



ACTIVATE CONSULTING TECHNOLOGY & MEDIA OUTLOOK 2025 SUPER USERS

CREATED FOR ACTIVATE BY ASW



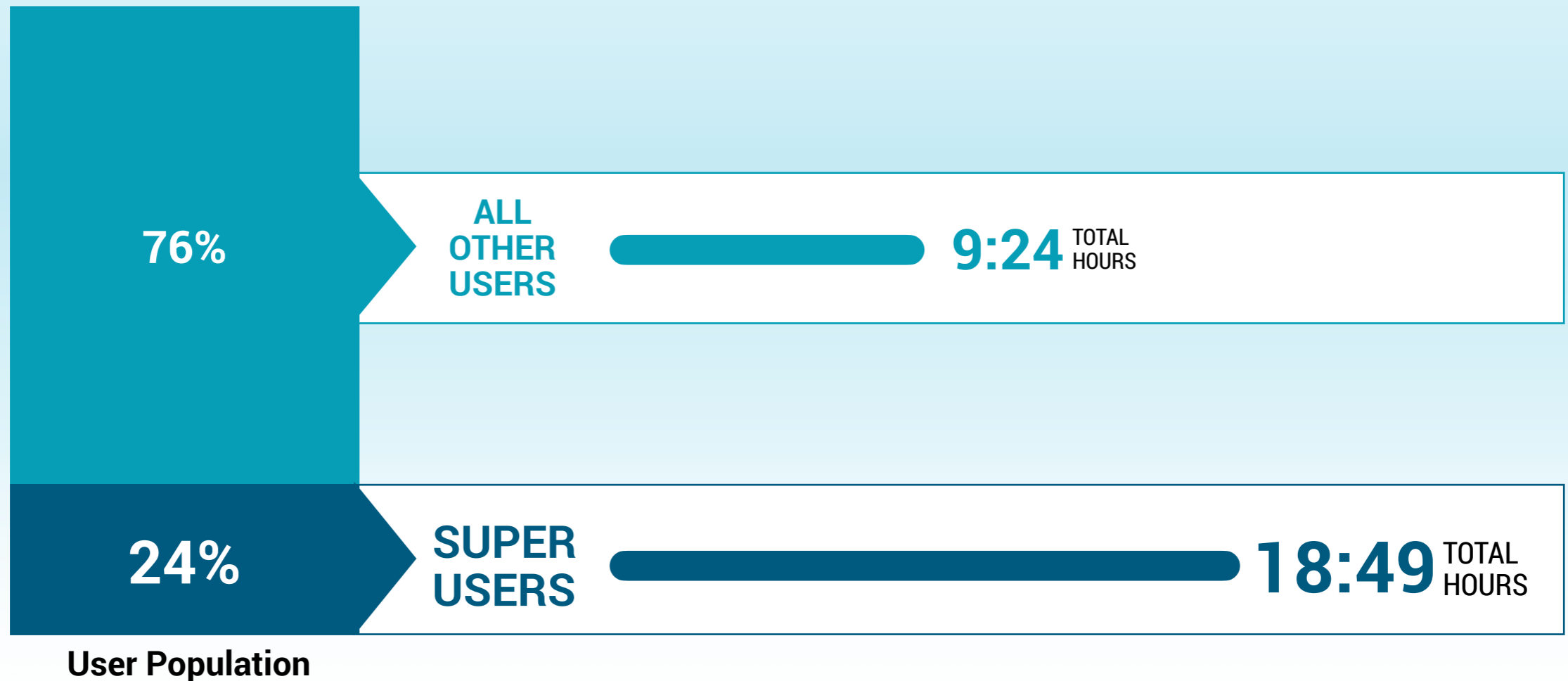
activate consulting

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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 spend 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

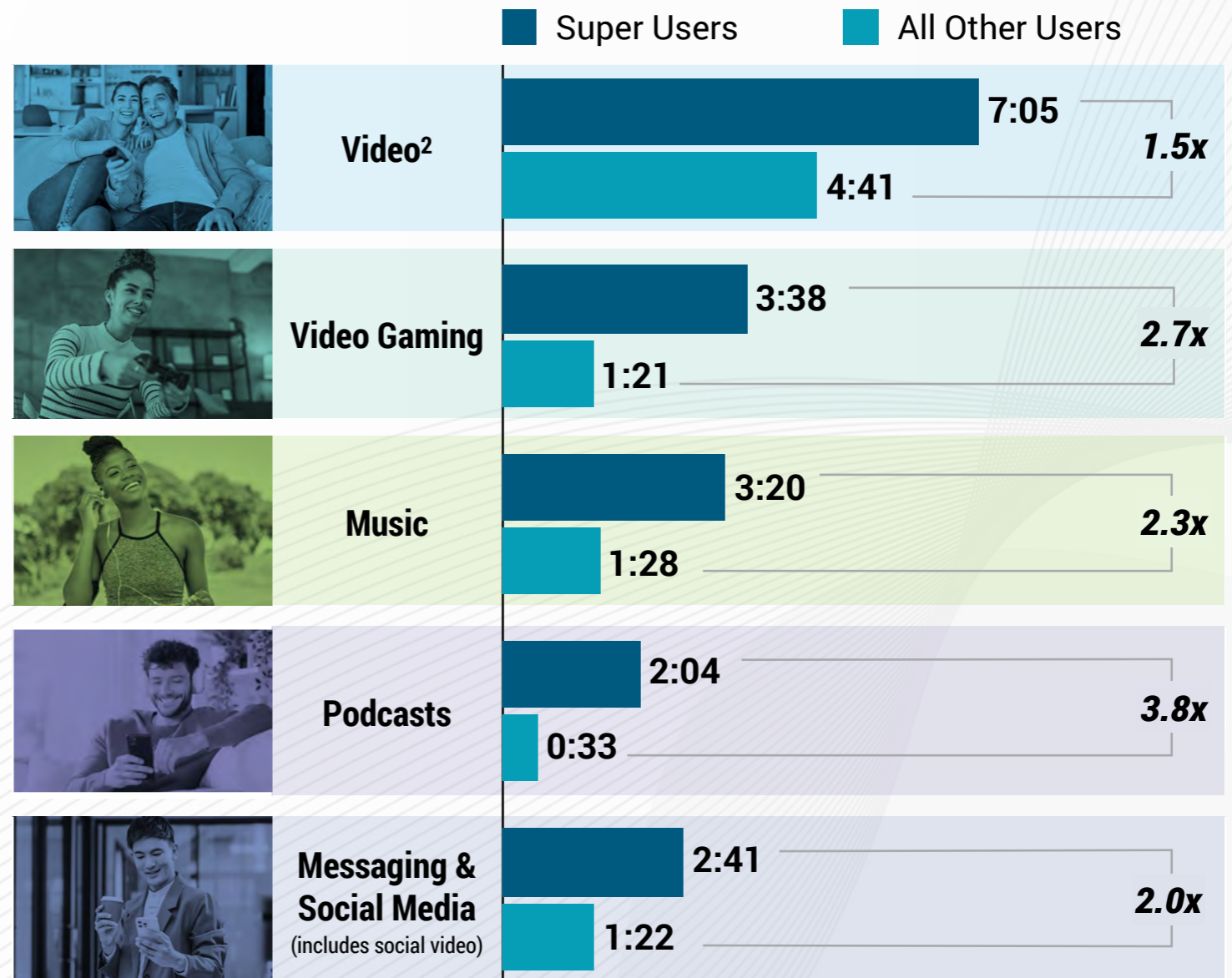
AVERAGE DAILY TIME SPEND PER USER BY TECHNOLOGY AND MEDIA TYPE, U.S., 2024E, HOURS:MINUTES

