2022 | ENTERTAINMENT 365

# Spotlight on Underrepresented Audiences

LUMINATE

# Contents

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## METHODOLOGY

Our Entertainment 365 study data is collected quarterly. This report's insights are from data collected from March 16th, 2022 through April 11th, 2022. Data was collected using online surveys through third-party panels that were used to collect responses. Interviews were conducted among a total of 4,004 individuals within the U.S. General Population aged 13+. The data collected is representative of the U.S. general population according to U.S. Census data, including age, gender, ethnicity, and region.

SECTION 1

# General U.S. Consumer Ages 13+

ENTERTAINMENT ACTIVITIES WITH THE MOST REACH

1 Listening to Music
Watching TV
(RANK TIED)

2 Using Social Media

3 Watching Movies

# The Biggest Reach

With so many entertainment options to choose from, the big question is: What have U.S. consumers been doing in their leisure time? **Music and television are head-to-head at a tie for 1st place** for most reach among the general population ages 13+ (Gen Pop). Behind music and television, the following players round out the top 3 entertainment activities: social media usage is in second place, followed by movies.

Music holds a special place in people's hearts — **music captures the highest rate of "die-hard" fans, especially among Gen Z with 80% of Gen Z music listeners expressing "die-hard" fanship**. Music also has the highest likelihood of non-engagers being open and willing to try the activity in the near future compared to any other entertainment type. One group that stands out in their love for music is the African American music listener who is 33% more likely to live stream music events and dedicate a greater share of their entertainment time to this activity compared to the U.S. average. This holds true despite African American consumers spending less time with entertainment overall.

**88%**

of U.S. consumers' entertainment dollars are spent on visual formats

**~33%**

Almost 1/3 of the U.S. has "cut the cord" from cable/satellite TV

# Visual Options Dominate

As for more visually engaging activities, almost **90% of dollars spent on entertainment among U.S. consumers goes toward visual formats. Television in particular owns the greatest share of dollars spent across all generations, with the exception of Gen Z.** Despite the proliferation of online video options, the majority of consumers are still paying and using cable/satellite TV packages — the highest rates being among Boomers and Silent Gen. **On average, almost ⅓ are "cord cutters," with Gen Xers having the highest cord cutting rate.** It's noteworthy that, despite the reach of television and the abundance of TV/movie streaming platforms available, **Hispanics, Native Americans, and Asian/Asian Americans are among the top racial/ethnic groups who enjoy movie theater experiences.**

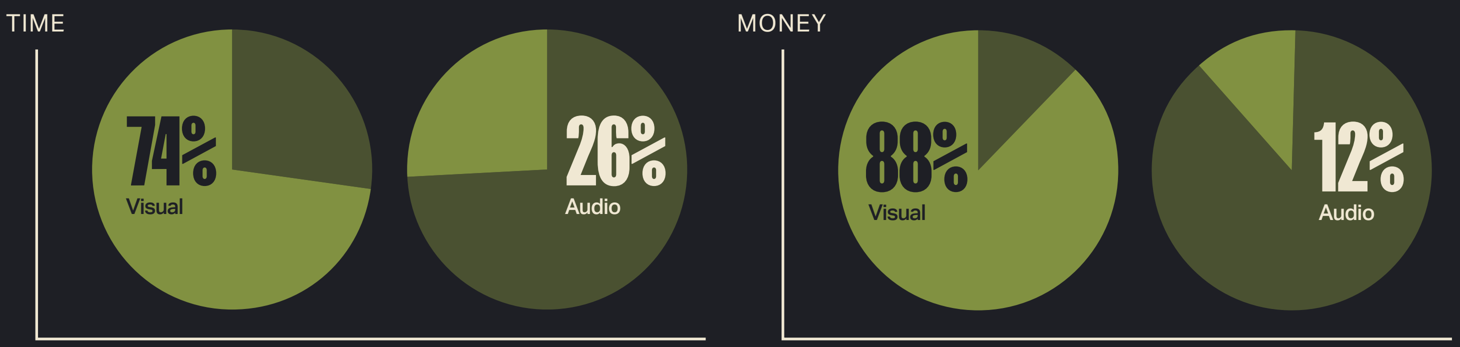
# #1 Social Media is the top discovery source of entertainment

## Discovery Is Highly Social

Now how do these groups find out about new content within their respective entertainment interests? Well, consumers are particularly drawn to social media as a way to connect with others and find new entertainment suggestions. Especially as people have turned to social sites to stay connected and entertained during the pandemic, socials have become a multi-purpose touchpoint. In fact, **social media is now the #1 discovery source for all things entertainment, which is quite clear for Women, Asian/Asian Americans, and members of the LGBTQ+ community in particular**. This has helped emerging artists like Doja Cat rise to fame via social platforms like TikTok.

Speaking of discovery, artists are also being discovered through having their work featured in popular video game titles. In fact, Gen Z gamers are helping power this trend as they are 118% more likely than average to discover new content through video games. This comes at no surprise as **Gen Z invests the greatest share of their dollars on video gaming and has the highest rate of console usage** compared to all other generations, despite their lower annual income. But not all gamers are the same as the age-old battle of which video game platform is best continues. **While men tend to dominate PC and console platforms, female gamers are opting for more portable options, with 82% of them identifying as mobile gamers (e.g., using phones, tablets, etc.).**

## TIME SPENT VS. MONEY SPENT ON ENTERTAINMENT




**~60%** Share of entertainment time consumers spend on platforms with advertisements

50% or more of Gen Z and Millennials familiar with NFTs, cryptocurrency, and/or music royalties are planning to invest in them in the next 3 months

# Follow the Money

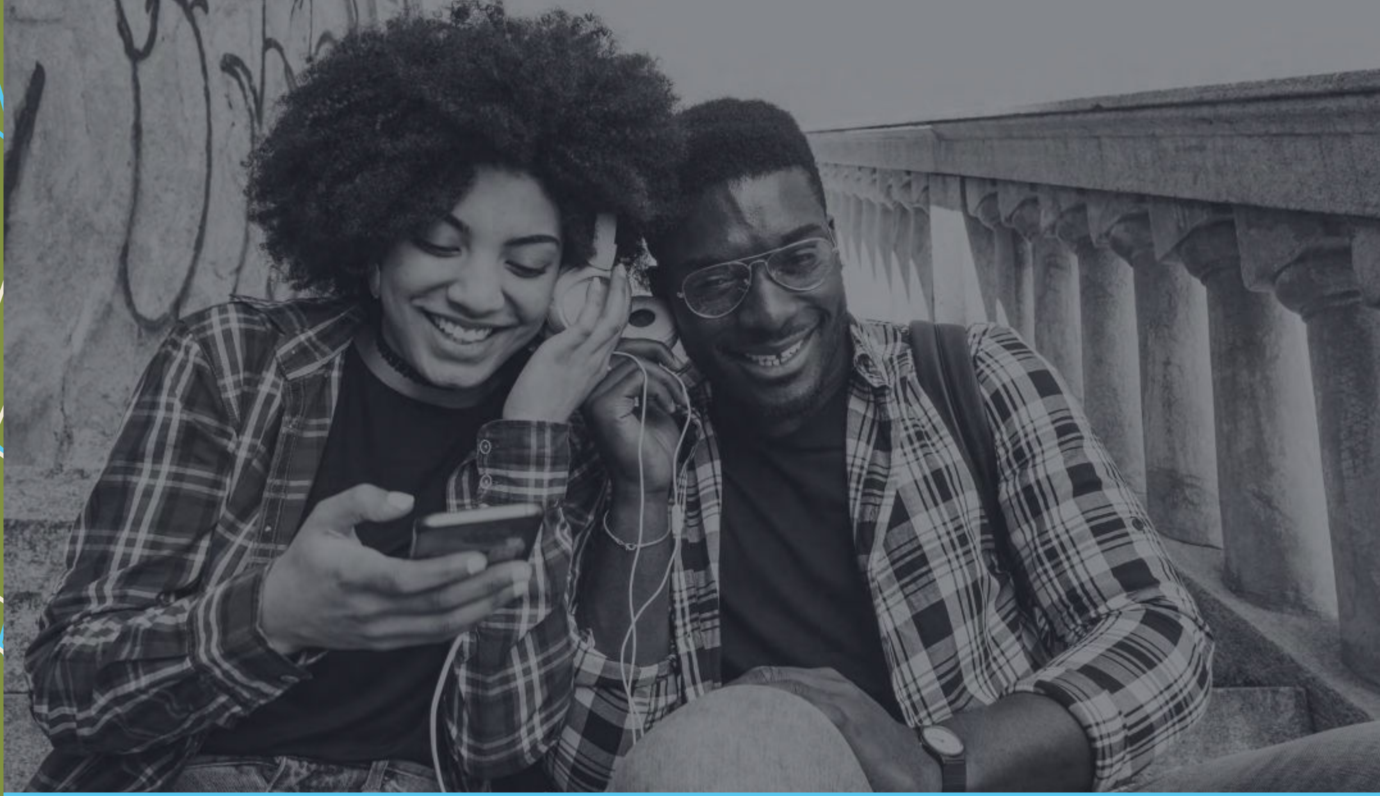
If we consider money spent as an indicator of entertainment enthusiasm, certain entertainment engagers stand out in their broad engagement. Compared to the average U.S. consumer, the following types of fans spend more on entertainment: eSports fans (97% more), virtual reality engagers (87% more), music live streamers (81% more), and podcast live streamers (61% more). These audiences are entertainment buffs who are willing to spend across multiple entertainment areas.

