

SOCIAL MEDIA **KILLED** THE TV GUIDES

How do younger audiences
discover content?



ANNA-LEE BRIDGSTOCK

Director of Data & Intelligence
LADbible Group

WHY ARE WE FOCUSING ON GEN-Z?

(AND WHY DO WE HAVE AUTHORITY TO TALK ABOUT THEM?)

**YOUNG PEOPLE ARE THE MOST IMPORTANT
COHORT FOR FUTURE GROWTH.**

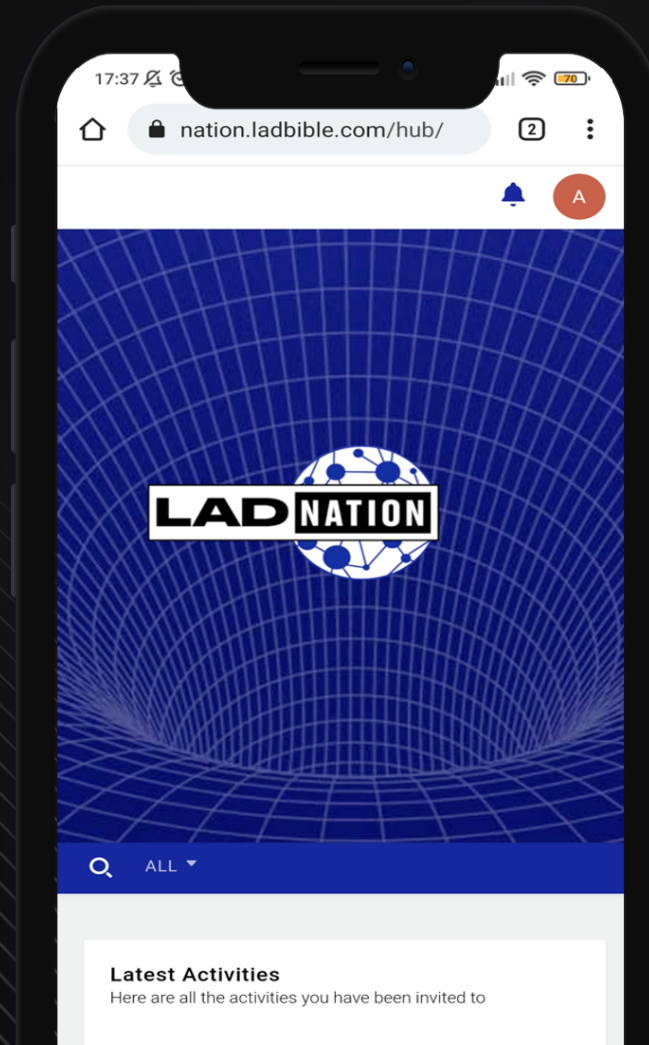
**GEN Z ESTIMATED NOW TO BE THE
LARGEST GENERATION COMPRISING
32% OF THE TOTAL GLOBAL POPULATION
(2.47 BILLION)**

**THEY'RE THE DRIVING FORCE BEHIND
THE CREATOR ECONOMY. A \$20BN
GLOBAL MARKET SET TO GROW TO
\$104BN IN 2022**

LADBIBLE REACHES THE **YOUTH GENERATION** AT SCALE.

AS A PUBLISHER WE:

- HAVE A MONTHLY GLOBAL AUDIENCE OF **1 BILLION PEOPLE**
- HAVE **4.5 BILLION VIEWS EVERY MONTH**
- REACH **HALF OF THE UK'S ADULT POPULATION** EACH MONTH
- REACH **2/3** OF ALL UK 18-34 YEAR OLDS
- HAVE A GENDER SPLIT OF **50 | 50**



AND WE HAVE CREATED A YOUTH RESEARCH PANEL TO UNLOCK INSIGHTS INTO THIS AUDIENCE:

**GROWING EVERY DAY.
CURRENTLY AT OVER
50,000 SIGN UPS.**

WE HAVE COMPLETED A RIGOUROUS STUDY ON STREAMING, TV AND CONTENT CURATION.

WE SPOKE TO OVER **4400** PEOPLE OVER 3 STUDIES...

3,186

of our research
community, LADNation.

Aged 18-34

1,272

People in an independent
streaming study

Aged 18-54

10

of our engaged audience
on LADnation in a 4 day
diary study

Aged 18-34

AND USED OUR OWN DATA...

LADbible Group
Youtube watch time data

January 2020 – August 2022

Crowdtangle –
LADbible Group

April 2022 – August 2022

THE **ROLE** OF TV CONTENT

HOW TV FITS INTO THE LIFESTYLES OF YOUNGER AUDIENCES

WATCHING TV CONTENT IS CONSIDERED ONE OF THE MOST ESSENTIAL ACTIVITIES IN THE LIVES OF YOUNG PEOPLE

WHAT DO THEY CONSIDER ESSENTIAL IN THEIR LIVES?