SUPER USERS

18:49
Total Hours¹

ALL OTHER USERS

9:24
Total Hours¹



1. Figures do not sum due to rounding. 2. "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

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

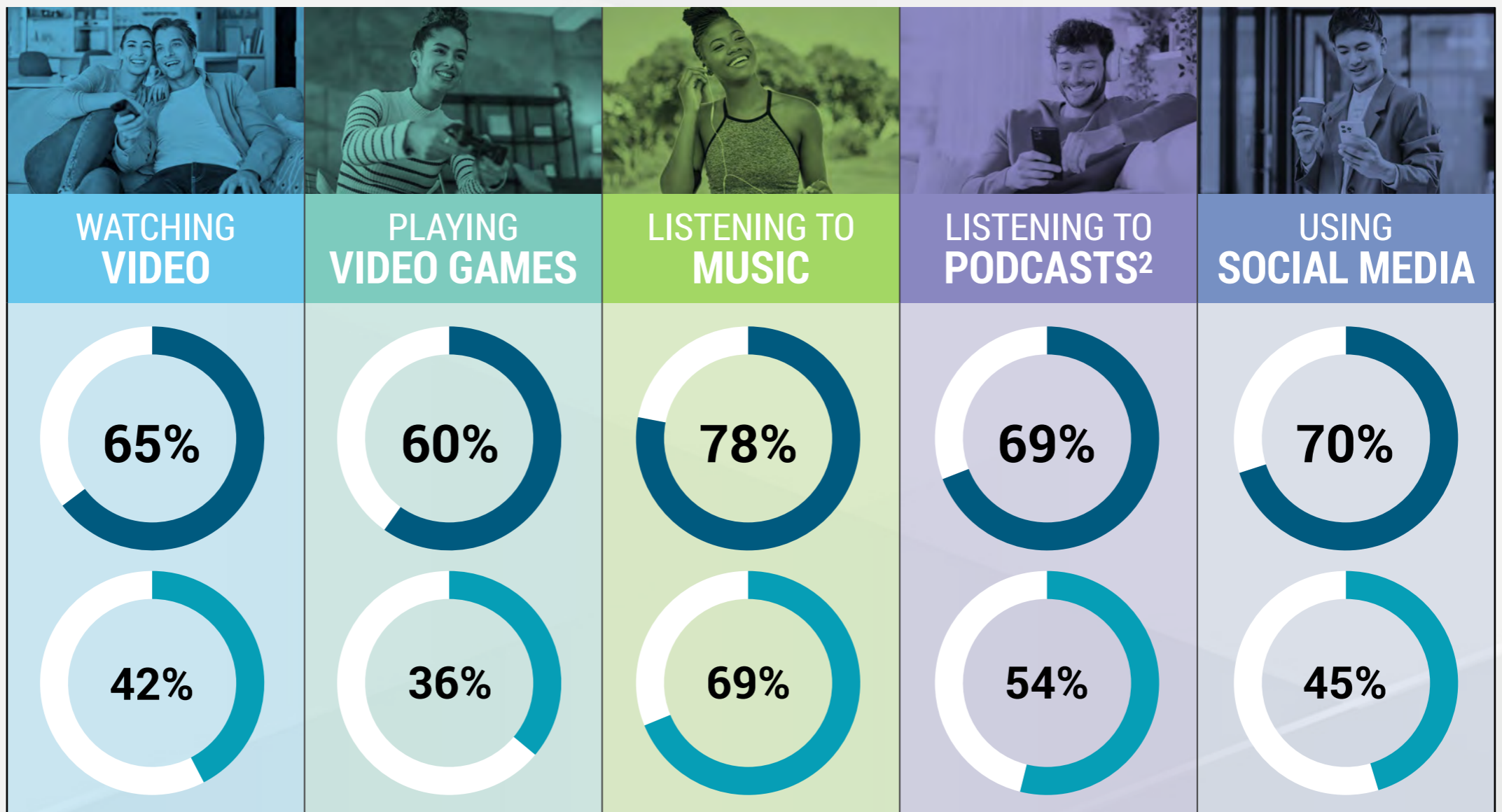
MULTI-TASKING¹ BEHAVIOR BY TECHNOLOGY AND MEDIA ACTIVITY, U.S., 2024, % ADULTS AGED 18+ WHO ENGAGE IN EACH ACTIVITY