**Looking at total entertainment time, consumers spend 74% on visual and 26% on audio options.** In addition, **consumers spend almost 60% of their entertainment time on platforms with advertisements** — this is especially true for Gen Z with rates declining with each generation. However, ads seem to be part of the deal as almost **50% of consumers are satisfied with the amount of ads they are exposed to**. In fact, having an ad-free experience isn't the main driver for premium subscriptions. Getting a good value for the price and having a variety of content to consume are the top two deciding factors for premium subscriptions.

Taking a look ahead at some potential future trends, Gen Z and Millennials are at the forefront. **While currently less than ⅓ of consumers are familiar with NFTs, Gen Z are 34% more likely to be familiar — the highest among any generation**. The highest engagement rates are among Millennials who are 63% more likely to own and be actively investing in NFTs. The story is quite similar when it comes to the Metaverse as well. Among those who are familiar with the concepts, **at least 50% or more of Gen Z and Millennials are interested in investing/spending money on NFTs, cryptocurrency, and/or music royalty investing** in the next 3 months.

SECTION 2

# Black/ African American



+17%

More likely to choose entertainment options that help them connect to their culture, identity, and values

## Strategic Engagers

Black/African American entertainment consumers tend to be more selective and strategically choose a few entertainment areas to invest in. In total, this audience spends 5% less time and 12% less money on entertainment compared to average. However, this group gravitates specifically toward engaging with live streamed entertainment offerings — taking the form of music events and podcasts/talk shows. These entertainment outlets offer ample content that resonates with this audience, who are **17% more likely to choose options that help them connect to their culture, identity, and values**.

TOP 3 PODCAST GENRES

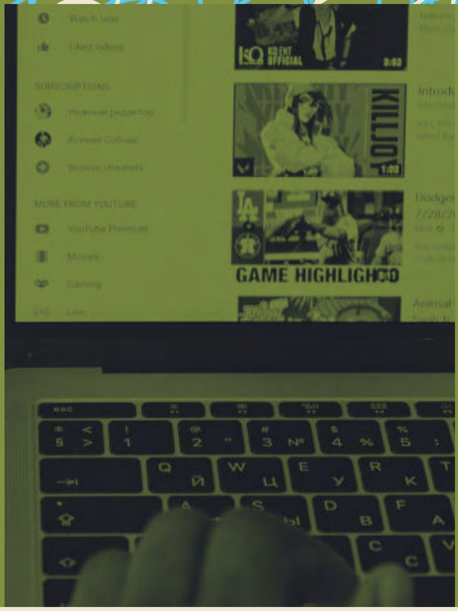
1 Entertainment (Film, TV, Celebrity)

2 Comedy

3 Health/Fitness

~10%

More likely to live stream podcasts/talk shows



#1

YouTube Live is the top platform for live streaming podcasts/talk shows

# Podcast/Talk Show Buffs

The Black/African American audience is almost **10% more likely to live stream podcasts/talk shows, investing a significantly greater share of entertainment time into this activity** compared to the average U.S. consumer. Among those who haven't tried this activity, non-engagers have the highest willingness rate compared to all other races/ethnicities, expressing that they are "very open" to this activity in the future. Among Black/African American live-stream podcast/talk show listeners, **the top three genres are entertainment (film, TV, celebrity), comedy, and health/fitness** — this audience is around 20% more likely to listen to entertainment and health/fitness content than average. When it comes to platforms of choice, over half of Black/African American listeners go for YouTube Live, and they are 21% more likely to use Instagram Live compared to average live streamed podcasts listeners.

# +17% More likely to live stream music events

**TOP MUSIC GENRES**

- R&B
- Hip-Hop/Rap
- Oldies
- Christian/Gospel
- Jazz

# Live Streamed Music is a Must

Black/African American consumers are also **17% more likely to live stream music events, as well as dedicate more time and a greater share of their entertainment time to this activity** (despite more limited time with entertainment in total). Contributing to their live streaming behaviors, this consumer group has a lower comfort score with going out to large social events due to the pandemic. Thus, live streamed music events offer an ideal outlet for their passion for music. This audience's music tastes are varied. **Some of their top music genres include R&B, Hip-Hop/Rap, Oldies, Gospel, and Jazz**. Compared to the average music listener, they are significantly more likely to listen to Afropop (129% more likely), R&B (102% more likely), and Hip-Hop/Rap (70% more likely). Similar to podcast consumers, African American music listeners tend to use multipurpose platforms that offer a variety of relevant content, such as **YouTube, Spotify, and Amazon Music**.

Considering their live streaming passion points, this audience leans on their **smartphones as the go-to device for entertainment**. Screentime is the norm and a key source of entertainment — the Black/African American consumer is 25% less likely to agree that people spend too much time today staring at their phones and other screens. In fact, they utilize functionalities that give them new content at their fingertips — for example, they are **14% more likely to discover new entertainment content through emails/alerts**. Once they get their hands on new content, they are eager to share with friends — being **19% more likely to be thought of as trendsetters within their social circles**.

