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Digital Democracy Survey

A multi-generational view of consumer technology, media and telecom trends

Ninth edition

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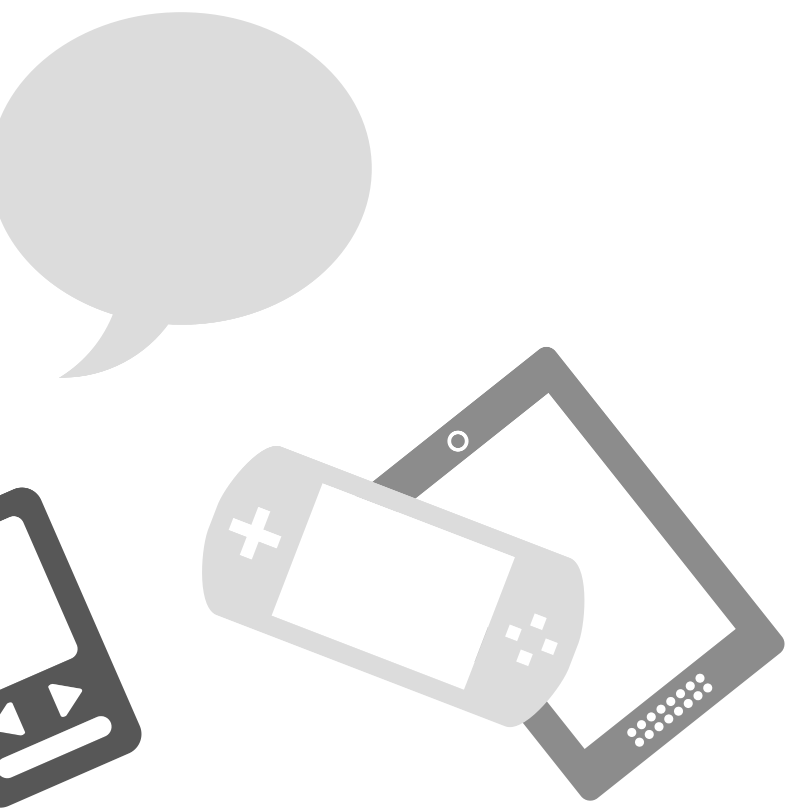


Preface

The rapidly growing amount of content available via the Internet and the proliferation of devices offering high quality viewing experiences has drastically shifted the way consumers view, access and purchase content.

The ninth edition of Deloitte's Digital Democracy Survey, fielded in November 2014, illustrates consumers' mounting appetite for content — especially video — anywhere, anytime and on any device.

In this executive summary of survey findings, we explore how the adoption of new technologies and devices is changing media consumption habits and preferences among U.S. consumers. These shifts in behavior are particularly insightful when looking at trends by generation.

The notion of consumers sitting in their living rooms to watch television shows at programmed times, especially among younger generations, is quickly giving way to a market of viewers using multiple devices inside and outside the home to consume content when and where they choose to watch. In 2014, there was a shift away from appointment TV to a large number of consumers binge-watching on their own schedules.

With so many new devices and technologies vying for our attention, consumers continue to be distracted while watching TV. The majority of consumers across all generations regularly multitask.

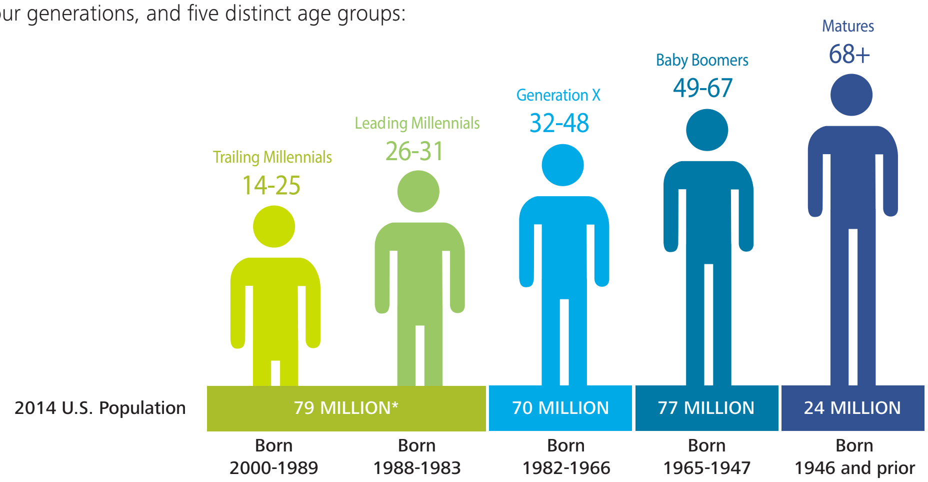
As so much content is being watched outside programmed times and on multiple devices, we'll explore shifts in the effectiveness of traditional and online advertising and the impact of social media on consumer behaviors.

This summary also explores how frequently consumers are using multiple devices to play games and takes a look at how consumers are using gaming consoles for more than just gaming.

Don't see what you're looking for in our executive summary? We've got a lot more data. For more information on Deloitte's Digital Democracy Survey, Ninth Edition, please email us at tmttrends@deloitte.com and follow us on Twitter @DeloitteTMT.

TALKING ABOUT THE GENERATIONS

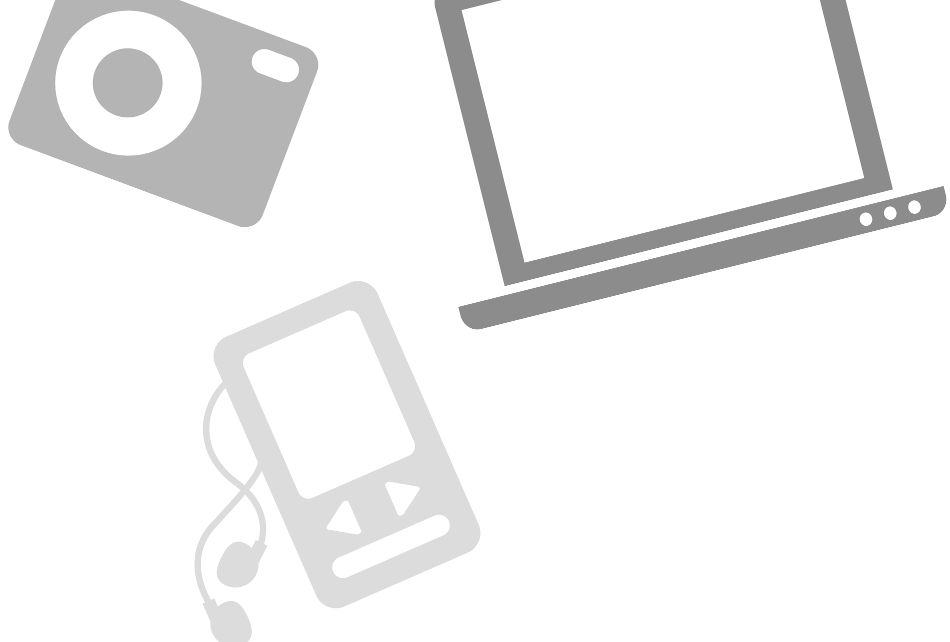
The survey focuses on four generations, and five distinct age groups:



**Millennials age 10-13 not included in this study*

Source: 2010 U.S. Census Bureau—Population Division, U.S. Interim Projections 2000-2050

Product and device landscape



PRODUCT OWNERSHIP BY U.S. HOUSEHOLD

Flat panel television and smartphone penetration continue to grow among U.S. consumers. Product and device ownership tends to be driven by generational trends, with Trailing Millennials often leading adoption of newer and more mobile technologies.

	Total 2014		14-25	26-31	32-48	49-67	68+
Among Total U.S. Consumers (%)	2013	2014	Trailing Millennials	Leading Millennials	Generation X	Baby Boomers	Matures
Laptop computer	81	**82**	91	87	88	77	60
Flat panel television	76	**82**	71	83	86	83	87
Smartphone	65	**71**	86	84	82	57	40
Desktop computer	71	**66**	62	58	62	70	83
Gaming console	58	**56**	80	72	63	40	19
Tablet	48	**54**	58	48	65	50	37
Digital video recorder (DVR)	51	**50**	43	45	56	50	54
Streaming media box or over-the-top box	17	**18**	17	23	25	12	10
Portable streaming thumb drive/fob	7	**9**	10	10	12	8	2
Fitness band	--	**9**	9	11	10	9	1
Smart watch	--	**3**	4	6	3	1	1

***Question**: Which of the following media or home entertainment equipment does your household own?*

TOP THREE MOST VALUED PRODUCTS AMONG OWNERS

Device value is mostly stable year-over-year with the exception of tablets, which appears to be dropping in relative value. Owners place relatively high value on new products, such as smart watches and fitness bands.

Top 3 Ranking Among Owners (%)	2013	Total 2014	Trailing Millennials (14-25)	Leading Millennials (26-31)	Generation X (32-48)	Baby Boomers (49-67)	Matures (68+)
Smartphone	72	76	76	78	79	75	65
Laptop computer	67	71	75	68	68	74	59
Flat panel television	62	62	40	53	62	70	80
Desktop computer	55	55	35	46	48	64	86
Basic mobile phone	39	36	13	22	20	50	52
Tablet	36	31	30	35	32	33	22
Gaming console	31	27	45	30	20	13	7
Digital video recorder (DVR)	20	22	11	15	25	24	29
Smart watch	--	18	^	^	^	^	^
Streaming media box or OTT box	18	15	13	24	18	10	2
Fitness band	--	14	^	^	^	^	^
Portable video game player	9	10	16	20	1	6	0
Portable streaming thumb drive/fob	5	6	^	^	^	^	^

^ base too small to show

***Question**: Of the products you indicated you own, which 3 do you value the most?*

INTENT TO PURCHASE IN THE NEXT 12 MONTHS AMONG NON-OWNERS

Although non-owners place TVs, laptops and tablets among the most highly ranked products to purchase in the next year, new technologies are showing substantial promise, especially with Millennials and Xers.

Among Total U.S. Consumers (%)	Total 2014	Trailing Millennials (14-25)	Leading Millennials (26-31)	Generation X (32-48)	Baby Boomers (49-67)	Matures (68+)
Flat panel television	30	22	25	35	39	19
Laptop computer	22	50	25	23	20	11
Tablet	22	27	23	28	17	15
Smartphone	19	28	23	24	18	10
Fitness band	11	12	14	15	8	3
Smart watch	10	13	17	13	6	1
Streaming media box or over-the-top box	9	11	12	15	6	2
Portable streaming thumb drive/fob	7	7	10	12	4	1
3D printer	6	7	8	7	6	1

***Question**: Of the products you indicated you do not currently own, which of the following do you plan to purchase in the next 12 months?*

TOP THREE MOST VALUED SERVICES AMONG SUBSCRIBERS

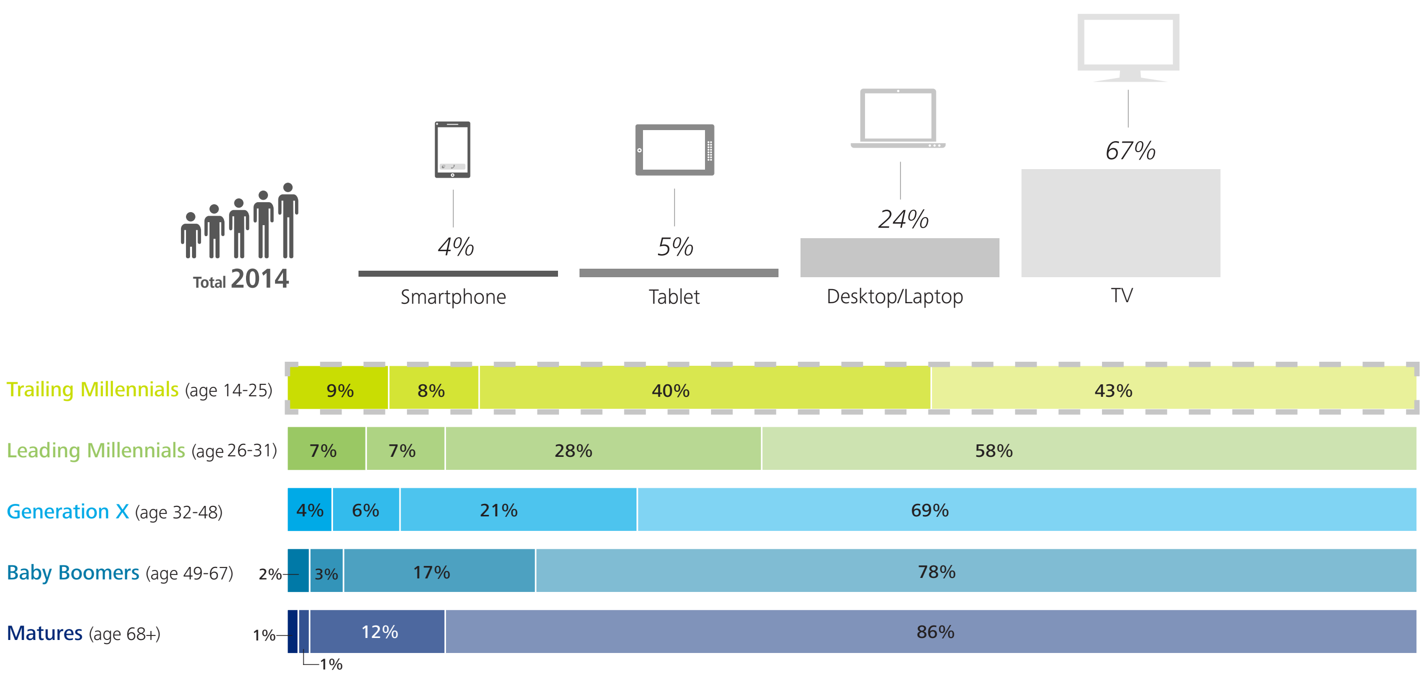
Home Internet is overwhelmingly the most valued service across all generations, with nearly all consumers ranking it in their top three. Pay TV's value is decidedly age-dependent. Trailing Millennials do not value it nearly as much as the other generations. Conversely, streaming services are highly valued among Millennials.