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



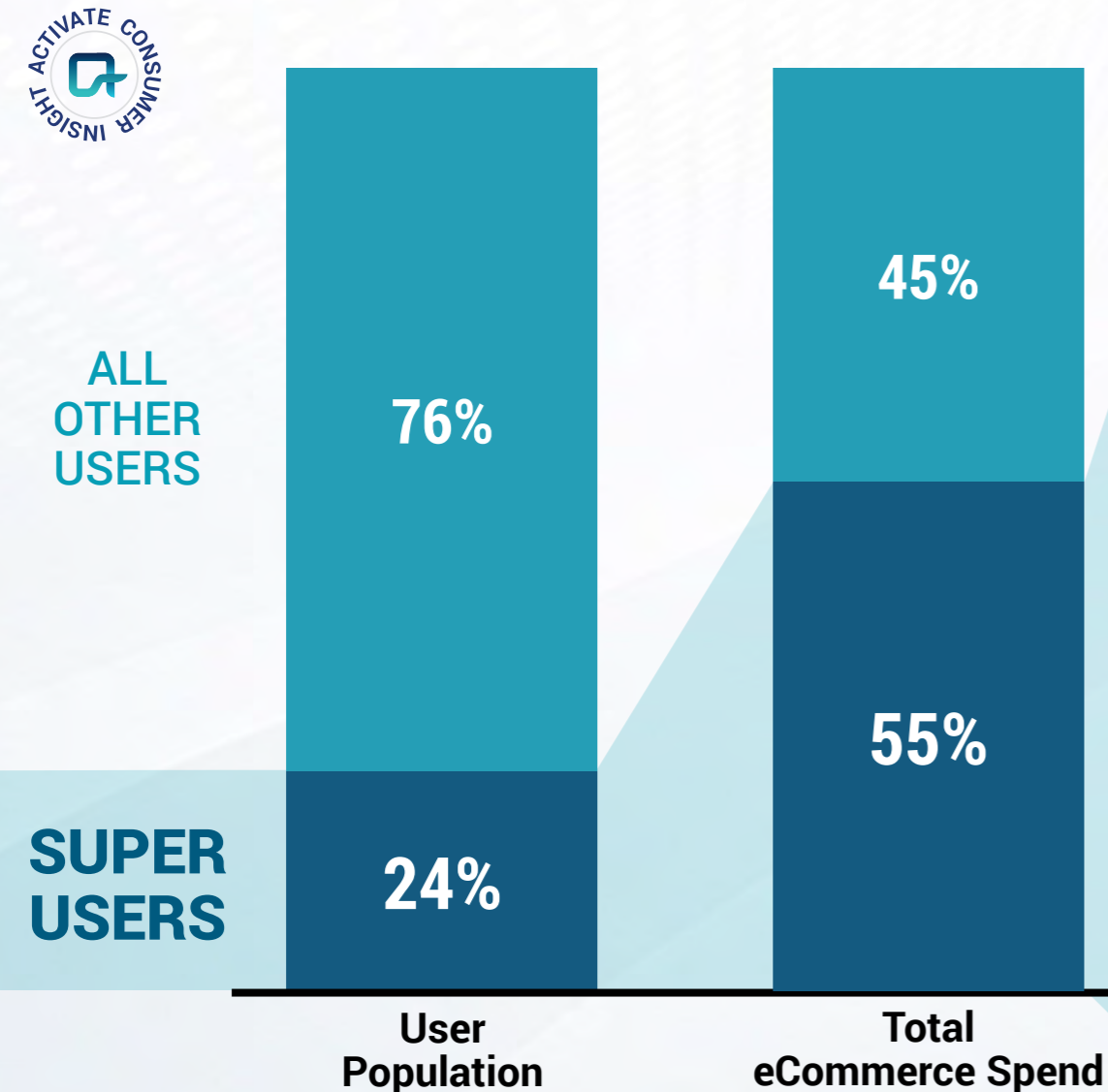
**SUPER
USERS**

**ALL
OTHER
USERS**



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



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



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)

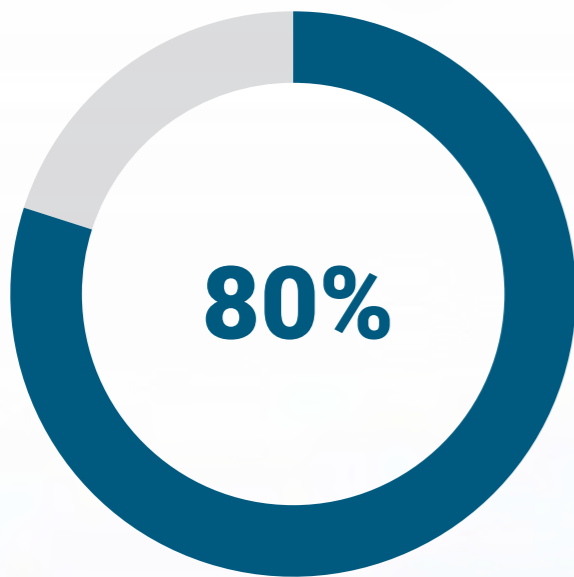
Super Users are significantly more likely to be early adopters of new technology/devices

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

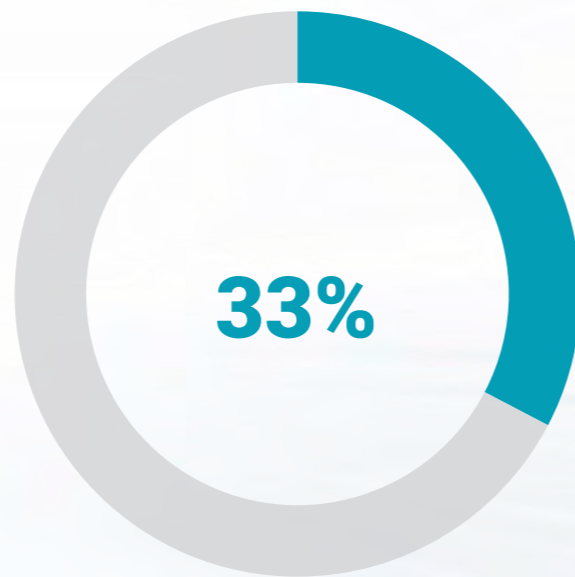
REASONS FOR EARLY ADOPTION OF TECHNOLOGY/DEVICES, U.S., 2024, % ADULTS AGED 18+ WHO ARE USUALLY AMONG THE FIRST FEW TO BUY/USE NEW TECHNOLOGY/DEVICES¹