SECTION 3

# Hispanic

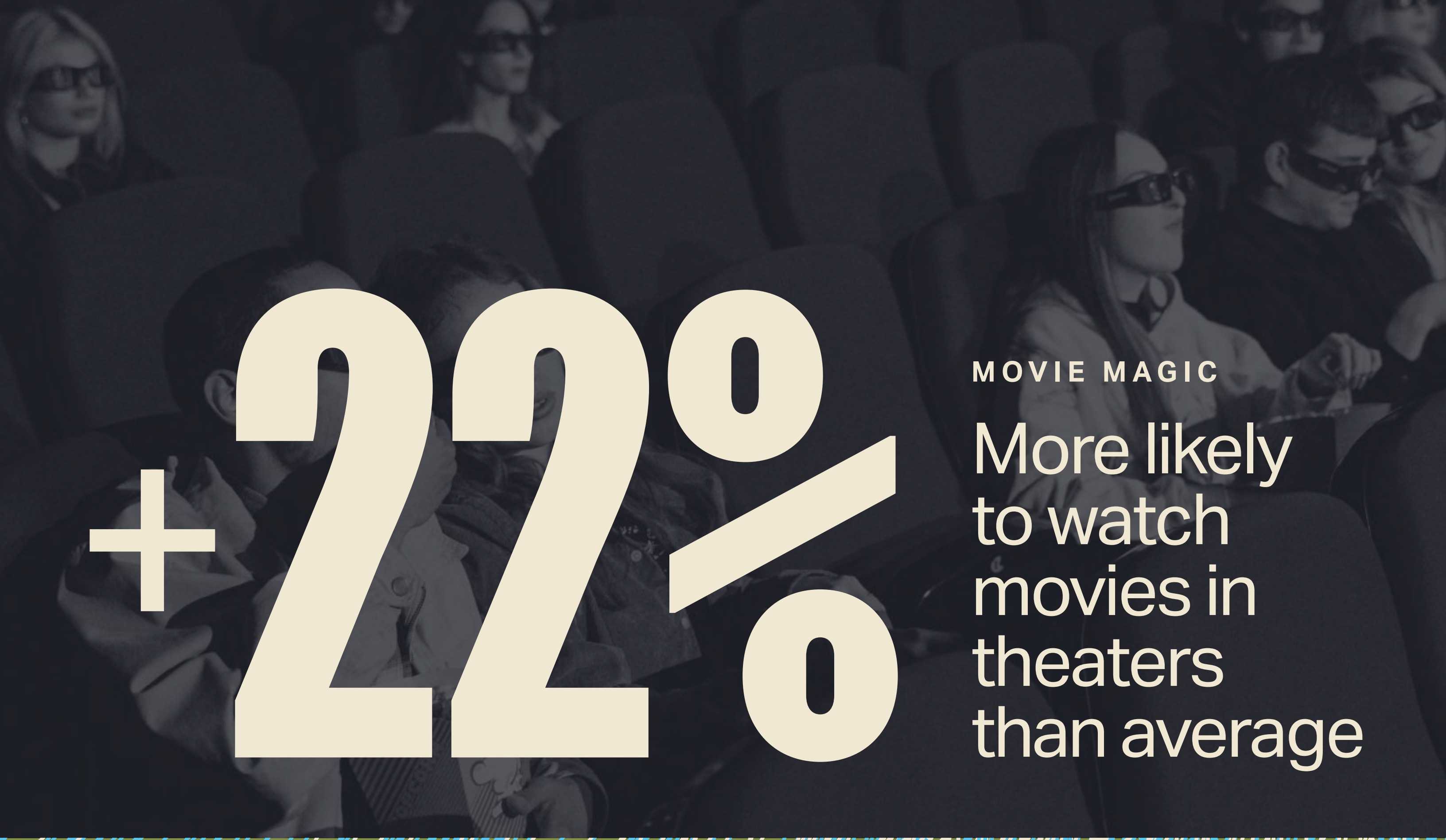

**~10%** More money spent on entertainment than the average consumer

**+31%** Entertainment dollar share spent by Hispanic movie watchers on in-home and theater-based movie experiences

**46%** of Hispanics identify as the most "Die-hard" TV Fans

# Top Entertainment

Hispanic viewers are committed to their movie and TV watching experiences. Hispanics **overall spend almost 10% more money on entertainment** than the average consumer, with Hispanic movie watchers spending a **31% greater share of money on watching movies compared to the average U.S. consumer**. Of this group, almost half of them identify as the most "die-hard" TV show and film enthusiasts. These consumers often discover new entertainment content through their TV and movie consumption. Whether in the comfort of their own home or immersed in a 3D, IMAX theater experience, this group takes their entertainment seriously.



# +22%

MOVIE MAGIC

More likely to watch movies in theaters than average

## TOP 5 FAVORITE MOVIE GENRES SEEN IN THEATERS

- Action/Adventure
- Comedy
- Drama
- Superheroes
- Horror

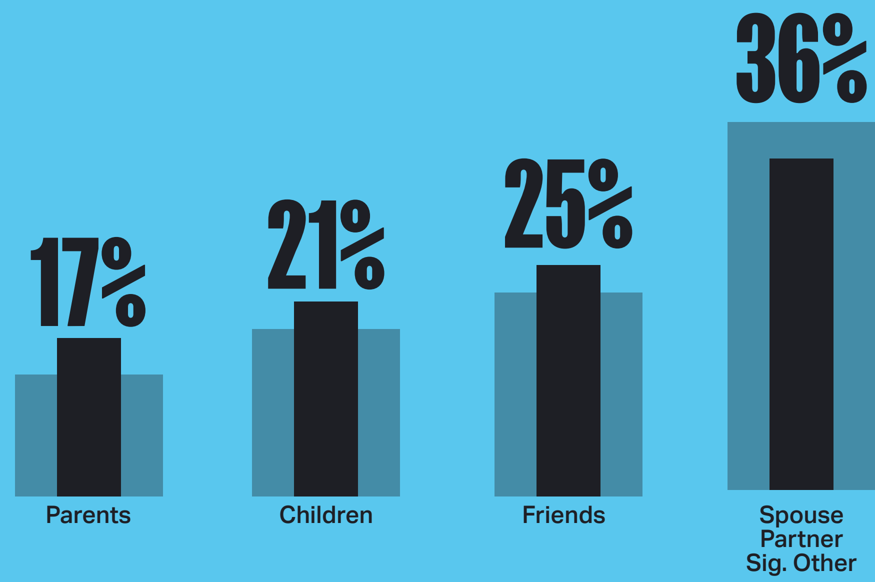
# It’s Movie Time

Nearly half of Hispanic movie viewers enjoy taking a trip to the cinema, making this group **22% more likely to watch movies in theaters** than the average film viewer. In fact, they have seen 20% more films in theaters on average in the past 3 months, with **top genres seen in theaters including action/adventure, comedy, drama, superheroes, and horror**. Their love for films has also encouraged this dedicated group to spend 14 more hours watching movies in a typical month, compared to the average U.S. consumer.

SHARE THE LOVE

## Hispanic Consumers Enjoy Entertainment Activities with Loved Ones

Hispanic Consumers
Average U.S. Consumer





**1/3** of Hispanic TV consumers have watched superhero and/or family-oriented TV series in the past 3 months

# Movie Time Is Family Time

The Hispanic population shares the love when it comes to movies and entertainment in general. They are **28% more likely than the average U.S. consumer to engage in entertainment with their parents, followed by children and friends at 15% increased likelihood**. Consequently, they are 17% more likely to watch animated and cartoon films, followed by children & family-oriented movies at 11%. Beyond movies, **a third of Hispanics TV consumers have watched TV series featuring superheroes and/or family-friendly content**. It stands to reason then that this community gravitates towards platforms that provide entertainment options for the whole family; for instance they are **28% more likely to subscribe to Disney+**.

As more and more films that provide nuanced representations of Hispanic cultures are released, sharing those viewing experiences with family members of all ages becomes all the more meaningful. This is especially true given that the Hispanic population is **24% more likely than average to engage with entertainment when it helps them connect with their culture and identity**. Culturally appropriate movies like Disney's *Encanto* and *Coco* not only provide representation of hispanic culture(s) in film, but they also tackle difficult topics such as intergenerational trauma and cultural history in a way that is palatable to viewers young and old. Representation matters, not only in the appearance of the characters, but also when it comes to the portrayal of common experiences that are faced by immigrant families.


