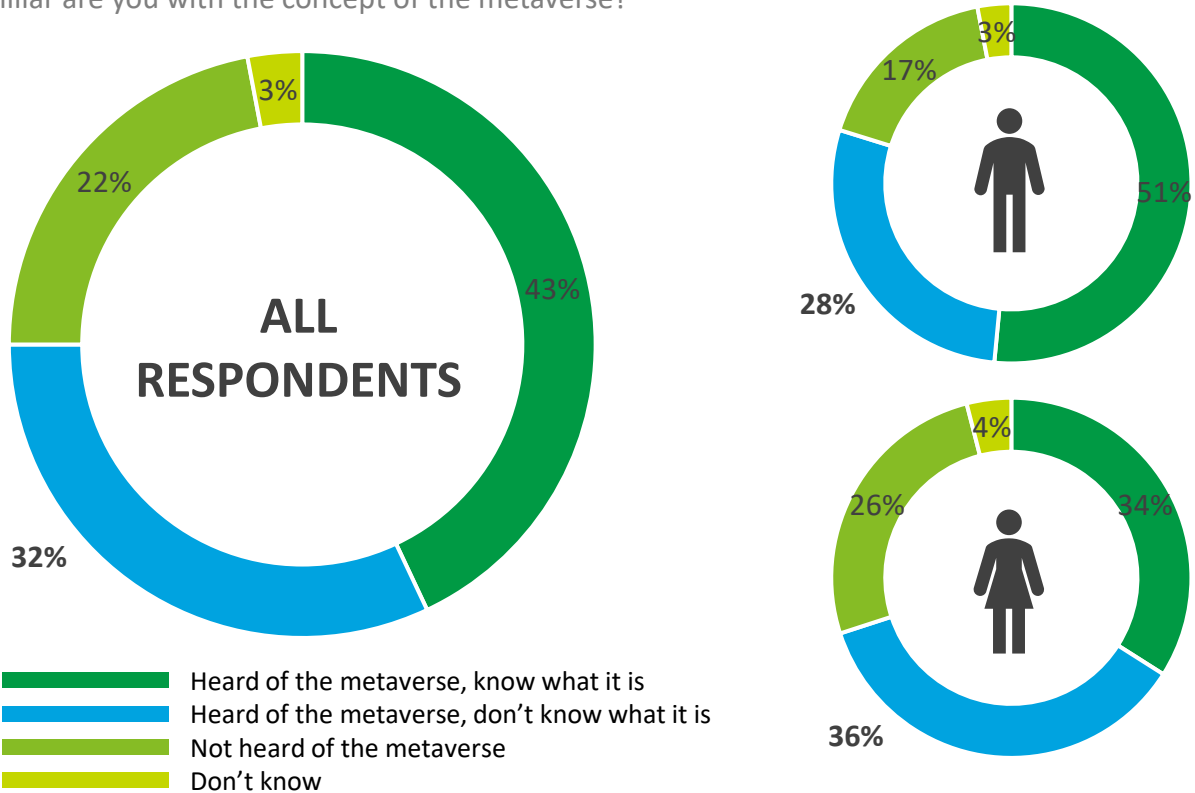


Weighted base: All respondents aged 16-75 years, 2023 (4,150)  
Source: Deloitte Digital Consumer Trends, UK, 2023

# Familiarity with the metaverse increases

Knowledge of the metaverse has increased since 2022, with the proportion claiming to know what it is rising to 43% in 2023 from 34% in 2022. Gender and age differences remain.

**Respondents' familiarity with the metaverse**  
How familiar are you with the concept of the metaverse?



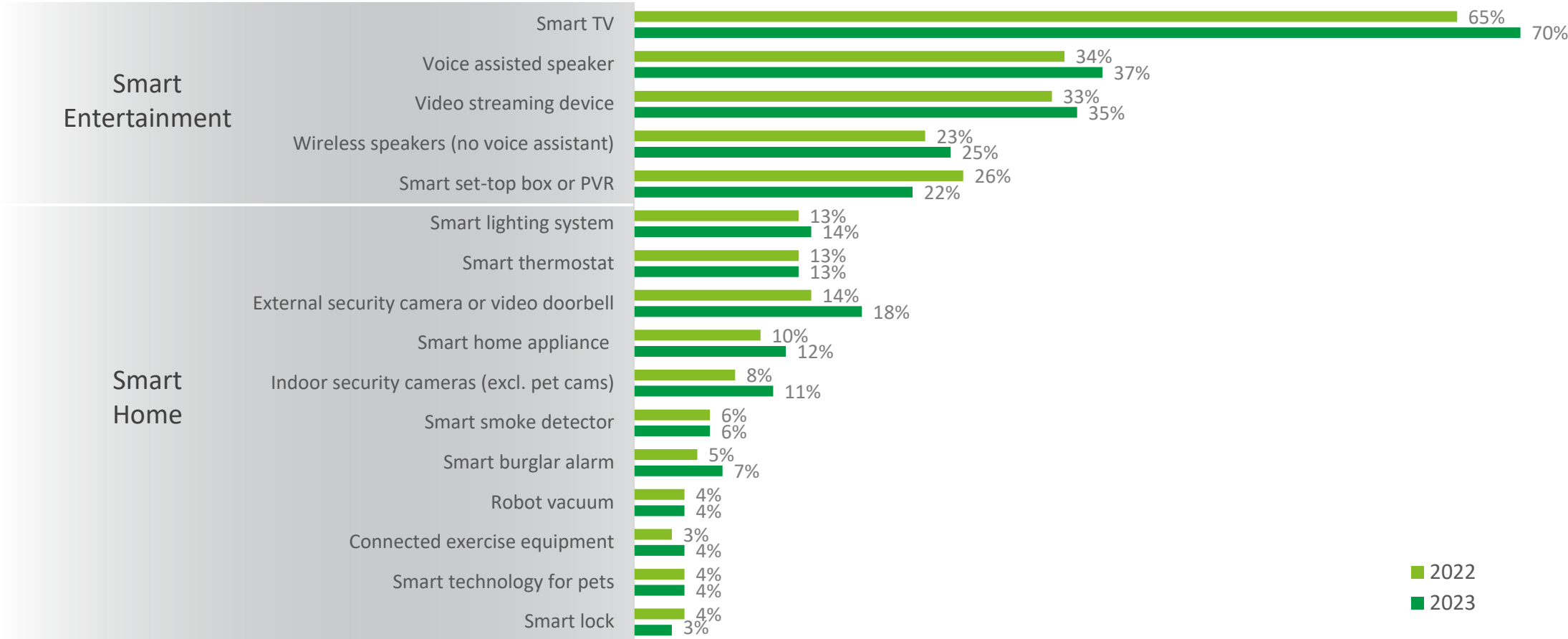
Weighted base: All respondents aged 16-75 years, (half sample - Sample B), 2022 (2,078), 2023 (2,057), men (1,007), women (1,024)  
Source: Deloitte Digital Consumer Trends, UK, 2022-2023



# Smart Home remains a device category for tech enthusiasts; Smart Entertainment continues to grow

## Access to Smart Entertainment and Smart Home devices

Which, if any, of the following devices do you own or have ready access to?



Weighted base: All respondents aged 16-75 years, 2022 (4,161), 2023 (4,150)  
 Source: Deloitte Digital Consumer Trends, UK, 2023



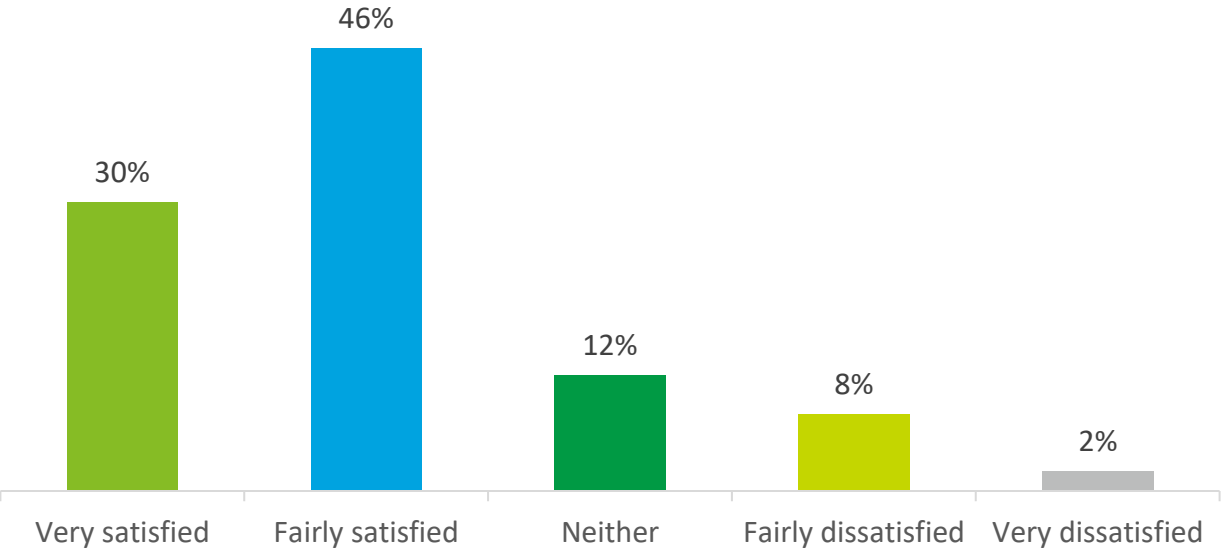
Connectivity

# Broadband satisfaction remains high, possibly creating inertia to change ISP or upgrade to FTTH

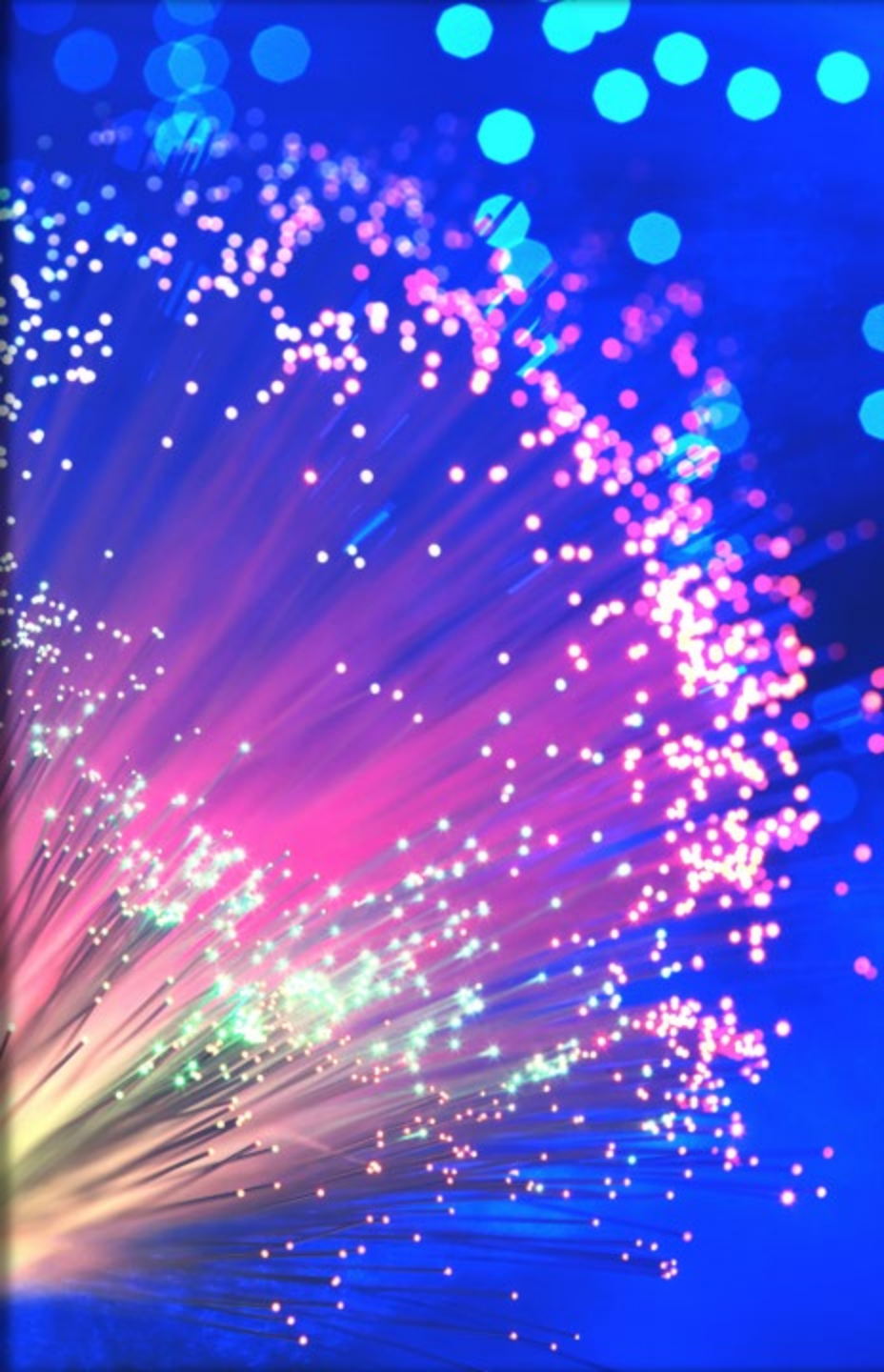
Across the UK, over three-quarters are "very" or "fairly" satisfied with their home broadband. At the time of the survey in 2023, the majority of homes in the UK were connected via a fibre-to-the-cabinet (FTTC) connection. People may be reluctant to upgrade to fibre to the home (FTTH), if FTTC already works well enough and if their typical usage does not require the gigabit speeds enabled by FTTH.