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



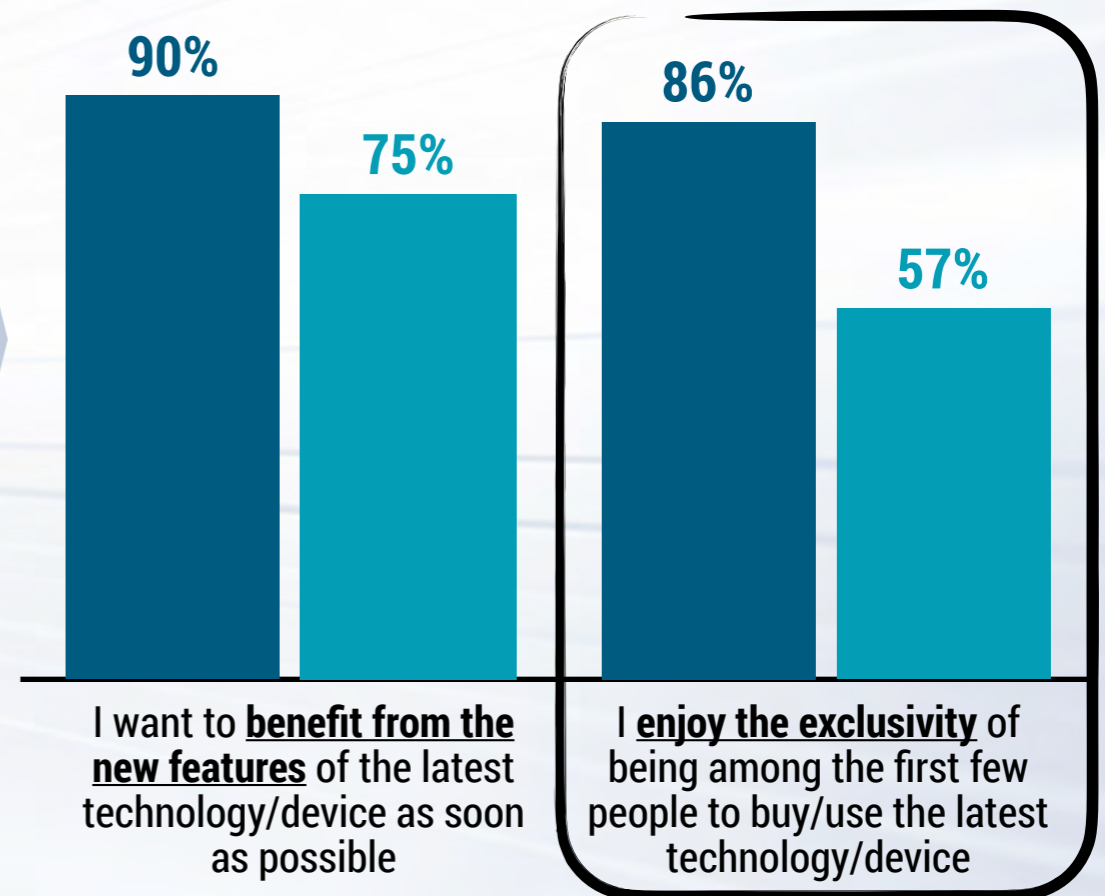
SUPER USERS



ALL OTHER USERS

■ % 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



1. Includes consumers who usually buy/use new technology/devices before anyone else they know and consumers who usually buy/use new technology/devices after a few people they know have done so (but before many people they know have done so).

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

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



Super Users are...