GOING ALL IN

**88%**

of Hispanics have at least one paid SVOD subscription

**+15%**

More likely to upgrade to a paid sub service in the future

### Top 3 SVOD Platforms

- PEACOCK
- HULU
- HBO MAX

### Top 3 Podcast Platforms

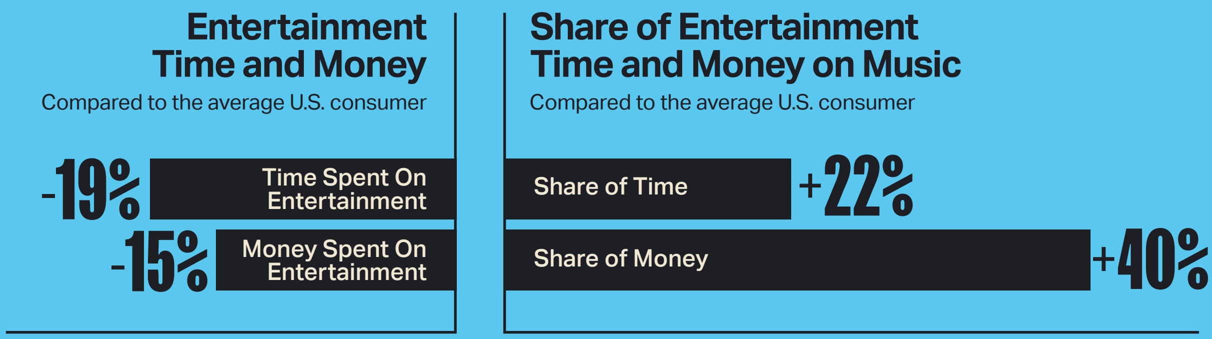
- SPOTIFY
- AMAZON MUSIC
- IHEART RADIO

# Subs Power In-Home Theater

This group finds it important to streamline their viewing experiences. Although the movie theater experience is hard to replicate, creating the ideal movie experience at home has led Hispanics to be **23% more likely to own a home theater system and 13% more likely to use voice activated remotes**. Inspired by their love for theater-going, Hispanics also make it a point to minimize interruptions. Hispanics go all-in when it comes to paying for entertainment subscriptions. They are the **most likely to have paid subscriptions for entertainment services compared to all other racial/ethnic groups**. This holds true across various forms of entertainment. For SVOD services in particular (e.g., Netflix and Hulu), they are 13% more likely to have the paid, ad-free version of the subscription. Of those who do not currently have a paid subscription to entertainment services, they are **15% more likely than average to say they would upgrade to a paid subscription service in the future**.

SECTION 4

# Asian/ Asian American




# Music as a Mood Booster

Despite spending less time and money on entertainment, the Asian/Asian American consumer is plugged in and socially connected, investing their time and money into entertainment forms that they really care about — with music, social media, and sports/exercise standing out.

Although this audience spends 19% less time and 15% less dollars on entertainment than the average U.S. consumer, they dedicate considerable resources to music. Compared to the general population, the **share of time spent with music is 22% greater and the share of money spent on music is 40% greater**. Music is an important aspect of everyday life as nearly 80% of Asian/Asian Americans engage with music on a regular basis. And why not? Considering the uplifting benefit music can provide, it makes sense that Asian/Asian Americans are **21% more likely to choose entertainment options that make them feel good**.

ECLECTIC MUSIC TASTES

### Top Music Genres

- Pop/ Top 40
- R&B
- Hip-Hop/ Rap
- K-Pop
- EDM
- Bollywood

# Global Music Tastes

When it comes to music selections, Asian/Asian American music listeners are global in their music tastes. While some of their **top genres include Pop/ Top 40, R&B, and Hip-Hop/Rap**, they are much more likely to **supplement their listening with K-Pop, EDM, Bollywood, and even Broadway**. Their enjoyment for the Broadway genre is in line with their predilection for arts and culture — this group is **56% more likely than average to visit museums and other cultural institutions** for leisure. Additionally, of those who do not currently live stream or attend live, in-person music events, about 52% of respondents are open to doing such activities in the near future.

Drawn to visual aspects of music, Asian/Asian American music listeners are **24% more likely to watch music videos** than the average U.S. music listener. Though a large majority are using music streaming services online, they are opting to invest their money on tech rather than subscriptions. Asian/ Asian Americans are **11% more likely to agree that they are willing to pay more for top quality entertainment technology**, but at the same time music listeners within this group are **15% more likely to be using free music streaming options**. It's worth noting, however, that it seems to be tougher to make an impact on this audience via ads. Among those who use free entertainment services, Asian/ Asian Americans are **23% *less* likely to purchase the product or service being advertised after hearing/ seeing an ad** than the average free service user.



BTS: THEO WARGO/GETTY IMAGES

INVEST IN THE BEST

**+11%** More likely to be willing to pay more for top quality entertainment technology

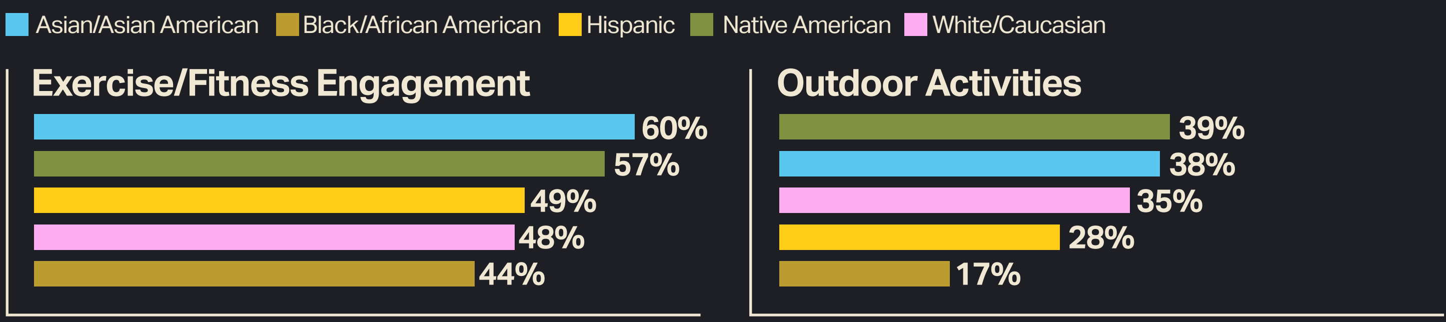
**They are more likely to use:**

**+39%** Smart watches

**+35%** Specialized headphones

**+18%** Smart displays/ speakers

ON-THE-GO LIFESTYLE




# Social and Active

Social connections are a powerful force for Asian/Asian Americans' entertainment choices. Over **70% of all Asian/Asian Americans use social media**, with the most popular platforms being **Facebook, Instagram, and Twitter, followed by TikTok**. In fact, social media is the top outlet for these consumers to discover new entertainment content; they are **38% more likely to discover content through social media influencers** compared to average entertainment consumers. This audience makes a point to stay connected with their friends who play an integral role in their entertainment choices. Asian/Asian Americans are **26% more likely to enjoy asking for entertainment recommendations from family and friends** and, among parents, **they are 31% more likely to agree that their children influence their entertainment preferences**. Being social is a large part of this audience's entertainment experience.

Asian/Asian American consumers also tend to gravitate toward sporty, active ways of spending their leisure time. **At 60% engagement they are the highest group to engage in fitness/exercise** compared to other races/ethnicities. They also enjoy outdoor activities like hiking, camping, fishing, etc. While outdoors and on-the-go, they make sure to bring their tech along for the ride. Driven by their active lifestyles, Asian/Asian Americans are also **11% more likely to use smartphones, 35% more likely to use premium specialized headsets, and 39% more likely to use smart watches for entertainment. Alongside this, they are 18% more likely to use smart speakers, even when not out-and-about**.

