



# Digital Media Trends Survey, 18th edition

*March 2024*

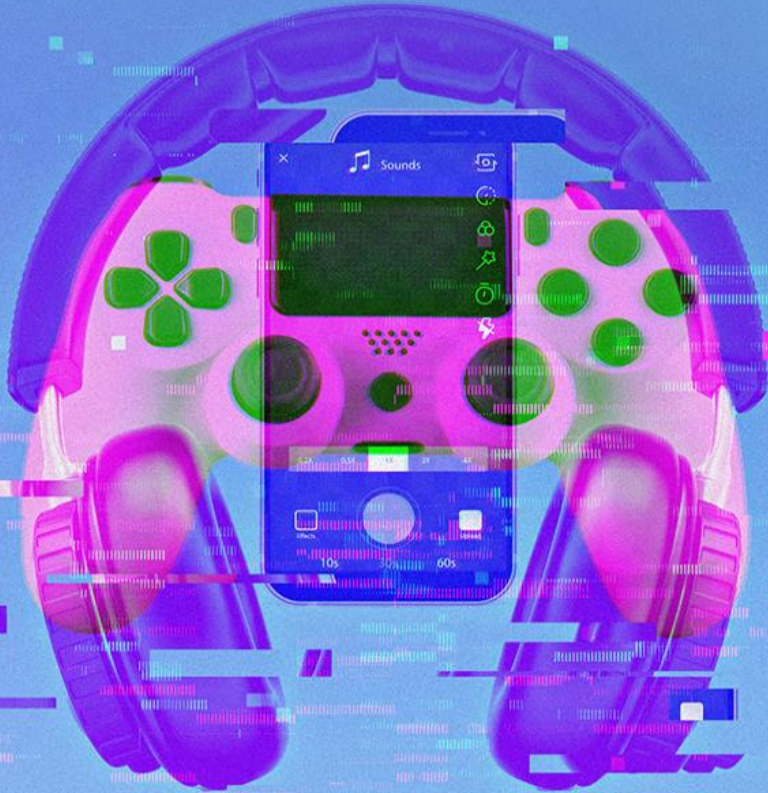
[www.deloitte.com/digitalmediatrends](https://www.deloitte.com/digitalmediatrends)





# About Deloitte's **Digital Media Trends Survey**

- Digital Media Trends, 18th edition, is conducted by Deloitte's Technology, Media and Telecommunications (TMT) practice.
- The survey provides insight into how people in the US, ages 14 and older, are interacting with media and entertainment offerings—including streaming video on-demand (SVOD), gaming, streaming music, user-generated content, social media & emerging technologies.
- The US survey was fielded by an independent research firm in October 2023 and employed an online methodology among 3,517 US consumers.
- All data is weighted back to the most recent Census data to give a representative view of consumer sentiment and behaviors.



## Gen Z

BORN 1997–2010

Age range 14–27



## Millennials

BORN 1983–1996

Age range 28–41



## Gen X

BORN 1966–1982

Age range 42–58



## Boomers

BORN 1947–1965

Age range 59–77



## Matures

BORN 1946 AND PRIOR

Age range 78+





# **Streaming video at a crossroads: Redesign yesterday's models or reinvent for tomorrow?**



# Simply repackaging the paid TV experience may not be enough to combat churn

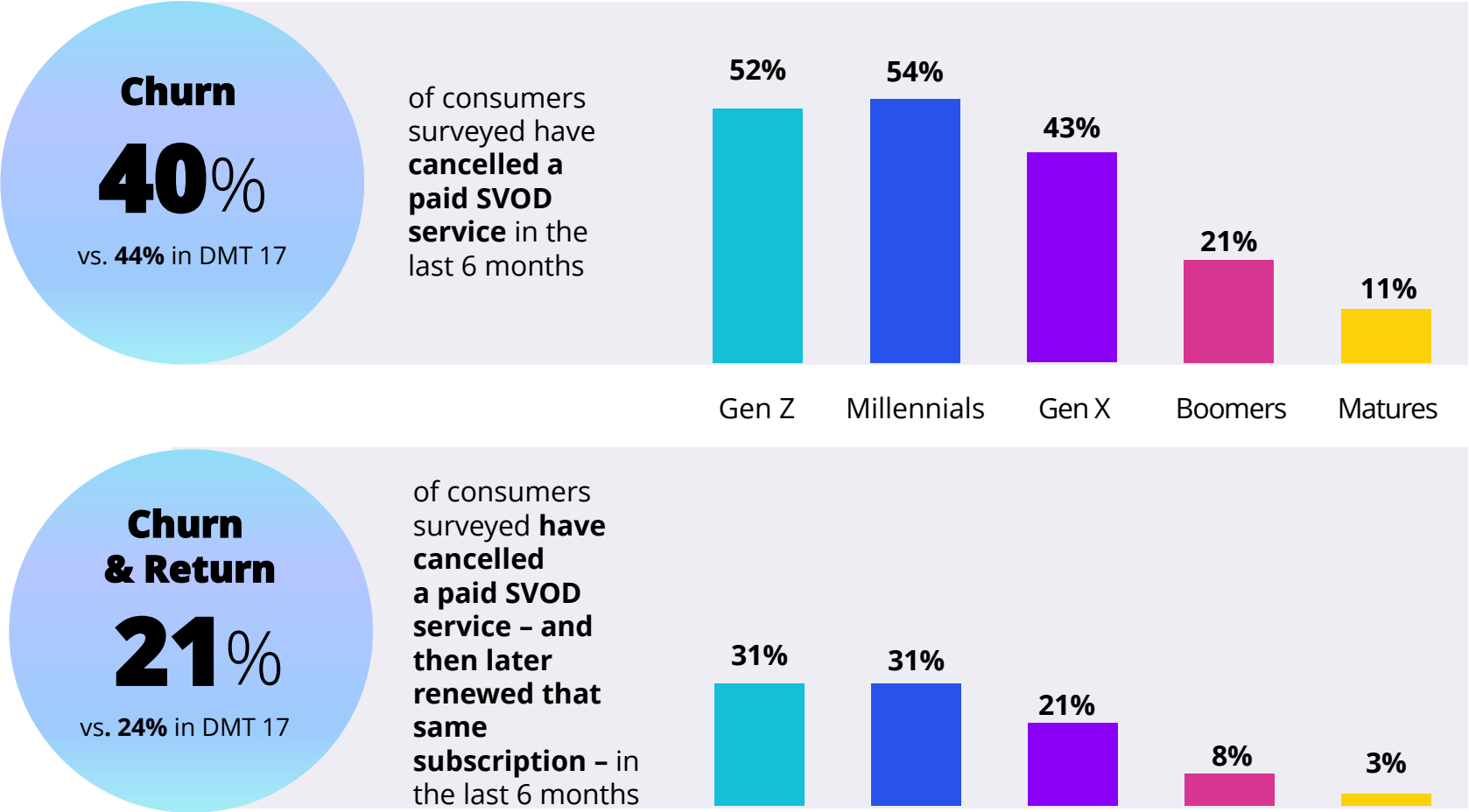
**SVOD subscribers  
Surveyed  
have an  
average of**

