

Presentation of Results

**Audio-visual consumption and reading habits of  
young people**

Rome, ITALY  
November 23, 2018



## Survey to youths – general population



**Universe:** young people among 18 and 29 years old.



**Geographical range:** international: Argentina, Colombia, Italy, France, Germany, Mexico, Spain, UK and the US.



**Data-gathering process:** computer-assisted Web interviewing (CAWI) to a panel of youths, representative of the population of people from 18 to 29 years old of each country surveyed, conducted in the majority language of each country (English, French, German, Italian and Spanish).



**Quotas:** designed according to the distribution of the population in each surveyed country, regarding sex, age and geographical area of residence.



**Sample size:** 3,694 interviews: 400+ complete interviews in each country.



**Sampling error:**  $\pm 1.7\%$  for the whole sample ( $n=3,600$ ), and  $\pm 5\%$  for each country ( $n=400$ ), for a 95.5% level of confidence (two sigmas) and in the most unfavorable hypothesis of  $P=Q=0.5$ , in the postulation of simple random sampling.



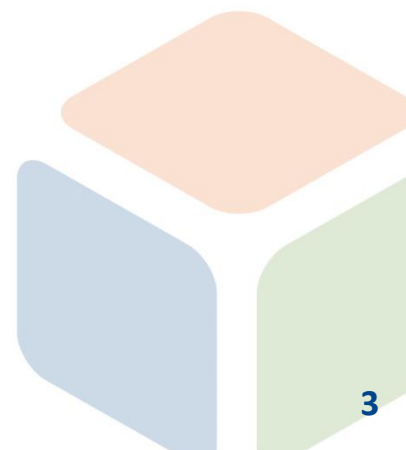
**Duration of the interview:** 12 – 15 minutes, approximately.



**Interviewing dates:** May and June, 2018.



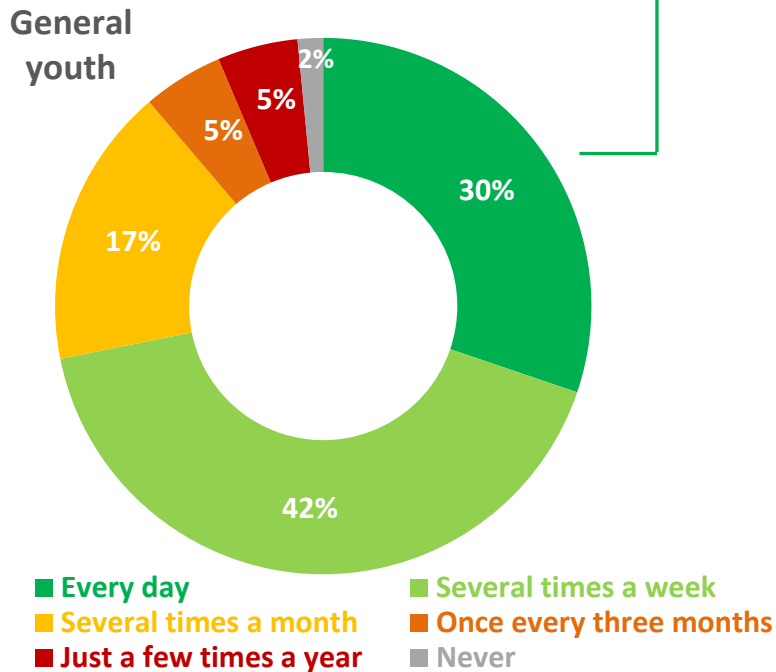
# TV Series, a magnet for today's youths



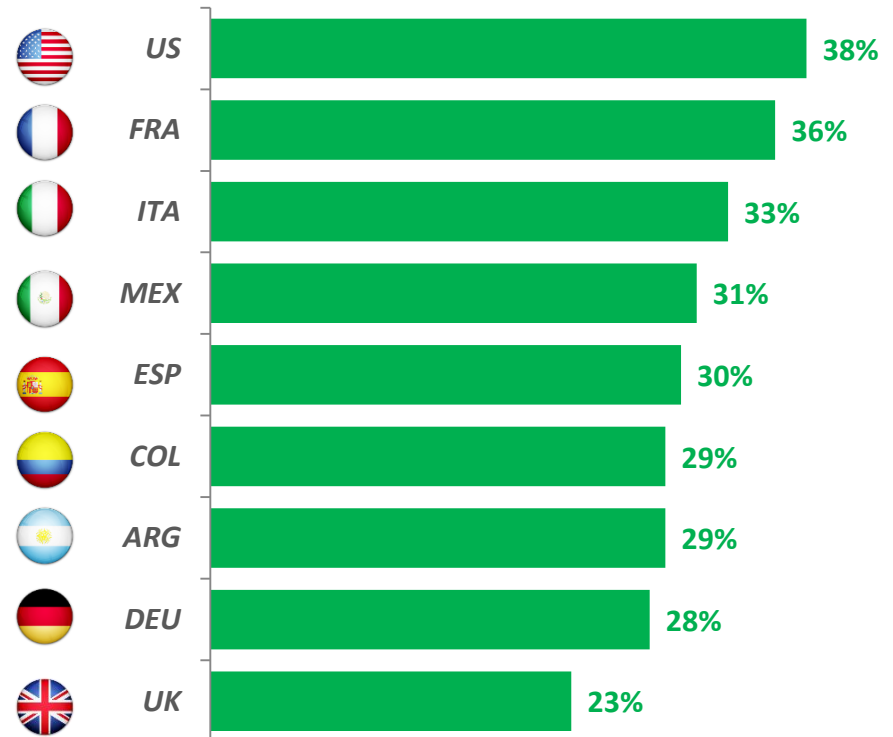
# TV series, most-watched items nowadays



- **TV series have a high degree of viewing** among young people. 72% of youths from the general population watch TV series several times per week.
- **US youngsters are the ones who watch TV series** more frequently; 38% watch TV series every day. Out of those who watch TV series every day, Americans are once more the ones who show a more intense consumption; 86% watch TV series for **more than two hours a day**.



Shows % of people who watch series every day, by country



How often do you watch series?

# Sitcoms, the most-watched TV series genre

- **Sitcoms** emerge as the TV series-genre most watched internationally, with *The Bing Bang Theory* and *Friends* ranking on top.
- The second genre is **Adventures/Thriller**, highlighting Spanish *Money Heist* in Latin-America and *Game of Thrones* in Europe.

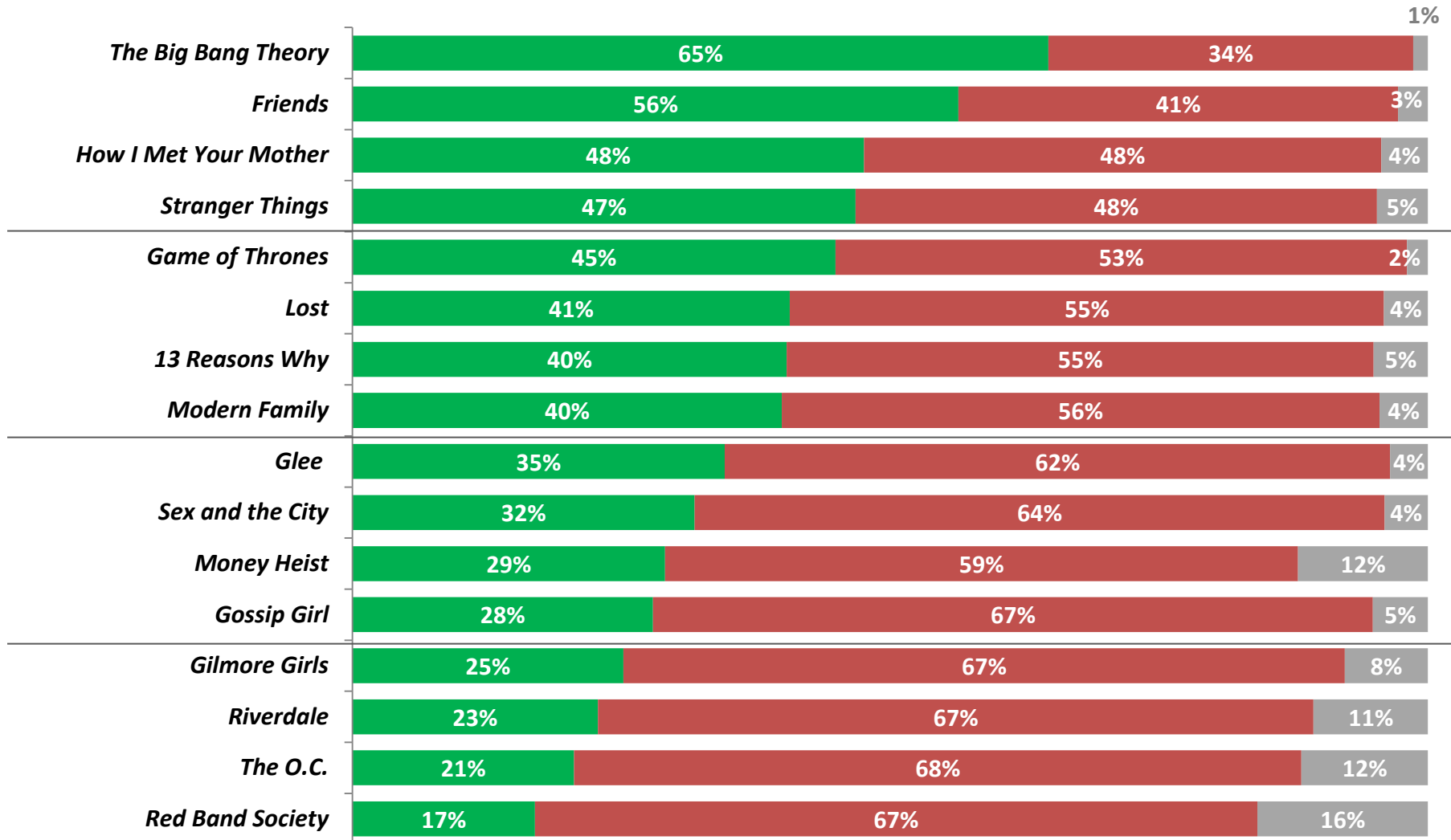
1º	  Los Simuladores	  El cartel de los Sapos	  The Big Bang Theory	  The Big Bang Theory	  Friends	  The Big Bang Theory	  The Big Bang Theory	  Friends	  The Big Bang Theory
2º	 Lost	 The Big Bang Theory	 Friends	 Modern Family	 The Big Bang Theory	 I Cesaroni	 How I met your mother	 The Big Bang Theory	 Friends
3º	 La Casa de Papel	 La Casa de Papel	 Lost	 Friends	 Game of Thrones	 The OC	 Game of Thrones	 How I met your mother	 How I met your mother