18 – 24

25 – 34

NO. 1

LISTEN TO MUSIC
75%

LISTEN TO MUSIC
66%

NO. 2

WATCH TV CONTENT
44%

WATCH TV CONTENT
53%

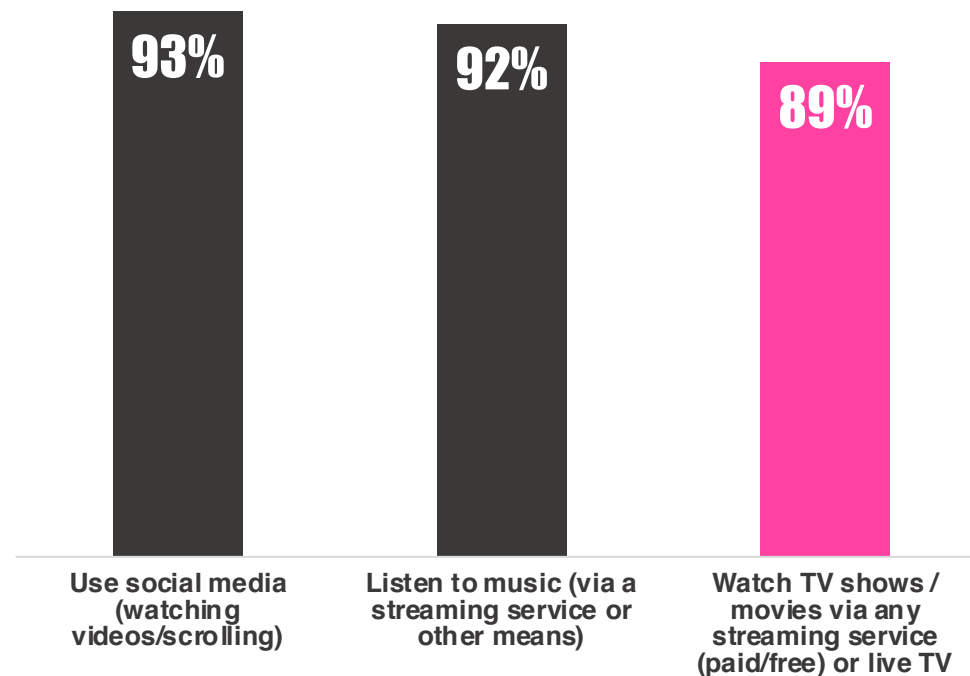
NO. 3

USE SOCIAL MEDIA
37%

USE SOCIAL MEDIA
31%

**NEARLY ALL OF 18-24S
WATCH TV CONTENT
EVERY WEEK**

% HAVE DONE IN THE LAST WEEK (TOP 3)



**WITH OVER 10% OF THEIR
DAY SPENT WATCHING
SOME FORM OF TV CONTENT
— NO. 2 BEHIND SOCIAL**

AVERAGE TIME SPENT PER DAY (HOURS)

18 – 24 YEAR OLDS

SOCIAL MEDIA	3.5 HOURS
TV (LIVE/STREAMING)	2.9 HOURS
MUSIC	2.7 HOURS
GAMING	1.3 HOURS
RADIO	1 HOURS
PODCASTS	0.5 HOURS
NEWSPAPER	0.2 HOURS
MAGAZINE	0.2 HOURS

ONE DRIVER OF THIS IS THE
PHRASE “**TV CONTENT**” IS
NOW **SYNONYMOUS** TO ANY
LONGER FORM CONTENT

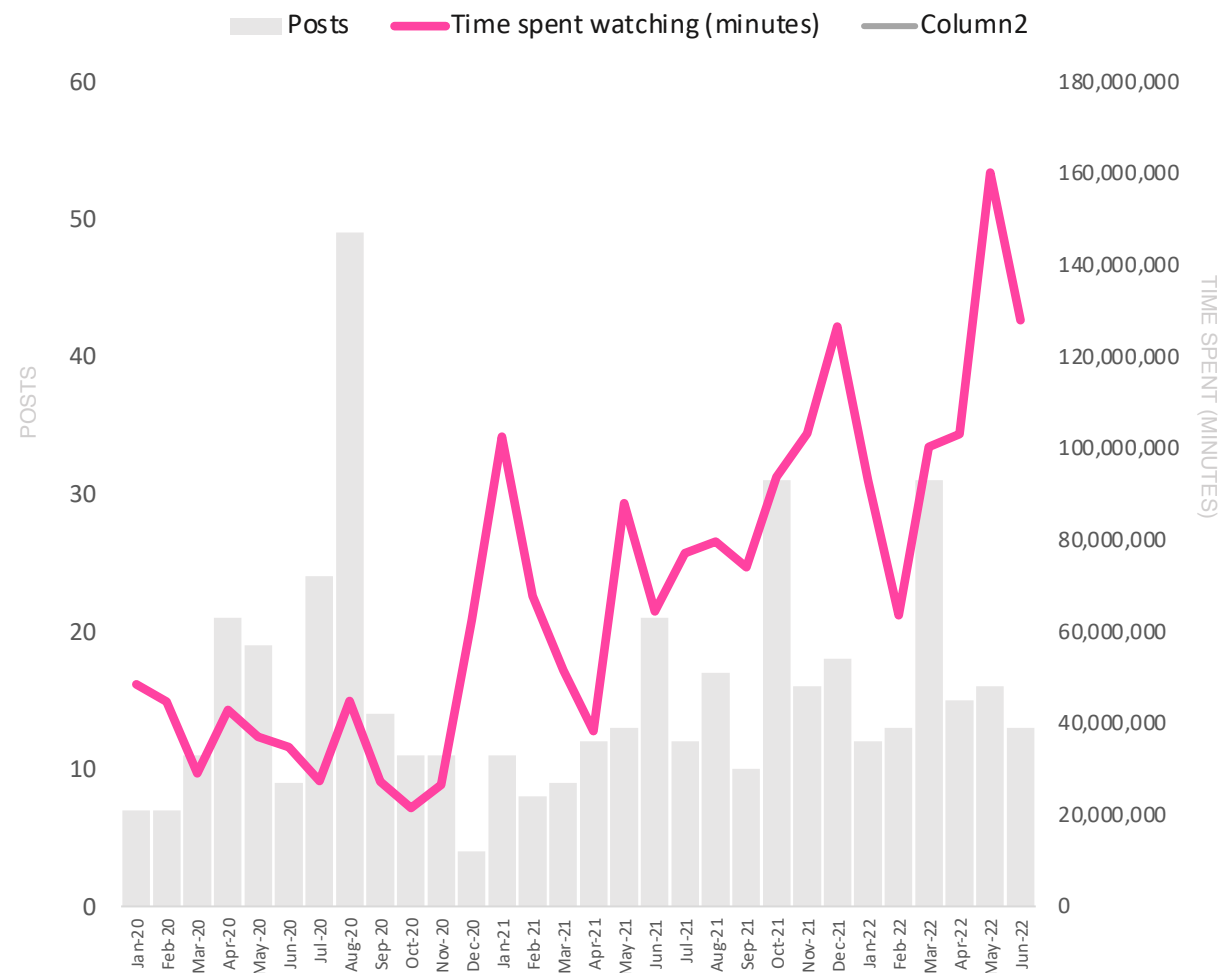
“WHEN I STREAM AN ONLINE SHOW / MOVIE
THROUGH MY TELEVISION SET, I CONSIDER
THIS TO BE ‘**WATCHING TV**’”

