

Assist Digital _ embrace the digital change

people's voice 2024

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who we are

We are a multinational leader in digital transformation, AI technologies, and omnichannel customer experience .

People are at the heart of our work: we identify and analyze their expectations and needs. For this reason, we have created the User Lab™, our center of excellence dedicated to user research. This laboratory enables us to deeply explore people's behaviors, identifying strategic insights to design effective, high-impact digital experiences to add value to brands and their customers.

We conduct our research on behalf of our clients on all channels, online and offline, both nationally and internationally. Thanks to partnerships with global research networks such as Esomar and UXAlliance, where we are the exclusive partner for Italy, we have access to a global perspective on people's needs.



purpose of the document

This document collects and summarizes the **main and recurring themes emerging from** our research conducted in 2024 for national and global clients, across key industrial sectors. The aim is to provide an **overview** of the most frequent **behaviors, new habits** and people's **needs**, while highlighting the initiatives companies are adopting to respond to trends detected in specific sectors.

Research sectors and methodologies involved

Our research involves a wide range of methodologies, both qualitative and quantitative, to capture **"the voice of the user"**, anticipate trends and insights to transform them into concrete **competitive advantages**. This approach supports our clients' strategies in listening to and implementing user needs across all channels. The research forming the basis of this document has investigated the behaviors of people in the USA, Europe and Asia. The sectors involved in the research include: banking, telco, e-commerce, entertainment, automotive, beauty, health, food and B2B tech.

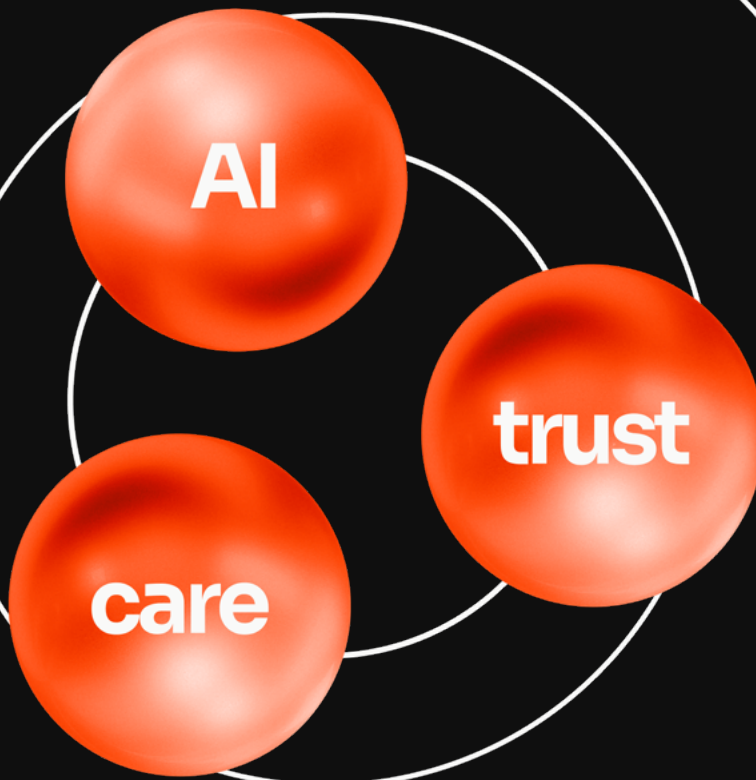
The methodologies used, both qualitative and quantitative, are the most varied and include: Survey, Focus group, In-depth interview, Usability focus, Benchmark, Home visit, Diary study, Verbatim analysis, Moderated and Unmoderated usability test, Wizard of Oz, Ideation/Validation Workshop, Contextual interview, Shadowing.



01 THREE KEY THEMES

AI, trust and care: the three central themes

01 THREE KEY THEMES



Our research has identified three key themes to classify the insights that emerged in 2024: **AI, Trust and Care**. These three pillars represent interconnected dimensions, where corporate strategic choices intertwine with the user needs, combining new expectations with growth opportunities.

At the same time, in a rapid changing landscape with increasingly pervasive technologies like Artificial Intelligence, there is a growing need to adapt to a fluid and complex scenario. The analysis of people's behavior does not indicate the dominance of any single trend but highlights a sense of disorientation that requires companies to take concrete action. Businesses are urged to build trust and take care of their users through a conscious approach that balances technological progress with human-centered attention.



AI and generative AI

New uses and needs

Artificial intelligence is becoming increasingly relevant across industries. As its adoption grows, companies are defining new skills, roles, and work methodologies, while simultaneously reshaping their operations.

