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Omdia: Consumer Trends

BASE & DEGI Spotlight Sessions, June 2021



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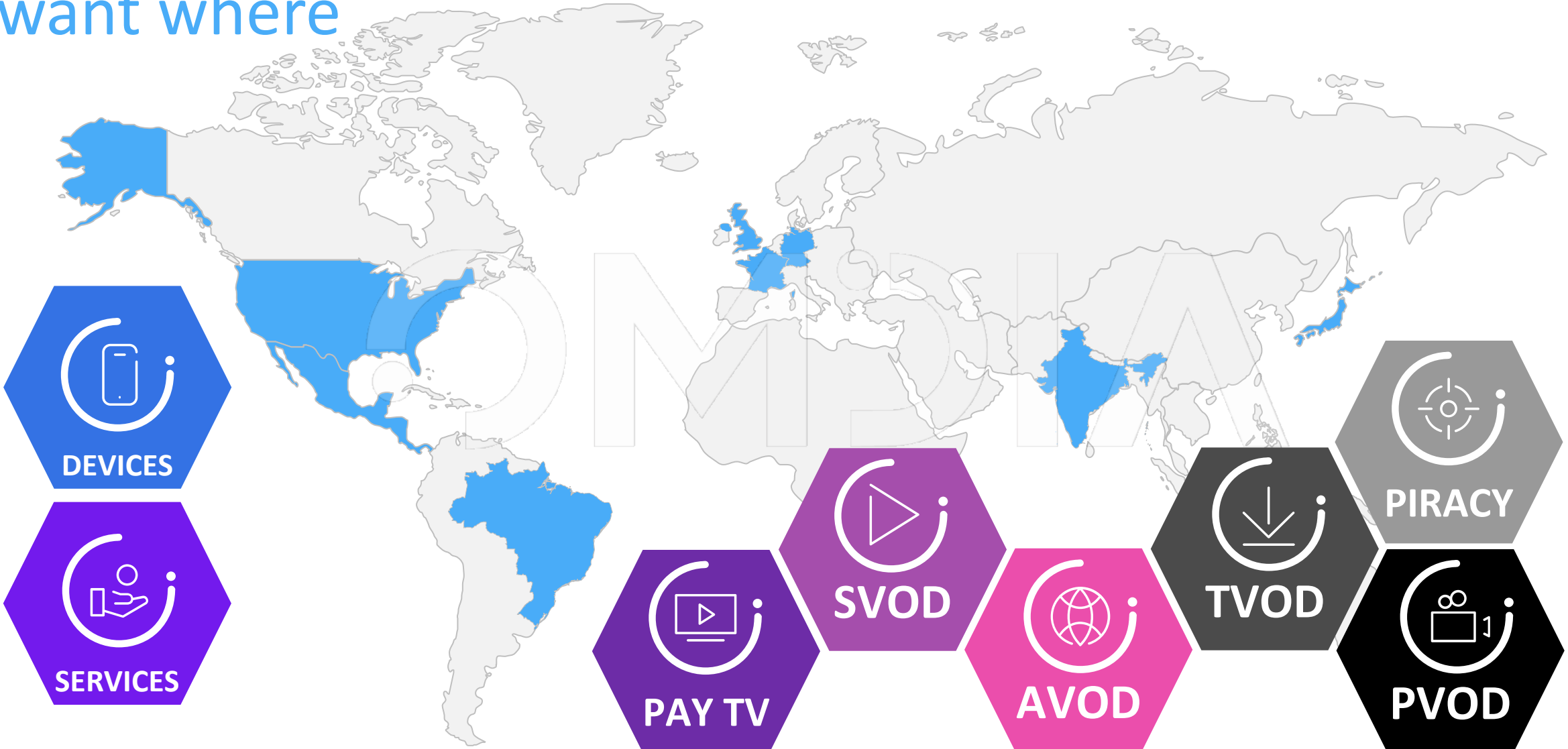
