



Innovation and Transformation Summit: Localisation

Subs, Dubs? What does the Consumer Think?



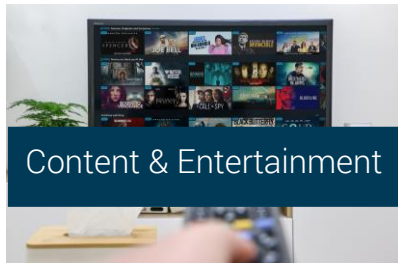
February 2023
James Duvall



Futuresource Consulting is a market research consulting company that provides a range of specialist intelligence reports and ongoing personal debriefs to support with business decision-making. We pride ourselves on delivering fact-based insights and market forecasts on a global scale – advising on strategic positioning, identifying key trends, analysing competitors, and underpinning major technological developments.



Consumer Electronics



Content & Entertainment



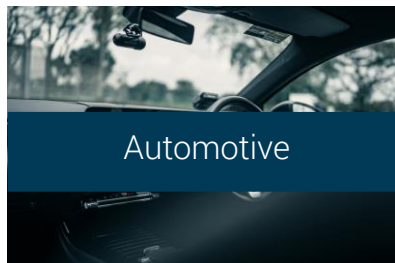
Enterprise & Pro AV



Education Technology



Professional Broadcast



Automotive

OUR EXPERTISE

- | Full service end-to-end research capabilities
- | Global market coverage based on informed local expertise
- | Delivering excellence for over 30 years
- | Leading-edge data delivery and analysis
- | Unrivalled client list, maintained through client-centred service approach



Cost of Living



COST OF LIVING CONTINUES TO BITE IN MOST COUNTRIES

% of Total Respondents who say they are 'Somewhat' or 'Significantly' Worse off Compared to 6 months ago
Base: All Respondents



Total Struggling	47%	50%	55%	44%	40%	53%	56%
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Q. Do you feel you are financially better or worse off now, compared to 6 months ago?
 Q. Please describe your current financial situation: Unable to afford my bills and everyday essentials / Just managing to pay bills and everyday essentials

ALL CATEGORIES, SEE INCREASE IN NET NEGATIVE SPEND

Net Difference between those who say they have spent more vs spent less amongst all respondents