Ranking of most-watched TV series, from the tested panel

# The Big Bang Theory, the most-watched TV series



■ Yes ■ No ■ I haven't even heard of it

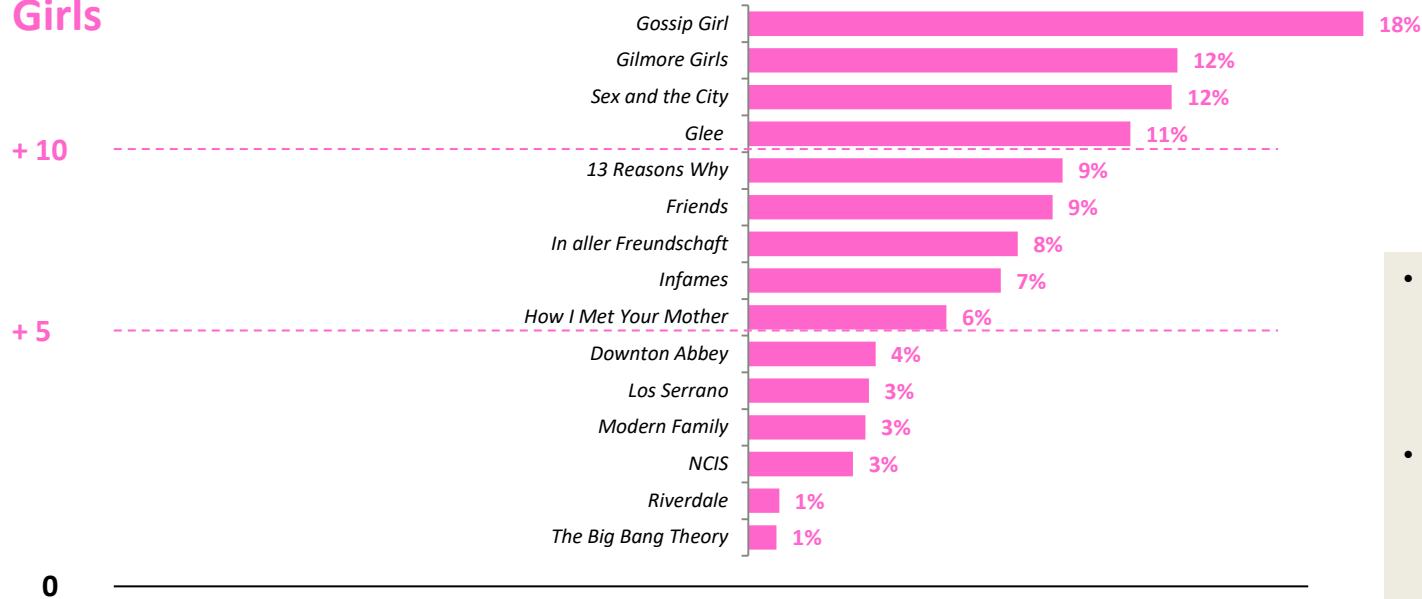


Have you been following the series ...?

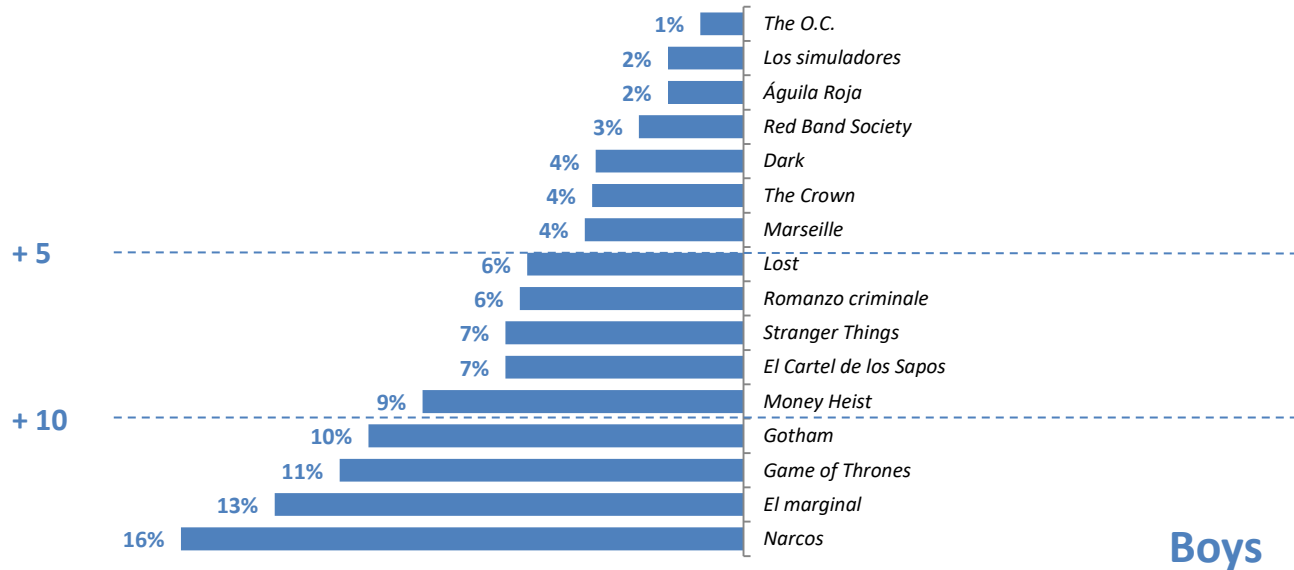
# From Gossip Girl to Game of Thrones



## Girls



Graph: Difference of points of percentage of viewing between boys and girls



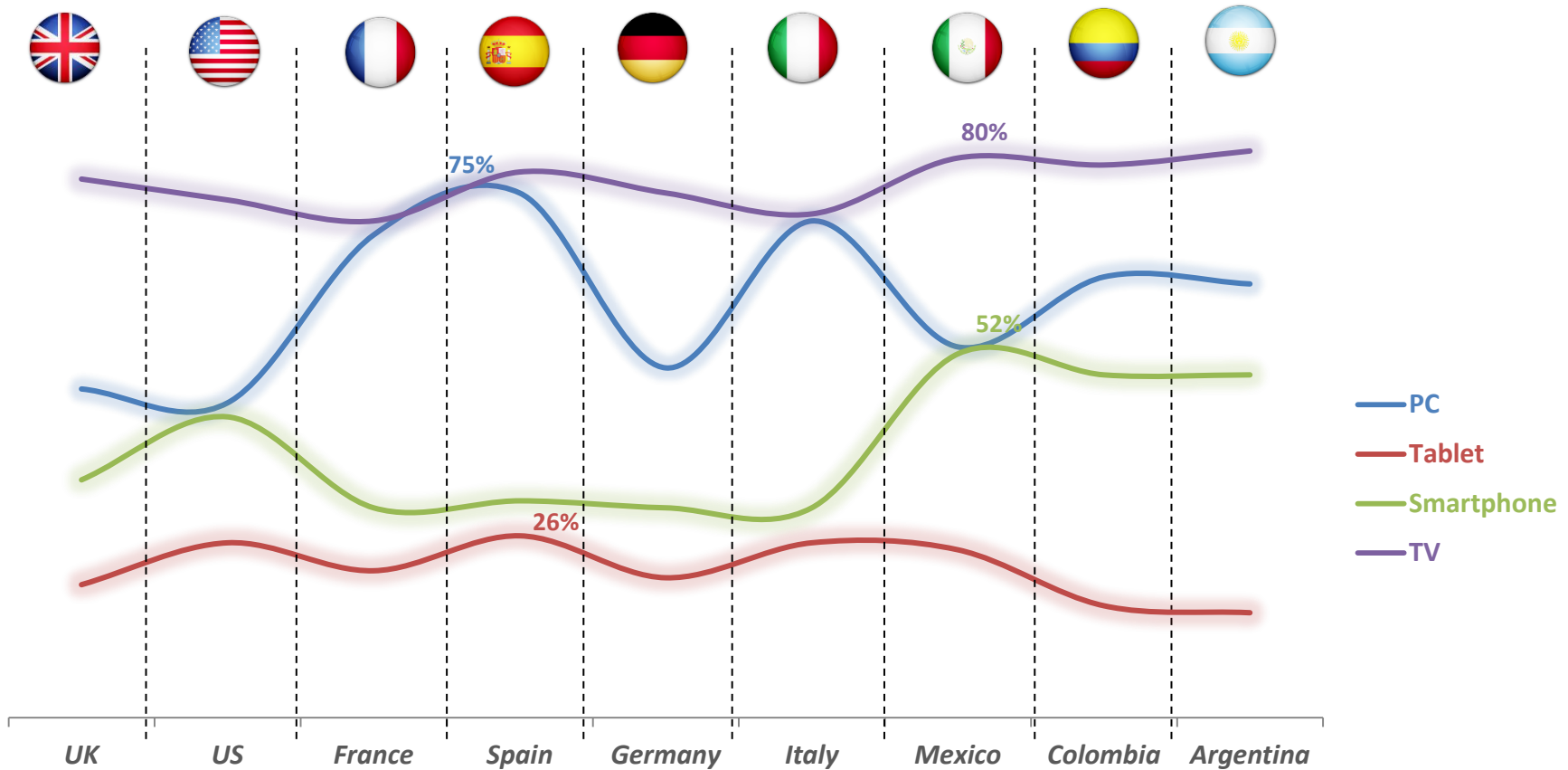
## Boys

- Which are the genres in which more difference in viewing between boys and girls can be seen?
- **GIRLS.** Sitcoms and romantic comedies are the genres in which more differences with boys can be seen. *Gossip Girl*, *the Gilmore Girls*, *Sex & The City* and *Glee* are clear examples.
- **BOYS.** Action TV series is the genre in which more differences with girls can be seen. *Game of Thrones* is the one more salient (in Colombia and Argentina, *Narcos* and *El Marginal*, respectively).

# TV, the most-used device to watch series



- Three out of four young people watch series on TV, which is the most-used device.
- The youth from the Latin American countries, as well as from Spain, are the ones who most use **TV** to watch series.
- Youths of the Mediterranean (Spain, Italy and France) are the ones who do a more intense use of **PC/laptops** to watch series.
- Regarding **smartphones**, Latin America is the geographical area where the percentage of TV series watching is higher.



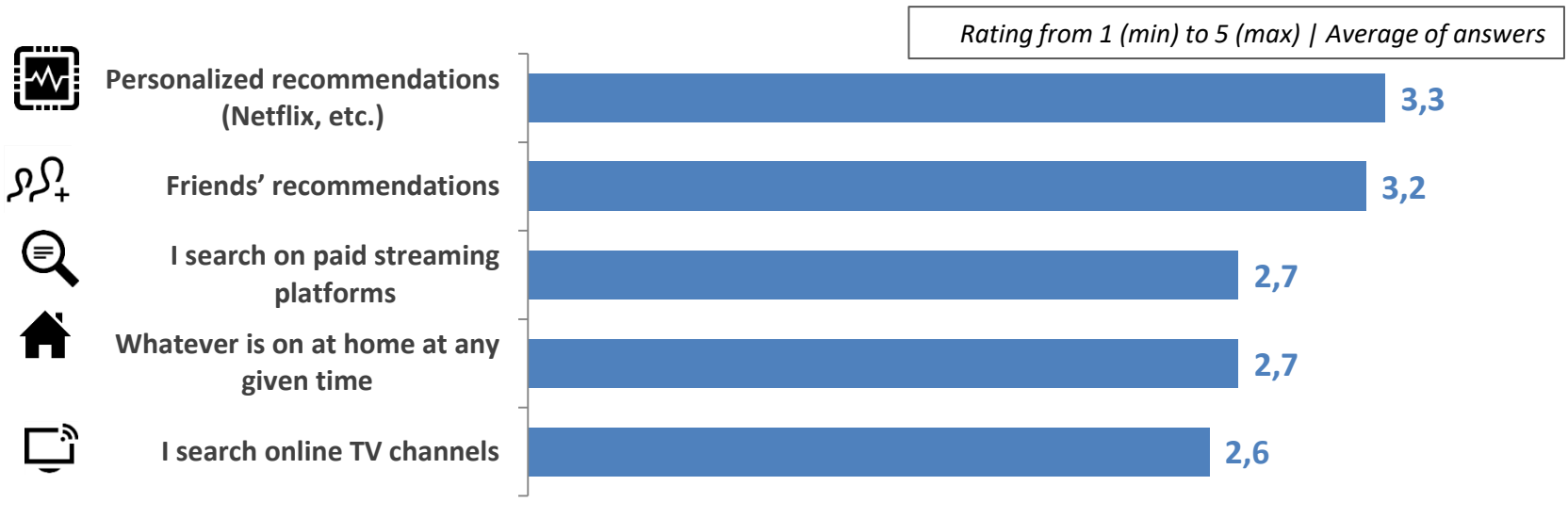
What devices do you use to watch the series?



