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Digital Consumer Trends 2024

May 2024

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About the research

Digital Consumer Trends is a multi-country study of how people engage with and purchase digital products. It spans devices, connectivity, media and emerging technologies, and is now in its fifteenth year of publication. It was previously known as the Mobile Consumer Survey.

In 2024, the UK edition of this research comprises a nationally representative sample of 4,150 consumers, aged 16-75, and weighted for demographics such as age, gender, region and working status.

The survey took place in April 2024, and was conducted by an independent research entity. Questions cited in this document may be simplified for the sake of visualisation.

Know your acronyms

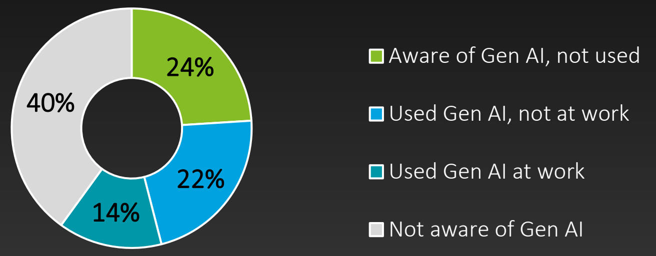
Before you dive in, get to know some of the industry terms we used in this report:

Gen AI	Generative AI
VR	Virtual Reality
AR	Augmented Reality
FWA	Fixed wireless access
SVOD	Subscription video on demand
AVOD	Ad-supported video on demand
BVOD	Broadcaster video on demand
FAST	Free ad-supported streaming television

Key takeaways

Generative AI is on everyone's lips, but is it at everyone's fingertips? Digital Consumer Trends 2024 finds generative AI has been used by 18 million people in the UK, and their responses range from euphoria to indifference. In hardware, consumers are increasingly delaying upgrading their devices, and lack trust that companies are as green as they claim. In networks, consumers are content with internet speed, but less so with reliability and coverage. In video, consumers have largely accepted sharing crackdowns (so far). And finally, online there is a concerning increase in acknowledgement of misinformation, as 'fake news' spikes ahead of UK and global elections.

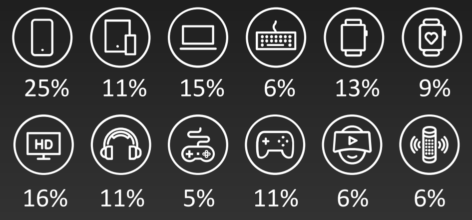
Seven million have now used generative AI at work



Generative AI has been used at work by 14% of respondents, or 7 million people, equivalent to the majority of knowledge workers. However, usage is immature: the most common applications are generating ideas and looking up information – not the best utilisation of the technology). Workers using Gen AI tend to be very positive about its impact on their productivity. However workers also feel that most companies are not encouraging its use.

One in three do not plan to purchase a device this year

Planned Purchases:

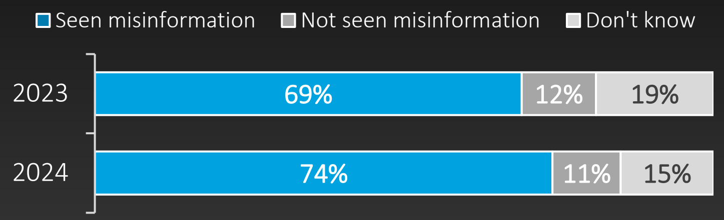


33%

do not plan to purchase a device in the next 12 months

In the 2010s a breakthrough device emerged every couple of years (e.g. tablet, smart speaker, smart watch and wireless audio). This has sequence has not carried on in the 2020s. As device innovation becomes incremental, consumers are keeping devices longer. A third do not plan to buy any new device in the next year. Some vendors have used their carbon footprint to differentiate, but consumers struggle to comprehend total impact, and 65% say companies overstate their eco-credentials.

Three in four (75%) have seen online misinformation



Fake news is not new, but it is becoming more prevalent. Interactions with digital content can impact how we think and what we do. Consumers are noticing online misinformation more, particularly among young people (87% of 16–24-year-olds in the last year), who tend to prefer social media as a news source. As consumers start to ingest news from a wider variety of sources, they need to be extra vigilant to fact-check stories, particularly ahead of elections.


GENERATIVE AI

Adoption of generative AI is up to over a third of respondents; however, two-fifths have not heard of it

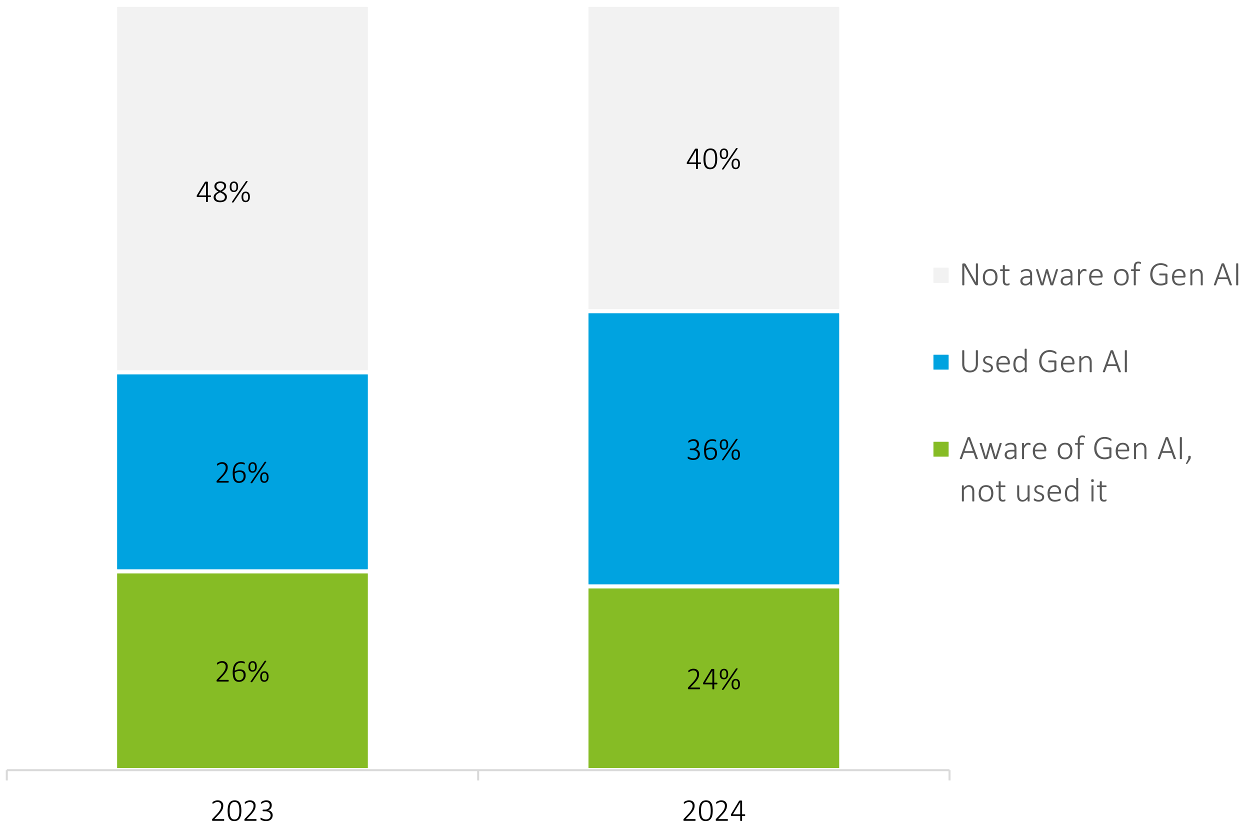
A third of UK citizens (18 million people between 16-75), have used a Generative AI tool, such as ChatGPT, Google Gemini, or Midjourney.

In the 2024 survey, 36% of consumers claimed to have used Generative AI, a 10 percentage-point increase on 2023.

Consumers who wanted to try Generative AI may have already done so: the most popular generative AI applications are easy to access, via web browser or app. Sign-up takes minutes, and most offer a free version.

Generative AI

Which Generative AI tools have you heard of?*
Which Generative AI tools have you used?**



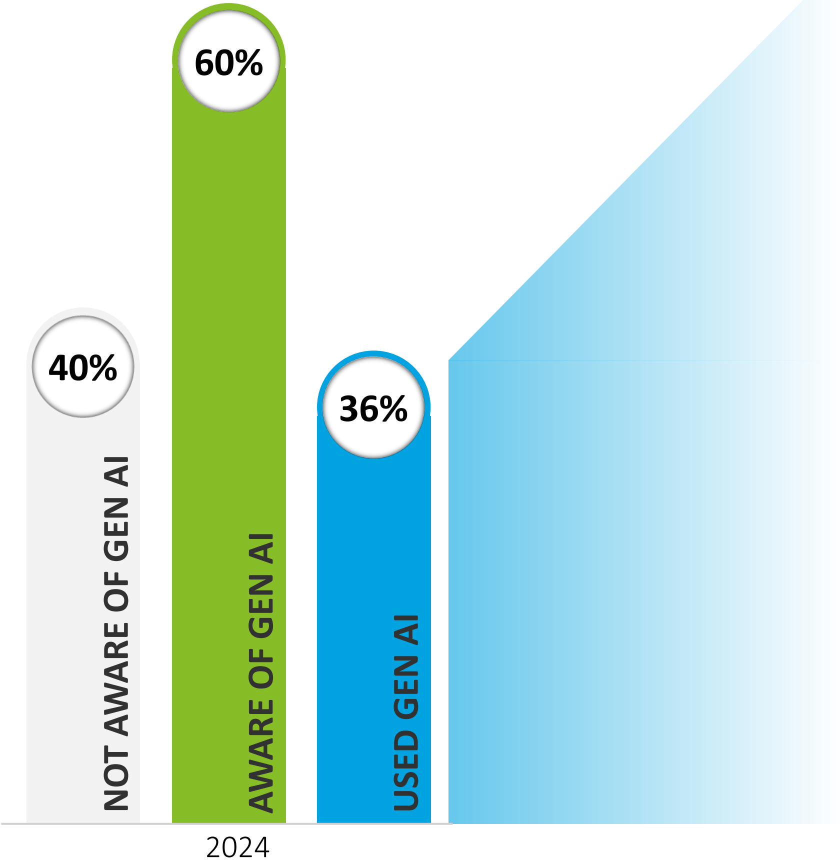
Weighted base: All respondents aged 16-75 years, 2023 (4,150), 2024 (4,150)
*Respondents given a range of Gen AI tools to choose from; including "Another"; **Those who were aware of generative AI, but did not know if they had used it were aggregated into "Aware of Gen AI, not used it".
Source: Deloitte Digital Consumer Trends, UK, 2024

Two in five who have used Gen AI now use it less than monthly

Generative AI

Which Generative AI tools have you heard of?*

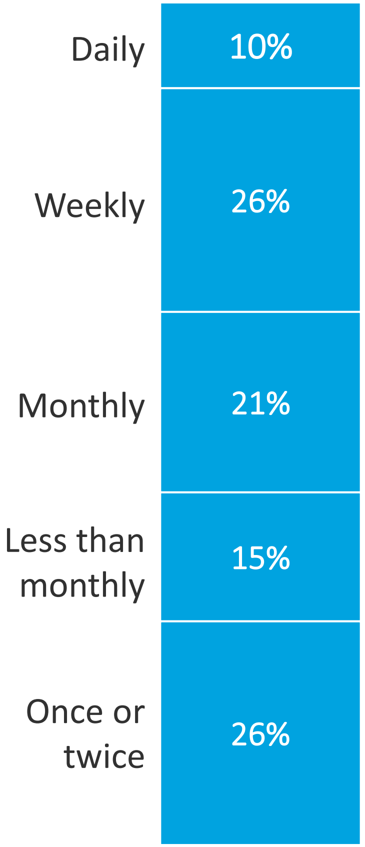
Which Generative AI tools have you used?**



Users: Frequency of Use

Which best describes your use?

[Of those who have used Gen AI]



Just over a third (36%) of generative AI users use it once a week or daily. This is equivalent to 13% of all people in the UK.

4% of all people in the UK claim to use generative AI daily (vs 3% in 2023).

Two in five (41%) of generative AI users are extremely infrequent users, at less often than once per month.

A quarter (26%) of Gen AI users only tried it once or twice – they may have experimented but seen little utility in the technology.

Weighted base: All respondents aged 16-75 years, 2024 (4150), who have used generative AI (1,473)

*Respondents given a range of Gen AI tools to choose from; including “Another”; **Those who were aware of generative AI, but did not know if they had used it were aggregated into “Aware of Gen AI, not used it”.

Source: Deloitte Digital Consumer Trends, UK, 2024

Low frequency users of Gen AI find the technology unhelpful and its answers unsatisfactory

41%

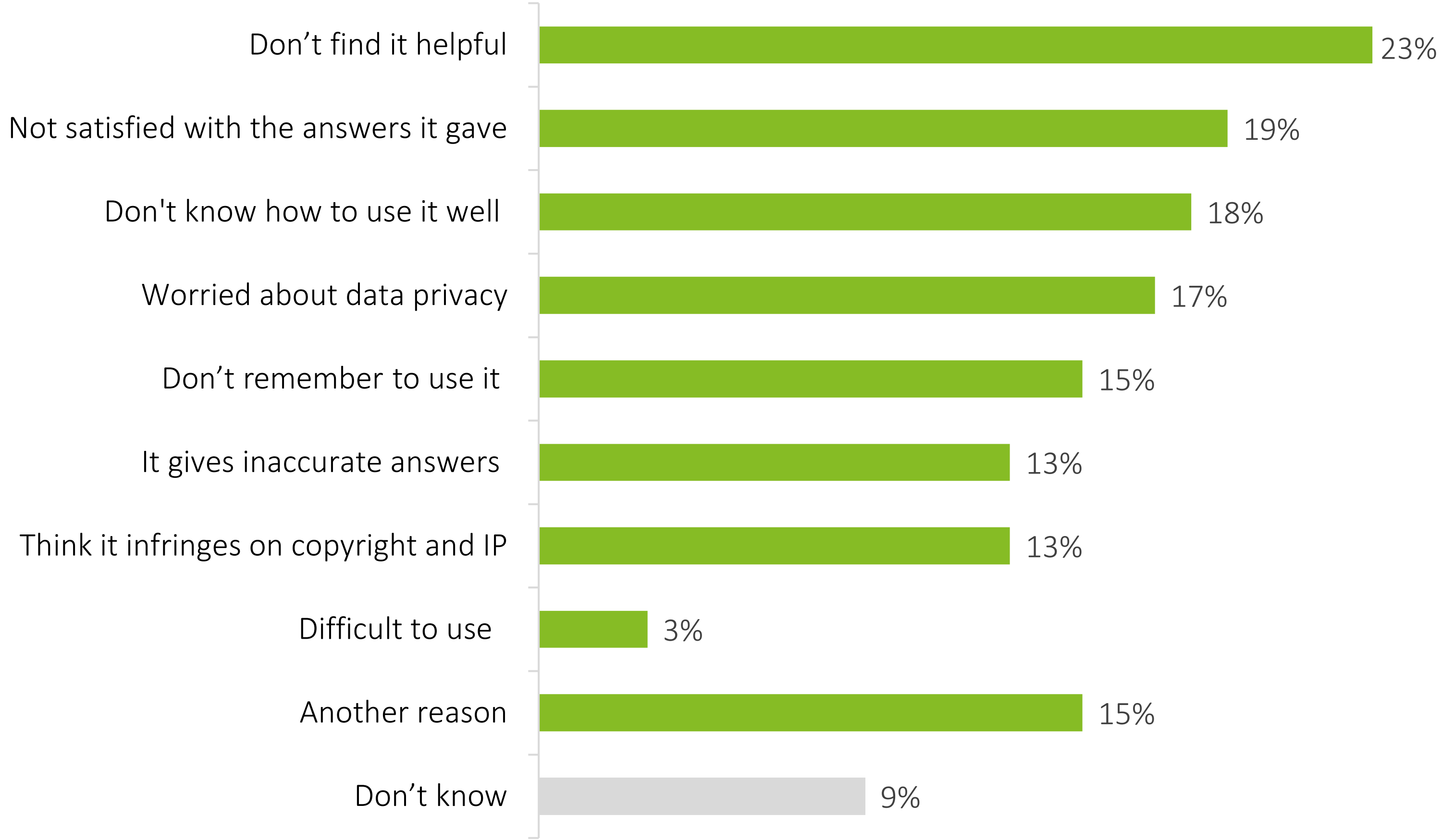
of Gen AI users now use it **less than monthly**.

Of those…

Low Frequency Users

Why don't you use Gen AI more frequently?

