

15th
ANNIVERSARY

HDFI • 2021 ANNUAL CONFERENCE

15° Years Anniversary

Rome, 4 November 2021



Content: evolutionary models for a generational audience

Astrid de Berardinis
ViacomCBS Global Distribution Group

50s-70s

- Broadcast as a Flow

70s-90s

- The Flow becomes User generated – requires active selection (Channels, programs multiplying)
- Narrowcasting
- Programming based vs. viewer-centred model

90s – to date

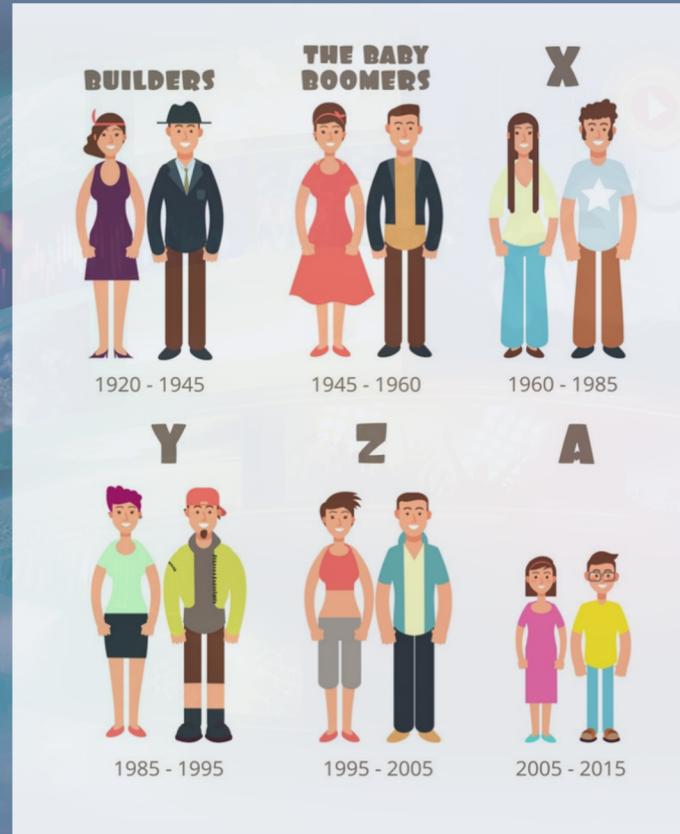
- New TV system
- Multiplatform
- Multidevice
- TV content becomes participative (cut, remix, share) moving towards social television – public engagement
- Timeshifting and Placeshifting
- From broadcasting to personcasting
- Generational shift: technological competency /economical availability/ spending habits and cultural divide

Generational shift + increased media fragmentation



Which channels and creative ideas are best used to reach and engage target audiences?

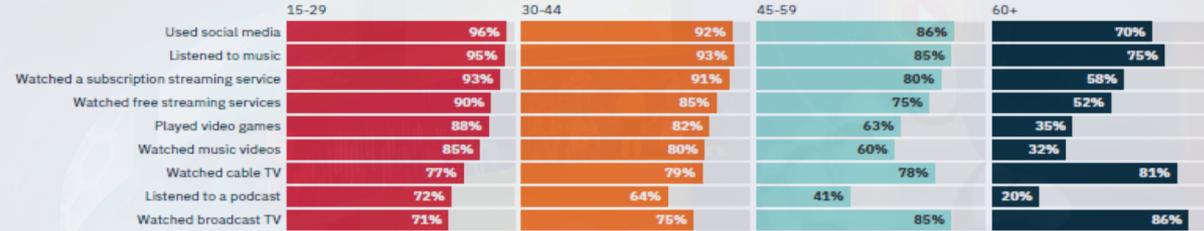
Generational audiences – Who are they?



