SOCIAL MEDIA KILLED THE TV GUIDES

How do younger audiences discover content?

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Director of Data & Intelligence
LADbible Group

LADBIBLE EDINBURGH FESTIVAL 2022

WHY ARE WE FOCUSING ON GEN-Z?

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

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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

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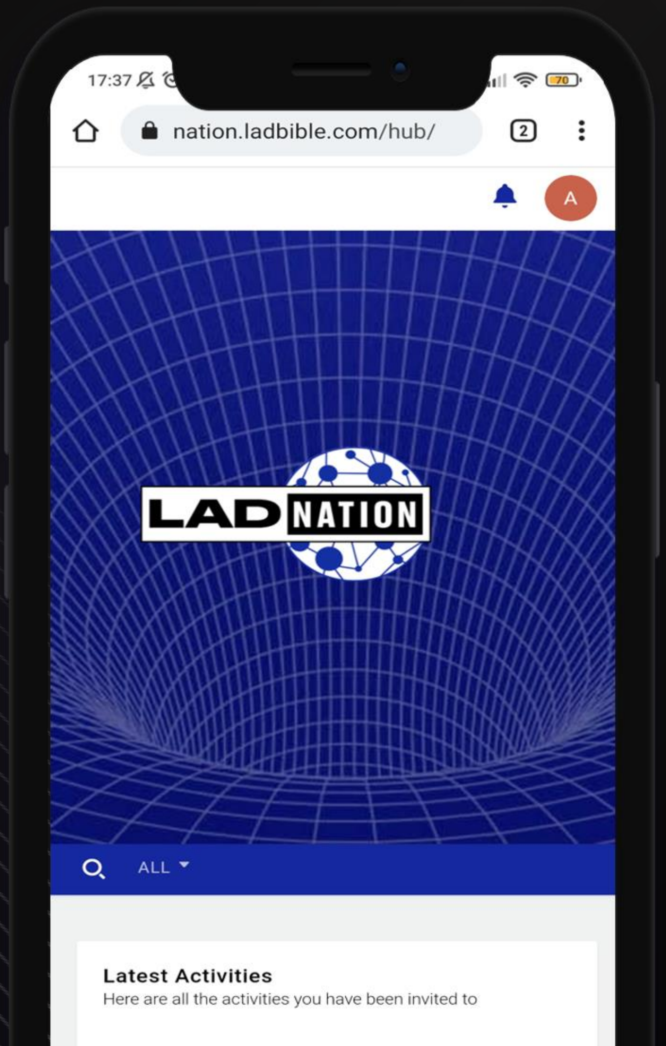
LADBIBLE REACHES THE YOUTH GENERATION AT SCALE.

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 4000 PEOPLE OVER 3 STUDIES...

3,186
of our research community, LADNation.
Aged 18-34

904
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

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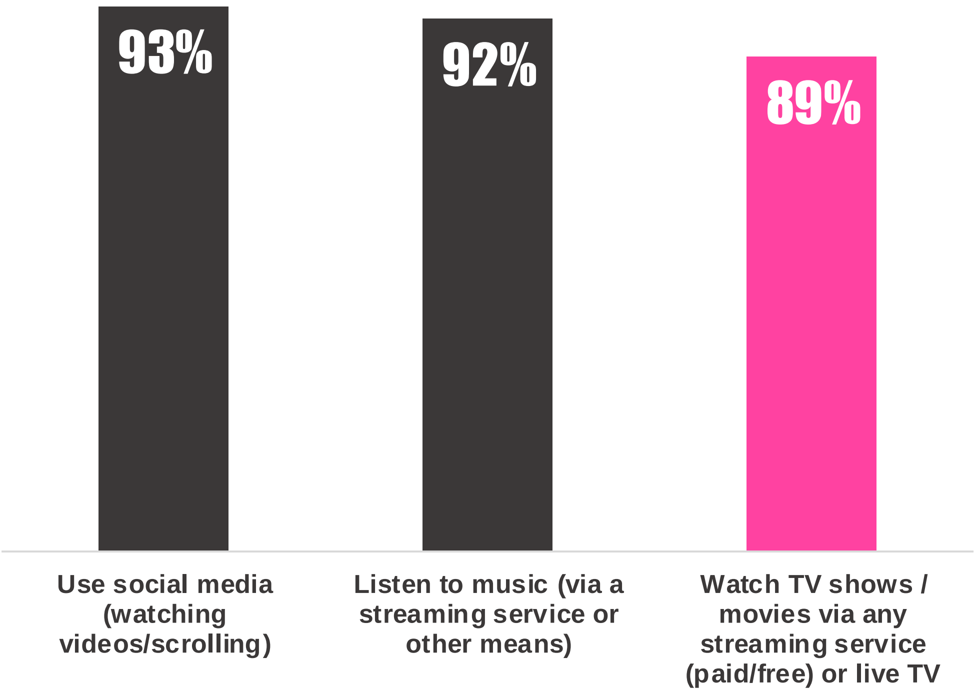
WHAT DO THEY CONSIDER ESSENTIAL IN THEIR LIVES?