Among Total U.S. Consumers (%)	Total 2014	14-25 Trailing Millennials	26-31 Leading Millennials	32-48 Generation X	49-67 Baby Boomers	68+ Matures
Home Internet	94	93	93	93	94	95
Pay TV (cable and/or satellite)	80	58	75	80	89	92
Mobile data plan	58	69	65	67	39	22
Streaming video source	54	72	63	47	43	6
Mobile voice	46	37	47	52	48	35
Landline telephone	40	17	23	29	51	65
Gaming	40	62	41	26	15	-
Streaming music service	30	42	39	27	16	6
News/Newspaper (print or digital)	29	13	28	16	32	51
Magazine (print or digital)	15	14	15	12	16	17

***Question**: Of the services you indicated your household purchases, which three do you value the most?*

PERCENTAGE OF TIME SPENT WATCHING MOVIES BY DEVICE AMONG U.S. CONSUMERS

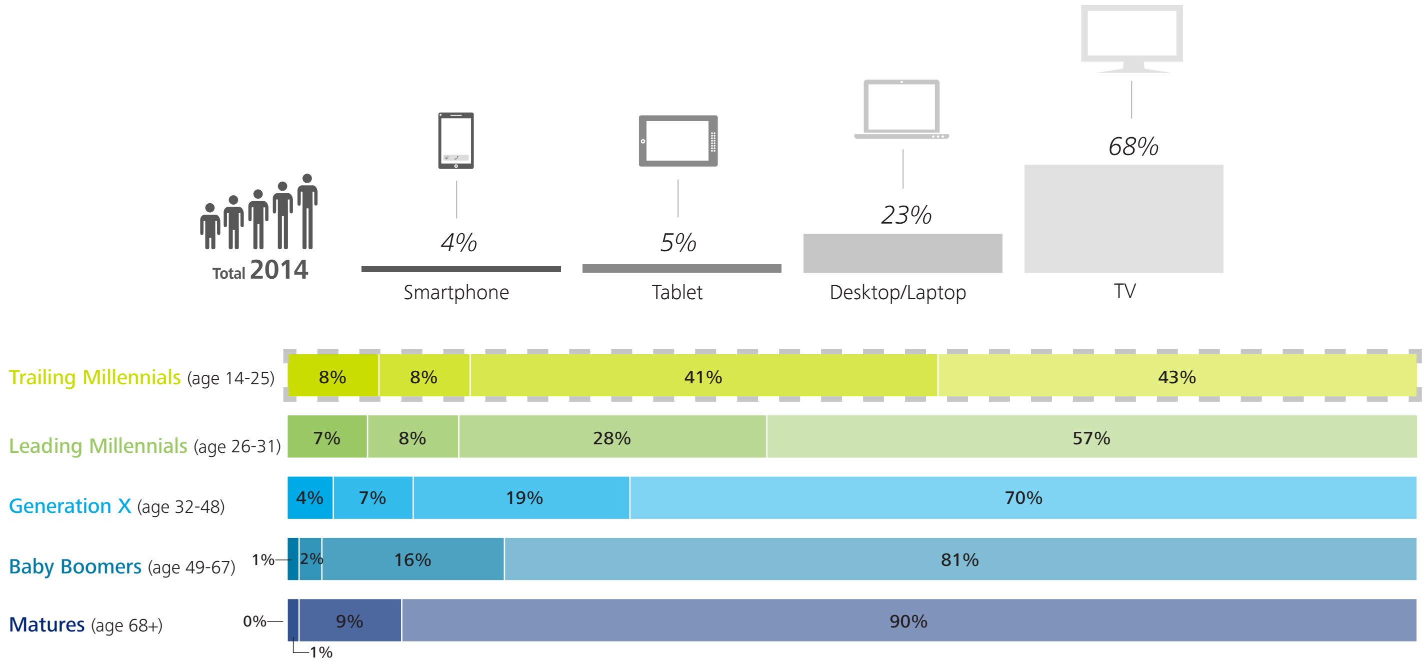
Although TV ownership remains strong and is growing, content is increasingly being viewed on platforms other than televisions. Movie viewing habits are categorically age-dependent. Among Trailing Millennials, nearly 60% of time spent watching movies occurs on computers, tablets, or smartphones.