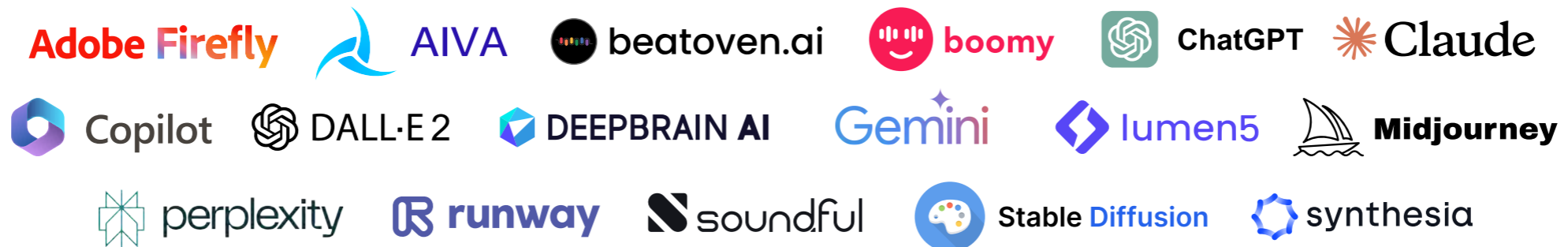
2.9x
AS LIKELY TO USE
A GENERATIVE AI PLATFORM
AT LEAST ONCE PER MONTH

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

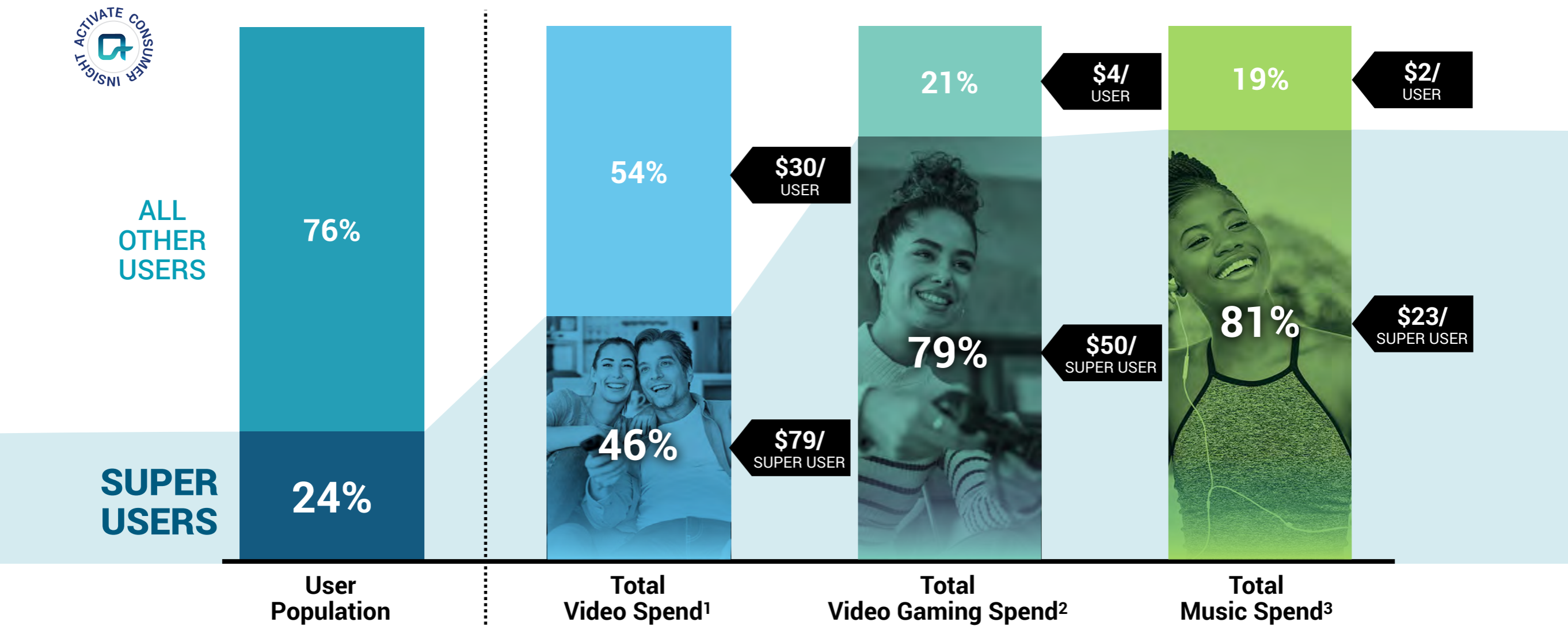
...as all other users

EXAMPLE GENERATIVE AI PLATFORMS TESTED IN OUR RESEARCH



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

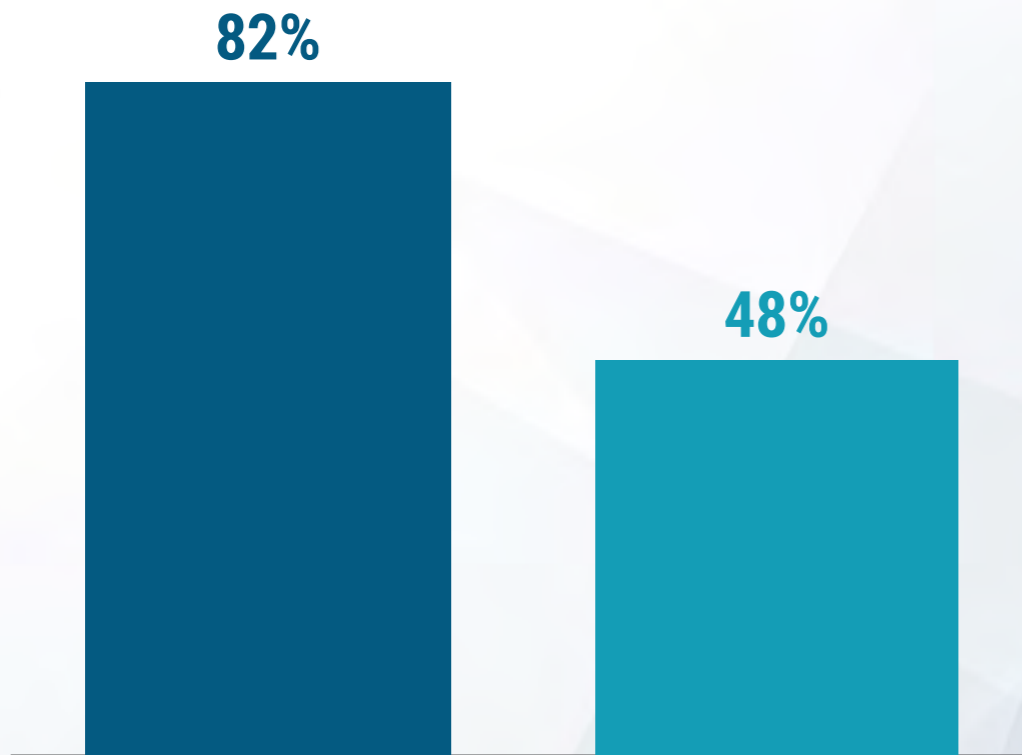
Super Users are more willing to share their data with technology and media companies in exchange for benefits