## Satisfaction with internet connection

How satisfied or dissatisfied are you with your internet connection overall?



Weighted base: All respondents aged 16-75 years, with an internet connection, 2023 (4,111)  
Source: Deloitte Digital Consumer Trends, UK, 2023

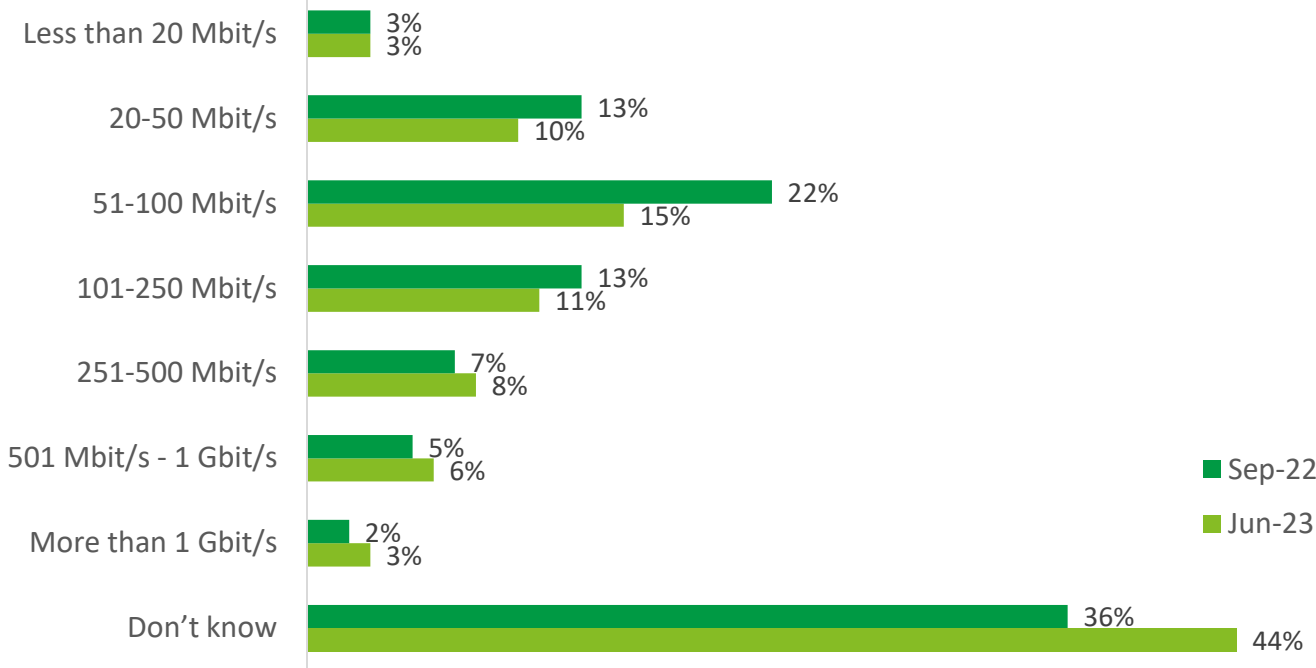


# Broadband downlink/uplink speeds may be becoming less relevant

The most popular reported broadband speed in the country is “Don’t know”. This may be partly because for many consumers speed has been resolved, and is not an issue they consider regularly. Consumers are more aware of price and reliability of broadband.

## Broadband speeds

How fast is the home internet connection you currently have?



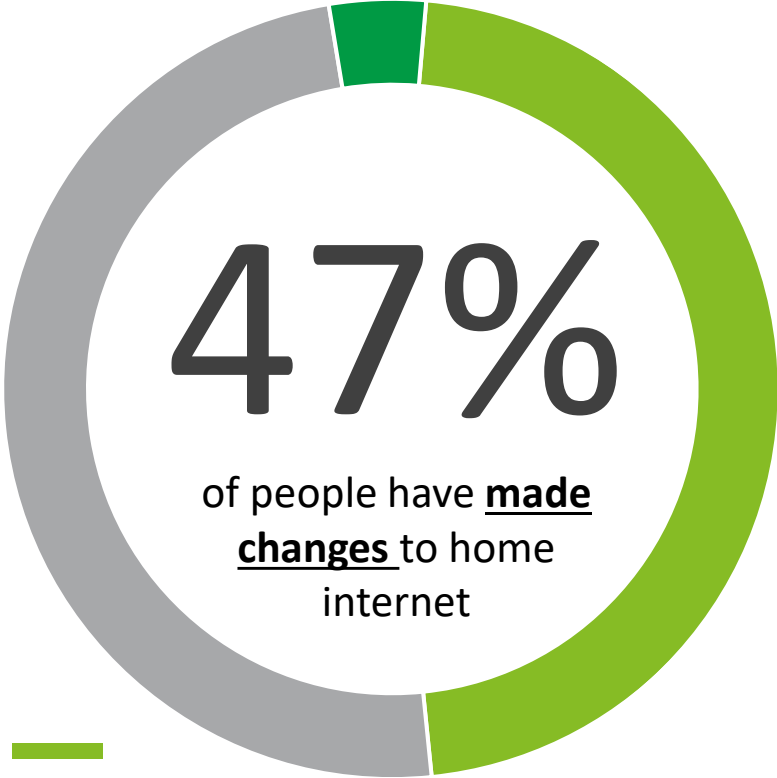
Weighted base: All respondents aged 16-75 years, with a fixed home broadband connection, 2022 (1,978), who have internet access at home, 2023 (4,111)  
Source: Deloitte Project Fibre, 2022, Digital Consumer Trends, UK, 2023



Almost half of all respondents changed their home broadband package in the last year. The most common reason (17%) was a 'better package'; 14% moved to a lower cost package; 7% cut services.

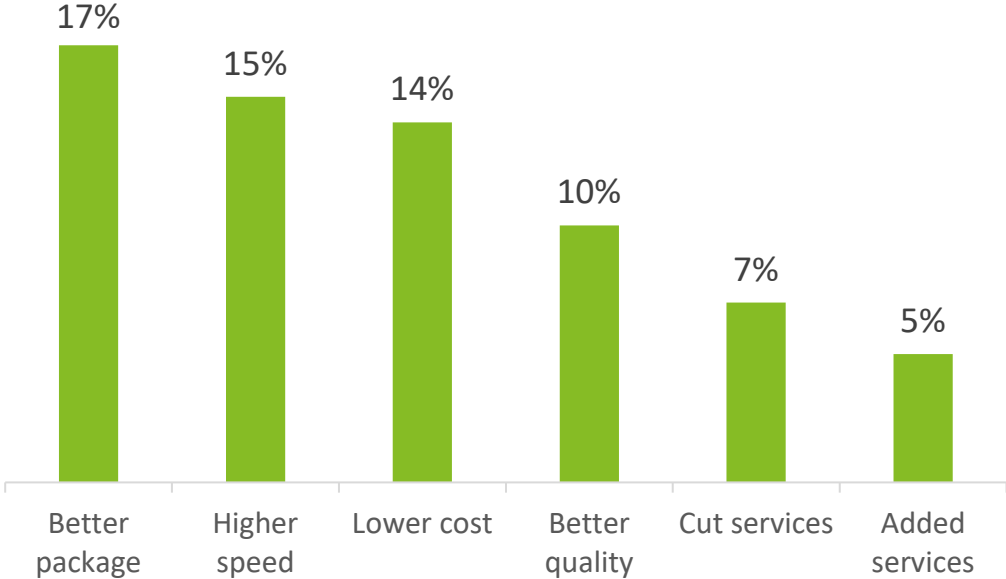
**Changes to home broadband**

Which, if any, changes have you made to your home internet in the past 12 months?



- Changes (47%)
- No changes (49%)
- Don't know(4%)

**ALL RESPONDENTS WHO HAVE INTERNET ACCESS**



Weighted base: All respondents aged 16-75 years, who have internet access at home, 2023 (4,111)  
Source: Deloitte Digital Consumer Trends, UK, 2023

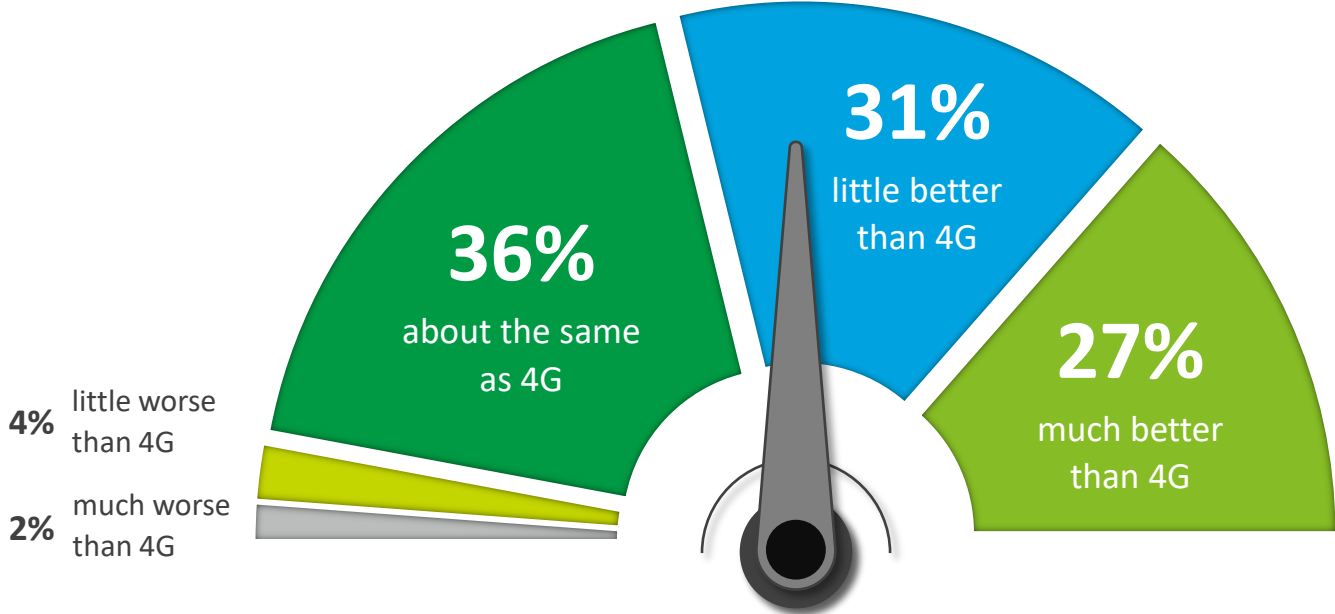


# Mobile – 5G is making a difference

Almost three in five (58%) with 5G perceive a positive difference versus 4G. Just over a quarter (27%) consider it "much better than 4G". In contrast, 36% consider the quality about the same. This is fair, given that 5G's improved performance can be perceived mostly in terms of availability.