**4**

**services**

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**SVOD Penetration: 88%**



Note: N(All US consumers) = 3,517  
Source: 2024 Digital Media Trends, 18th Edition (March 2024)  
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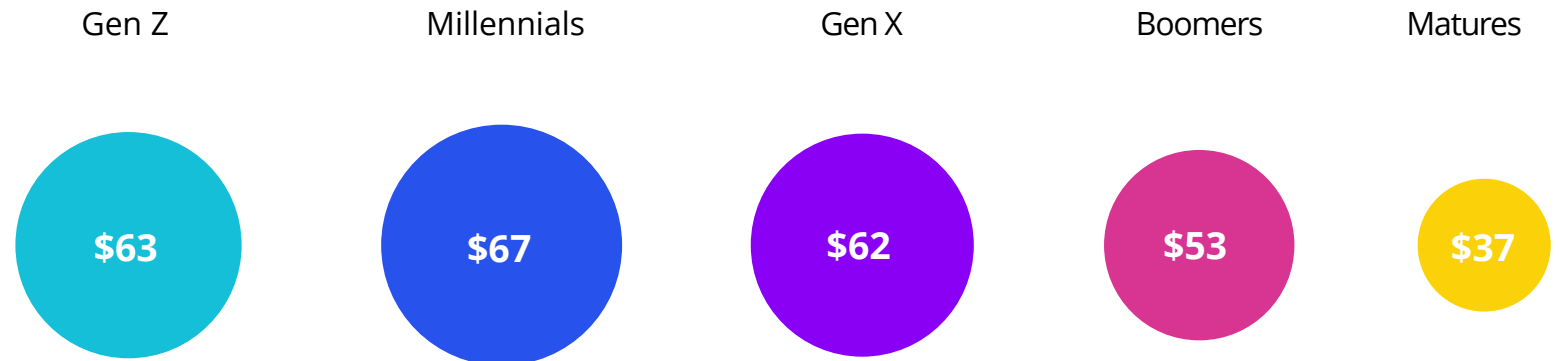
# Over a third of consumers believe streaming content isn't worth the money — and a \$5 price hike would cause almost half to cancel their favorite service

Average **amount spent per month** on all paid SVOD services combined

**\$61**

vs. **\$48** in DMT 17

(Among SVOD subscribers)



**36%**

of consumers surveyed think **SVOD content isn't worth the price**

**48%**

of consumers surveyed **would cancel** their favorite paid SVOD service **if the subscription cost increased by \$5 per month**

Note: N(All US consumers) = 3,517, N(SVOD subscribers) = 3,093

Source: 2024 Digital Media Trends, 18th Edition (March 2024)

# Almost half of consumers want content that's more personalized, easier to find

Percentage of consumers surveyed who agree with the following statements

I wish content recommendations on streaming video services were **more personalized** to me

**49%**

I would spend **more time** on streaming video services if it was **easier to find content**

**47%**

I spend **too much time** looking for something to watch on streaming video services

**46%**

Note: N(All US consumers) = 3,517

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# Bundling may provide an opportunity for streaming providers

Percentage of consumers surveyed who agree with the following statements

I would like a **bundle that lets me search for content** across all my streaming video services

**67%**

I would like the option to **mix-and-match a customized bundle** of streaming video services every month

**63%**

I would pay an additional fee for a service that allowed me to **access all my streaming video services in one place**

