



## The State of the Media Democracy Game changing

Rapidly evolving technologies continue to transform business and revenue models for companies across a broad swath of industries. How does your organization stay a step ahead? As part of a solid plan, executives must adjust to consumer preferences and habits. But what do consumers want?

The fifth edition of Deloitte's annual State of the Media Democracy survey provides unique generational insight into how consumers interact with technology, purchase products, respond to advertising — and what they'll likely be drawn to in the future.

Among this year's findings:

- TV remains powerful, especially when combined with the Internet
- A dramatic rise in smartphone adoption
- Steady popularity of print magazines
- The emergence of cloud computing

The State of the Media Democracy survey offers solid data and deep insight into dozens of evolving trends. It can provide critical insights for helping companies make smart, well-timed business decisions and investments.

To learn more, visit:

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## State of the Media Democracy survey selected highlights, U.S. fifth edition

### TV retains its power

- Despite the continued growth of access to television content through other channels, with more than half of U.S. consumers preferring to watch their favorite shows on their home TV system
- Nearly three-quarters of consumers prefer to watch their favorite TV shows live — even given a variety of other options, including recording systems or online video services
- TV programming continues to be the most discussed content, ahead of social networking sites, music, Websites and movies
- Flat-panel TV ownership has increased dramatically, with 59% of households now owning at least one

### Rise of the smartphones

- This year, 17% of consumers who owned smartphones rated the smartphone as their most valued device, up from 6% in 2007 and 2008
- Smartphone ownership is strongest in the households of trailing millennials (51%), leading millennials (54%) and generation Xers (42%)
- 30% of smartphone owners have used their device to make a purchase over the past year, and more than half have used their smartphone or other mobile device as a replacement for their laptop's functionality while away from home

### The State of the Media Democracy survey contains additional data on the following topics:

- 3D TV
- Attitudes toward DVR TV viewing
- Broadband cable
- Computers as entertainment devices
- Desirability of future technology
- Discs versus downloads
- DVR ownership
- E-book reader ownership
- Frequency of watching rented/purchased movies
- Gender-specific viewpoints
- Influential advertising
- Internet activities
- Internet quality
- Laptop/netbook ownership
- Methods for watching movies and videos
- Mobile phone feature preferences
- Mobile phone features not used — and why
- Online device usage
- Payment for online contributions
- Perceived value of devices
- Subscription services
- The Internet as a social tool
- Value of cell phone services
- Video entertainment: rent versus buy
- Which media consumers discuss with friends and colleagues

### Print magazines survive the digital tsunami

- Since 2007, a consistent 70+% of U.S. consumers continue to enjoy reading printed magazines — even though they know they can find the same content online
- Since 2007, 80+% of consumers who read a magazine in the past six months state that reading the printed copy is their favorite method
- 55% of households report subscribing to printed magazines
- 55% of U.S. consumers surveyed report that an important feature of printed magazine is the advertising that helps them learn about new things for themselves and their family

### Cloud computing may lead to universal content access

- Most U.S. consumers own a device that allows them to connect to the Web easily: 85% of households own a desktop computer, 68% of households own a laptop/netbook; 44% of households subscribe to broadband cable Internet access, 39% of households subscribe to broadband DSL, and 41% of all mobile phone users access the Internet on their mobile phone
- 51% of U.S. consumers have experienced a computer or hard drive failure that caused them to lose digital content, and 32% expressed a desire for an online media storage service
- 43% of respondents would like to move content to any device and platform easily and effectively — indicating that cloud storage could provide consumers with an attractive option for greater access to content and greater portability

For more information, or to schedule a meeting to discuss State of the Media Democracy findings, visit [www.deloitte.com/us/mediademocracy](http://www.deloitte.com/us/mediademocracy)