In this context, users must familiarize themselves with AI, overcoming fears and learning to interact effectively. This adaptation process requires mutual collaboration: companies and users, whether consumers or professionals, must learn to manage and cooperate to extract the maximum value from this new context.

01 THREE KEY THEMES



AI





trust

01 THREE KEY THEMES

trust

Make him closer, let me trust him

Talking about the need to earn trust is certainly not a new trend, and mentioning trust itself might seem redundant. However, there is a growing necessity to **redefine trust's contours as it faces new challenges.** **Can a non-human be trusted?** **Can a global supplier be trusted?** **Will my specific needs be met?** **Can I give my money to an IVR?** These are the questions that users are asking and that **companies are trying to answer.**



care

What am i doing here?

The **scenarios** in which people move often seem to represent a **challenge** and a **questioning** of their **identity as users**.

Whatever the product or service, user **care** is characterized by **reassurance** and by **avoiding** a sense of **disorientation** and, at times, **inadequacy**, generated by the continuous evolution of **access and usage methods**.



care



The background features a teal gradient with various 3D-rendered shapes in purple, orange, and white, including cylinders, spheres, and rings. A white-bordered box with a rounded top-left corner is centered on the page.

02 INSIGHTS 2024

what are the major insights for 2024?

1

Full accessibility

The topic of accessibility is becoming increasingly important and expansive, with growing expectations for products and services to achieve a more advanced level of accessibility.

2

The key to trust

Trust must first be earned, then maintained and finally... extended. The theme of trust is to be understood as a key, a lever for accessing and accepting innovations, new products, services and brands.

3

Glocal approach

Outside of universities and within UX, the issue of “localization” of products and services arises especially, and this is not a paradox, for global players: users expect global services adapted to local contexts.

4

On the road to AI

The advent of AI has marked the beginning of a cognitive journey aimed at understanding and integrating it, with concrete expectations for enhanced performance effectiveness. In this context, users have high expectations for AI to become ever more accessible and integrated into their daily lives.





1 accessibility ever-broadening concept

INSIGHT 1 FULL ACCESSIBILITY

Accessibility is a topic of great interest today for various industries, especially in view of the entry into force of the Accessibility Act in June 2025. It is increasingly diverse, responding to users' evolving expectations and needs.

Artificial Intelligence (AI) plays a key role, by enabling **dynamic and adaptive experiences**, such as voice recognition and chatbots, ensuring **intuitive interactions** even for those with specific needs.

In addition to technology, the concept of **Care** brings **empathy and attention**, aiming to ensure **complete access to services**, beyond basic needs.

The integration of AI and Care creates dynamic, inclusive and adaptive experiences, capable of responding in real time to user's needs.



AI

CARE

TRUST

Digital accessibility

Access to digital interfaces and devices

“Usability” is broadening its meaning to become an all-encompassing term: every user, regardless of their personal condition, should be able to feel comfortable and at ease in any activity, context, or daily experience—including access to digital interfaces and devices. There is also a growing expectation for digital interfaces to be more inclusive and accommodating for users with disabilities.

Reference industrial sector

BANKING

The right to entertainment

Not just basic necessities

People with disabilities should not only have access to essential daily activities but also have the right and the opportunity to enjoy any service. This represents an expansion of the concept of accessibility and a growing awareness of the need to encompass increasingly diverse areas—ranging from basic needs to leisure, including the right to entertainment.

Reference industrial sector

ENTERTAINMENT





2 user trust as key

INSIGHT 2 THE KEY TO TRUST

It may seem obvious to say that companies strive to gain users' trust. However, it is interesting to observe how trust is being redefined with **new nuances**: on one hand, through **users' expectations** and behaviors, and on the other, through the **strategies** adopted by companies to strengthen that bond.

In fact, users tend to extend their trust by **"osmosis"**: they trust a new, unknown brand because it is linked to or collaborating with a brand they already know and consider reliable. This makes it easier to extend trust to products, services, or brands that are still unfamiliar.

Companies, for their part, capitalize on this **bond of trust**, presenting it as **a strategic "key"** to encourage the adoption of innovations, new offerings, and partnerships.



AI

CARE

TRUST

trust by osmosis

Who can I (also) trust?

Brand reputation and User behavior

Building user trust is essential for driving the adoption of new processes, products, or services. In some cases, a brand's reputation can also influence that of a sub-brand, if one exists. A user who trusts a particular company is more likely to extend that trust to other businesses associated with the parent brand.

