



# About Deloitte's Digital Democracy Survey

- This is the eighth edition of research commissioned by Deloitte's Technology, Media and Telecommunications (TMT) practice.
- Focusing on four generations and five distinct age groups, the survey provides insight into how consumers aged 14 and above are interacting with media, products and services, mobile technologies, the Internet, attitudes and behaviors toward advertising and social networks—and what their preferences might be in the future.
- Fielded by an independent research firm from 11/22/2013 to 12/5/2013, the survey employed an online methodology among 2,075 U.S. consumers.
- All data is weighted back to the most recent census to give a representative view of what U.S. consumers are doing.
- For meaningful changes, we look for differences in year-over-year tracking and generations of at least five percentage points.

# Talking About the Generations

The survey focuses on four generations, and five distinct age groups:



## Trailing Millennials

Ages: 14-24  
Birth Years:  
1999 -1989



## Leading Millennials

Ages: 25-30  
Birth Years:  
1988 -1983



## Generation X (Xers)

Ages: 31-47  
Birth Years:  
1982 -1966



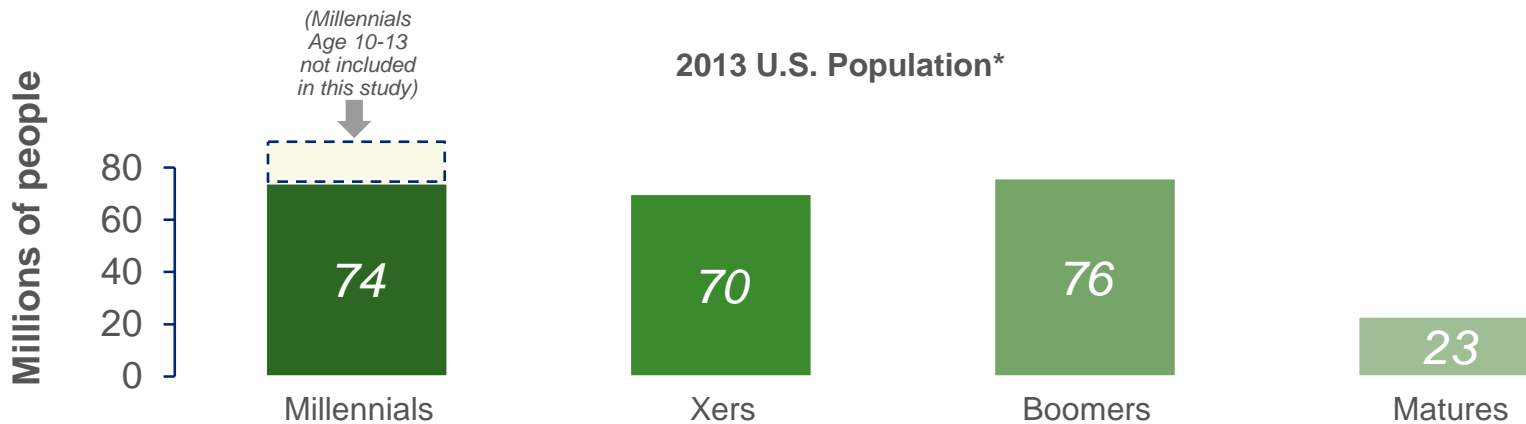
## Boomers

Ages: 48-66  
Birth Years:  
1965 -1947



## Matures

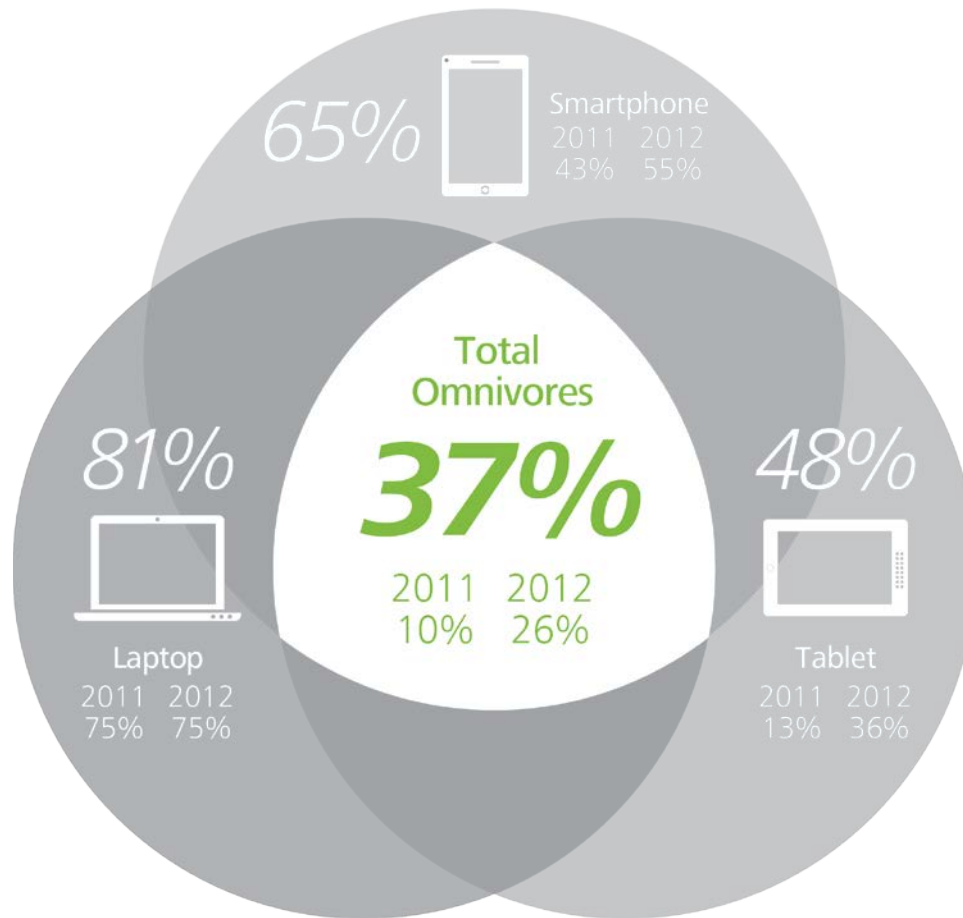
Ages: 67+  
Birth Years:  
1946 and prior



\*2010 U.S. Census Bureau – Population Division  
U.S. Interim Projections 2000-2050