	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%

Source: LADbible Group Streaming Study, August 2022

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

% HAVE DONE IN THE LAST WEEK (TOP 3)



Source: LADbible Group Streaming Study, August 2022

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

Source: LADbible Group Streaming Study, August 2022

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

Source: LADbible Group Streaming Study, August 2022

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

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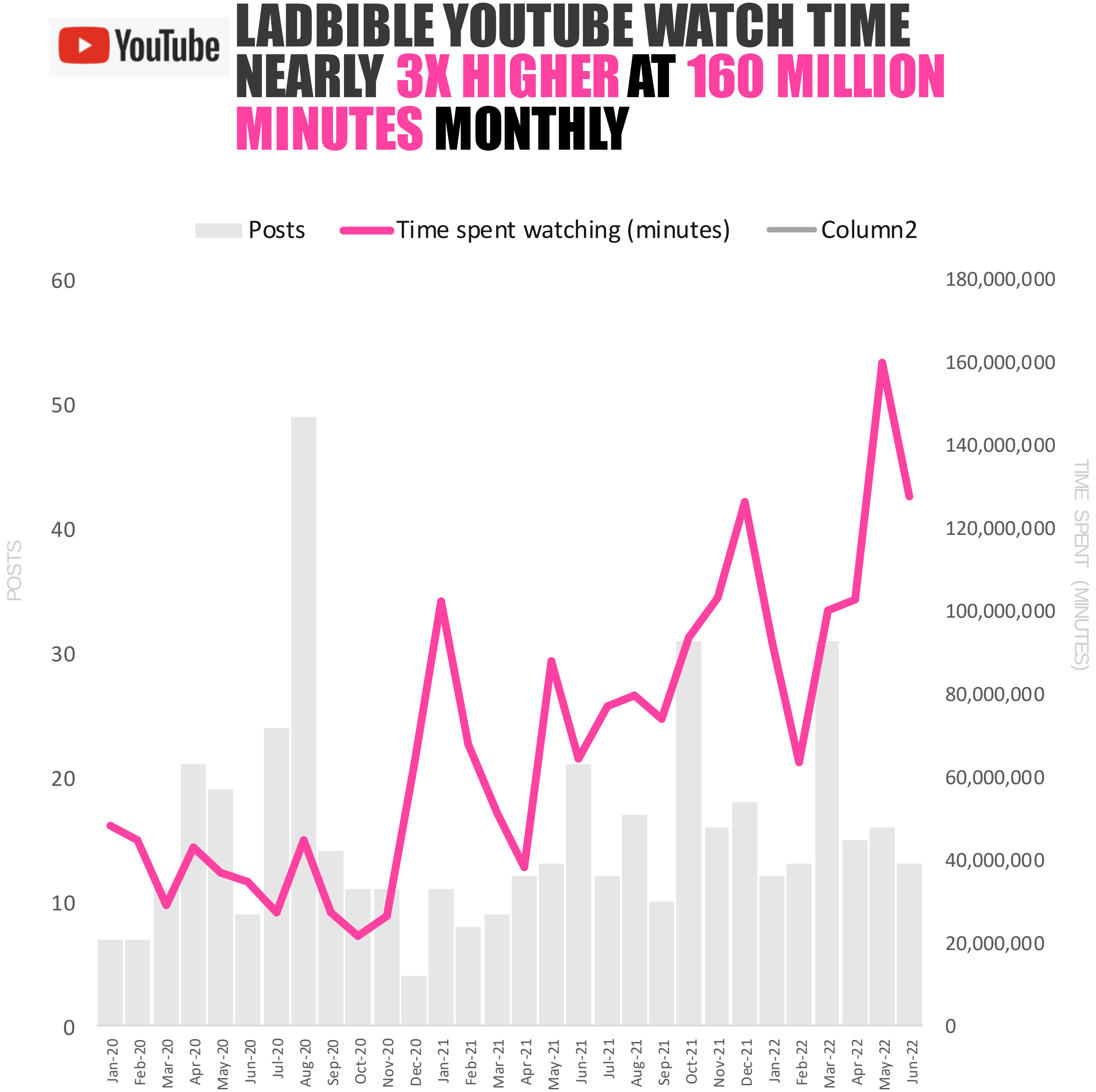
LADBIBLE YOUTUBE WATCH TIME NEARLY 3X HIGHER AT 160 MILLION MINUTES MONTHLY