SECTION 5

# Native American

EXPERIENCE MATTERS

**+35%**

More likely to agree that they prioritize spending money on experiences rather than buying material things

# All About the Experience

Native Americans tend to **prioritize experiences over content**, and are 28% more likely to agree that they'd rather spend leisure time with family/friends over screen-time. They also choose to allocate their resources accordingly — they are **35% more likely to agree that they prioritize spending money on experiences rather than buying material things**. Their priorities are evident in their interests in live events, sports, theater-going, fitness, and others.

~70%

GET THE POPCORN

Almost 70% of Native Americans watch movies

+25%

More likely to go to movie theaters

1/3

Of Native American consumers have "cut the cord" to their TV subs

+50%

More likely to watch animated, independent & horror film genres

# Movie Fans

Highlighting their enjoyment of the movie experiences, **almost 70% of Native Americans watched movies in the past 3 months**, making them the group that is most likely to engage with this activity. Among those who aren't already watching movies, they are 22% more likely to be open to watching movies in the future — the highest rate across races/ethnicities. The film viewing experience is essential as **over 40% of Native American movie watchers have gone to the theater in the past 3 months**. Compared to the average movie watcher, this audience is at least 50% more likely to enjoy **animated/cartoons, independent, and horror genres**. Plus, they are less likely to watch movies via cable/satellite provider with **⅓ of Native American consumers having already "cut the cord" when it comes to their TV subscriptions**.

## BREAKING A SWEAT

**+40%**
More likely to play sports

**+26%**
More likely to engage in outdoor activities (e.g. hiking, camping)

**+18%**
More likely to engage in exercise/fitness

**~1/3**
Consume entertainment while exercising

**Native sports engagers are at least 30% more likely to watch the FIFA World Cup, Major League Soccer, Spanish La Liga Santander & German Bundesliga**

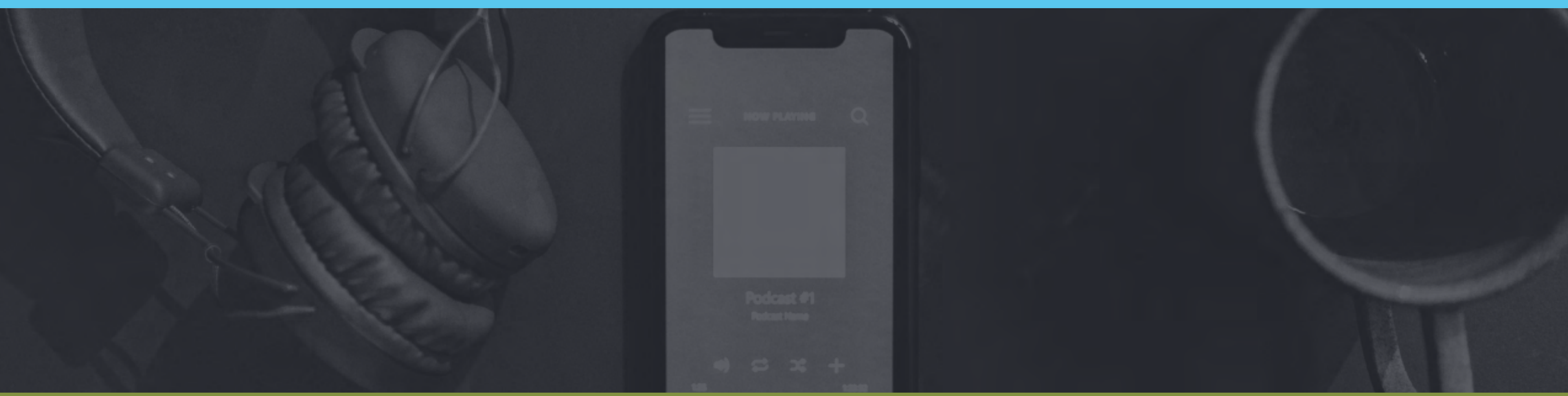
# Staying Active

Sports and fitness are also a passion point for this audience. Compared to the U.S. Gen Pop, they are **40% more likely to play sports, 26% more for participating in outdoor activities (e.g., hiking, camping), and 18% more for engaging in exercise and fitness**. More than any other group, almost ⅓ of Native American entertainment engagers tune into entertainment while they are exercising. Their enthusiasm for sports translates into team engagement as well. **With more than ⅓ watching, attending, or listening to sports games, Native Americans are 10% more likely to consider themselves "die-hard" fans of sports content compared to the average U.S. consumer**. Sports enthusiasts are **at least 30% more likely to watch the FIFA World Cup, Major League Soccer (MLS), Spanish La Liga Santander and German Bundesliga** compared to the average U.S. sports engager. When catching games, these sports fans are 100% more likely to exclusively use free sports streaming services. In fact, almost all Native American consumers use some type of a free entertainment streaming app (e.g. film, music, podcasts, etc.).

**+56%** More likely to choose music genre podcasts

**+32%** More likely to attend live music events

**+31%** More likely to live stream music events



**+67%** More likely to watch re-broadcasted previously held live music events

# Live Music

Music is another touchpoint, offering this audience ample opportunity for live experiences. Native Americans are **32% more likely to attend live, in-person music events and 31% more likely to live stream music events.** Compared to the average Gen Pop, they are **especially likely to go to concerts and music festivals during their free time**. In fact, their love of music is apparent in that Native music listeners are **67% more likely to watch re-broadcasted concerts, festivals, and previously held live music events** compared to the average music listener. Their passion for music even bleeds over into their podcast preferences, with Native American podcast listeners being 56% more likely to choose music podcast genre compared to the average podcast listener.

SECTION 6

# LGBTQ+

**Compared to the Average U.S. Consumer, They Are:**

**+30%**
More likely to multitask during entertainment activities

**+26%**
More likely to use turntables, record, and vinyl players

**+25%**
More likely to be considered a trendsetter by their friends

# Busy Bees & Setting Trends

Standing out from the crowd is something that the LGBTQ+ population does best. LGBTQ+ U.S. consumers (ages 18+) are **25% more likely than average to say that their friends think of them as a trendsetter** and are 15% more likely to indicate that their entertainment choices make them a more interesting person. As a matter of fact, LGBTQ+ consumers seem to be **keeping the use of turntables, record, and vinyl players alive as they are 26% more likely than average to use these devices**. Trendsetting is hard work for these busy bees, so how do they manage it all? Even despite their busy lifestyles, they still find time for leisure. Compared to the average entertainment consumer, they are **30% more likely to multitask while engaging with entertainment** and are 33% more likely to consume such entertainment while at school, followed by work at 14% increased likelihood. Like many, they are also active on social media, with over half of respondents naming social media as one of their discovery sources for new content.

Read/listened to an average of **6 books/ audiobooks** in the past 3 months & listened to **19% more audiobooks** than the average audiobook listener

**Top 3 Book Genres**

- Action & Adventure
- Crime/Detective Novels
- Drama

# Bookworms

While social media helps them stay connected and up-to-date with their favorite influencers and celebrities, this group also enjoys slowing things down by engaging with books, audiobooks, and podcasts. LGBTQ+ readers indicated that they had **read an average of 6 books in the past 3 months**. Complimenting this, physical and digital book consumption seem to be tied as LGBTQ+ audiobook listeners also **listened to an average of 6 audiobooks in the past 3 months, listening to 19% more audiobooks compared to the average audiobook listener**. Of those who are not typically consumers of physical and digital book formats, almost 60% of the sample said they were open to engaging with these types of entertainment. **Top book genres among this group include action & adventure, crime/detective novels, and dramas**. They also have an eclectic sense of taste with increased likelihoods of reading folklore/mythology, poetry, and graphic novels. Their interest in reading has also influenced their live event attendance, such that **LGBTQ+ individuals are 45% more likely to attend book reading and signing events than the average U.S. consumer**.