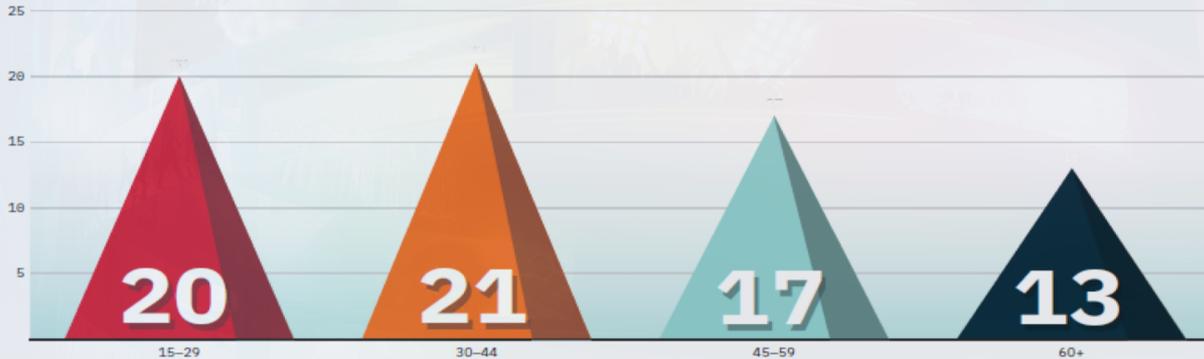
What Media Mix for each generation (US market)?

Entertainment Formats Used in Past Week

Question: Which of these did you do at least 30 minutes in the last week?



Mean Number of Major Entertainment Platforms Used in a Week



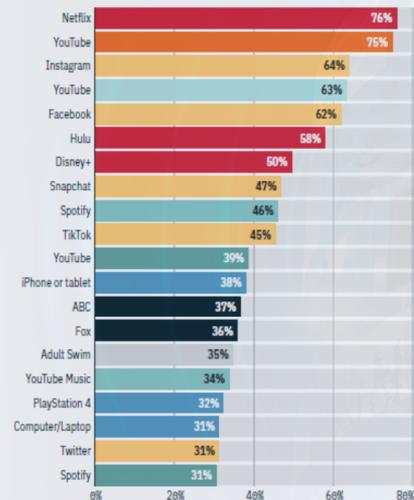
SOURCE: GETWIZER CONSUMER INSIGHTS; ATA FIELDLED JULY 2021 TO U.S. RESIDENTS: P15-29 (N=285); P30-44 (N=391); P45-59 (N=341); P60+ (N=467)

What brands for each generation ? (US Market)

Top 20 Platforms: 15-29

Question: Which of these did you listen to/use at least 30 minutes in the last week?

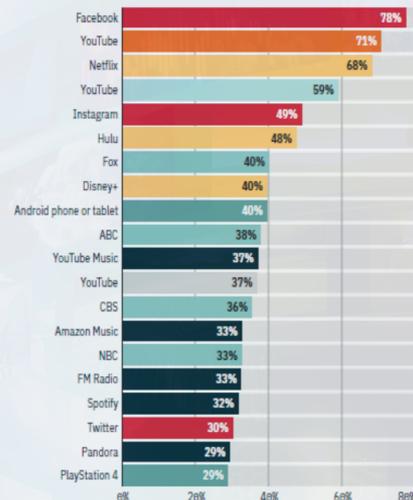
- Subscription Streaming
- Music Videos
- Social Media
- Free Streaming
- Music
- Podcasts
- Video Games
- Broadcast TV
- Cable TV



Top 20 Platforms: 30-44s

Question: Which of these did you listen to/use at least 30 minutes in the last week?

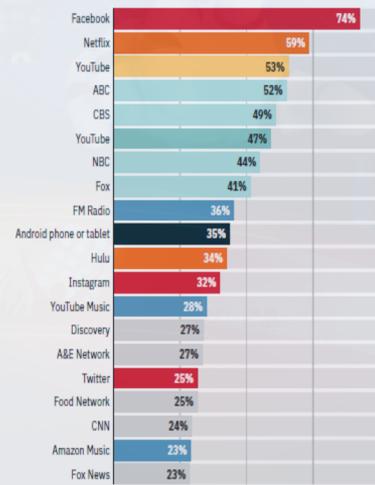
- Social Media
- Music Videos
- Subscription Streaming
- Free Streaming
- Broadcast TV
- Video Games
- Music
- Podcasts



Top 20 Platforms: 45-59s

Question: Which of these did you listen to/use at least 30 minutes in the last week?