# Algorithms, the first source to choose a TV series



- Young people rely on algorithmic personalized suggestions made by their TV series provider even more than on friends' recommendations. The Anglo-Saxon and the Latin American countries are the areas where this trend is more clearly seen.
- **Mediterranean youths** (Italy, Spain and France) are the ones who still value more their friends' recommendation.



	UK	US	FRA	ESP	DEU	ITA	MEX	COL	ARG
<i>Personalized recommendations (Netflix, etc.)</i>	3,2	3,5	3,0	3,1	3,1	3,0	3,2	3,4	3,3
<i>Friends' recommendations</i>	3,1	3,3	3,1	3,3	3,0	3,4	3,1	3,3	3,2
<i>I search on paid streaming platforms</i>	3,0	3,1	2,1	2,6	2,2	2,4	2,7	2,3	2,3
<i>Whatever is on at home at any given time</i>	2,8	3,0	2,7	2,4	2,5	2,6	2,5	2,5	2,5
<i>I search online TV channels</i>	2,7	2,8	2,4	2,5	2,5	2,9	2,3	2,7	2,2

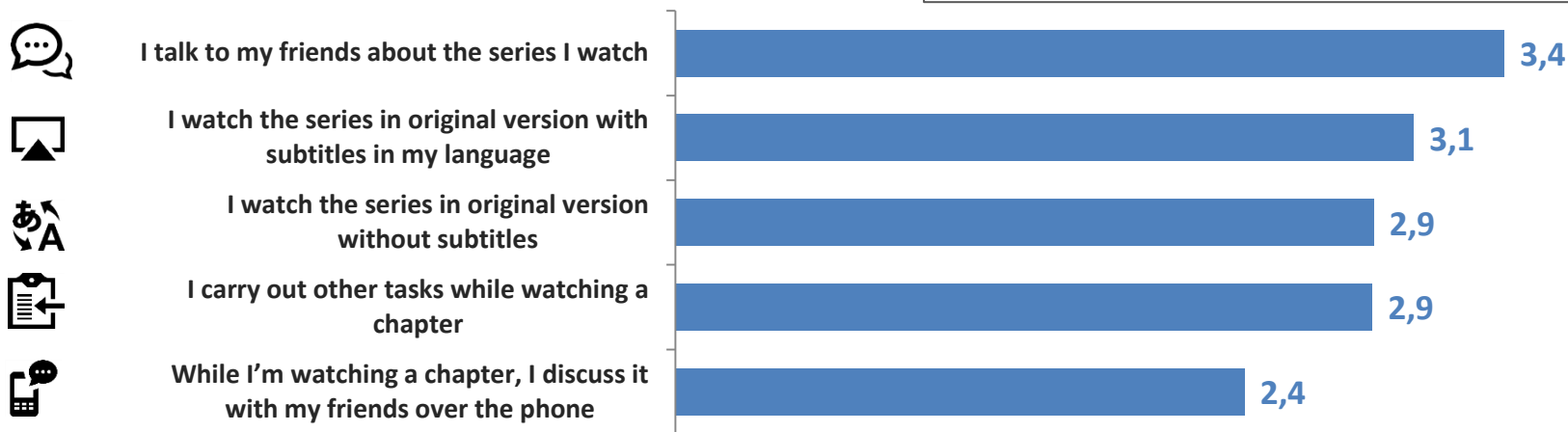
To what degree do you choose to watch a series via...?

# Talking to friends about TV series, the most spread habit



- **Talking to friends** about the watched TV series is the most spread habit among young people.
- Spanish youngsters are the ones who do it more often, and Germans the ones who do it less frequently.

Rating from 1 (min) to 5 (max) | Average of answers



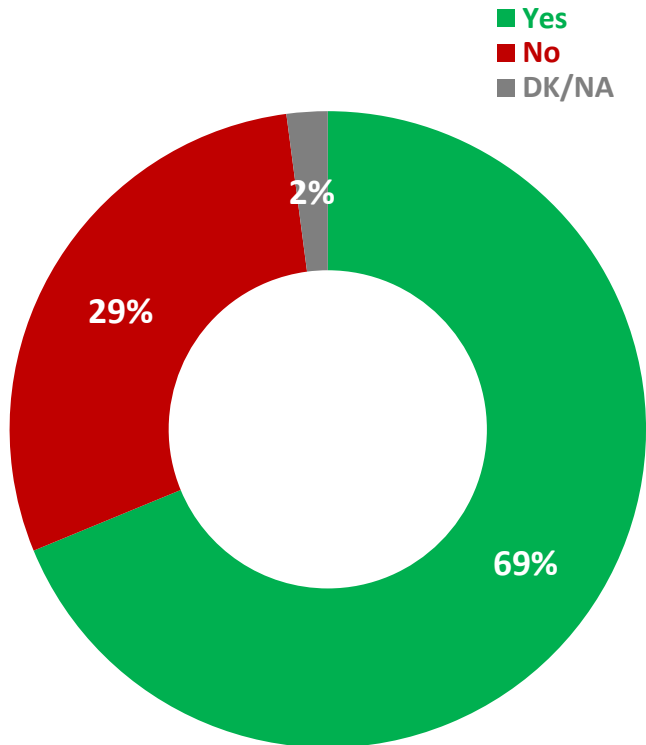
	UK	US	FRA	ESP	DEU	ITA	MEX	COL	ARG
<i>I talk to my friends about the series I watch</i>	3,3	3,5	3,4	3,7	3,2	3,5	3,4	3,5	3,5
<i>I watch the series in OV without subtitles</i>	3,3	3,5	2,3	2,4	2,3	2,2	2,6	2,4	2,3
<i>I watch the series in OV with subtitles in my language</i>	2,7	3,1	3,0	2,8	2,7	2,7	3,4	3,3	3,5
<i>I carry out other tasks while watching a chapter</i>	2,9	3,2	2,6	2,7	2,9	2,5	2,7	2,7	2,4
<i>While watching a chapter, I discuss it with friends (phone)</i>	2,4	2,6	2,4	2,2	2,3	2,2	2,1	2,2	2,1

And how often...?

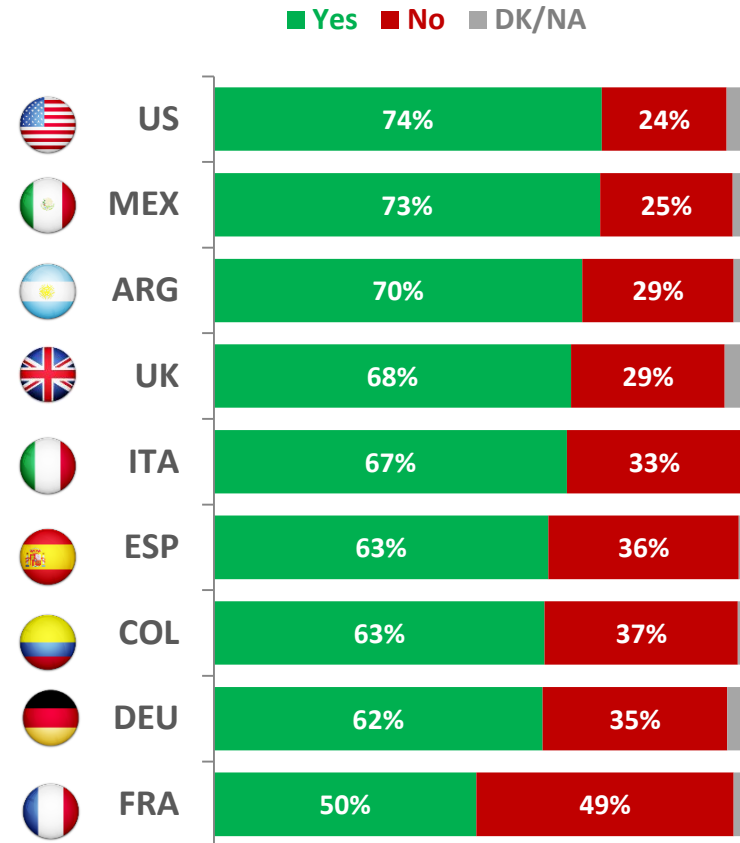
# TV series streaming platforms



- **Seven out of ten young people are subscribed** to a paid streaming platform to watch TV series.
- **The US and Mexico** are the countries with the highest subscription rate.



Are you subscribed to a paid streaming platform to watch the series? (Whether you are the titleholder of the account or if you use the household account)



# Netflix, the most popular *streaming* platform

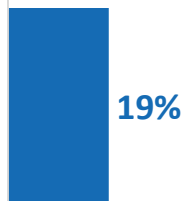


- From those youngsters who are subscribed to a *streaming* platform, the majority has an account on **Netflix**.
- **Amazon Prime** comes in second, while **HBO** is third.

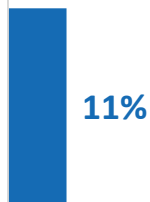
**NETFLIX**



**amazon prime video**



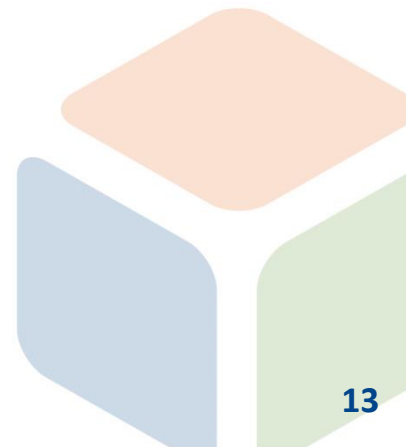
**HBO**



Which one/s?

	1º	2º	3º	4º
<b>MEX</b>	Netflix 68%	Claro 11%	Izzi 11%	Megacable 11%
<b>ARG</b>	Netflix 65%	Cablevisión 19%	DirectTV 15%	HBO 10%
<b>UK</b>	Netflix 59%	Amazon V 23%	Sky 17%	BBC 14%
<b>USA</b>	Netflix 58%	Hulu 27%	Amazon V 25%	HBO 17%
<b>COL</b>	Netflix 58%	HBO 9%	Movistar+ 7%	DirectTV 6%
<b>ESP</b>	Netflix 50%	HBO 18%	Amazon V 18%	Movistar+ 16%
<b>ITA</b>	Netflix 49%	Sky 24%	Infinity 10%	Mediaset 8%
<b>DEU</b>	Netflix 47%	Amazon V 36%	Sky 14%	Maxdome 6%
<b>FRA</b>	Netflix 45%	Amazon V 7%	SFR 5%	Free 5%