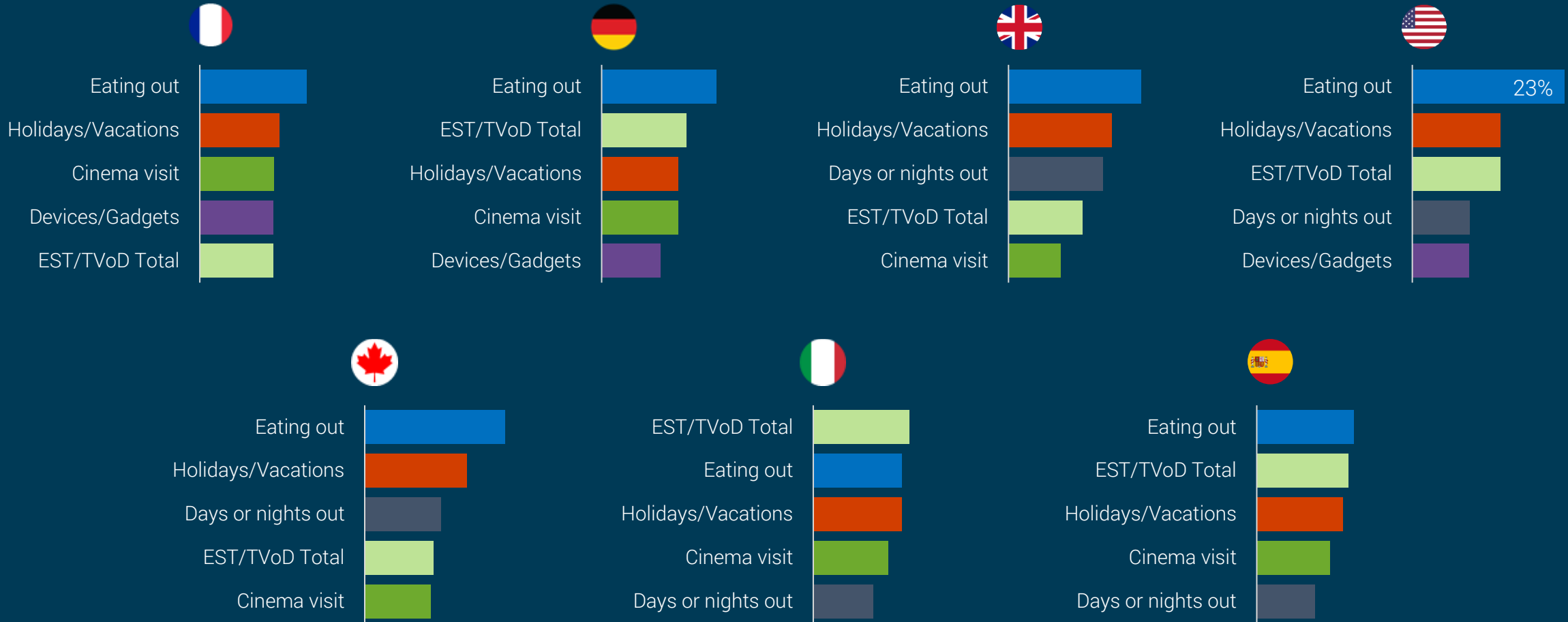
	France	Germany	UK	USA	Canada	Italy	Spain		Total LWD25	Total LWD24
Eating out	-38%	-24%	-57%	-22%	-33%	-36%	-31%		-34%	-30%
Days or nights out	-37%	-21%	-54%	-20%	-34%	-35%	-30%		-33%	-29%
Cinema	-34%	-23%	-43%	-14%	-29%	-41%	-38%		-32%	-30%
Electronics devices and gadgets	-34%	-18%	-45%	-14%	-25%	-33%	-31%		-29%	-26%
Holidays/Vacations	-31%	-15%	-47%	-16%	-28%	-31%	-29%		-28%	-24%
Books	-26%	-17%	-36%	-11%	-20%	-25%	-26%		-23%	-22%
Music	-24%	-15%	-33%	-7%	-17%	-28%	-26%		-21%	-19%
DVD/Blu-ray	-18%	-16%	-29%	-13%	-17%	-27%	-24%		-21%	-20%
PVoD/PEST	-18%	-14%	-29%	-8%	-16%	-28%	-23%		-19%	-18%
EST	-16%	-14%	-29%	-7%	-16%	-28%	-20%		-19%	-18%
Video Games	-20%	-10%	-30%	-5%	-15%	-26%	-22%		-18%	-17%
TVoD	-16%	-13%	-26%	-9%	-15%	-25%	-19%		-18%	-16%
SVoD	-16%	-12%	-33%	-5%	-14%	-18%	-16%		-16%	-14%
Pay-TV Subscriptions	-16%	-11%	-31%	-5%	-14%	-19%	-13%		-16%	-13%

Q. Please describe how your spending on the following products has changed so far this year compared to last year:

SHORT TERM OUTLOOK IMPACTING OUT-OF-HOME SPEND

Activity/Product Respondents Most Likely Stop/Reduce Spending on in H1 '23

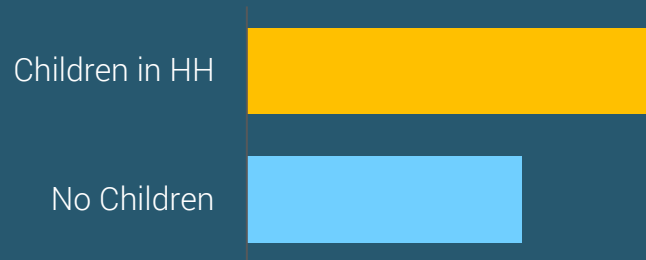
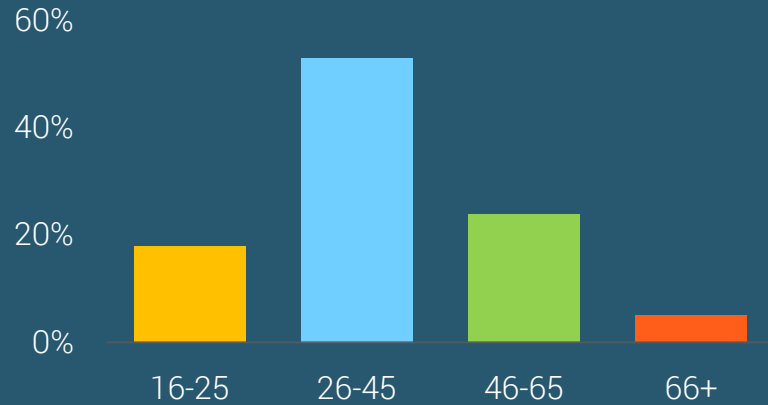
Base: Active on any of these products/ services in the last 12M