### Comparison of 5G and 4G

Since using a 5G network on your phone, how has your overall experience of mobile internet been?  
[Rebased to exclude those who have never used 5G, and those who Don't Know]



Weighted base: All respondents aged 16-75 years who currently have 5G on their main phone, 2023 (1,601)  
Source: Deloitte Digital Consumer Trends, UK, 2023



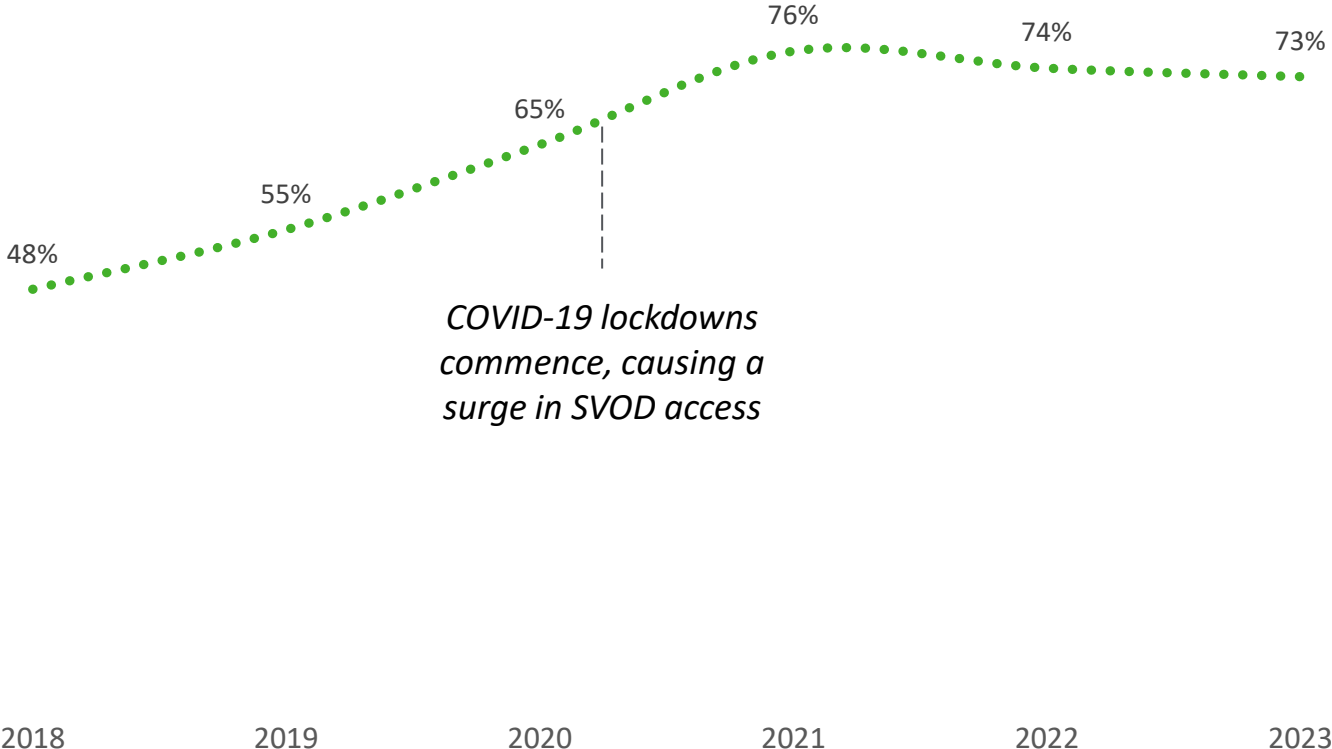


Video

# Subscription video on demand adoption has been at a similar level (at 73%-76% of respondents) for the past 3 years

## Access to paid video streaming service

Which paid digital subscription services do you have access to?



During the first year of the pandemic, adoption of subscription-video-on-demand (SVOD) accelerated in the UK.

However, the adoption of paid video services appears to have reached saturation point at around 73% of households.

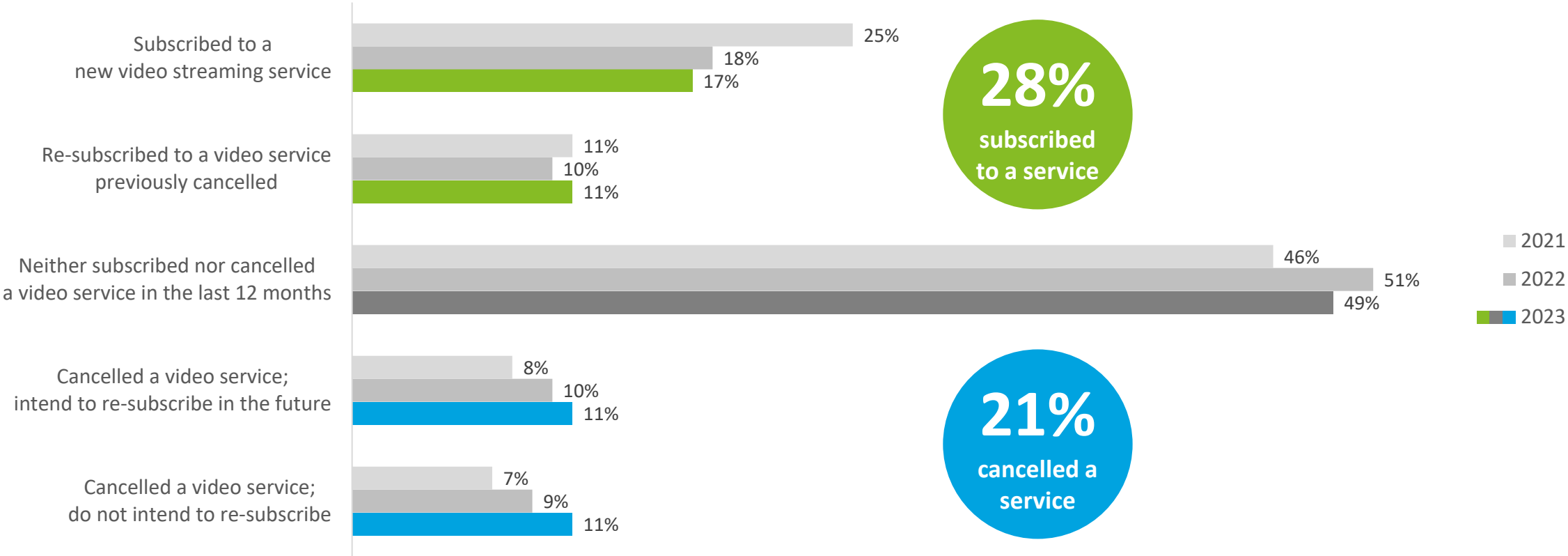
The majority of viewing in the UK, measured by hours, is of public service broadcaster (PSB) outputs. SVOD and AVOD (advertising-video-on-demand) represent about 15% of all hours viewed.

Weighted base: All respondents aged 16-75 years, 2018 (4150), 2019 (4150), 2020 (4150), 2021 (4160), 2022 (4161) 2023 (4,150)  
Source: Deloitte Digital Consumer Trends, UK, 2018-2023

# Churn is an increasingly thorny challenge for SVOD providers, with a fifth of users having cancelled a service in the past year. However, half of cancellations are only temporary.

## Subscribing to or cancelling SVOD

In the last 12 months, have you or your household subscribed to any paid subscriptions for a video streaming service, or cancelled any existing ones?

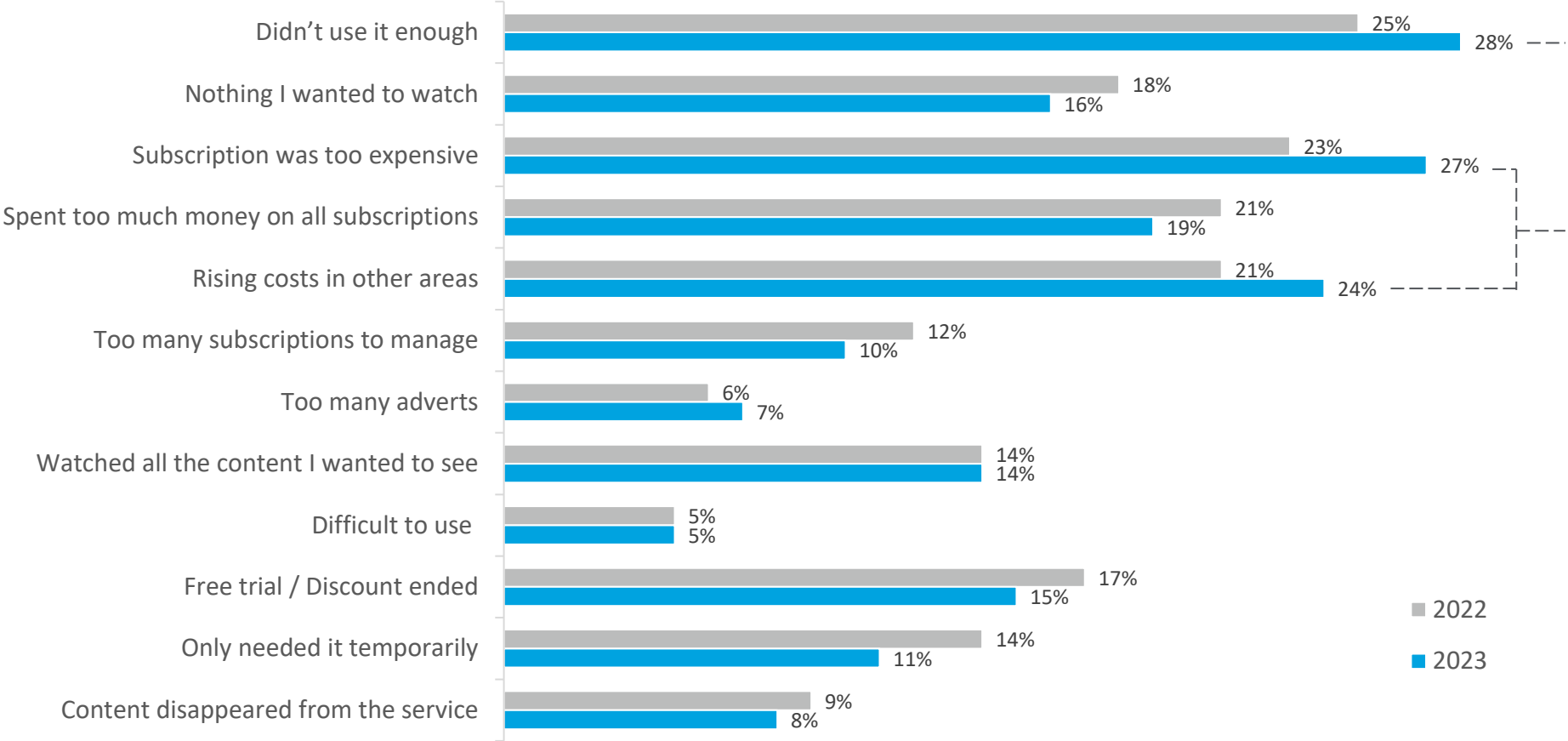


Weighted base: All respondents aged 16-75 years, 2021 (4,015), 2022 (4,011), 2023 (4,150)  
 Source: Deloitte Digital Consumer Trends, UK, 2021-2023  
 \* not shown are respondents who answered Can't Remember (11%)

# Cost challenges are driving cancellations of SVOD

## Reasons for cancelling paid video subscription

You have cancelled a paid subscription for a video streaming service in the last 12 months, why?



Lack of use remains the primary single driver of churn

Subscription cost, and rising costs in other areas, are growing reasons to cancel SVOD, as consumers react to cost of living challenges.

Weighted base: All respondents aged 16-75 years, who cancelled a paid video service in last 12 months, 2022 (1,005), 2023 (1,179)  
 Source: Deloitte Digital Consumer Trends, UK, 2022-2023  
 \* not shown are respondents who answered Don't Know (1%), Other (2%), Content inappropriate for children (3%)

# Free streaming services remain crucial, the bedrock of UK video consumption

Nine in ten consumers (88%) use free video streaming services, like BBC iPlayer, ITV X, and YouTube. Public service broadcasters which have developed streaming platforms continue to dominate viewership figures in the UK. For some who have cancelled SVOD in recent months, free streaming alternatives provide a high-quality fall-back.

Combining both viewers of SVOD and free streaming, a remarkable 94% of UK citizens claim to stream video. Streaming is truly ubiquitous, even if the business model for some forms of distribution might require change.

### SVOD, free streaming, or both

Which of the following paid subscription accounts do you have access to?\*

Which of the following free video streaming services do you currently use?\*

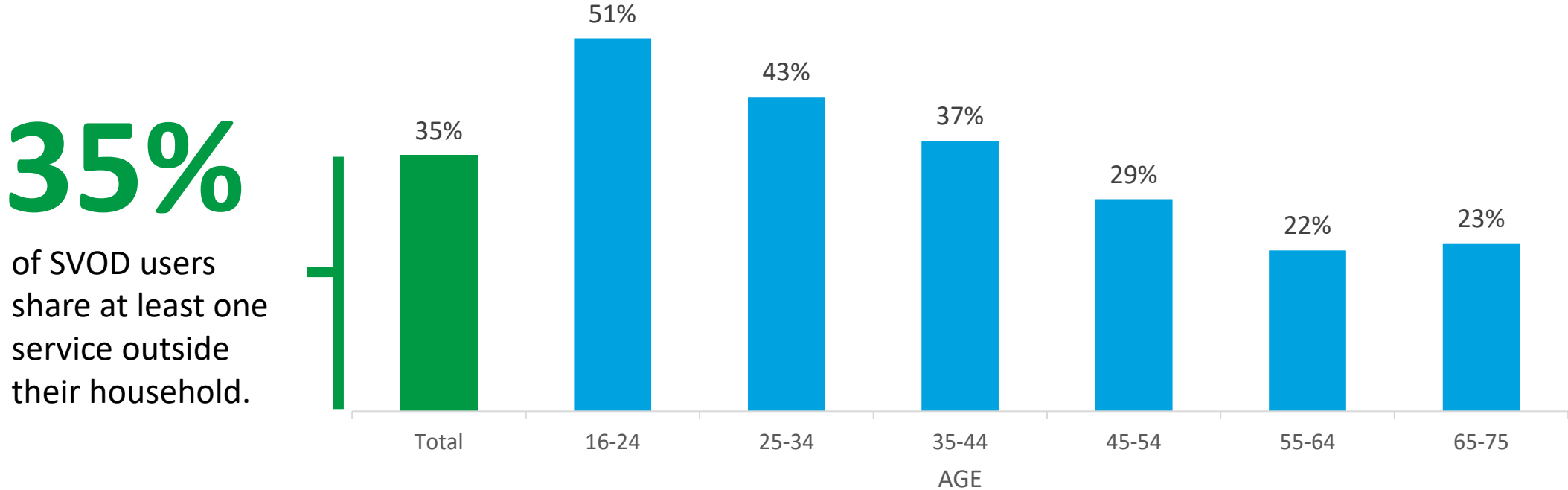


Weighted base: All respondents aged 16-75 years, 2023 (4,150)  
Source: Deloitte Digital Consumer Trends, UK, 2023  
\*Respondents were given a selection of popular accounts to choose from, including "Other" option

# SVOD account sharing is mainstream

Consumers may share a video subscriptions outside of their household, but this can violate the terms of use. Consumers were asked about multi-household sharing of three major video services; 35% share at least one with other people outside of their home. Incredibly, for each of the three platforms, an average of 11% of respondents claimed it was shared with three or more households. As SVOD prices have risen over the years, consumers have organised themselves to achieve the best economic outcomes. For many, account sharing may be seen as a victimless crime.