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



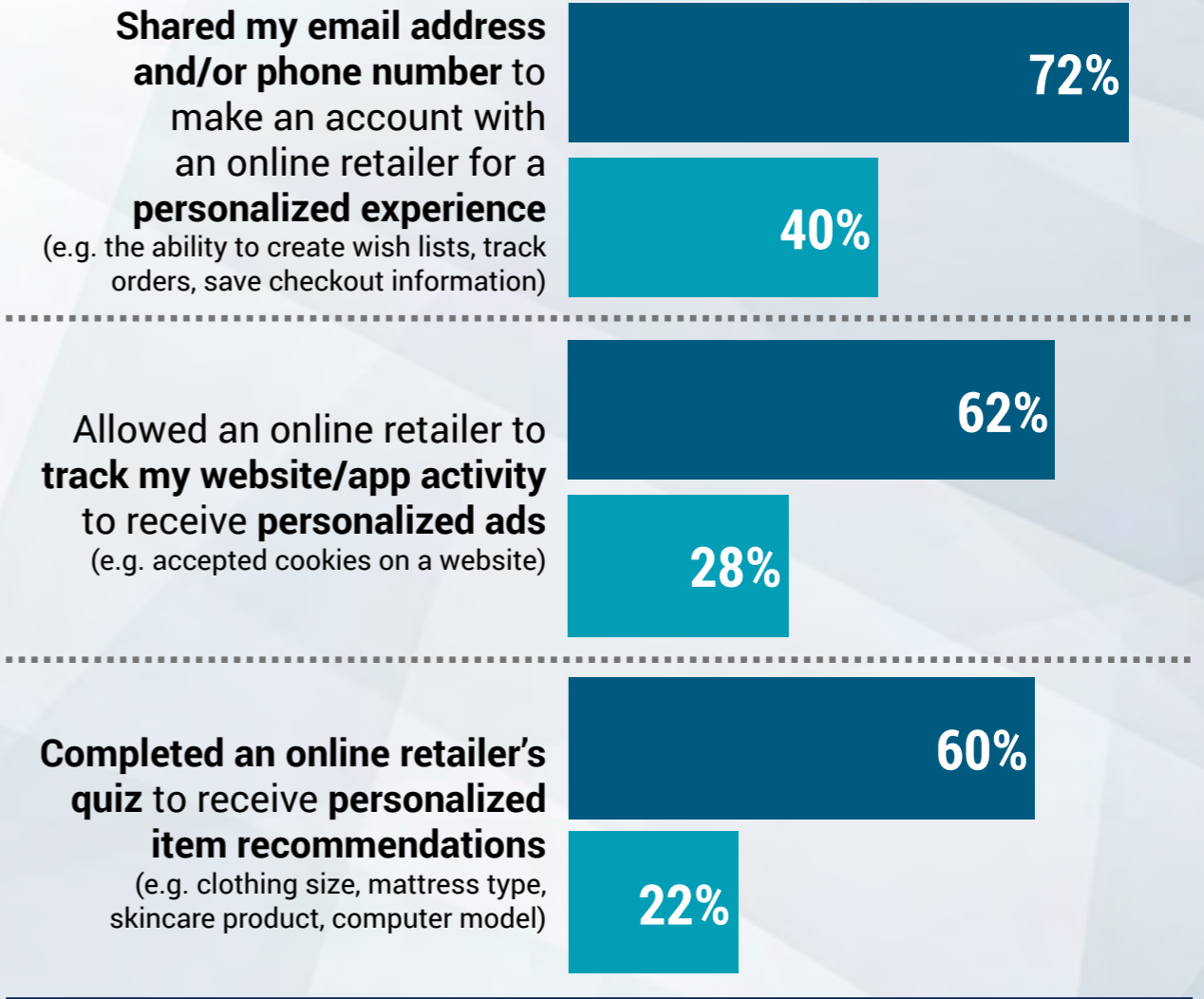
■ % Super Users ■ % All Other Users

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



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

OVER THE LAST 12 MONTHS, I...



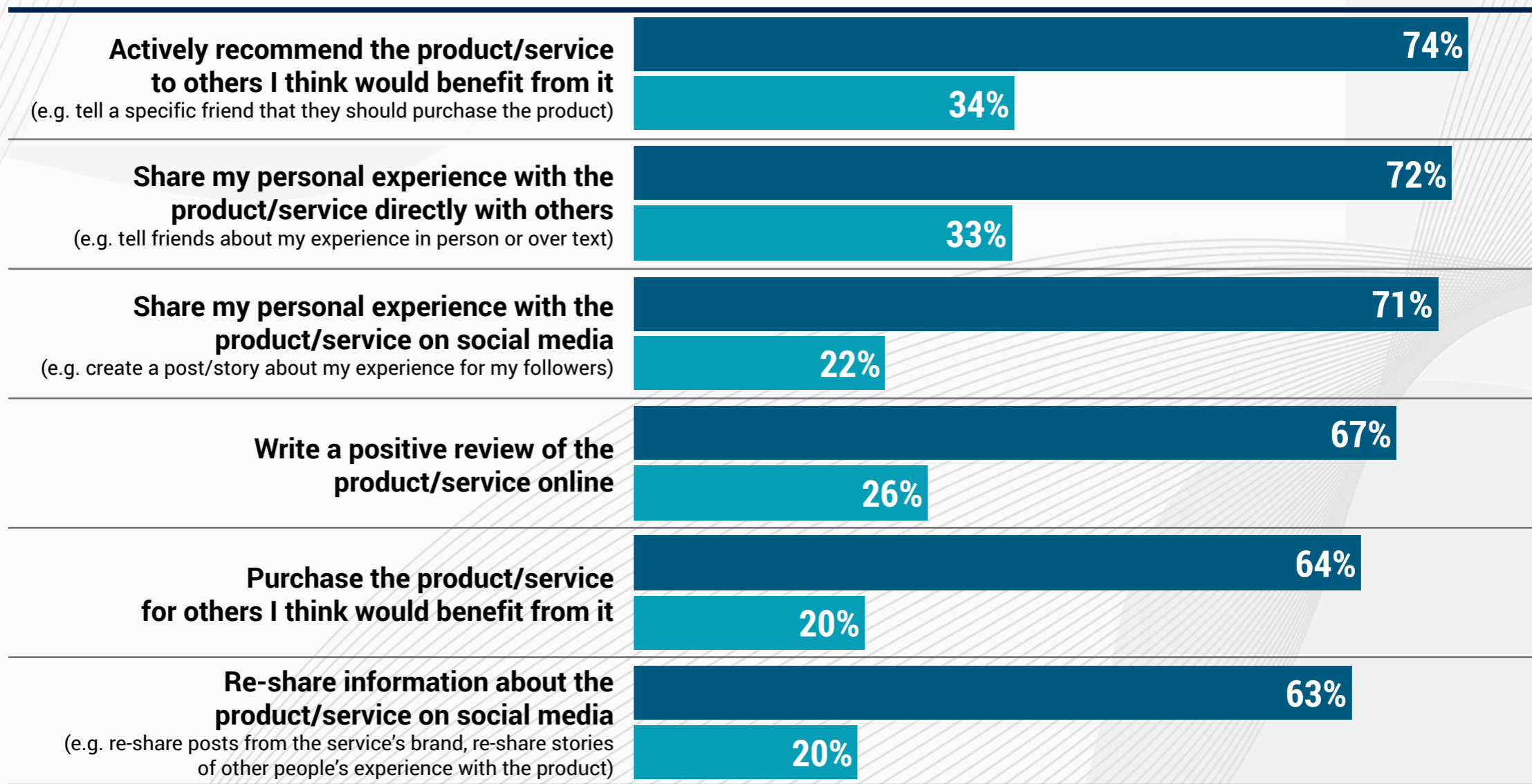
Super Users are significantly more likely to be brand amplifiers, sharing their experiences and recommending products/services