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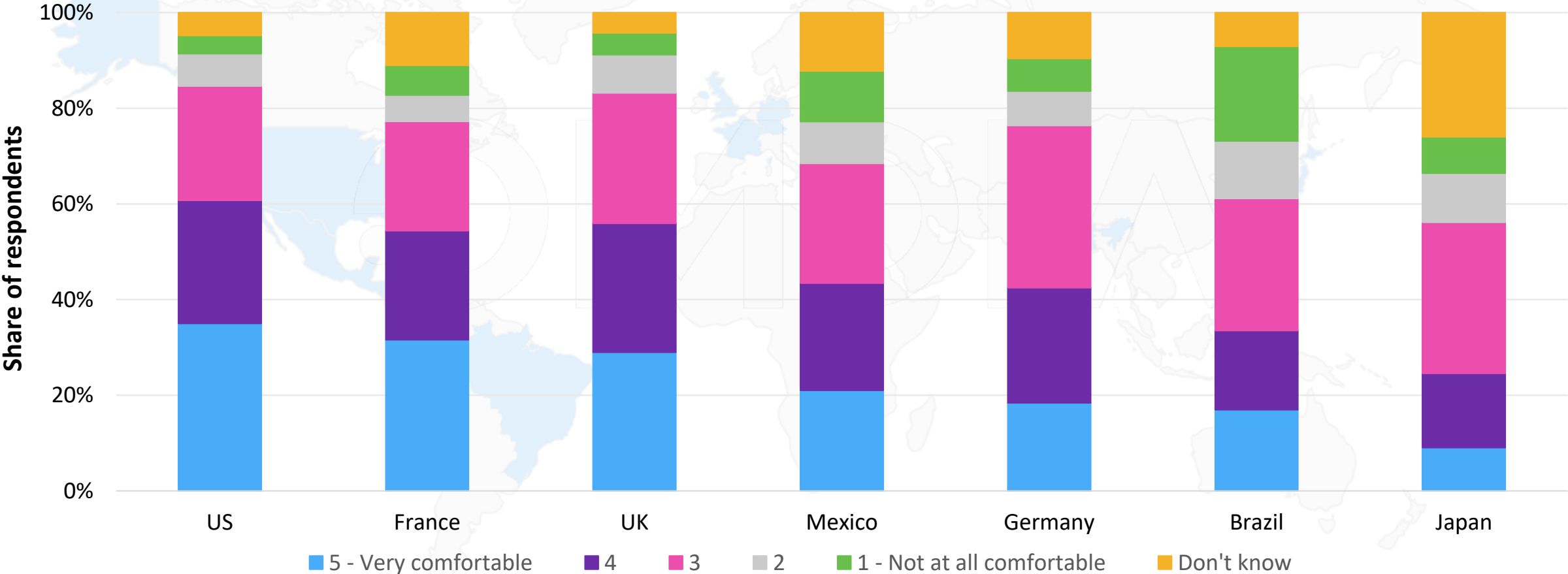
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Omdia's Consumer Survey monitors what the people want where