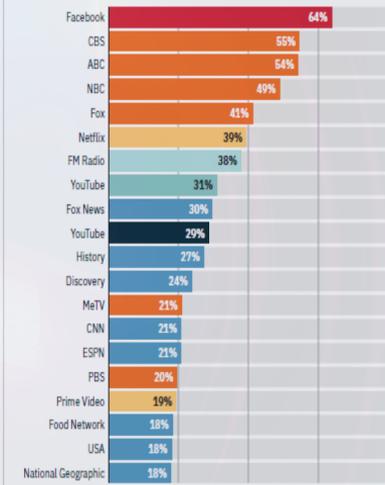
- Social Media
- Subscription Streaming
- Music Videos
- Broadcast TV
- Free Streaming
- Music
- Video Games
- Cable TV



Top 20 Platforms Used in Past Week: 60+

Question: Which of these did you listen to/use at least 30 minutes in the last week?

- Social Media
- Broadcast TV
- Subscription Streaming
- Music
- Free Streaming
- Cable TV
- Music Videos

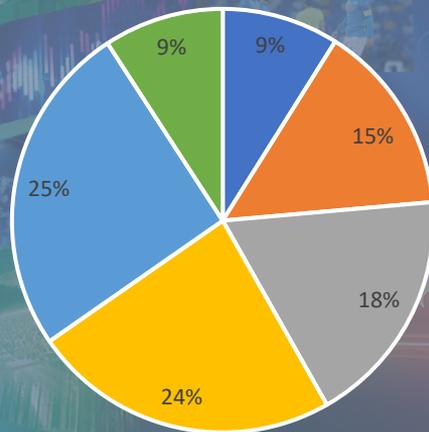


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Sizing generations in Italy

Italy - residents by Generation as of 2021 (ISTAT)



- GEN ALPHA
post 2010
- GEN Z (Postmillenials)
1996-2010
- GEN Y (Millenials)
1980-1995
- GEN X
1965-1979
- BABY BOOMERS
1946-1964
- SILENT GENERATION
1928-1945

Silent – Baby Boomers and Gen X in Italy watch:

Traditional Broadcasters /Free TV

- Local Fiction Production driven by target audience of primary channels
- Live events/Sports Key
- News/Factual Key
- Acquisitions focusing on long running, procedurals

Trying to retain Gen X and attract younger audience (Gen Y and Gen Z) with their own catch-up/Avod services.

Generation X, Y and Z in Italy consume:

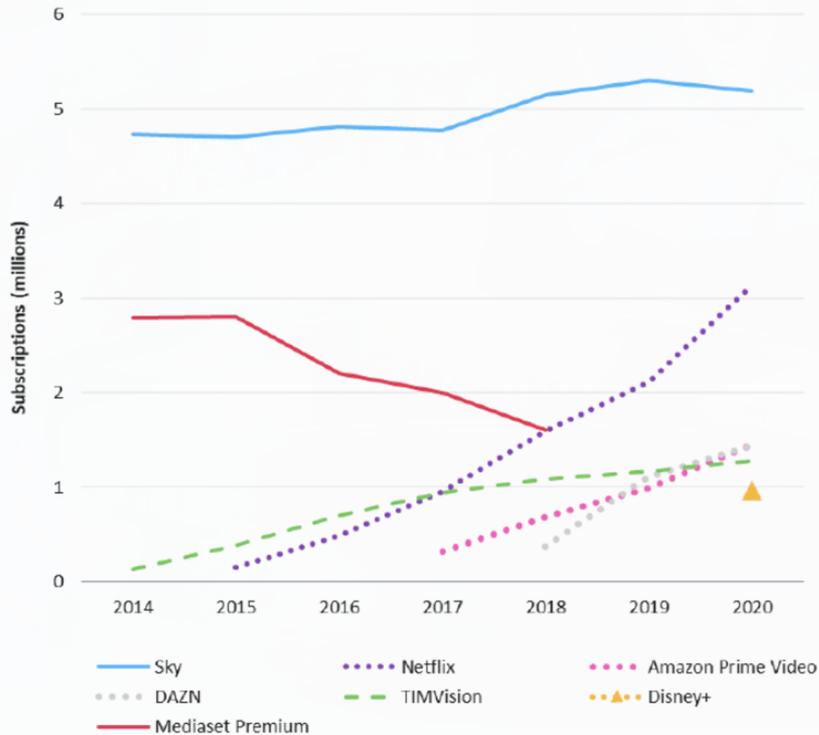
Pay Tv and OTT

- SKY and Telcos such as TIM turn into superaggregators
- Battle to secure Sport events
- ORIGINAL PRODUCTION becomes Key
- Local is the new Global
- Global becomes Local
- Multiplatform/social engagement
- Serialized Fiction
- Boxsetting

Gen Z is the new frontier, volatile, consumes user generated – next challenge?

Italy Pay and OTT: Subscription trend overview (1/6)

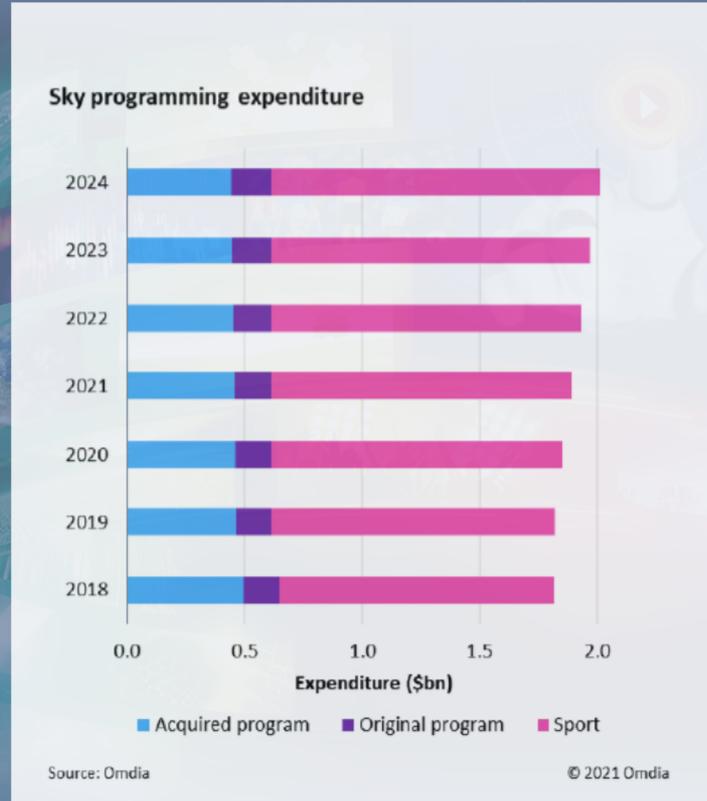
Leading Italian pay-TV and OTT video providers by subscriptions, 2014–20



