

A generational snapshot



GEN Z

AGE: 14-24

\$63

Their average monthly spend on entertainment subscriptions



TOP 3 DIGITAL ENTERTAINMENT ACTIVITIES

Listening to music

Browsing social media

Watching paid TV/movie services



Have at least one paid entertainment subscription



Are concerned about the costs of having multiple subscription services



Have at least one sports streaming service



Have more entertainment services now than a year ago



Check social media at least five times a day

2.72

Average number of paid services that TV/movie streamers have

7

Hours of free-to-air TV (actively and passively) they are watching each week

8.5

Hours of paid streaming video services they are watching each week

14

Hours of free streaming video services (such as YouTube, Tiktok, Facebook) they are watching each week

Spending most of their social media time on...



Get their news most frequently on...

Social media | Television | Online newspaper sites



MILLENNIALS

AGE: 25-38

\$58

Their average monthly spend on entertainment subscriptions

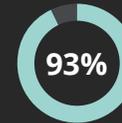


TOP 3 DIGITAL ENTERTAINMENT ACTIVITIES

Browsing social media

Listening to music

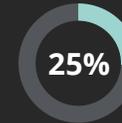
Watching paid TV/movie services



Have at least one paid entertainment subscription



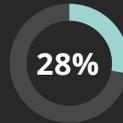
Are concerned about the costs of having multiple subscription services



Have at least one sports streaming service



Have more entertainment services now than a year ago



Check social media at least five times a day

2.6

Average number of paid services that TV/movie streamers have

9

Hours of free-to-air TV (actively and passively) they are watching each week

9

Hours of paid streaming video services they are watching each week

9

Hours of free streaming video services (such as YouTube, Tiktok, Facebook) they are watching each week

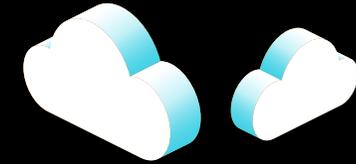
Spending most of their social media time on...



Get their news most frequently on...

Social media | Television | Online newspaper sites

A generational snapshot



GEN X

AGE: 39-55

\$53

Their average monthly spend on entertainment subscriptions

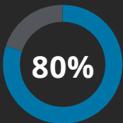


TOP 3 DIGITAL ENTERTAINMENT ACTIVITIES

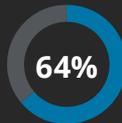
Watching live free-to-air TV

Listening to music and browsing social media (tie)

Watching paid TV/movie services



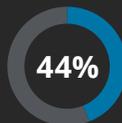
Have at least one paid entertainment subscription



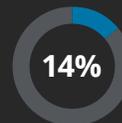
Are concerned about the costs of having multiple subscription services



Have at least one sports streaming service



Have more entertainment services now than a year ago



Check social media at least five times a day

2.26

Average number of paid services that TV/movie streamers have

13

Hours of free-to-air TV (actively and passively) they are watching each week

6.5

Hours of paid streaming video services they are watching each week

6

Hours of free streaming video services (such as YouTube, Tiktok, Facebook) they are watching each week

Spending most of their social media time on...



Get their news most frequently on...

Television | Social media | Radio



BOOMERS

AGE: 56-74

\$56

Their average monthly spend on entertainment subscriptions



TOP 3 DIGITAL ENTERTAINMENT ACTIVITIES

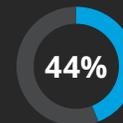
Watching live free-to-air TV

Listening to the radio

Watching paid streaming TV/movie services and Listening to music (tie)



Have at least one paid entertainment subscription



Are concerned about the costs of having multiple subscription services



Have at least one sports streaming service



Have more entertainment services now than a year ago



Check social media at least five times a day

1.86

Average number of paid services that TV/movie streamers have

18

Hours of free-to-air TV (actively and passively) they are watching each week

5

Hours of paid streaming video services they are watching each week

4

Hours of free streaming video services (such as YouTube, Tiktok, Facebook) they are watching each week

Spending most of their social media time on...



Get their news most frequently on...

Television | Radio | Printed newspapers

A generational snapshot



MATURES

AGE: 75+

\$49

Their average monthly spend on entertainment subscriptions

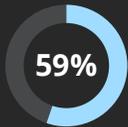


TOP 3 DIGITAL ENTERTAINMENT ACTIVITIES

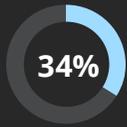
Watching live free-to-air TV

Listening to the radio

Listening to music



Have at least one paid entertainment subscription



Are concerned about the costs of having multiple subscription services



Have at least one sports streaming service



Have more entertainment services now than a year ago



Check social media at least five times a day

1.69

Average number of paid services that TV/movie streamers have

17.5

Hours of free-to-air TV (actively and passively) they are watching each week

3.5

Hours of paid streaming video services they are watching each week

2

Hours of free streaming video services (such as YouTube, Tiktok, Facebook) they are watching each week

Spending most of their social media time on...



Get their news most frequently on...