Despite new hopes, the pandemic rages on and consumers remain somewhat cautious

Consumer willingness to return to retail stores for entertainment and technology purchases by country, Apr 2021

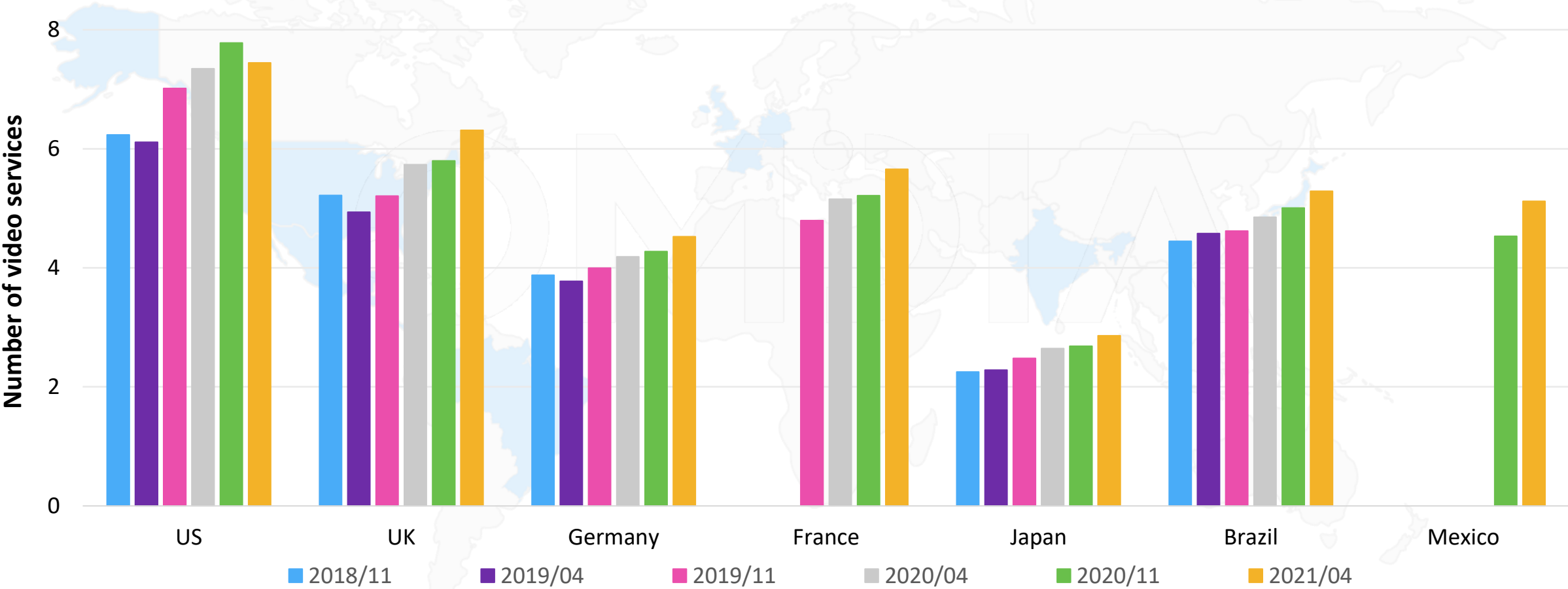


Source: Omdia Consumer Research - Devices, Media & Usage Spotlight Service

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Meanwhile, the home video self-bundling sphere continues to grow – with some new quirks...

Number of video services per video user by country, Nov 2018 – Apr 2021

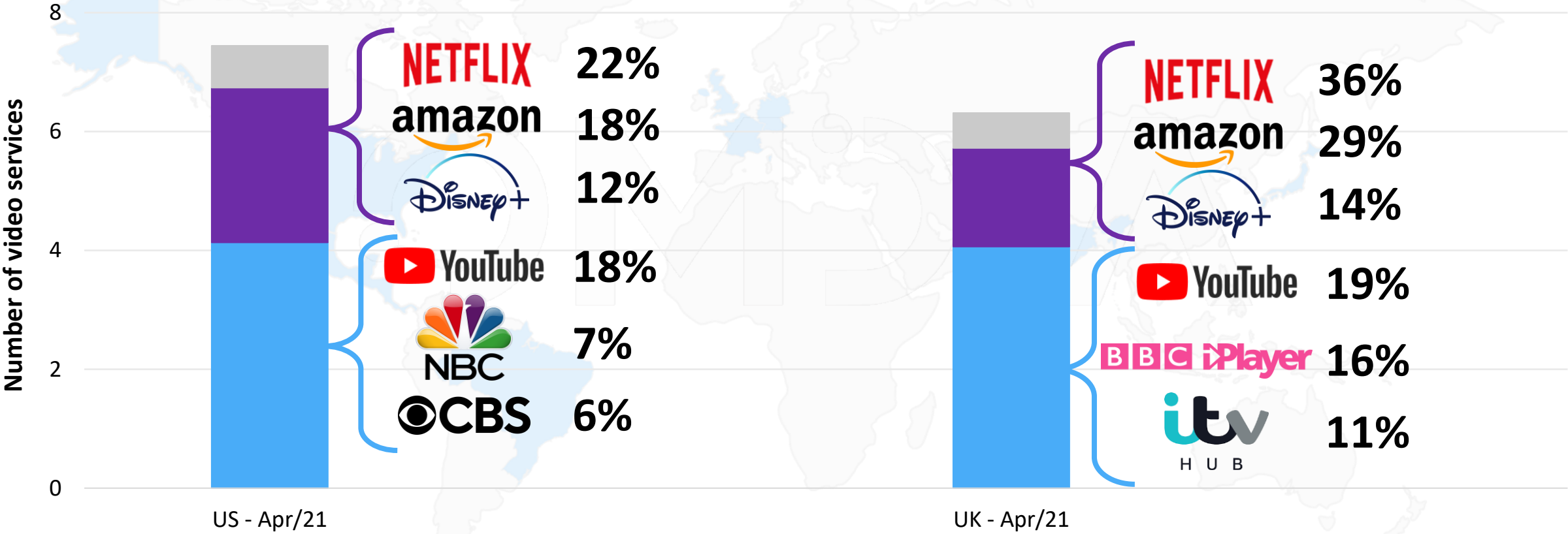


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Despite these quirks, the composition of these stacks remains relatively unchanged