**45%**

Note: N(All US consumers) = 3,517

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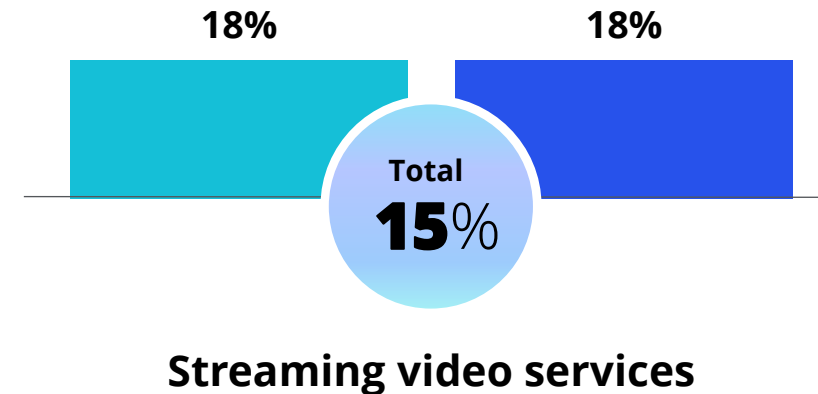
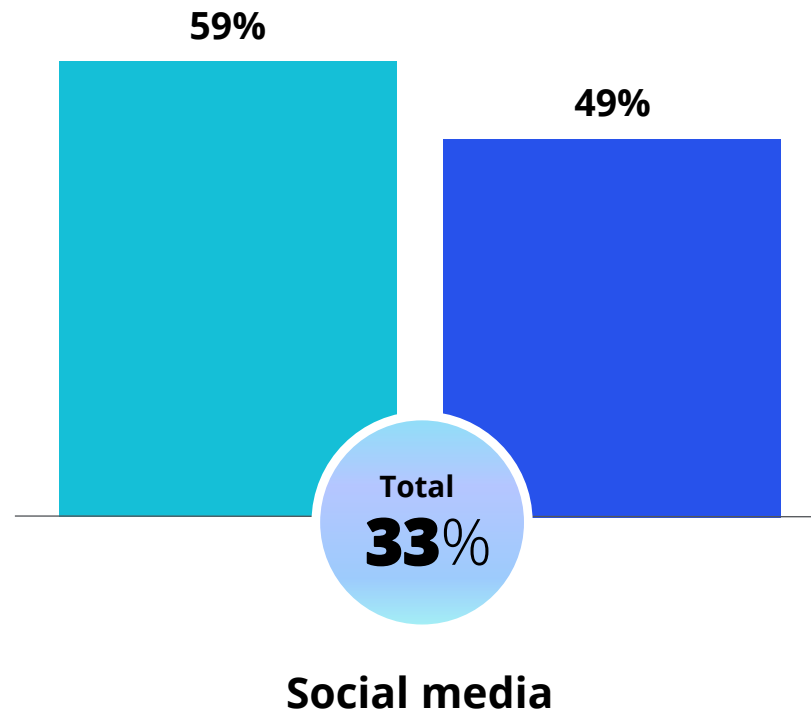


# For younger consumers, ads on social media influence purchasing decisions more than ads on streaming video services

Percentage of consumers surveyed who are influenced to purchase by ads or product reviews on the following

● Generation Z

● Millennials



Note: N(All US consumers) = 3,517

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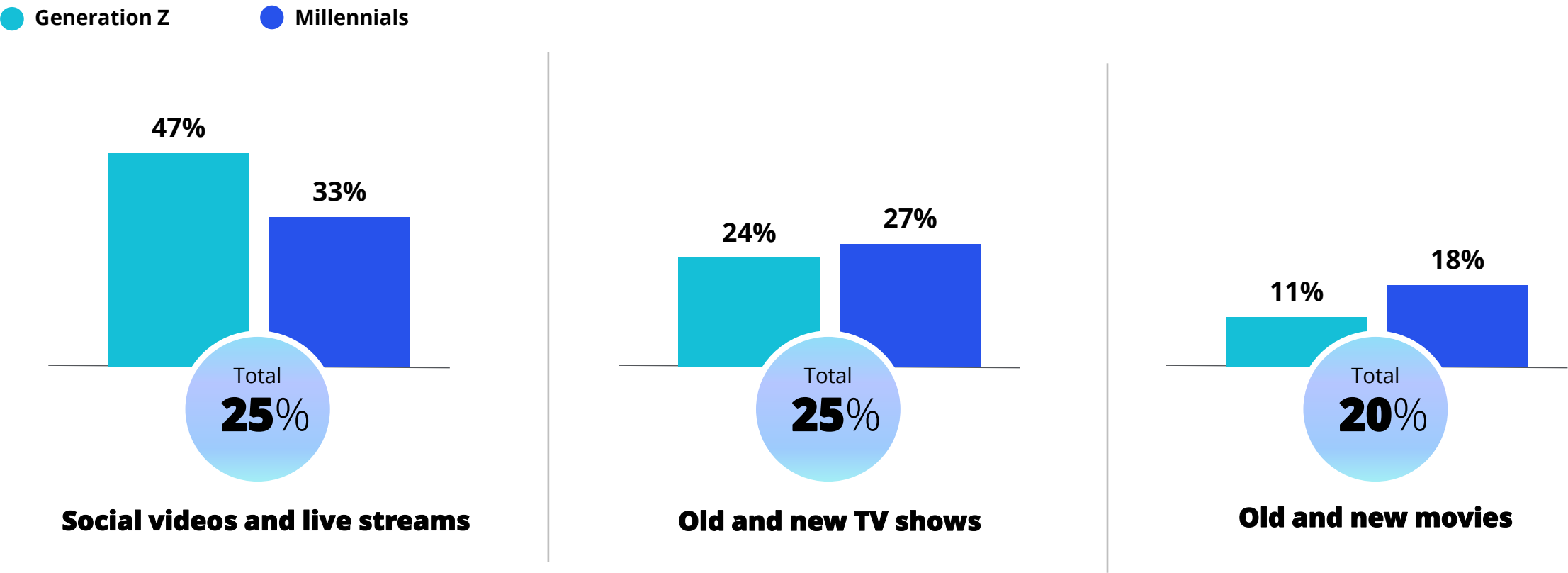
# **Social media and creators drive viewers to TV shows, movies, and games**





# Younger consumers prefer social media and live streams to TV shows and movies

Percentage of consumers surveyed who say the following is their preferred type of video content

