



HDFI • 2021 ANNUAL CONFERENCE

15° Years Anniversary

Rome, 4 November 2021



Content: evolutionary models for a generational audience

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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

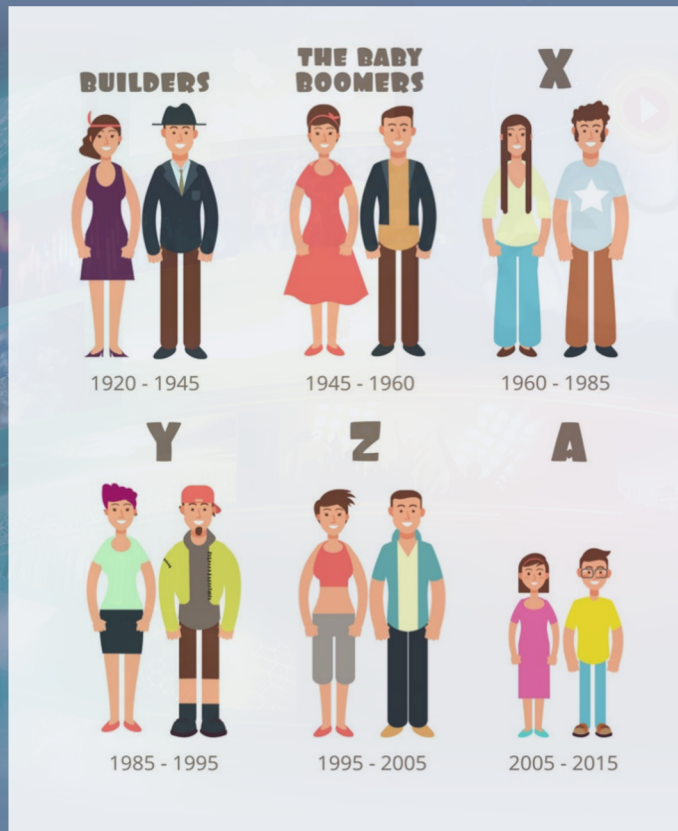
- New TV system
- Multiplatform
- Multidevice
- TV content becomes participative (cut, remix, share) moving towards social television – public engagement
- Timeshifting and Placeshifting
- From broadcasting to personcasting
- Generational shift: technological competency /economical availability/ spending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

Generational shift + increased media fragmentation



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

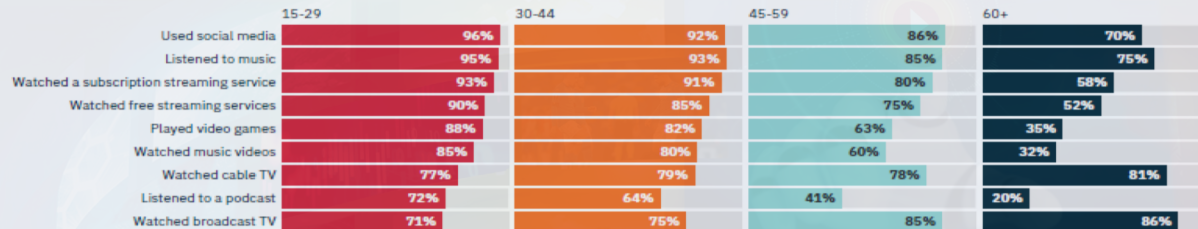
Generational audiences – Who are they?