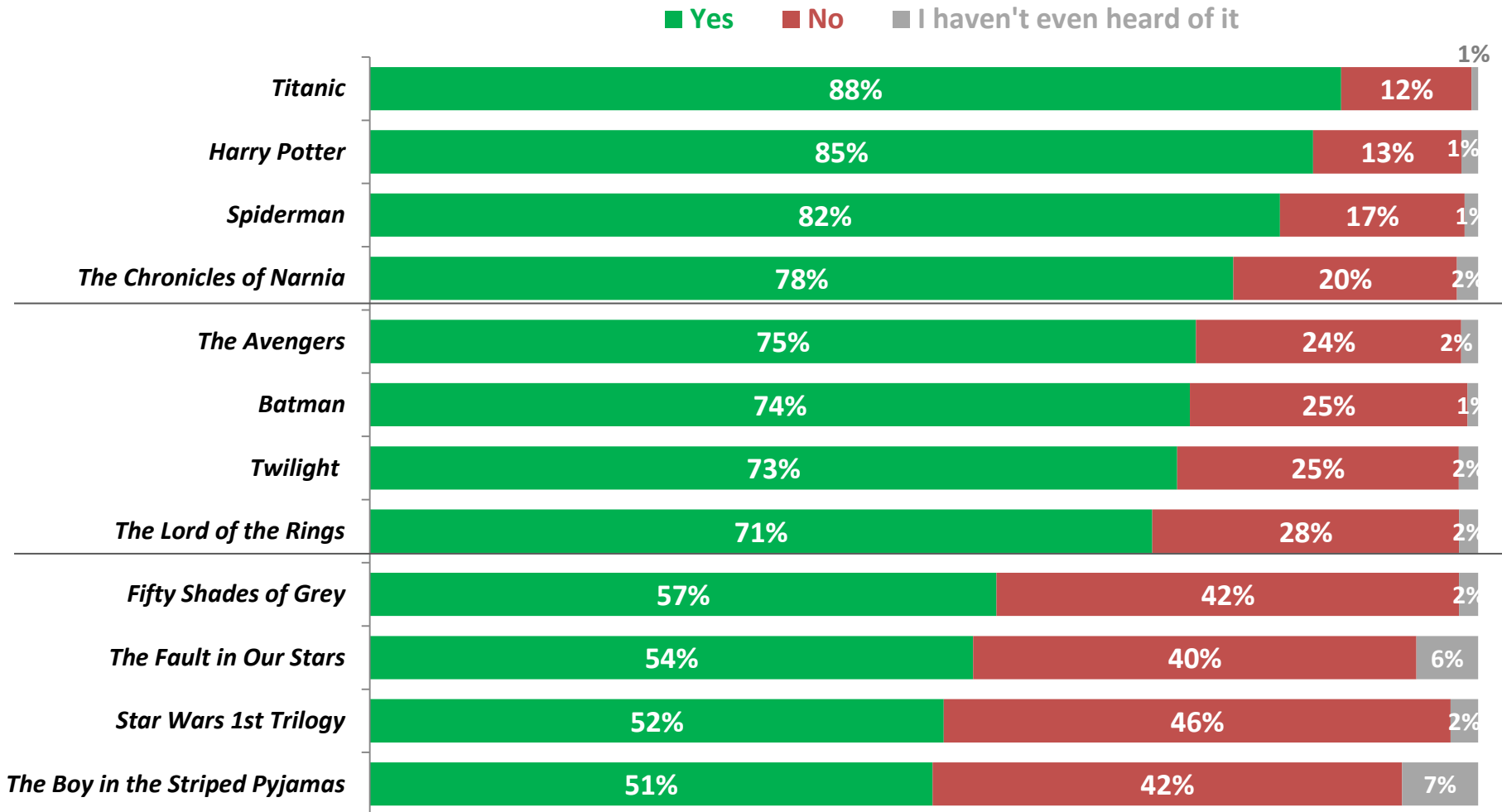
# Film-watching, a very frequent habit among youths



# Globalized preferences in a globalized world



- Young people in the Western world show similar attitudes and preferences towards the main films they prefer watching.



Ranking of most-watched movies, from the tested panel

# Titanic, the most-watched film

- *Titanic* is the most-watched movie among young people internationally. From the panel of films tested, it ranks 1<sup>st</sup> in 6 of the 9 surveyed countries.

1 <sup>o</sup>	  Titanic	  Titanic	  Titanic	  Harry Potter	  The Intouchables	  Titanic	  Harry Potter	  Titanic	  Titanic
2 <sup>o</sup>	 Spiderman	 Spiderman	 Spiderman	 Titanic	 Titanic	 Harry Potter	 Titanic	 Harry Potter	 Harry Potter
3 <sup>o</sup>	 Harry Potter	 The Chronicles of Narnia	 The Chronicles of Narnia	 Spiderman	 Harry Potter	 La vita è bella	 The Intouchables	 Spiderman	 Spiderman

Ranking of most-watched movies, from the tested panel

# Geography explains the main differences

- Despite global preferences, some important differences arise in geographical terms.
- Three blocks in likeness appear: Europe, Latin America and the two main Anglo-Saxon countries (the UK and the US).

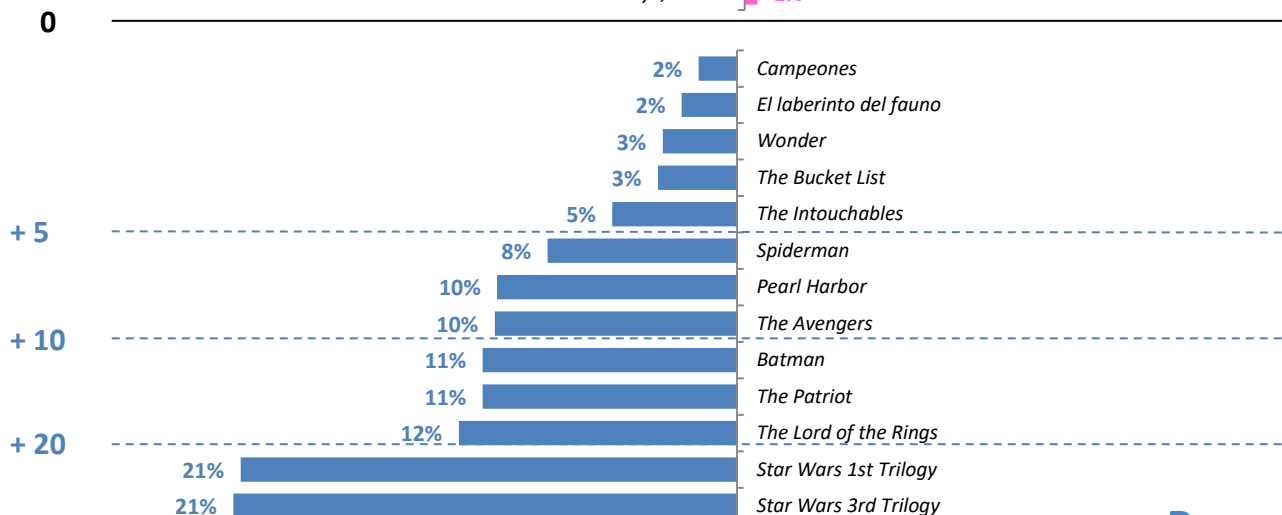
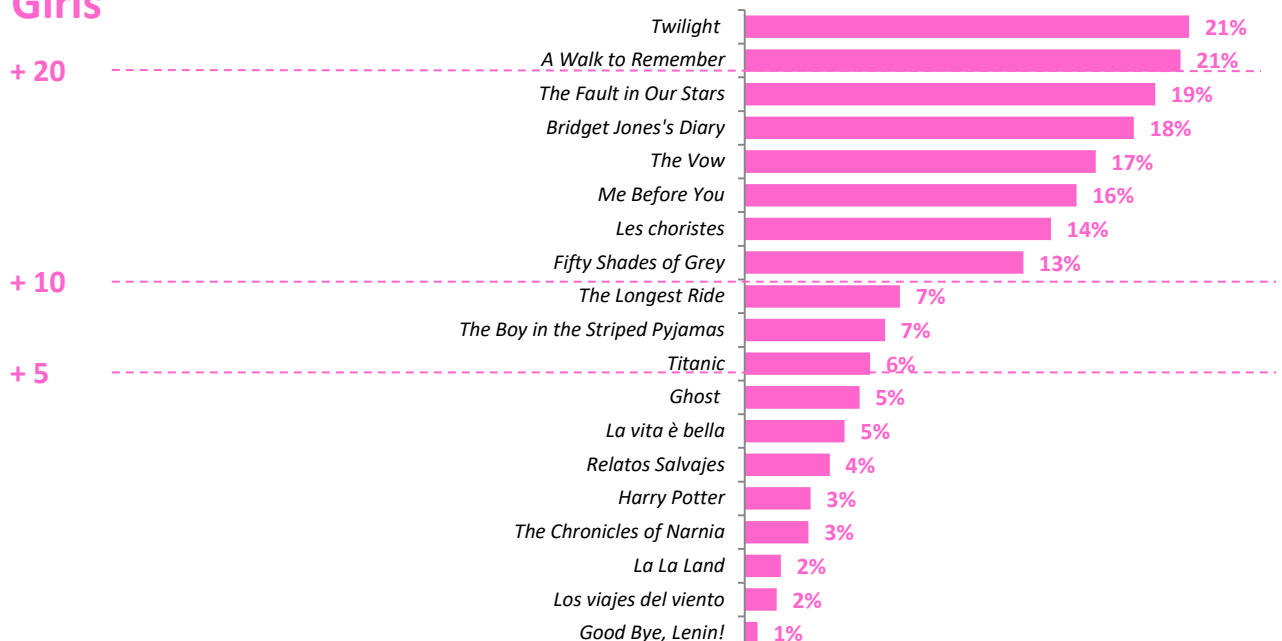
Films tested in all countries	Europe					America		Latin America	
	Italy	France	Spain	Germany	UK	US	Argentina	Colombia	Mexico
<i>Titanic</i>	91%	88%	90%	84%	89%	80%	95%	98%	97%
<i>Harry Potter</i>	90%	87%	91%	86%	88%	79%	92%	91%	90%
<i>Spiderman</i>	82%	83%	84%	75%	77%	75%	93%	95%	94%
<i>The Lord of the Rings</i>	75%	69%	78%	70%	69%	64%	77%	83%	77%
<i>The Chronicles of Narnia</i>	74%	73%	79%	60%	75%	73%	89%	94%	92%
<i>The Intouchables</i>	74%	88%	70%	77%	16%	19%	63%	62%	64%
<i>Twilight</i>	73%	68%	75%	65%	68%	69%	76%	88%	82%
<i>Batman</i>	72%	68%	68%	63%	69%	72%	81%	88%	83%
<i>The Boy in the Striped Pyjamas</i>	68%	13%	79%	27%	56%	42%	59%	71%	71%
<i>The Avengers</i>	64%	71%	69%	56%	69%	71%	79%	91%	91%
<i>Ghost</i>	61%	37%	46%	30%	36%	29%	45%	34%	60%
<i>Fifty Shades of Grey</i>	57%	53%	62%	54%	51%	50%	62%	75%	66%
<i>Pearl Harbor</i>	54%	53%	56%	45%	38%	44%	47%	57%	54%
<i>The Fault in Our Stars</i>	49%	42%	47%	48%	45%	51%	69%	69%	67%
<i>Star Wars 1st Trilogy</i>	46%	58%	56%	48%	51%	52%	46%	44%	56%
<i>Me Before You</i>	41%	21%	39%	28%	33%	31%	44%	58%	60%
<i>Star Wars 3rd Trilogy</i>	41%	55%	55%	47%	51%	50%	43%	45%	52%
<i>La La Land</i>	33%	28%	37%	22%	34%	27%	23%	38%	36%
<i>A Walk to Remember</i>	25%	16%	30%	20%	18%	39%	26%	26%	37%
<i>The Longest Ride</i>	25%	13%	25%	25%	18%	28%	25%	23%	24%
<i>Wonder</i>	24%	12%	24%	17%	16%	28%	25%	37%	34%
<i>The Bucket List</i>	24%	8%	34%	30%	27%	40%	55%	39%	42%
<i>The Vow</i>	23%	28%	51%	29%	30%	34%	40%	48%	47%
	Italy	France	Spain	Germany	UK	US	Argentina	Colombia	Mexico
Films tested in each country	<i>La vita è bella</i>	<i>Les choristes</i>	<i>Campeones</i>	<i>Good Bye, Lenin!</i>	<i>Bridget Jones's Diary</i>	<i>The Patriot</i>	<i>Relatos Salvajes</i>	<i>Los viajes del viento</i>	<i>El laberinto de la fauna</i>
	89%	71%	23%	30%	58%	34%	69%	20%	68%



# From Twilight to Star Wars



## Girls



- **GIRLS.** Again love and romantic films, such as *Twilight* and *A walk to remember*, are the ones in which more difference in viewing can be seen with boys.
- **BOYS.** Adventure & action movies, such as *Star Wars* and *The Lord of the Rings*, are the ones in which more difference in viewing can be seen with girls.