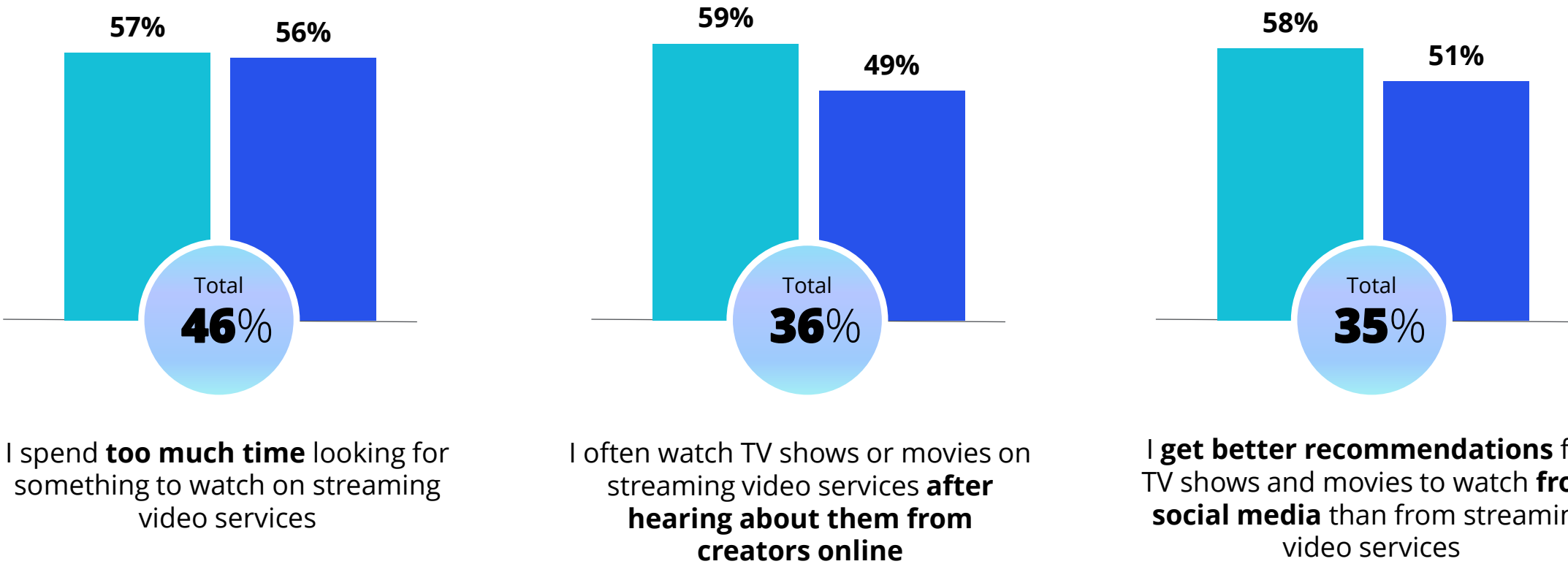


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# Many younger consumers rely on creators to navigate streaming content

Percentage of consumers surveyed who agree with the following statements

● Generation Z      ● Millennials



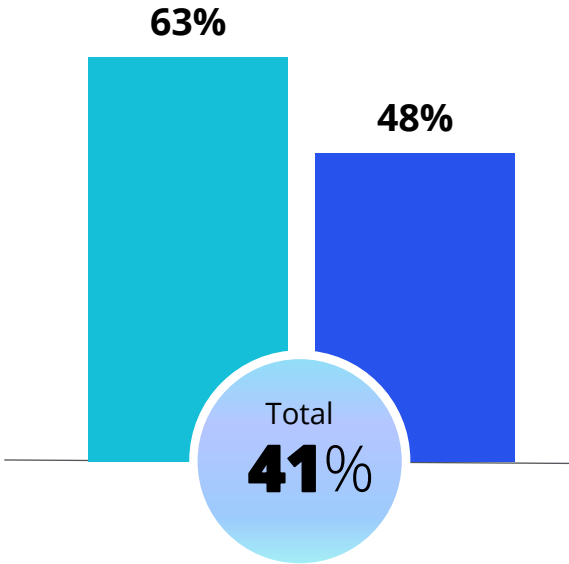
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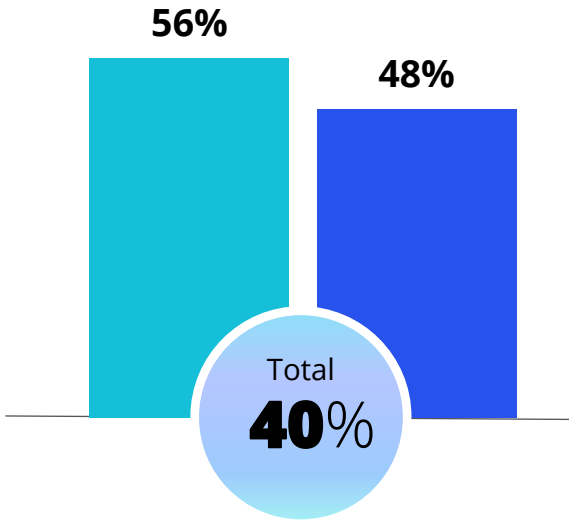
# Creators help many younger gamers discover and engage with gaming content

Percentage of gamers surveyed who agree with the following statements

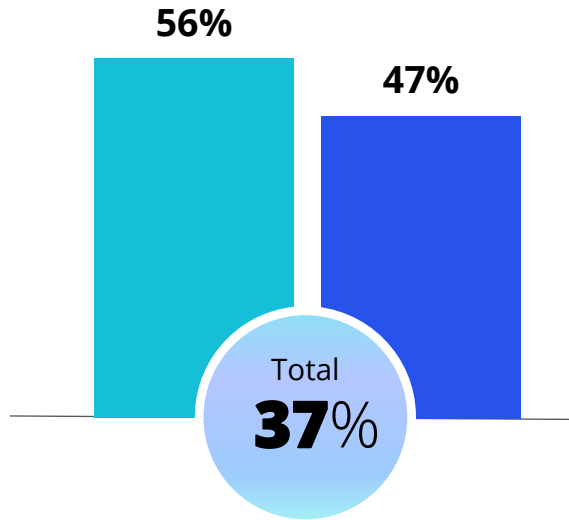
● Generation Z      ● Millennials



I often find out about **new game titles from live-streamers and content creators on social media**