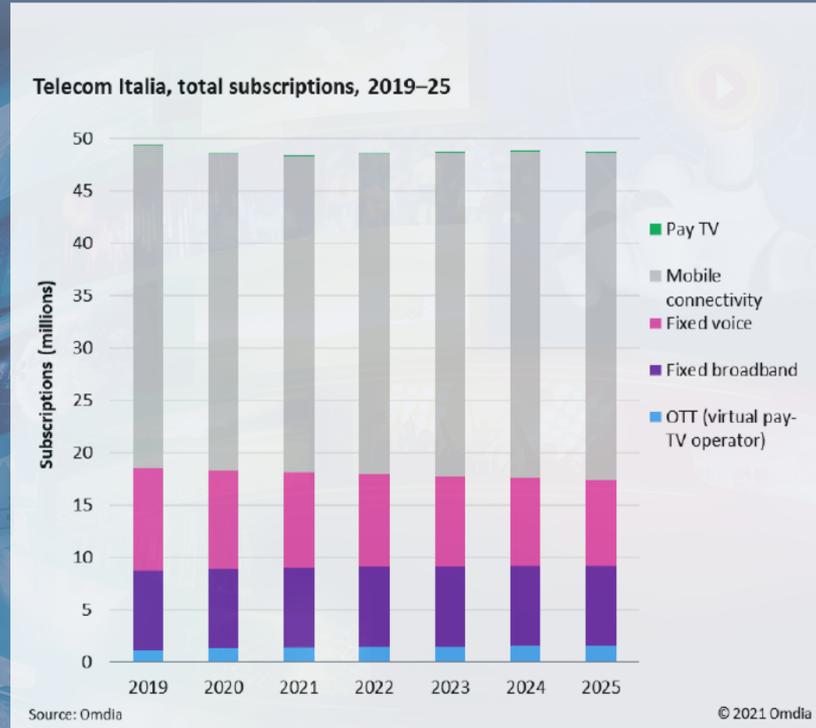
Source: Omdia

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Italy Pay and OTT: Sky doubles content production (2/6)

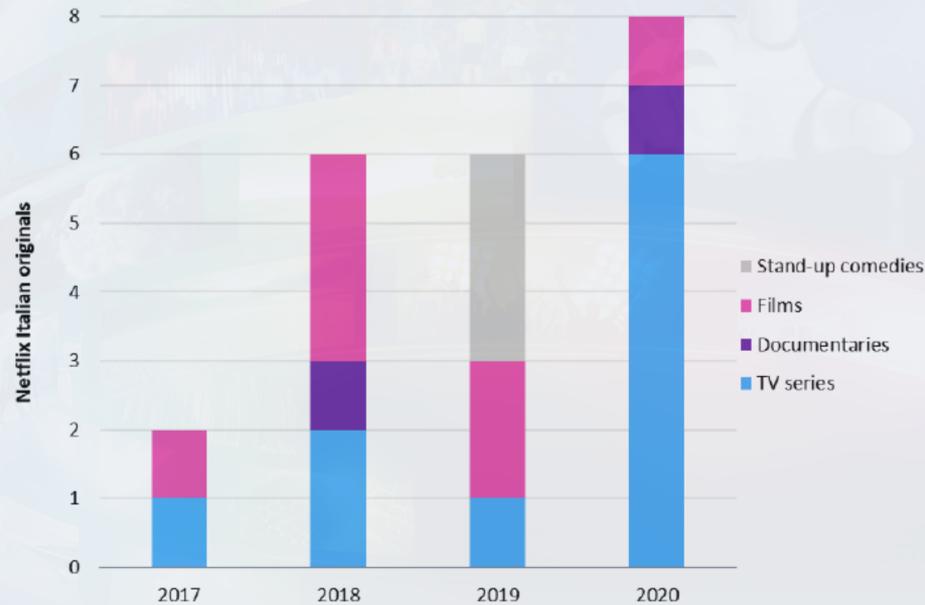


Italy Pay and OTT: Telecom moves into aggregating (3/6)



Italy Pay and OTT: Netflix grows Italian production (4/6)