Average number of video services used per video user* by country, Apr 2021

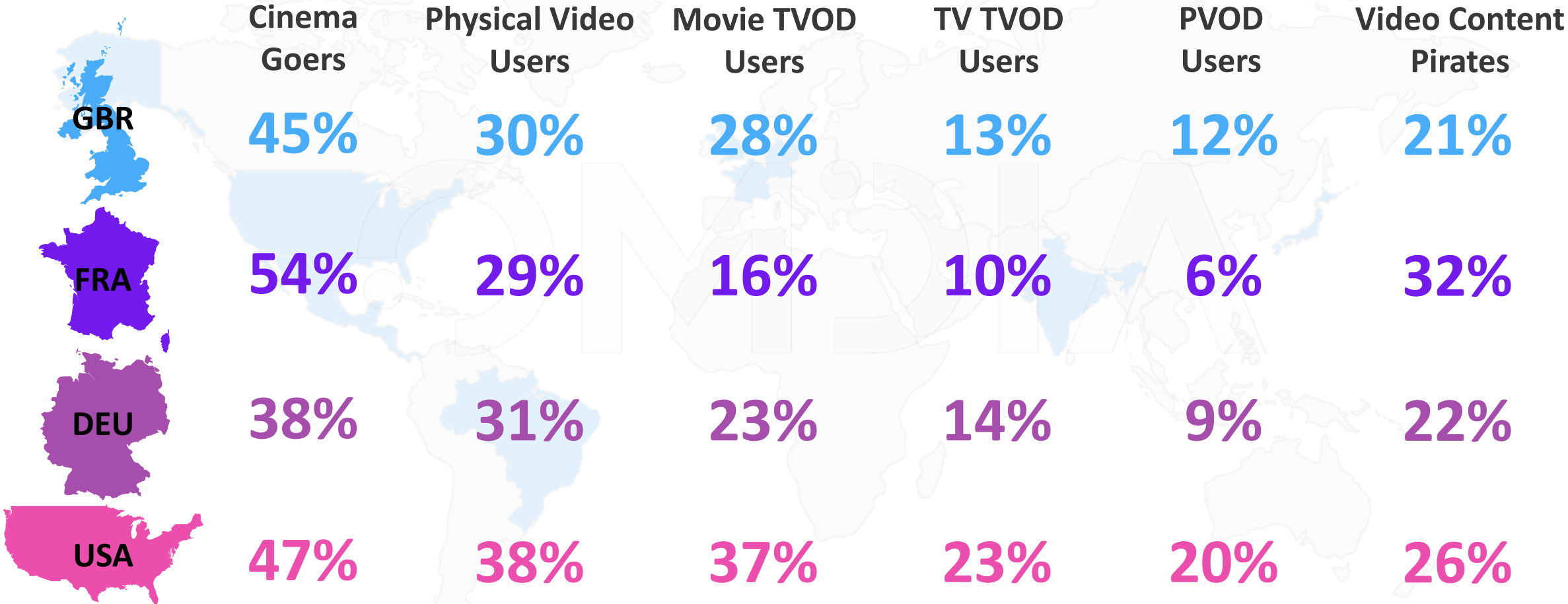


Notes: *Video User defined by Pay TV, SVOD and AVOD monthly usage. Number of services includes free and subscription video services.
 Source: Omdia Consumer Research - Devices, Media & Usage Spotlight Service

■ Pay TV ■ SVOD ■ AVOD/Free

Where does transactional video fit in?

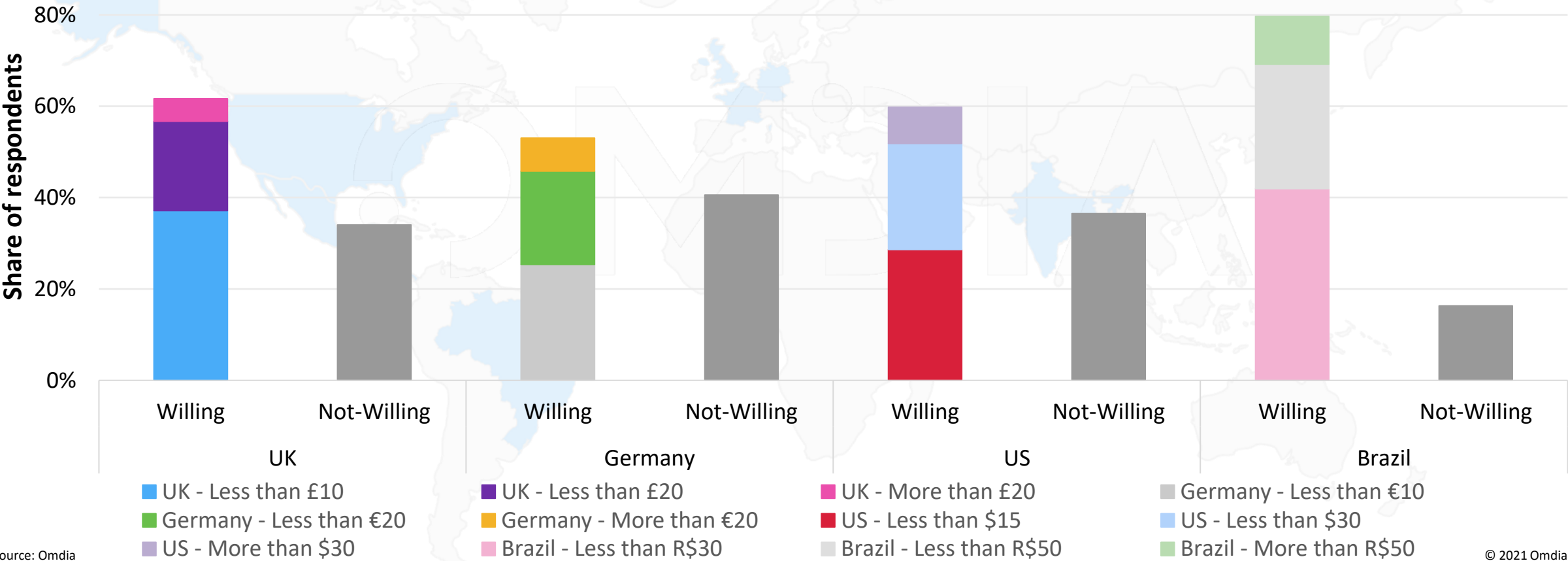
Proportion of online consumers using transactional video services by media type and country, Apr 2021



