



ACTIVATE CONSULTING TECHNOLOGY & MEDIA OUTLOOK 2025 **SUPER USERS**

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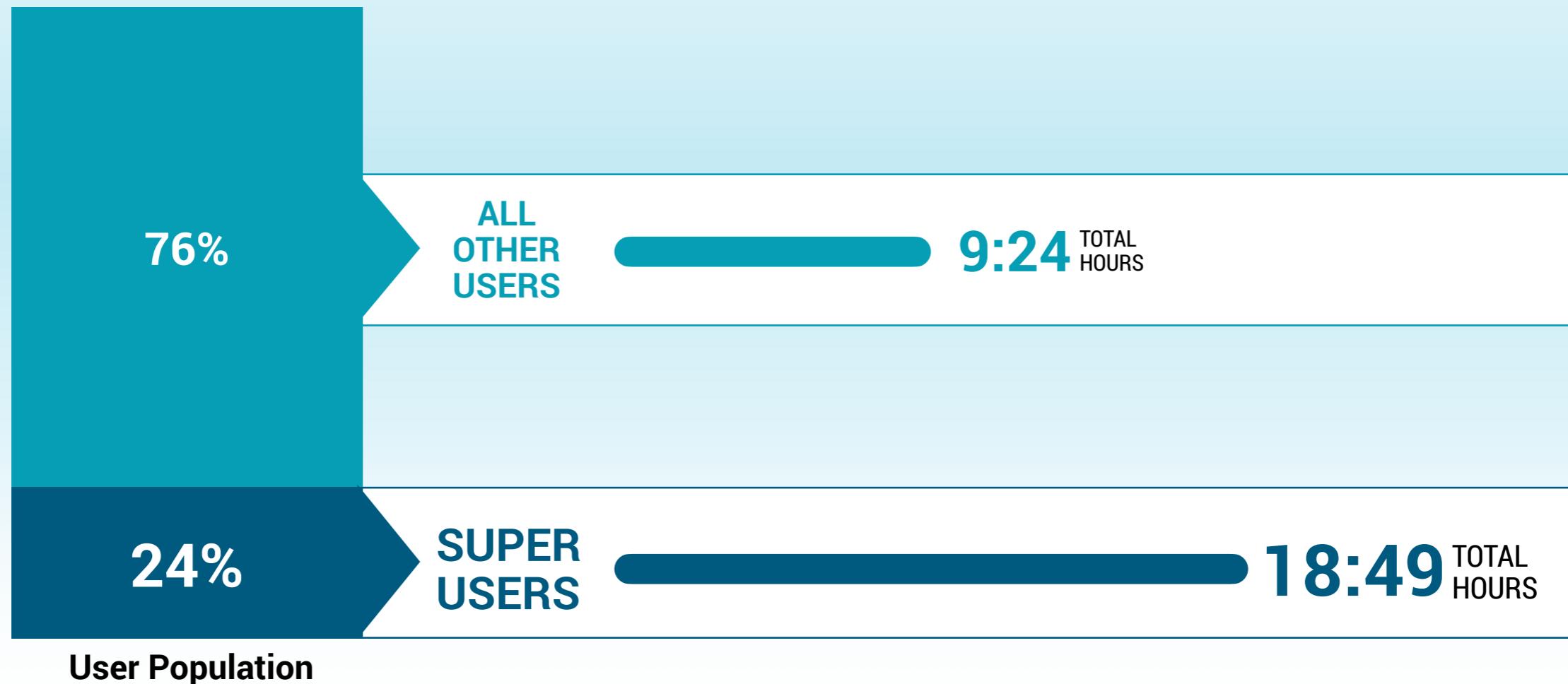


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Super Users are an important segment that represents less than 25% of the population but accounts for a disproportionately high share of time spent with technology and media

AVERAGE DAILY TIME SPEND WITH TECHNOLOGY AND MEDIA PER USER¹, U.S., 2024E, % ADULTS AGED 18+ / HOURS:MINUTES



1. Includes time spent watching video, playing video games, listening to music, listening to or watching podcasts, and using messaging / social media services.

Sources: Activate analysis, Activate 2024 Consumer Technology & Media Research Study (n = 4,004), Company filings, Comscore, Conviva, data.ai, eMarketer, Gallup, GWI, Interactive Advertising Bureau, Music Biz, National Sleep Foundation, Newzoo, Nielsen, NPD Group, Omdia, Pew Research Center, PricewaterhouseCoopers, U.S. Bureau of Labor Statistics, YouGov

Compared to all other users, Super Users spend substantially more time engaging in all major technology and media activities