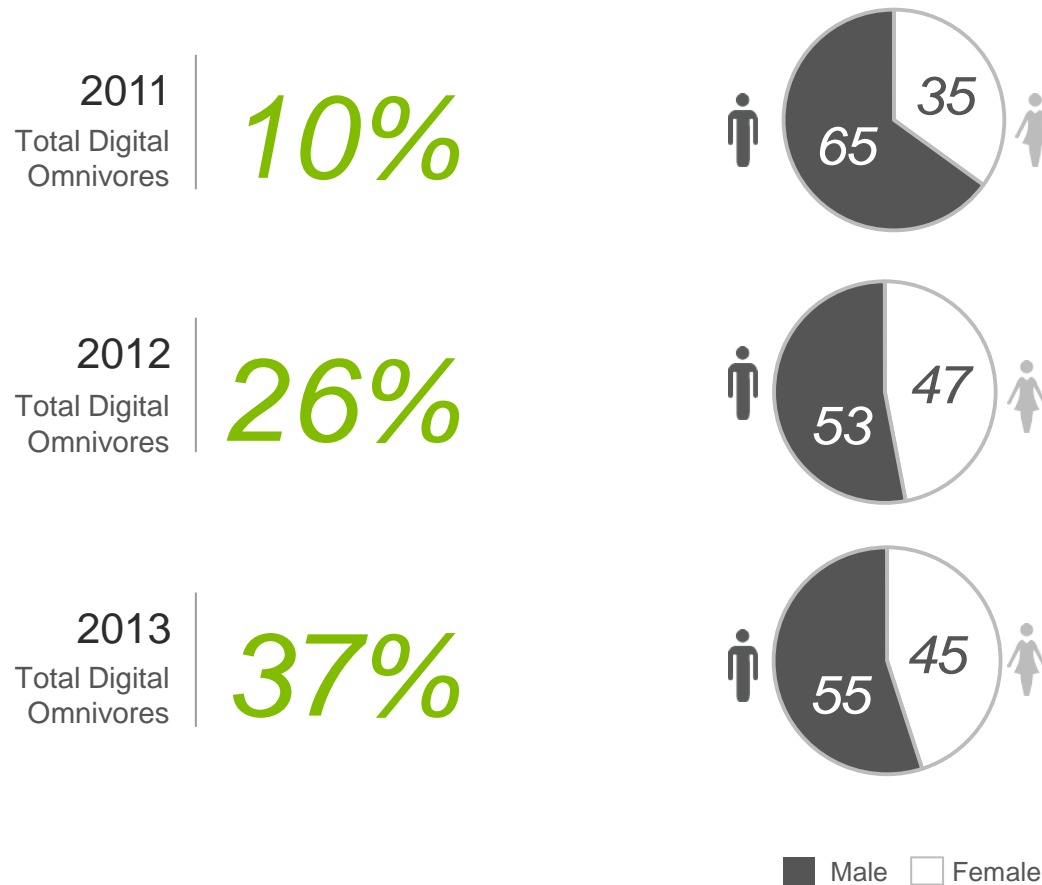
# The Digital Omnivore

# Over one-third of U.S. consumers are Digital Omnivores, consumers who own a trio of tablets, smartphones and laptops



# Women, who made up just over one-third of Digital Omnivores two years ago, now account for 45% of this group

Digital Omnivores (% gender )



# Evolving Consumption Models

# Renting is preferred to owning 3:1; Interest in streaming has almost doubled in the last year

Q. Thinking about how you rent/purchase video entertainment, such as movies and television programming, how frequently will you do each of the following in the next 12 months?

Among Total U.S. Consumers (%) Summary of Frequently (Everyday/Weekly)	2012	2013
<b>Rent (OVERALL)</b>	<b>28</b>	<b>42</b>
*Watch digital video entertainment via an online subscription streaming service	17	32
Rent dvd/blu-ray via mail service	13	11
Rent dvd/blu-ray via rental machine or kiosk	10	10
*Rent digital video entertainment where digital file is downloaded to your device	6	6
Rent dvd/blu-ray at a physical rental store	6	6
<b>Purchase (OVERALL)</b>	<b>12</b>	<b>13</b>
*Purchase digital video entertainment via online service	8	8
Purchase dvd/blu-ray at a brick and mortar retail store	6	6
Purchase a physical dvd/blu-ray from an online retailer	6	6

2013				
Trailing Millennials 14-24	Leading Millennials 25-30	Xers 31-47	Boomers 48-66	Matures 67+
<b>58</b>	<b>65</b>	<b>50</b>	<b>26</b>	<b>15</b>
49	58	36	17	9
14	20	11	7	7
11	16	15	5	1
8	20	7	2	0
9	11	9	3	2
<b>19</b>	<b>32</b>	<b>14</b>	<b>6</b>	<b>3</b>
12	23	8	2	2
9	12	7	2	0
9	15	7	2	1