I am more likely to trust a video game publisher **if my favorite gaming content creator has promoted a game by that publisher**



I have decided to play a video game because of a **recommendation from a gaming influencer**

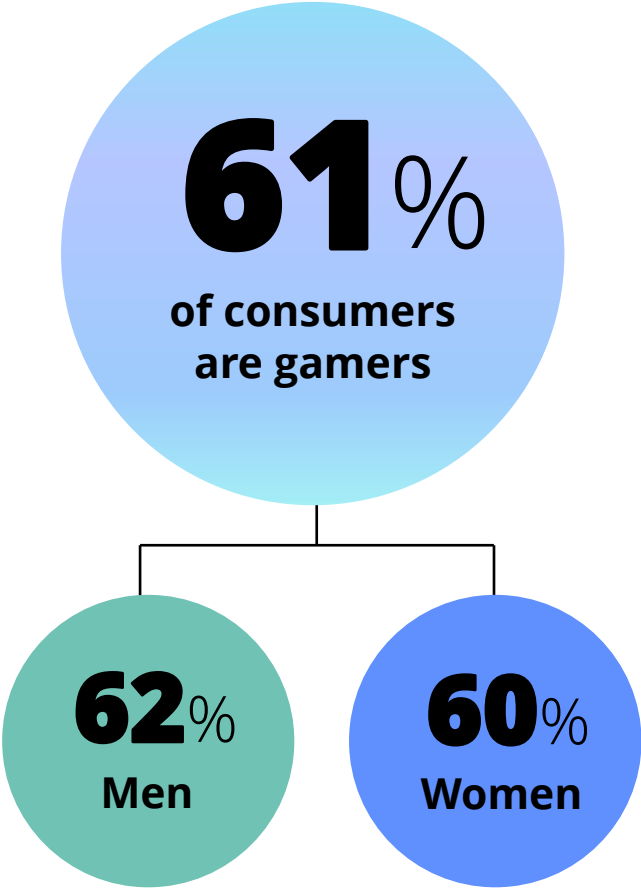
Note: N(All gamers) = 2,141  
Source: 2024 Digital Media Trends, 18th Edition (March 2024)

# For women playing video games, it's (still) a man's world





# Just as many women as men play video games, and gaming time has increased



Among all gamers surveyed



**9hrs**

Average gaming **time per week**  
vs. 8 hrs. in DMT 17



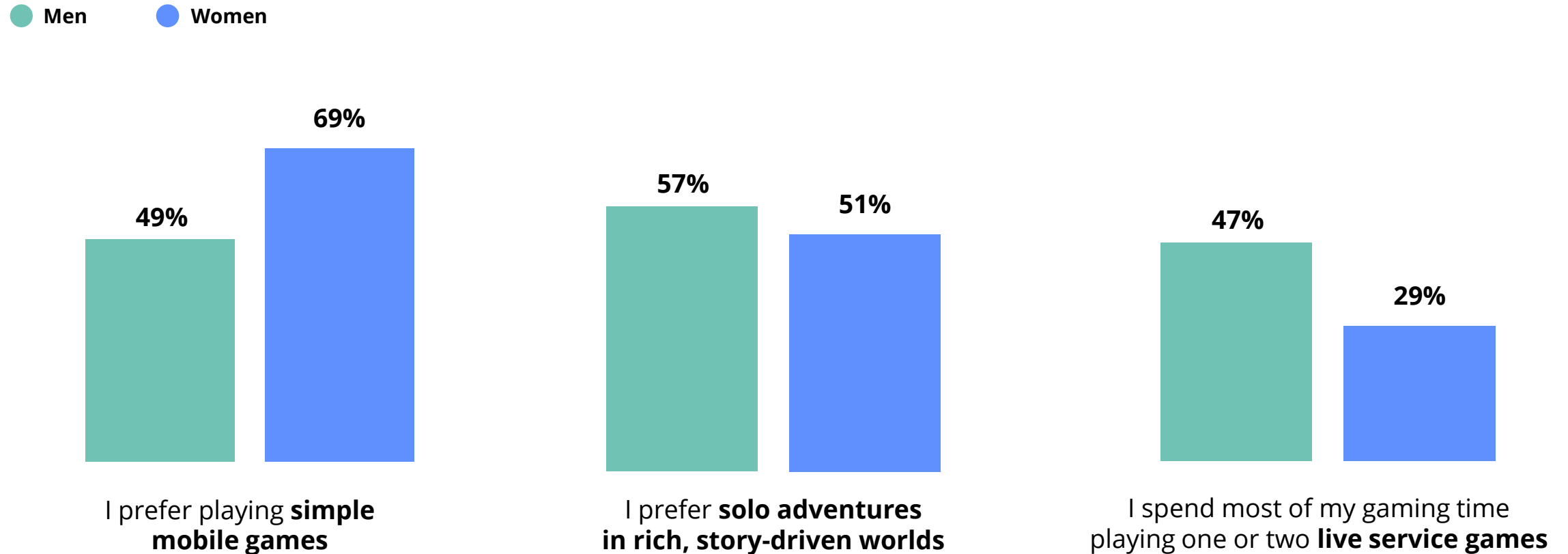
**60%**

of gamers overall have been  
**playing for more than 10 years**

Note: N(All US consumers) = 3,517, N(All gamers) = 2,141  
Source: 2024 Digital Media Trends, 18th Edition (March 2024)