Notes: Percentage values are relative proportions of respondents in a stated market. Values are for April 2021 results. Source: Omdia Consumer Research - Devices, Media & Usage Spotlight Service

PVOD re-entered the scene in 2020 but consumer interest remains somewhat tepid

Maximum price that consumers are willing to pay for PVOD by country, Apr 2021

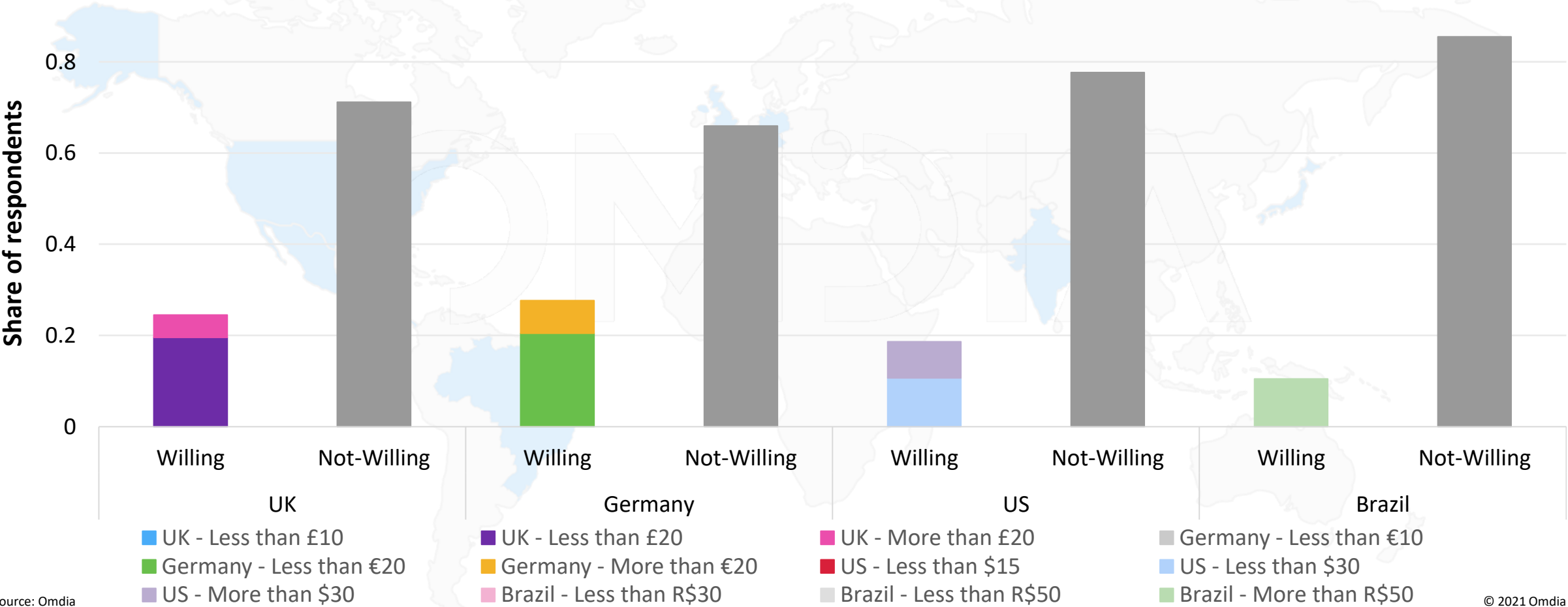


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PVOD re-entered the scene in 2020 but consumer uptake remains somewhat tepid