LEARNING THROUGH LISTENING

**Spend a greater share of money on:**

**+49%** Live Streaming Podcasts

**+34%** Pre-Recorded Podcasts

**More likely to have a:**

**+22%** Paid Podcast Subscription

**+81%** Paid Podcast Sub. through Patreon

**More Likely to Listen to ...**

- ART-RELATED CONTENT
- SOCIETY & CULTURE
- LIFE & LEISURE

**Top 3 Podcast Platforms**

- SPOTIFY
- AMAZON MUSIC
- APPLE PODCASTS

# Podcast Connoisseurs

Extending beyond just books, podcasts are another popular choice. In fact, they are so popular that this group spends a **49% greater share of entertainment dollars on live streaming podcasts, followed by a 34% greater share spent on pre-recorded podcasts**. In particular, podcasts focused on art, culture, and leisure are of more interest to these consumers than average. More specifically, LGBTQ+ podcast listeners are **47% more likely than average to listen to art-related podcasts, followed by society & culture at 37%, and life & leisure at 22%** increased likelihood of consumption.

LGBTQ+ consumers get the most of their podcasting experience through purchasing paid subscriptions for podcast platforms such as Spotify, Amazon Music, Apple Podcasts, and more. In fact, they are **22% more likely than the average consumer to have a paid subscription to a podcast service.** Even alongside these mainstream platforms, alternative platforms such as Patreon are seeing more paid subscriptions from the LGBTQ+ population, with them being **81% more likely to have a paid podcast subscription through Patreon**. Having the ability to pick and choose which creators you subscribe to is a definite bonus with this platform and allows for a more customizable and intimate experience. You can even use Patreon as a one-stop shop for podcast episodes, video content, fan merchandise, and more. LGBTQ+ consumers are **17% more likely to purchase fan merchandise, collectibles, and memorabilia** (including, but not limited to Patreon), which is a great way to support one's favorite content creators.

For more details on LGBTQ+ consumership, see our Power of LGBTQ+ Music report here.

SECTION 7

# Women

~2/3

of women engage in entertainment with others

1/2

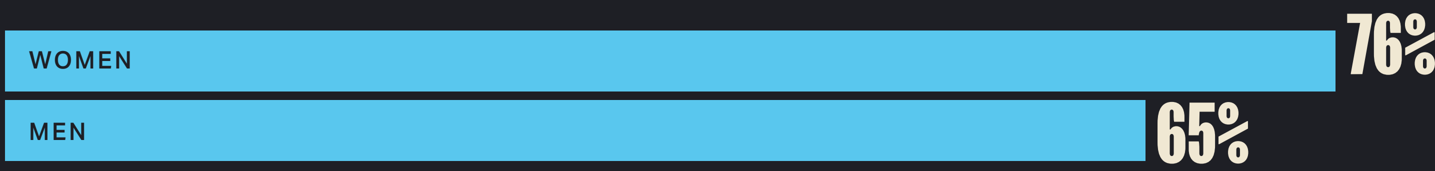
Agree that entertainment allows them to connect with their family and friends

# Social Multitaskers

Women engage in similar types of popular entertainment activities as the general population, but it's how they engage that stands out. Aligning to the general population, **the top activities for women are watching TV, listening to music, using social media, watching movies, and engaging with the news**. However, women are more inclined to invest their entertainment time in ways that allow them to **socialize with others**. Even when they aren't socializing, they prioritize activities that allow them to multitask and stay entertained at the same time.

For this group, the social aspect of entertainment is crucial to its enjoyment. When looking at this group's attitudes toward entertainment, women are **10% more likely than average to find it important to spend quality time with their friends and family** over doing solitary activities and to agree that they enjoy asking friends/family for entertainment recommendations. **Half of women also agree that entertainment allows them to connect with their family and friends, with just under ⅔ participating in entertainment activities with others on a regular basis**. Some of the top activities that they enjoy sharing with others include attending live music events, engaging with eSports, and listening to pre-recorded podcasts.

## ACTIVE ON SOCIAL MEDIA




**Top Social Media Platforms Among Women**

Facebook 88% · Instagram 65% · TikTok 48%

## ATTENTION IS DIVIDED

Women are **11% more likely to multitask** during entertainment activities. The top multitasking activities include ...

- Engaging with eSports
- Live Streaming Music Events
- Listening to Podcasts
- Live Music Events
- Listening to Audiobooks

# Social Media Attention

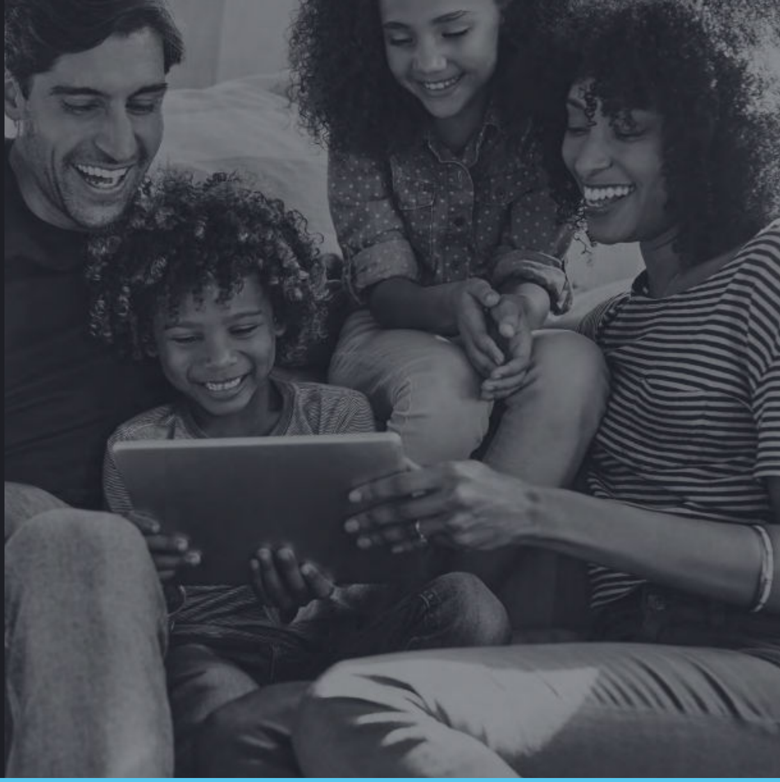
Most notably, this social dynamic can be seen in this group's go-to entertainment device choice and social media consumption. Smartphones are front and center when it comes to devices for entertainment, such that **75% of women use their smartphones for entertainment compared to only 68% of men**. This comes at no surprise considering their active engagement on social media. Top social media platforms among women are **Facebook, Instagram, and TikTok**. Platforms such as these have led to **76% of women being active on social media, surpassing men by over 10% in their usage**. Between Instagram reels, Facebook stories, and TikToks with cross-platform sharing capabilities, these integrations have led almost ⅓ of this group to enjoy, not just general social media, but short-form videos as well. Living in an era of rapid technological development in which new content is readily available at their fingertips, it's no wonder that women are at least **12% more likely to discover new content through social media influencers and social connections**. However, as social media holds this group's attention, it can be difficult to draw it elsewhere.

Although attentive on social media, this audience frequently splits their attention, often using entertainment in the background while doing other activities. Women are **11% more likely to multitask during their entertainment consumption** and are most likely to multitask while engaging with audio experiences such as audiobooks and pre-recorded podcasts. Interestingly, they also often multitask during more visual experiences such as live music events, even though these types of events are among the top activities they engage in with others. In fact, listed among some of their motivations to consume entertainment, women stated that they are motivated to consume entertainment when the activity gives them an escape from what they are doing and when it can be used in the background while doing other things. With this group, social time does not necessarily mean focused time.