Television | Radio | Printed newspapers

Managing and consuming multiple services is becoming complex and the race is on to solve audience experience



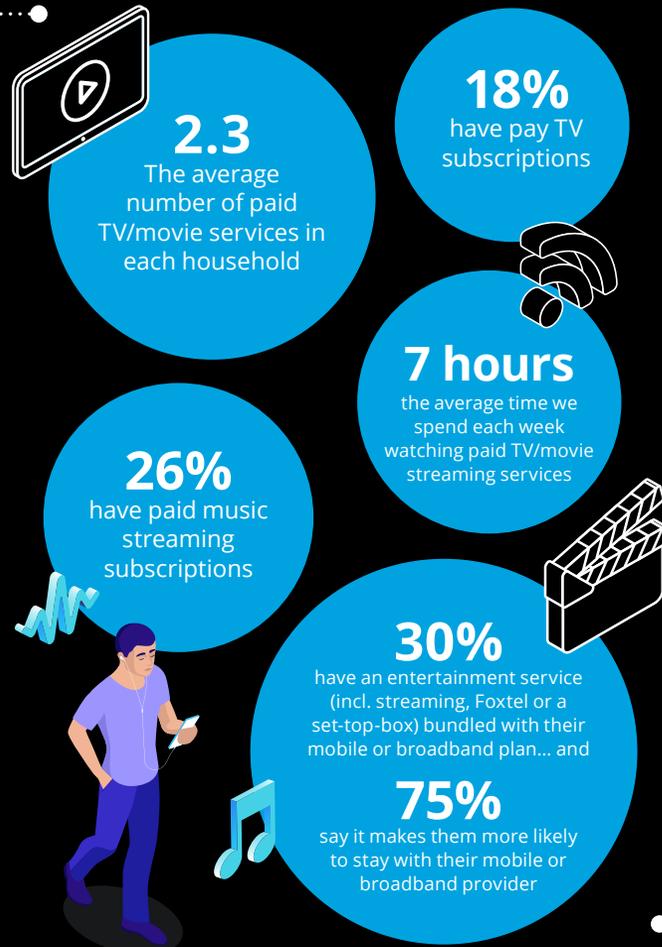
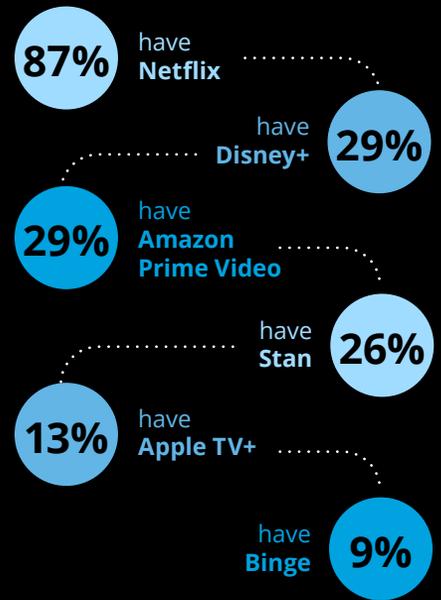
Subscription fatigue? Not yet.



TV and movie services a must-have

70%

have a TV/movie streaming subscription, and of those that do,



But the costs are rising

\$50
the average **target** entertainment subscriptions monthly spend

\$55
the average **actual** entertainment subscriptions monthly spend

60%
treat all subscriptions as part of one total household budget

58%
are concerned about the costs of multiple services

Turn it on and turn it off...

27%
of people have 're-churned' i.e. cancelled a subscription service and then rejoined

52%
would like to be able to subscribe to bundles of services from one account

42%
have more subscription services now than a year ago

Sport is the top reason pay TV subscribers keep their service ... and subscribing to a TV/movie streaming service instead was the top reason for cancelling and intention to cancel

A large content library, exclusive content, and avoiding advertisements are the main drivers for TV/movie subscription take-up



Advertising



We're still ad-verse...

46%

are most willing to engage with ads on TV, way ahead of smartphones (20%)

46%

actively block apps and websites from tracking their data

80%

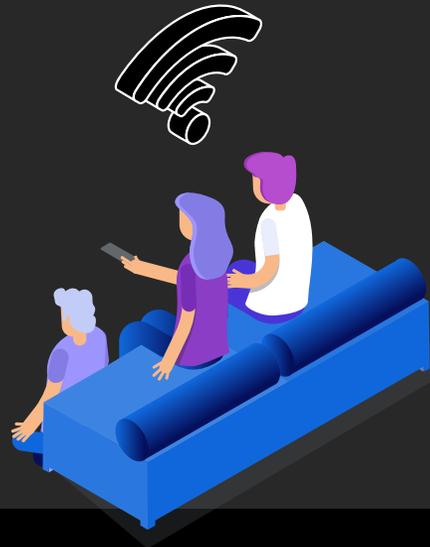
tend to skip online video ads if given the option to do so

49%

said that if they cannot skip a video ad, they will not wait to watch the content

28%

use ad blocking software



But there could be trade-offs

52%

willing to watch mobile ads to get free content

47%

would be willing to watch ads on a TV/movie streaming service if it reduced the subscription cost significantly

What types of content would you pay for in order to avoid ads?