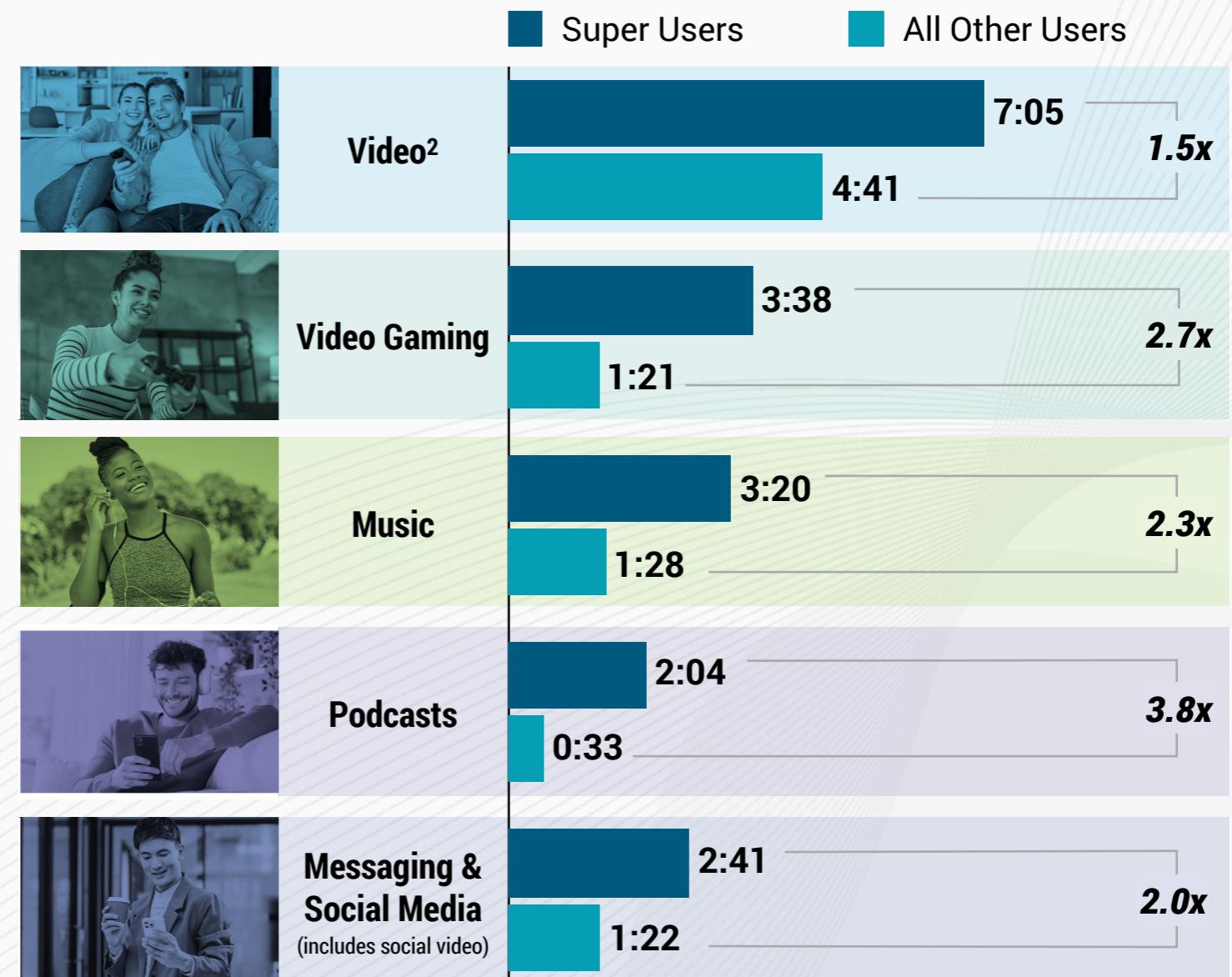
AVERAGE DAILY TIME SPEND PER USER BY TECHNOLOGY AND MEDIA TYPE, U.S., 2024E, HOURS:MINUTES

SUPER USERS



ACTIVATE CONSUMER INSIGHTS

ALL OTHER USERS



1. Figures do not sum due to rounding. 2. "Video" includes YouTube.

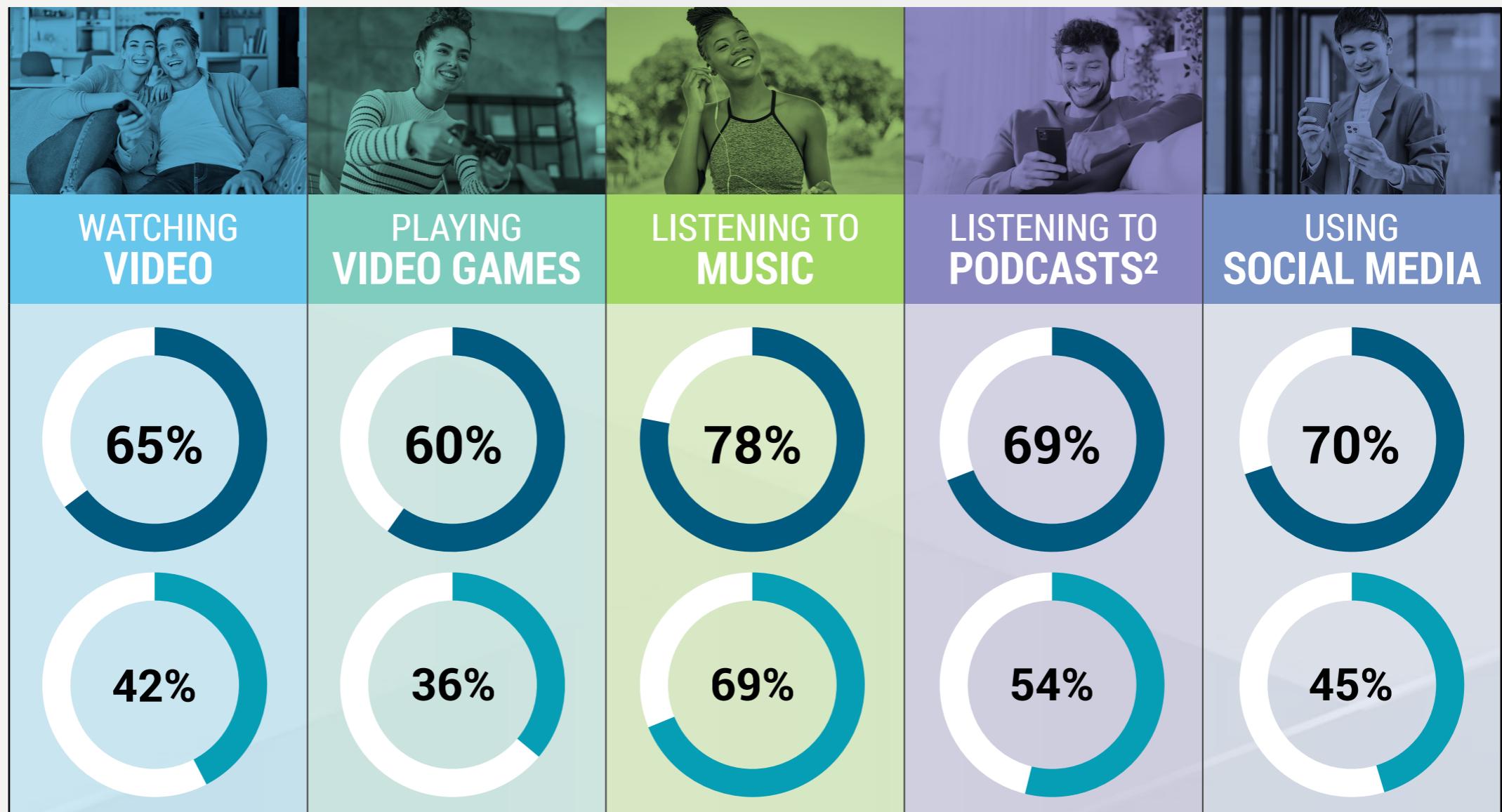
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Across major activities, Super Users are much more likely to multi-task