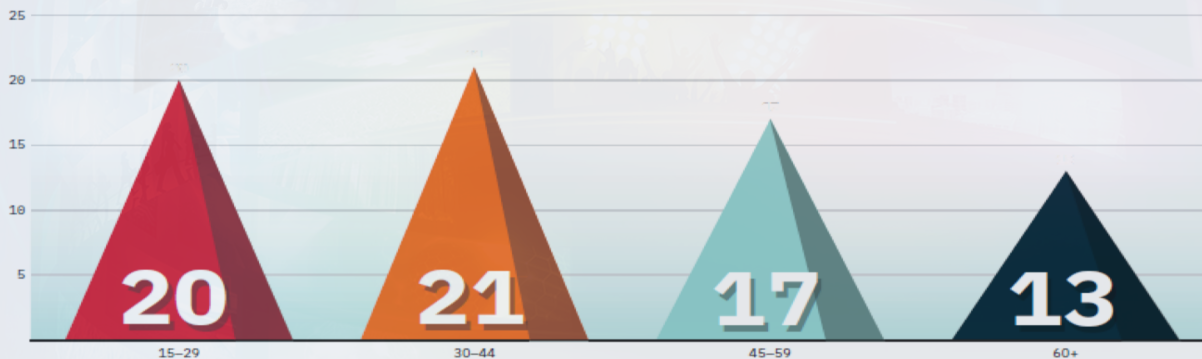
What Media Mix for each generation (US market)?

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



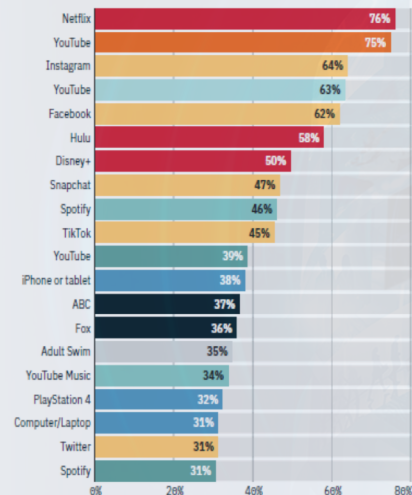
SOURCE: GETWIZER CONSUMER INSIGHTS; ATA FIELDIED JULY 2021 TO U.S. RESIDENTS: P15-29 (N=285); P30-44 (N=391); P45-59 (N=341); P60+ (N=467)

What brands for each generation ? (US Market)

Top 20 Platforms: 15-29s

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

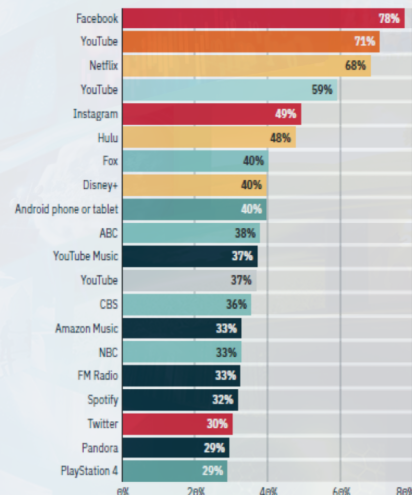
● Subscription Streaming ● Music Videos ● Social Media ● Free Streaming ● Music ● Podcasts ● Video Games ● Broadcast TV ● Cable TV



Top 20 Platforms: 30-44s

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

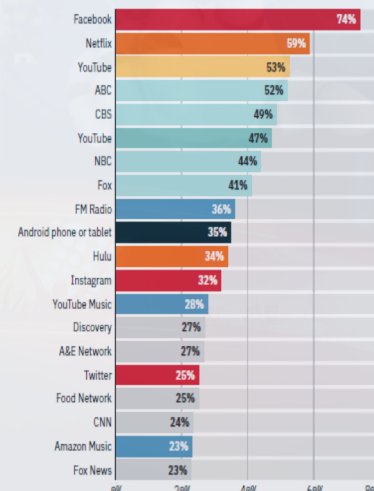
● Social Media ● Music Videos ● Subscription Streaming ● Free Streaming ● Broadcast TV ● Video Games ● Music ● Podcasts