Maximum price that consumers are willing to pay for PVOD by country, Apr 2021

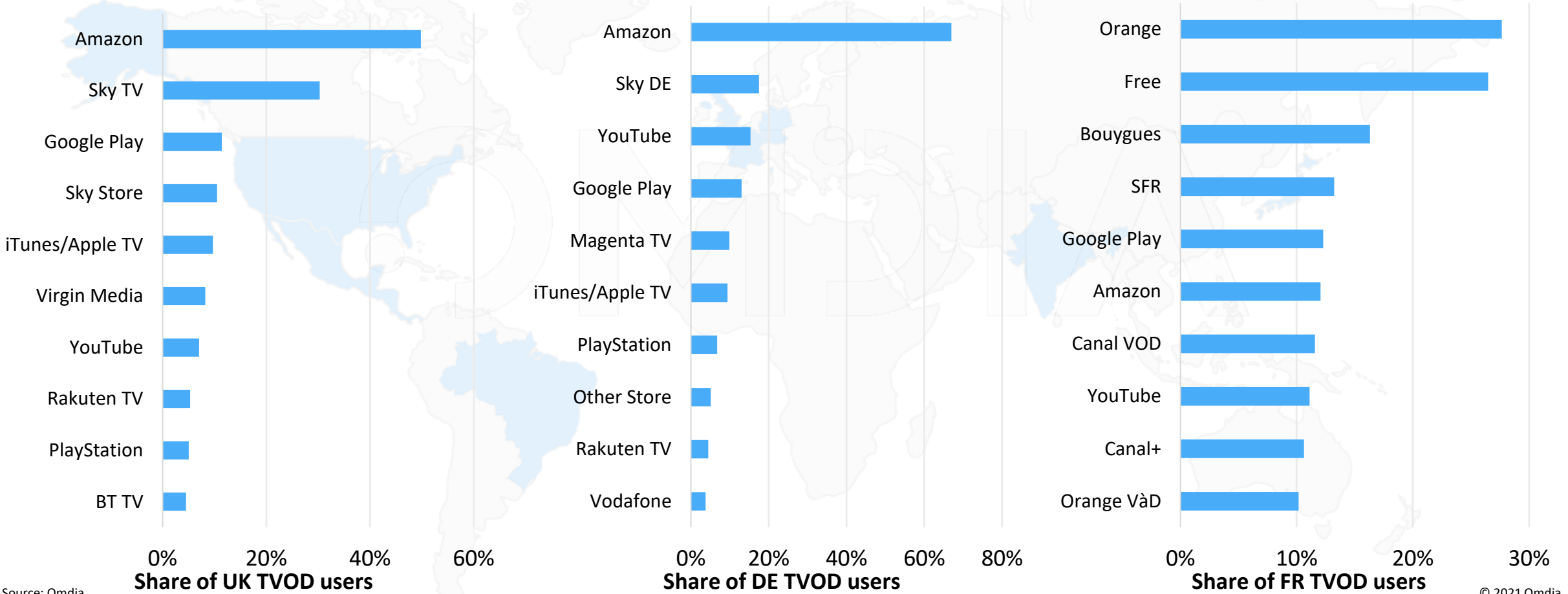


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Store rankings highlight TVOD's place as an augmentation to wider enterprises