[Of those who use Gen AI less than monthly]



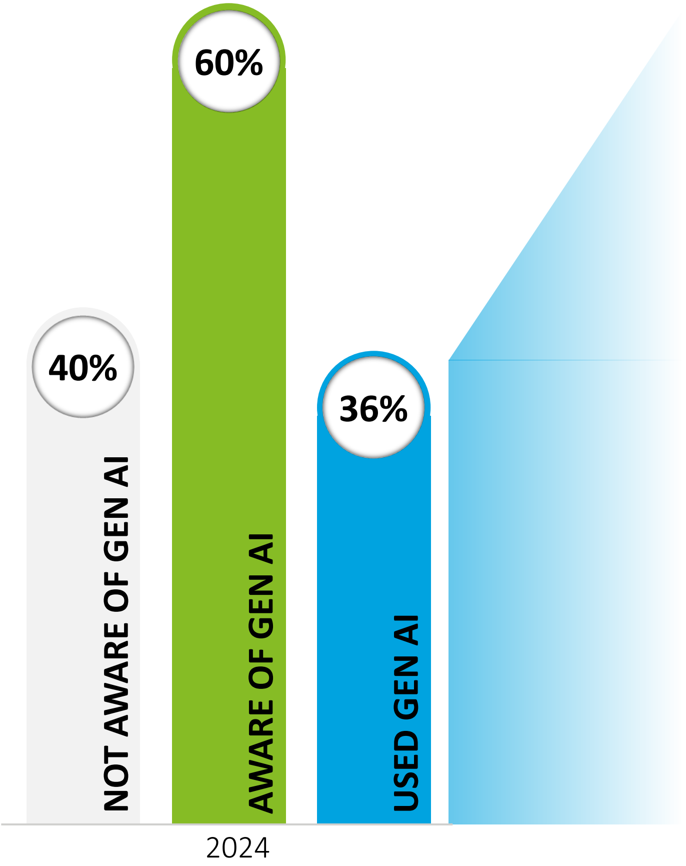
Weighted base: All respondents aged 16-75 years who have used generative AI (1,473), less frequently than monthly (613)

Source: Deloitte Digital Consumer Trends, UK, 2024

Seven million in UK have used Gen AI at work, up 66% from 2023; education use remains elevated

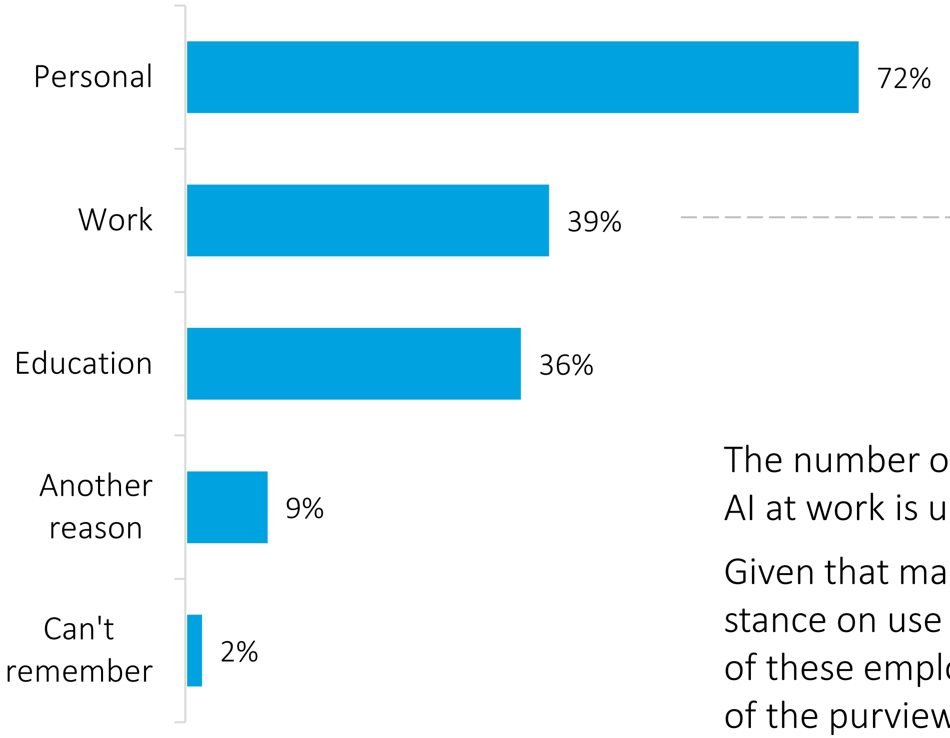
Generative AI

Which Generative AI tools have you heard of?*
Which Generative AI tools have you used?**



Users: Purpose of Use

Which of the following purposes have you used any Generative AI for?
[Of those who have used Gen AI]



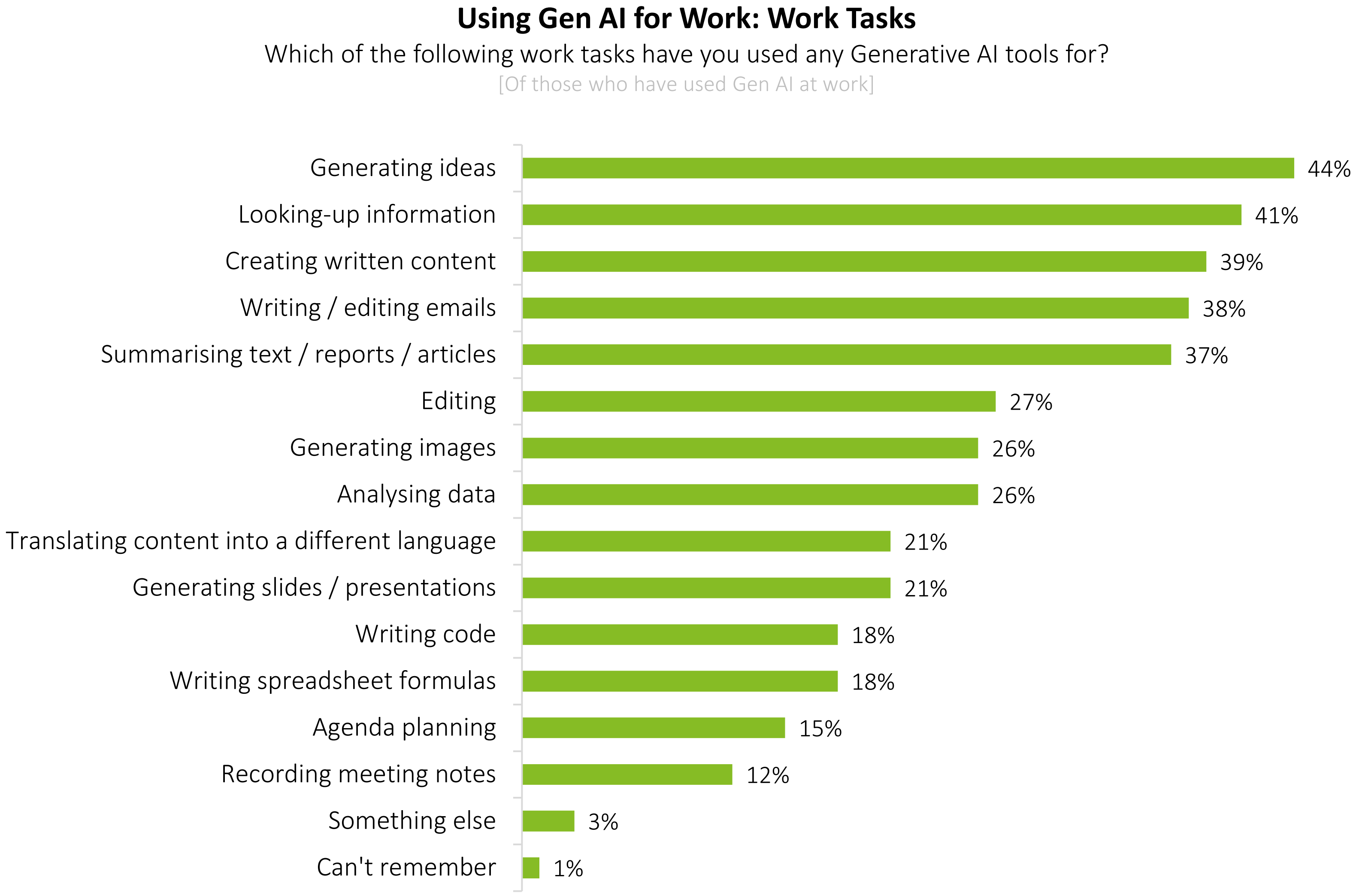
7 million
people in the UK have now used Gen AI at work
*vs **4 million** in May 2023*

The number of people who have used generative AI at work is up 66% year-on-year.

Given that many organisations still lack an official stance on use and/or a governance structure, many of these employees may have used Gen AI outside of the purview of their management.

Weighted base: All respondents aged 16-75 years, 2024 (4,150), who have used generative AI (1,473)
*Respondents given a range of Gen AI tools to choose from; including “Another”; **Those who were aware of generative AI, but did not know if they had used it were aggregated into “Aware of Gen AI, not used it”.
Source: Deloitte Digital Consumer Trends, UK, 2024

Generating ideas and searching are the most common applications of Gen AI at work



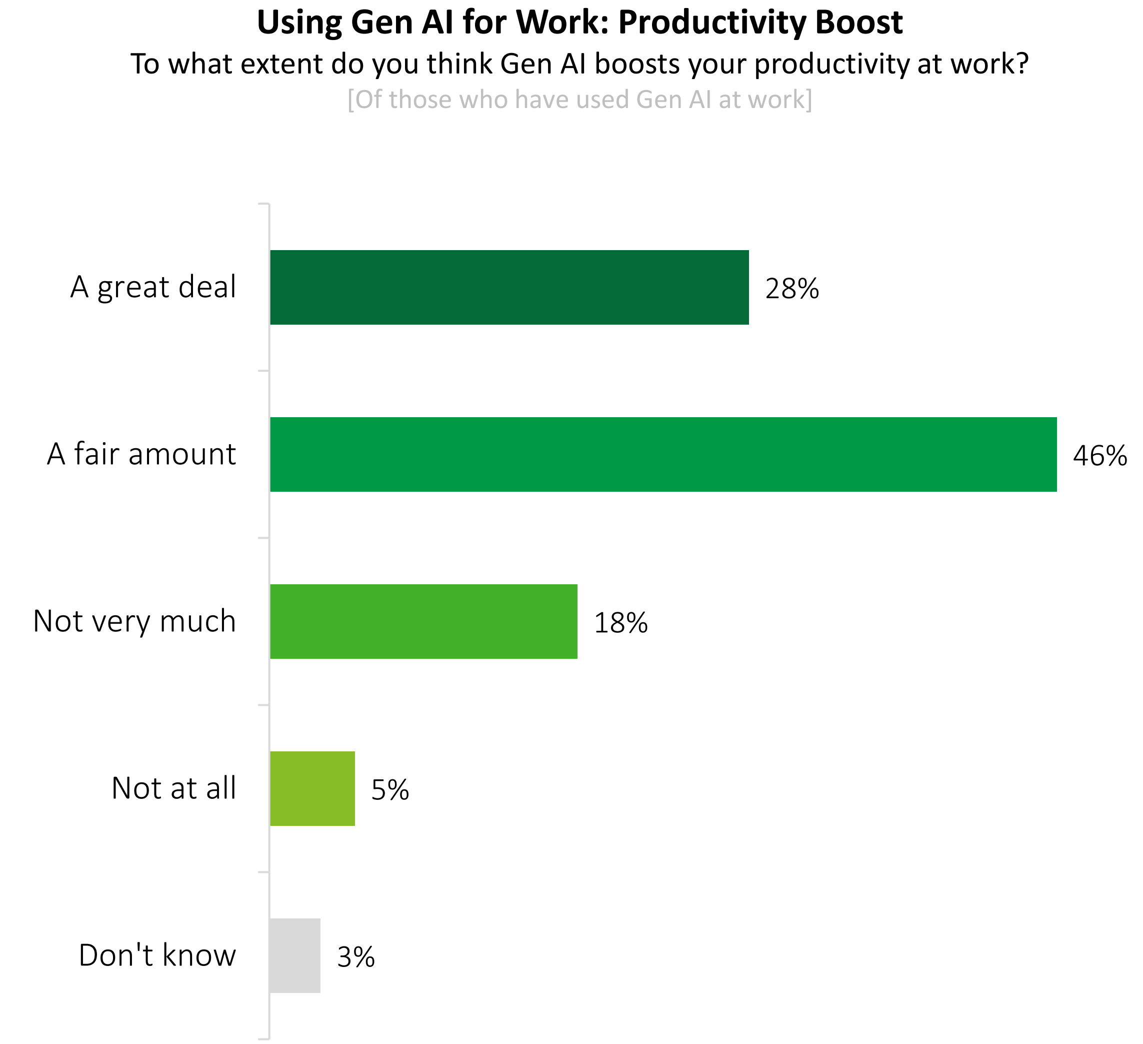
Employees may largely still be at experimentation stage with generative AI, whether they are using consumer-grade tools or if their employer now provides them with an official tool.

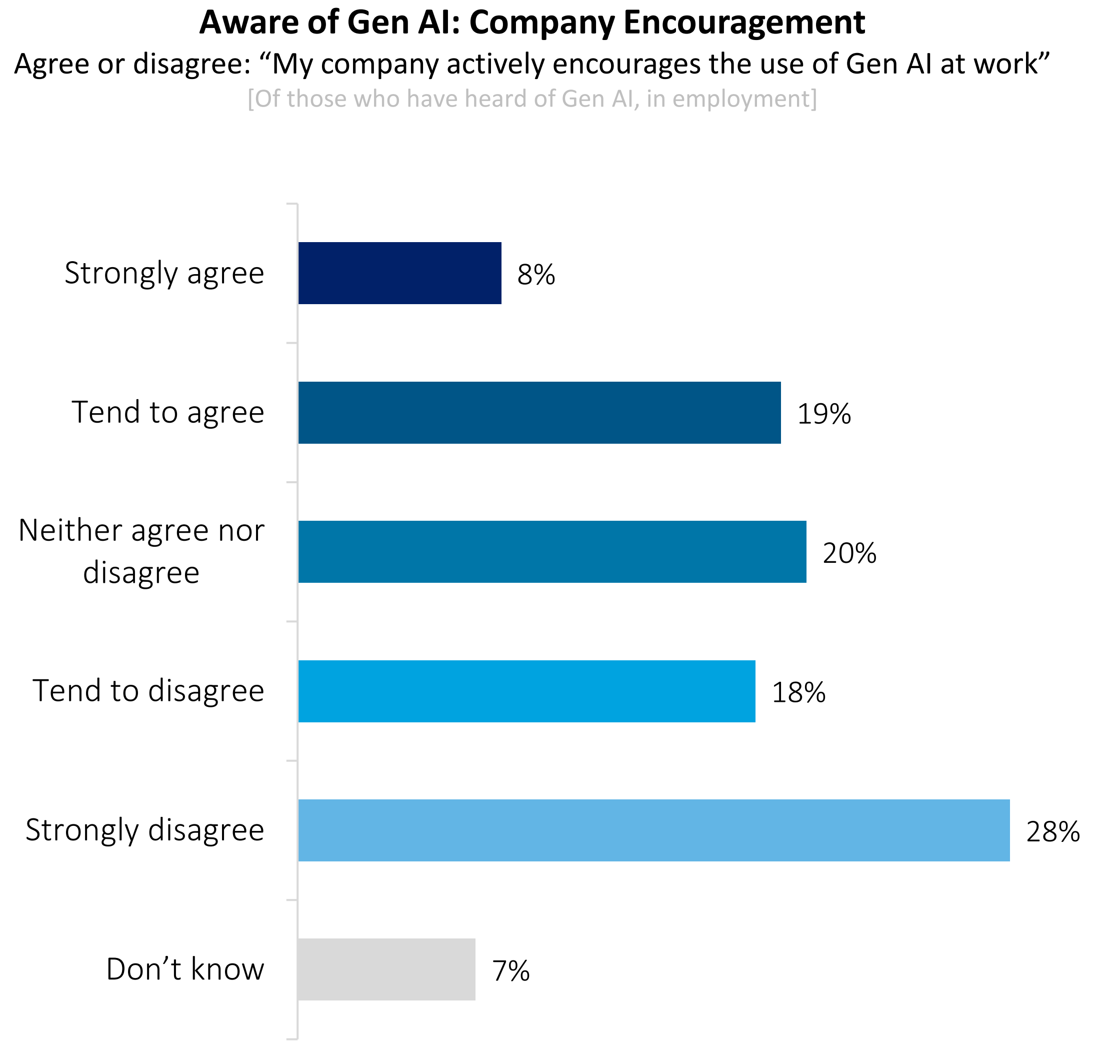
Two in five (41%) of those using Gen AI for work are "looking up information" using Gen AI. This is likely concerning given its propensity to 'hallucinate', which is a function of being a probability engine rather than a knowledge model.

18% of workers report using Gen AI are writing code. Given that less than 1% of people can code – clearly Gen AI use is popular with software engineers.