Top 20 Platforms: 45-59s

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

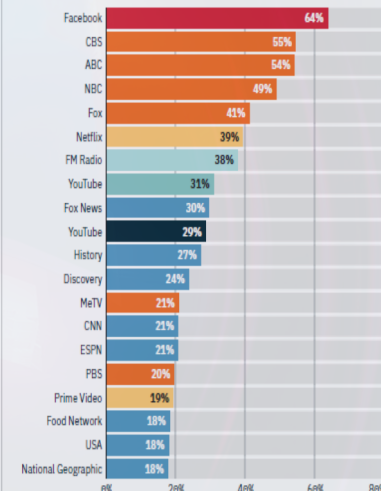
● Social Media ● Subscription Streaming ● Music Videos ● Broadcast TV ● Free Streaming ● Music ● Video Games ● Cable TV



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

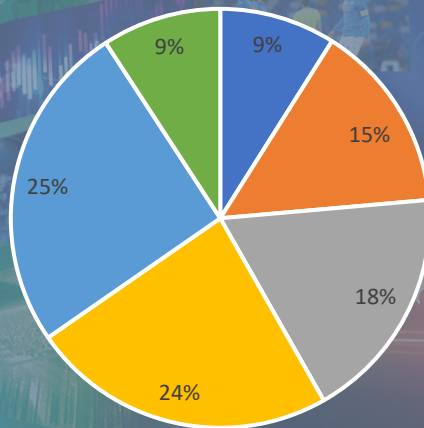


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Sizing generations in Italy

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.

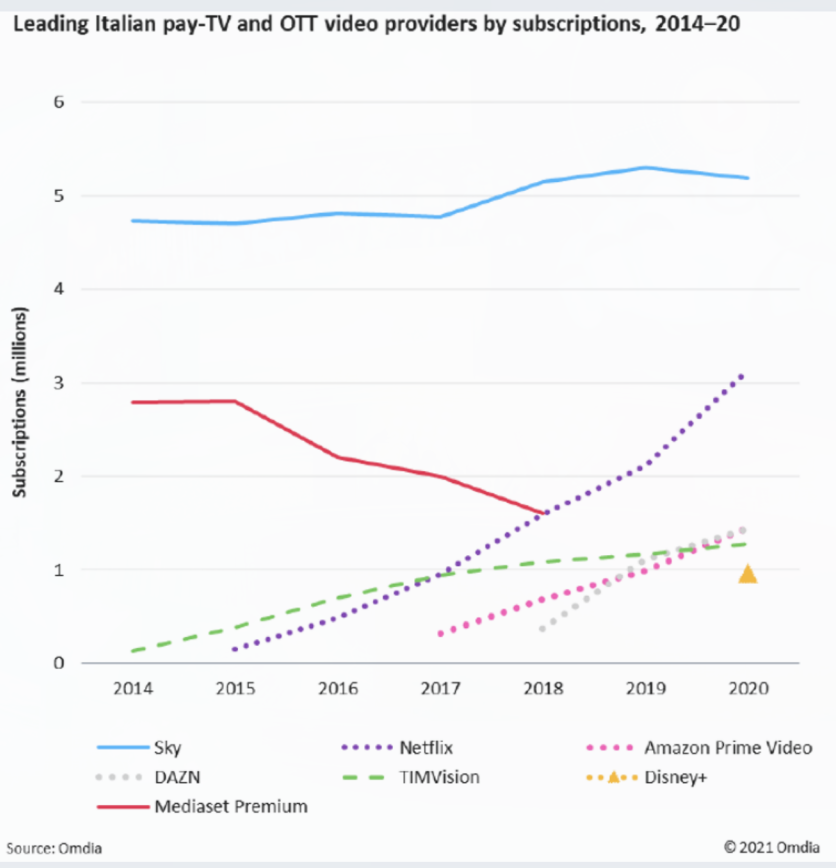
Generation X, Y and Z in Italy consume:

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?