**SVOD users sharing at least one service outside of their household, by age**  
How many households share the following accounts?\*



Weighted base: All respondents aged 16-75 years who have access to a specific paid video subscription service, 2023 (2,274/1,725/1,313)  
Source: Deloitte Digital Consumer Trends, UK, 2023  
\*Asked of three major streaming services

# For each major SVOD platform, two in five users on average are sharing the cost

Subscription video services are worth different amounts to different people.

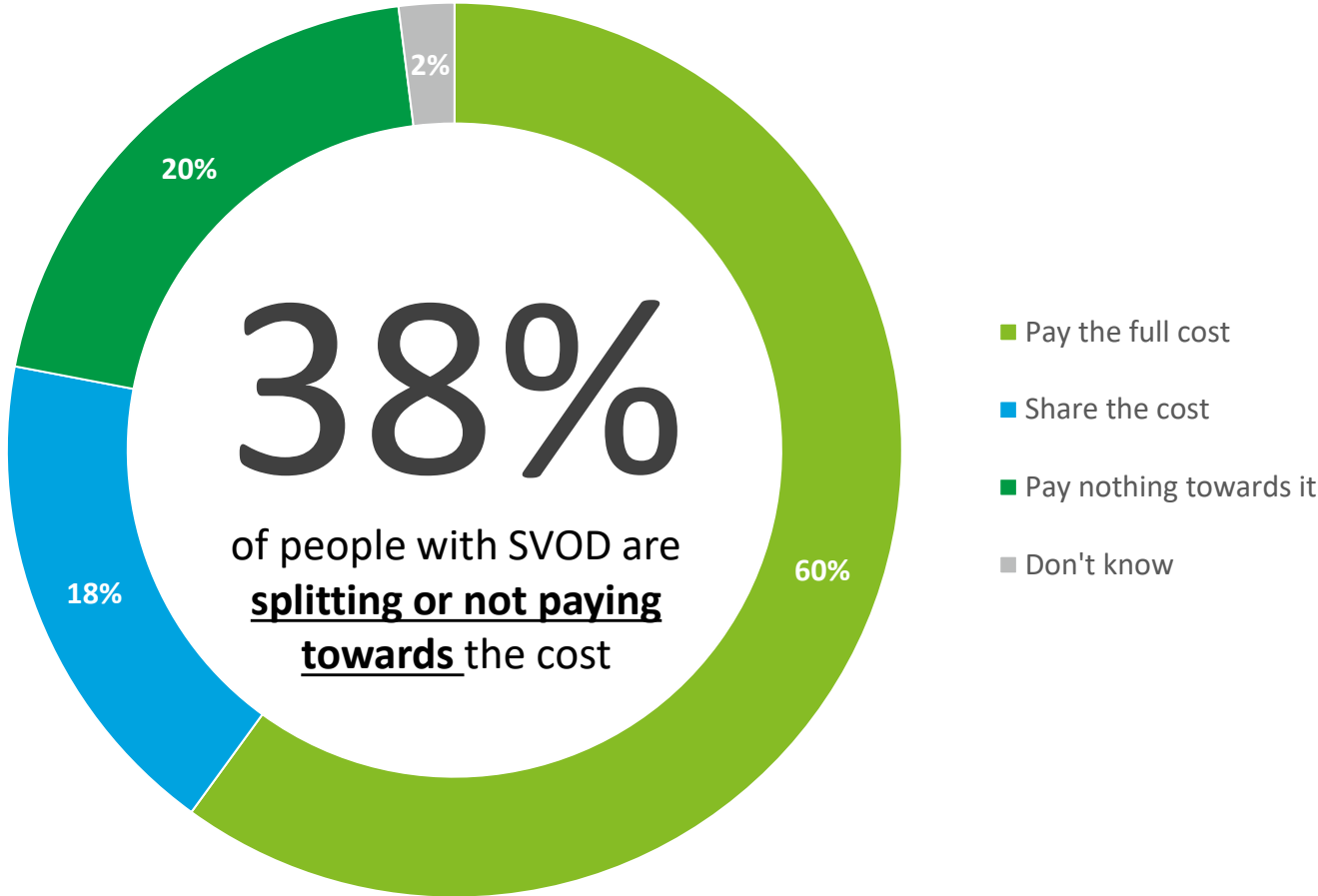
Over half of users (60% on average, across three major platforms) pay the entire cost themselves.

In other cases, around a fifth (18%) organise themselves into groups, splitting the total price between them. This group may derive less value, or may just be opportunistic.

The final fifth (20%) pay nothing at all, probably derive the least utility from SVOD, and are high-risk to stop watching if forced to stop sharing.

## Sharing the cost of SVOD

For the following video streaming services, who pays for it? \* [Average]



Weighted base: All respondents aged 16-75 years who have access to a specific paid video subscription service, 2023 (2,274/ 1,725/ 1,313)  
Source: Deloitte Digital Consumer Trends, UK, 2023  
\*Asked of three major streaming services, mean average



# Consumers may be open to AVOD if sharing is no longer available

## Behaviour if account sharing was banned

If sharing video subscription service accounts with people outside your household was banned, would you consider any of the following?

### Pay the same amount, but have adverts



### Pay extra to share, but less than full price



### Take out a new account at full price



■ Definitely would ■ Probably would ■ Don't know ■ Probably would not ■ Definitely would not

Weighted base: All respondents aged 16-75 who have access to any paid video subscription service, 2023 (3,020)  
Source: Deloitte Digital Consumer Trends, UK, 2023





Generative AI

# Half of consumers have heard of Generative AI

Generative AI knowledge  
Which Generative AI tools have you heard of\*?

A small majority of UK consumers have heard of a Generative AI tool, such as ChatGPT, Snapchat My AI, Google Bard, or Midjourney.

Given the recent launch of such tools, the top four being launched since November 2022, recognition by 52% is an achievement.

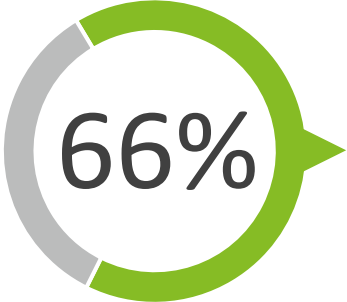
However, knowledge skews towards males, higher incomes, and younger people – and so is aligned with the biases already present in the technology industry.



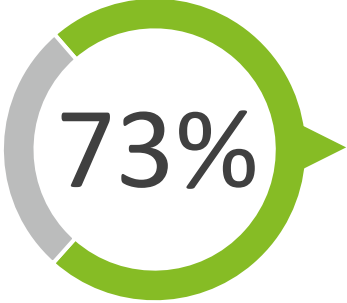
of people are aware of  
Generative AI



of men have heard of it  
*[vs 46% of women]*



of households earning over £50,000, have heard of it  
*[vs 47% of those below £30,000]*



of under 35s have heard of it  
*[vs 27% of 65-75s]*

Weighted base: All respondents aged 16-75 years, 2023 (4,150), men (2,030), household income over £50,000 (1,046), under 35 (1,330)  
Source: Deloitte Digital Consumer Trends, UK, 2023  
\*Respondents were given a range of popular Generative AI tools to choose from, including option for "Another Generative AI tool"

# Three in four citizens are yet to use a Generative AI tool

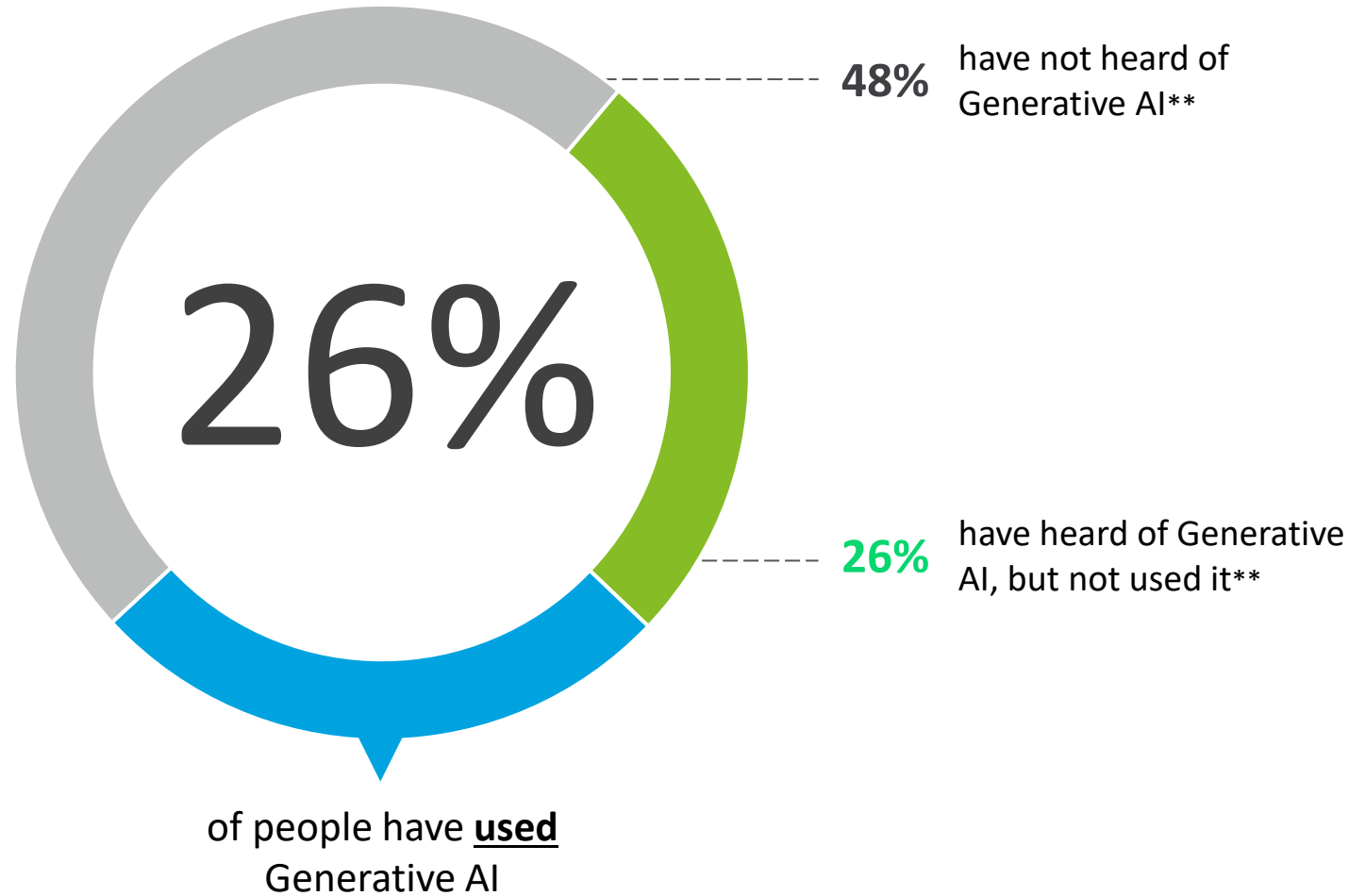
A quarter of people have used a Generative AI tool (such as ChatGPT, Google Bard, Midjourney, etc.)

Importantly, most current Generative AI tools are free, or have free versions, and are accessible on any smartphone or computer, meaning the barrier to access is zero.

Half of people who have heard of these tools have not felt inspired or confident enough to try them.

Had this question been asked a year ago, however, knowledge and usage would likely have been non-existent.

Generative AI usage  
Which Generative AI tools have you used\*?