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



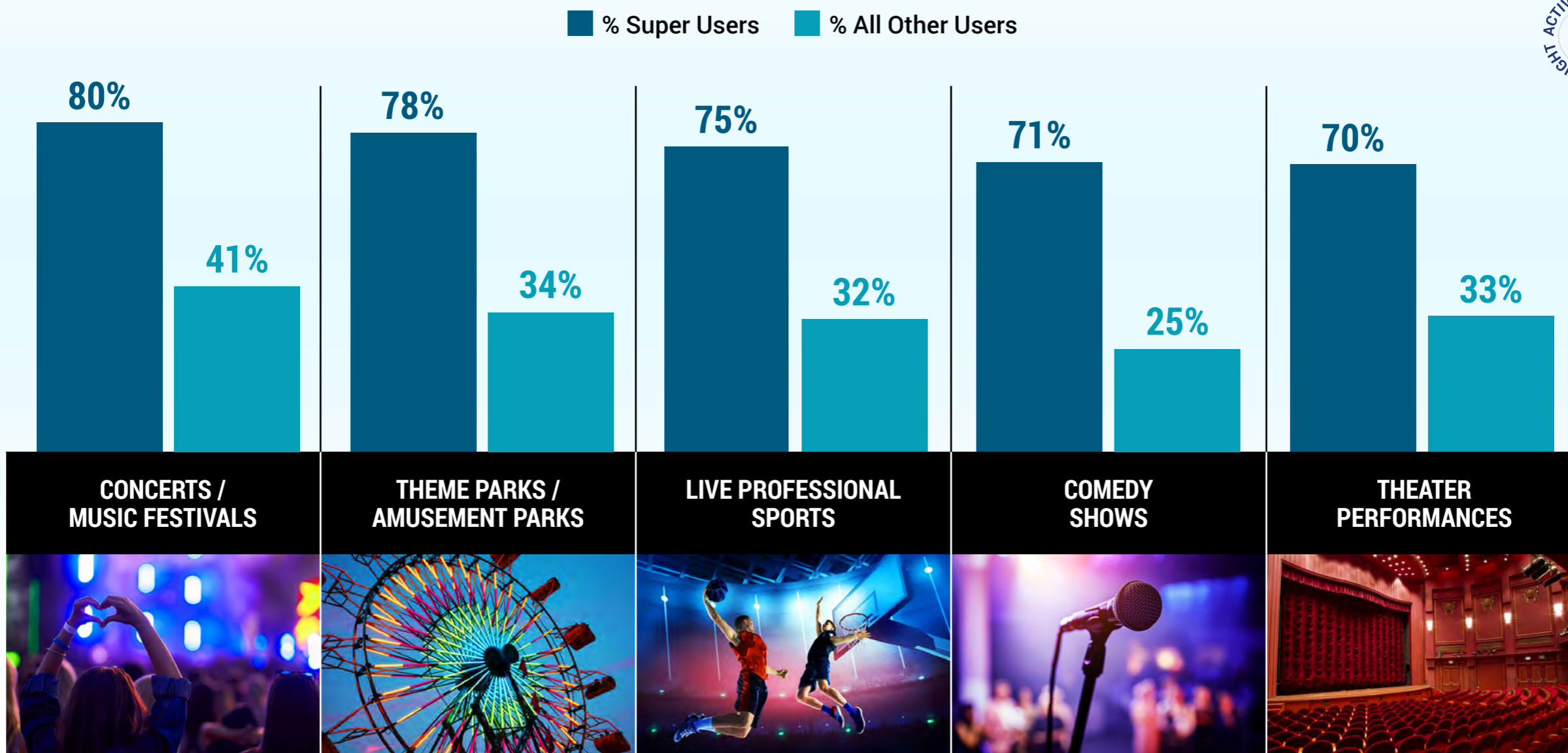
WHEN I ENJOY A PRODUCT/SERVICE, I ALWAYS OR OFTEN...

■ % Super Users ■ % All Other Users



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+



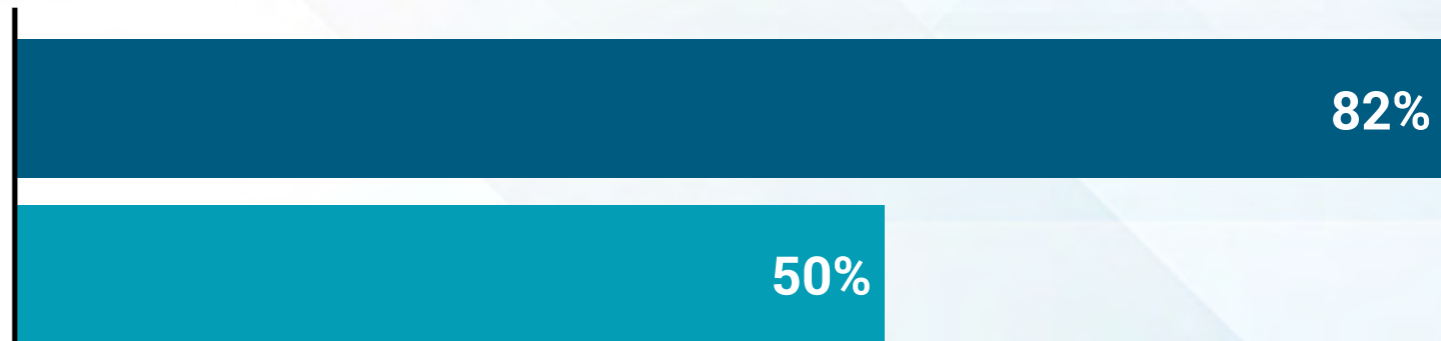
Super Users are more comfortable with their digital identities