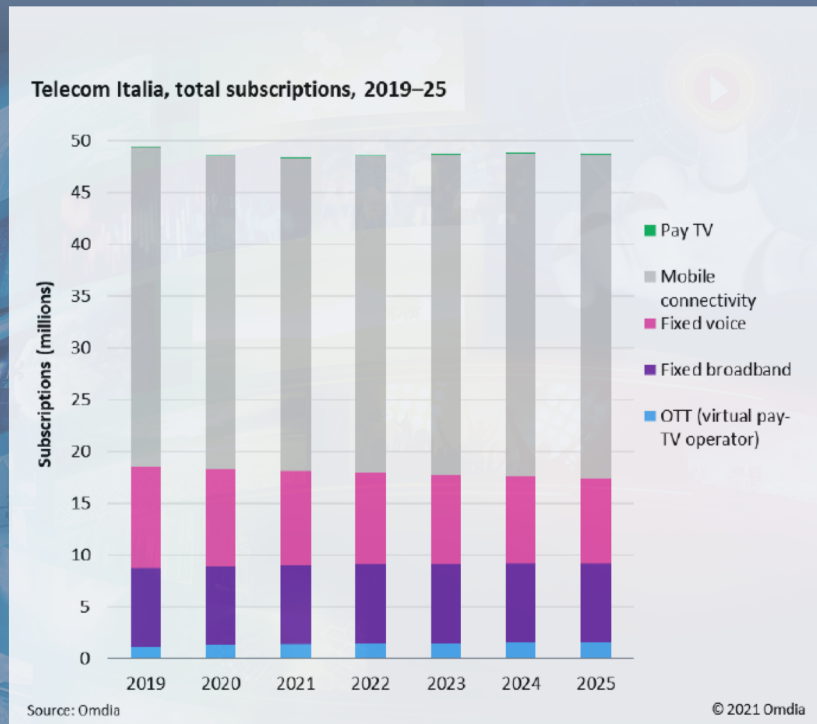
Italy Pay and OTT: Subscription trend overview (1/6)



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

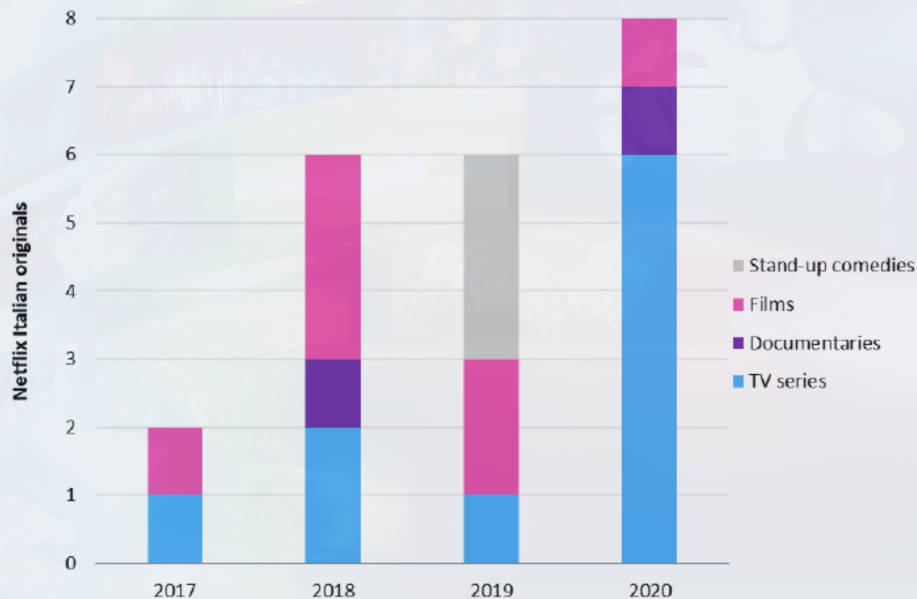


Italy Pay and OTT: Telecom moves into aggregating (3/6)