***Question**: Of the time you spend watching movies, what percentage of time do you watch on the following devices?*

PERCENTAGE OF TIME SPENT WATCHING TV SHOWS BY DEVICE AMONG U.S. CONSUMERS

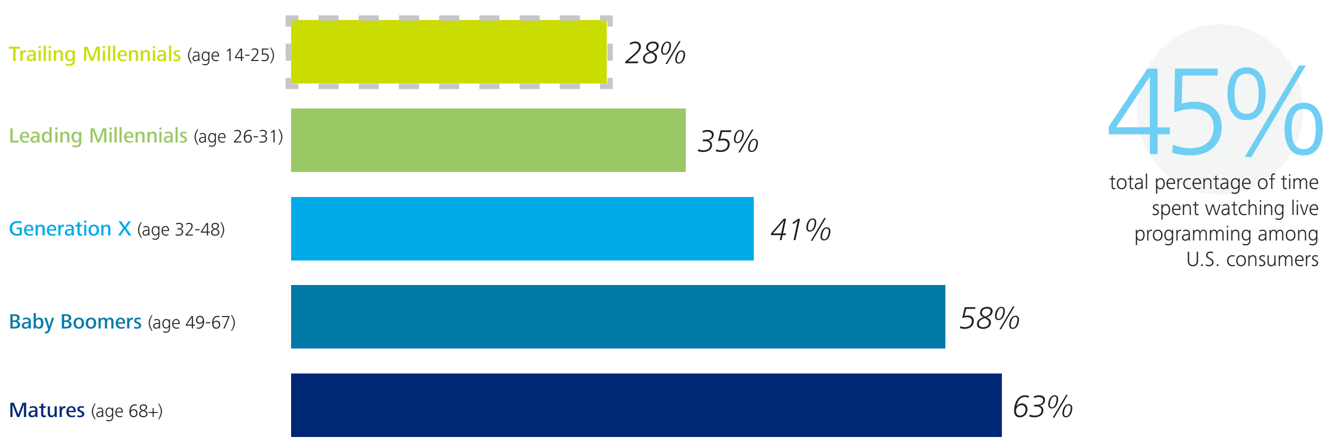
The same pattern applies to watching TV shows. Older viewers rely on televisions, while younger viewers have moved to computers and mobile devices. Trailing Millennials spend more time watching TV shows on non-traditional devices than on televisions.



Question: *Of the time you spend watching TV shows (e.g., 30- or 60-minute television programs), what percentage of time do you watch on the following devices?*

PERCENTAGE OF TIME SPENT WATCHING LIVE PROGRAMMING AMONG U.S. CONSUMERS

When taking into account that Trailing Millennials spend more time watching TV shows on non-traditional devices than on televisions, it's not surprising that only a quarter of television programming they watch is done live at the time of broadcast. The percentage of programming watched live increases by age.



Question*: When watching television content, what percent of time are you watching the following methods of programming?*

The personal viewing experience

The mainstreaming of digital

FREQUENCY OF STREAMING, RENTING AND PURCHASING MOVIES

Heavily driven by the adoption of streaming services among younger generations, the majority of consumers stream movies at least monthly. More than half of all consumers and three-quarters of Millennials stream movies on a monthly basis. When compared to weekly frequency, streaming dominates, with 34% of all consumers and 57% of Trailing Millennials streaming movies weekly. Though streaming is the norm, physical discs are not irrelevant. Almost half of consumers rent or buy physical discs on a monthly basis.

	Total 2014	Total 2014	14-25	26-31	32-48	49-67	68+
Among Total U.S. Consumers (%)	Weekly	At least monthly	Trailing Millennials	Leading Millennials	Generation X	Baby Boomers	Matures
Online Streaming Service	34	56	77	71	65	40	23
Rent DVD/Blu-Ray	10	35	40	47	40	29	17
Purchase DVD/Blu-Ray	6	29	36	40	30	25	14
Purchase/Rent via On Demand/ Pay-Per-View	6	26	28	34	31	22	12
Purchase Digital Download	5	23	31	36	28	13	6
Rent Digital Download	5	21	31	32	25	14	4

Question: *Thinking about how you watch movies, how frequently do you do each of the following?*

34% of U.S. consumers stream movies on a *weekly* basis

57% of Trailing Millennials stream movies on a *weekly* basis

48% of U.S. consumers rent or buy *physical* discs monthly

FREQUENCY OF STREAMING, RENTING AND PURCHASING TV SHOWS

Consumption patterns are similar for television programming; Trailing Millennials overwhelmingly stream, with approximately three-quarters using a streaming service on a monthly basis to watch television programs. Although older consumers have not adopted streaming at quite the same pace, it is still the most frequent method of renting/purchasing television content among those groups.

Among Total U.S. Consumers (%)	Total 2014 At least monthly	14-25 Trailing Millennials	26-31 Leading Millennials	32-48 Generation X	49-67 Baby Boomers	68+ Matures
Online Streaming Service	53	72	69	60	38	23
Rent DVD/Blu-Ray	28	31	36	31	24	14
Purchase/Rent via On Demand/ Pay-Per-View	24	22	35	29	20	10
Purchase DVD/Blu-Ray	23	29	33	26	19	9
Purchase Digital Download	19	26	31	23	11	5

Question: *Thinking about how you watch television programming, how frequently do you do each of the following?*

CONSUMER PERCEPTIONS OF THEIR STREAMING SERVICES

The reasons behind why people stream are clear. Consumers appreciate their streaming services for the ease with which they can watch commercial-free content anytime, anywhere, and on any device. Xers have a particular interest in the mobility of their content, with three-quarters saying they stream because it allows them to watch content where they want.

Among consumers with a streaming subscription service summary of Agree Strongly (%)	2013	Total 2014
It allows me to watch content when I want to	64	74
I value that it allows me to watch content without commercials	--	71
It allows me to watch content wherever I want	55	66
It allows me to watch content on multiple devices	53	56
The quality (visual and/or audio) is on par with the quality (visual and/or audio) of the content delivered through my pay TV service (cable and/or satellite)	45	49
I value its extensive library of TV shows	43	40
I value the ease at which I can discover new content	43	40
I value its extensive library of movies	42	36
I value the availability of recent TV show releases	36	33
I value the availability of recent movie releases	35	32

43% of U.S. consumers subscribe to a streaming video service

Xers value mobility of content

- 63% Trailing Millennials (age 14-25)
- 55% Leading Millennials (age 26-31)
- 74% Generation X (age 32-48)
- 67% Baby Boomers (age 49-67)
- 44% Matures (age 68+)

Question: *Please indicate how much you agree or disagree with the following statements about your streaming video service.*

Binge-watching

PERCENTAGE OF U.S. CONSUMERS WHO BINGE-WATCH TV SHOWS

Two-thirds of viewers "binge-watch" TV, watching three or more episodes of TV in one sitting. Millennials overwhelmingly engage in binge-watching behaviors. Not surprisingly, binge-watching is much more common among those who have a streaming subscription, but even those who don't have a streaming service still binge, likely via a DVR. Trailing Millennials binge-watch more frequently than any other generation, with 42% binge-watching on a weekly basis.