82%

Aged 18-34

INCREASES ARE DRIVEN BY
NEWER PLATFORMS, WHERE
LONGER FORM WATCH TIME
CONTINUES TO GROW








YouTube **LADBIBLE YOUTUBE WATCH TIME
NEARLY 3X HIGHER AT 160 MILLION
MINUTES MONTHLY**



Source: LADBible Group YouTube watch time data, Jan 2020 – July 2022

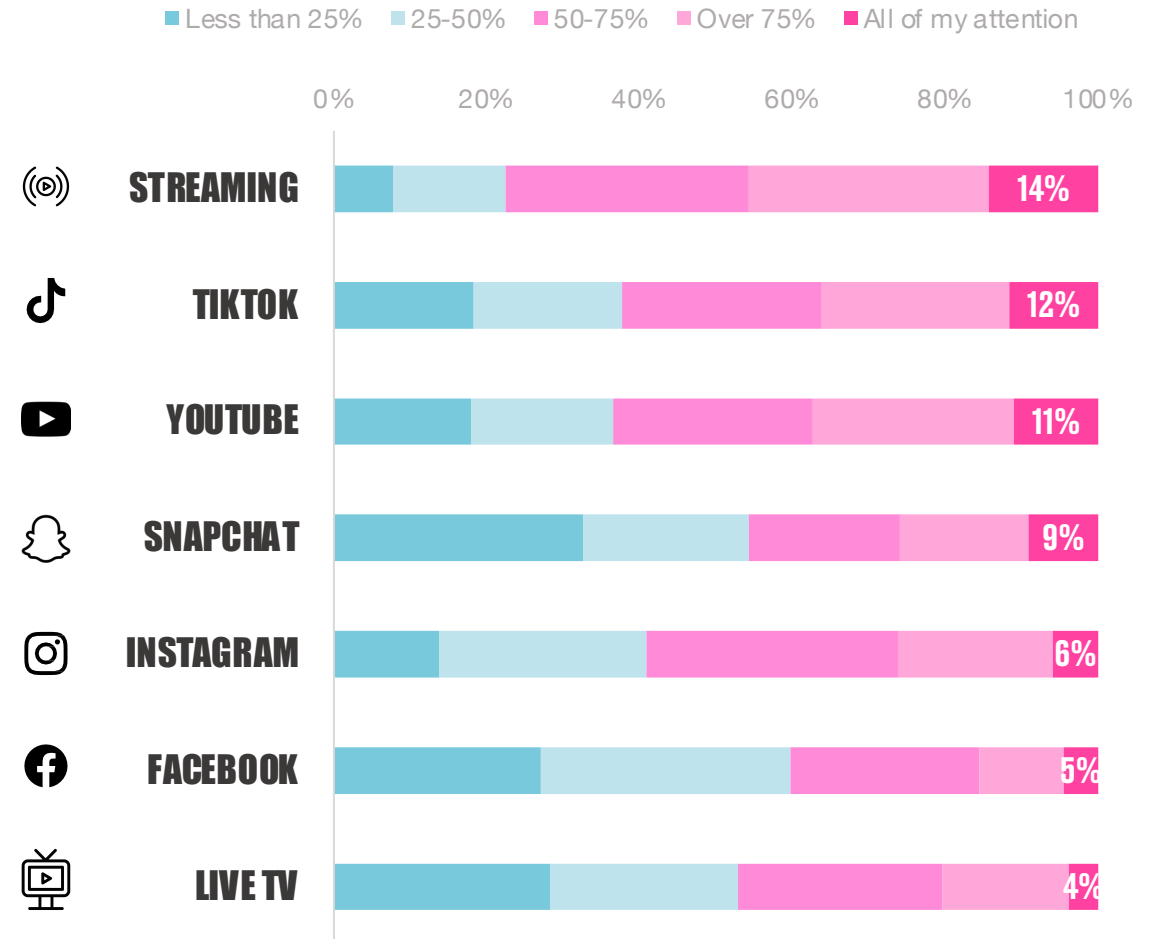
CREATE A NEW **ATTENTIVE MINDSET** FOR LONGER FORM VIEWING

WHERE WOULD YOU GO IN A SPARE HALF AN HOUR?