MULTI-TASKING¹ BEHAVIOR BY TECHNOLOGY AND MEDIA ACTIVITY, U.S., 2024, % ADULTS AGED 18+ WHO ENGAGE IN EACH ACTIVITY



CONSUMERS WHO MULTI-TASK¹ ALL, ALMOST ALL, OR MOST OF THE TIME WHEN...



1. "Multi-tasking" is defined as simultaneously doing another activity, such as working, cleaning, cooking, or exercising. 2. Includes listening to or watching podcasts.

Sources: Activate analysis, Activate 2024 Consumer Technology & Media Research Study (n = 4,004)

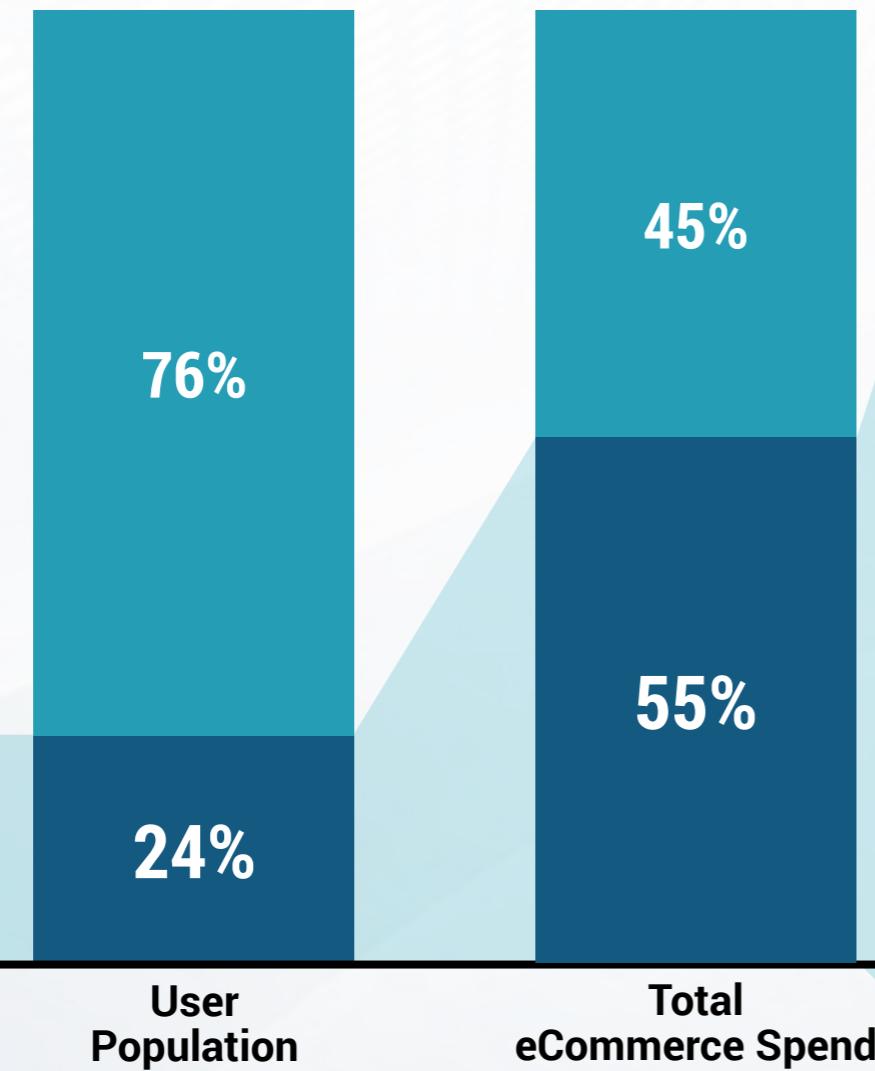
Super Users account for a disproportionately high share of total eCommerce spend while also over-indexing on emerging eCommerce behaviors

ECOMMERCE SPEND, U.S., 2024,
% ADULTS AGED 18+ / % TOTAL ECOMMERCE SPEND



ALL
OTHER
USERS

SUPER
USERS



PARTICIPATION IN EMERGING ECOMMERCE BEHAVIORS IN THE LAST 12 MONTHS, U.S., 2024,
SUPER USERS INDEXED TO ALL OTHER USERS

Super Users over-index on several emerging eCommerce activities

IMMERSIVE EXPERIENCES

3.8x

LIVESTREAM SHOPPING

3.6x

VIRTUAL TRY-ON

3.3x

As likely to have visited a brand's immersive virtual world (e.g. Vans World on Roblox, Nike's Airphoria Island on Fortnite)

As likely to have bought a product through a livestream shopping event

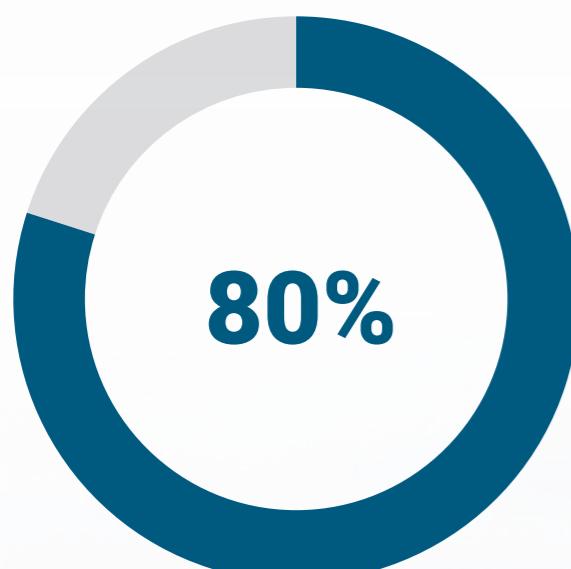
As likely to have used an AR-powered virtual try-on feature (e.g. to test clothing, footwear, accessories, beauty products)