# Men and women are drawn to different gaming experiences

Percentage of gamers surveyed who agree with the following statements



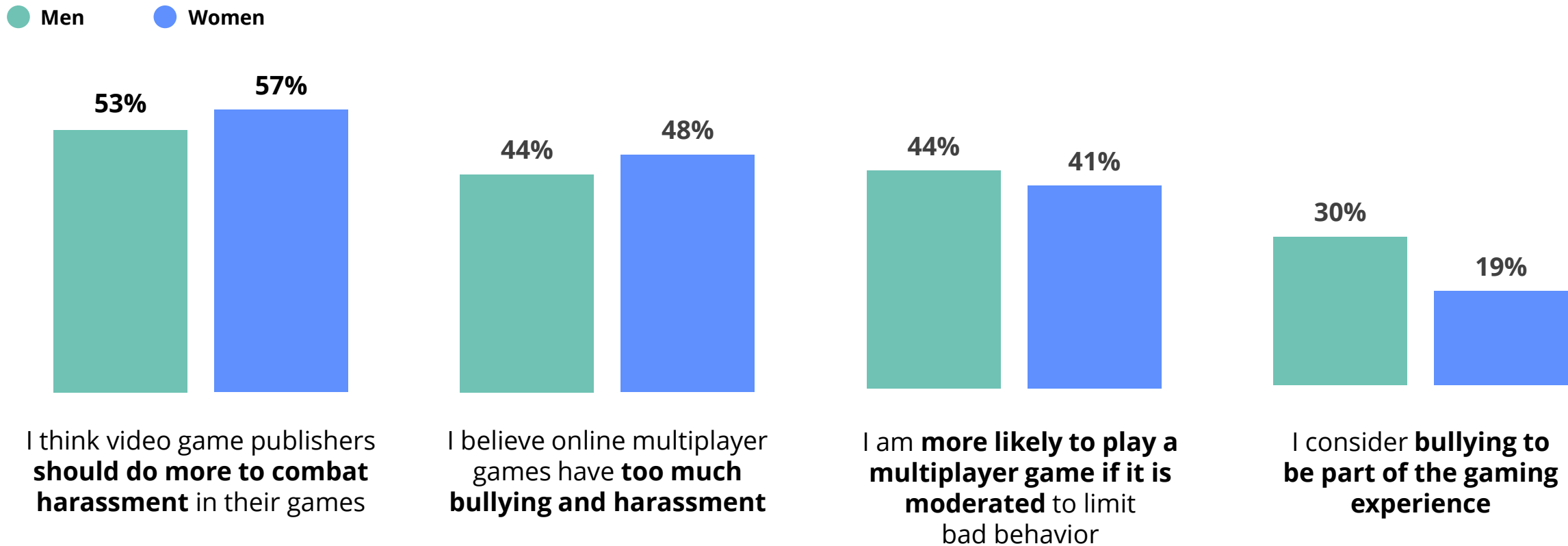
Note: N(All gamers) = 2,141

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# Bullying and harassment in gaming is often an issue, and many gamers think video game publishers should do more to combat harassment in their games

Percentage of gamers surveyed who agree with the following statements



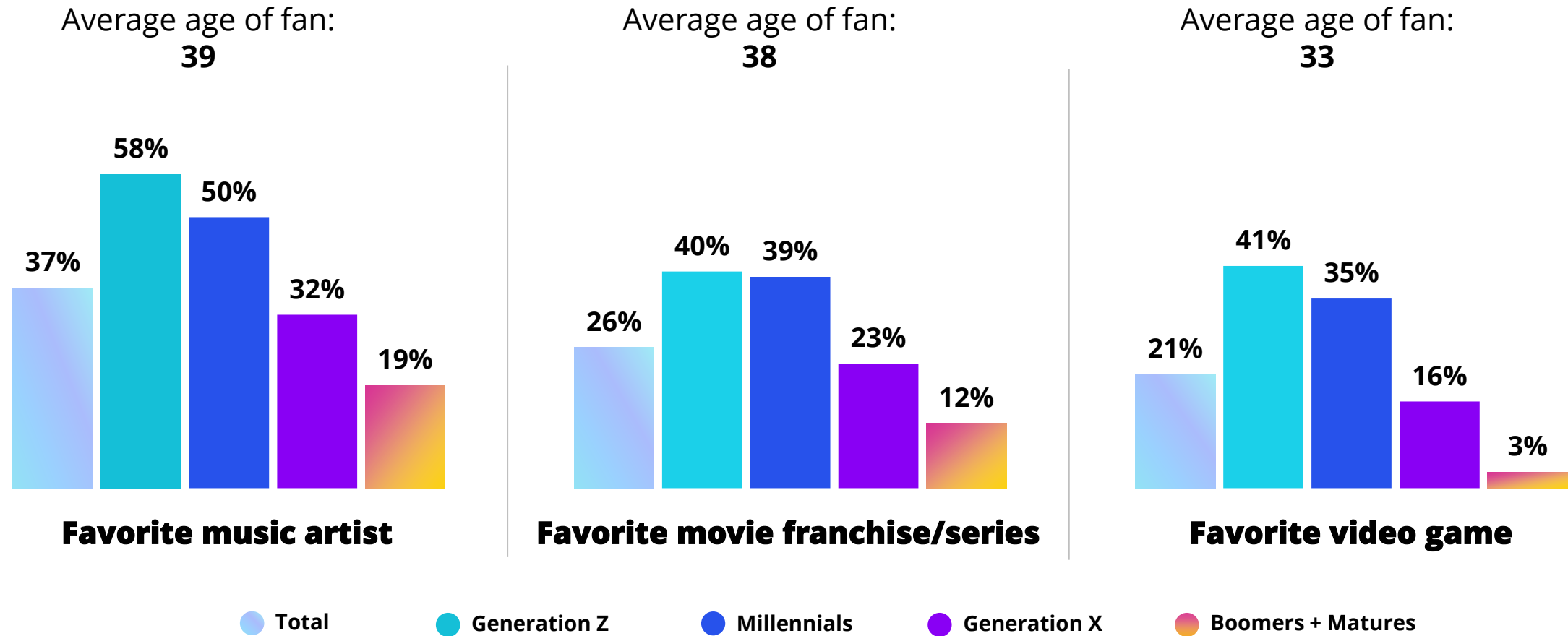
Note: N(All gamers) = 2,141  
Source: 2024 Digital Media Trends, 18th Edition (March 2024)