Weighted base: All respondents aged 16-75 years who have used generative AI for work, 2024 (571)
Source: Deloitte Digital Consumer Trends, UK, 2024

Majority using Gen AI at work claim productivity boost; most users' employers still do not encourage use





Weighted base: All respondents aged 16-75 years who have used generative AI for work, 2024 (571), employed adults who are aware of generative AI (1,575)
Source: Deloitte Digital Consumer Trends, UK, 2024

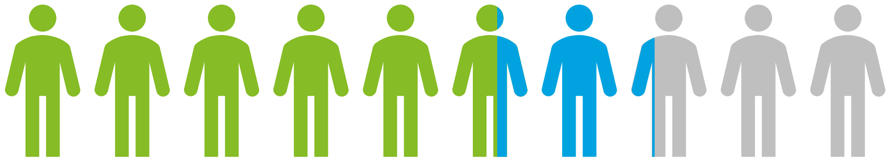
Respondents are wary of AI-created e-mails and chatbots

One application of Gen AI might be to create bespoke customer service chatbots, trained on data and transcripts from previous interactions. Consumers are hesitant about the hypothetical usage of gen AI in such services, but it may be possible to overcome anticipated aversion to this new technology. Early deployments of Gen AI in customer service have been shown to increase satisfaction, but companies still need to be careful to control how their use of Gen AI use is perceived – that it is there to improve quality, not to reduce cost, and sensitive interactions should still be handled by humans.

*"I would be **less inclined to trust an email** if I knew it was created using Generative AI."*

59% agree
14% disagree
27% neither agree or disagree or don't know

*"I would be **less inclined to use customer services** if I knew I was conversing with a Generative AI assistant."*



56% agree
17% disagree
27% neither agree or disagree or don't know

Weighted base: All respondents aged 16-75 years, who are aware of generative AI, 2024 (2,476)
Source: Deloitte Digital Consumer Trends, UK, 2024

Consumers slightly more knowledgeable, but a number still unaware of 'hallucination' and bias

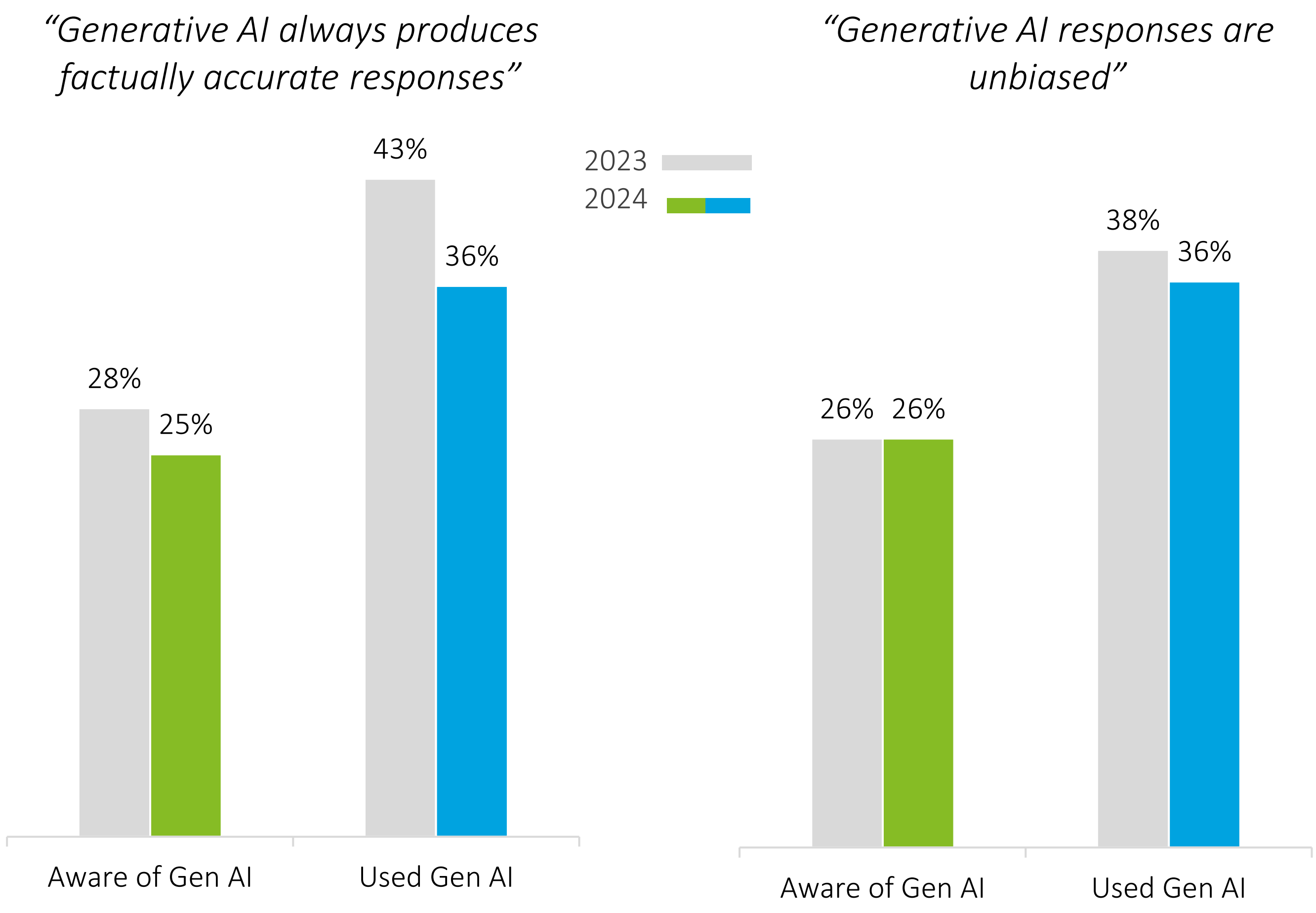
Generative AI can 'hallucinate', or in other words produce mistakes. It can also produce biased responses, which might be due to the type of data contained in its training set.

These may be inherent properties of how Gen AI works. Overcoming these issues with a technical solution may be challenging.

A subset of consumers remain underinformed about how generative AI works, and its drawbacks. While 25% of those who are aware of Gen AI think it is always correct, an even greater 36% of users think it is always correct.

Given that 7 million people in the UK are using Gen AI at work, a robust governance structure and employee training are important to mitigate these risks.

*Those who **agree** that…*



Weighted base: All respondents aged 16-75 years, 2023/2024 (4,150/4,150), who are aware of any Generative AI tool (2,178/2,476), who have used any Generative AI tool (1,096/1,473)
Source: Deloitte Digital Consumer Trends, UK, 2024

DEVICES

Devices reach natural plateau at different levels; no new form factors have emerged

In 2024, smartphone (94%) and smart TV (72%) were the only device categories to reach all-time high adoption rates.

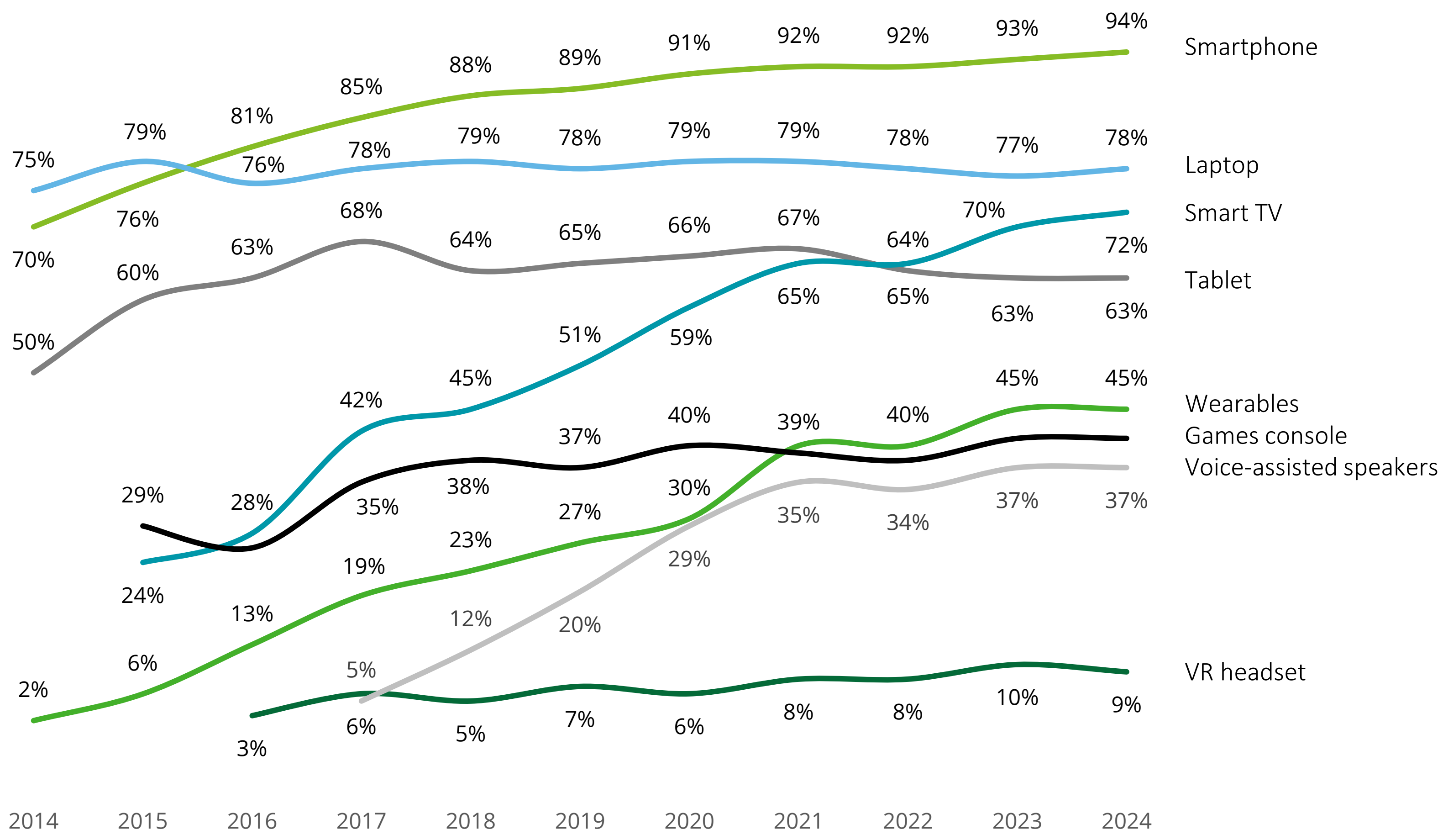
Devices tend to plateau at different levels, depending on their utility to the market.

Most major consumer electronic categories have reached, or are approaching, their plateau.

Attempts at new form factors, such as compact AI devices, may struggle to challenge existing, incumbent devices.

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), 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2014-2024

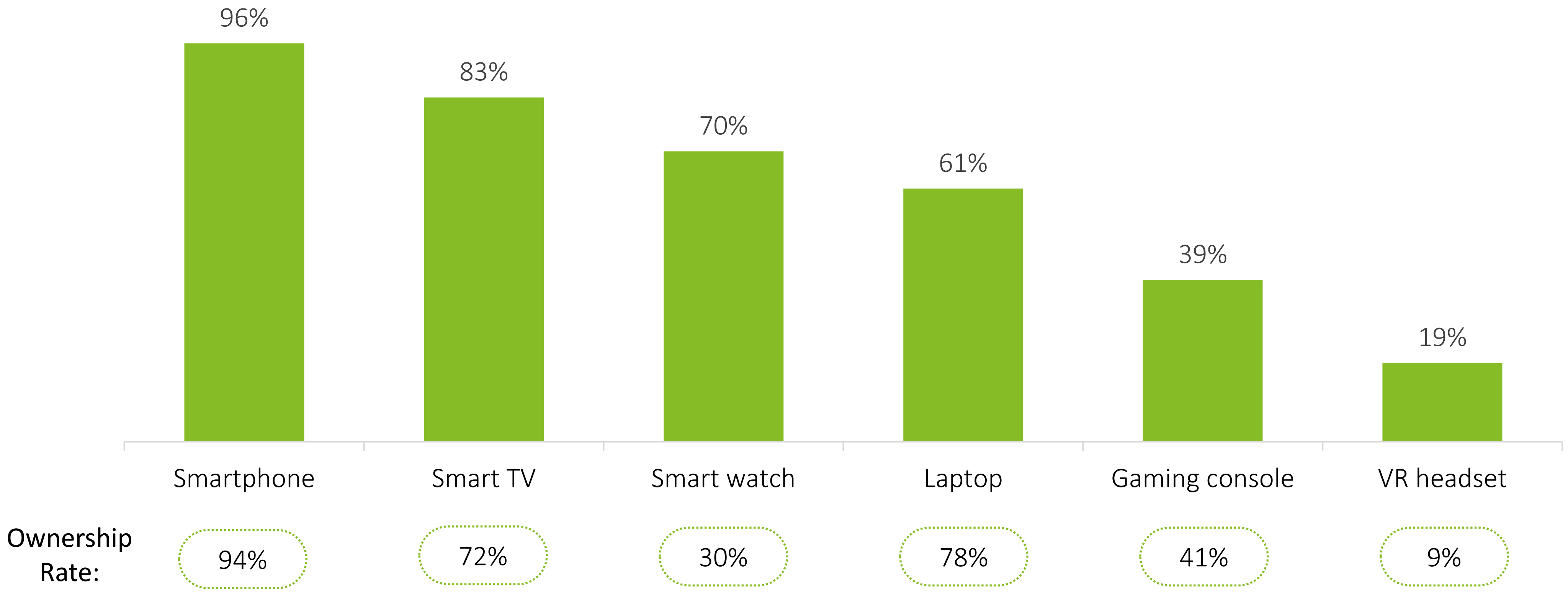
There are substantial differences in device usage rates, and device utility

Claimed usage of devices in the last day varies from 96% for smartphones to 19% for VR headsets. Smartphones are multi-functional and portable and are often used for several hours per day.

Devices: Daily Usage

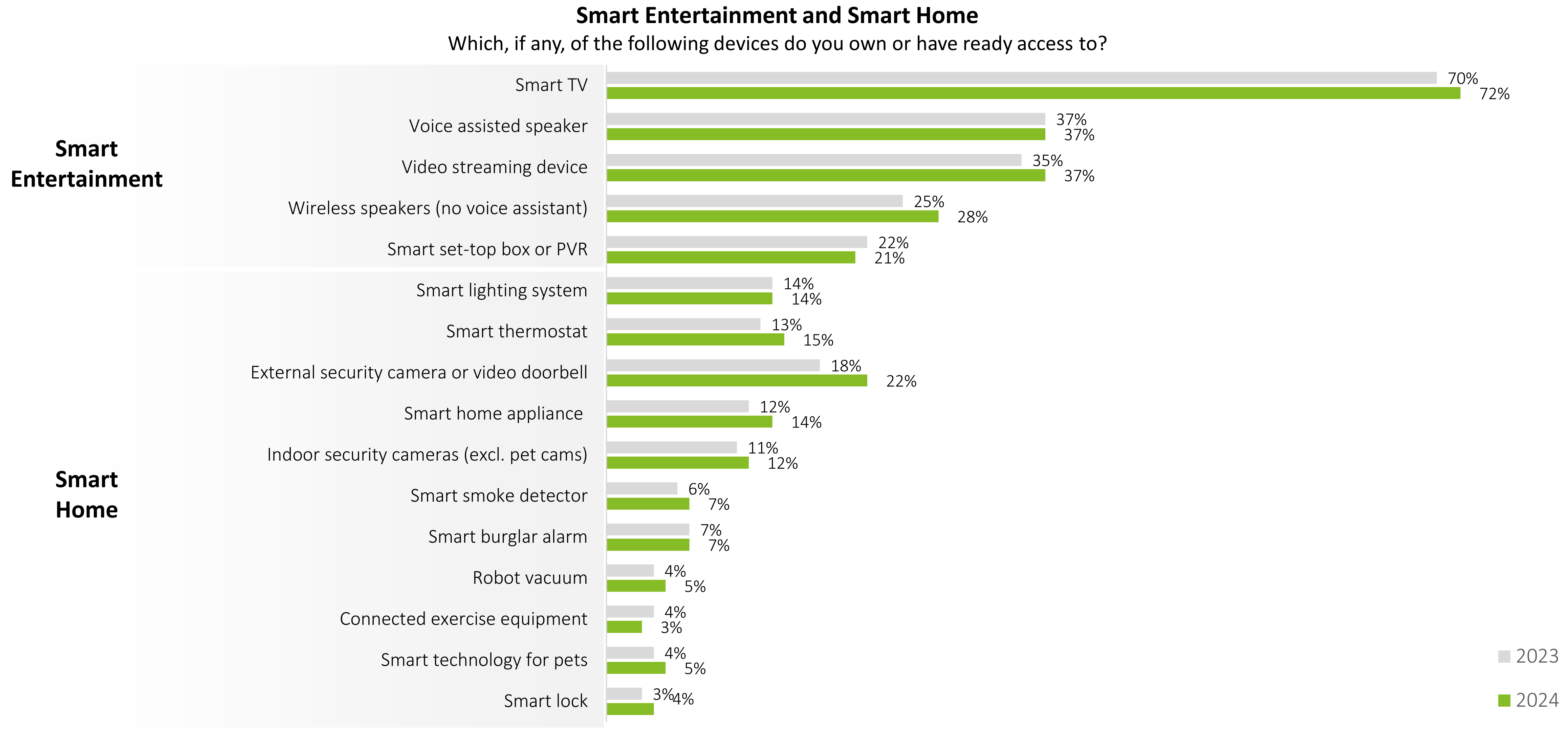
When was the last time you used this device? [In the last day]

[Of those who have each device]



Weighted base: All respondents aged 16-75 years, 2024, with a smartphone (3,914), laptop (3,226), smart watch (1,231), smart TV (2,991), games console (1,712), VR headset (383)
Source: Deloitte Digital Consumer Trends, UK, 2024

Smart home continues to grow slowly; and it's no longer because of affordability, so it's likely down to perceived utility



Weighted base: All respondents aged 16-75 years, 2023 (4,150), 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

One in three consumers (33%) do not plan to make a device purchase in the next year

Devices: Planned Purchases

Which, if any, of the following devices do you intend to purchase in the next 12 months?