TVOD stores ranked by share of TVOD users by operator and country, Apr 2021

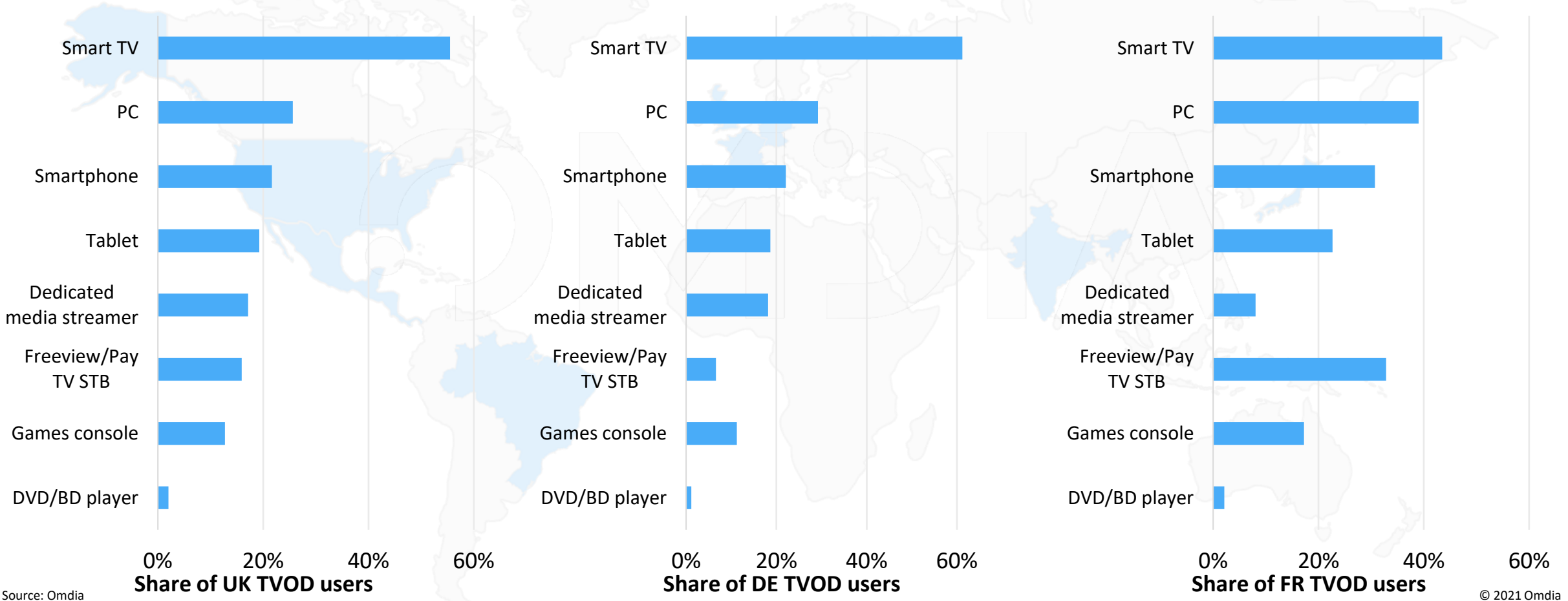


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The TV remains the content hub of the home but mobile devices also have a place for TVOD

Connected Devices used for video transactions ranked by share of TVOD users by device type and country, Apr 2021