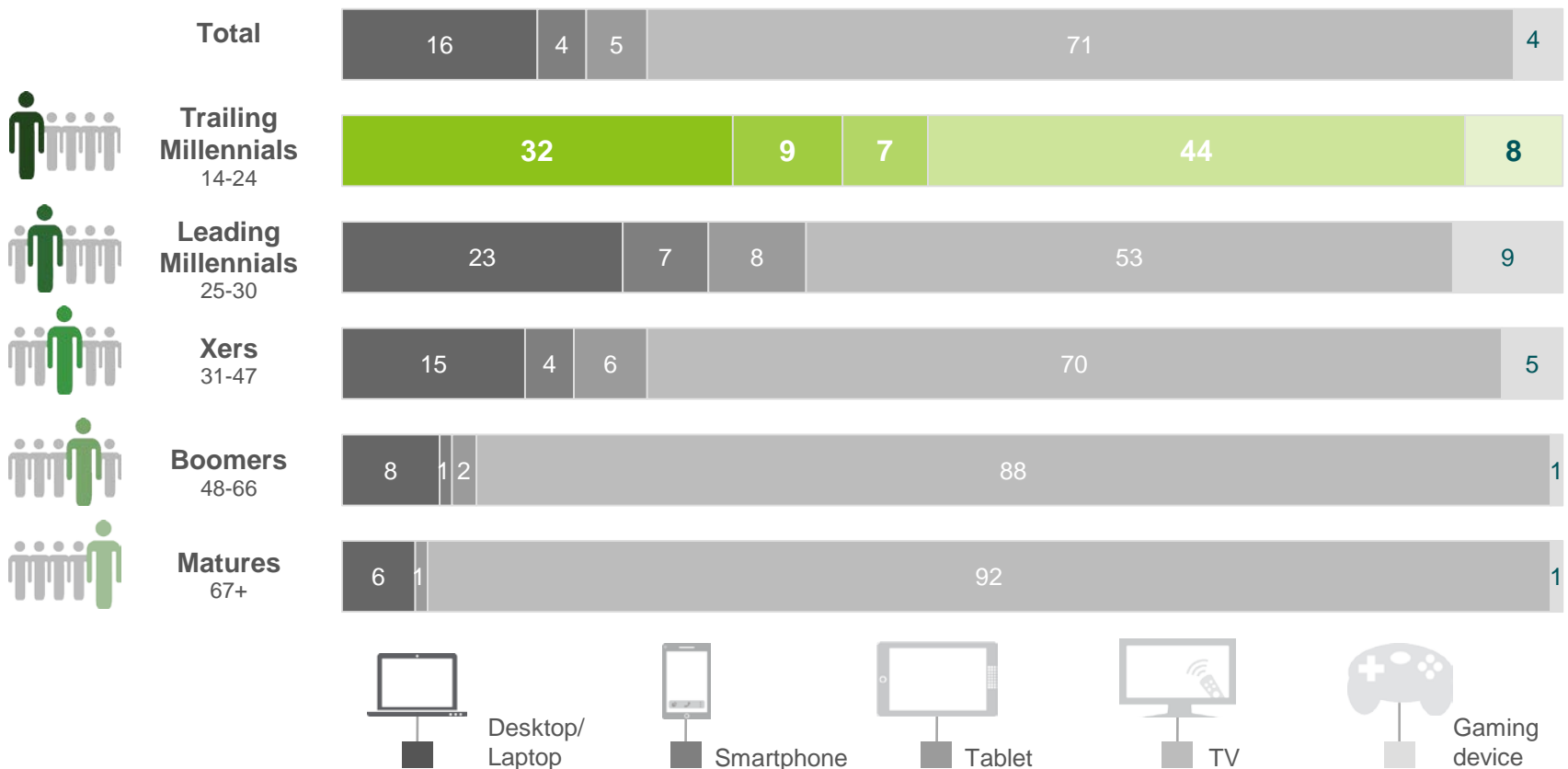
\*2012: Rent digital video entertainment via online streaming service (i.e., not a hardcopy); Rent digital video entertainment where digital file is downloaded to your local system; Purchase video entertainment via online streaming service



# Trailing Millennials are spending more time watching TV shows and movies on nontraditional devices than on TVs

Q. Of the hours you spend watching movies and/or TV shows per week, what percentage of time is spent watching on the following devices?

Percentage of time spent watching movies and/or TV shows on each device



# U.S. consumers indicate they are largely content with their current Pay TV services

Q. Which of the following statements best describes you and/or your household with regard to pay television service?

Among Total U.S. Consumers (%)	2012		2013				
	2012	2013	Trailing Millennials 14-24	Leading Millennials 25-30	Xers 31-47	Boomers 48-66	Matures 67+
I have paid television service and have no plans to cancel or change my paid television service within the next 12 months	69	67	65	63	62	70	80
I have paid television service and am considering changing to another paid television service provider within the next 12 months (NOT cancelling altogether)	12	14	13	16	16	14	6
I have paid television service and am considering canceling my service within the next 12 months (I am considering cancelling my service altogether)	5	6	7	6	8	5	2
I have cancelled my paid service in the last 12 months (I no longer have any paid television service at my home)	3	3	4	5	4	2	1
I do not have paid television service and have not had paid television service within the last 12 months	12	10	11	10	10	9	11

# Interest in purchasing TV channel a la carte packages is equal to consumer interest in bundled cable packages, with both at 47 percent

Q. In terms of how you purchase paid television, what would be your preference of the choices listed below?

Among Total U.S. Consumers (%)	2012	2013
Subscribe to a package of channels even if I do not regularly watch them all	50	47
Subscribe only to the channels I watch regularly	42	47
Purchase only those individual shows and events I want to watch	8	6