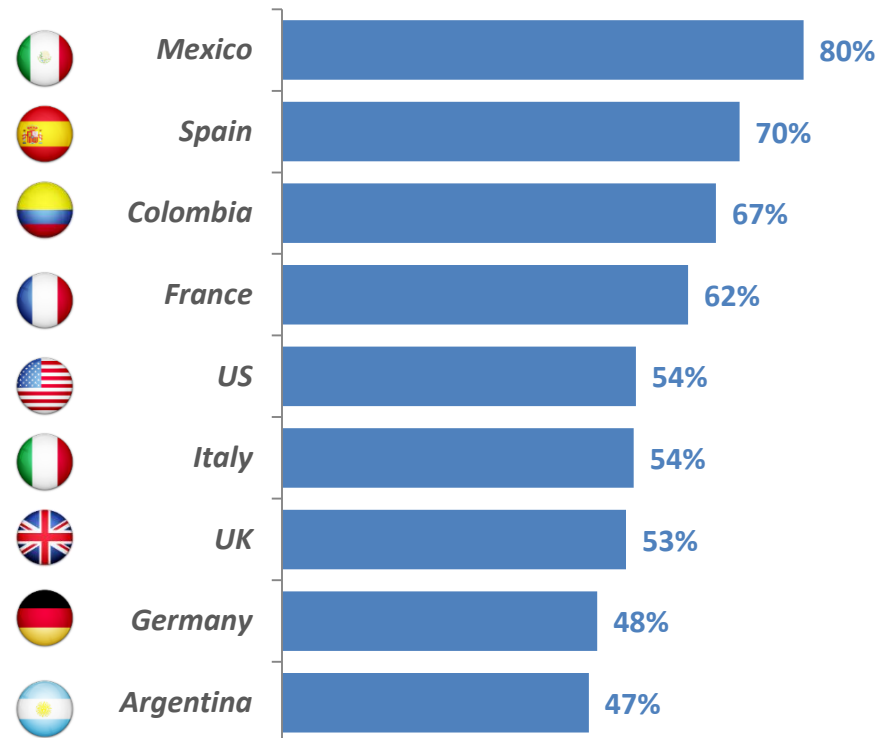
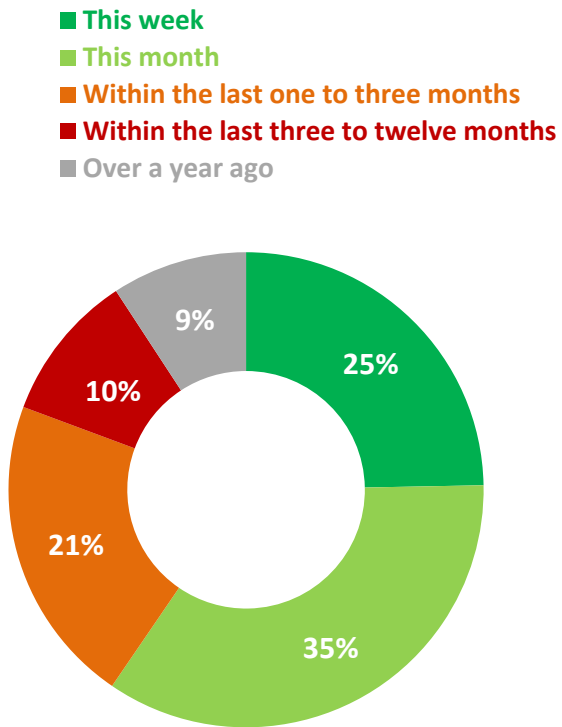
Graph: Difference of points of percentage of viewing between boys and girls

## Boys

# Young people go to the cinema very frequently



- Six out of ten youths watched a movie on the cinema in the last month.
- **Mexicans** are the ones who go more frequently to the cinema.



When was the last time you went to the cinema?

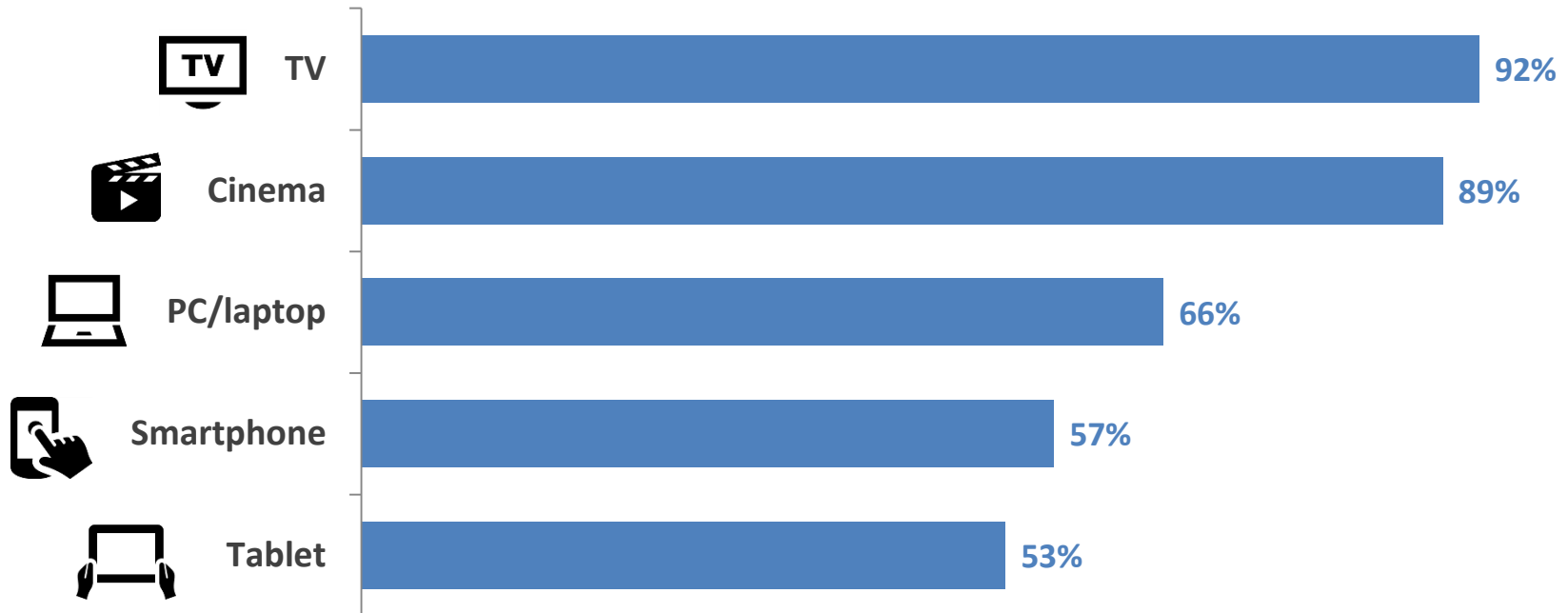
When was the last time you went to the cinema?  
(For those who answered this week or this month)

# TV, the main screen to watch movies on



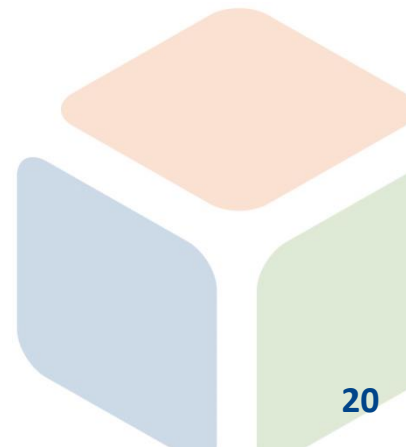
- TV is the most-used device to watch movies; 92% of young people watch at least a movie per month on this device.
- The majority of young people (28%) watch between **3 and 5 movies per month on TV.**

% of youths who watch at least a movie per month, by devices



How many films per month do you watch via these formats?

# Reading books: a challenge

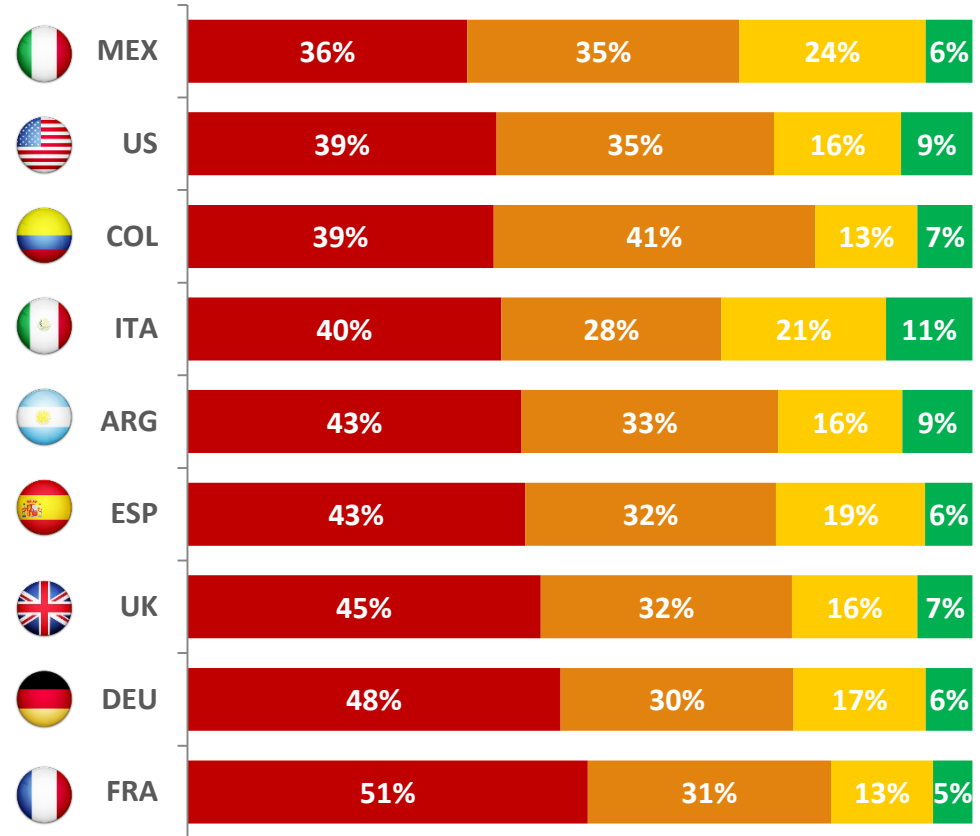
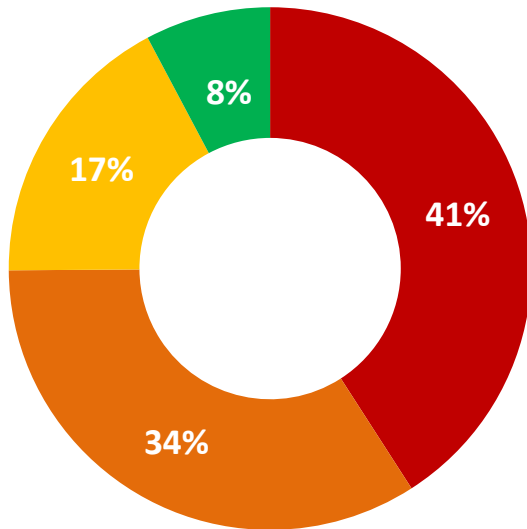


# Not much time devoted to reading



- Three out of four youngsters **read less than two hours per week**, according to the survey conducted.
- Mexican youths are the one who read more, while French are the ones who read less.
- **Italy is the country that scores highest regarding youths who read more than five hours per week, with 11%.**

- **Less than 1 hour**
- **Between 1 and 2 hours**
- **Between 2 and 5 hours**
- **More than 5 hours**



How many hours a week do you spend reading? (Not including studies, work or newspapers)

# Harry Potter, the most-read book

- Youths show a strong preference towards powerful stories featuring youths like them, like *Harry Potter*, divided into several books within a saga, as well as for classics of reference, such as *The Little Prince*.