Among Total U.S. Consumers (%)	Total 2014	Trailing Millennials (14-25)	Leading Millennials (26-31)	Generation X (32-48)	Baby Boomers (49-67)	Matures (68+)	Have Streaming Subscription	No Streaming Subscription
Ever Binge	68	84	83	74	56	37	83	57

Question: *Do you ever "binge-watch" television shows, meaning watching three or more episodes of a TV series in one sitting?*

FREQUENCY OF BINGE-WATCHING

Among Binge-Watchers (%)	Total 2014	Trailing Millennials (14-25)	Leading Millennials (26-31)	Generation X (32-48)	Baby Boomers (49-67)	Matures (68+)
At least once a week	31	42	30	25	29	26
At least once a month	34	35	40	38	28	24
At least every six months	27	19	23	27	35	29
At least once a year	8	4	8	11	8	21

Question: *How frequently do you "binge-watch" television shows?*

MOST BINGED GENRE

TV drama is the most popular television genre to binge-watch, as a continuous narrative lends itself well to multi-episode viewing. Comedies are the second most popular genre to binge-watch, with a sharp drop after that. There are some gender differences among binge-watchers, with women being more likely to binge on dramas and men being more likely than women to binge on comedies.

Among Total U.S. Consumers (%)	Total 2014	Trailing Millennials (14-25)	Leading Millennials (26-31)	Generation X (32-48)	Baby Boomers (49-67)	Matures (68+)	Male	Female
TV drama	54	49	54	58	57	53	51	58
TV comedy	20	25	23	19	16	11	24	16
Reality TV show	7	8	7	8	6	4	5	9
Contest show	3	2	2	2	4	2	3	2
Daytime shows	2	2	3	2	3	5	2	3
Variety/talk shows	1	1	1	1	0	1	1	1
Do It Yourself (DIY)/Cooking shows	4	2	3	6	6	3	4	4
None of the above	9	11	8	5	8	21	10	7

Question: *When you "binge-watch," what kind of show are you most often watching?*

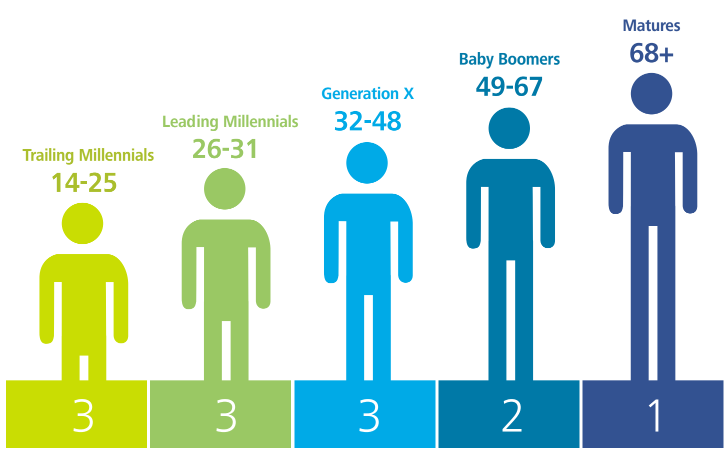
Multitasking

PERCENTAGE OF U.S. CONSUMERS WHO MULTITASK WHILE WATCHING TV

Ninety percent of consumers are multitasking while watching TV. On average, Millennials and Xers are doing three additional activities while watching TV, typically surfing the web, emailing, texting, or social networking.

Among U.S. Consumers Summary of Always/Almost Always (%)	2012	2013	2014 (Total)	Trailing Millennials (14-25)	Leading Millennials (26-31)	Generation X (32-48)	Baby Boomers (49-67)	Matures (68+)
Browse and surf the web	27	35	32	42	45	35	25	9
Read email	26	30	28	28	32	32	28	16
Text message	23	26	28	53	41	30	14	3
Use a social network	23	26	26	47	38	27	13	3
Browse for products and sevices online	17	21	20	28	30	22	12	7
Talk on the phone	17	18	19	22	19	22	17	8
Write email	19	22	17	16	22	21	13	10
Purchase products and services online	11	16	16	22	22	18	11	4
Play video games	16	18	16	24	23	15	13	8
Read for pleasure	14	14	13	16	17	15	9	6
Microblogging	9	14	13	29	20	11	4	0
Read for work and/or school	12	13	11	20	15	13	6	0
Nothing else — just watch TV	19	14	10	6	4	9	12	19

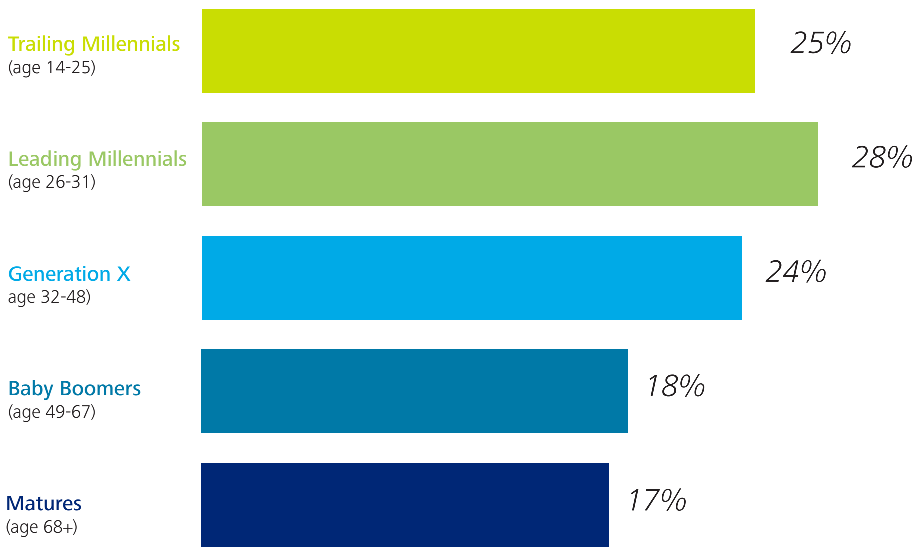
***Question**: Which are things you typically do while watching your home TV?*



Average number of additional activities while watching TV

PERCENTAGE OF MULTITASKING DIRECTLY RELATED TO THE PROGRAM

Despite the high percentage of consumers who are multitasking while watching TV, fewer than one-quarter of multitasking activities are directly related to the programs that consumers are watching.



