



# ACTIVATE CONSULTING TECHNOLOGY & MEDIA OUTLOOK 2025 CONSUMER TIME & ATTENTION

CREATED FOR ACTIVATE BY ASW



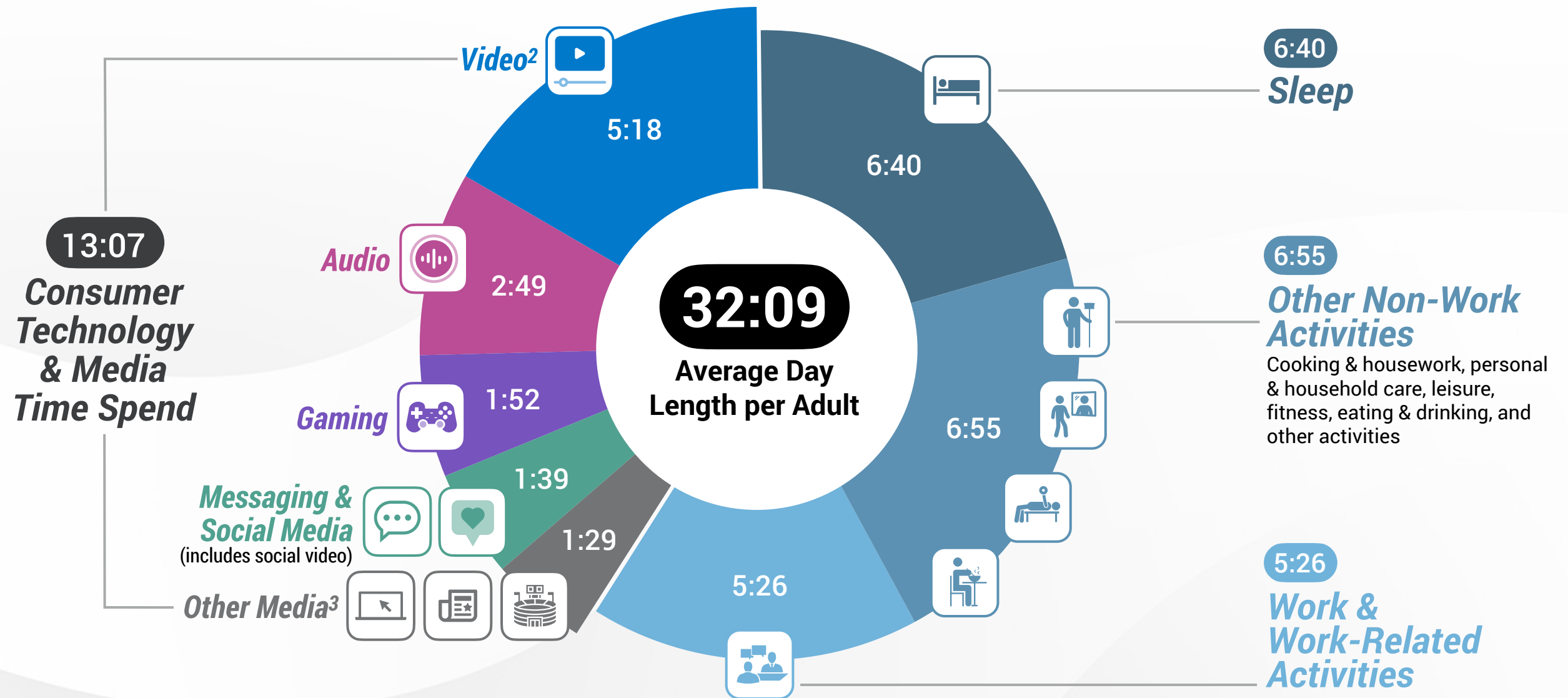
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# Activate's Attention Clock: Our analysis of consumer technology and media activity shows that multi-tasking leads to a 32-hour day for the average American, with over 13 hours spent using technology and media