Consumers plan to purchase…

25% Smartphone	**11%** Tablet	**15%** Laptop	**6%** Desktop
13% Smart watch	**9%** Fitness band	**16%** Smart TV	**11%** Wireless headphones
5% Portable games player	**11%** Games console	**6%** VR headset	**6%** Voice-assisted speaker

33%

of consumers <u>do not</u> plan to purchase a device in the next 12 months

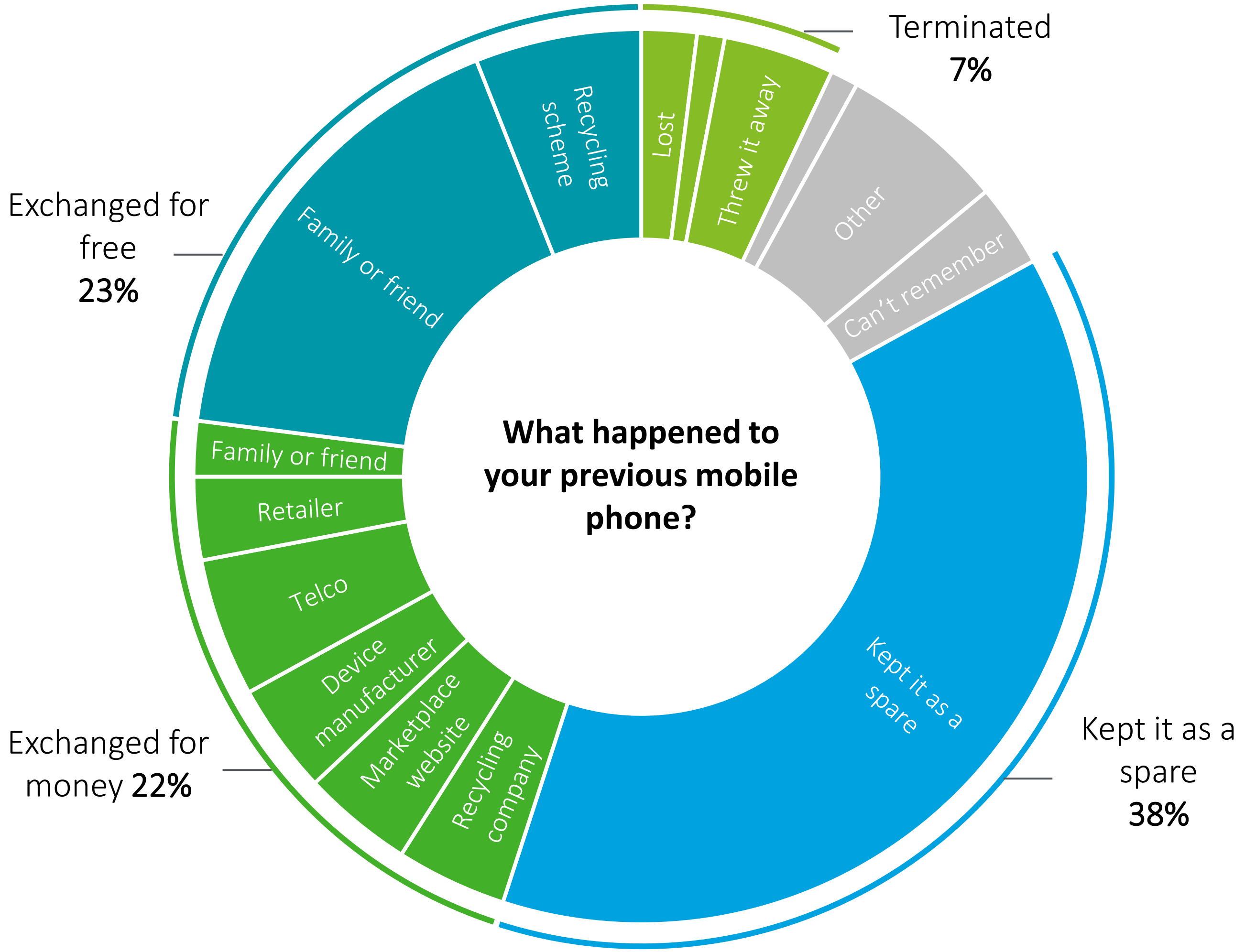
There are no brand-new device categories, and many incumbent categories (such as smartphones) have become predictable replacement cycles for consumers.

Weighted base: All respondents aged 16-75 years, 2024, (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

More than a third of consumers (38%) still keep their old smartphone as a spare

Previous smartphone

What happened to your previous mobile phone when you bought or received your current phone?



The best outcome for the environment is that mobile phones stay in use for as long as possible. One way to extend the lifecycle of a device is to sell, trade or exchange it (essentially, releasing it back into the open market).

However, 38% of consumers still claim to have kept their previous phone as a spare. This has not changed since the last time this question was asked in 2022.

Consumers are keeping their old phone for two main reasons: in case their new one breaks, and to protect valuable data on the old device. Both of these reasons can be solved by the industry (e.g. device insurance and cloud storage), so steps should be taken to help consumers release these old devices back into the market.

Weighted base: All respondents aged 16-75 years, who have a phone or smartphone, 2024 (4,013)
Note: Segments missing labels: Stolen (Green), Returned to Employer (Grey)
Source: Deloitte Digital Consumer Trends, UK, 2024

One in three consumers uses a second-hand device

Devices: Second-Hand Ownership

Which, if any, of the following devices that you currently use were previously owned by someone else?

Consumers have second-hand…

16% Smartphone

8% Tablet

12% Laptop

6% Desktop

4% Portable games player

9% Games console

9% Smart TV

3% VR headset

7% Smart watch

3% eReader

38%

of consumers have at least one second-hand or refurbished device

Consumers use second-hand products for a variety of reasons, but primarily it is due to convenience (say a friend of family member has one spare), and most importantly, cost.

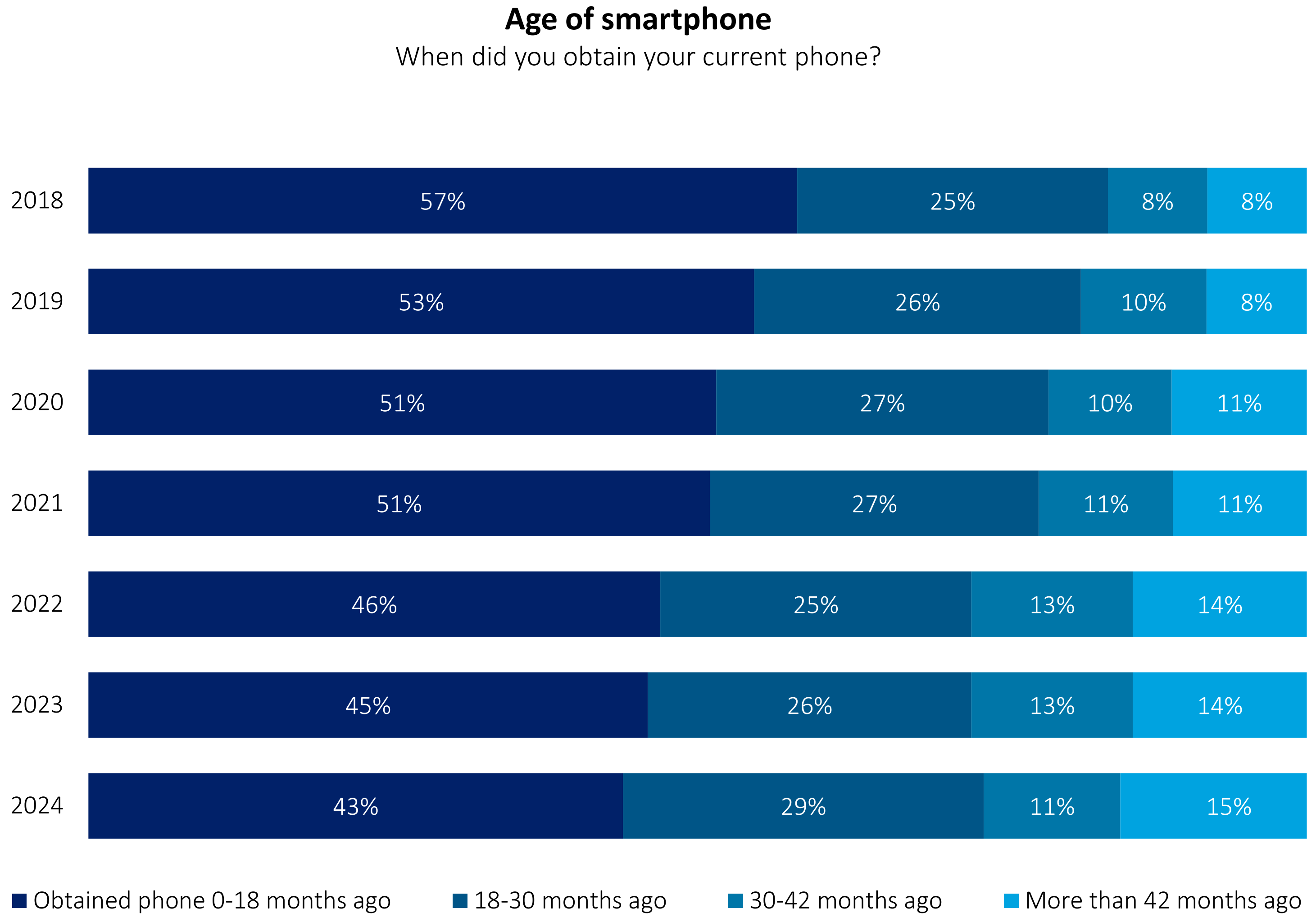
Second-hand smartphone ownership has increased only slightly from 2023, when it was 15%.

Weighted base: All respondents aged 16-75 years, who have used the devices they own or have access to, 2024 (4,131)
Source: Deloitte Digital Consumer Trends, UK, 2024

Smartphones in our pockets are getting steadily older, with every year

In 2024, over half (55%) smartphones are at least 18 months old. Given that smartphone hardware improvements are iterative, and software developers create apps which run fine on older devices, many consumers are comfortable keeping their smartphone for longer.

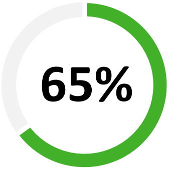
In fact, many consumers use the length of ownership as justification for paying more for a premium or flagship device at the point of purchase.



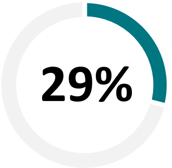
Weighted base: All respondents aged 16-75 years, who have a phone or smartphone, 2018 (3,939); 2019 (3,952); (half sample - sample A) 2020 (1,985); 2021 (1,992); 2022 (2,000); 2023 (2,024); 2024 (2,003)
Note: Respondents who "Don't Know" not shown
Source: Deloitte Digital Consumer Trends, UK, 2018-2024

Consumers struggle to comprehend carbon footprint

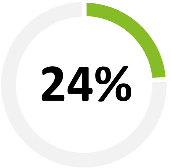
Sustainability fatigue may be setting in amongst consumers. Life can be complex, and tracking personal emissions is challenging. Consumers may feel unequipped to properly accredit the companies and brands they buy from, and while they may wish to make eco-conscious decisions, they have few methods to validate them. Consumers tend not to trust companies are genuine in their ESG ambitions.



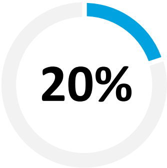
feel companies often overstate their "green" image



trust that tech companies are transparent when declaring their carbon footprint



have regular conversations with family and friends about carbon footprint



have some idea what their carbon footprint is

Weighted base: All respondents aged 16-75 years, 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

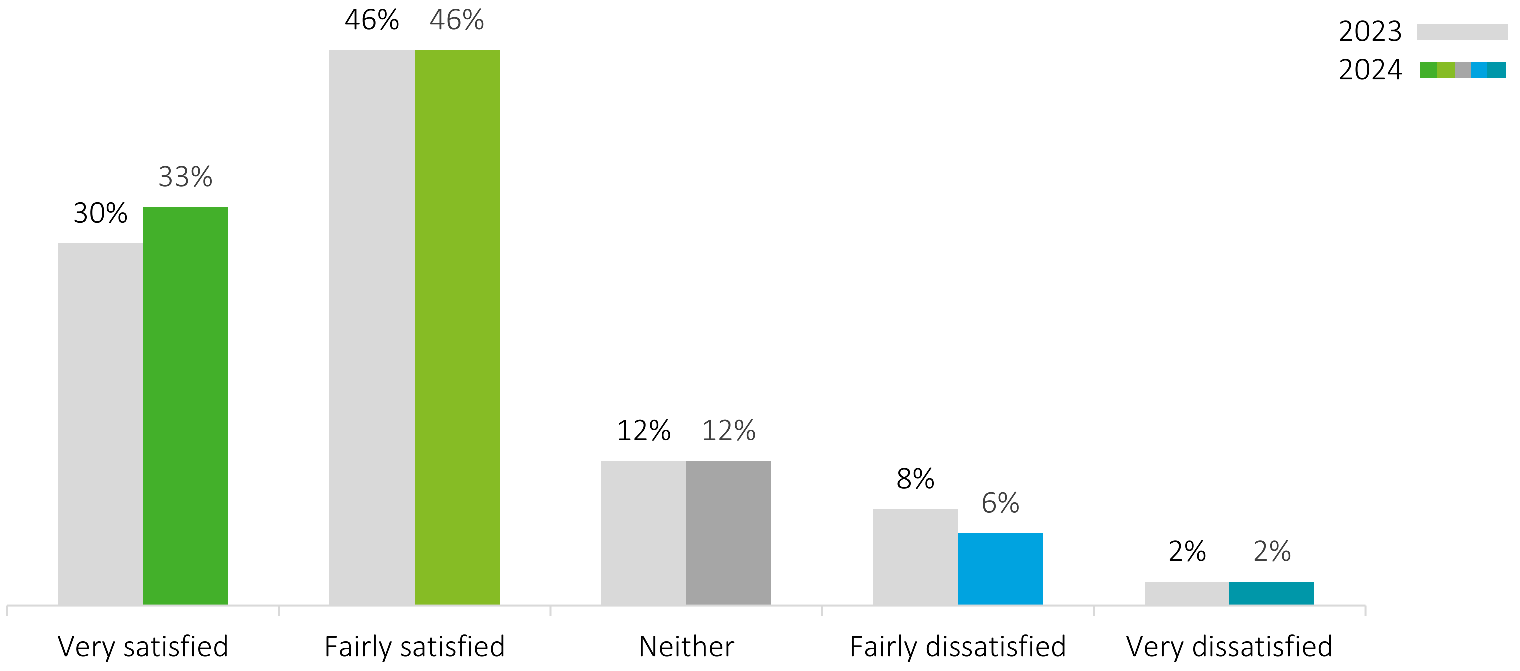
NETWORKS

Broadband satisfaction levels continue to nudge upwards

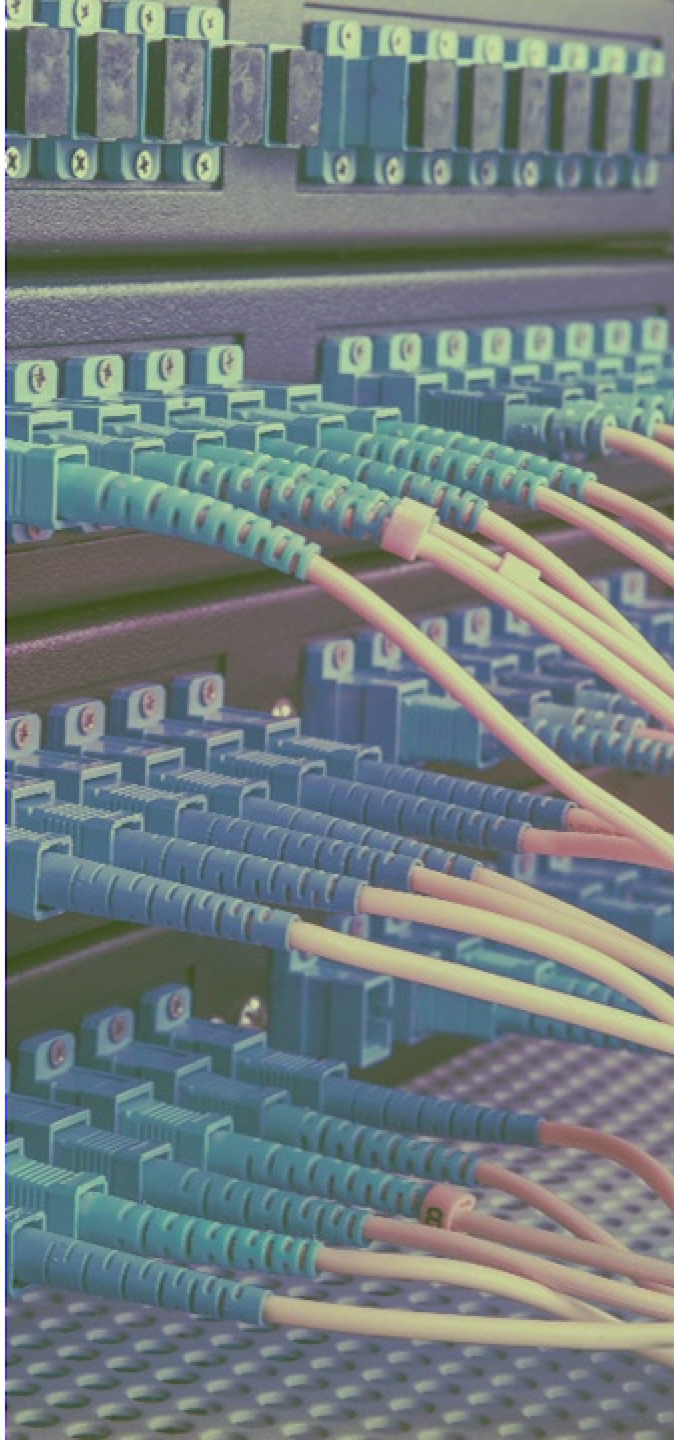
Four in five (79%) are now at least "fairly" satisfied with their broadband, regardless of underlying technology: fibre to the home (FTTH), or fibre to the cabinet (FTTC), or cable broadband. For most broadband users, the applications they predominantly use - video streaming, social media, online gaming, and work tasks like video calls and file upload/download - are well-served by their broadband network they have. Most mainstream online applications are optimised for 5 Mbit/s or lower.