Source: LADbible Group YouTube w atch time data, Jan 2020 – July 2022

CREATE A NEW ATTENTIVE MINDSET FOR LONGER FORM VIEWING

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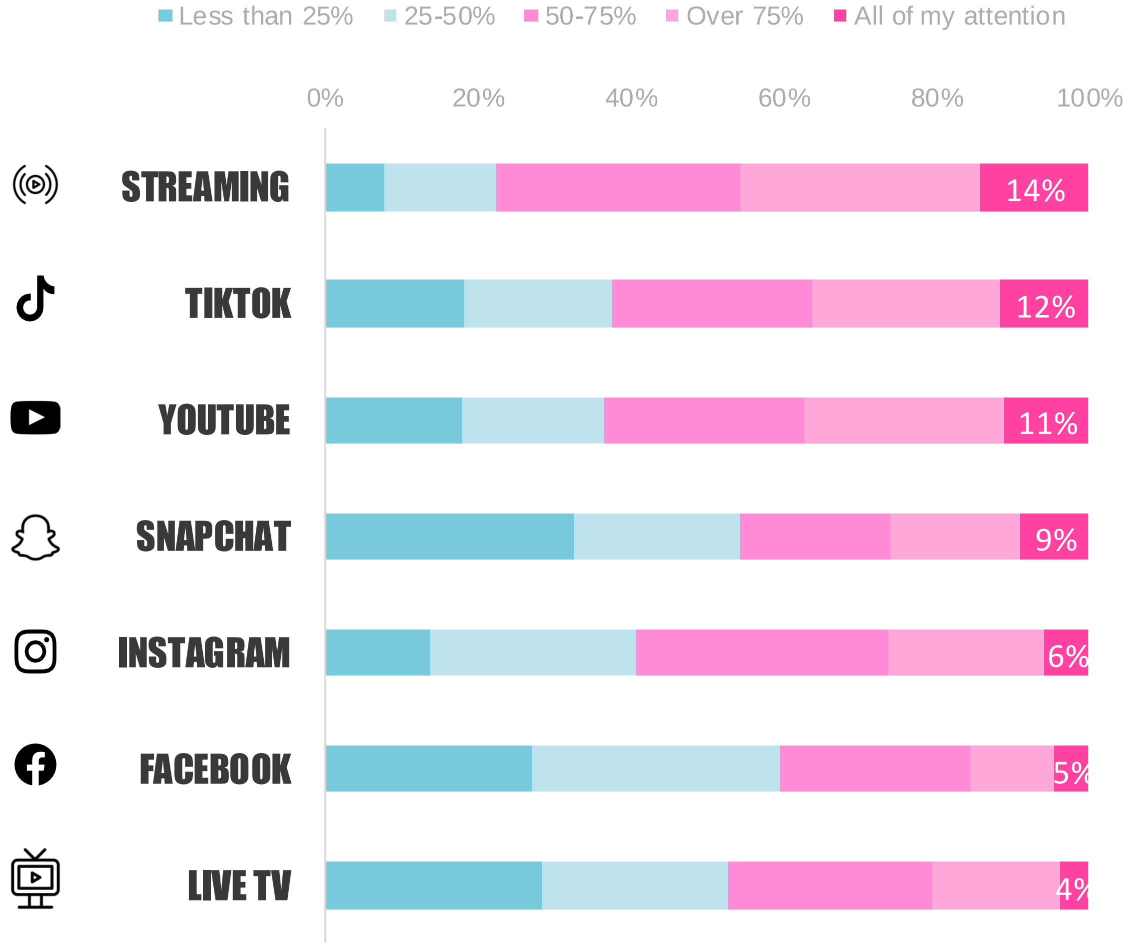
WHERE WOULD YOU GO IN A SPARE HALF AN HOUR?