 AVERAGE DAY BY ACTIVITY PER ADULT AGED 18+<sup>1</sup>, U.S., 2023, HOURS:MINUTES

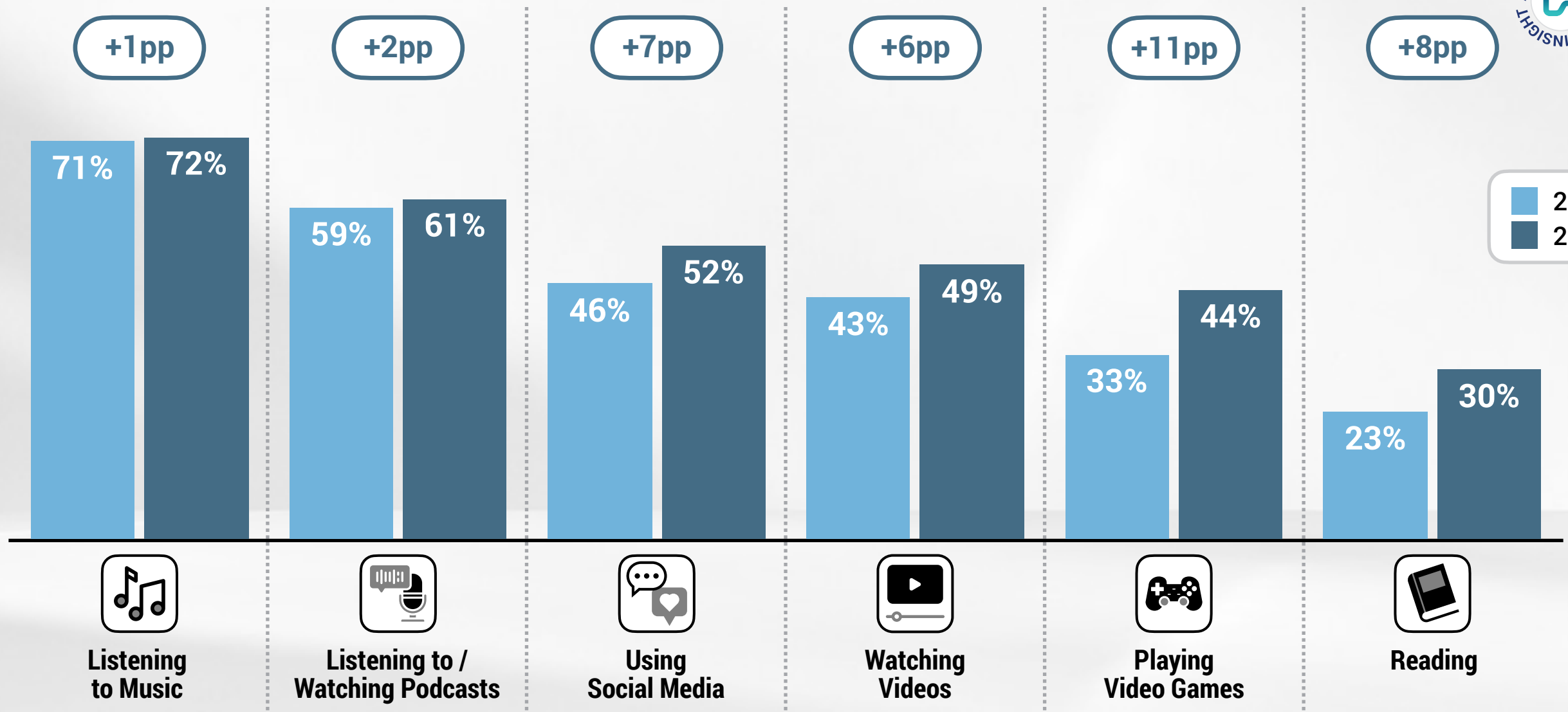


1. Behaviors averaged over seven days. Figures do not sum due to rounding. 2. "Video" includes YouTube. 3. "Other Media" includes media activities outside of the listed categories, such as browsing websites, reading, and attending live events. Sources: Activate analysis, Activate 2024 Consumer Technology & 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