Super Users are significantly more likely to be early adopters of new technology/devices

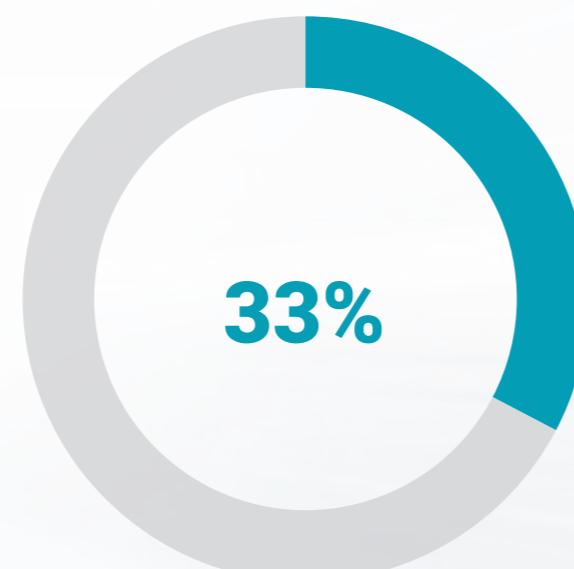
PROPENSITY TO BE AMONG THE FIRST FEW TO BUY/USE NEW TECHNOLOGY/DEVICES¹, U.S., 2024, % ADULTS AGED 18+



SHARE OF ADULTS AGED 18+ WHO ARE USUALLY AMONG THE FIRST FEW TO BUY/USE NEW TECHNOLOGY/DEVICES¹



SUPER USERS

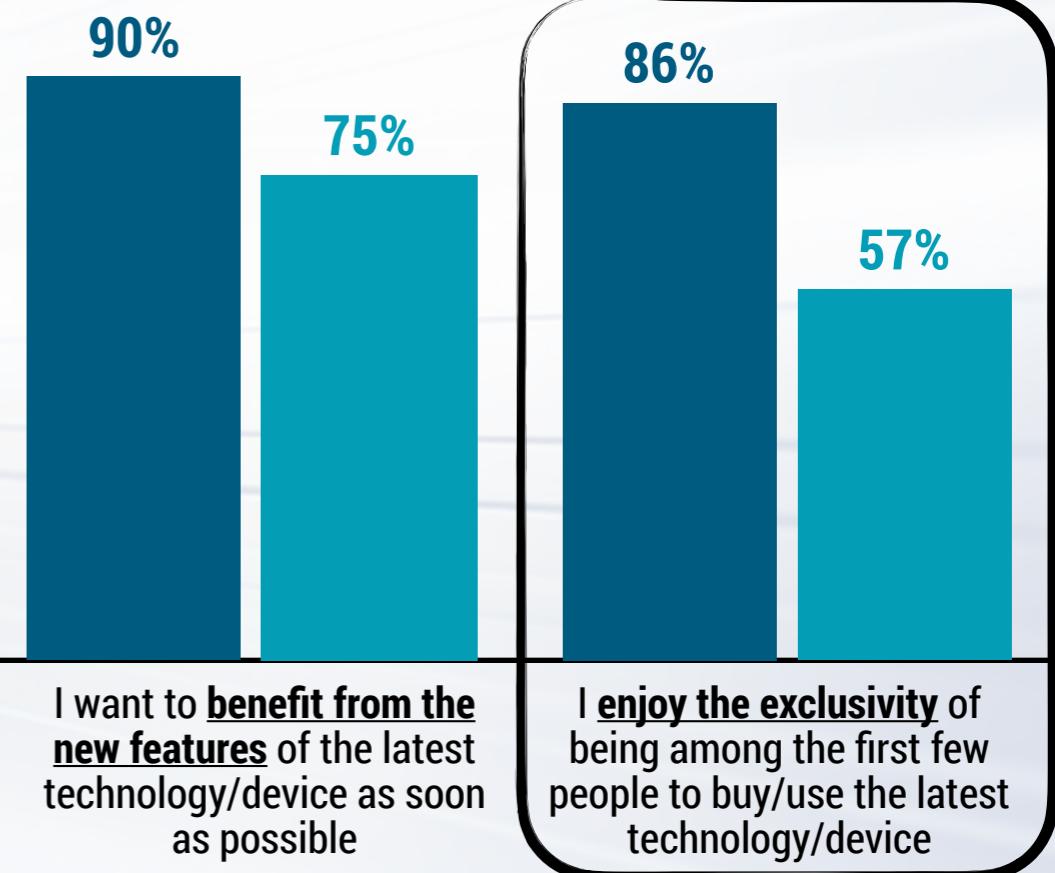


ALL OTHER USERS

REASONS FOR EARLY ADOPTION OF TECHNOLOGY/DEVICES, U.S., 2024, % ADULTS AGED 18+ WHO ARE USUALLY AMONG THE FIRST FEW TO BUY/USE NEW TECHNOLOGY/DEVICES¹

% Super Users % All Other Users

While most early adopters are driven by the ability to benefit from new features, Super Users are also significantly motivated by the exclusivity of being an early adopter



Super Users are in the vanguard of generative AI adoption

USAGE OF GENERATIVE AI PLATFORMS, U.S., 2024, SUPER USERS INDEXED TO ALL OTHER USERS



2.9x

AS LIKELY TO USE
A GENERATIVE AI PLATFORM
AT LEAST ONCE PER MONTH

Super Users are...