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

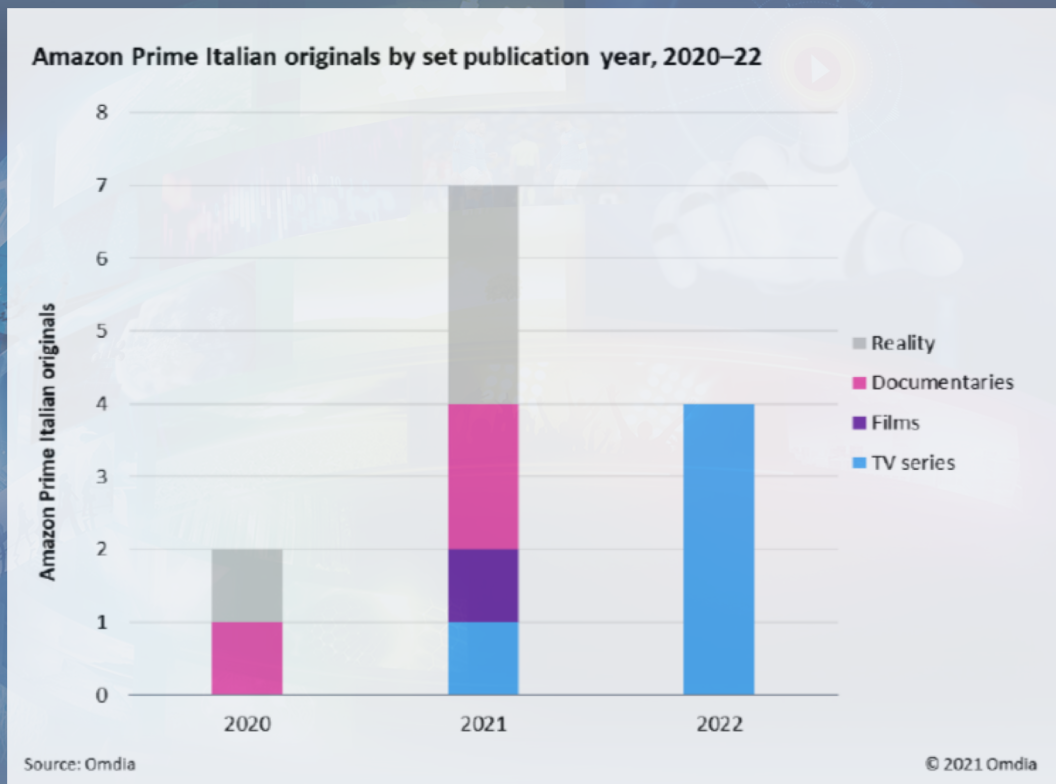
Netflix Italian originals by publication year, 2017–20