	TIK TOK	35%
	INSTAGRAM	23%
	YOUTUBE	15%
	SNAPCHAT	8%
	STREAMING	5%
	FACEBOOK	5%
	LIVE TV	2%

**PURPOSEFUL VIEWING
AND AN ATTENTIVE
MINDSET – EVEN IF
THIS IS PURPOSEFULLY
TO DISTRACT**

HOW MUCH **ATTENTION** IS GIVEN TO EACH PLATFORM? (%) AMONG USERS



Source: LADbible Group Streaming Study, August 2022

DISCOVERING TV CONTENT

HOW DO THEY FIND NEW SHOWS?

**SOCIAL MEDIA IS THE
NUMBER ONE WAY 18-24S
DISCOVER TV CONTENT**

HOW PEOPLE **DISCOVER CONTENT** (TOP 3)

18 – 24

NO. 01

ADVERTISING ON
SOCIAL MEDIA (37%)

NO. 02

SPEAKING WITH
FRIENDS & FAMILY (33%)

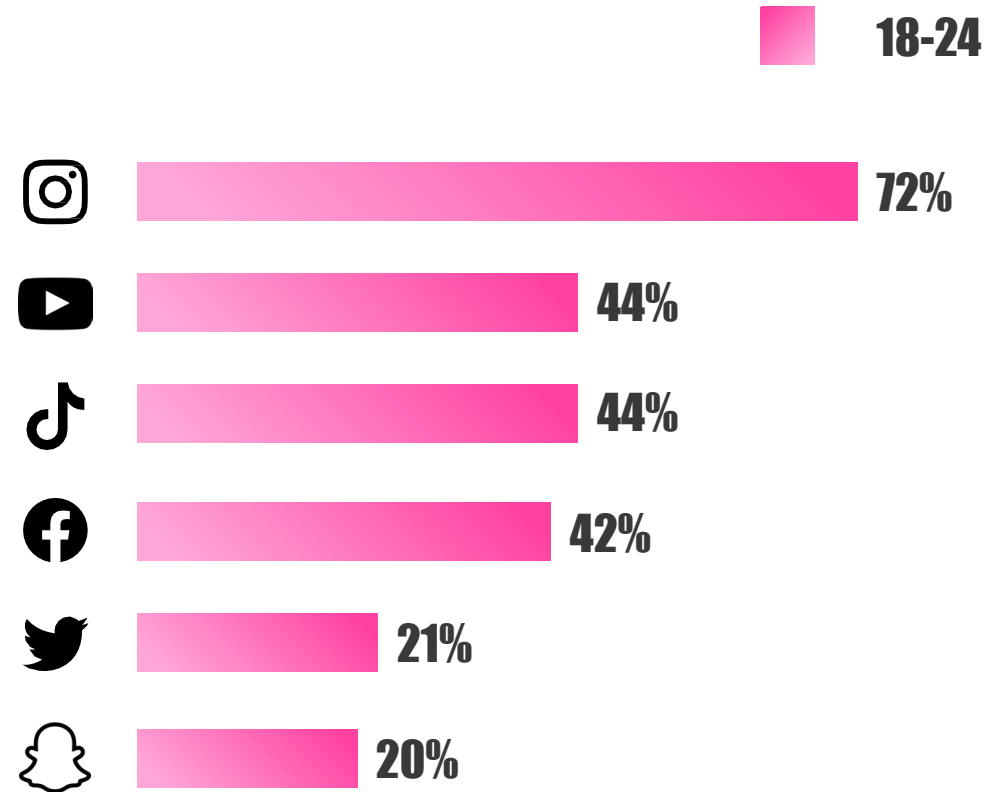
NO. 03

ARTICLES / VIDEOS / TRAILERS ON
SOCIAL MEDIA (26%)
ADVERTISING ON TV (26%)