3.8x

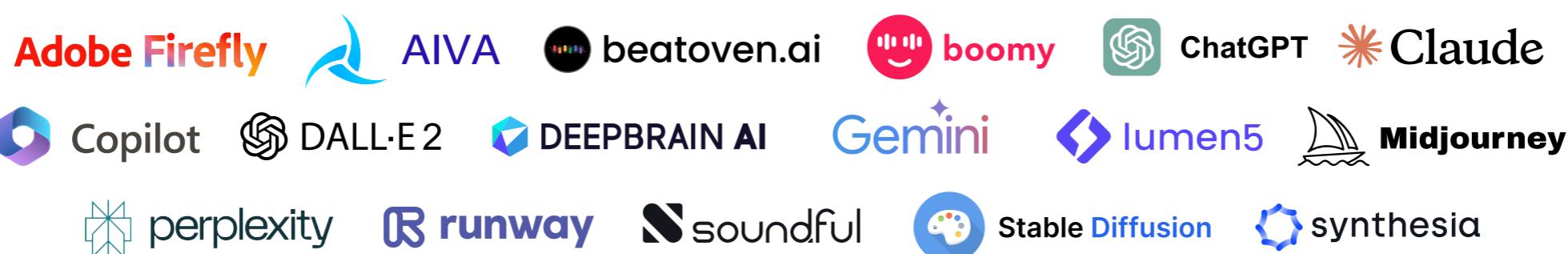
AS LIKELY TO HAVE CREATED
IMAGES USING A GENERATIVE AI
PLATFORM IN THE LAST 12
MONTHS

4.0x

AS LIKELY TO USE GENERATIVE AI
AS A FIRST STOP FOR ONLINE
SEARCH¹

...as all other users

EXAMPLE GENERATIVE AI PLATFORMS TESTED IN OUR RESEARCH



1. "Using generative AI as a first stop for online search" is defined as typically starting the search process with a generative AI search service when looking for information online.

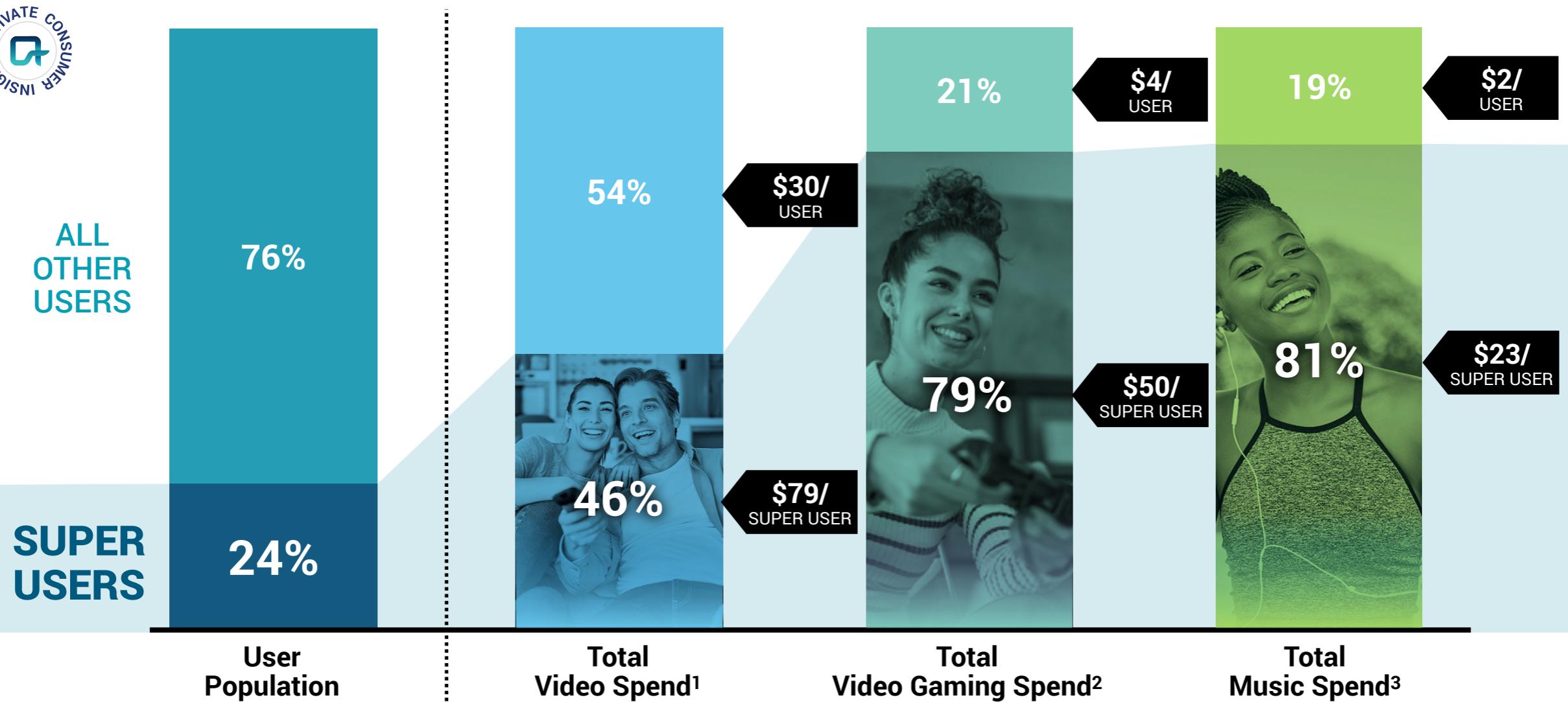
Sources: Activate analysis, Activate 2024 Consumer Technology & Media Research Study (n = 4,004)

Super Users consistently spend more dollars on technology and media than all other users



MONTHLY DOLLAR SPEND BY TECHNOLOGY AND MEDIA TYPE,

U.S., 2024E, % ADULTS AGED 18+ / % TOTAL SPEND BY TECHNOLOGY AND MEDIA TYPE / USD PER USER



1. Includes spend on all videos and video services, including traditional/virtual Pay TV, video streaming subscription services, and video purchases/rentals.
 2. Includes spend on video games and other video gaming purchases (e.g. in-game purchases, video gaming subscription services) across all devices. Excludes spend on gaming devices and accessories.
 3. Includes spend on music and music services.
- Sources: Activate analysis, Activate 2024 Consumer Technology & Media Research Study (n = 4,004), eMarketer, Goldman Sachs, Grand View Research, IFPI, Newzoo, Omdia, PricewaterhouseCoopers, Recording Industry Association of America, SiriusXM, Statista