## THINKING OF OTHERS

**+14%** More likely to pay for an entertainment subscription when it meets the needs of other household members

**+9%** More likely to pay for an entertainment subscription when they have the ability to create multiple user profiles



**-17%** Less likely to learn about a product in an ad

**-24%** Less likely to purchase a product from an ad

## TOP PAID SVOD SUBSCRIPTIONS

- NETFLIX
- AMAZON PRIME
- DISNEY+
- HBO MAX
- HULU

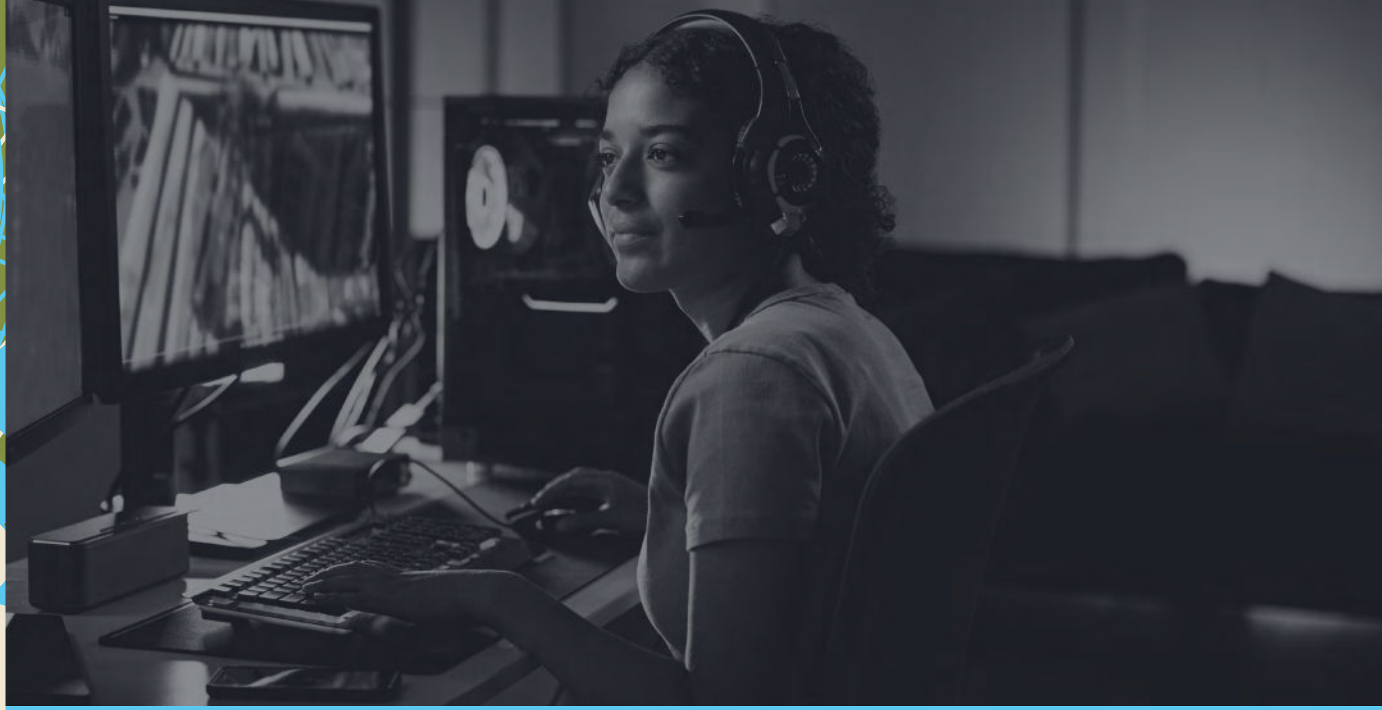
# Anti-Ad & Pro-Subscription

Multitasking and distraction has influenced this group's engagement with ads. While they spend an average amount of time on platforms with ads, they are less receptive to them. **They are 17% less likely to learn about and 24% less likely to purchase a product featured in an advertisement**, and are generally less satisfied with the amount of ads on free and ad-supported entertainment platforms. It is likely that this group is less attentive and aware of advertisements that are featured in their background entertainment activities.

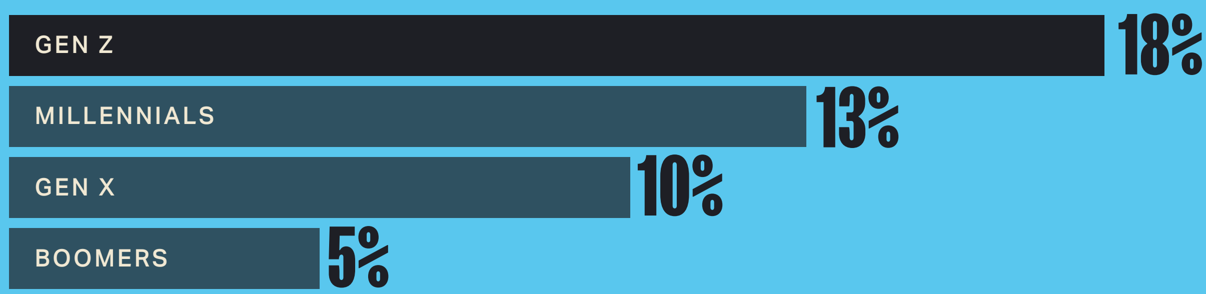
However, despite their attitudes towards ads and the fact that they spend 18% less on entertainment overall, **83% of respondents indicated that they have at least one paid entertainment subscription**, with top subscriptions including Netflix, Amazon Prime, Disney+, and HBO Max. As people who often put others first, women take loved ones into consideration when selecting subscription services. Women are **14% more likely to pay for an entertainment subscription service when that service meets the needs of different household/ family members**, followed by a **9% increased likelihood of purchase when they have the ability to create multiple user profiles**. With this group, sharing is caring.

SECTION 8

# Special Feature: Gen Z



**Share of Entertainment Dollars Spent on Gaming Expenses**




# Battling for 1st Place

As the first generation born into the digital age, Gen Z's lifetime is defined by technology, entertainment, and social interconnectivity. What's even more striking is that Gen Z seems to have combined all three into one through dominating the world of gaming. Compared to other generations, **Gen Z takes the #1 spot for their engagement with video games, virtual reality (VR), and eSports.** Part of the reason for this seems to be that Gen Z's preferences appeal to their underlying competitive nature — Gen Zers are **48% more likely than the average U.S. consumer to engage with entertainment because it allows them to be competitive**.

Dominated by online play, Gen Z are getting their competitive juices flowing, being most likely to engage in **battle royale, sandbox (e.g., Animal Crossing), and horror games**. While Gen Z gamers are more likely to play all the popular games out today, they are almost 2x as likely to play popular titles such as *Roblox*, *Apex Legends*, and *Among Us*, compared to the average gamer. Sports leagues and games have also become an inseparable dynamic duo as seen in popular NBA 2K and FIFA 22 games, alongside a carved out, multi-billion dollar eSports sector.