# Beyond mass appeal: The untapped potential of fandom

# Younger consumers are more likely to say their fandoms are important to their identity

Percentage of consumers surveyed who say their fandoms for the following are important to their identity



Note: N(All US consumers) = 3,517

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# Fandom is uniquely tied to consumers' identities and can influence spending habits

**37%**

of consumers surveyed say their fandom for their favorite **music artist** is important to their identity

*And they are more likely to....*

- Pay for a streaming music service
- Download music
- Follow musicians on social media
- Buy merchandise

**26%**

of consumers surveyed say their fandom for their **movie franchise/series** is important to their identity

*And they are more likely to....*

- See a movie in theater
- Attend a fan convention
- Go to a theme park or live experience
- Buy merchandise

**21%**

of consumers surveyed say their fandom for their favorite **video game** is important to their identity

*And they are more likely to....*

- Pay for a gaming service
- Spend more hours per week playing
- Play to meet up with friends
- Have more friends in game worlds than in real life

**10%**

of consumers surveyed are **"M&E superfans"** — those who say their fandom for their favorite music artist, sports team, TV series, movie franchise, and video game are all important to their identity

*And they are more likely to....*

- Pay for an SVOD service
- Be gamers
- Have a paid gaming service
- Have a paid streaming music service
- Use social media or messaging services

Note: N(All US consumers) = 3,517

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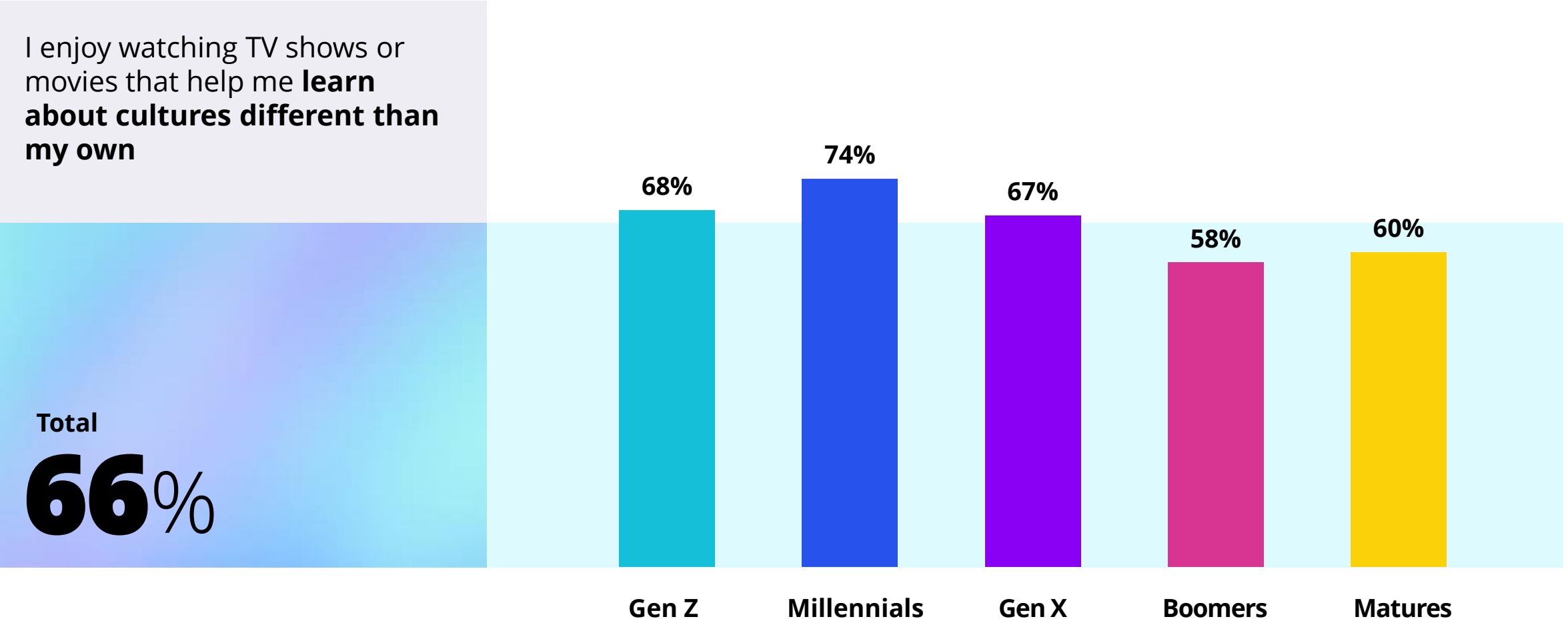
**Audiences are becoming increasingly diverse, and they expect content that reflects the world around them**