Super Users are more willing to share their data with technology and media companies in exchange for benefits

CONSUMER WILLINGNESS TO SHARE DATA WITH TECHNOLOGY AND MEDIA COMPANIES, U.S., 2024, % ADULTS AGED 18+



% Super Users % All Other Users

Comfortable sharing data with technology and media companies
 (in exchange for more personalized/relevant recommendations and ads or rewards/discounts)

82%



48%

SHARING OF PERSONAL INFORMATION WITH ONLINE RETAILERS OVER THE LAST 12 MONTHS, U.S., 2024, % ONLINE SHOPPERS¹

OVER THE LAST 12 MONTHS, I...

Shared my email address and/or phone number to make an account with an online retailer for a personalized experience
 (e.g. the ability to create wish lists, track orders, save checkout information)

72%

40%

Allowed an online retailer to track my website/app activity to receive personalized ads
 (e.g. accepted cookies on a website)

62%

28%

Completed an online retailer's quiz to receive personalized item recommendations
 (e.g. clothing size, mattress type, skincare product, computer model)

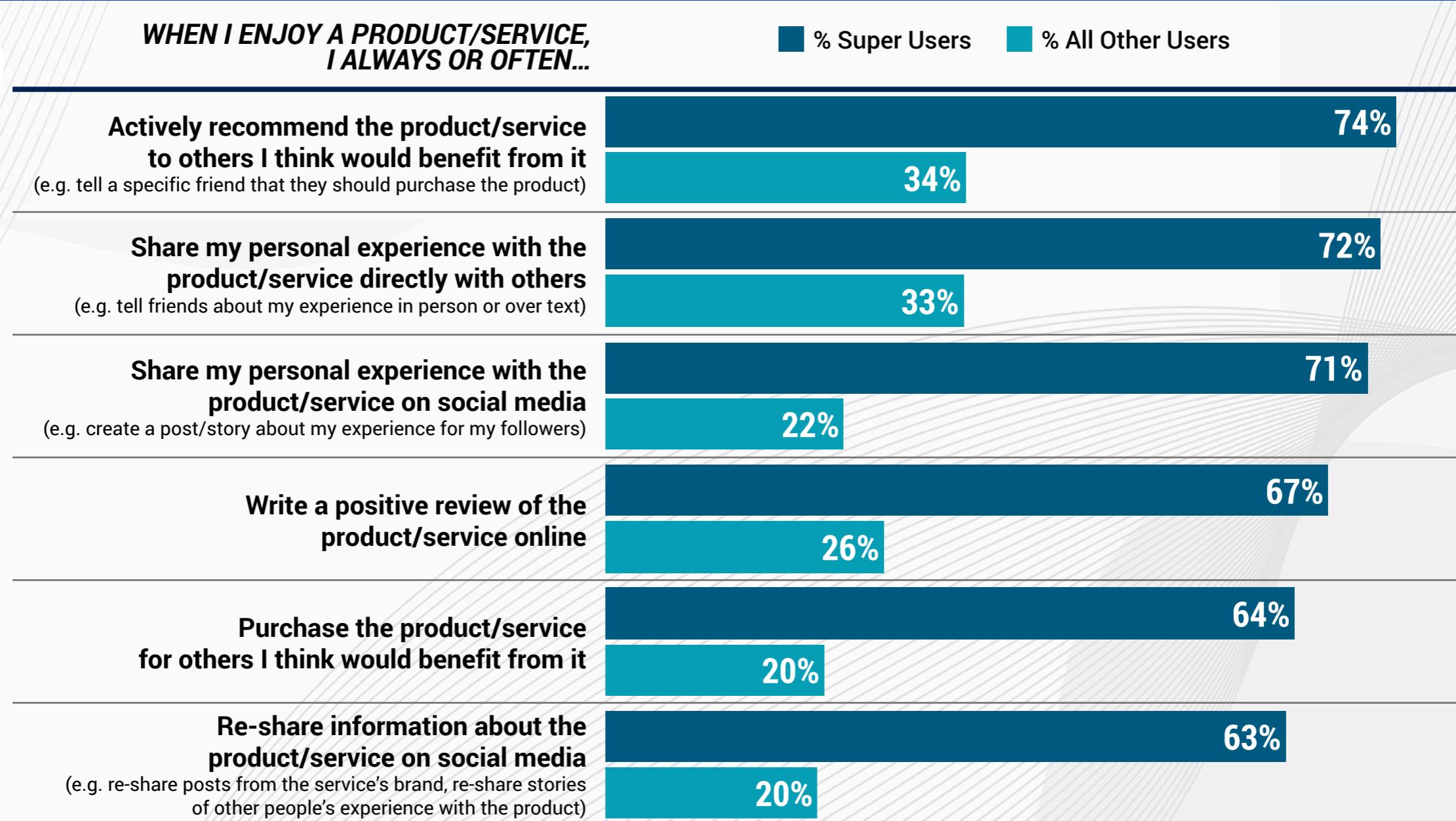
60%

22%

Super Users are significantly more likely to be brand amplifiers, sharing their experiences and recommending products/services