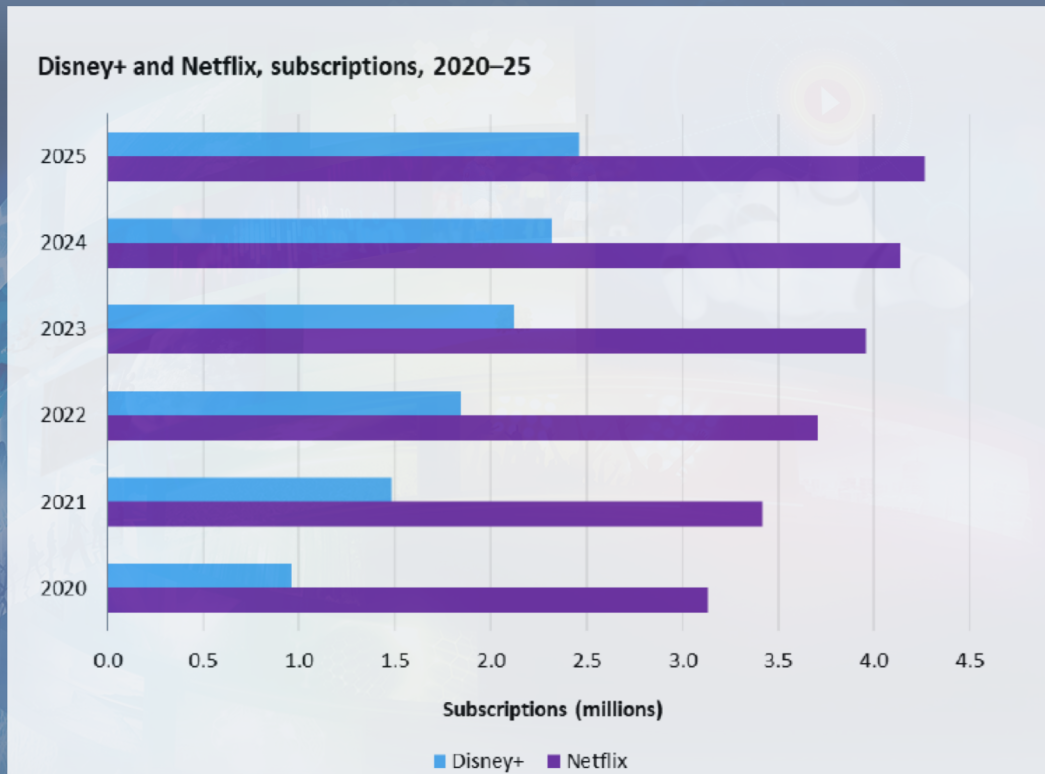
Notes: Inclusive of series renewals
Source: Omdia

© 2021 Omdia

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



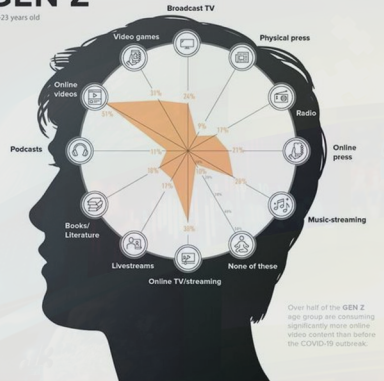
Italy Pay and OTT: Disney + steams ahead (6/6)



The Covid effect – changing generational habits?

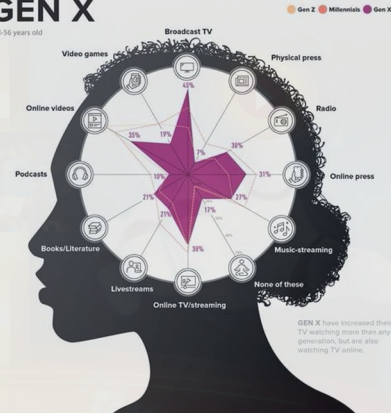
MEDIA CONSUMPTION GEN Z

16-23 years old



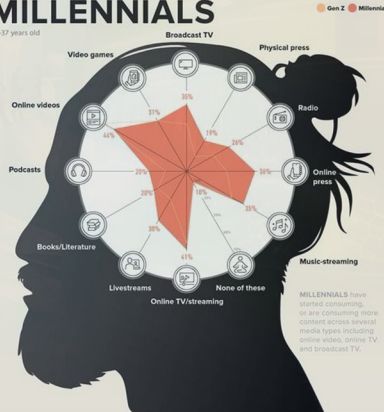
MEDIA CONSUMPTION GEN X

38-56 years old



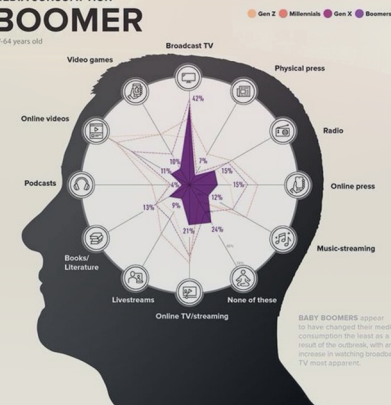
MEDIA CONSUMPTION MILLENNIALS

24-37 years old



MEDIA CONSUMPTION BOOMER

57-64 years old





THANK YOU