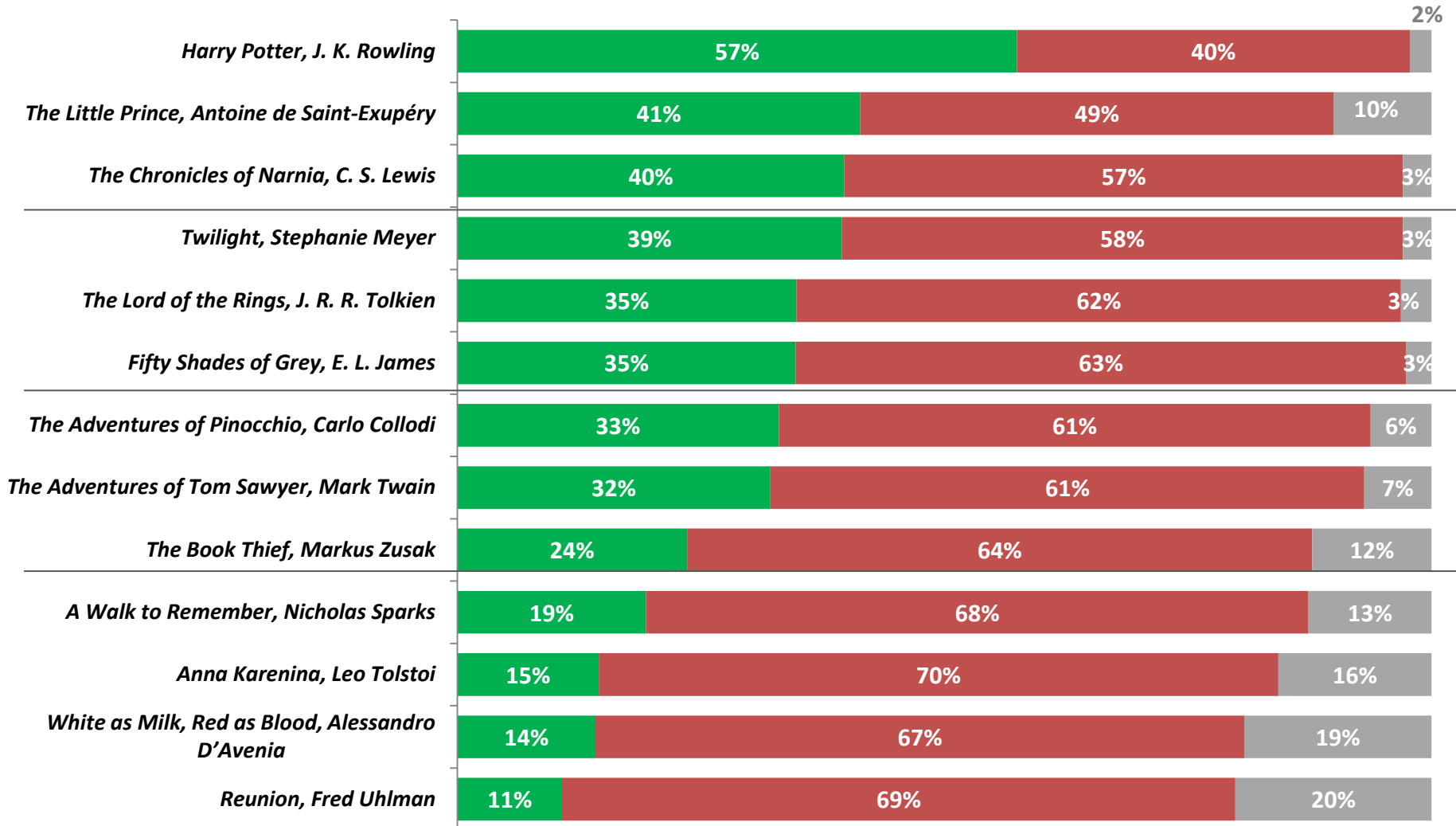
1º	  <p>The Little Prince</p>	  <p>The Little Prince</p>	  <p>The Little Prince</p>	  <p>Harry Potter</p>	  <p>The Little Prince</p>	  <p>Adventures of Pinocchio</p>	  <p>Harry Potter</p>	  <p>Harry Potter</p>	  <p>Harry Potter</p>
2º	 <p>Harry Potter</p>	 <p>Adventures of Pinocchio</p>	 <p>Harry Potter</p>	 <p>The Little Prince</p>	 <p>Harry Potter</p>	 <p>Harry Potter</p>	 <p>Tagebuch der Anne Frank</p>	 <p>Chronicles of Narnia</p>	 <p>Chronicles of Narnia</p>
3º	 <p>Adventures of Pinocchio</p>	 <p>Fifty Shades of Grey</p>	 <p>The Chronicles of Narnia</p>	 <p>Fifty Shades of Grey</p>	 <p>Les Misérables</p>	 <p>The Little Prince</p>	 <p>The Little Prince</p>	 <p>Twilight</p>	 <p>Twilight</p>

Ranking of most-read books, from the tested panel

# Ratings of reading, lower than watching series and films



■ Yes   ■ No   ■ I haven't even heard of it

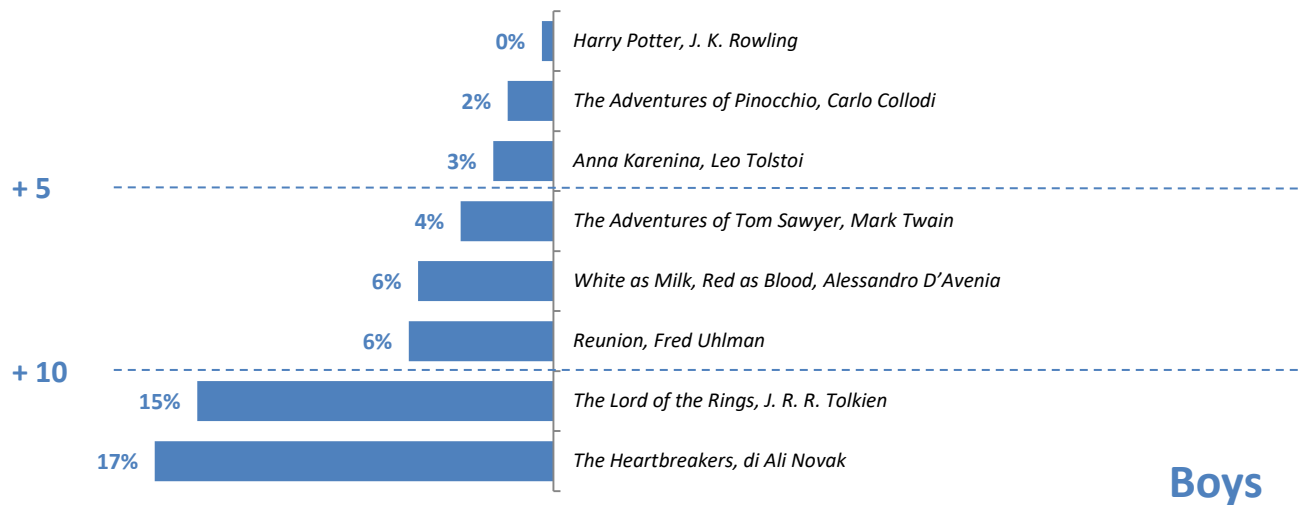
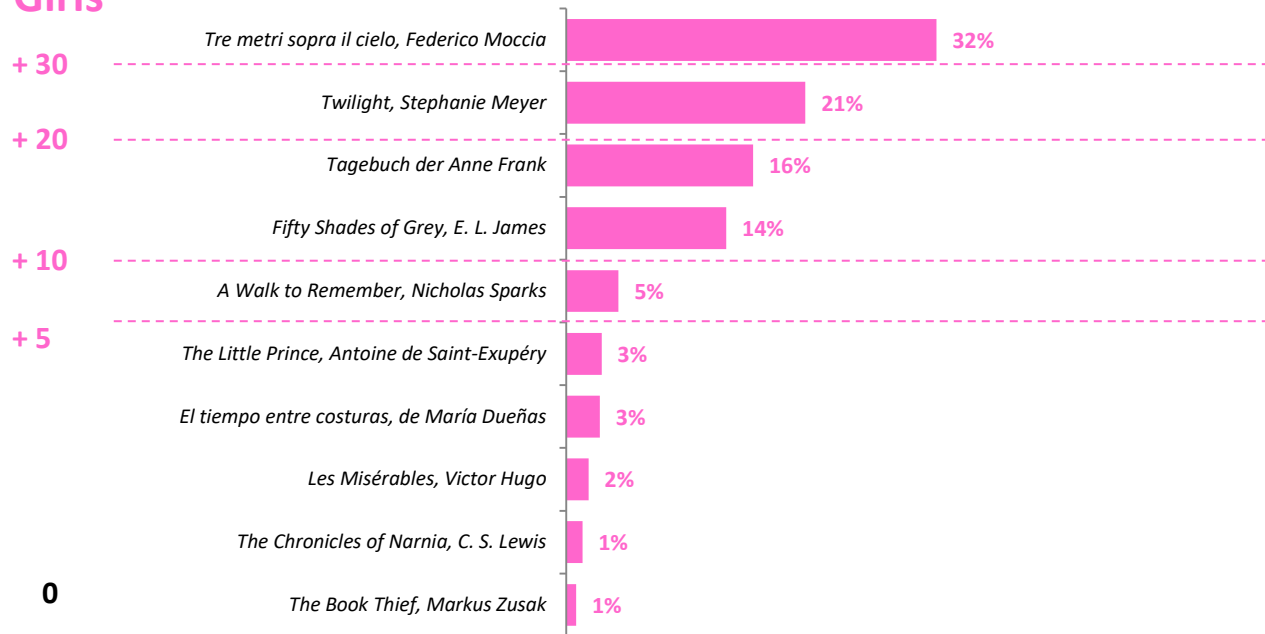


Have you read ...?

# From Twilight to The Lord of the Rings



## Girls



## Boys

- **GIRLS.** Same pattern as with movies and TV series. Love stories are the ones in which more difference in reading can be seen with boys. *Twilight* is the title displaying a further distance in reading with boys.
- **BOYS.** Action and Adventures books are the ones displaying a further distance in reading with girls. *The Lord of the Rings* is the title showing more distance in reading.
- With regards to the most-read books, no big differences arise, being *Harry Potter*, *The Little Prince* and *Narnia* stories appealing to both girls and boys.