22%

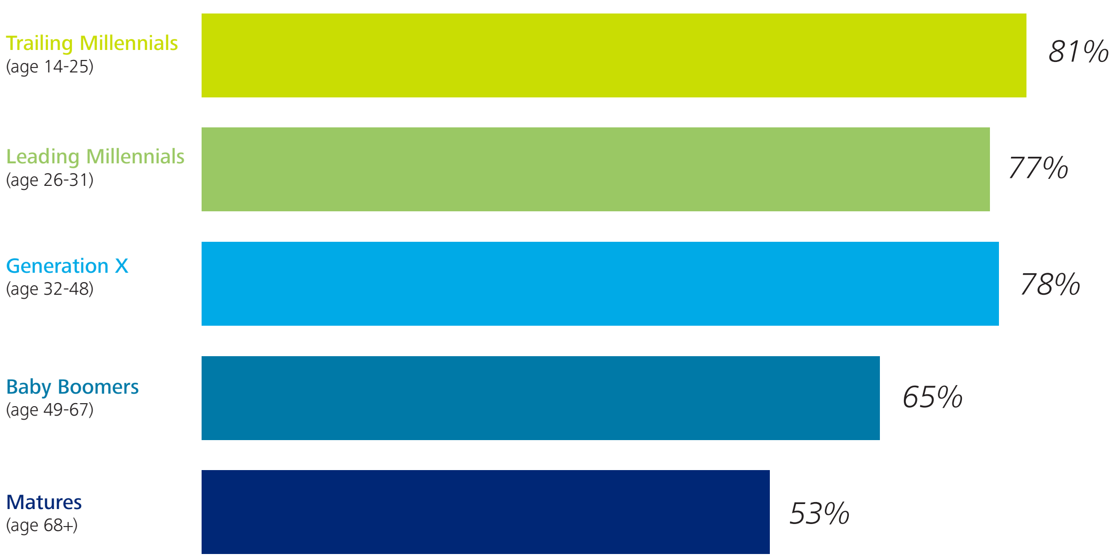
total percentage of multitasking activities that are directly related to the programs that U.S. consumers are watching

***Question**: What percentage of your multitasking activities are directly related to the program you are watching?*

INTENSITY OF ATTENTION RELATED TO DIGITAL ADS

When compared to traditional TV advertising, consumers tend to pay more attention to digital (online) ads. Four out of five Millennials are more distracted during TV ads than digital.

I tend to multitask on another device or activity more while watching television ads than digital (online) ads:



73%

of U.S. consumers tend to multitask on another device or activity more while watching television ads than digital (online) ads

***Question**: Thinking about advertisements that come on during television or digital (online) programming you watch, please rate the following statements using the scale below.*

Viewing preferences

TOP THREE FEATURES IMPROVING VIEWING EXPERIENCE

Video and audio quality are universally the most important factors in improving viewing experience, with screen size also playing a significant role. However, there are significant gender preferences, with males appreciating higher resolution and screen size more, and females showing an interest in a simpler way to search and find content.

Among Total U.S. Consumers (%) Summary of Top Three Ranking	Total 2014	Trailing Millennials 14-25	Leading Millennials 26-31	Generation X 32-48	Baby Boomers 49-67	Matures 68+	Male	Female
Higher resolution video content	73	76	74	71	72	75	77	70
Better sound/audio	69	72	70	67	69	68	71	68
Larger screen size	64	59	61	68	66	62	68	61
Simpler way to search and find content	52	46	45	52	56	65	46	59
More/better features for interacting with the programming you're watching (e.g., audience voting)	19	20	23	20	16	16	16	21
3D video	13	12	14	12	15	8	14	12
More social media integration	10	14	13	10	6	6	9	10

***Question**: Thinking about the entertainment content you watch at home, which three characteristics would improve your viewing experience the most?*

VIDEO CONSUMPTION BY GENRE

Movies will continue to outpace all other video genres in the next 12 months. Consumers are generally less selective in choosing movies than TV programming due to the time commitment of a full television series season. Trailing Millennials may choose their TV series even more carefully than older generations.

Among Total U.S. Consumers Intending to Watch Less/More	2014 Less	2014 More
Movies	5	27
News	10	20
User-generated content	13	19
Sports	9	19
30-minute sitcoms	11	15
60-minute dramas	13	13
Music videos	17	10
Cartoons for adults	16	9
Cartoons for children	17	8
Contest shows	21	7
Reality TV	18	7
Talk/Variety shows	19	7
Game shows	19	6
Children's shows (live)	16	6

Less
More

***Question**: Thinking about your consumption of video content and programming, do you think you will watch more, about the same, or less of each of the following types of video content in the next 12 months?*

PREFERENCES RELATED TO MOVIE AND TV VIEWING

68%

of U.S. consumers are more selective in watching television series than movies because television series are a full season commitment

76% Trailing Millennials (age 14-25)

72% Leading Millennials (age 26-31)

67% Generation X (age 32-48)

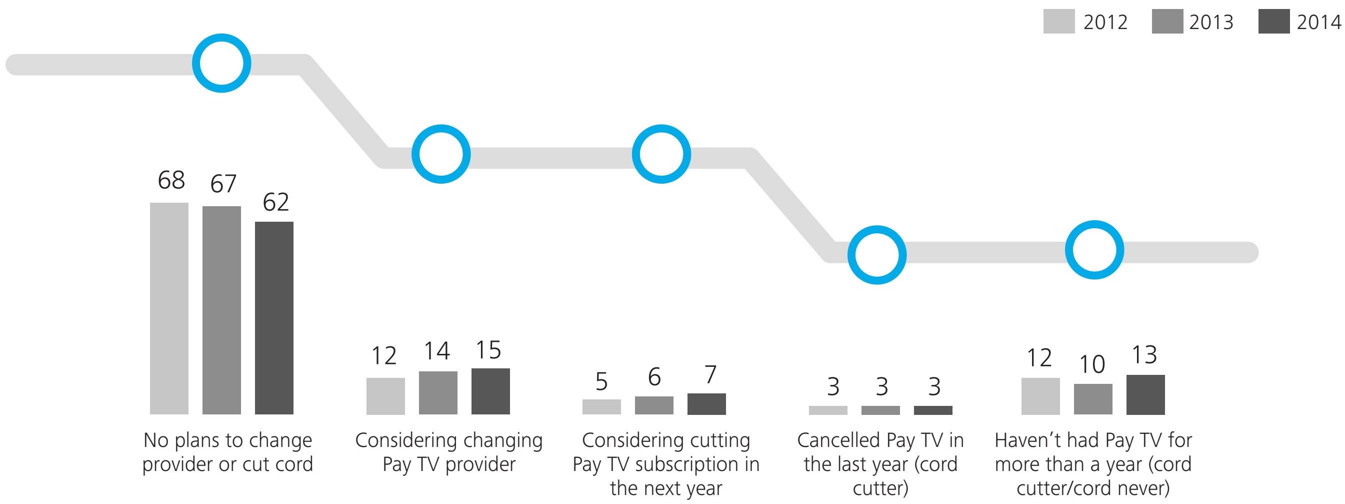
61% Baby Boomers (age 49-67)