Weighted base: All respondents aged 16-75 years, 2023 (4,150)

Source: Deloitte Digital Consumer Trends, UK, 2023

\*Respondents were given a range of popular Generative AI tools to choose from, including option for "Another Generative AI tool"; \*\*Includes respondents who selected "Don't Know", to awareness (4%), and usage (1%)

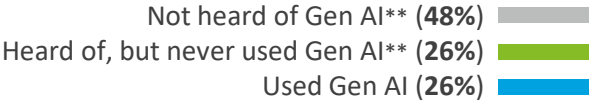
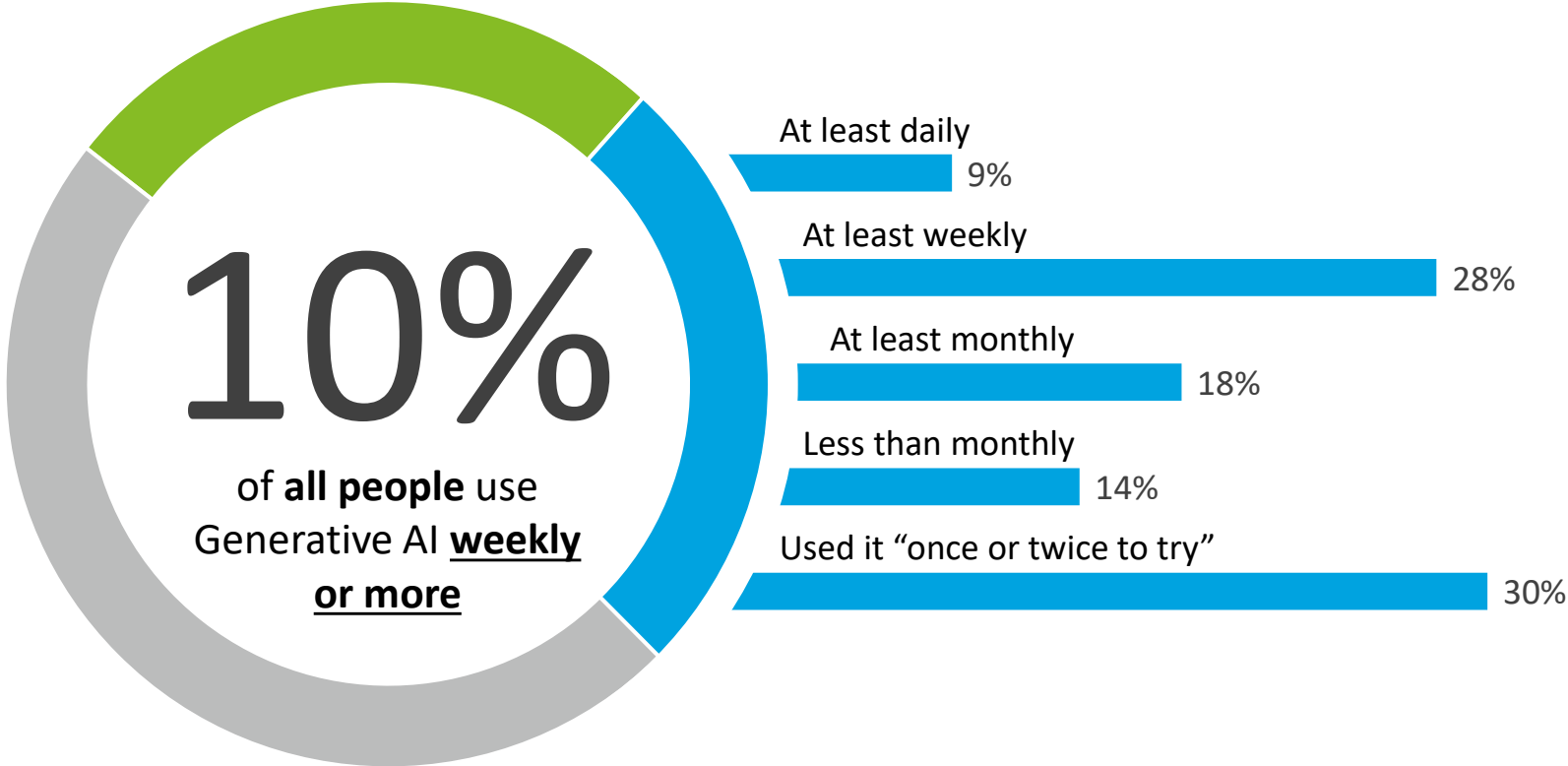
# Most people who have used Generative AI are infrequent users

Of those who have used Generative AI, one in ten (9%) do so daily, and three in ten (28%) do so weekly. Of the adult population, this would be 2% and 7% respectively. These people have likely found tangible utility which makes them more productive.

On the other hand, almost a third (30%) have used Generative AI only once or twice. For these people, it may have been inaccuracy, an unclear corporate policy, or simply a lack of knowledge on how to write good prompts that prevented them from returning.

**Generative AI: frequency of use**  
Which Generative AI tools have you used\*?

Which best describes your use?  
[for those who have used Generative AI]



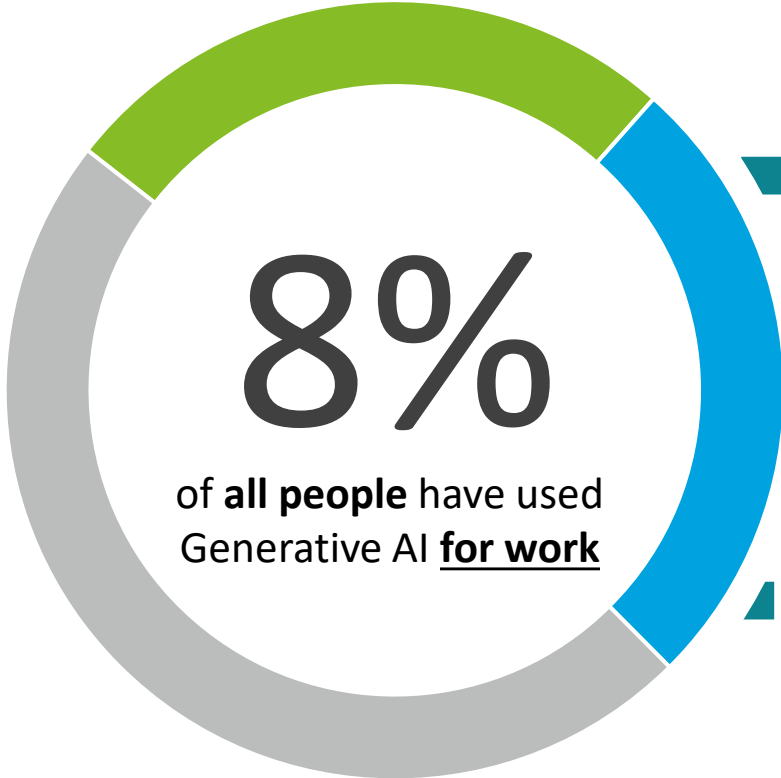
Weighted base: All respondents aged 16-75 years (4,150), who are aware of any Generative AI tool (2,178), who have used any Generative AI tool (1,096)  
Source: Deloitte Digital Consumer Trends, UK, 2023  
\*Respondents were given a range of popular Generative AI tools to choose from, including option for "Another Generative AI tool"; \*\*Includes respondents who selected "Don't Know", to awareness (4%), and usage (1%)

# Four million people in the UK have used Generative AI for work

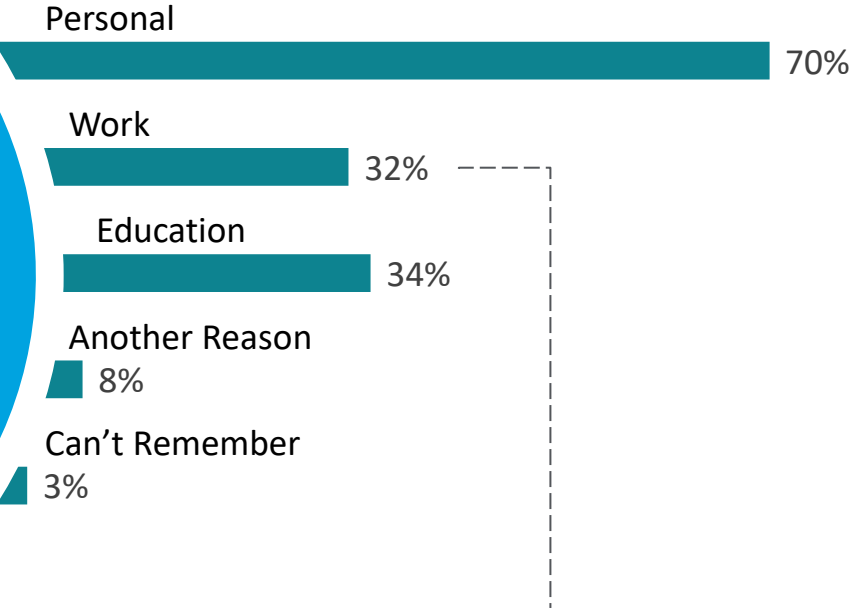
Around a third of users (32%) claim to have used Generative AI for work. This is equivalent to about 8% of the UK population, or approximately 4 million people.

Given the lack of corporate policy and governance, it is fair to assume that a portion of this use was unsanctioned; and without clear, mandated education employees may have been at risk of sharing confidential information, or failing to recognise hallucination and bias.

**Generative AI: purpose of use**  
Which Generative AI tools have you used\*?



Which purposes have you used Generative AI for?  
[for those who have used Generative AI]



*Approximately 4 million people, have used Generative AI for work*




Weighted base: All respondents aged 16-75 years (4,150), who are aware of any Generative AI tool (2,178), who have used any Generative AI tool (1,096)  
Source: Deloitte Digital Consumer Trends, UK, 2023  
\*Respondents were given a range of popular Generative AI tools to choose from, including option for "Another Generative AI tool"; \*\*Includes respondents who selected "Don't Know", to awareness (4%), and usage (1%)

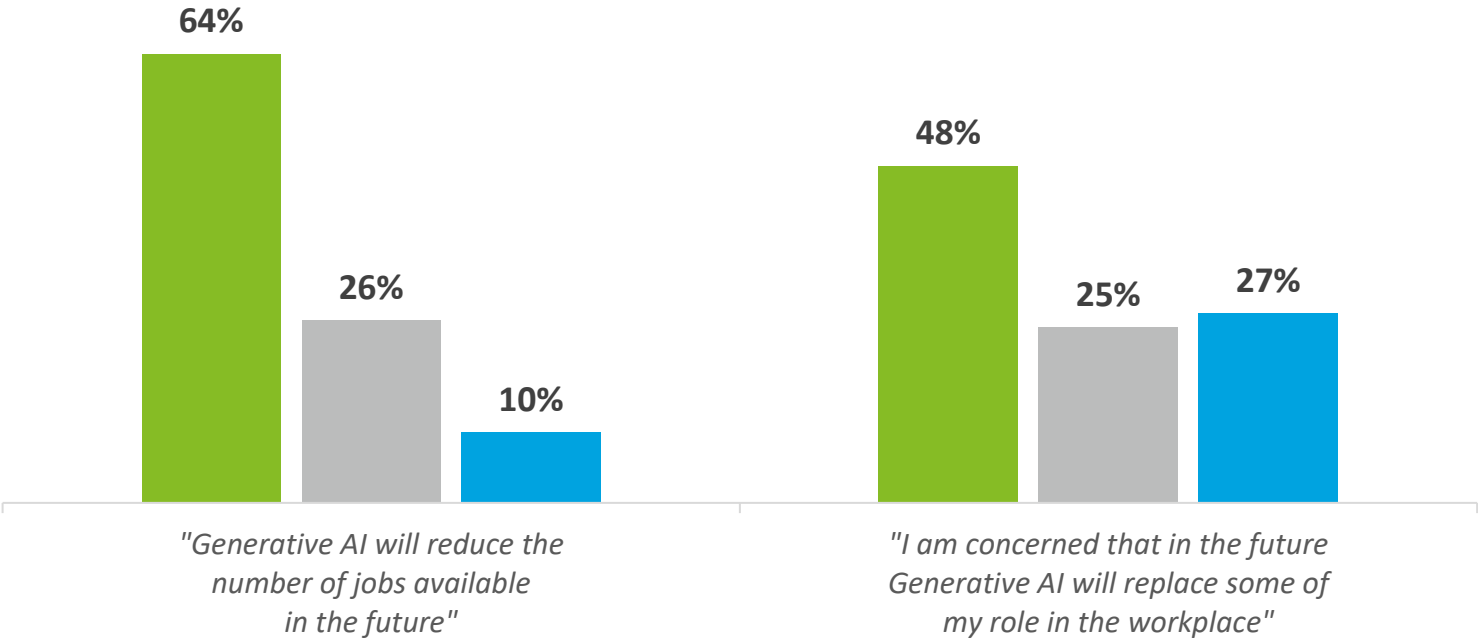
# Workers concerned that AI may replace them or change their roles

Consumers assume that Generative AI tools will be able to replicate functions of their work, and may lead to a decrease in the stock of jobs. Economists would argue this is unclear, and perhaps unlikely, but as consumer interest grows the issue may become politically charged.