ENTERTAINMENT CONNOISSEURS

**~50%**
More likely to live stream music events

**+33%**
More likely to go to live, in-person music events

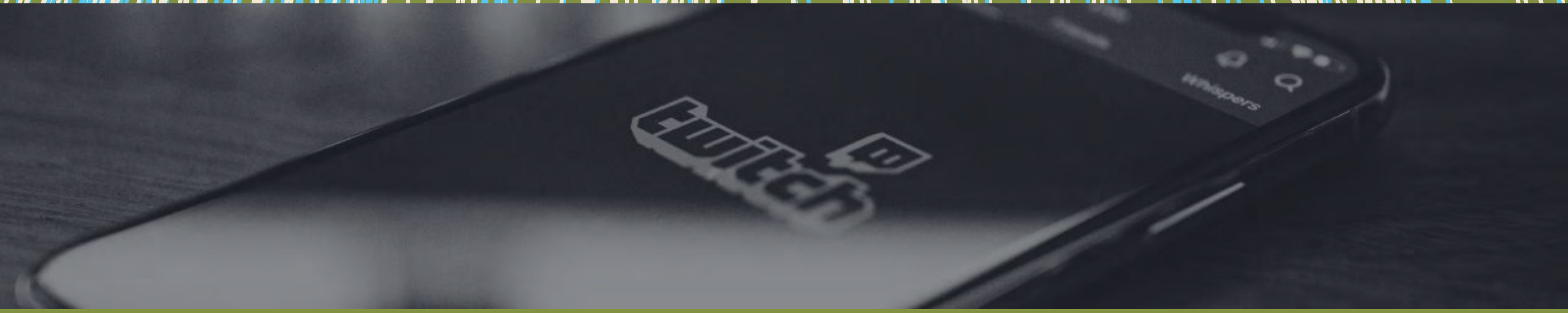
**+20%**
More likely to watch movies

# Gaming Is Life

As a tech savvy generation, **Gen Z invests 11% more money on entertainment** each month than average, despite more limited income. Relatively high price point devices like specialized headphones and VR equipment are a priority for this group of devoted gaming enthusiasts — **they are the *only generation* to spend their greatest share of entertainment dollars on gaming expenses**. Plus, **Gen Z is 75% more likely than the average consumer to use game consoles for entertainment** in general. With cross-device compatibility for apps like Spotify, Netflix, and YouTube, game consoles enable this generation to quickly access all of their entertainment favorites in one spot.

Entertainment crossovers and gaming partnerships fuel streamlined entertainment experiences where consumers aren't forced to choose just one entertainment vertical. Considering that gaming is a passion point for Gen Z, this is especially true for winning with this audience. Gamers are some of the biggest entertainment buffs, offering a conduit for well-integrated content. Compared to the average U.S. consumer, **Gen Z gamers are almost 50% more likely to live stream music events, 33% more likely to attend live music events, and 20% more likely to watch movies**, just to name a few. Well-known celebrities like Travis Scott and Ariana Grande are using live streamed gaming integrations to connect with Gen Z audiences. And remember Lady Gaga popping up as a larger-than-life countess in the American Horror Story anthology? Or have you seen *Stranger Things*' latest online game where players can solve puzzles to win show-themed NFTs?

For more details on gaming and music, see our Gaming + Music report here.




POWERING THE TRENDS

**Compared to the average social media user, Gen Z is ...**

**+116%** More likely to use Twitch

**+94%** More likely to use Snapchat

**+73%** More likely to use Tumblr

**+56%** More likely to use TikTok

**+50%** More likely to use Discord, Whatsapp, etc.

CONTENT DISCOVERY

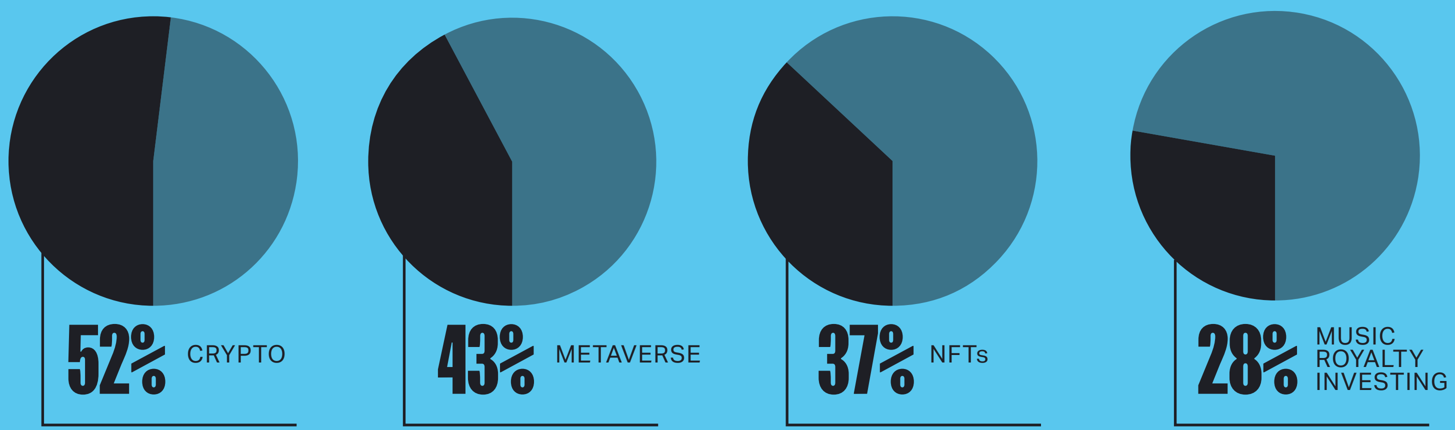
**They are more likely to discover new content through...**

| | |
|---|---|
| SOCIAL MEDIA INFLUENCERS | +75% |
| VIDEO GAMES | +69% |
| AUDIO STREAMING SERVICES | +53% |

# Social Influence

Integrated experiences and gaming enthusiasm are also clearly present in Gen Z's social media habits. Gen Z is **116% more likely to use Twitch** than the average U.S. social media user. Alongside this, they are **50% more likely to use communication apps like Discord and Whatsapp** — those that are commonly used to connect with online friends during gaming sessions. Even with the near universal acceptance of social media apps, **Gen Z gamers in particular are 20% more likely to engage on social media sites** compared to Gen Pop. Apart from its usefulness for connecting with friends and family, social media is utilized as a way to live stream music artists and allow consumers to feel like they have a personal connection to celebrities. And let's not forget its power as a discovery outlet, with many emerging artists rising to fame and "getting discovered" on social platforms like TikTok. Gen Z are the ones powering these trends as they are **56% more likely to use TikTok** than average social media users.

## % of Familiarity with Crypto, NFTs, Metaverse, and Music Royalty Investing




# The Virtual World Is Here

Speaking to their interests for new and "up-and-coming" content and artists, this group also has a penchant for exclusive content and bonus features provided by many online game franchises. Downloadable bonus content not only has allowed players to connect with new music artists, but it has also introduced consumers to the concept of digital currency. In order to stay afloat in a competitive market, many games have started to implement digital currency systems in which players can use in-game currency to unlock costumes, weapons, avatars, and more. This insular currency system is not too unlike that of **cryptocurrency — something that Gen Z is 16% more likely to be familiar with compared to the average consumer**. Similarly, customizable game avatars and player calling cards are not so different from NFTs. Likewise, **Gen Z is tied with Millenials for the highest NFT awareness rates**. Within the same realm, **Gen Zers are the most familiar with the Metaverse** compared to other generations. It's abundantly clear that Gen Z is on the cutting edge of technology and virtual environments in particular, a perk of being born into the digital age.

For more on the Future of Entertainment, preview our Spotlight Series here.

For more information, contact
data.research@luminatedata.com

For media inquiries, contact
press@luminatedata.com

# About Luminate

Luminate is the preeminent entertainment data and insights company, unleashing access to the most essential, objective, and trustworthy information across music, film and television, with data compiled from hundreds of verified sources. Today, the company maintains its more than 30-year legacy of accurate storytelling by powering the iconic Billboard music charts, while also acting as the premiere database for the television and film industries. Working closely with record labels, artists, studios, production companies, networks, tech companies, and more, Luminate offers the most valued source of comprehensive, independent, and foundational entertainment data that drives industry forward. Operating independently, Luminate is owned through a joint venture between Penske Media Corporation and Eldridge.