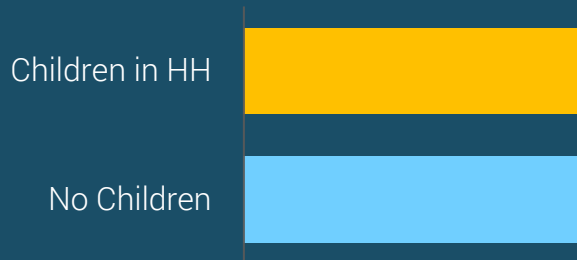
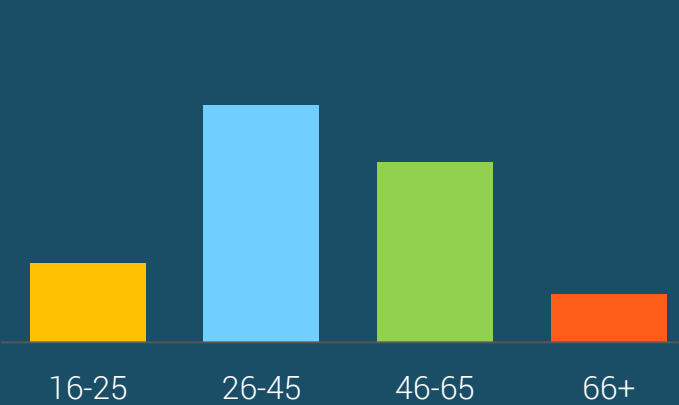
Q. Which of the following products are you most likely to decrease your spending on, or stop altogether, over the next 6 months?
 EST/TVoD Total, includes Premium transactions

CUSTOMER BY PRODUCT CATEGORY

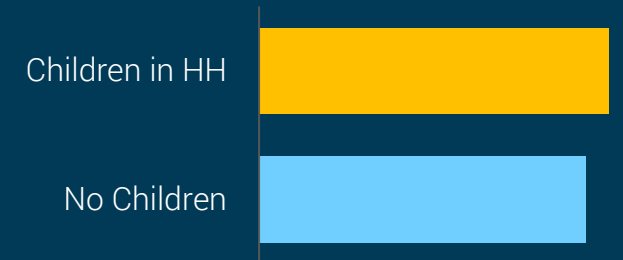
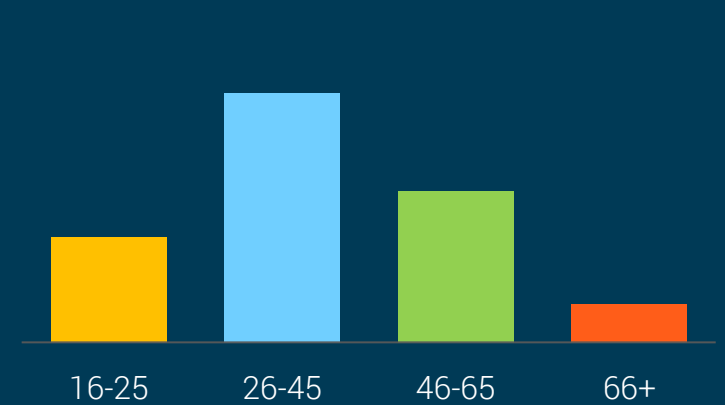
DIGITAL TRANSACTIONS



SUBSCRIPTION



AVoD / FAST





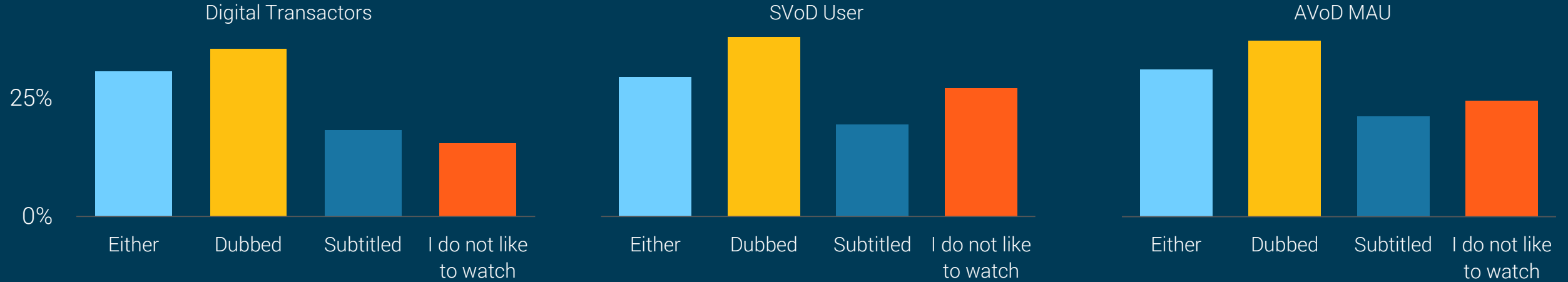
Subs, Dubs? What does the Consumer Think?