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

Source: LADbible Group Streaming Study, August 2022

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 CONENT

HOW PEOPLE DISCOVER CONTENT (TOP 3)

18 – 24

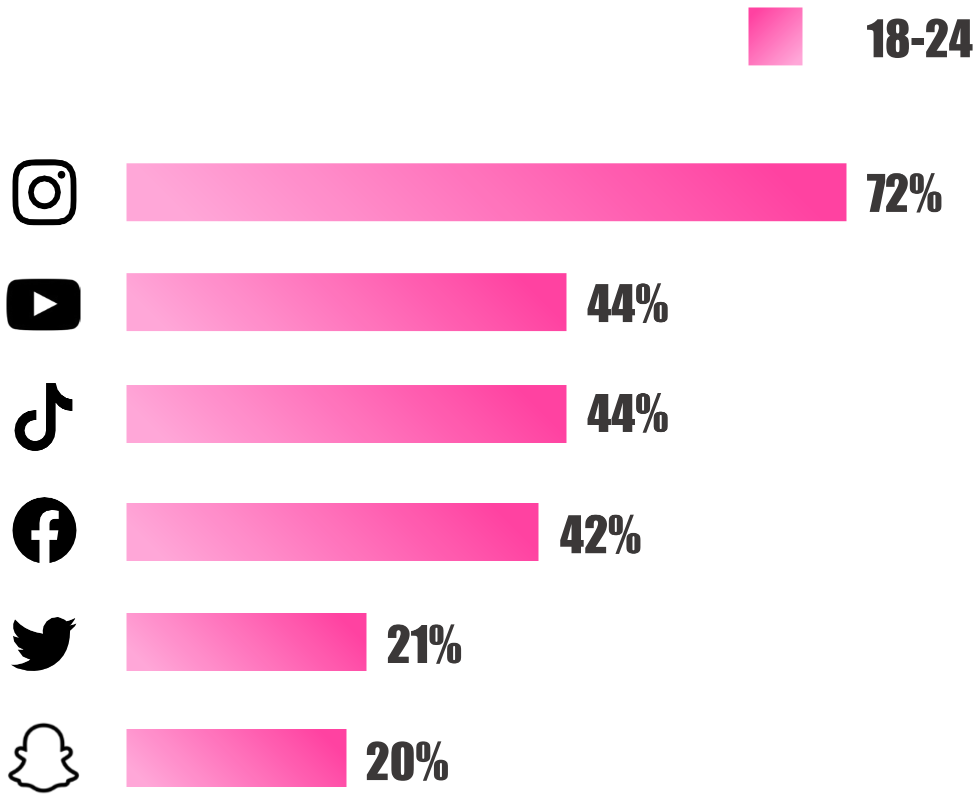
NO. 01	ADVERTISING ON **SOCIAL MEDIA (37%)**
NO. 02	SPEAKING WITH **FRIENDS & FAMILY (33%)**
NO. 03	ARTICLES / VIDEOS / TRAILERS ON **SOCIAL MEDIA (26%)** **ADVERTISING ON TV (26%)**