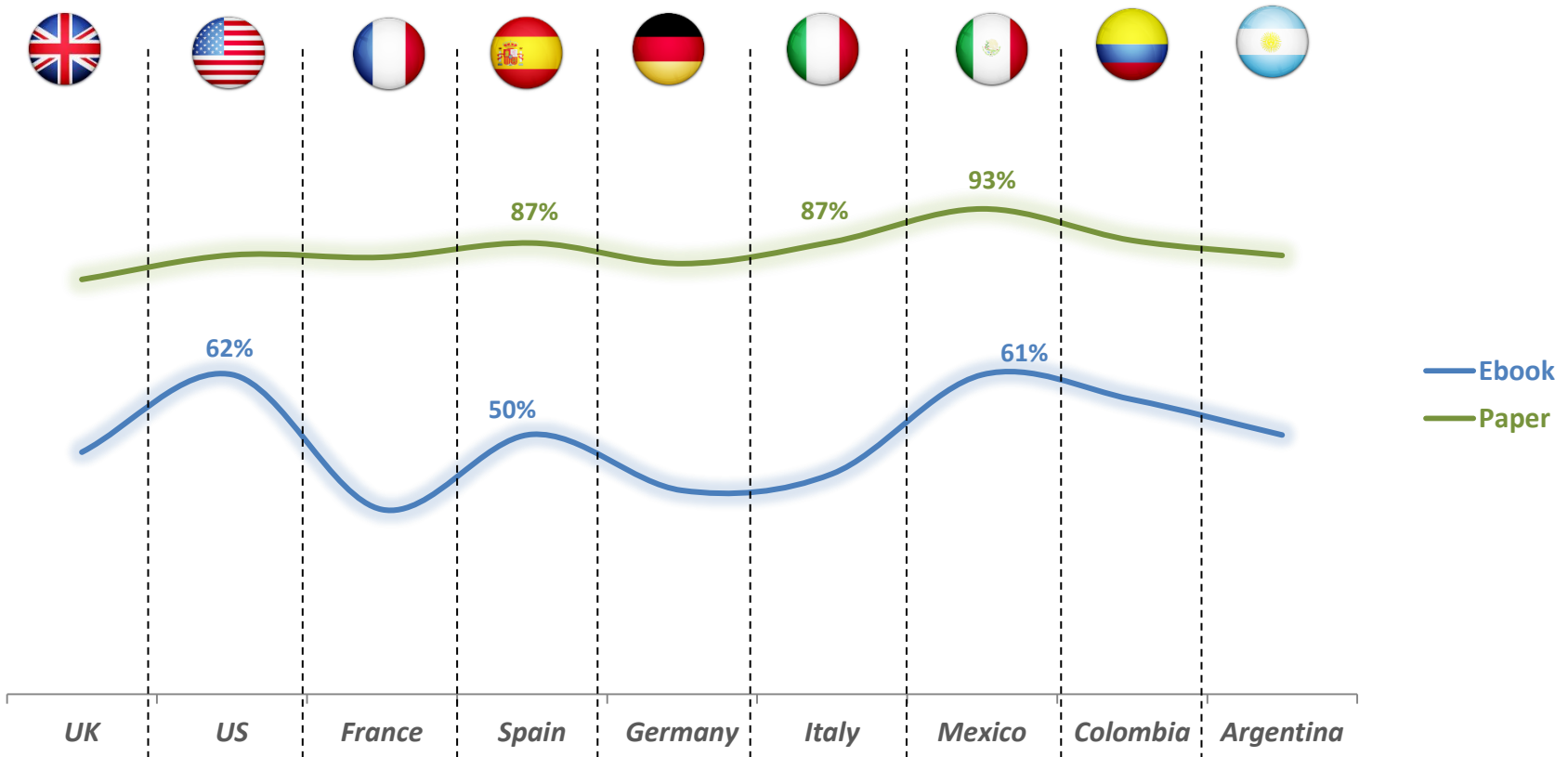
Graph: Difference of points of percentage of reading between boys and girls



# Paper-backed books, higher than *e-books*

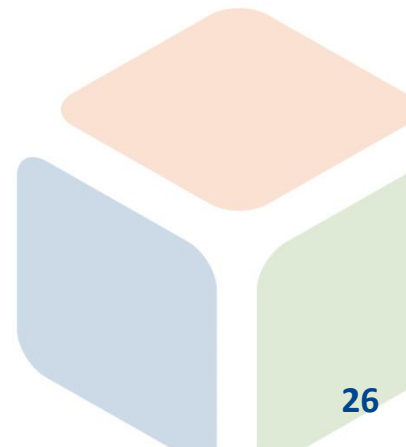


- The majority of the people who read at least one book per year on paper are from **Mexico, Italy** and **Spain**. Close to nine in ten youngsters from this countries read more than book per year.
- The **US, Spain** and **Mexico** are the countries where young people read more books on *e-book* per year. Conversely, **Germany** and **France** are the ones where young people read less on this format.



How many books do you read per year, in the following formats?  
(Only people who read at least a book per year)

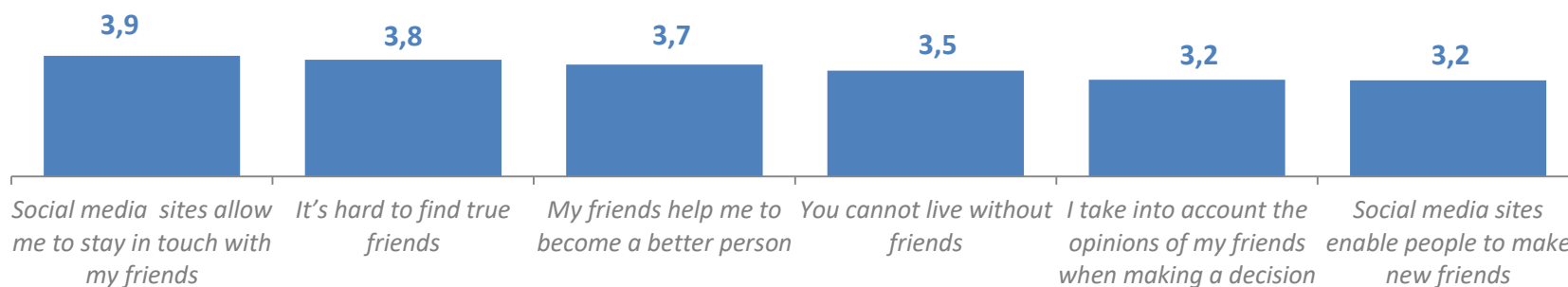
# Friendship, a treasured value by youths












# Strong values on friendship



- The film **The Intouchables**, the TV series **Friends** and **Harry Potter** books are the titles that best portray friendship, according to the majority of people who answered to that open-ended question.
- Youngsters feel it's hard to find true friends: 3,8 on a one to five scale, on average; something specially true for **Americans and Spaniards**, according to the results of the survey.
- Young people from **Spain and Germany** are the ones who agree to a higher degree that one cannot live without friends.
- **American** youngsters are the ones who take more into account the opinions of their friends when making a decision.



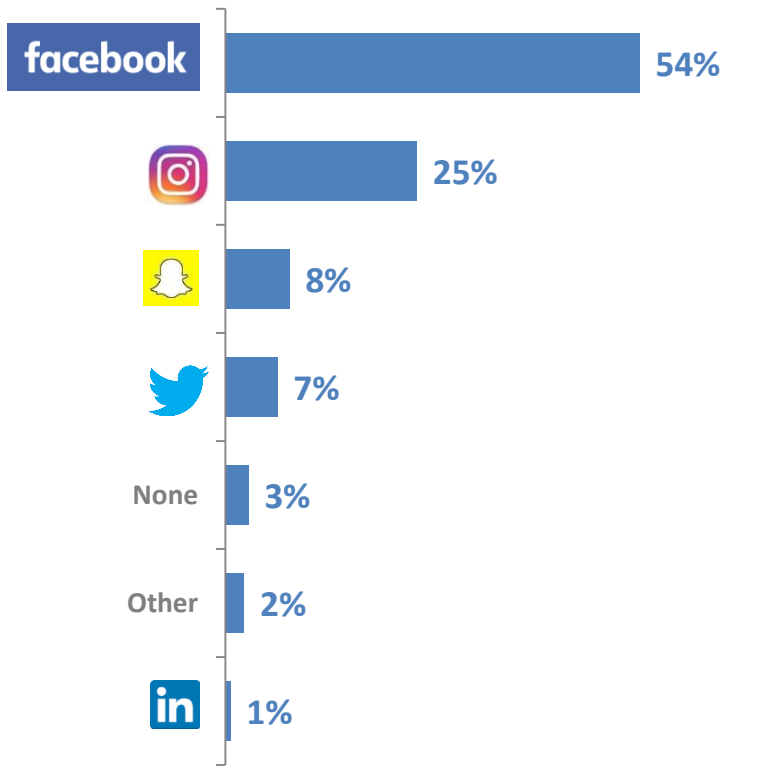
	 UK	 US	 FRA	 ESP	 DEU	 ITA	 MEX	 COL	 ARG
<i>Social media sites allow me to stay in touch with friends</i>	3,7	3,9	3,6	3,9	3,7	3,5	4,3	4,3	4,2
<i>It's hard to find true friends</i>	3,8	4,0	3,7	4,0	3,9	3,6	3,6	3,6	3,8
<i>My friends help me to become a better person</i>	3,5	3,8	3,3	3,6	3,6	3,6	3,6	3,5	3,7
<i>You cannot live without friends</i>	3,5	3,7	3,4	3,8	3,8	3,7	3,1	2,8	3,5
<i>I take into account the opinions of my friends when making a decision</i>	3,4	3,6	3,0	3,0	3,1	2,6	2,7	2,6	3,0
<i>Social media sites enable people to make new friends</i>	3,3	3,4	2,6	3,0	2,7	2,9	3,1	3,0	2,9

To what extent do you agree/disagree with the following statements about friendship? (1 Disagree-5 Agree)

# Facebook, the most-used social media network



- **Facebook** is the most-used social media network among young people, according to the survey. One in two acknowledge using it the most often. Mexico, Colombia and Argentina are the countries where young people use Facebook the most.
- **Instagram** comes in second. European countries such as Spain, Germany and Italy are the ones in which young people use this social network most often.
- The use of **Twitter** as the main social network is higher in Spain than in the rest of the countries, amounting to 15%.



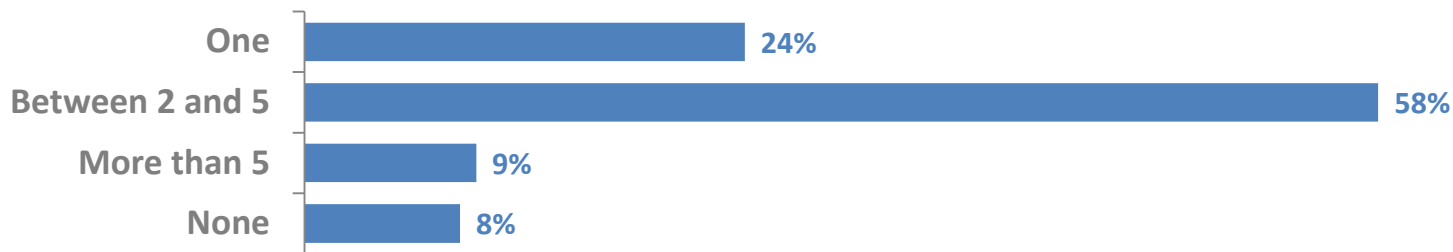
	facebook	Instagram	Snapchat	Twitter	None	Other	in
UK	49%	21%	11%	11%	4%	2%	1%
US	46%	25%	15%	9%	3%	1%	1%
FRA	53%	16%	16%	7%	4%	2%	1%
ESP	32%	46%	0%	15%	5%	2%	0%
DEU	49%	30%	7%	2%	6%	7%	0%
ITA	45%	46%	0%	1%	4%	2%	1%
MEX	78%	14%	0%	3%	0%	3%	0%
COL	68%	23%	0%	2%	1%	6%	0%
ARG	55%	32%	1%	7%	2%	4%	0%










Which social media sites do you use the most often?