### Agreement statements – Jobs

Do you agree or disagree with the following statements?  
[for those who are aware of Generative AI]

Agree   
Neither, or Don't Know   
Disagree 



Weighted base: All respondents aged 16-75 years who are aware of any Generative AI tool (2,178)  
Source: Deloitte Digital Consumer Trends, UK, 2023

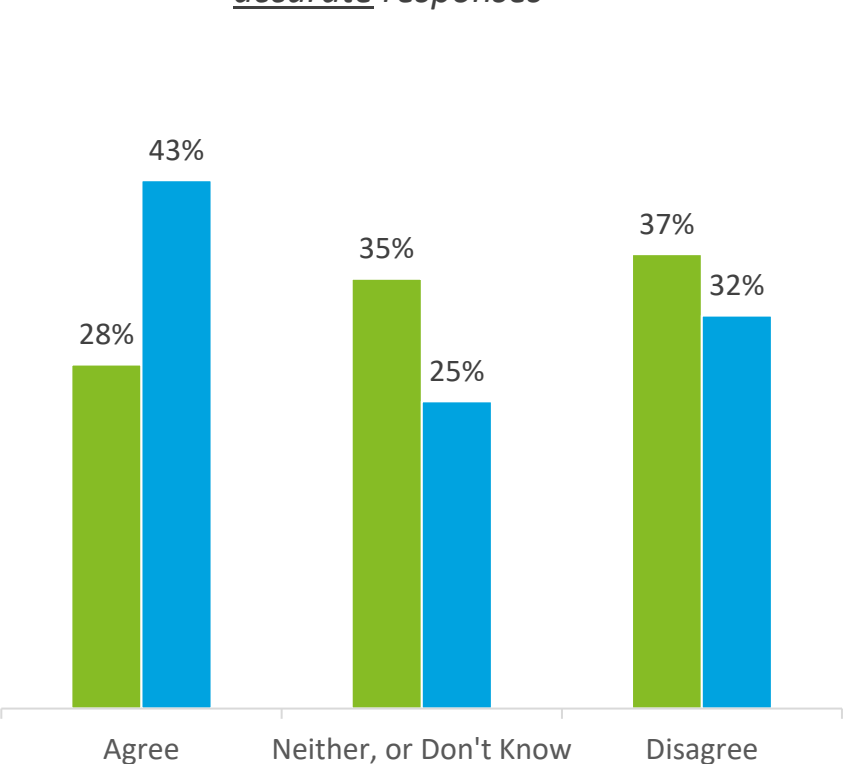


# Consumers can be ignorant about Generative AI's flaws

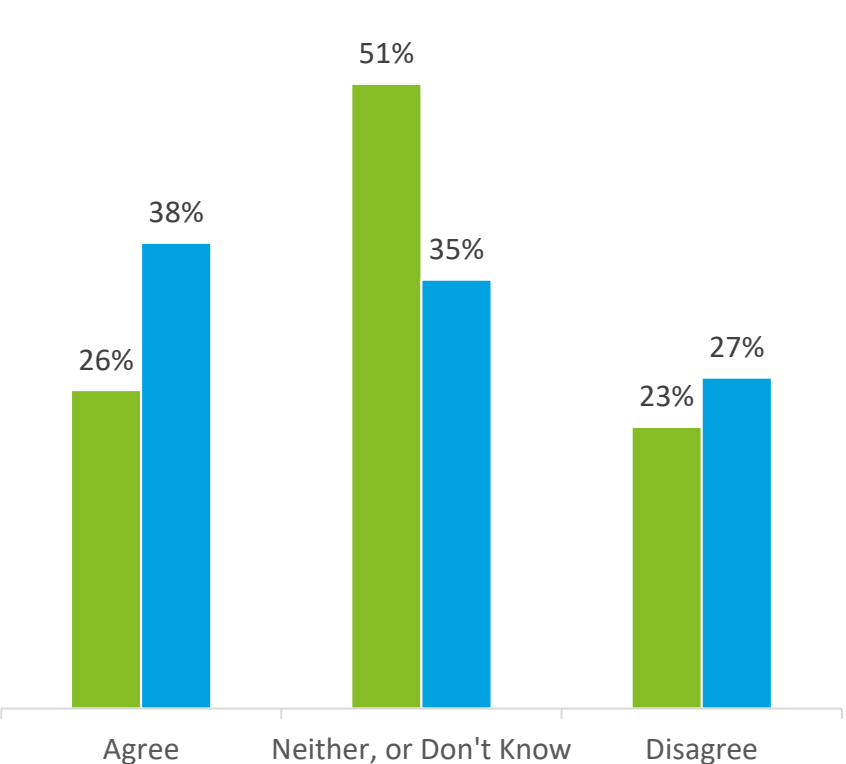
## Agreement statements – Accuracy and bias

Do you agree or disagree with the following statements?

*“Generative AI always produces factually accurate responses”*



*“Generative AI responses are unbiased”*

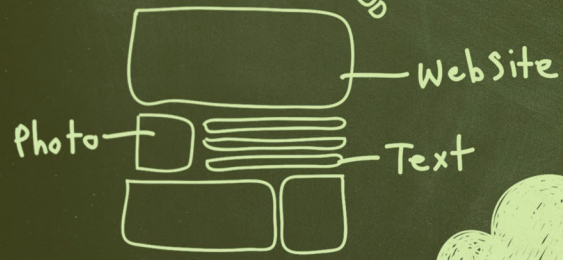


Weighted base: All respondents aged 16-75 years (4,150), who are aware of any Generative AI tool (2,178), who have used any Generative AI tool (1,096)  
Source: Deloitte Digital Consumer Trends, UK, 2023



exchange information and ideas in virtual communities and network.

SEARCH 

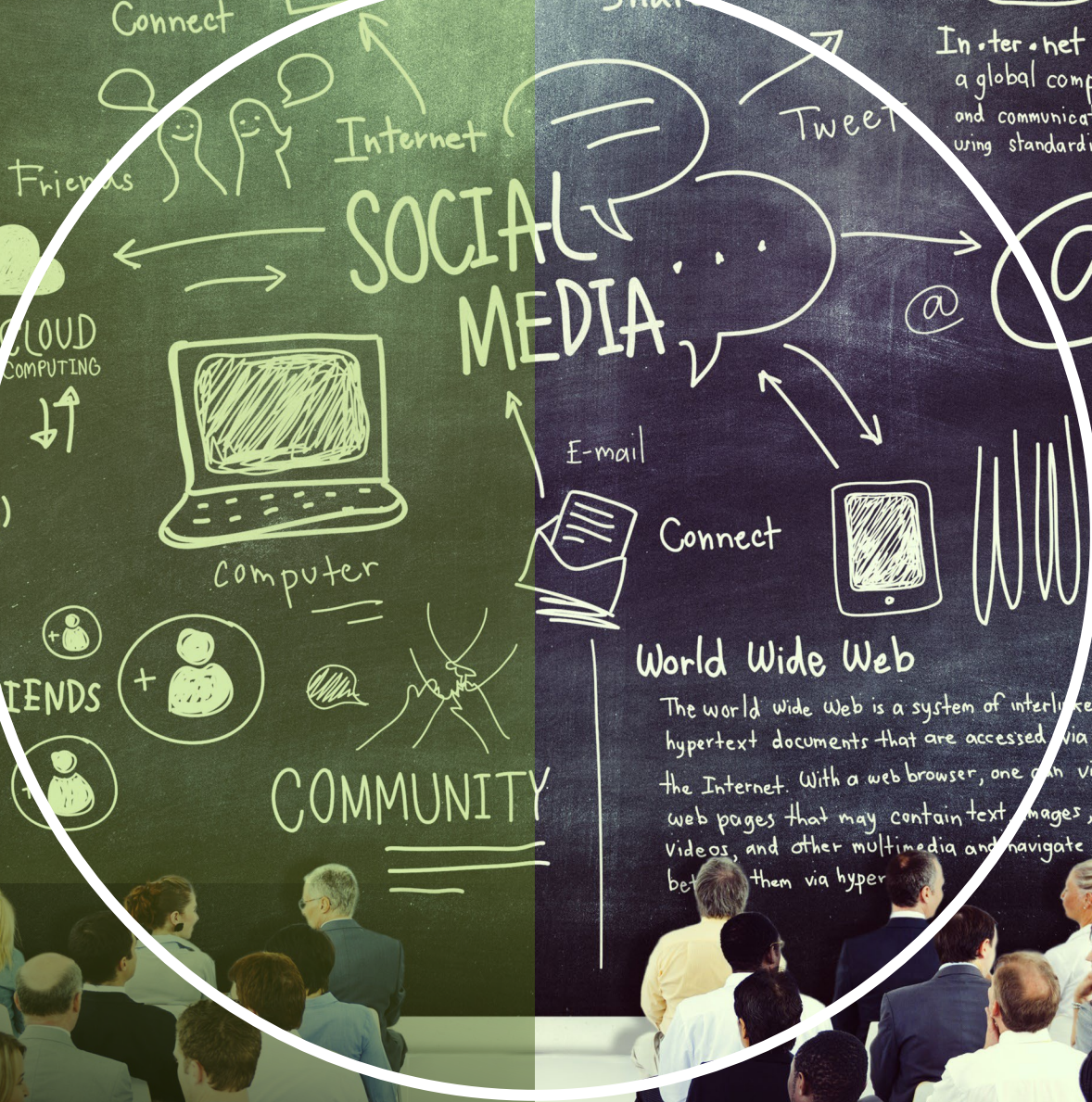


Web-site


a location connected to the Internet that maintains one or more pages on the World Wide Web

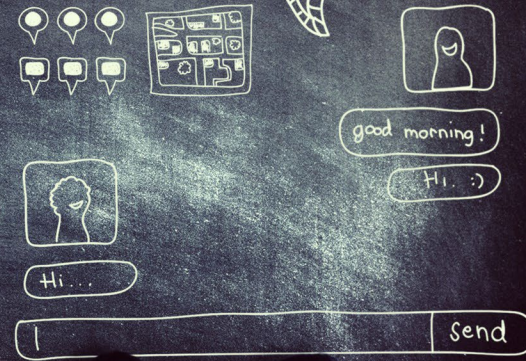


Online behaviours



In-ter-net  
a global computer network providing a variety of information and communication facilities, consisting of interconnected networks using standardized communication protocols.

friend   
noun  
① a person whom one knows and with whom one has a bond of mutual affection, typically exclusive of sexual or family relations.  
② (Friend) a member of the Religious Society of Friends; a Quaker.



World Wide Web

The world wide Web is a system of interlinked hypertext documents that are accessed via the Internet. With a web browser, one can view web pages that may contain text, images, videos, and other multimedia and navigate between them via hyper

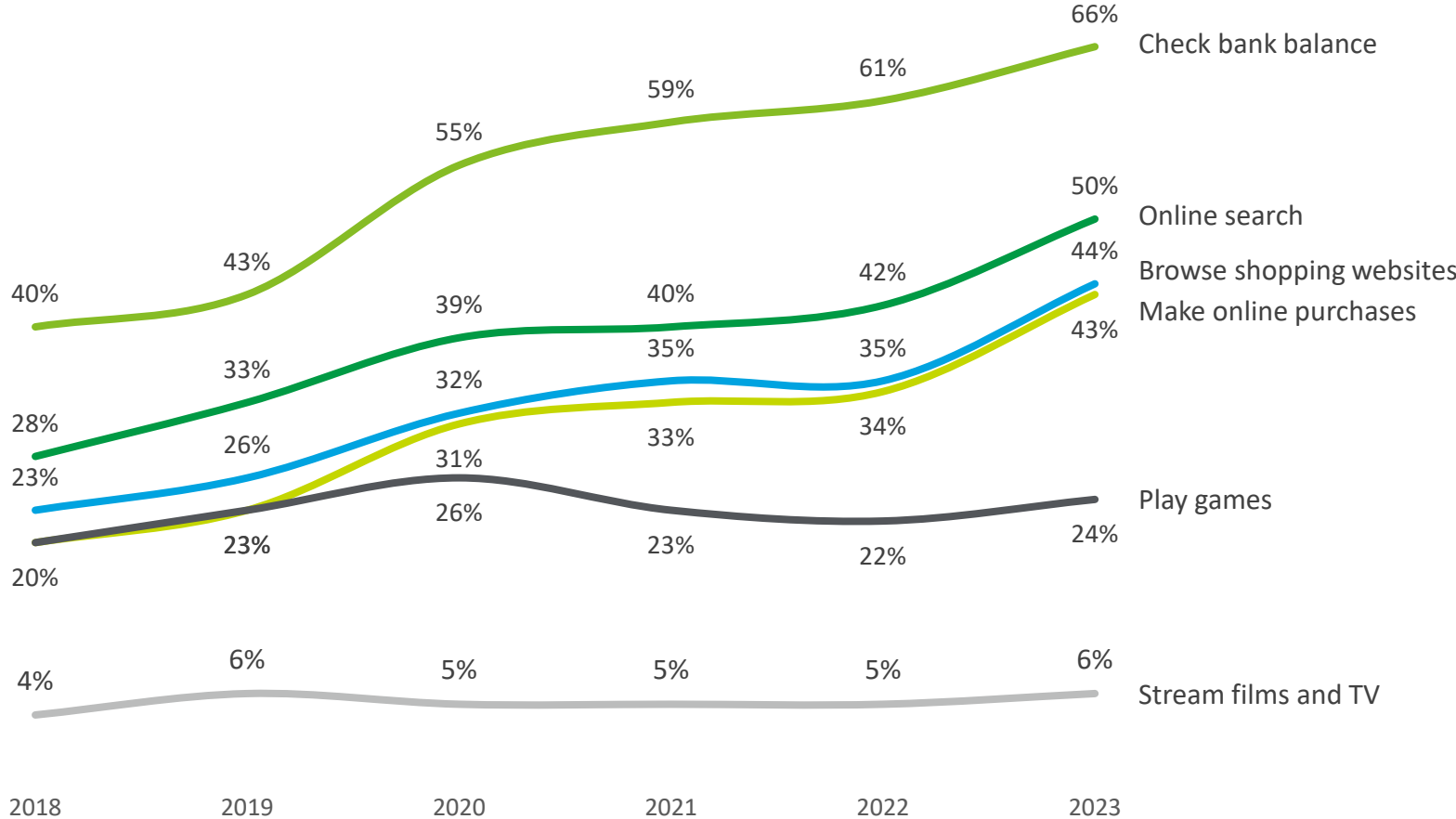
# Smartphones are more important than ever for online applications

Consumer reliance on smartphones is growing. Smartphones are gradually displacing all other devices (e.g. laptops, tablets) for many functions such as search and online shopping.