# Consumers across generations enjoy watching TV shows and movies to learn about different cultures

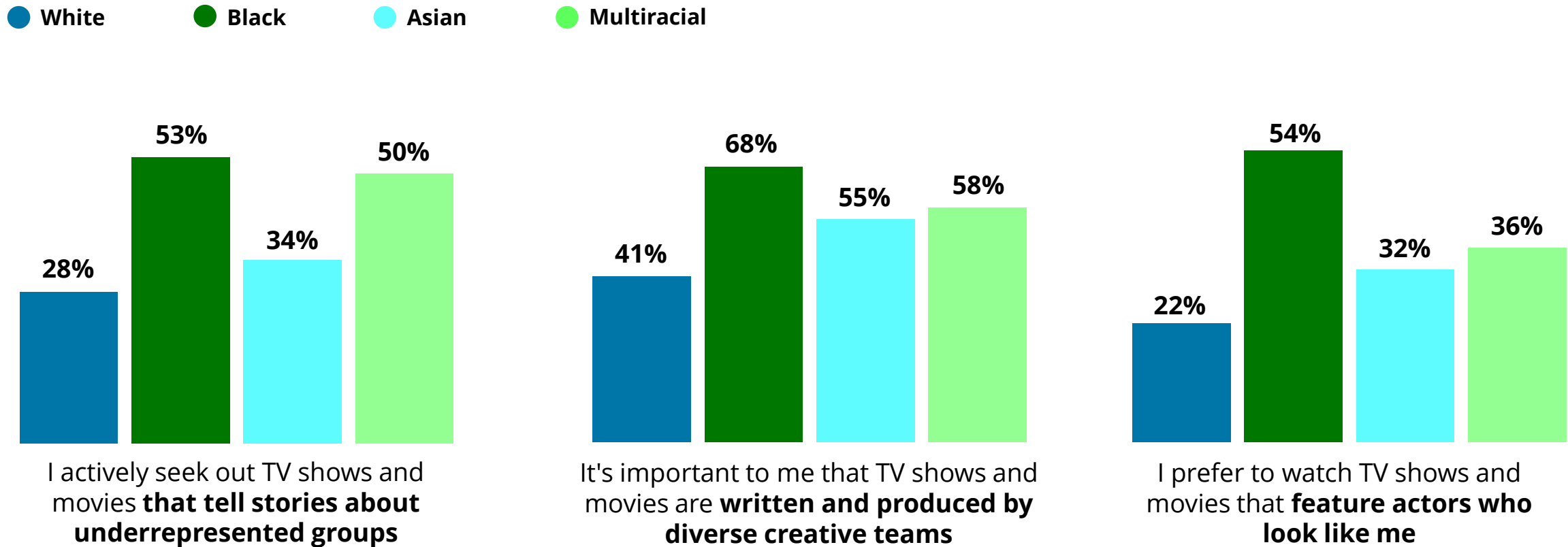
Percentage of consumers surveyed who agree with the following statement



Note: N(All US consumers) = 3,517  
Source: 2024 Digital Media Trends, 18th Edition (March 2024)

# Black consumers are more likely to prefer TV shows and movies that feature actors who look like them — and the team behind the scenes matters too

Percentage of consumers surveyed who agree with the following statements

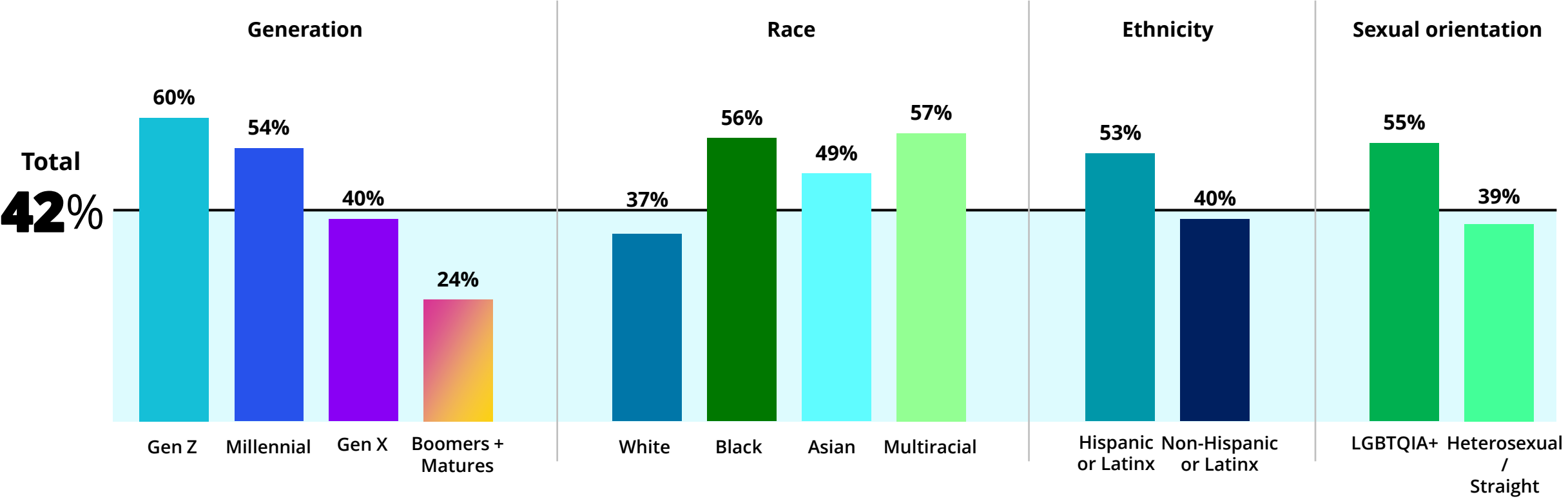


Note: N(All US consumers) = 3,517  
Source: 2024 Digital Media Trends, 18th Edition (March 2024)

# Younger generations are more likely to think videos on social media are more diverse than TV shows and movies

Percentage of consumers surveyed who agree with the following statement

**I find videos on social media to be much more diverse than TV shows and movies**



Note: N(All US consumers) = 3,517  
Source: 2024 Digital Media Trends, 18th Edition (March 2024)





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