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), 2024 (3,732)
Source: Deloitte Digital Consumer Trends, UK, 2024



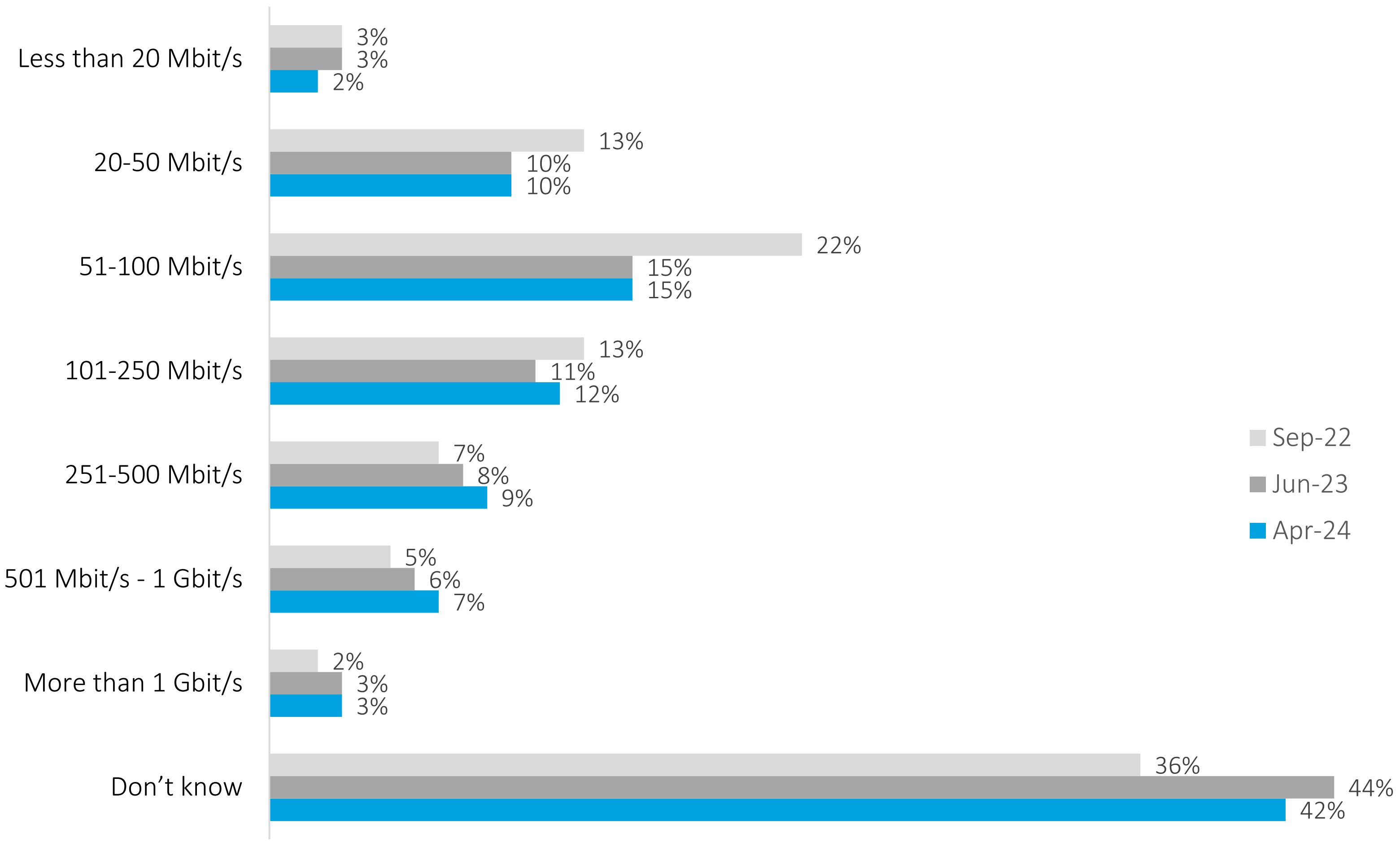
Speed may be solved for households; reliability and in-home coverage may become the differentiator

Two in five (42%) do not know what their home broadband speed is, possibly because speed is not an issue.

Household size is declining across much of Europe and including the UK, with single- and dual-occupancy homes increasingly common.

Broadband Speeds

How fast is the home internet connection you currently have?

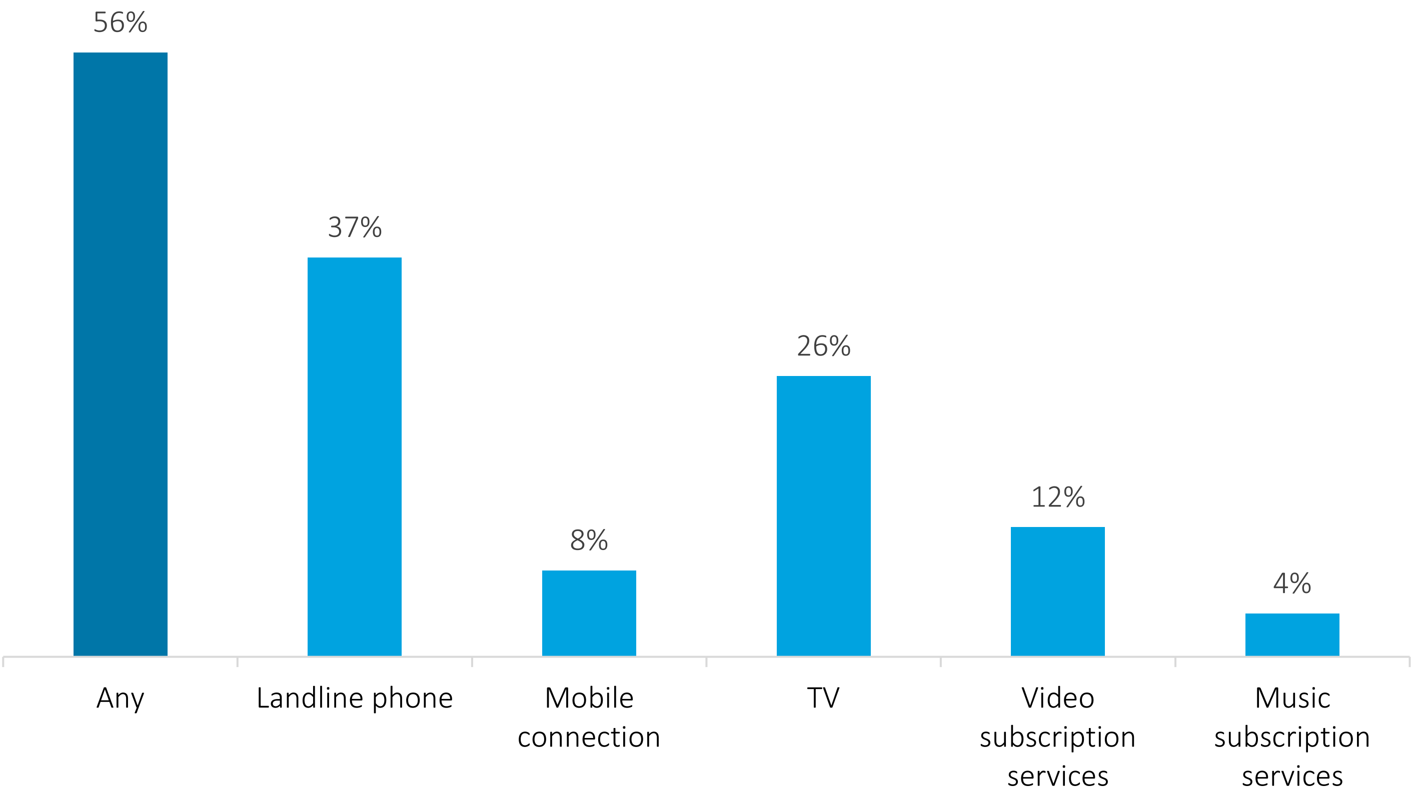


Weighted base: All respondents aged 16-75 years, with a fixed home broadband connection, 2022 (1,978), who have internet access at home, 2023 (4,111), 2024 (3,732)
Source: Deloitte Project Fibre, 2022, Digital Consumer Trends, UK, 2023-2024

More than half (56%) of households buy broadband bundled with other services

Bundles

Is your broadband service at home bundled with any of the following?



Bundles are common in the UK, as customers look for discounts in bringing together broadband with telephony and media services.

For the consumer, other major benefits of this are convenience – with one bill to pay – and also simplicity, with one company to call if a particular application does not work on a home network.

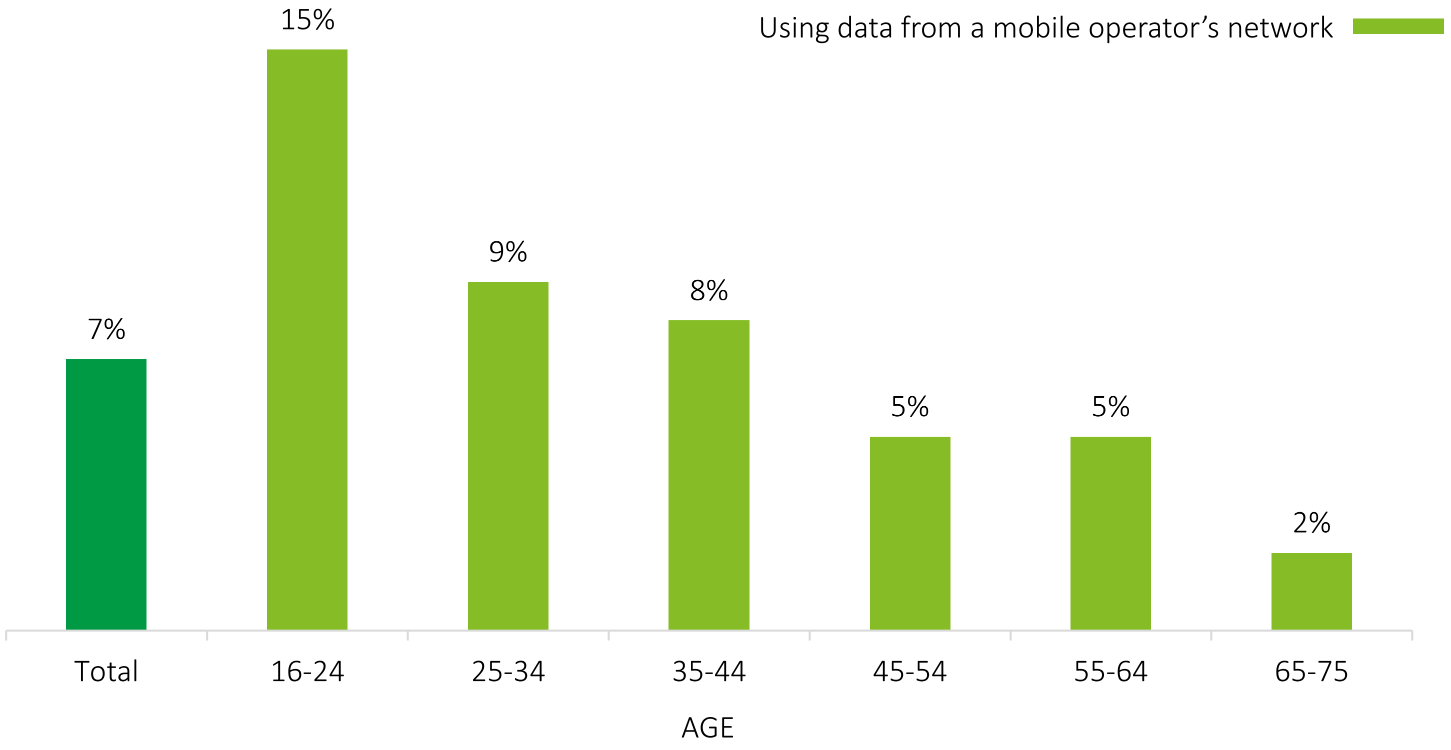
Landlines remain popular – particularly among 55–65-year-olds (49%) and 65–75-year-olds (56%), who may be taking inbound calls from friends and relatives in older age groups.

Weighted base: All respondents aged 16-75 years, who have home broadband, 2024 (3346)
Source: Deloitte Digital Consumer Trends, UK, 2024

Younger groups lean on mobile connections for flexibility and price

Mobile as a Primary Connection

Which, if any, of the following types of internet or home broadband connection is the MAIN one you use in your household? [Using data from a mobile operator's network]



One in six people between 16-24 (15%) claim that their primary household connection is data from a mobile operator's network.

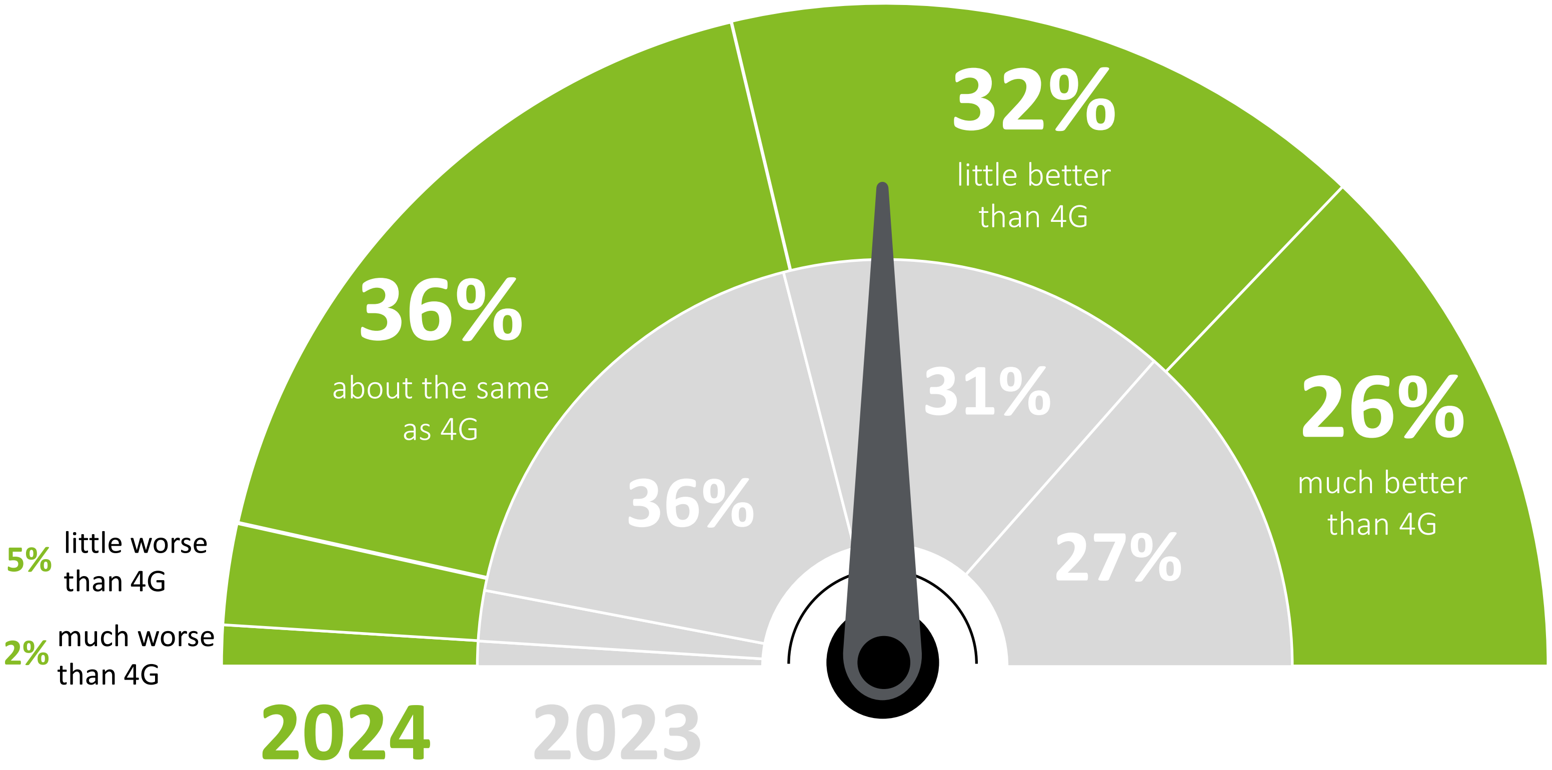
For young people on lower salaries, who are more likely to be in rented accommodation, and more likely to move often, forms of fixed wireless access (FWA), including informal FWA which might be tethering from a smartphone, may provide a compelling alternative to a potentially expensive and inflexible fixed broadband product.