However, for long-form content such as streaming video, consumers still gravitate to the big screen, preferring smart TV.

## Smartphones as preferred device for activities

Which, if any, is your preferred device for each of the following activities?  
[Mobile phone]



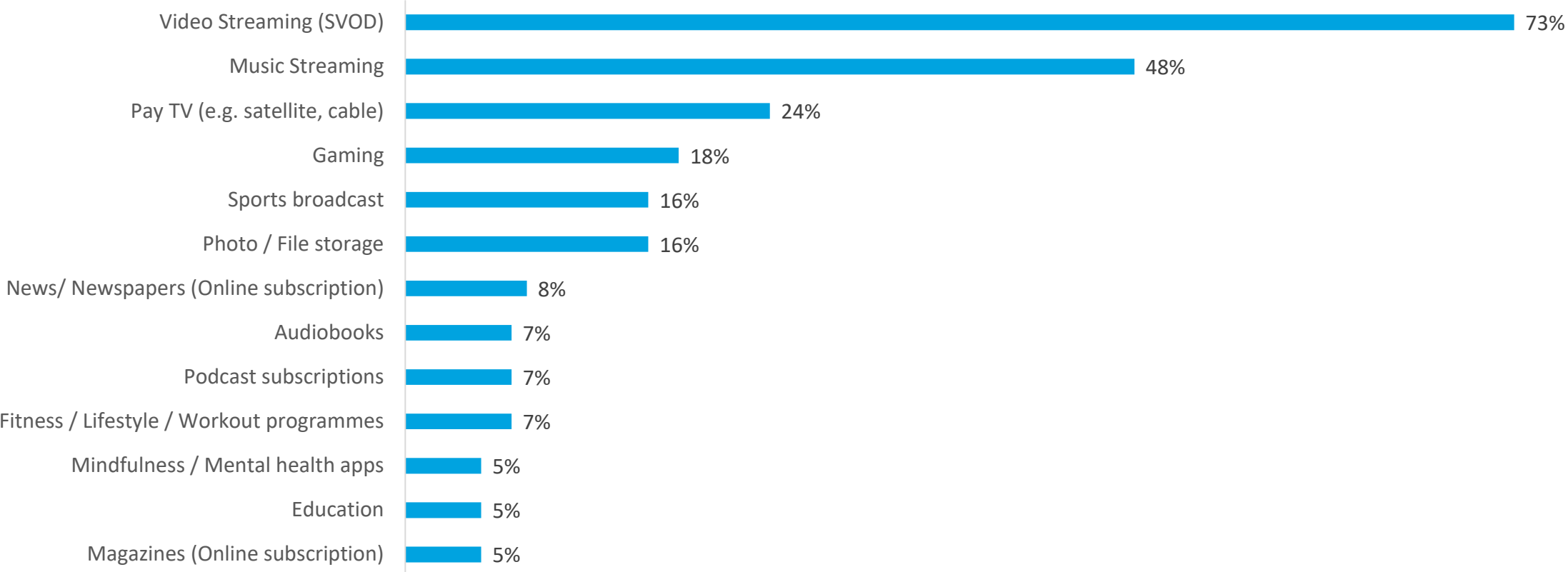
Weighted base: All respondents aged 16-75 years, who have a phone, 2018 (3,959), 2019 (3,952), 2020 (3,990), 2021 (1,982), 2022 (1,973), 2023 Sample B (1,976)  
Source: Deloitte Digital Consumer Trends, UK, 2018-2023

# Several types of digital subscription remain niche

## Access to digital subscriptions

Which, if any, of the following paid digital subscription services do you have access to? (SVOD and Music only)

Thinking about paid services or subscriptions, which, if any, of the following do you have access to?\*



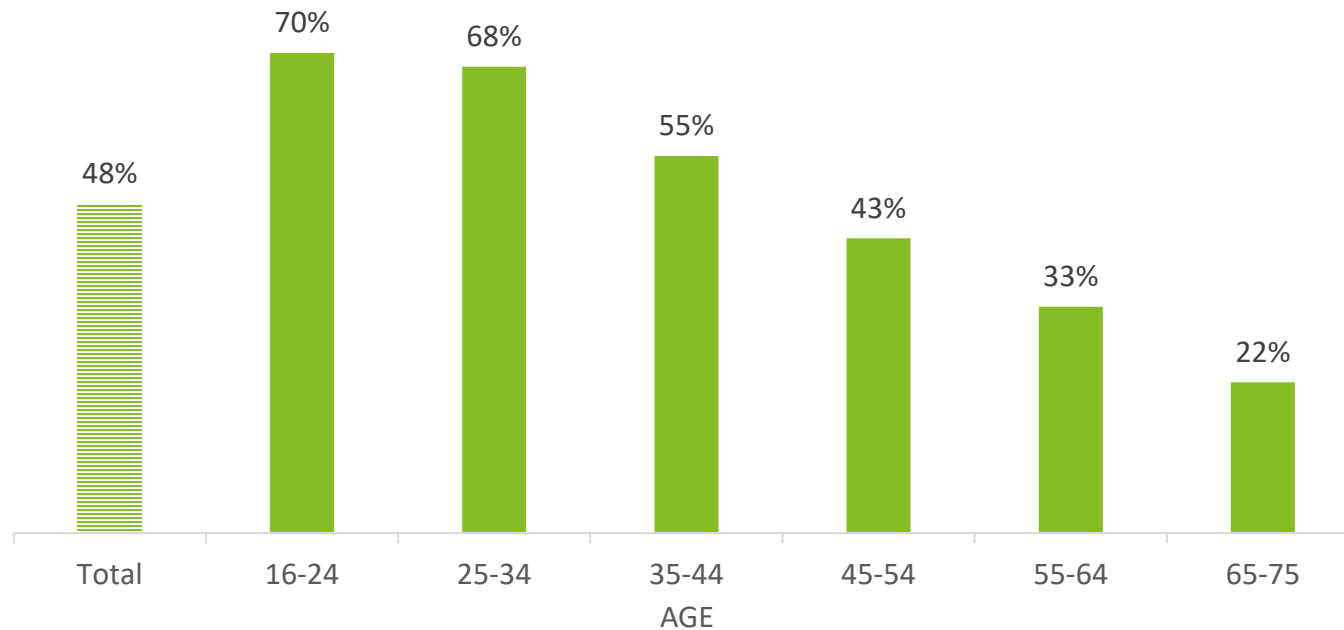
Weighted base: All respondents aged 16-75 years, 2023 (4,150)  
Source: Deloitte Digital Consumer Trends, UK, 2023  
\*not shown are respondents who answered None of These, Don't Know

# Almost 70% of 16-34 year-olds have a paid music subscription

The youngest respondents this year were born after Spotify was founded in 2006: they have never lived in a world without music streaming. The youngest age group also has the highest incidence (70%) of having a paid music subscription. In contrast just over a fifth (22%) of 65-75 year olds have a music subscription.

## Access to paid music streaming service

Which paid digital subscription services do you have access to\*? (Music)



Weighted base: All respondents aged 16-75 years, 2023 (4,150)

Source: Deloitte Digital Consumer Trends, UK, 2023

\*Respondents were given choices, including Apple Music, Spotify Premium, YouTube Music, Amazon Music Unlimited, Amazon/Prime Music, and others.

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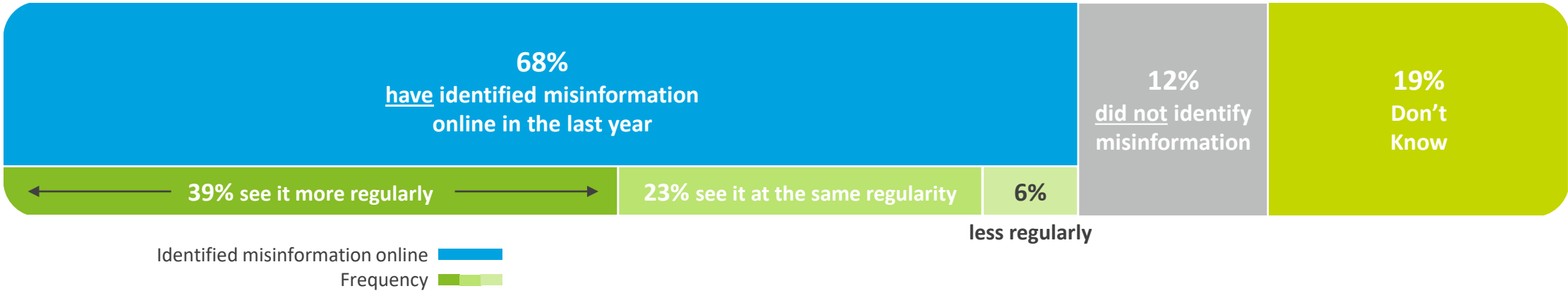
# Digital users are highly exposed to misinformation online

Misinforming is a human behaviour that stretches back thousands of years: the creation of fake news is not the fault of the internet, but the speed at which misinformation can be created and spread is arguably a function of digital capabilities.

Overall two-thirds of people (68%) claim to have seen deliberate misinformation online in the past year. Crucially, this only accounts for people who feel they have identified misinformation. Some may have been misinformed, but be unaware of it. Almost half of those with an opinion on the quantity of misinformation thought they were seeing it more regularly.

## Fake news on social media

Are you seeing misinformation more, or less regularly than 12 months ago?\*



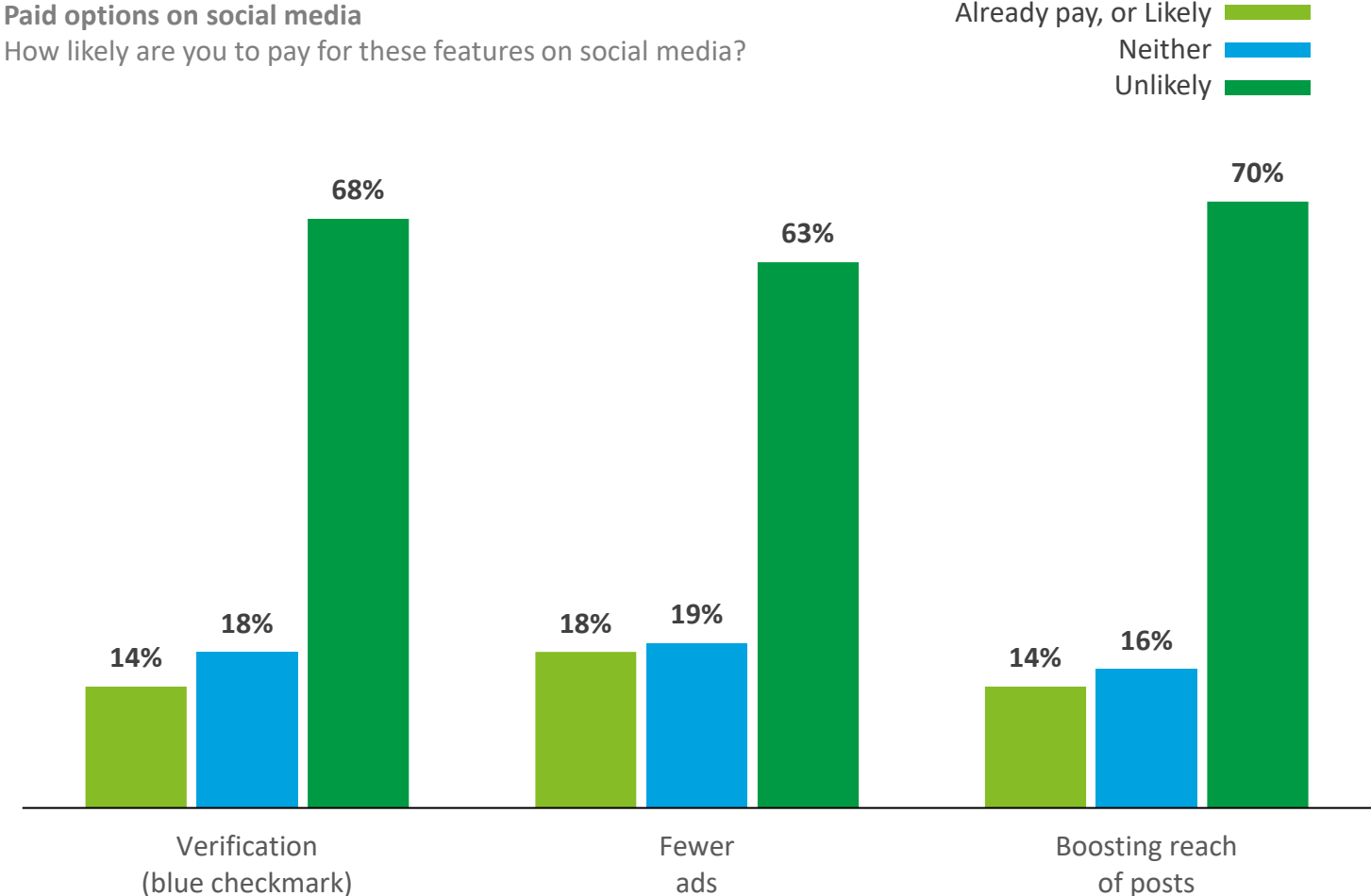
Weighted base: All respondents aged 16-75 years, 2023 (4,150)  
Source: Deloitte Digital Consumer Trends, UK, 2023