# Youth and true friends



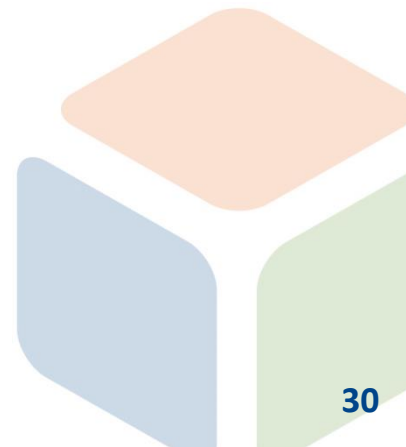
- Six out of ten (58%) young people have **between 2 and 5 friends**. All countries appear in this category above the 50% range, being Spain and Mexico the ones in the highest part of the spectrum, and the US, the UK and France, in the lowest.
- **The two Anglo-Saxon countries** are the ones reporting more young people saying they **only have one true friend**: 30% in the US and 27% in the UK.



	 UK	 USA	 FRA	 ESP	 DEU	 ITA	 MEX	 COL	 ARG
None	11%	10%	14%	5%	8%	11%	4%	7%	6%
One	27%	30%	18%	17%	25%	17%	18%	20%	19%
Between 2 and 5	54%	54%	54%	66%	61%	63%	66%	61%	62%
More than 5	7%	7%	14%	12%	6%	9%	13%	11%	12%

And how many “true friends” do you think you have? (Best friends that you share everything with)

How different Catholic youths are to the rest of the young people in terms of audiovisual preferences?





## Survey to Catholic youths



**Universe:** Catholic young people among 18 and 29 years old (who attended Krakow's 2016 WYD).



**Geographical range:** 47 countries: *Argentina, Australia, Austria, Belgium, Bosnia and Herzegovina, Brazil, Canada, Chile, Colombia, Costa Rica, Croatia, Dominican Republic, Ecuador, El Salvador, France, Germany, Guatemala, Honduras, Indonesia, Ireland, Italy, Lebanon, Macedonia, Malaysia, Malta, Mexico, New Zealand, Nicaragua, Netherlands, Panama, Paraguay, Philippines, Poland, Portugal, Romania, Saudi Arabia, Saint Lucia, Singapore, Slovenia, Spain, Sweden, Turkey, United Arab Emirates, United Kingdom, US, Uruguay, Venezuela.*



**Data-gathering process:** computer-assisted Web interviewing (CAWI) to a panel of youths, representative of the population of people from 18 to 29 years old of each country surveyed, conducted in the majority language of each country (English, French, German, Italian and Spanish).



**Sample size:** 737 interviews.



**Sampling error:**  $\pm 3.6\%$  for the whole sample ( $n=737$ ), for a 95.5% level of confidence (two sigmas) and in the most unfavorable hypothesis of  $P=Q=0.5$ , in the postulation of simple random sampling.



**Duration of the interview:** 12 – 15 minutes, approximately.



**Interviewing dates:** May and June, 2018.

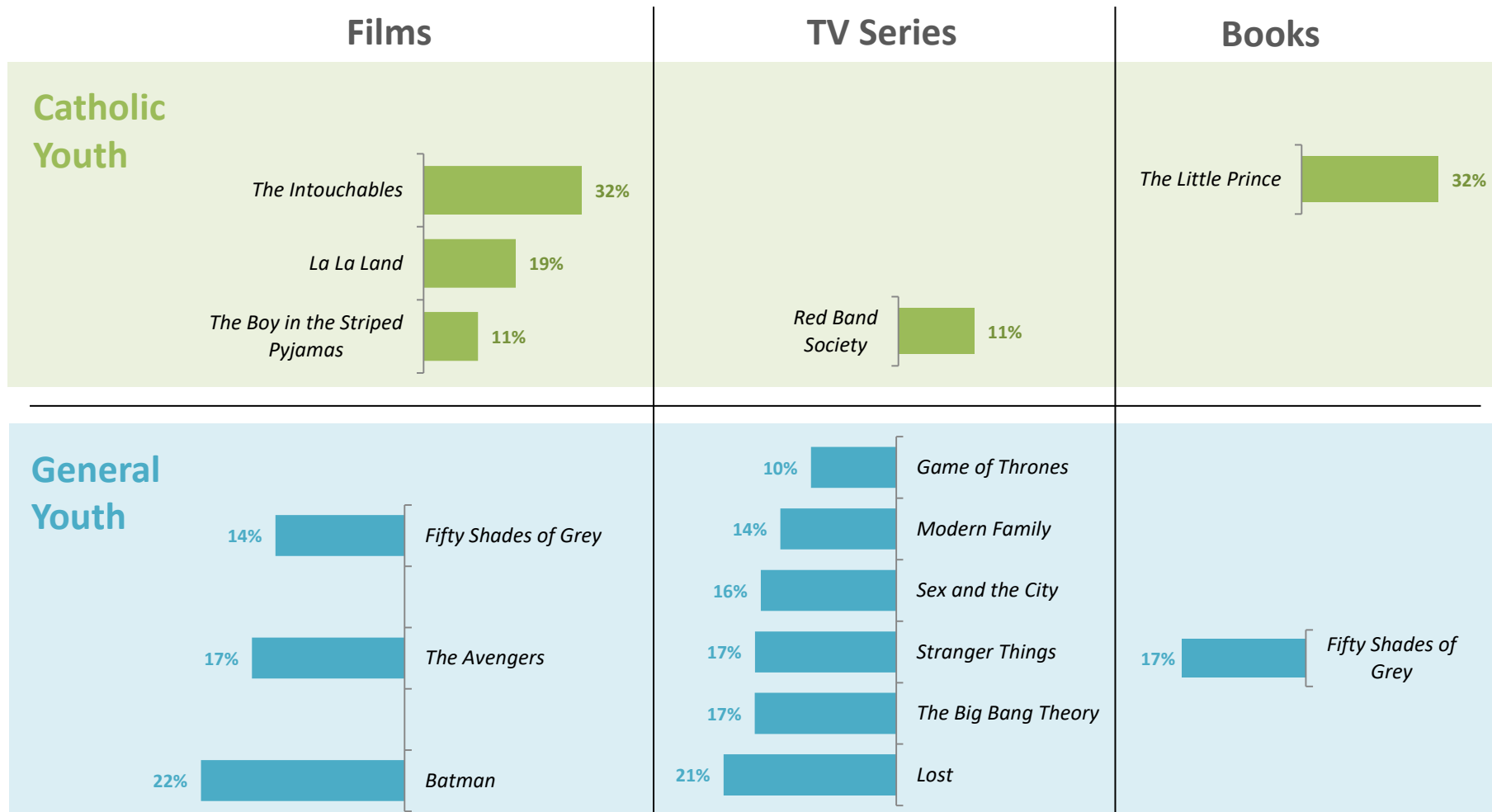


# Similar preferences



- Compared to the general population, Catholic youngsters show **similar attitudes and preferences** towards the main stories they prefer watching and reading. *Fifty Shades of Grey* is the only title coming up both on films and books showing bigger differences in reading and watching between the two studied groups of youths.

**Graph:** Difference of points of percentage of viewing & reading of the tested films, TV series and books between Catholic youths and young people from the general population (only depicted those titles having a more than 10 point difference)

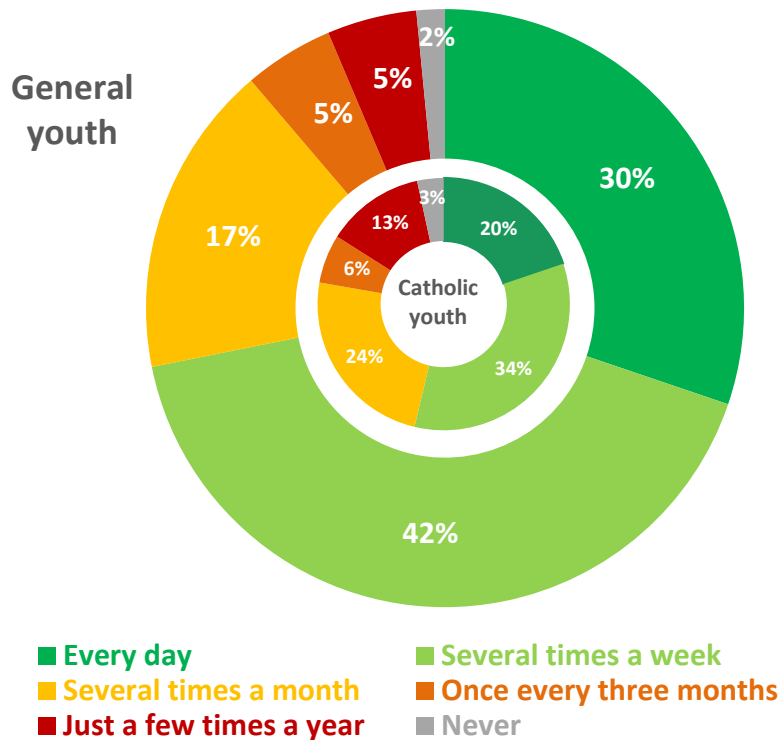




# Catholics watch movies and TV series less frequently



- Bigger differences between Catholic youngsters and youths from the general population arise when it comes to habits and other audiovisual choices.
- Chief among them is that **Catholics watch films and TV series less frequently** than young people in general. Rates of reading are very similar between Catholics and the rest.



How often do you watch series?



To what degree do you choose to watch a series via...?

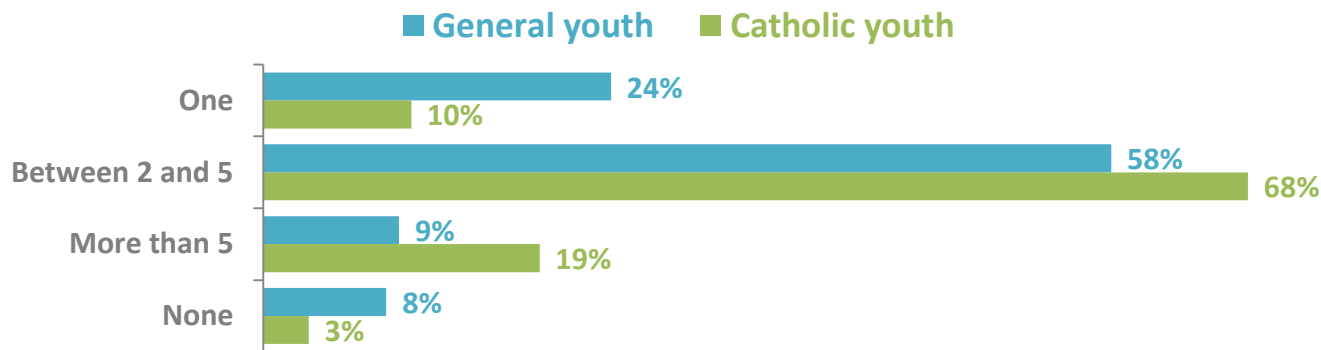
# Catholics have stronger values on friendship



- Regarding friendship, Catholic youngsters believe more than youths from the general population that their friends help them to **become a better person**. They also show higher accordance with the idea that one cannot live without friends.
- **Catholic youths also score higher when it comes to counting true friends**. The majority (68%) report having between 2 and 5 friends, ten points higher than youngsters from the General Population.
- Another gap of ten points can also be found among respondents who answered having more than five true friends.



*To what extent do you agree/disagree with the following statements about friendship? (1 Disagree-5 Agree)*



*And how many "true friends" do you think you have? (Best friends that you share everything with)*



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