51%

TV/movies
(40% in 2019)



43%

Music
(35% in 2019)



32%

News
(25% in 2019)



35%

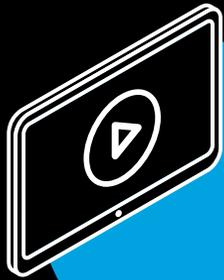
Sport
(35% in 2019)



31%

Games
(not asked in 2019)

News



Television news is the most frequently used news source, followed by radio and social media



49%

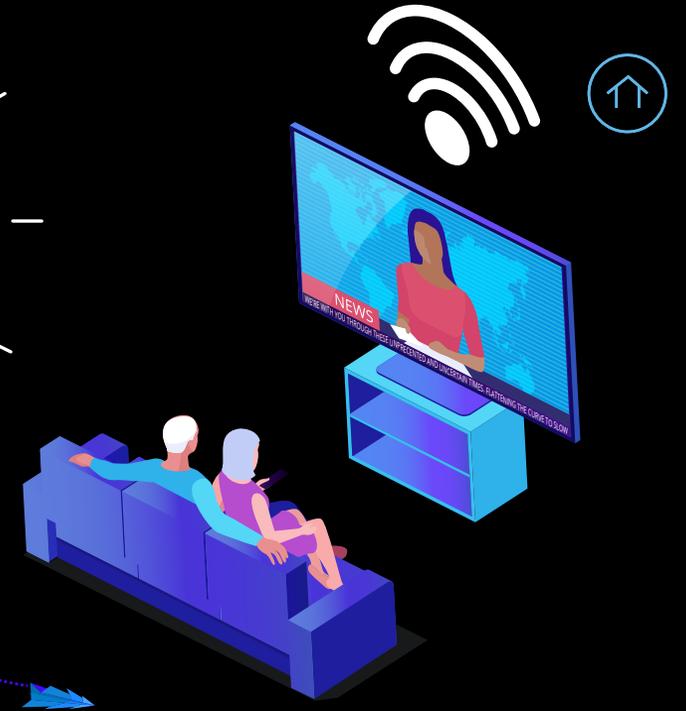
say that news is a major reason they check social media



64% are concerned about fake news in their feed

4% have newspaper/magazine subscriptions

'High quality content' and 'Trust in the news source' are the main drivers to pay for news



How much would you pay for news content?



19%
Up to \$10 per month

16%
\$11-\$30 per month

40%
would not pay at all

Sport

34%

watch more than four hours of sport each week

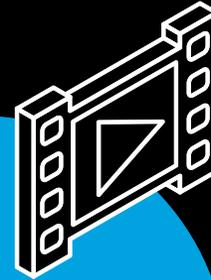


18%

have a digital sports subscription service

Free-to-air TV

is where we watch the most sport, followed by smartphones and laptops



The main drivers to subscribe to a paid service:

large range of content, no ads, exclusive sporting code



How much would you pay for sport content?



15%

Up to \$10 per month

23%

\$11-\$30 per month

56%

would not pay at all

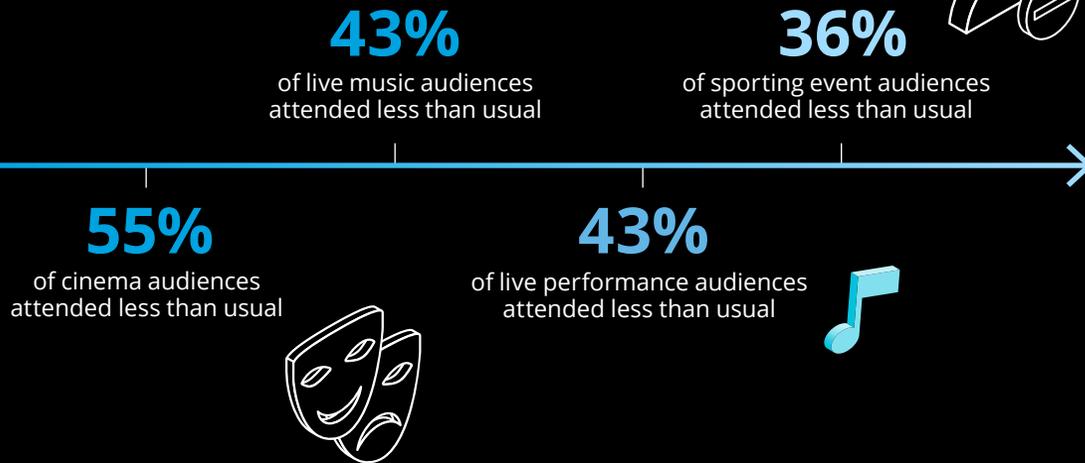
The long-tail of lockdown



The continued effect on live entertainment events (cinema, music, live performance, sport)



Audiences have attended less in the last year than they usually do



'Worry about COVID-19 safety'

was the main influence for all, followed by

'COVID-19 protocols making the experience less enjoyable'