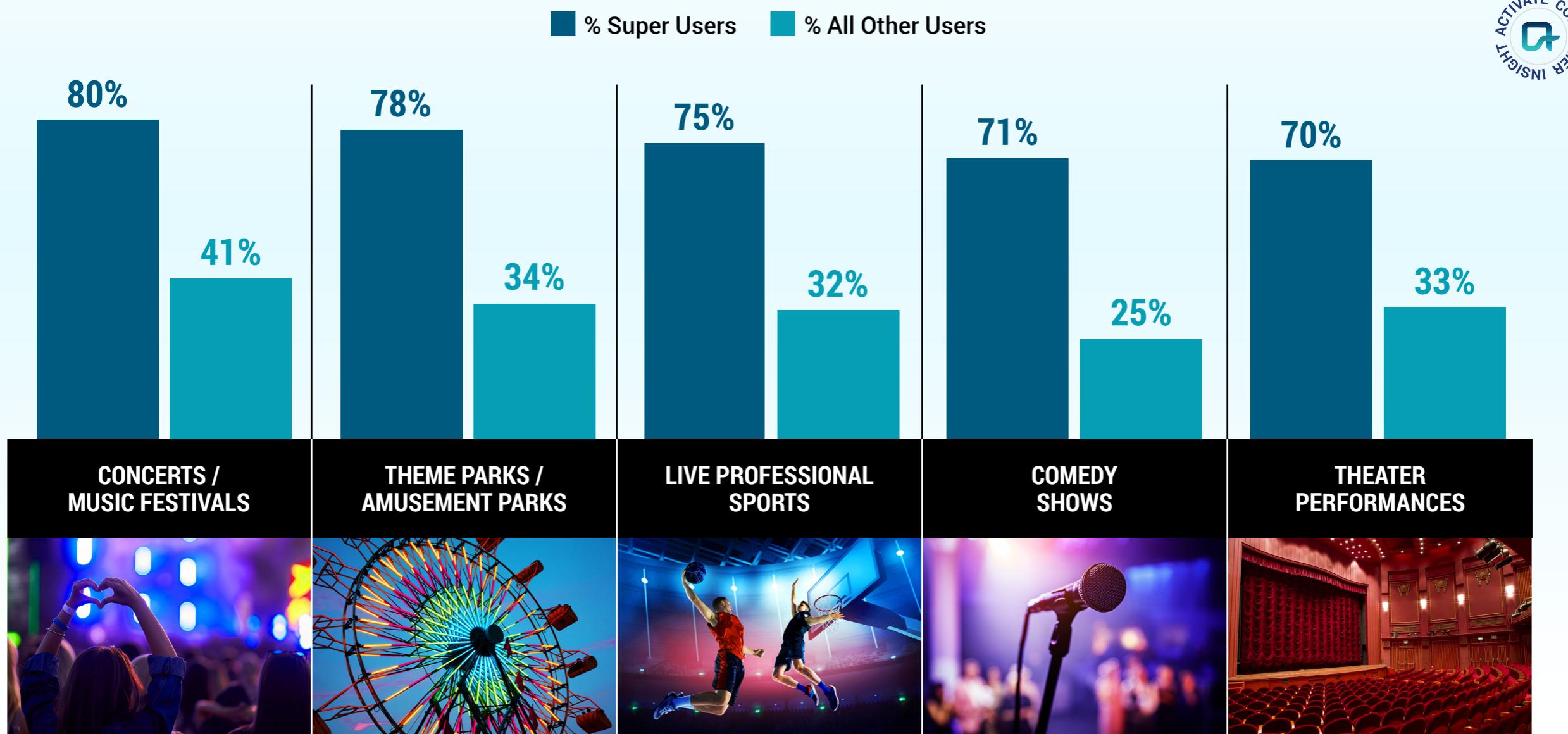


BRAND ADVOCACY BEHAVIORS, U.S., 2024, % ADULTS AGED 18+



Super Users are more likely to attend live events and experiences

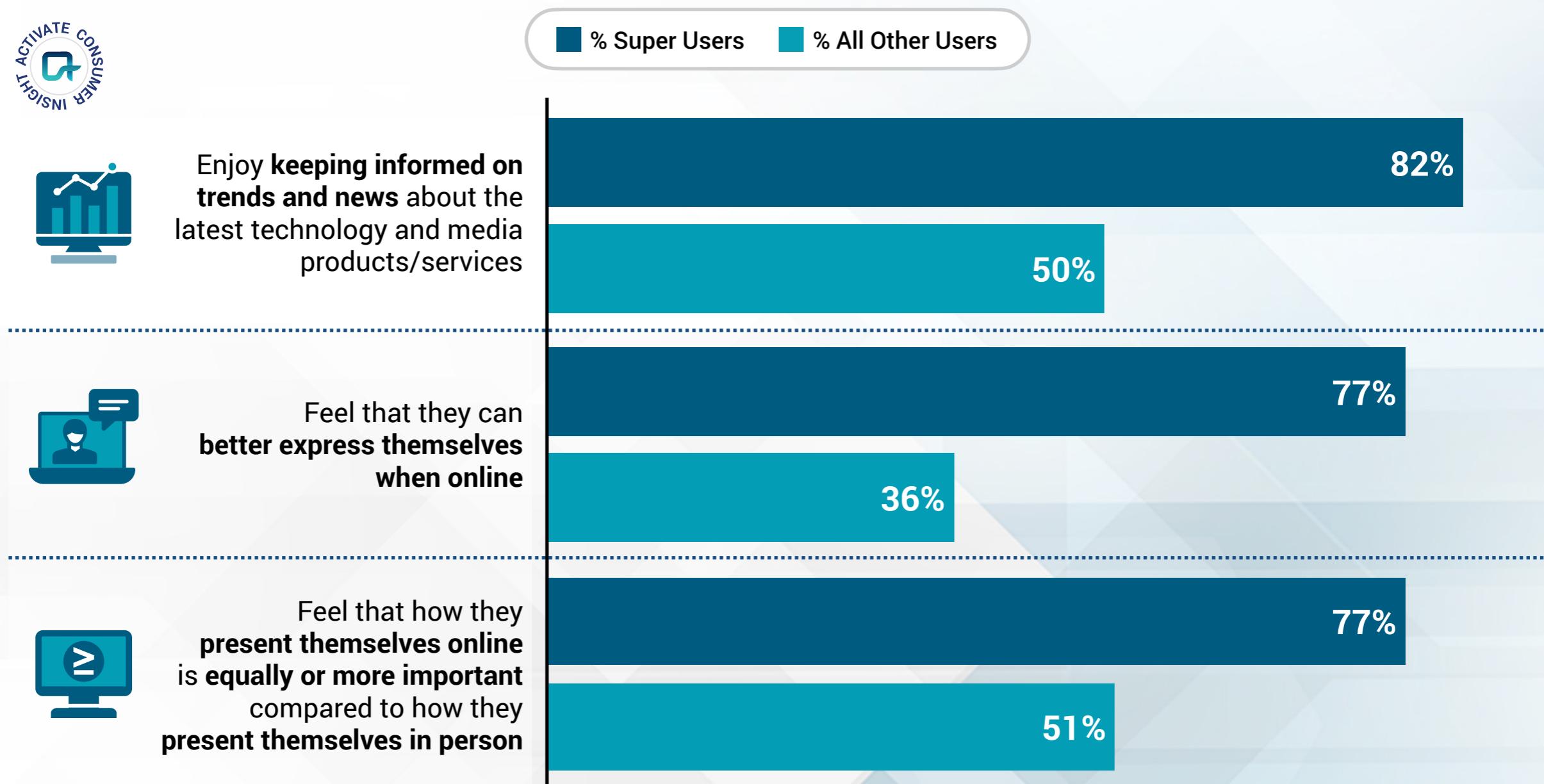
LIVE EVENT / ACTIVITY ATTENDANCE IN THE LAST 12 MONTHS BY TYPE¹, U.S., 2024, % ADULTS AGED 18+