Weighted base: All respondents aged 16-75 years, 2024 (4150)
Source: Deloitte Digital Consumer Trends, UK, 2024

Perception of 5G has not changed; only a slight majority can tell the difference

4G vs 5G

Since using a 5G network on your phone, how has your overall experience of mobile internet been?*



It is five years since the first 5G networks launched in the UK. Over that time roll out of 5G base stations, and the availability of 5G smartphones has expanded.

However, perception of 5G as a superior technology relative to 4G has barely changed in the last 12-months.

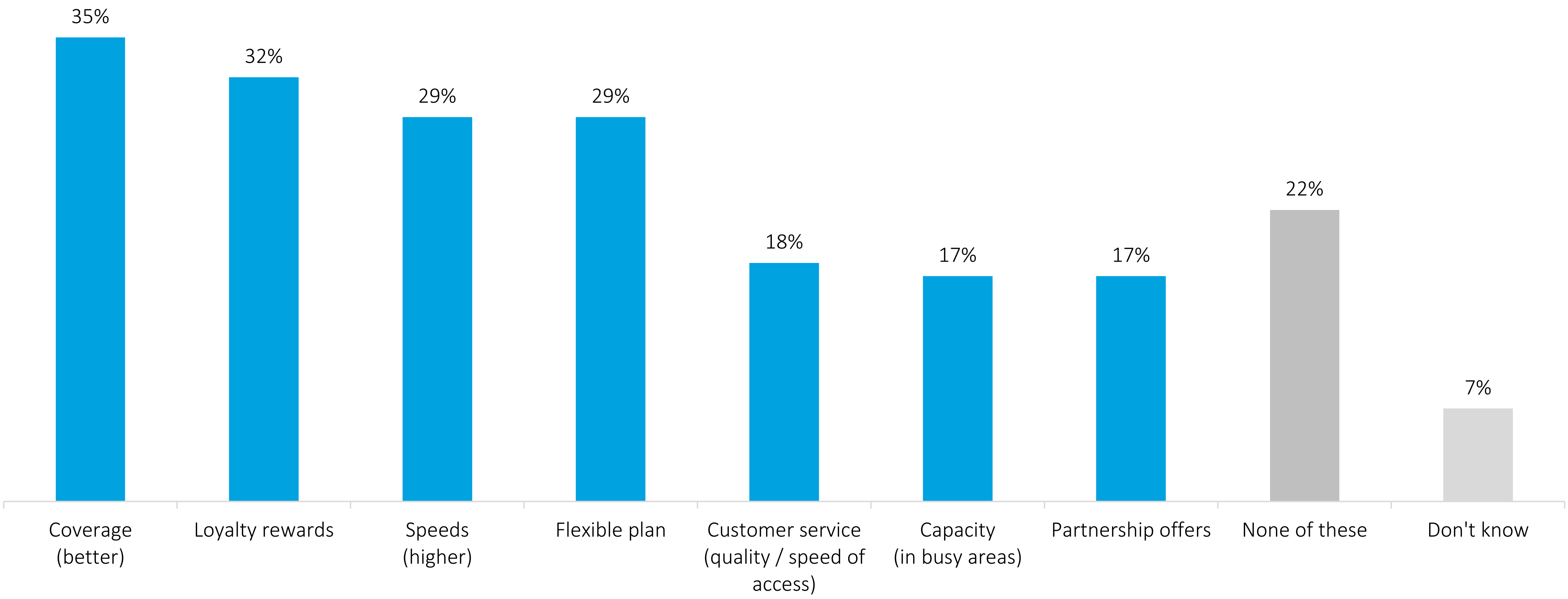
A slight majority (58%) consider 5G to be better than 4G, but a significant number of users see little difference. This may be why few consumers have been willing to pay a premium for 5G.

Weighted base: All respondents aged 16-75 years who currently have 5G on their main phone, 2023 (1,601), 2024 (1,976)
*Rebased to exclude those who have only ever used 5G, and those who Don't Know
Source: Deloitte Digital Consumer Trends, UK, 2024

Consumers value better coverage and loyalty rewards more than higher speeds

Churn factors

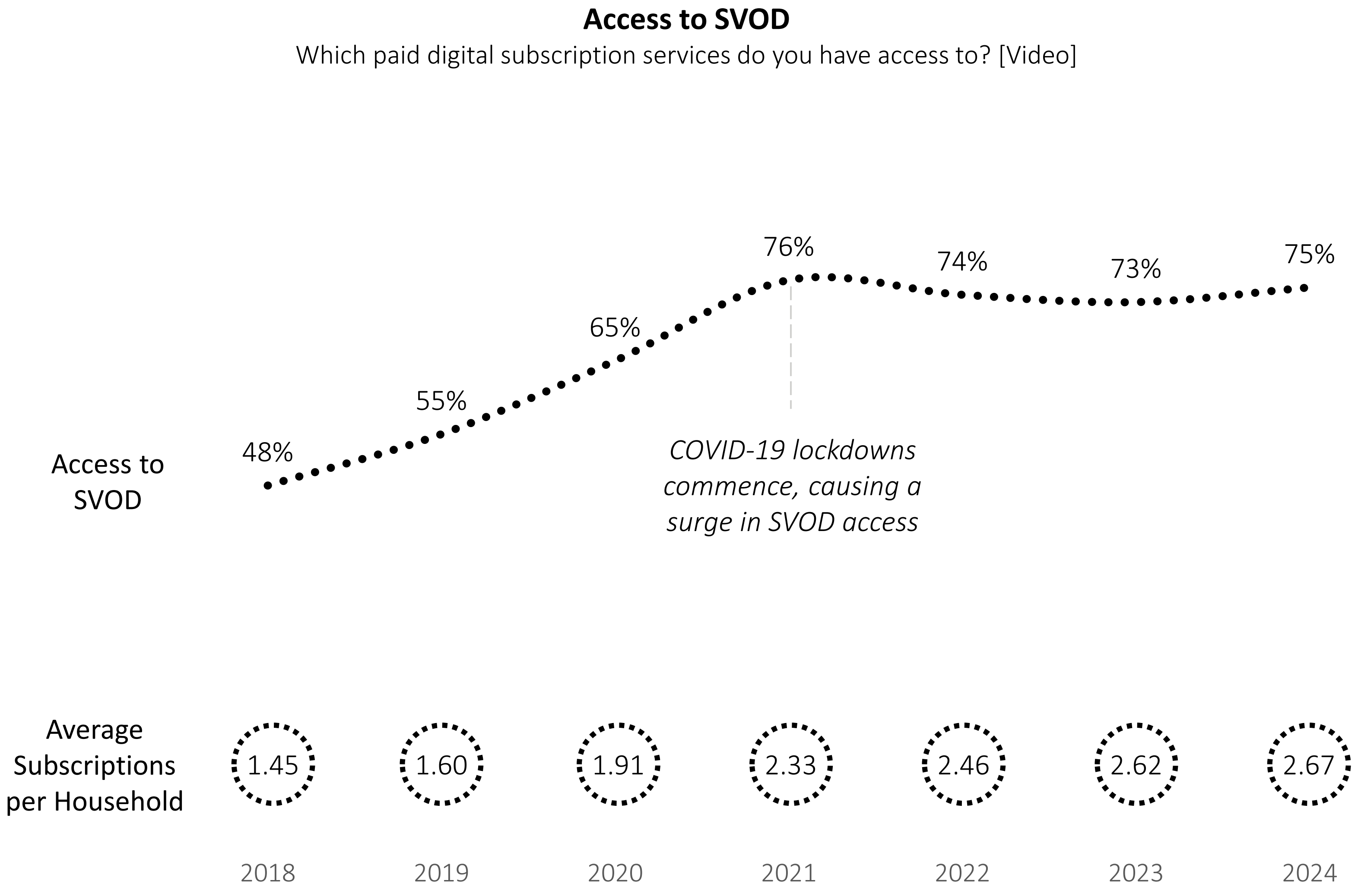
Which, if any, of the following would encourage you to switch mobile network provider?



Weighted base: All respondents aged 16-75 years, All adults 16-75 who have access to a phone or smartphone 2024 (4,013)
Source: Deloitte Digital Consumer Trends, UK, 2024


VIDEO

Subscription video on demand remains at four-year plateau; but subscriptions per household maintain

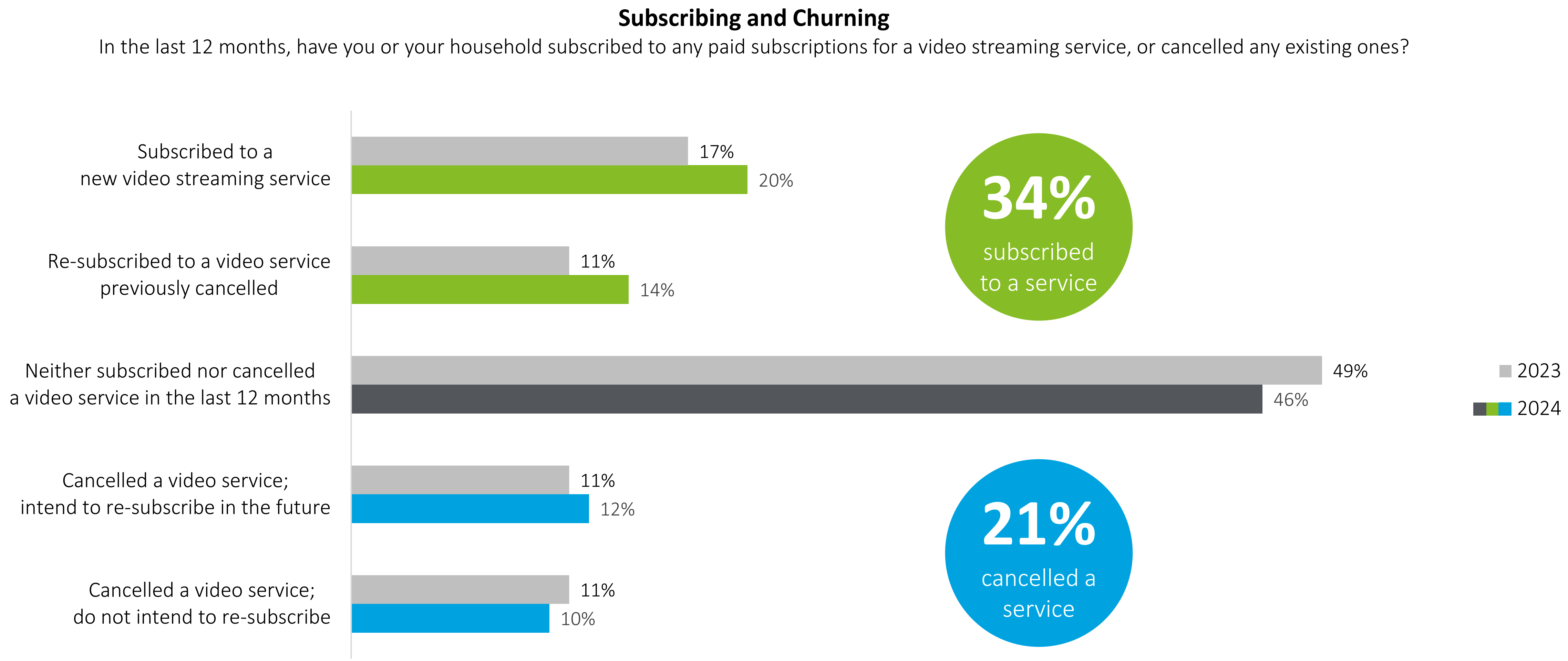


Subscription video on demand (SVOD) is now a staple of most UK households, but the final quarter of the market (25%) yet to purchase SVOD have proved difficult to convince. This group tends to be older and are satisfied with free-to-air content from PSBs.

Hence, SVOD platforms have focused on extracting more value from the three quarters (75%) of the market which already pays – with many now cracking down on password-sharing, and adding ad-funded tiers.

Weighted base: All respondents aged 16-75 years, 2018 (4,150), 2019 (4,150), 2020 (4,150), 2021 (4,160), 2022 (4,161) 2023 (4,150), 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2018-2024

Positive momentum in 2024: churn is static, and a fifth took on a brand-new subscription

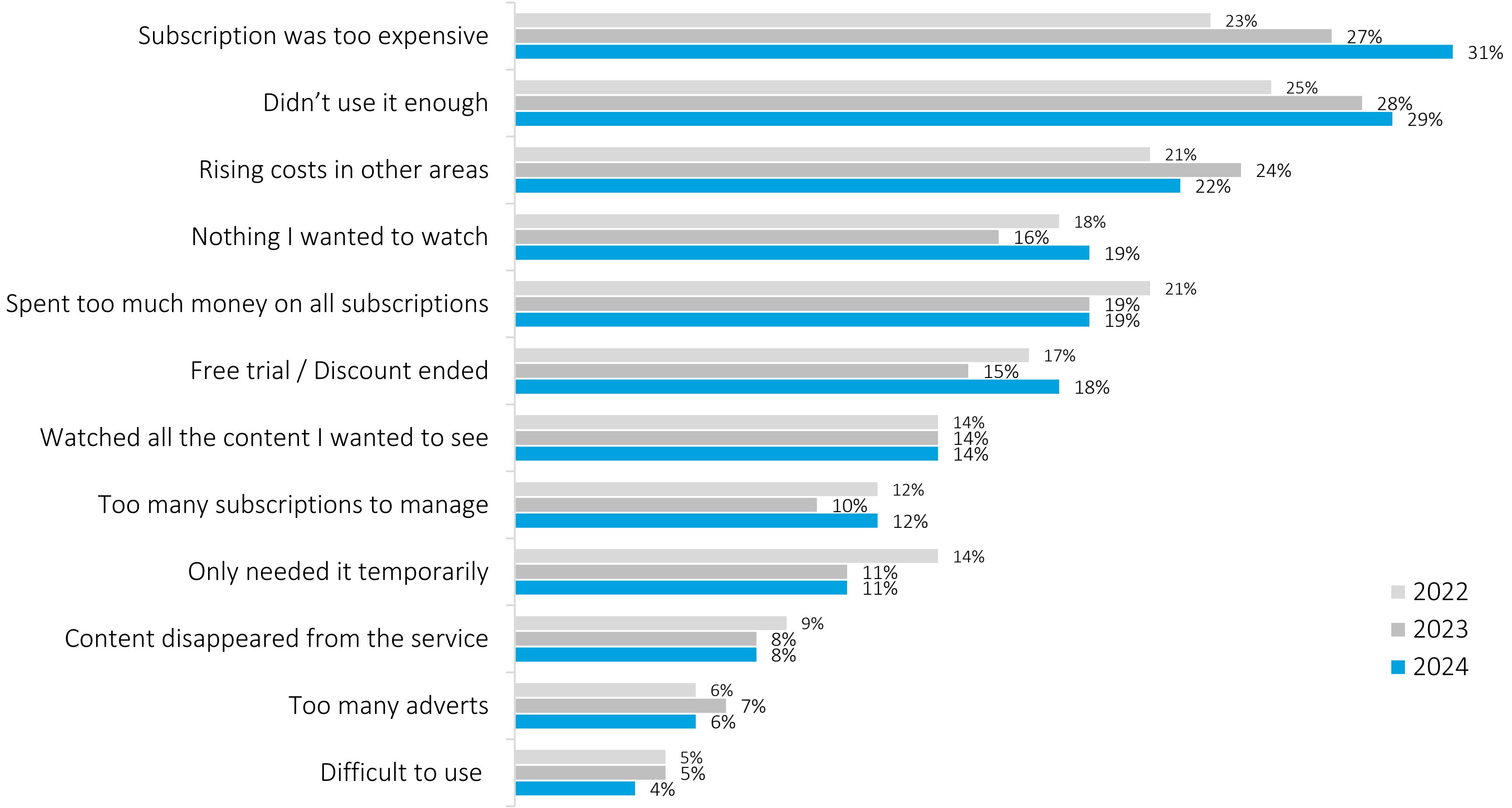


Weighted base: All respondents aged 16-75 years, 2021 (4.015), 2022 (4,011), 2023 (4,150), 2024 (4,150)
*Not shown are respondents who answered Can't Remember (8%)
Source: Deloitte Digital Consumer Trends, UK, 2021-2024

SVOD price increases likely contributing to churn

SVOD: Reasons for Cancelling

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



"Subscription was too expensive" moves to the top of the list of churn factors.