# People are multi-tasking more than ever

MULTI-TASKING<sup>1</sup> BEHAVIOR BY ACTIVITY<sup>2</sup>, U.S., 2023 VS. 2024, % ADULTS AGED 18+ WHO ENGAGE IN EACH ACTIVITY

*Consumers who multi-task<sup>1</sup> all, almost all, or most of the time when...*



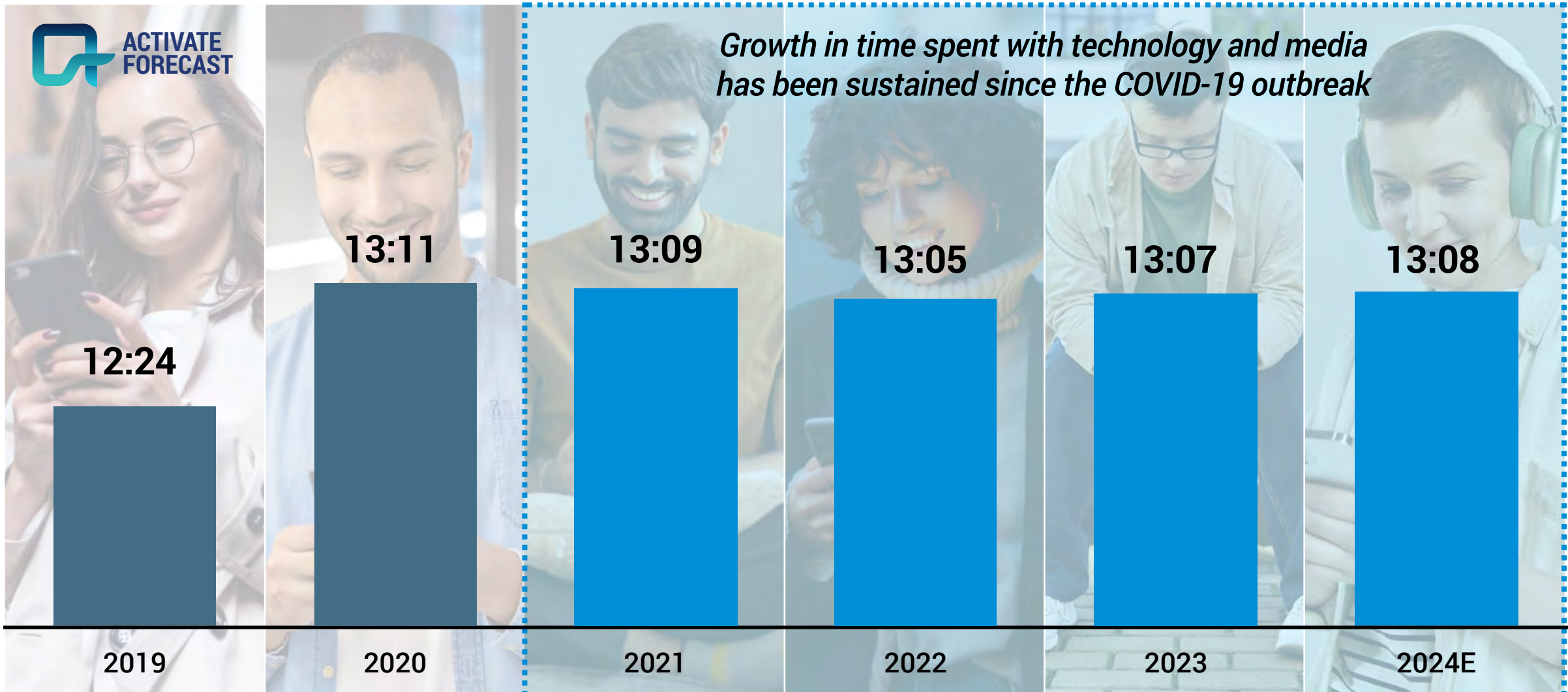
2023  
2024

1. "Multi-tasking" is defined as simultaneously doing another activity, such as working, cleaning, cooking, or exercising. 2. Figures do not sum due to rounding.  
Sources: Activate analysis, Activate 2023 Consumer Technology & Media Research Study (n = 4,023), Activate 2024 Consumer Technology & Media Research Study (n = 4,004)