65% Matures (age 68+)

***Question**: Please indicate how much you agree or disagree with the following statements.*

PAY TV SUBSCRIPTION ROADMAP

There was a decrease in the number of Pay TV subscribers that say they have no plans to change providers or cut the cord this year. A quarter of Trailing Millennials either cancelled their Pay TV subscriptions in the last 12 months or haven't had Pay TV for more than a year. This trend is more pronounced among the older Trailing Millennials aged 19-25 than the younger 14-18 year olds.



Trailing Millennials (age 14-25) **2014 Total**	54	14	7	7	18

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

25%

Ages 14-18: *21%*
Ages 19-25: *28%*

INTEREST IN CHANGING OR CANCELLING PAY TV SERVICE

Millennials and Xers are significantly more open to change, with only about half saying they have no plans to change.

Total 2014

Among U.S. Consumers (%)	2012	2013	2014
I have paid television service and have no plans to cancel or change my paid television service within the next 12 months	68	67	**62**
Trailing Millennials (age 14-25)	68	65	**54**
Leading Millennials (age 26-31)	61	63	**55**
Generation X (age 32-48)	67	62	**54**
Baby Boomers (age 49-67)	70	70	**69**
Matures (age 68+)	78	80	**74**

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

PAY TV SUBSCRIPTION PREFERENCES

Consumers are increasingly interested in purchasing TV channels in à la carte packages, with over half saying they prefer to subscribe only to the channels they watch regularly. The trend is consistent across the generations, and occurs in parallel with a decrease in the number of channels watched on average.

			Total 2014	14-25	26-31	32-48	49-67	68+
Among Total U.S. Consumers with Pay TV Service (%)	2012	2013	2014	Trailing Millennials	Leading Millennials	Generation X	Baby Boomers	Matures
Subscribe only to the channels I watch regularly	42	47	**52**	52	49	54	51	53
Subscribe to a package of channels even if I do not regularly watch them all	50	47	**40**	39	42	43	40	38
Purchase only those individual shows and events I want to watch	8	6	**8**	9	9	4	9	9

Question*: In terms of how you purchase paid television, what would be your preference of the choices listed below?*

AVERAGE NUMBER OF CHANNELS WATCHED

			Total 2014	14-25	26-31	32-48	49-67	68+
Among Total U.S. Consumers with Pay TV Service (%)	2012	2013	2014	Trailing Millennials	Leading Millennials	Generation X	Baby Boomers	Matures
Average Number of Channels	15	13	**11**	9	11	11	12	10

Question*: Think about the channels you watch on your paid television service. How many channels do you watch regularly?*

The current state of advertising

BUYING DECISION INFLUENCE

Personal recommendations, including those from within social media circles, play a major role in buying decisions. Interestingly, consumers say that an endorsement from an online personality is just as influential as one from a celebrity.

	High influence	Medium influence	Total
Recommendations from a friend/family/known acquaintance	38	43	81
Television ads	18	47	65
Online review or recommendation from someone within your social media circle	17	44	61
Online review by someone you do not know in real life	11	39	50
In-theater advertising (pre-movie)	12	34	46
Magazine ads	6	38	44
Products or services mentioned/featured in a TV show or movie	7	37	44
A reseller or channel partner website	9	34	43
Manufacturer or vendor website	7	35	42
Newspaper ads	7	34	41
Radio ads	5	32	37
An email from a company/brand	6	31	37
Billboards and posters	6	30	36
Ads delivered through social media platforms	6	25	31
Video game advertising (all forms of games)	7	19	26
An endorsement from a celebrity	5	20	25
An endorsement from an online personality	5	19	24
Ads delivered on mobile apps, including location-based ads	4	17	21
SMS/Text Message ad	5	15	20
A tweet/post by someone you do not already follow (NOT an ad)	4	15	19
A tweet/post by company/brand you do not follow	4	14	18

Question: To what degree do the following influence your buying decisions?

ADVERTISING AND STREAMING SERVICES

Consumers show a willingness to endure advertising in exchange for discounted content. Two-thirds of consumers say they would be willing to view advertising with streaming video programming if it significantly reduced the cost of the subscription.

Bingers have a higher willingness to endure advertising in exchange for discounted content with 69% of bingers saying they would be willing to view advertising with their streaming video advertising if it significantly reduced the cost of their subscription.

	Total 2014	14-25	26-31	32-48	49-67	68+
Among U.S. Consumers Summary of Agree Strongly/Somewhat (%)	2014	Trailing Millennials	Leading Millennials	Generation X	Baby Boomers	Matures
I would be willing to view advertising with my streaming video programming if it significantly reduced the cost of the subscription	62	69	66	66	57	43

Question: *Please indicate how much you agree or disagree with the following statements.*

69%
Bingers

57%
Non-bingers

Willingness to view advertising with streaming video if it significantly reduced cost of subscription

Content originators

BUYING DECISION INFLUENCE

Eight percent of consumers are "Content Originators," meaning they actively upload photos and videos, write reviews, and maintain blogs. Content Originators are bigger consumers of content in all forms, but especially movies – close to 90% stream movies on a monthly basis as compared to just half of non-Content Originators. They also purchase/rent far more on-demand and digital downloads.