Some consumers may resent price increases – two of the three largest SVOD platforms raised prices in 2023.

Password sharing crackdowns may also be a factor here, as consumers may be faced with the prospect of funding a service alone, rather than as a group.

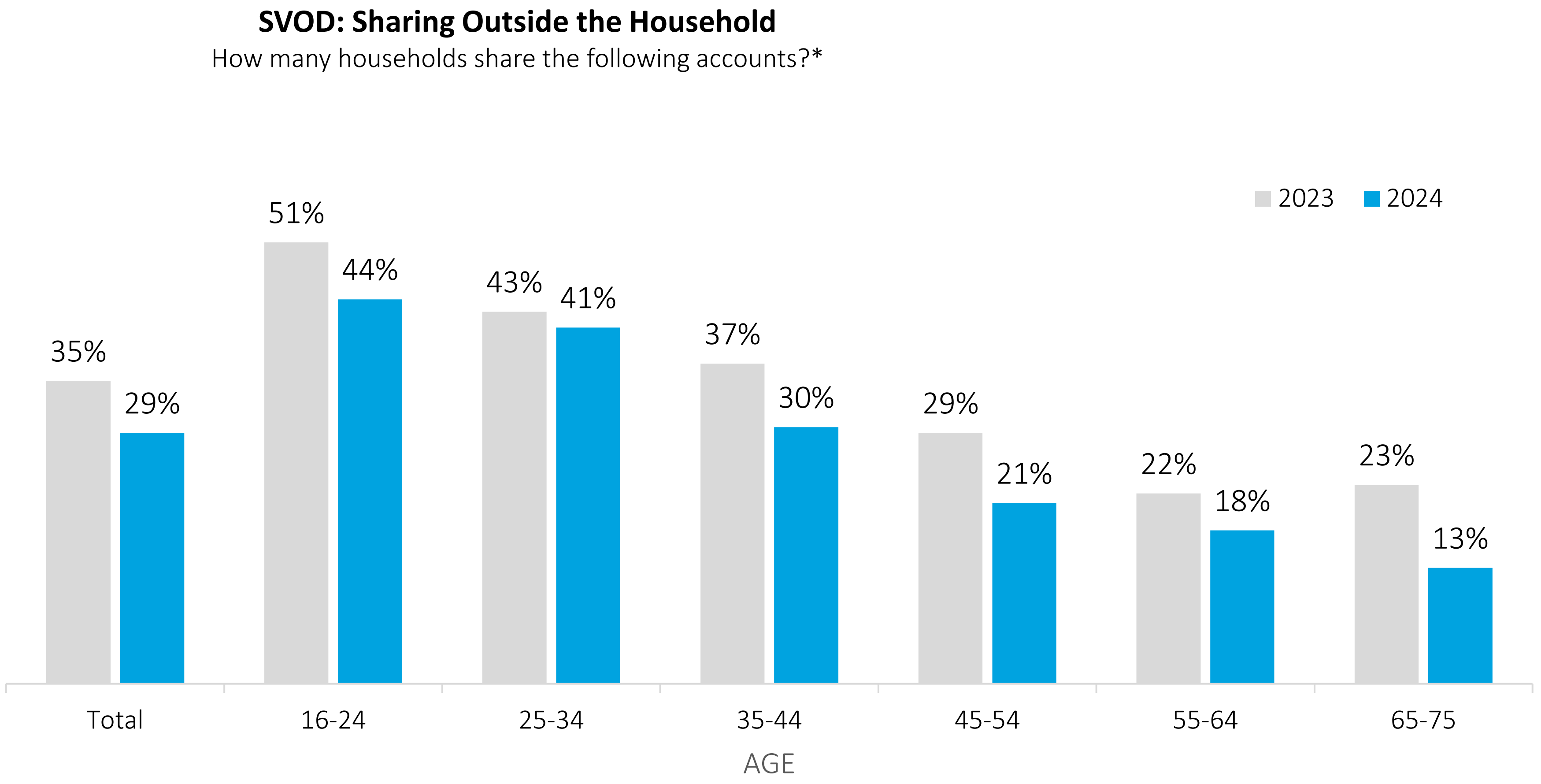
Weighted base: All respondents aged 16-75 years, who cancelled a paid video service in last 12 months, 2022 (1,005), 2023 (1,179), 2024 (1,290)
*Not shown are respondents who answered Don't Know (2%), Other (4%), Content inappropriate for children (3%)
Source: Deloitte Digital Consumer Trends, UK, 2022-2024

Sharing crackdowns appear to have reduced the extent of account sharing, with a 6-percentage point decline in sharing to 29% between 2023 and 2024

Streaming platforms have started to act to restrict sharing, using metrics like using IP address, device ID, and account activity to limit streaming to a single home location.

29%

of SVOD users share at least one service outside their household



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), 2024 (2,344/1,847/1,432)
*Asked of three major streaming services
Source: Deloitte Digital Consumer Trends, UK, 2024

One in five (22%) claim to be impacted by sharing crackdown

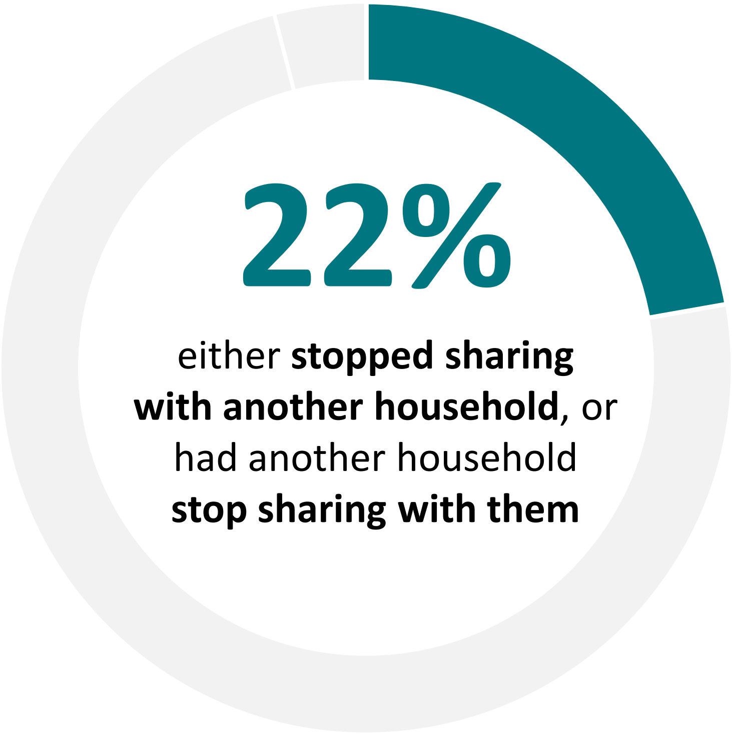
Over a fifth (22%) report that they have stopped sharing an SVOD account with another household as a result of a password-sharing crackdown.

However, this has not resulted in a discernible uplift in overall churn (21% in 2023 and 21% in 2024): it seems that the early SVOD platforms to crack down have been successful.

In other words, some households are no longer sharing, but continue to pay for/ are now paying for SVOD.

Sharing Crackdown

In the last 12 months, have you stopped sharing access to a video streaming service with another household because the provider ended free sharing?



Weighted base: All respondents aged 16-75 years, 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

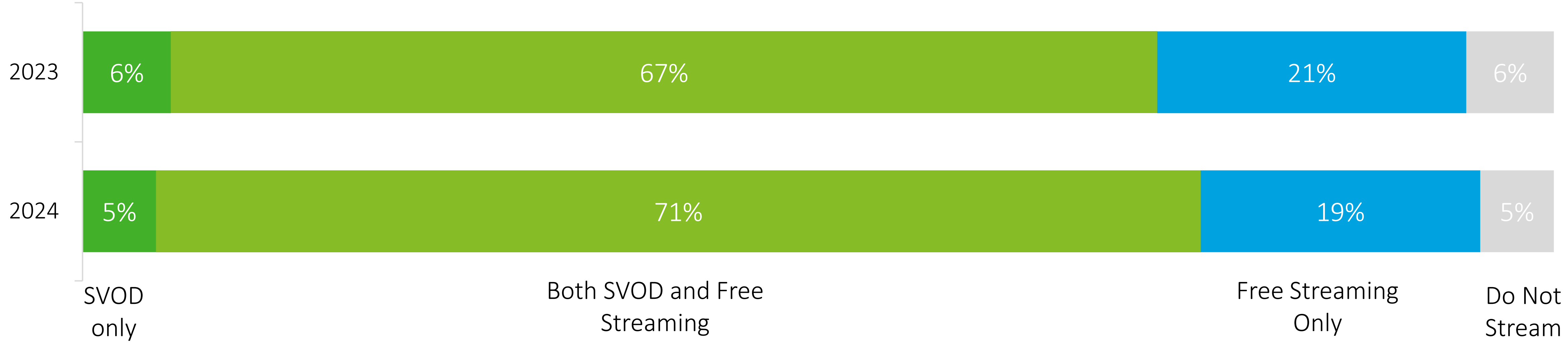
Almost everyone uses a free video streaming service

Nine in ten consumers (90%) use a free video streaming service. This includes broadcaster video on demand (BVOD) which can be ad-supported and license fee-supported, FAST (free ad-supported TV) channels, and online video platforms.

Public service broadcasters are attempting to diversify to be less dependent on traditional TV advertising, and to grow digital income streams. Content strategies are also evolving, with growing focus on cost, efficiency and potential viewership.

SVOD, Free Streaming, or Both

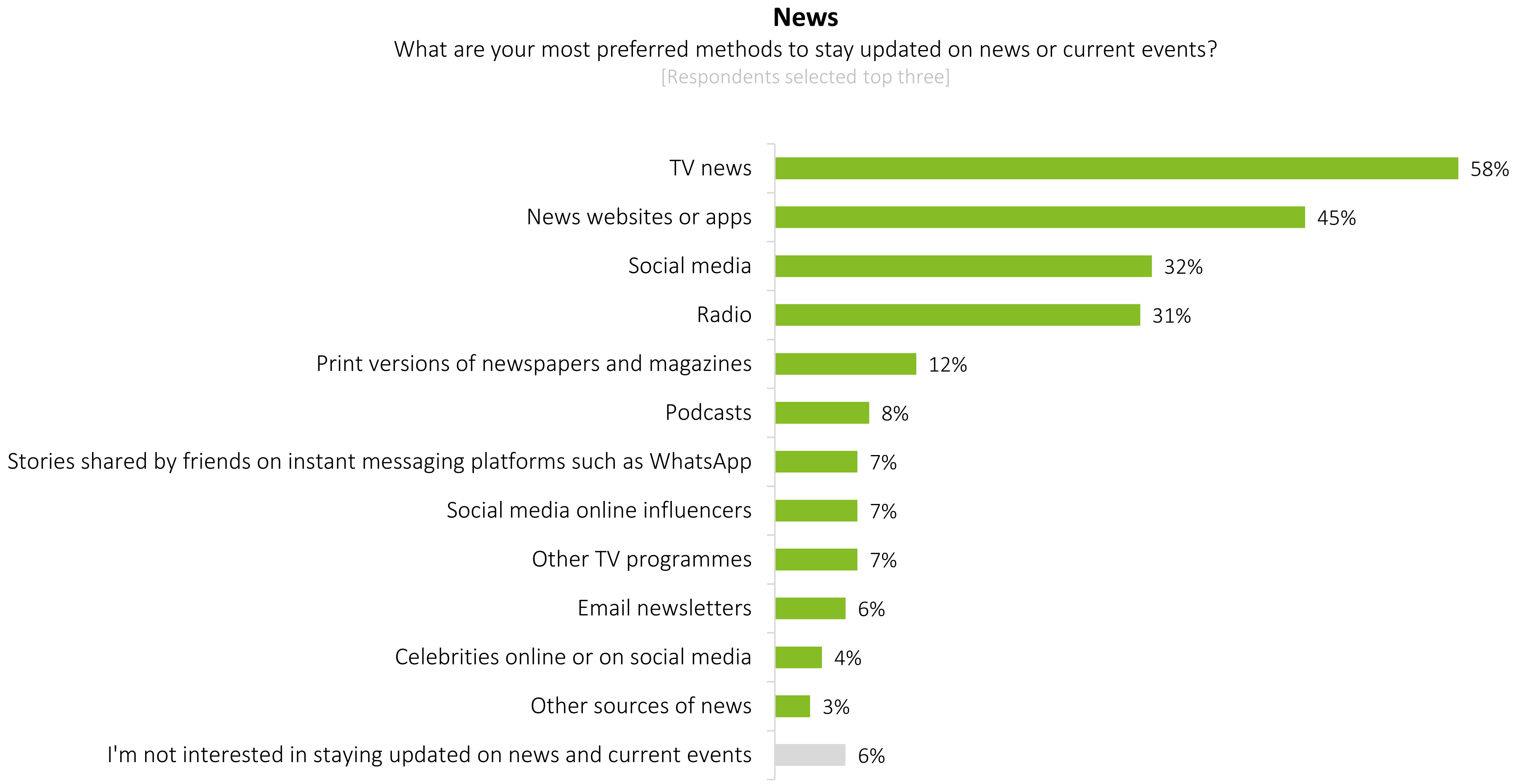
Which of the following paid subscription accounts do you have access to?*
Which of the following free video streaming services do you currently use?*



Weighted base: All respondents aged 16-75 years, 2023 (4,150), 2024 (4,150)
*Respondents were given a selection of popular accounts to choose from, including “Other” option
Source: Deloitte Digital Consumer Trends, UK, 2024


ONLINE

TV remains a primary source of news content for most, but there are variations by age group



Weighted base: All respondents aged 16-75 years, 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

Young groups use social media for news; older groups skew towards TV

Three in five (60%) 16–24-year-olds cite social media as a top-three preferred news source. Younger groups tend use more social media, and may engage organically with news content which is algorithmically tailored to them. They have access to a wide range of perspectives, including interactive elements like comments and debate, but the breath of potential sources means that verifying the accuracy and authenticity of a story is crucial.

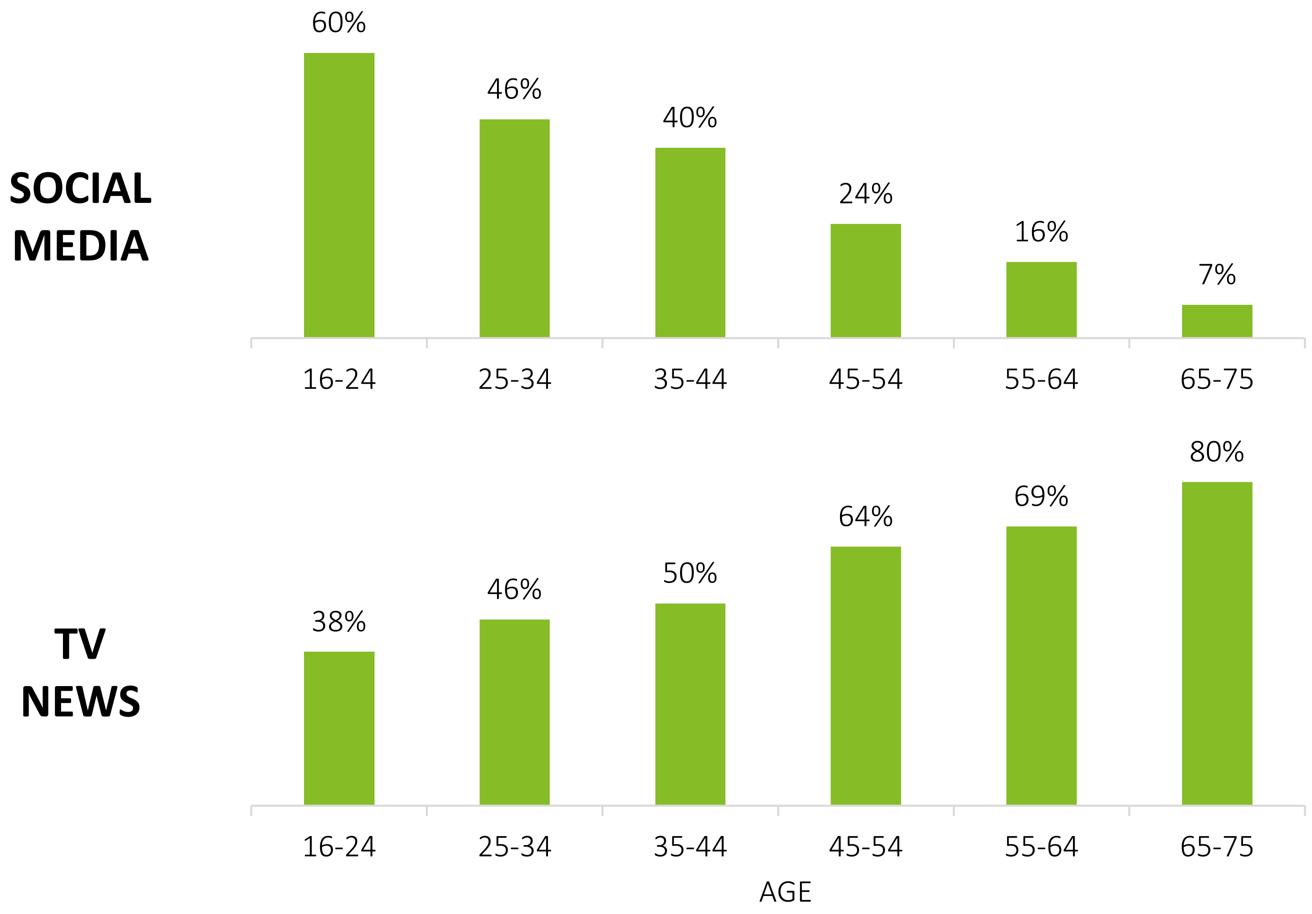
In contrast, a mere 12% of 55–75-year-olds cite social media as a top-three source. This group prefers traditional sources of news such as TV news – three-quarters (74%) cite it as a preferred source.