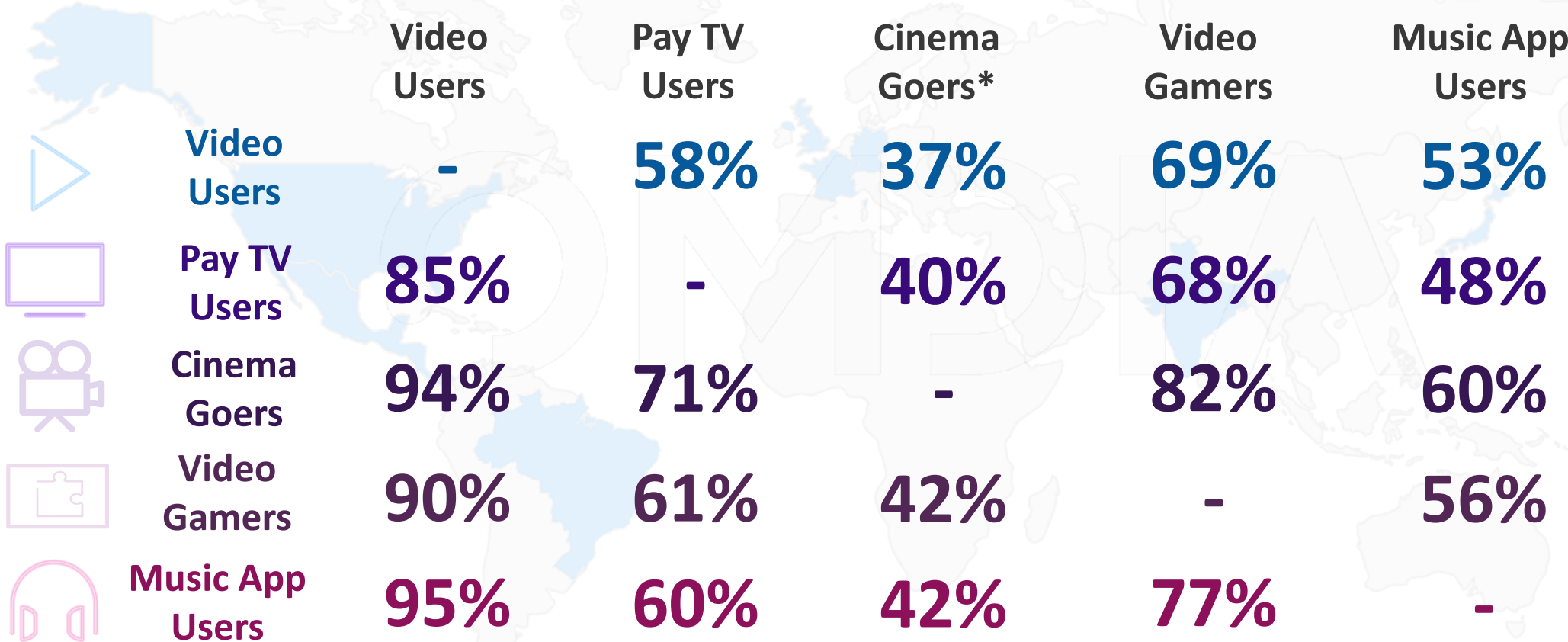


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It's increasingly important to consider the entire entertainment sphere

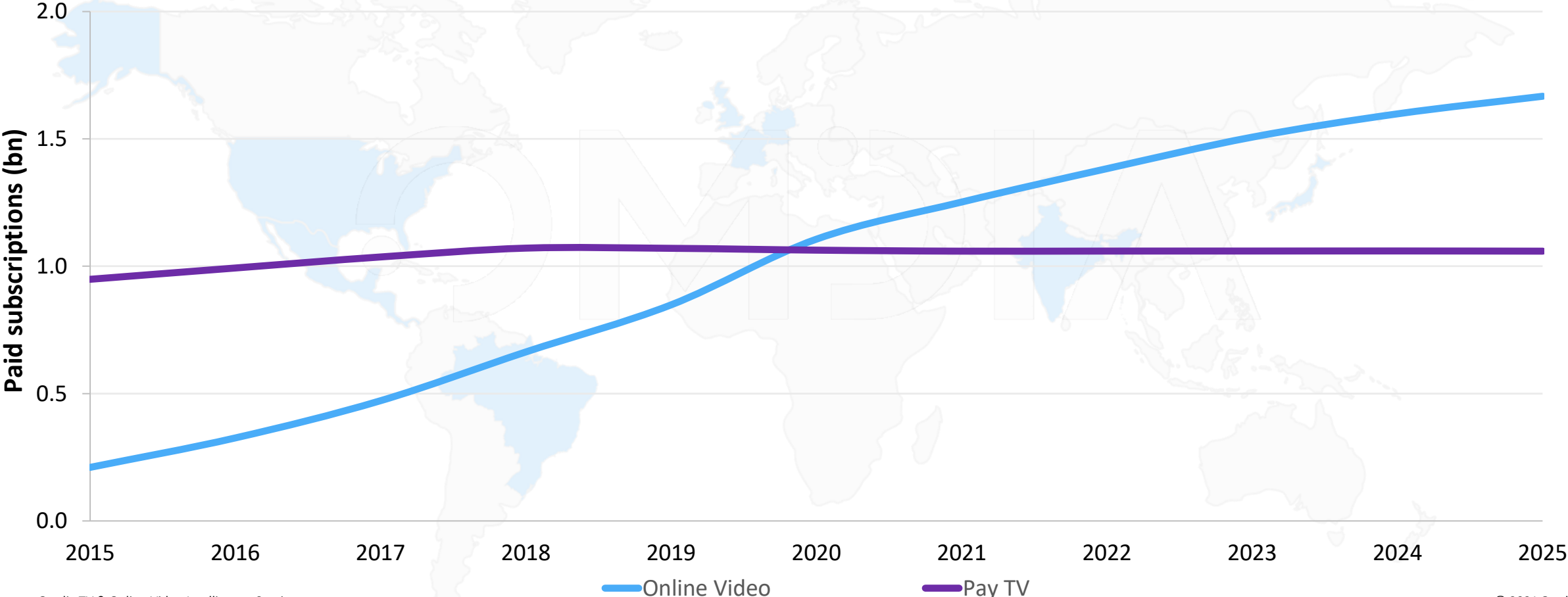
US: Proportion of OTT Video users using other services by media type, Apr 2021



Notes: Percentage values are the proportion of consumers assigned to the groups on the vertical axis that fall into the group on the horizontal axis.
 Source: Omdia Consumer Research - Devices, Media & Usage Spotlight Service

The future summarised in two lines...

Global: Pay TV and OTT video subscriptions, 2015-25



Source: Omdia TV & Online Video Intelligence Service

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Thank you!



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