



Reality check

State of the Media Democracy

Digitization, broadband, and mobile technologies are forcing drastic changes to existing business and revenue models. How should your organization respond? To ensure you are making the right decisions, you need to understand how consumer preferences and habits are changing as well.

Deloitte's multi-national fourth edition of the *State of the Media Democracy Survey* provides a generational “reality check” on how consumers are interacting with technology, purchasing products, and responding to advertising — and what they want in the future.

International in scope, the survey continues to focus on consumers between the ages of 14 and 75 from countries like Brazil, Germany, Japan, the United Kingdom, the United States, South Korea and India. Fielded by an independent research firm from September 11th through October 13th 2009, the survey explores distinct differences among four generations.

Providing keen insights on dozens of evolving trends, the survey offers detailed data on issues ranging from advertising effectiveness and mobile adoption to social media and Internet usage. Results from the survey provide critical insights for helping your organization make smart, well-timed business decisions and investments.

Want to learn more?

Visit www.deloitte.com/us/realitycheck



Deloitte's State of the Media Democracy Survey

Select Highlights, U.S. Fourth Edition

TV, Meet the Internet

- Over 70% of U.S. consumers rank watching TV in their top three favorite media activities. And when ranked alongside activities such as surfing the Web, listening to music or reading, 34% of Americans place it at the top of the list – a 26% increase from last year
- Over the last 6 months, U.S. consumers have watched their favorite TV programs on the following platforms:
 - 77% watched them live on their home television system
 - 30% watched them via their DVR on their home television system
 - 17% watched them via a free online video service (Hulu, TV.com)
 - 18% have watched via the show's Internet site – up from 13% last year
 - 10% viewed them from a video-sharing site (like YouTube)
 - 3% watched them on a portable MP3 video player
 - 2% watched them on their mobile/smart phone

The Mobile Phone: Lifeline for the Connected Consumer

- 47% of U.S. consumers state their "Smart Phone" is one of their three most valuable media & entertainment products; ranking it as #4 among owners – up from #10 last year
- U.S. consumers are frequently/occasionally doing the following with their phones:
 - 72% are text messaging – up from 65% last year, and increases across all generations
 - 42% are accessing the Internet– up from 36% last year
 - 30% are using mobile online search
 - 27% are downloading apps to their phone
 - 26% are using GPS – up from 9% last year
 - 15% are purchasing products

Videogames: The Shadow Distribution Platform

- Across all platforms, more U.S. consumers are playing newly released videogames than a year ago:
 - 47% have played via a home console – up from 31%
 - 42% have played on their PC – again up noticeably from 26% last year
 - 17% have played on a handheld – up from 11%
 - 13% have played on a mobile phone/smart phone – up from 4%

The Dawn of Tribal Marketing

- 65% of U.S. consumers frequently/occasionally visit Websites as a result of someone's online recommendation
- 55% of U.S. consumers believe strongly/somewhat that online consumer reviews and ratings influence their buying decisions more than any type of online advertising – 69% of Millennials
- 51% of U.S. consumers have purchased a product based on an online recommendation

And there is much more...

Advertising: The Next Generation
Baby Boomers
Digital Photography/Cameras
DVRs and TV Multi-Tasking
Future of the Media Democracy
Gender Attitudinal Differences
Generation X
I Want My Broadband!
Internet Insights
Magazine Insights
Matures
Media Products: Ownership & Preferences
Media Services: Subscriptions & Preferences

Media Platforms: Usage & Preferences
Millennials (Leading vs. Trailing)
Movies and DVDs
Music Insights
Newspaper Insights
Radio Insights
Search
Shop Till You Drop
Social Networking: Here to Stay
Technology Insights
Telecom Insights
User-Generated Content
Viral/Social Activities

For more information, or to schedule a meeting to discuss these and dozens of other findings, please visit:

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