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

Source: LADbible Group Streaming Study, August 2022

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

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



Source: LADbible Group Streaming Study, August 2022

THERE IS AN INVERSE RELATIONSHIP BETWEEN HOW CONTENT IS DISCOVERED AND 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%

Source: LADbible Group Streaming Study, August 2022

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

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

Source: LADbible Group Streaming Study, August 2022

82%

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

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

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1 IN 2

OVERWHELMED BY NUMBER OF STREAMING SERVICES

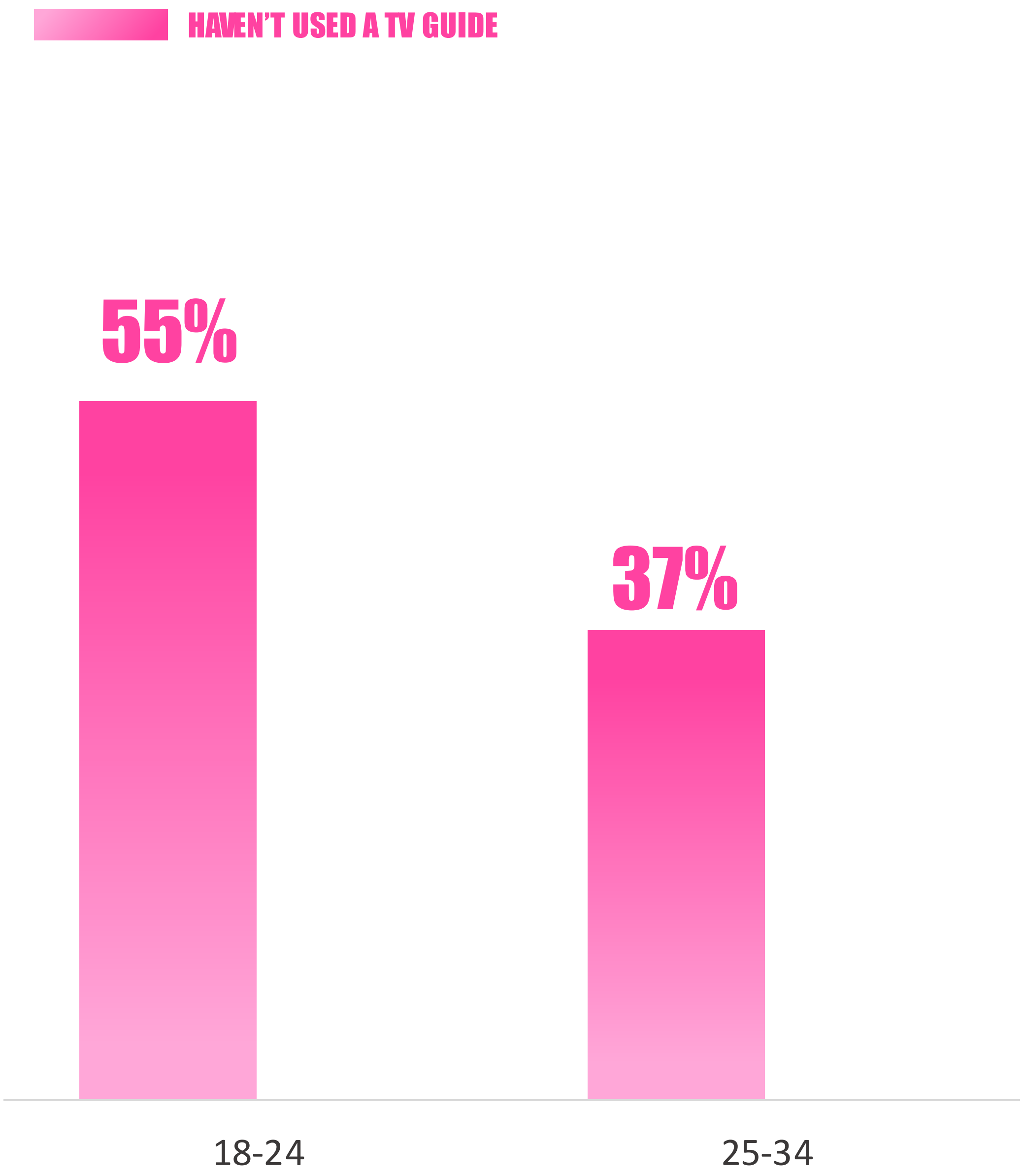
40%

OVERWHELMED BY THE AMOUNT OF TV CONTENT THERE IS

A ROLE FOR CURATION

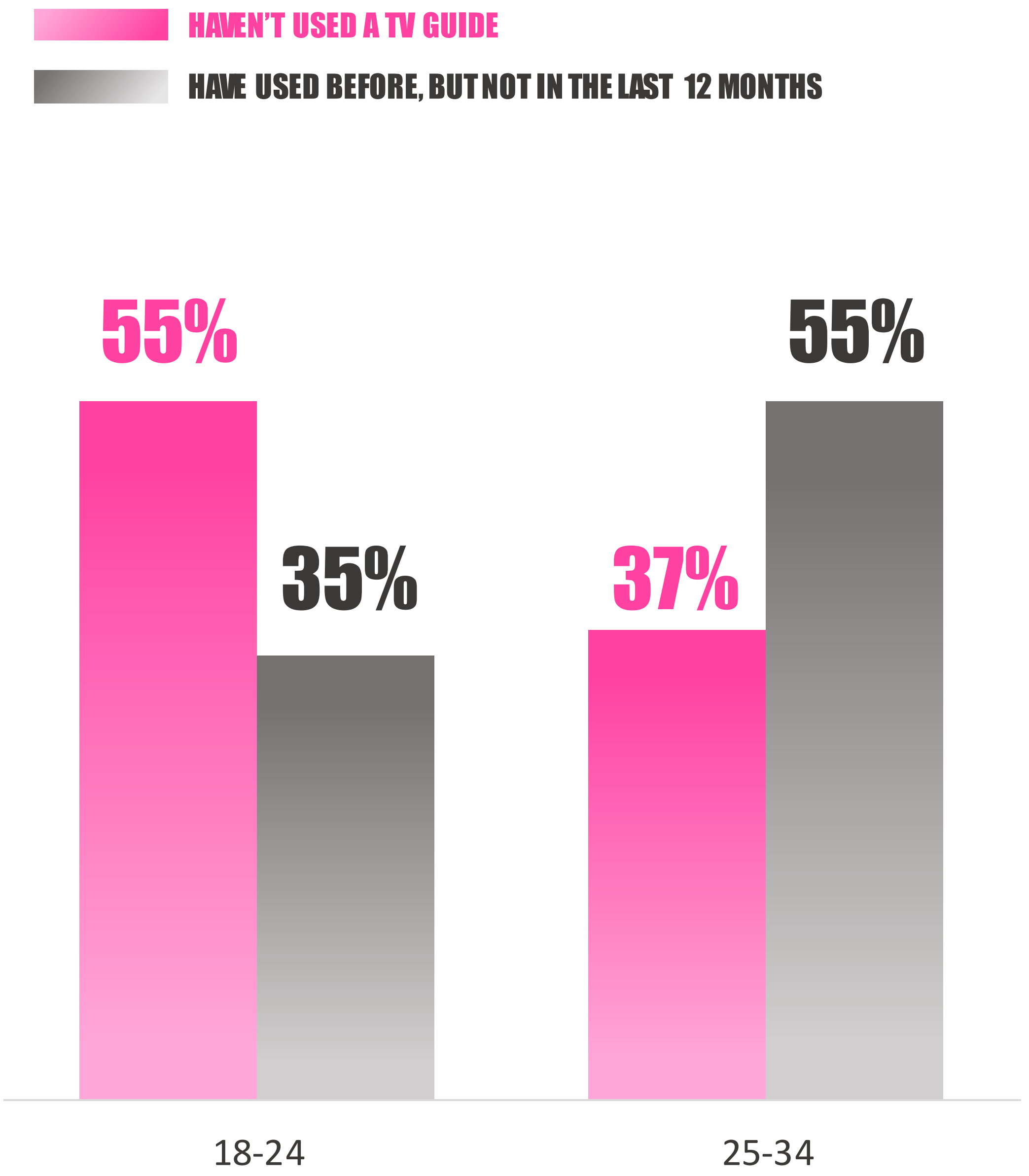
WHAT ABOUT TV GUIDES AND EPGs?

