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IBM Institute for Business Value

Digital Consumer Survey 2011



Digital Consumer Survey 2011

Rampant consumer adoption of digital devices is making the world flatter, with key segments of mature and emerging markets already living in the “connected consumer era.”

From health to travel, to work and home, “connected living” impacts almost every aspect of daily life. In our fourth annual digital consumer survey, we questioned over 3,800 consumers in six countries – the United States, the United Kingdom, Germany, France, Japan, and China – to determine current and future digital content consumption behaviors. The results confirm that the connected consumer era has indeed arrived. Globally, consumers increasingly expect content on demand wherever they are – all the time. Furthermore, they want their content to provide experiences tailored to their context – both geographic and social – and their preferences – from types of food to favorite movies.

Our research confirms four global consumer digital behavioral trends:

- **“I’ll catch you later.”** – Digital viewing on demand is the new normal.
- **“Do you want that to go?”** – Due to mobile devices, it’s not only about time-shifting but place-shifting as well.
- **“How are YOU doin’?”** – It’s not just about connecting with content everywhere; it’s about connecting with people.
- **“East meets West”** – Connected Chinese consumers are leading the digital charge.

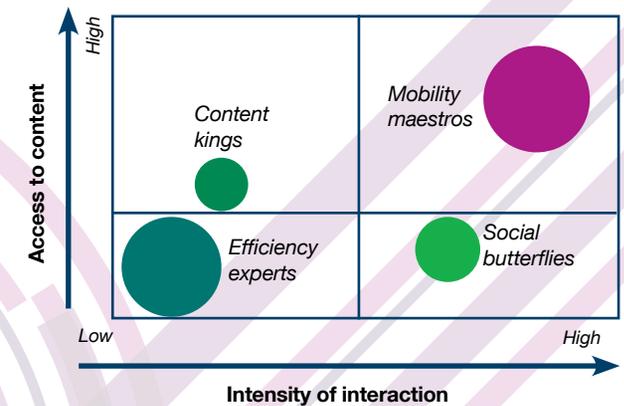
So, what does “connected living” mean for the consumption of traditional content? As our survey results illustrate, the impact is reverberating among consumers and content providers alike:

- **Viewing goes nonlinear:** Global consumers no longer give TV their undivided attention.
- **Cannibalization is real:** Traditional media and devices are in decline, including newspapers, DVDs and portable game players, amid early evidence that consumers are practicing “cord shaving” and “cord cutting.”
- **Pricing is optional, but payment isn’t:** Digital adoption leaders endorse a variety of payment models, including indirect payer models like advertising, as well as direct models, such as subscription and pay-per-use.

In the connected consumer era, adoption distinctions between older and younger audiences have closed. Legacy, age-based segmentation schemes no longer suffice. Content providers must deliver tailored experiences that match their customers’ digital personalities. Our research found the following global digital behavioral profiles:

- **“Content kings”** are dedicated gamers, newshounds, movie buffs, music lovers and/or TV fans.
- **“Social butterflies”** can’t imagine being unable to instantly access their friends regardless of time or place.
- **“Mobility maestros”** combine the behaviors of content kings and social butterflies with more sophisticated behaviors, such as talking using voice IM – they provide a window into our future.
- **“Efficiency experts”** see the adoption of digital devices and content as a way to make their lives easier.

Global digital behavior profiles



Today’s digital consumers are flocking to captivating, relevant and interactive content experiences, available when and where they desire. Emerging digital behavioral profiles are dictating not only which content is considered compelling, but how it is being consumed as well.

Is your company prepared to delight your customers in the connected consumer era?