2013				
Trailing Millennials 14-24	Leading Millennials 25-30	Xers 31-47	Boomers 48-66	Matures 67+
49	52	47	44	47
46	43	46	49	48
5	5	7	7	5

# Multitasking on the Rise

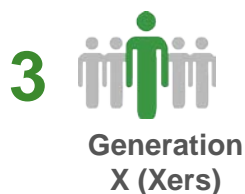
# Up from 72% two years earlier, 86% of all U.S. consumers say they are multitasking while watching television

Q. Which are things you typically do while watching your home TV?

Among Total U.S. Consumers (%) Summary of Always/Almost Always	Total 2012	Total 2013
Browse and surf the web	27	35
Read email	26	30
Text message	23	26
Use a social network	23	26
Write email	19	22
Browse for products and services online	17	21
Play video games	16	18
Talk on the phone	17	18
Purchase products and services online	11	16
Microblogging	9	14
Read for pleasure	14	14
Read for work and/or school	12	13
Nothing else - just watch TV	19	14

2013				
Trailing Millennials 14-24	Leading Millennials 25-30	Xers 31-47	Boomers 48-66	Matures 67+
52	51	35	26	10
35	39	29	30	16
51	41	25	13	3
48	48	26	14	5
25	33	22	19	12
32	36	21	15	5
25	26	20	13	8
21	27	22	14	6
23	23	18	10	4
35	28	12	2	1
16	25	15	9	8
24	27	14	3	1
7	9	12	16	27

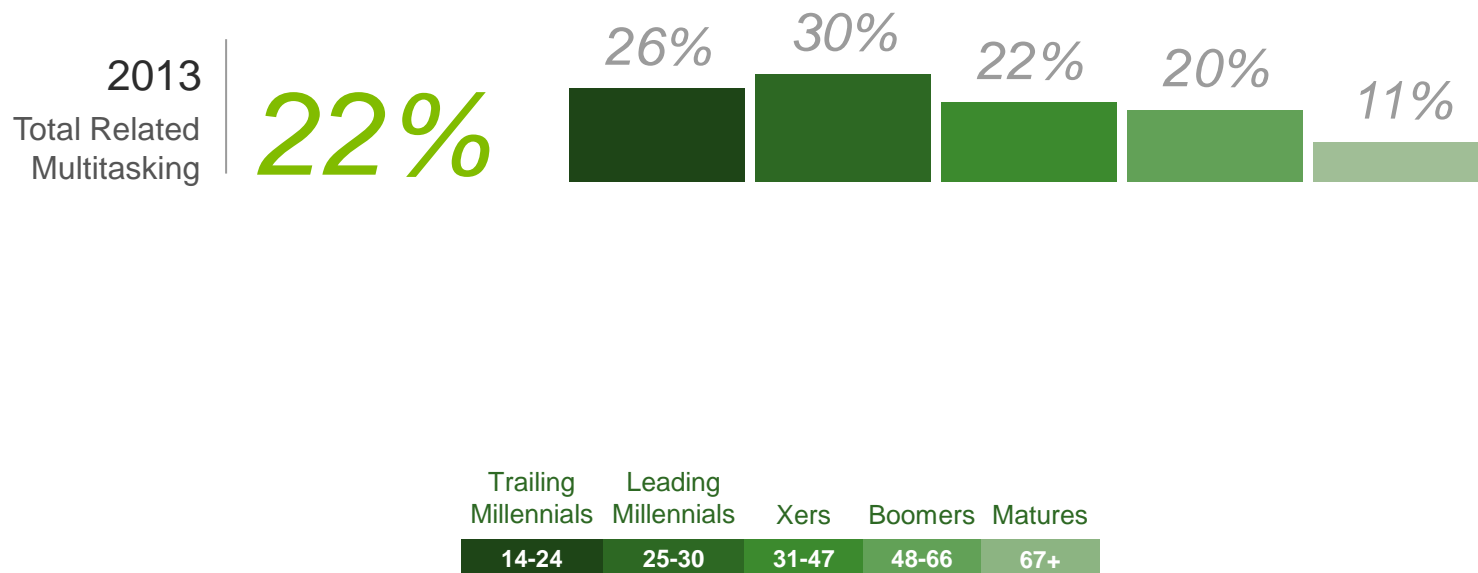
## Average number of additional activities while watching TV