**SOCIAL APPEAR TWICE IN THE TOP 3 WAYS OF
DISCOVERING TV CONTENT AMONGST 18-24S**

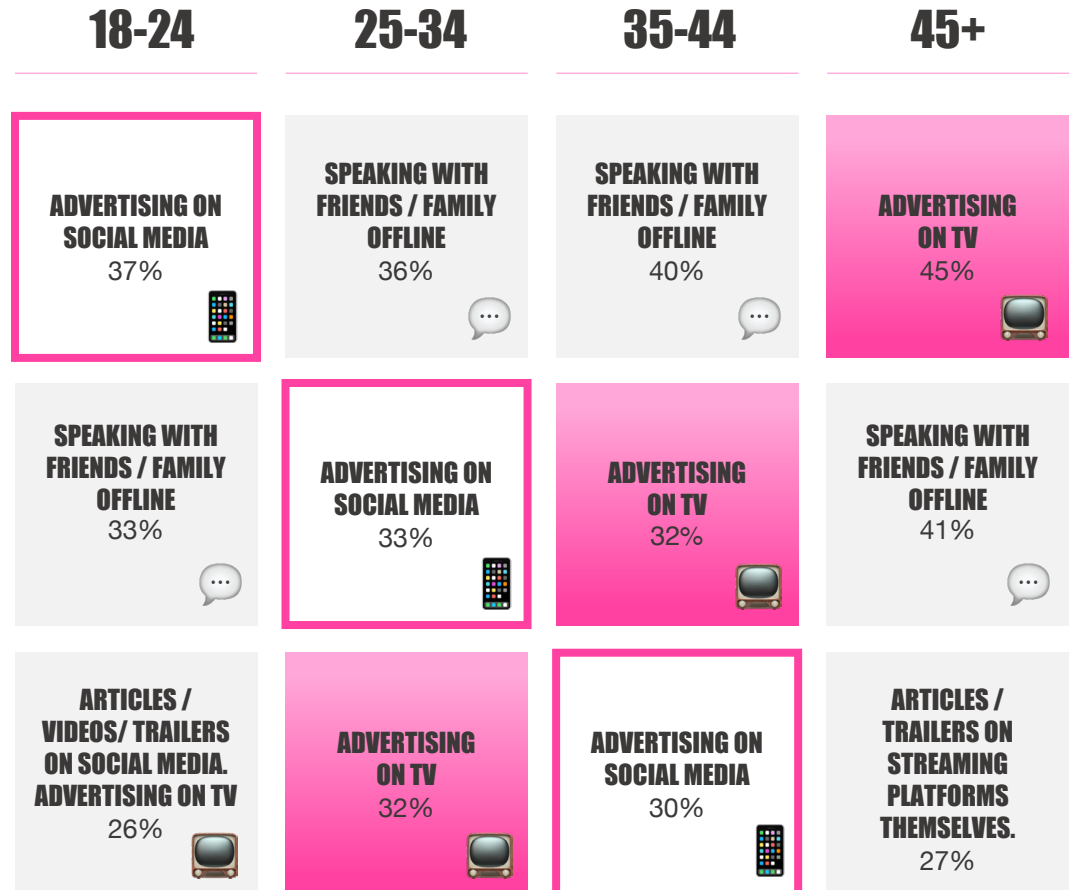
**INSTAGRAM IS THE
MOST INFUENTIAL
PLATFORM, BUT TIKTOK IS
ALREADY NO.2 ALONGSIDE
YOUTUBE FOR GEN-Z**

MOST **INFLUENTIAL SOCIAL PLATFORMS** HELPING PEOPLE DISCOVER CONTENT (TOP 6)



**THERE IS AN INVERSE
RELATIONSHIP BETWEEN
HOW CONTENT IS
DISCOVERED AND AGE**












HOW PEOPLE **DISCOVER CONTENT** (TOP 3)



**YET OFFLINE
CONVERSATIONS
WITH FRIENDS & FAMILY
REMAINS IMPORTANT,
REGARDLESS OF AGE**

HOW PEOPLE **DISCOVER CONTENT** (TOP 3)



18-24	25-34	35-44	45+
ADVERTISING ON SOCIAL MEDIA 37% 	SPEAKING WITH FRIENDS / FAMILY OFFLINE 36% 	SPEAKING WITH FRIENDS / FAMILY OFFLINE 40% 	ADVERTISING ON TV 45% 
SPEAKING WITH FRIENDS / FAMILY OFFLINE 33% 	ADVERTISING ON SOCIAL MEDIA 33% 	ADVERTISING ON TV 32% 	SPEAKING WITH FRIENDS / FAMILY OFFLINE 41% 
ARTICLES / VIDEOS/ TRAILERS ON SOCIAL MEDIA. ADVERTISING ON TV 26% 	ADVERTISING ON TV 32% 	ADVERTISING ON SOCIAL MEDIA 30% 	ARTICLES / TRAILERS ON STREAMING PLATFORMS THEMSELVES. 27%