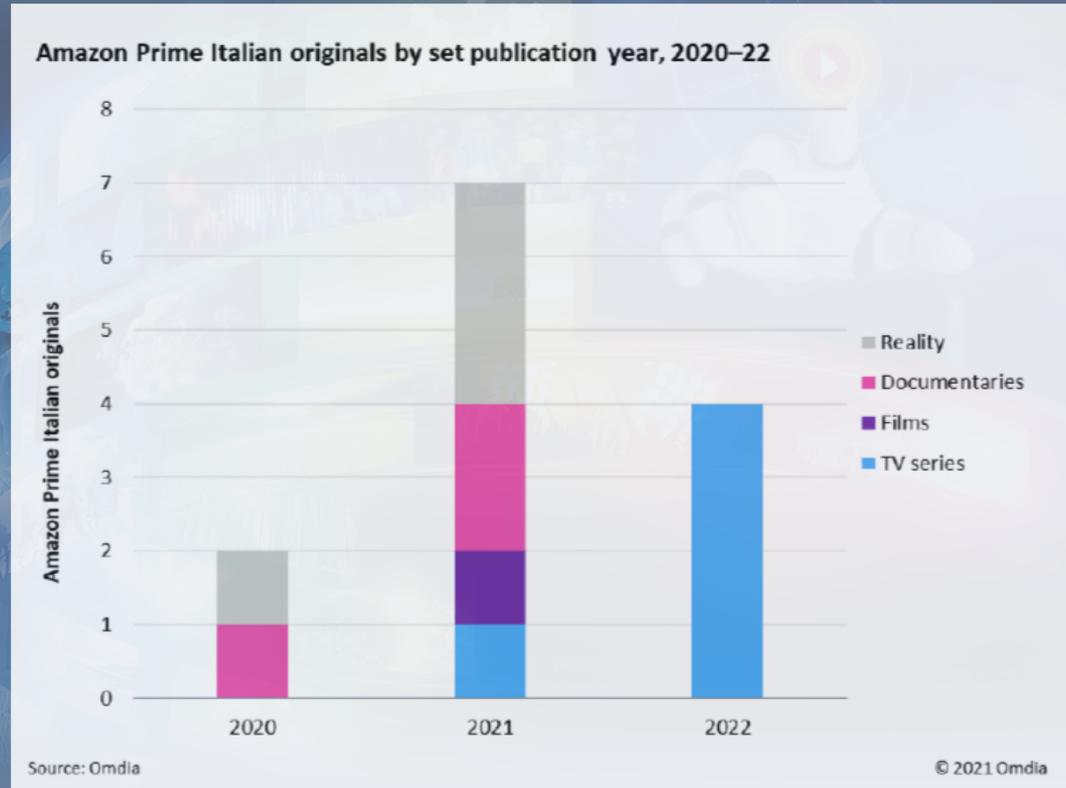
Netflix Italian originals by publication year, 2017–20



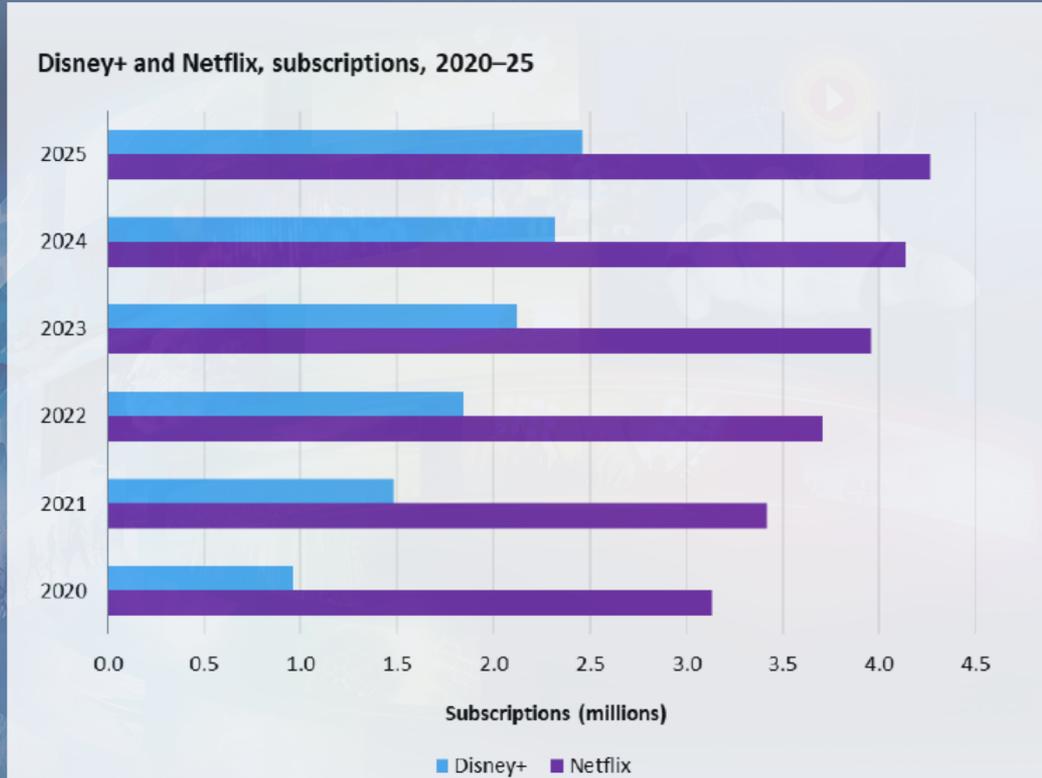
Notes: Inclusive of series renewals
Source: Omdia