# However, fewer than one-quarter of multitasking activities are directly related to the programs that consumers are watching

Q. What percentage of your multitasking activities are directly related to the program you are watching?

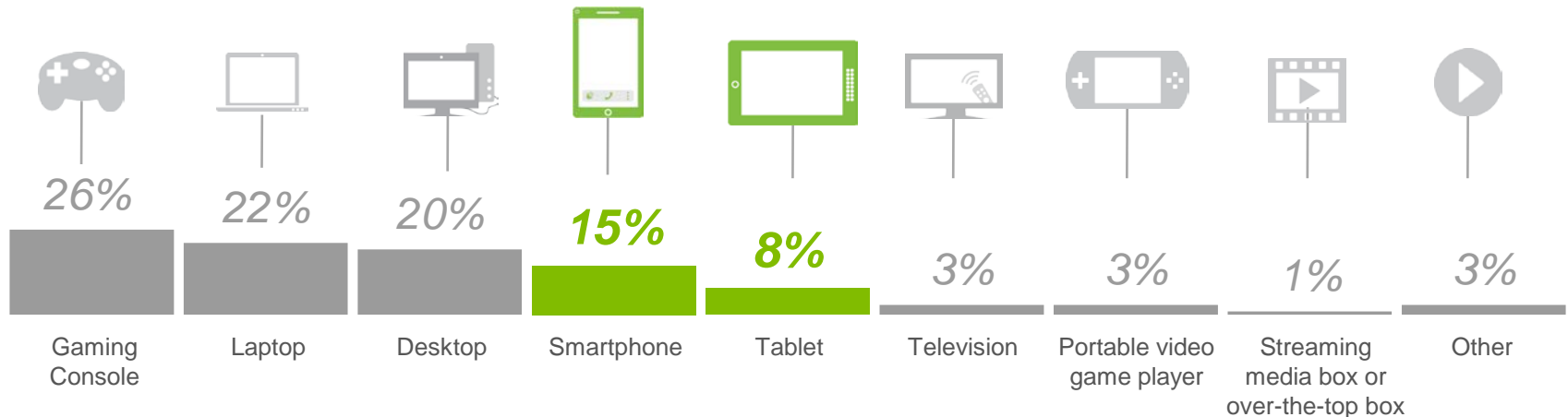
Percentage of Multitasking Directly Related to Program



# Gaming Beyond the Console

# Consumers are spending nearly a quarter of their gaming time on smartphones and tablets

Q. Of the time you spend playing games (all types of games), what percentage of time do you play games on the following devices?



Among Gamers (%) Gaming time on each device	Total
Gaming console	26
Laptop	22
Desktop	20
Smartphone	15
Tablet	8
Television	3
Portable video game player	3
Streaming media box or over-the-top box	1
Other	3

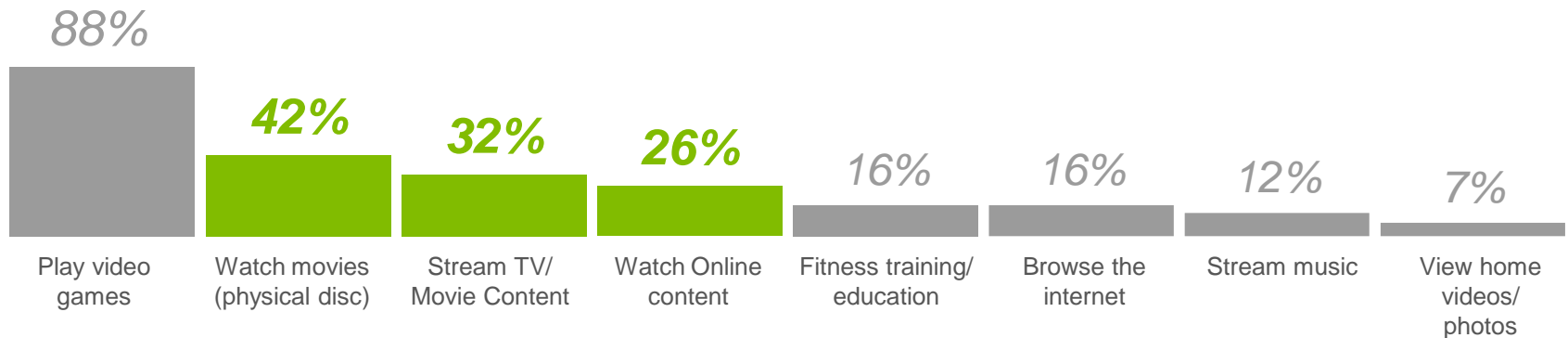
	Trailing Millennials 14-24	Leading Millennials 25-30	Xers 31-47	Boomers 48-66	Matures 67+
Gaming console	32	35	29	16	4
Laptop	18	16	19	27	34
Desktop	12	12	16	30	48
Smartphone	20	19	16	8	5
Tablet	6	7	10	10	7
Television	3	3	3	4	1
Portable video game player	5	3	3	1	1
Streaming media box or over-the-top box	1	1	1	0	0
Other	3	3	3	5	1