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

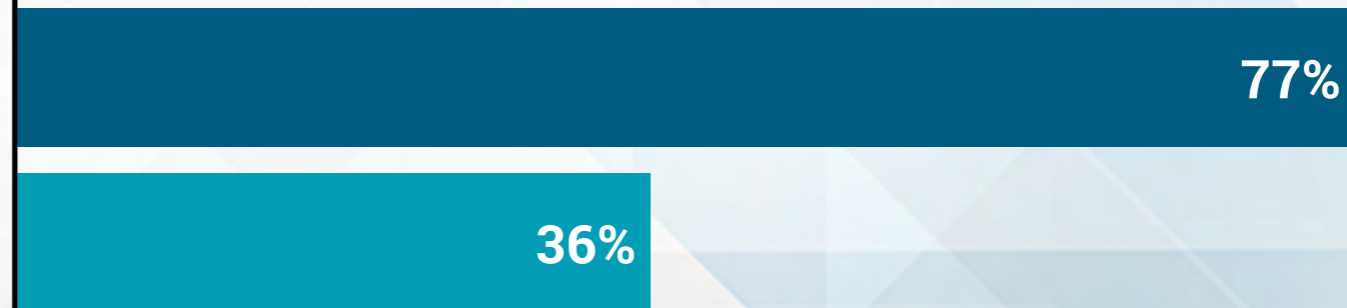


Enjoy **keeping informed on trends and news** about the latest technology and media products/services

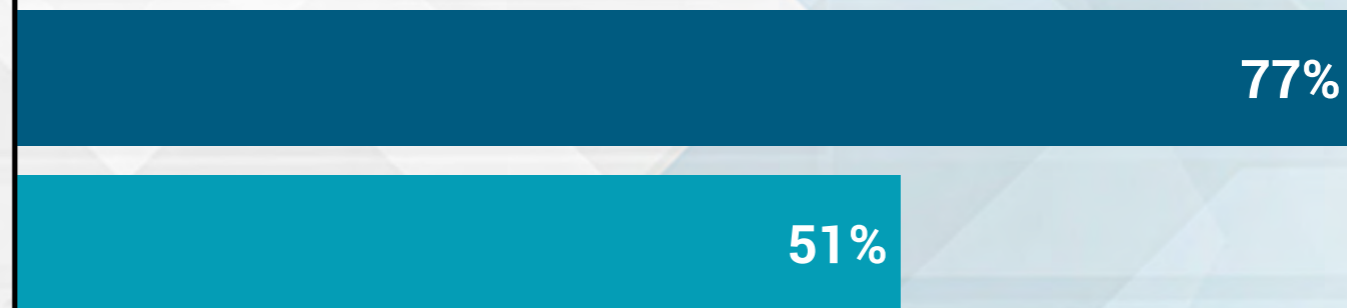
■ % Super Users ■ % All Other Users



Feel that they can **better express themselves when online**

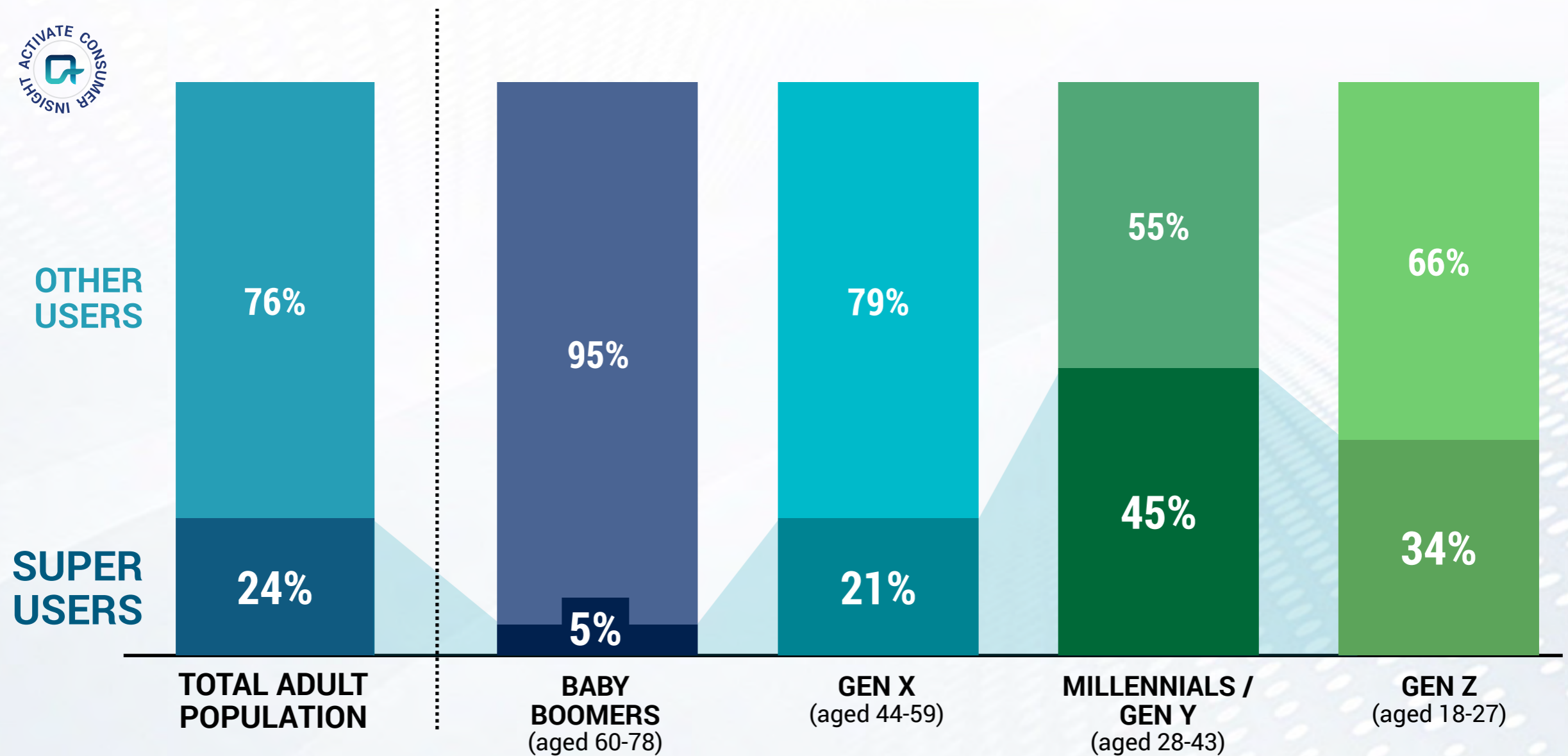


Feel that how they **present themselves online is equally or more important** compared to how they present themselves in person



Super Users span all age cohorts

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



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

○ ACTIVATE 2025 DATA PARTNERS ○

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Activate Technology & Media 
Outlook 2025

Thank you!

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