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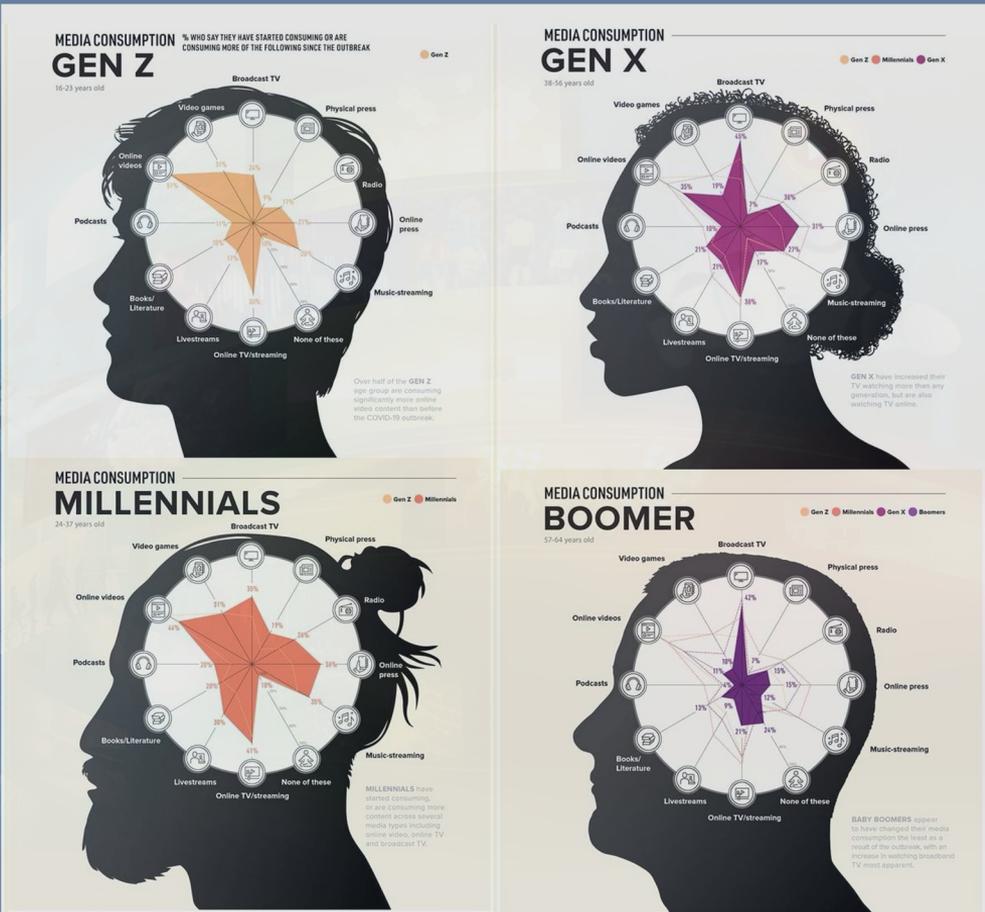
Italy Pay and OTT: Amazon & the hyperlocal shows (5/6)



Italy Pay and OTT: Disney + steams ahead (6/6)



The Covid effect – changing generational habits?





THANK YOU