Total 2014

Among Social Networkers Summary of Frequently/Occasionally (%)	2014
I upload my own photos to a photo-sharing site	38
I write product reviews on review sites, e-commerce sites, blogs, etc.	29
I upload my own videos to a video-sharing site	23
I maintain my own blog for others to read about me and my opinions	21

Question: *Thinking about social networking, how frequently do you do each of the following?*

8%

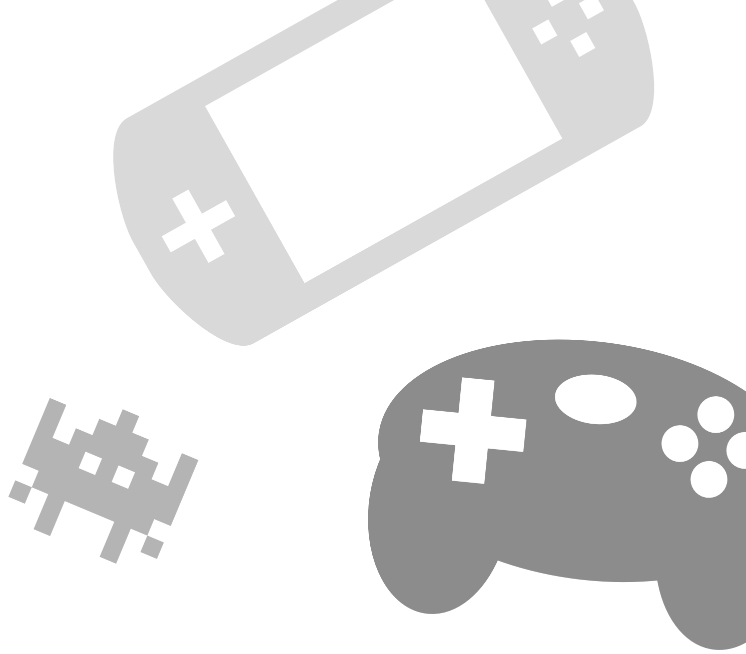
of U.S. consumers are "core" Content Originators, meaning they do all of the four activies

FREQUENCY OF STREAMING, RENTING AND PURCHASING MOVIES

Summary of Frequently/Occasionally (at least monthly) (%)	2014	Content Originator	Non-Content Originator
Online Streaming Service	56	88	53
Purchase/Rent via On Demand/Pay-Per-View	26	77	21
Rent Digital Download	21	72	17
Purchase Digital Download	23	71	18
Rent DVD/Blu-Ray	35	69	32
Purchase DVD/Blu-Ray	29	69	26

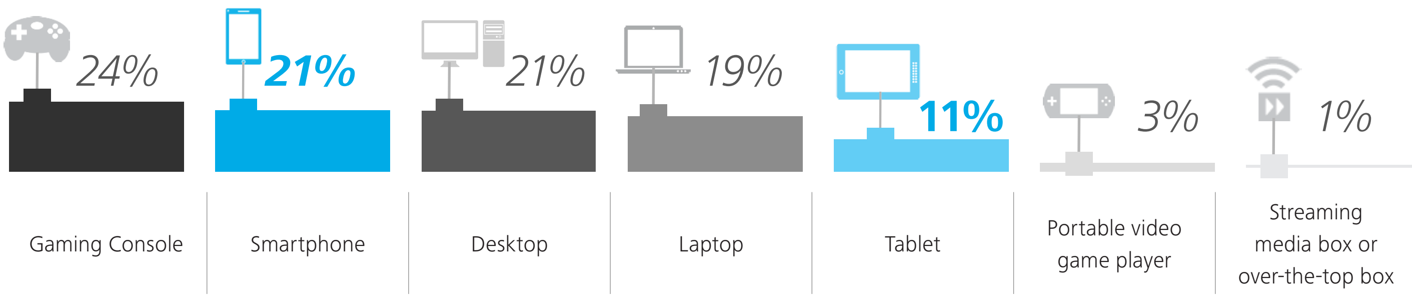
Question: *Thinking about how you watch movies, how frequently do you do each of the following?*

Personalization of gaming



SHARE OF TIME SPENT ON GAMING PLATFORMS

Almost 40% of U.S. Consumers and 54% of Trailing Millennials play video games on a daily or weekly basis. Gamers are spending a third of their playing time on mobile platforms (smartphones and tablets), perhaps because of the proliferation of casual games (e.g. puzzles and word games). Gaming consoles are increasingly being used for content consumption, especially watching/ streaming movies.



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

CONSOLE USAGE

Among Those With Consoles (%) activities performed on gaming console Summary of Top 3 Ranking	2013	Total 2014
Play video games	88	**86**
Watch movies (Blu-ray/DVD)	42	**48**
Stream TV/Movie content	32	**38**
Watch online content	26	**29**
Browse the Internet	16	**16**
Fitness training/education	16	**15**
Stream music	12	**15**
View home videos/photos	7	**7**

Question: *What top three activities are you doing on your gaming console?*

GAMING FREQUENCY

38% of U.S. consumers play games at least weekly

54% of Trailing Millennials play games at least weekly

Question: *How often do you play videogames (regardless of type, include mobile, console, phone-based, laptop and/or desktop, and tablet-based games)?*

Social media as news

MOST POPULAR NEWS PLATFORMS

While television is still the top mechanism for getting news, its importance has been decreasing over the last several years. Social media sites are becoming a primary source of news for Trailing Millennials.

Among Total U.S. Consumers (%)	2012	2013	Total 2014	Trailing Millennials (14-25)	Leading Millennials (26-31)	Generation X (32-48)	Baby Boomers (49-67)	Matures (68+)
Television	57	49	**48**	28	40	45	61	70
Online news sites not associated with a newspaper	17	19	**12**	15	10	13	11	4
Social media sites	4	9	**11**	26	15	10	3	1
Online version of newspapers	9	10	**10**	7	16	13	8	4
Print newspapers	6	6	**7**	3	4	5	10	15
Radio	3	4	**5**	5	3	7	5	2
Variety/talk shows	–	–	**2**	4	5	1	0	0
News aggregators	–	–	**2**	3	3	3	1	0
I do not follow the news	3	4	**4**	8	5	3	2	3

***Question**: Which of the following is your most frequently used mechanism to get news?*

About Deloitte's Digital Democracy Survey

- This is the ninth 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 ages 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 11/3/2014 to 11/19/2014, the survey employed an online methodology among 2,076 U.S. consumers.
- All data is weighted back to the most recent census data 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.

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