\*Full question: The next question is about information that is presented to be true on social media, but is subsequently proven to be fake. For example, a doctored video, altered photo, untrue articles, misinformation, or content with misleading captions. These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?; "Don't know removed", and data rebased.

# Consumers not yet sure about paying to be 'verified' on social media

Social media platforms are mostly ad-funded. For most, users can access a site for free, but at the price of their personal data and interests, which can be harnessed to refine ad targeting.

However, some platforms are experimenting with new monetisation strategies, which build on, rather than replace, adverts. For example, allowing users to pay for 'verification', a blue checkmark (or tick) of authenticity. A number of users (14%) are likely to do this, or already do so. But reception has varied, as it might risk denigrating trust in verification altogether.



Weighted base: All respondents aged 16-75 years, 2023 (4,150)  
Source: Deloitte Digital Consumer Trends, UK, 2023

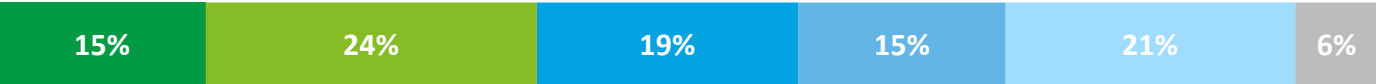
# Sharing personal information with law enforcement

Consumers have mixed views about sharing personal information with law enforcement, even for the purpose of fraud prevention. There is no resounding appetite to share biometric data, location data, or browsing habits.

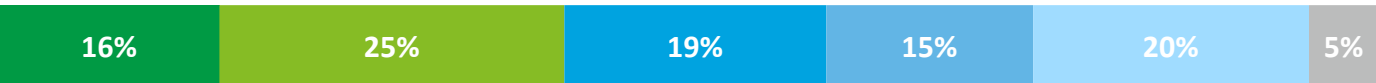
## Willingness to share personal information

How willing would you be to provide law enforcement with the following information, if it meant more effective protection from online fraud?

### A digital record of my face



### The location of my phone



### My browsing history



■ Very willing ■ Fairly willing ■ Neither ■ Fairly unwilling ■ Very unwilling ■ Don't know

Weighted base: All respondents aged 16-75 years, 2023 (4,150)  
Source: Deloitte Digital Consumer Trends, UK, 2023





Cost of Living  
Impacts

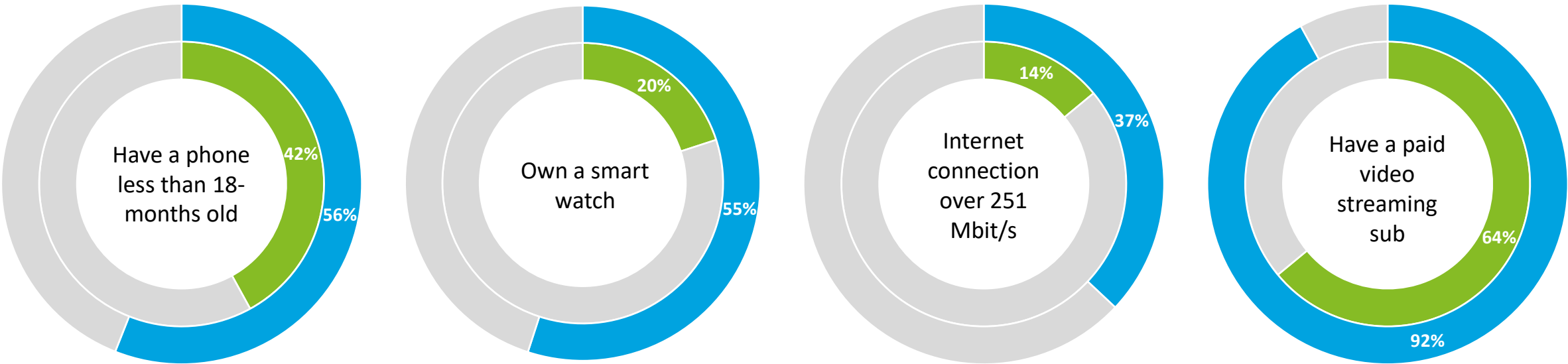


# Higher-income households have more and better digital products and services

Households in higher income groups are more likely to have newer smartphones and own a smart watch, have faster internet speeds, and use more digital services.

## Households: Lower income vs higher income

Which of the following devices do you own or have ready access to?  
 How fast is the home internet connection you currently have?  
 Which of the following paid subscription accounts do you have access to?\*



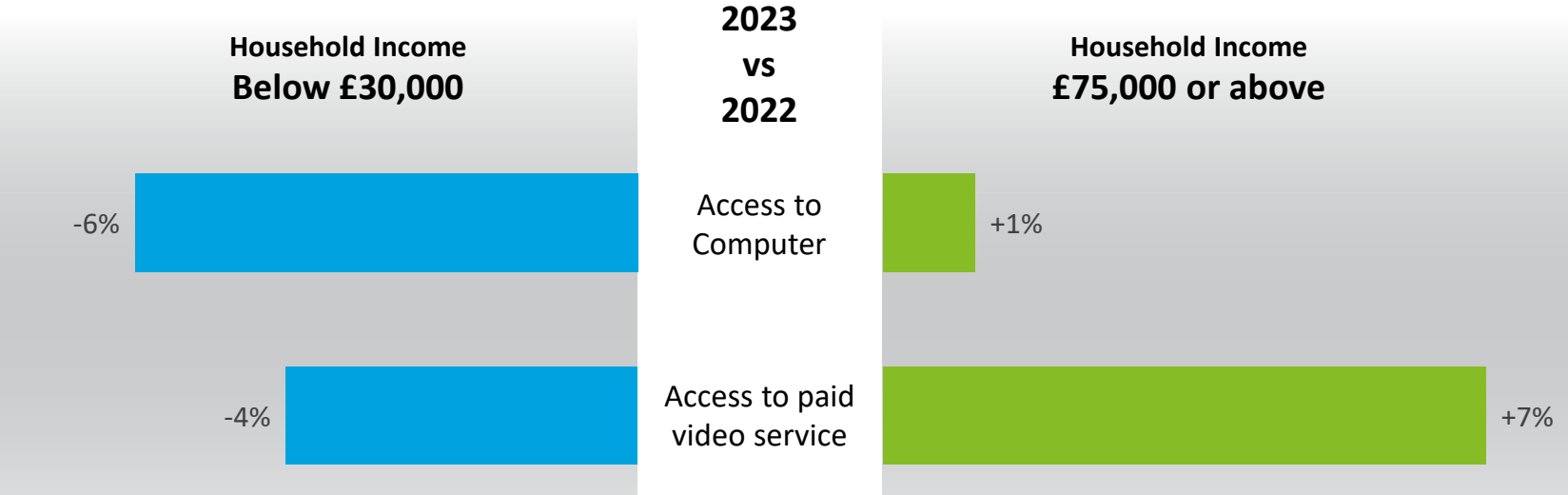
Weighted base: All respondents aged 16-75 years, 2023, Household Income under £30,000 (1,575), Household Income over £75,000 (473)  
 Source: Deloitte Digital Consumer Trends, UK, 2023  
 \*Respondents were given a selection of popular accounts to choose from, including "Other" option

# Digital divide widens between higher and lower incomes

Compared with last year, lower-income households are less likely to have access to a computer, and less likely to have video and music subscriptions. It is likely that these groups are forced to cut back on digital consumption due to rising costs in other areas, such as energy and groceries.

### Households: Lower income vs higher income, year-on-year

Which of the following devices do you own or have ready access to?  
Which of the following paid subscription accounts do you have access to?\*



Weighted base: All respondents aged 16-75 years, 2022 Household Income below £30,000 (1,672), Household Income above £75,000 (412), 2023 Household Income below £30,000 (1,575), Household Income above £75,000 (473)

Source: Deloitte Digital Consumer Trends, UK, 2022-2023

\*Respondents were given a selection of popular accounts to choose from, including "Other" option

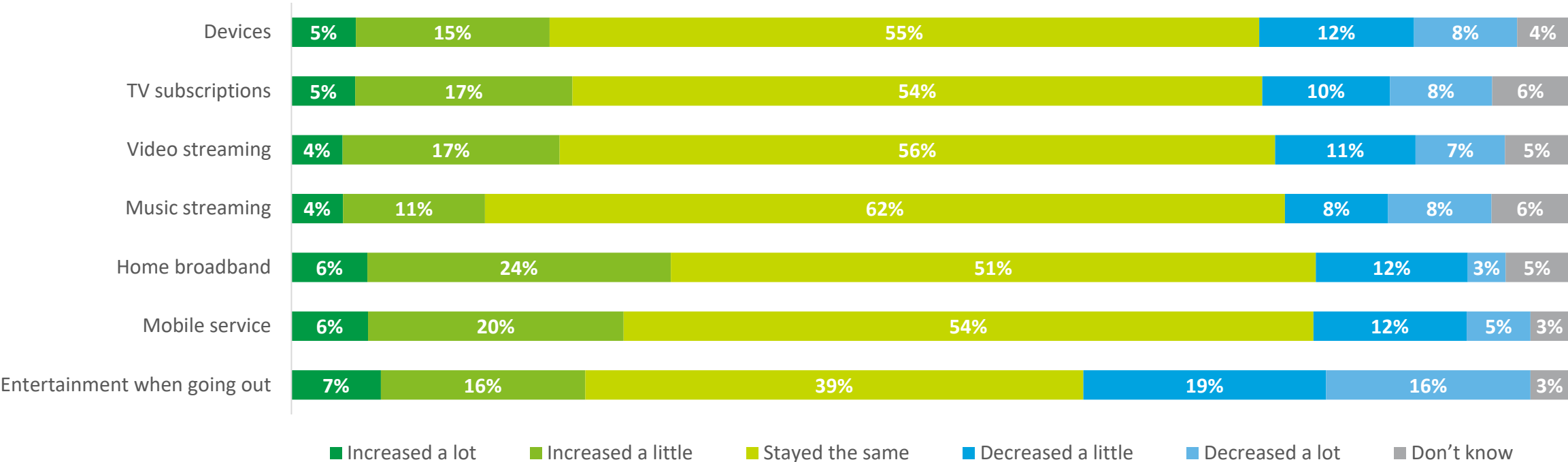


# Almost a third of respondents are spending more on broadband; most likely because of price rises

Inflation-linked price adjustments are likely behind increases in spend on home broadband and mobile over the past year. Almost a quarter (23%) of respondents have increased their spend on entertainment when going out. Only 15% of respondents are spending more on music streaming, partly because at the time of the survey some Spotify subs prices had not changed since the service launched.

## Change in spending over the last 12 months

Compared with 12 months ago, has your spending on the following changed?



Weighted base: All respondents aged 16-75 years, 2023 Sample A (2,093)  
Source: Deloitte Digital Consumer Trends, UK, 2023



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## Digital Consumer Trends 2023

For more information on the Deloitte Digital Consumer Trends UK survey, visit our hub page. Here you can find full-length reports on key topics like Generative AI and subscription video services, as well as materials from previous years.



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