	Male	Female
Gaming console	32	19
Laptop	18	25
Desktop	21	19
Smartphone	12	17
Tablet	8	9
Television	3	3
Portable video game player	3	3
Streaming media box or over-the-top box	1	1
Other	2	4



# The gaming console is increasingly being used as a content consumption device

Q. What top three activities are you doing on your gaming console?



Among Console Owners (%)	Total
<b>Top three activities</b>	
Play video games	88
Watch movies (physical disc)	42
Stream TV/Movie content	32
Watch online content	26
Fitness training/education	16
Browse the Internet	16
Stream music	12
View home videos/photos	7

Trailing Millennials 14-24	Leading Millennials 25-30	Xers 31-47	Boomers 48-66	Matures 67+
90	91	89	82	91
41	49	46	31	11
39	38	32	21	9
43	20	20	18	6
14	18	14	21	17
18	12	13	22	26
16	16	11	8	8
3	6	8	9	12

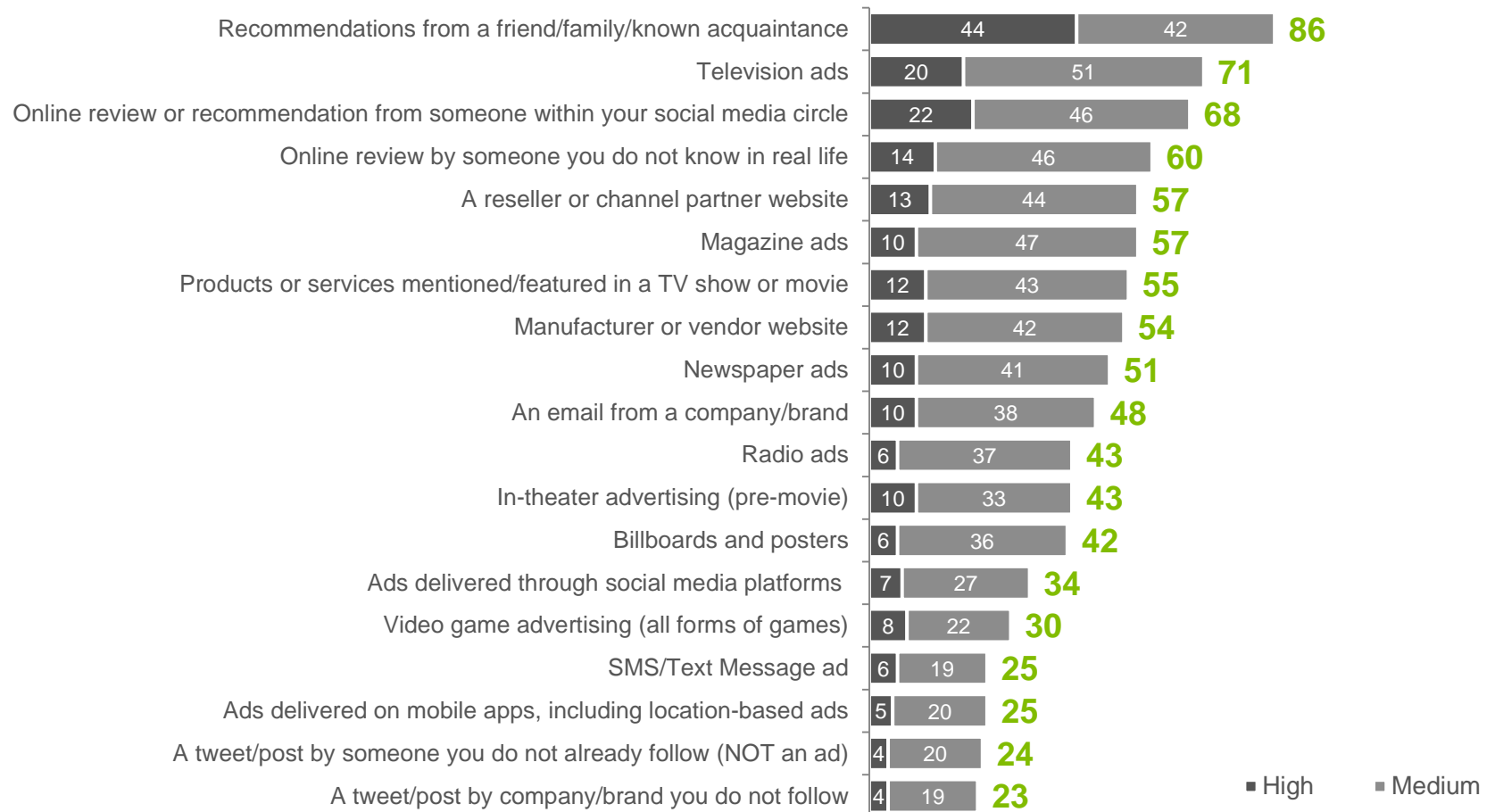
Male	Female
92	85
42	41
34	30
28	23
10	22
16	16
12	13
6	7