News websites and apps are a popular middle ground (45% of everyone cites them as a preferred source), which bridge the gap between preferences of old and young.

News

What are your most preferred methods to stay updated on news or current events?

[Respondents selected top three]



Weighted base: All respondents aged 16-75 years, 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

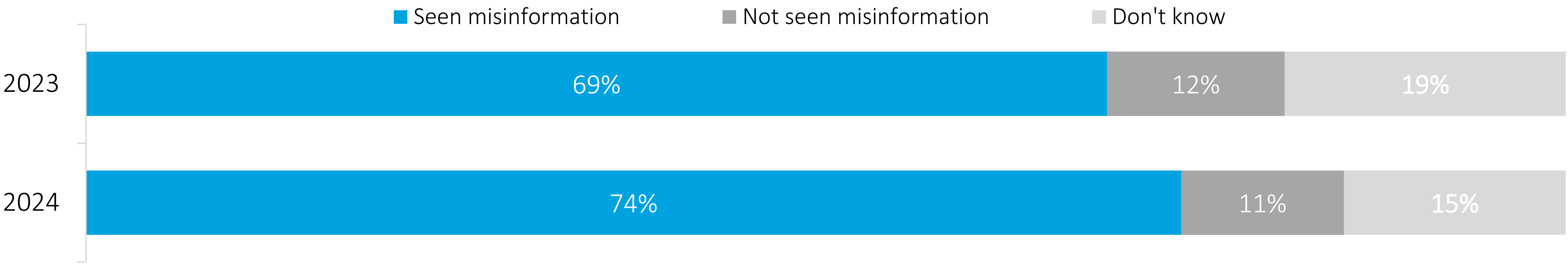
Online misinformation becomes more prevalent ahead of elections

The UK will hold General Election in 2024 or at latest early 2025. Given that news is now sourced from such a wide variety of sources, including social media, bad actors have a wide surface area to try and create false narratives.

In the last 12 months, three in four (74%) of people claim to have seen information deliberately designed to mislead. This is up from 69% in the previous year. This figure is self-reported, so only accounts for people who have actually identified misinformation (some may have seen misinformation, but not identified it). Younger groups are more likely to have seen misinformation, with just 4% of 16–24-year-olds claiming they had definitely not seen it in the last 12 months.

Online Misinformation

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



43% of people also think they see it **more regularly** than they used to

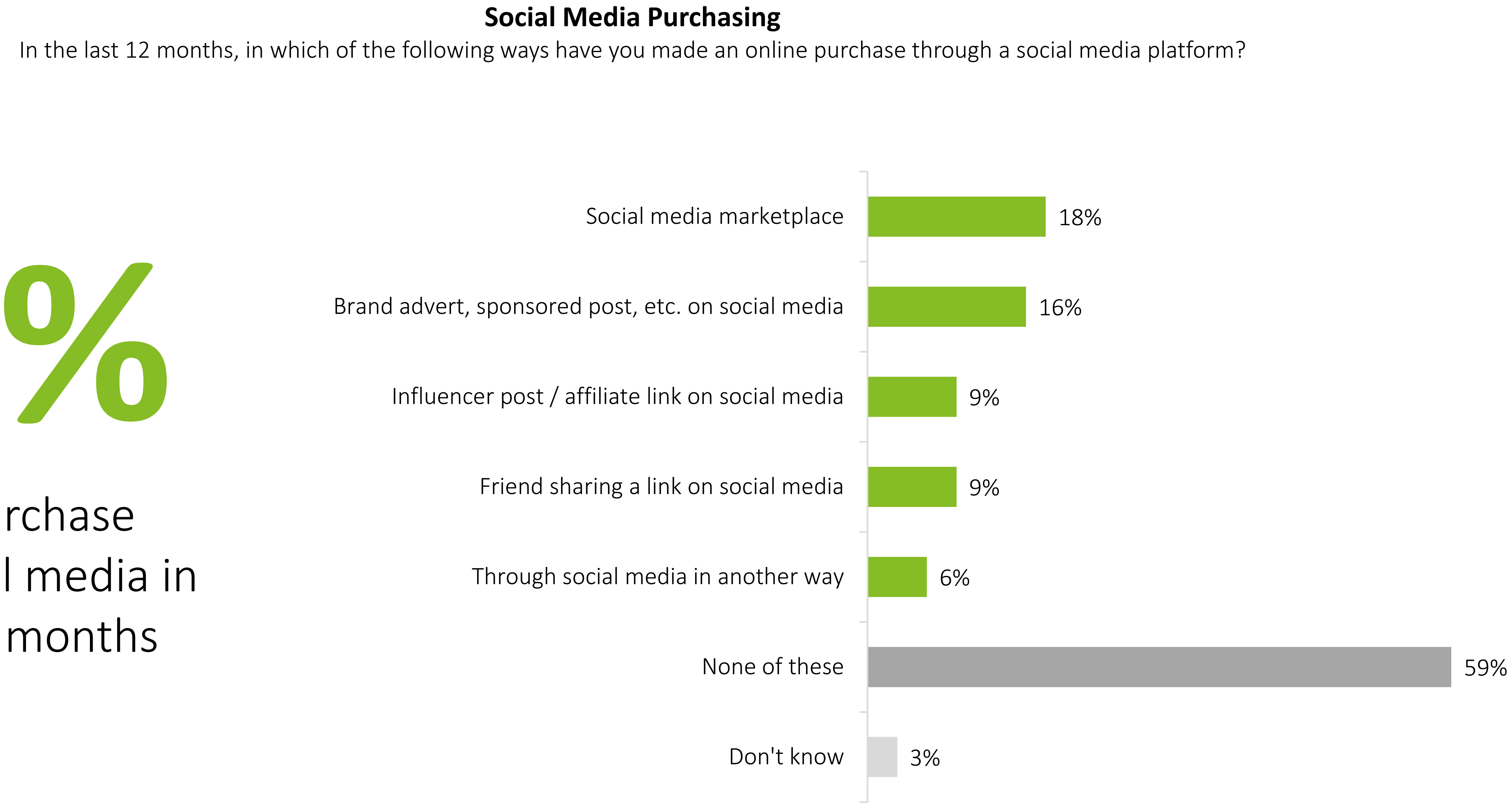
Weighted base: All respondents aged 16-75 years, 2023 (4,150), 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

*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?

One in ten (9%) made a purchase via influencer post or affiliate link on social media

37%

made a purchase through social media in the past 12 months

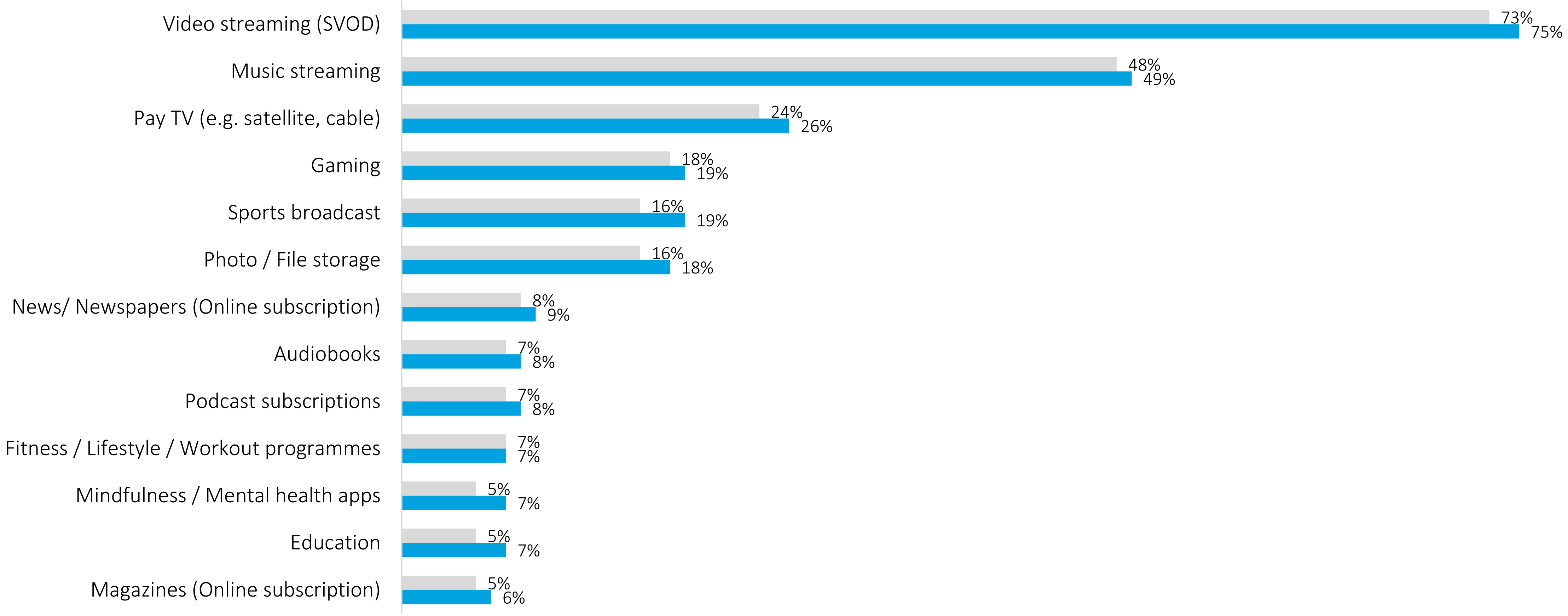


Weighted base: All respondents aged 16-75 years, 2024 (4,150)
Source: Deloitte Digital Consumer Trends, UK, 2024

Video streaming, music and pay TV are the most popular subscriptions

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?*



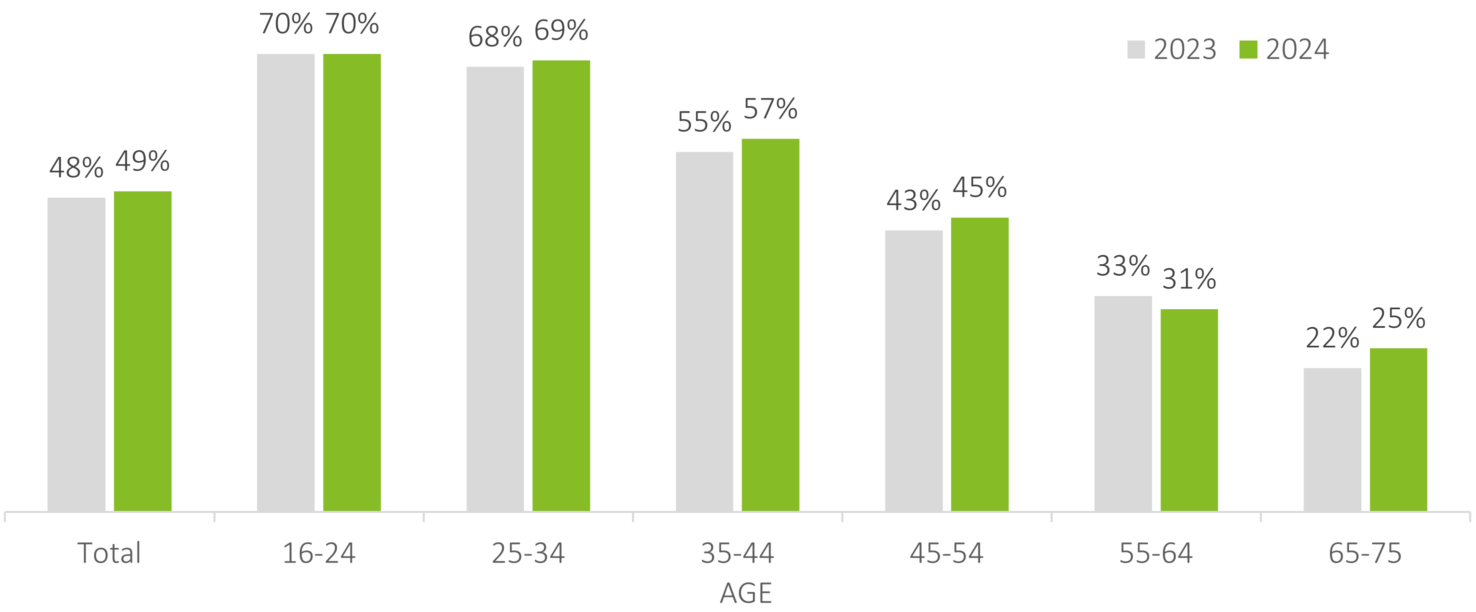
Weighted base: All respondents aged 16-75 years, 2023 (4,150), 2024 (4,150)
*not shown are respondents who answered None of These, Don't Know
Source: Deloitte Digital Consumer Trends, UK, 2024

Paid music subscriptions up despite price increases

Access to paid music streaming services continued to rise, in spite of price increases. Subscribers tend to be sticky, given the substantial logistical effort to reassemble a music library and playlists when switching service, or quitting altogether.

Music Subscriptions

Which, if any, of the following paid digital subscription services do you have access to?* [Music]



Weighted base: All respondents aged 16-75 years, 2023 (4,150), 2024 (4,150)
*Respondents were given choices, including Apple Music, Spotify Premium, YouTube Music, Amazon Music Unlimited, Amazon/Prime Music, and others.
Source: Deloitte Digital Consumer Trends, UK, 2023-2024

Almost half of respondents have used an app to support mental health

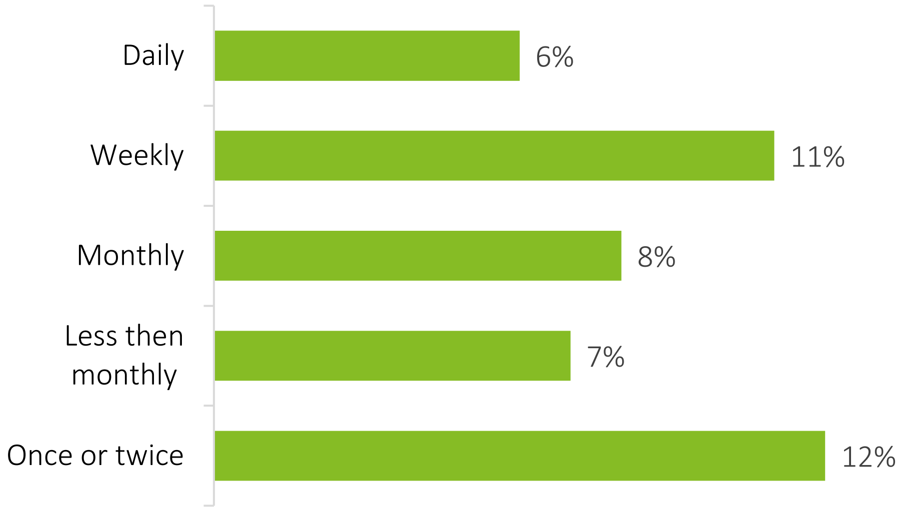
In 2024, one in four people (24%) use an app for mental health support, wellness or mindfulness at least monthly. These applications are not an alternative to professional medical advice and therapy, but can be used as a supplement between or in addition to treatment, or by those whose objective is to maintain a positive mental balance with a light-touch approach.

Mental Health Applications

How often, if at all, do you personally use apps dedicated to mental health support, wellness or mindfulness?

44%

have used a dedicated app for mental health, wellness or mindfulness



Weighted base: All respondents aged 16-75 years, who have a smartphone, 2024 (3,914)
Source: Deloitte Digital Consumer Trends, UK, 2024

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Digital Consumer Trends 2024

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, as well as materials from previous years.

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