**SPEAKING WITH FRIENDS/FAMILY OFFLINE ALSO OUTWEIGHS
SPEAKING WITH FRIENDS/FAMILY VIA SOCIAL MEDIA FOR 18-24S**



82%

**OF GEN Z TRUST FRIENDS FOR
RECOMMENDATIONS MORE THAN
THE NETFLIX ALGORITHM**

**DESPITE TRUST IN
FRIENDS & ALGORITHMS,
THEY NEED **HELP** AND ARE
OVERWHELMED**

1 IN 2

**OVERWHELMED BY NUMBER
OF STREAMING SERVICES**

40%

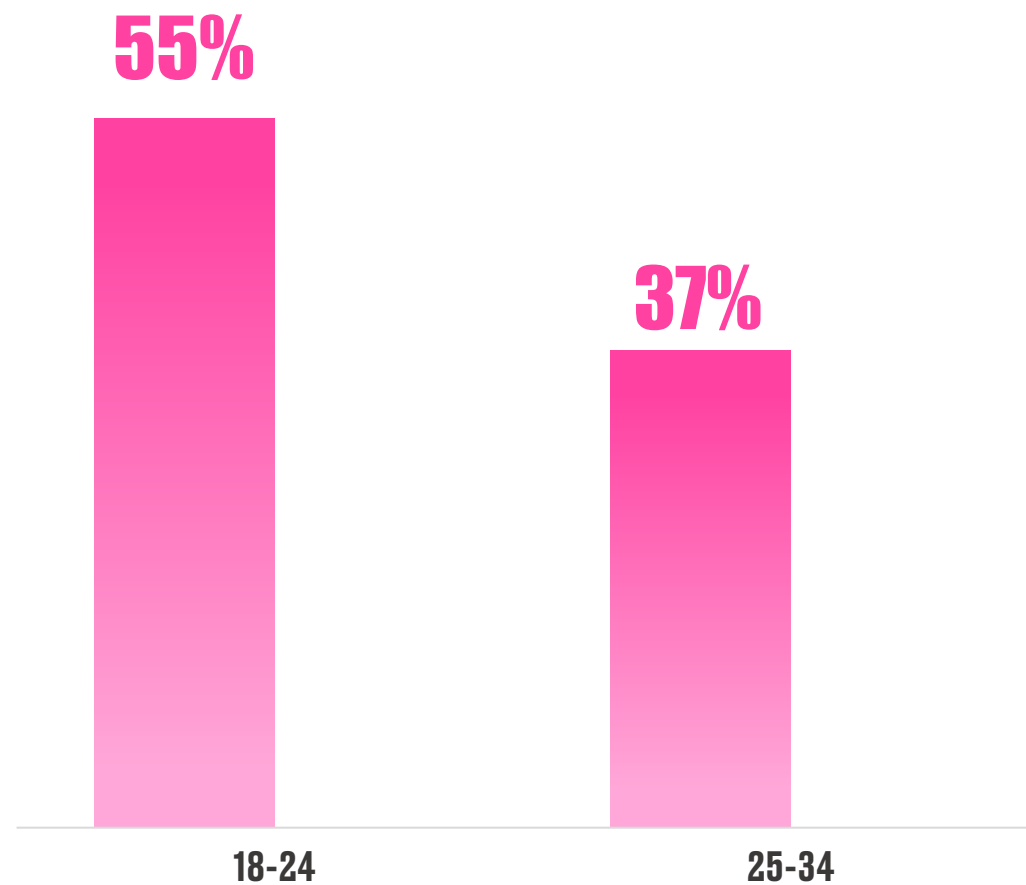
**OVERWHELMED BY THE AMOUNT
OF TV CONTENT THERE IS**

A ROLE FOR CURATION

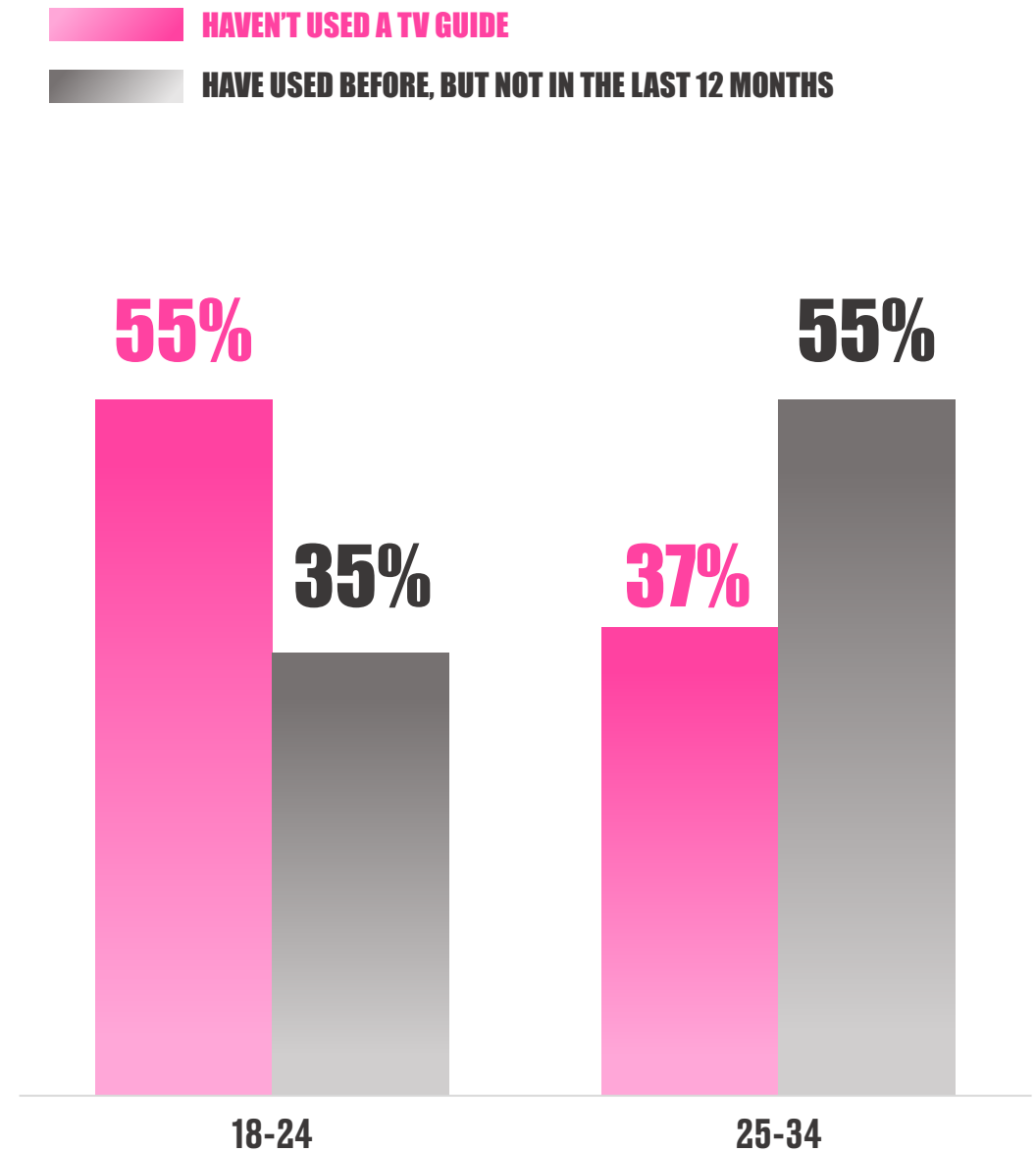
WHAT ABOUT TV GUIDES AND EPGs?