Super Users are more comfortable with their digital identities

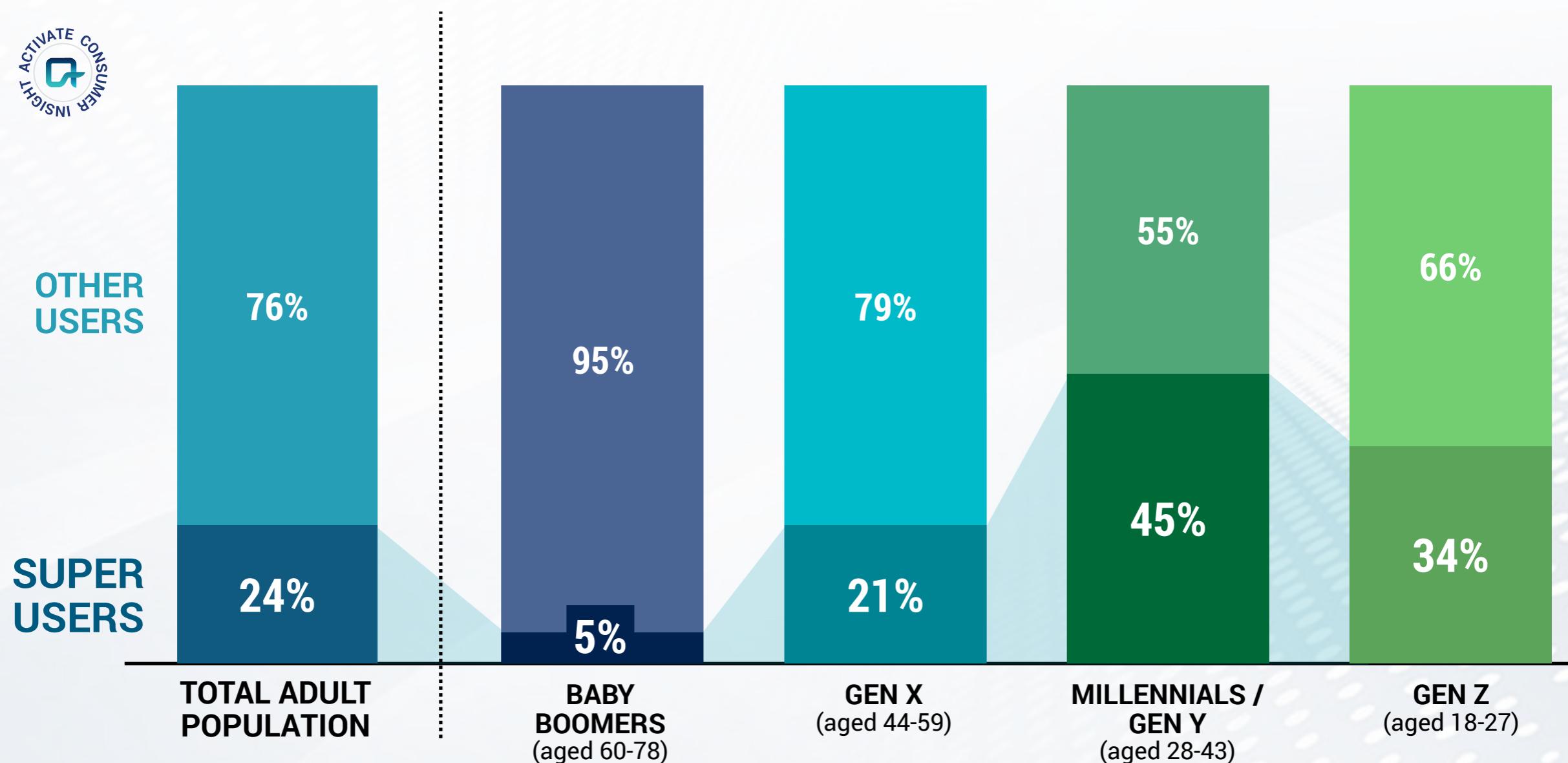


CONSUMER SENTIMENTS ABOUT DIGITAL IDENTITY, U.S., 2024, % ADULTS AGED 18+



Super Users span all age cohorts

SUPER USERS BY GENERATION, U.S., 2024, % ADULTS AGED 18+ / % ADULTS AGED 18+ BY GENERATION



ACTIVATE 2025 DATA PARTNERS

The Nielsen logo consists of a blue circle containing three white arrows pointing to the right.The Luminate logo consists of a blue circle containing the word "Luminate" in white, sans-serif font.The tubular logo consists of a blue circle containing a white icon of a video camera and the word "tubular" in white, sans-serif font.



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ENABLEMENT



PRICING



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CREATION



PRIVATE EQUITY
SERVICES



PROJECT
MANAGEMENT

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Activate Technology & Media 
Outlook 2025

Thank you!

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