# Multi-tasked time with technology and media jumped during COVID-19; this increase continues to be sustained four years later

AVERAGE DAILY TECHNOLOGY AND MEDIA ATTENTION PER ADULT AGED 18+<sup>1</sup>, U.S., 2019-2024E, HOURS:MINUTES



1. Behaviors averaged over seven days.

Sources: Activate analysis, Activate 2019 Consumer Technology & Media Research Study (n = 4,006), Activate 2020 Consumer Technology & Media Research Study (n = 4,003), Activate 2021 Consumer Technology & Media Research Study (n = 4,018), Activate 2021 Consumer Video Research Study (n = 2,014), Activate 2022 Consumer Technology & Media Research Study (n = 4,001), Activate 2023 Consumer Technology & Media Research Study (n = 4,023), 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

# By 2028, we forecast that people will spend an additional nine minutes each day with technology and media

AVERAGE DAILY TECHNOLOGY AND MEDIA ATTENTION PER ADULT AGED 18+<sup>1</sup>, U.S., 2024E VS. 2028E, HOURS:MINUTES



Other Media<sup>2</sup>



Messaging & Social Media  
(includes social video)



Gaming



Audio

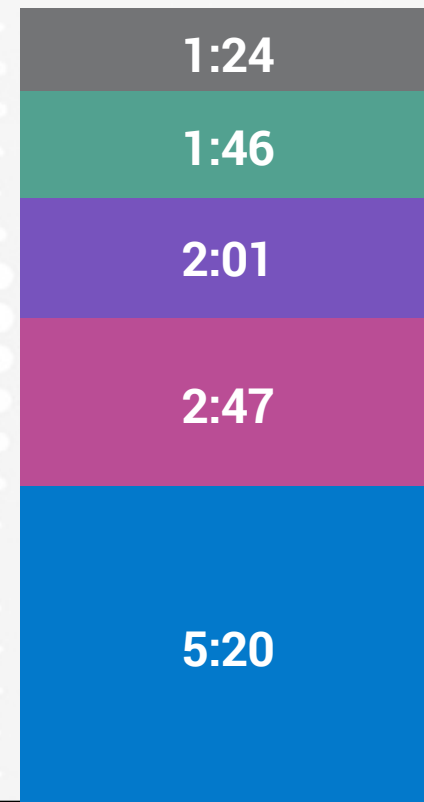
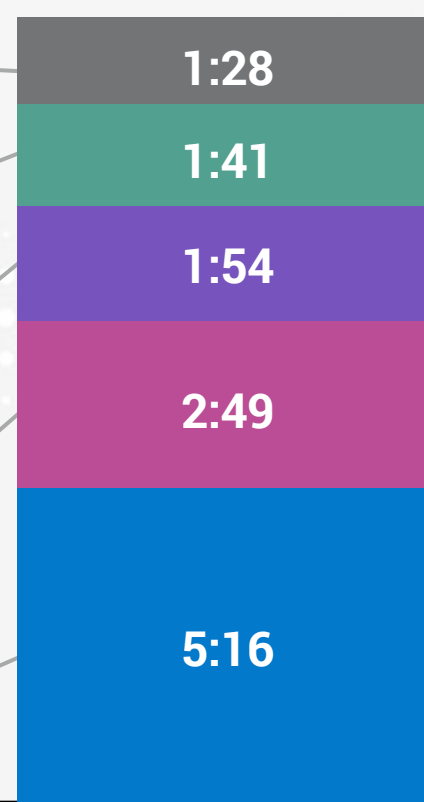


Video<sup>3</sup>

TOTAL TIME:

13:08

13:17



2024E-2028E  
CAGR:

0.3%

-1.1%

1.2%

1.4%

-0.4%

0.3%

2024E

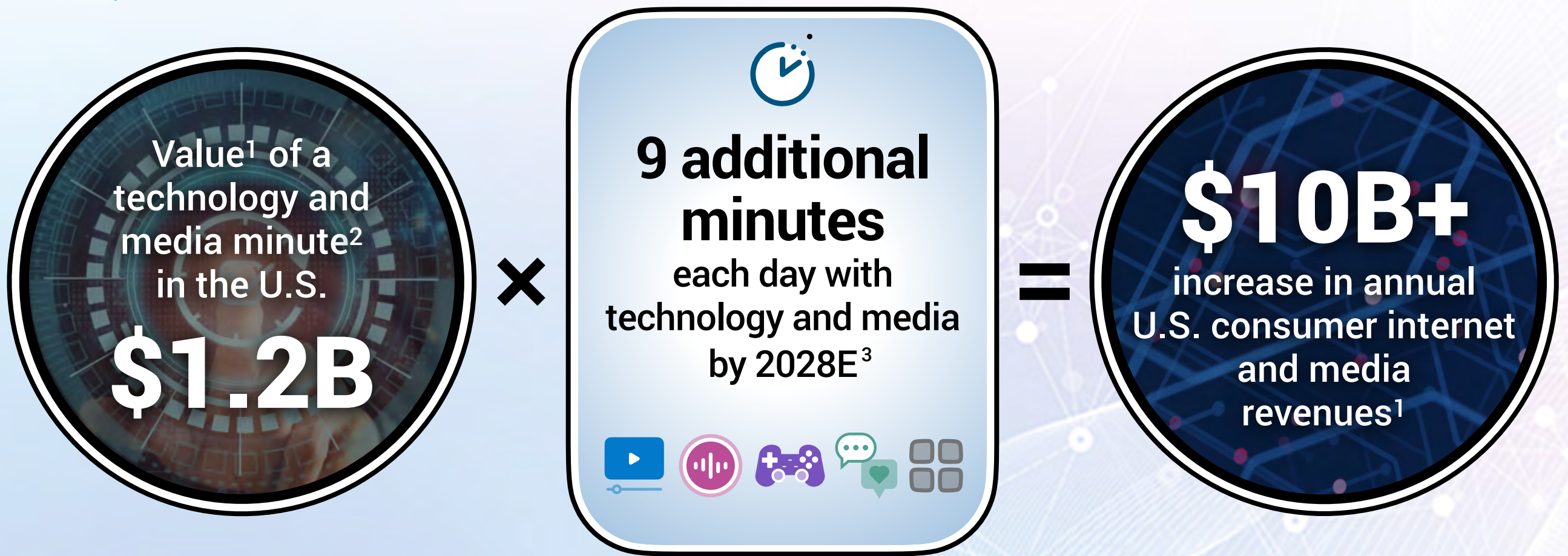
2028E

1. Behaviors averaged over seven days. Figures do not sum due to rounding. 2. "Other Media" includes media activities outside of the listed categories, such as browsing websites, reading, and attending live events. 3. "Video" includes YouTube.

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



# Those additional nine minutes will add over \$10B to the U.S. consumer technology and media industry



1. Includes revenues from radio subscription and licensing fees, recorded music, book publishing, magazine publishing, newspaper publishing, video games, filmed entertainment, TV subscription and licensing fees, internet access, digital advertising, and traditional advertising on these platforms. 2. Reflects the annual value of one minute of technology and media time each day for the average American in 2024E. Based on behaviors averaged over seven days. Includes video, audio, gaming, messaging & social media, and other media (e.g. browsing websites, reading, and attending live events). 3. Includes time spent with video, audio, gaming, messaging & social media, and other media (e.g. browsing websites, reading, and attending live events).

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

○ ACTIVATE 2025 DATA PARTNERS ○

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# Activate growth. Own the future.

**Technology. Internet. Media. Entertainment. eCommerce.** These are the industries we've shaped, but the future is where we live.

Activate Consulting helps technology and media companies drive revenue growth, identify new strategic opportunities, and position their businesses for the future.

As the leading management consulting firm for these industries, we know what success looks like because we've helped our clients achieve it in the key areas that will impact their top and bottom lines.

Together, we can help you grow faster than the market and smarter than the competition.

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Activate Technology & Media   
Outlook 2025

# Thank you!

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