**MORE THAN 1 IN 2
18-24S HAVE NEVER
USED A TV GUIDE**

HAVEN'T USED A TV GUIDE



AND A **LARGE PROPORTION**
OF THOSE WHO HAVE,
HAVEN'T USED IT IN THE
LAST 12 MONTHS



HOWEVER IN ITS
TRADITIONAL FORM
IT DOESN'T WORK

% OF 18-34S WHO DESIRE THE TV GUIDE AS...

NOSTALGIC
52%

“They’re an *important memory* for me, I used to like sitting with my grandad and looking through the magazines whilst he got me to circle what he was watching through the day”

INFORMATIVE
42%

“I didn’t have to search *extensively* to see *what* was on”
“*One place* for the weeks schedule”

HOWEVER IN ITS
TRADITIONAL FORM
IT DOESN'T WORK

% OF 18-34S WHO DESIRE THE TV GUIDE AS...

OUTDATED
51%

“I like seeing what is on during the week, but I don't care for them as I *use mainly ITVHub or Netflix now* so I can choose what I want to watch and when, as well as *accessing live TV.*”

“I used it once because it was *to hand at my Grandma's house,* but *have never got my own.*”

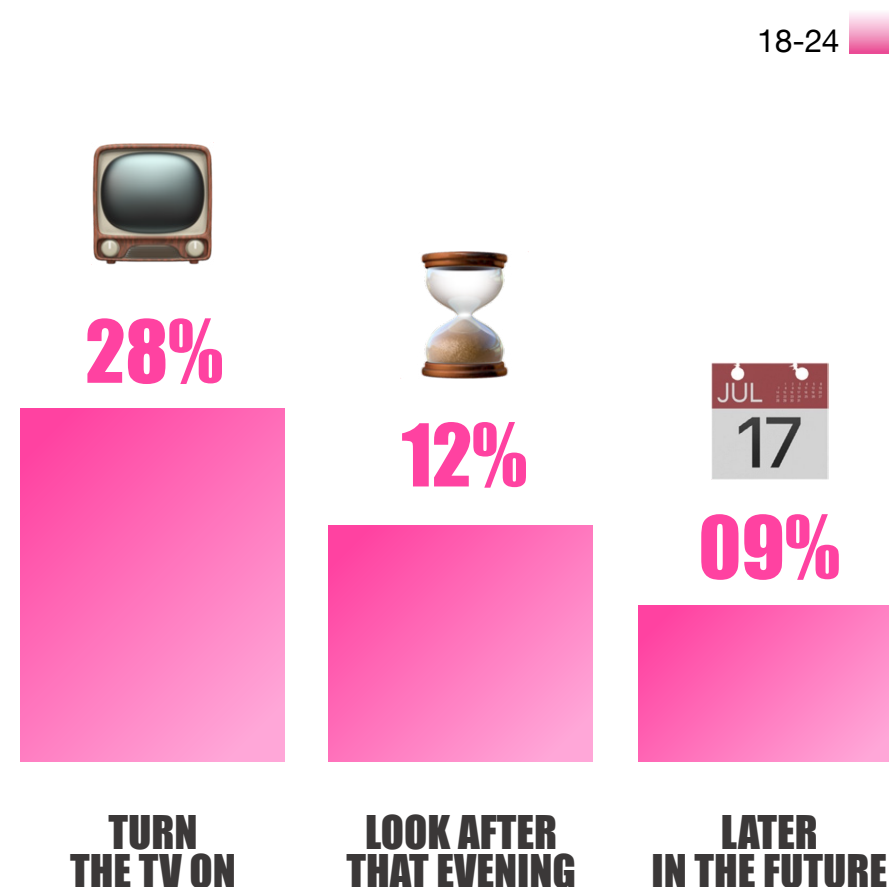
FUN
10%

“Nothing *it was boring* for me so *I never gained interest*”

“I get *bored*”

**THE EPG HAS NOT REPLACED
THE TV GUIDE, ITS MORE AN
IN THE MOMENT PLACE TO
GO WHEN YOU TURN ON
THE TV, RATHER THAN A
DISCOVERY TOOL**

% WHO ALWAYS USE THE EPG TO...