Social Media Influences All

# Personal recommendations, including those from within social media circles, continue to play a major role in buying decisions

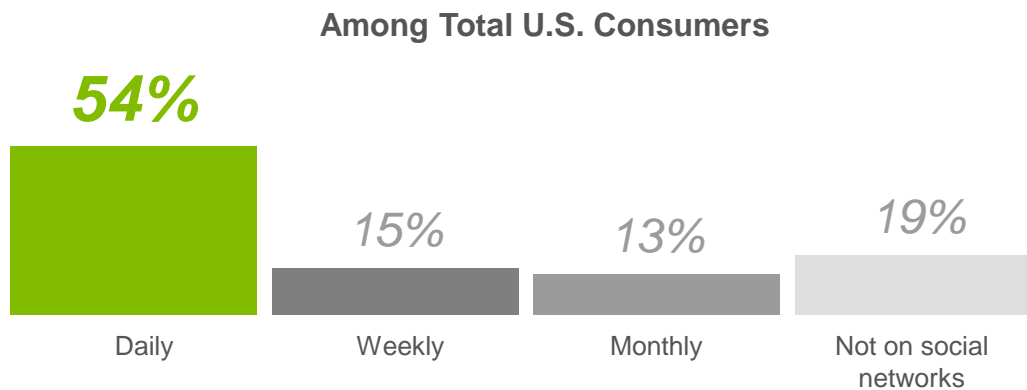
Q. To what degree do the following influence your buying decisions?

Total U.S. Consumers 2013 (%)




# Checking social networks is a daily habit for 54% of U.S. consumers

Q. How often do you update/check your profile/social network?



Among Total U.S. Consumers (%)	2013
1-3 times/day	33
4-10 times/day	12
10-20 times/day	6
More than 20 times/day	3
Weekly	15
Monthly	13
Not on social networks	19

2013				
Trailing Millennials 14-24	Leading Millennials 25-30	Xers 31-47	Boomers 48-66	Matures 67+
37	37	39	27	21
21	20	13	5	2
13	9	4	3	0
9	7	2	1	1
8	14	18	16	14
5	7	11	20	23
8	6	14	28	39



Male	Female
31	34
11	12
5	6
3	4
17	12
13	13
20	18

# Contact Us

Anisha Sharma  
Public Relations  
Deloitte

+1 917 464 3713

[anissharma@deloitte.com](mailto:anissharma@deloitte.com)

Kelly Williams  
Hill & Knowlton Strategies

+1 310 633 9443

[kelly.williams@hkstrategies.com](mailto:kelly.williams@hkstrategies.com)

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