Reference industrial sector

BANKING

I trust you because I trust him

Brand reputation to be built

The development of new proposals and new Brands that appear on the market, especially start-ups, poses the problem of “making a name for yourself”, building a brand identity and a brand reputation to gain/build the trust of users. Collaboration with well-established Brands constitutes a valuable “business card” for a new Brand in the eyes of users.

Reference industrial sector

E-COMMERCE

Don't forget about me

Maintaining trust

Users' trust is often put at risk by the perception of a lack of attention towards them.

They want to feel valued, with their trust nurtured, reaffirmed, and strengthened over time. They expect the brand to keep its promises, offer timely assistance when needed, guarantee transparency on prices and reward their loyalty over time with advantageous conditions linked to seniority.



Reference industrial sector

TELCO



3 the rebirth of glocal

INSIGHT 3 GLOCAL

The concept of Glocal, **think local in a global world**, has been well known in academic circles for over 20 years. Today, it increasingly shapes user needs and expectations, as well as corporate strategies for products and services.

In a globalized context, the dynamic between global and local influences user choices in consuming products and services. As a result, **global companies** are showing a strong interest in initiatives that make their **offerings feel more “local.”**

This approach is about **addressing user needs** while strengthening trust through a **sense of proximity**. It also extends to new ways of **accessing resources**, including those enabled by artificial intelligence.



AI

CARE

TRUST

Local needs and global offering

A context-sensitive UX

Customized products and services

Aware of living in a globalized world, users are increasingly seeking products and services that adapt to local needs and habits. It is essential for products, services, and experiences to be tailored to fit local characteristics and requirements. The same products can take on different forms in different contexts, making them more relevant, customized, and aligned with local specificities.

Reference industrial sector

FOOD DELIVERY - BEAUTY/HEALTH

It's also a question of style... changeable

A communication theme

Users expect the communication, style, personality, and features of a product or service to be adapted to the local context. This means using language and approaches that make them feel more familiar and accessible. A “global” product must adapt and behave differently depending on its target market. Users value linguistic and cultural choices that resonate with their experiences and geographic context, whether at a national or regional level.

Reference industrial sector

E-COMMERCE - AUTOMOTIVE - BEAUTY/HEALTH

A need for security

Dialogue and human contact

Users are appreciating companies that are committed to creating a relationship that is as human as possible even if it goes through digital channels. An example, the possibility of interacting with a human operator within the live chat when necessary. Interacting with a human makes the user feel more secure in the conversation with the live chat, AI.

Reference industrial sector

E-COMMERCE - AUTOMOTIVE - BANKING



4 on the road to AI

The adoption of AI is a central theme in our present, which generates both a lot of curiosity and a need for indications of use.

On the one hand, digitalization is perceived as an essential feature, in the present and future, capable of transforming processes and skills. On the other hand, the association of AI with something complex slows down its full acceptance.

The perception of complexity can be overcome thanks to a “guided” approach, in which those who introduce new technologies have the task of reassuring and showing that Artificial Intelligence (AI), while creating changes, can be an ally and not a threat.



In this sense, understanding AI is not just about learning how to use it but also recognizing its innovative value, becoming familiar with it, and actively participating in the transformation it brings.

Experiments like the one introduced in Italian schools, aimed at “humanizing” AI, represent an important step in helping students engage with these technologies from an early stage in their education and appreciate their significance.

Similarly, in the corporate world, the current limitations of underperforming tools like basic chatbots can slow down AI adoption. However, creating more immersive and human-centered experiences, designed around real user needs and performance improvements, can drive greater acceptance and appreciation of these technologies.

AI

CARE

TRUST

owning AI

AI is not replacing me

AI is still scary

Users are sometimes faced with the difficult “acceptance” of AI, which is still perceived as a threat.

There is a clear need to be reassured, through tools that are recognized as supports and not as substitutes for the human component.

Reference industrial sector

B2B TECH - ENTERTAINMENT - OPERATIONS

Help me learn about AI

Getting familiar with AI

Embracing and familiarizing oneself with digitalization often seems to be more preached than practiced by users. This highlights a genuine need for clear communication and targeted training that can reassure users, making AI feel more approachable and manageable. This process involves access to new digital tools and interfaces, balancing two key objectives: providing an effective tool while also offering reassurance to users.

Reference industrial sector

BANKING - B2B TECH

I want a more human experience

Using AI

In practice, users expect a more familiar and comfortable experience—such as avatars or humanoids with human-like faces, an adapted communication tone, and a more empathetic, understanding interaction.

To meet these expectations, they are increasingly favoring solutions like video tutorials and 3D simulations, which make AI feel more human and engaging.

Reference industrial sector

E-COMMERCE - AUTOMOTIVE

Thank you!

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Thank you!



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