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



Source: LADbible Group Streaming Study, August 2022

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



Source: LADbible Group Streaming Study, August 2022

HOWEVER IN ITS TRADITIONAL FORM IT DOESN'T WORK

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% 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"

IMFORMATIVE
42%

"I didn't have to search extensively to see what was on"

"One place for the weeks schedule"

Source: LADbible Group Streaming Study, August 2022

HOWEVER IN ITS TRADITIONAL FORM IT DOESN'T WORK

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% 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%

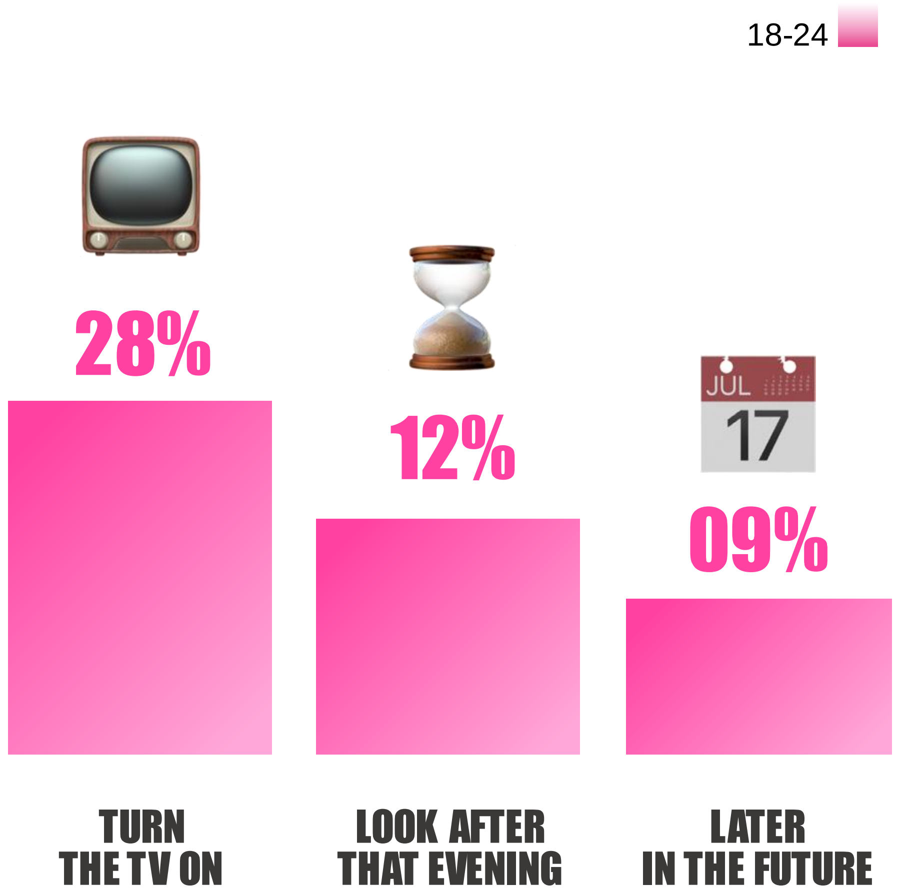
"Nothing it was boring for me so I never gained interest"

"I get bored"

Source: LADbible Group Streaming Study, August 2022

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...