ON AVERAGE EACH PERSON SPENDS

ALMOST FOUR DAYS

A YEAR SEARCHING FOR WHAT TO WATCH



THERE IS A **ROLE** TO SUPPORT PEOPLE FINDING CONTENT

THEY WANT TO WATCH CONTENT, NOT WASTE TIME LOOKING FOR IT.

THEY ARE LOOKING FOR **SOMEONE TO TAKE A LEAD.**

52%

Aged 18-34

**AGREE A BRANDS NEEDS TO
TAKE RESPONSIBILITY TO
CREATE A MODERN TV GUIDE.**

**VERY FEW YOUNG PEOPLE
DON'T THINK THIS IS YOUR ROLE.**

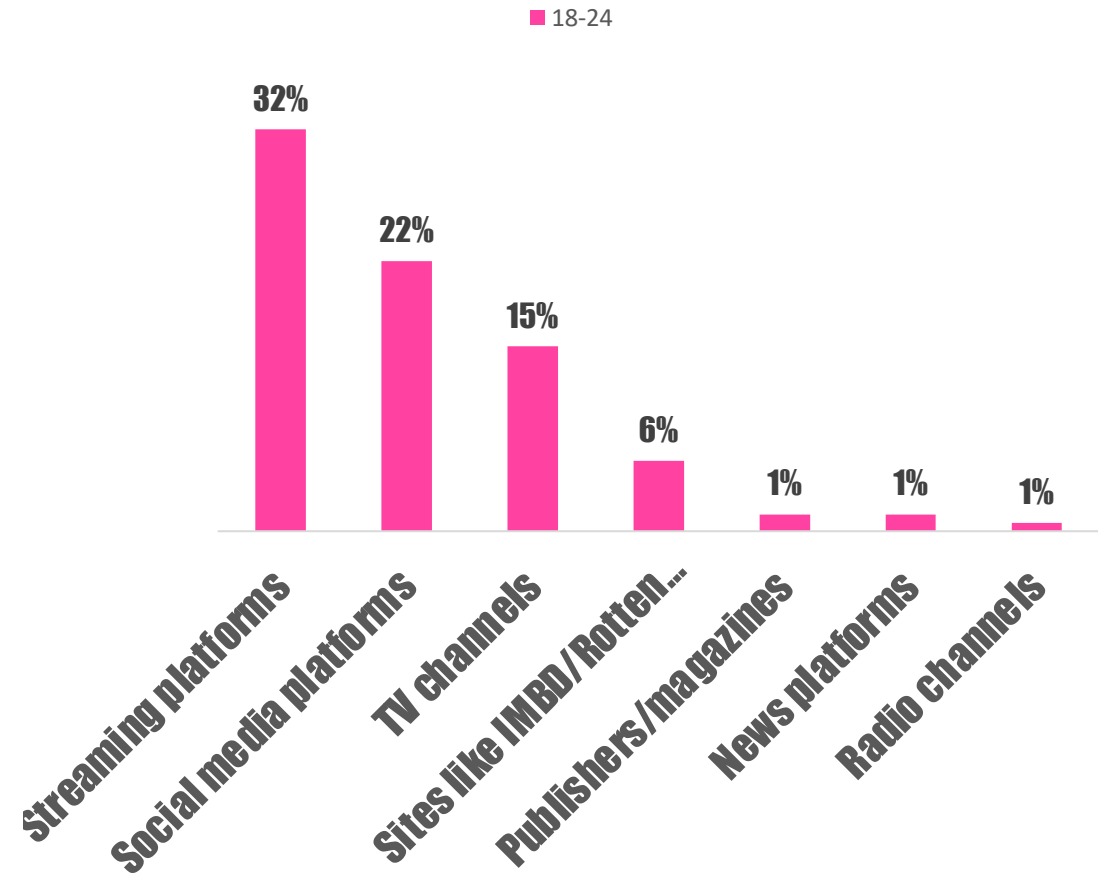
**DON'T THINK IT'S ANYONE'S RESPONSIBILITY
TO HELP ME DISCOVER TV CONTENT % AGREE**

22%

Aged 18-34

**WHIST STREAMING
PLATFORMS ARE THE
NATURAL PLACE TO
HELP PEOPLE DISCOVER
CONTENT, OTHERS CAN
PLAY A ROLE**





% WHO SHOULD BE RESPONSIBLE IN SUPPORTING PEOPLE DISCOVER TV CONTENT



LET'S DISCUSS

**BUT ALMOST THE ALL,
NETFLIX IS THE TOP
TRUSTED ALGORITHM**

ALGORITHMS I TRUST TO RECOMMEND CONTENT I WANT TO WATCH (TOP 4)

NETFLIX	NETFLIX	69%
	DISNEY +	32%
	AMAZON PRIME VIDEO	31%
	BBC IPLAYER	17%
	DON'T TRUT PLATFORMS ALGORITHMS	17%

**17% 18-34S TRUST THE NETFLIX ALGORITHM
MORETHAN THEIR FRIENDS**