Source: LADbible Group Streaming Study, August 2022

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 WANY 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.

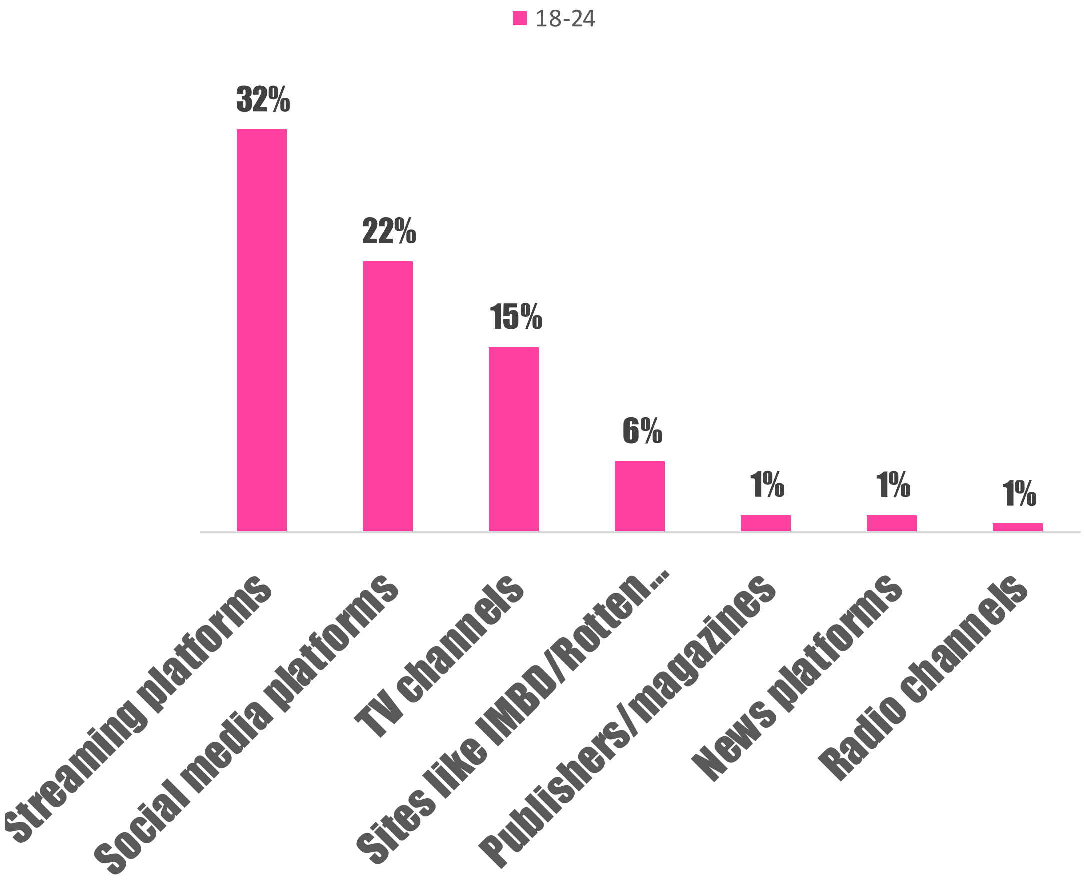
VERY FEW YOUNG PEOPLE DON'T THINK THIS IS YOUR ROLE.

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



Source: LADbible Group Streaming Study, August 2022

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+	DISNEY +	32%
prime video	AMAZON PRIME VIDEO	31%
BBC iPlayer	BBC IPLAYER	17%
	DON'T TRUT PLATFORMS ALGORITHMS	17%

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

Source: LADbible Group Streaming Study, August 2022