TWO-THIRDS VIEWERS HAPPY WITH DUB OR SUB FOREIGN CONTENT

% Respondent Preferences for Viewing Foreign Movies or TV Shows – by Product Category

Base: All Respondents



% of Respondents who do not like to view Dubbed or Subtitled Foreign Movies or TV Shows

Base: All Respondents



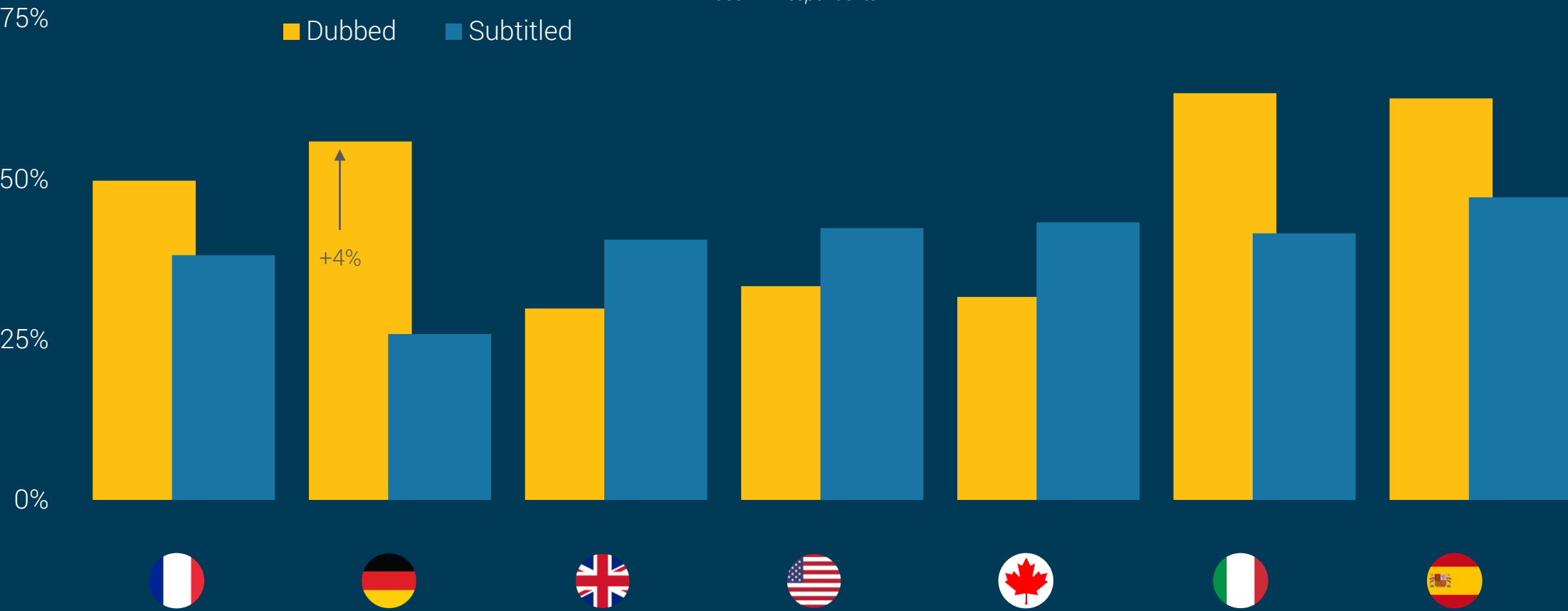
Q. Do you prefer to watch foreign movies or TV shows if they are dubbed, or if they are subtitled?

DUBBING OF GREATER FOCUS THAN SUBTITLED CONTENT

↑ vs. LWD24
Summer
2022

% of Total Respondents Saying That Dubbing or Subtitling is Important or Very Important

Base: All Respondents

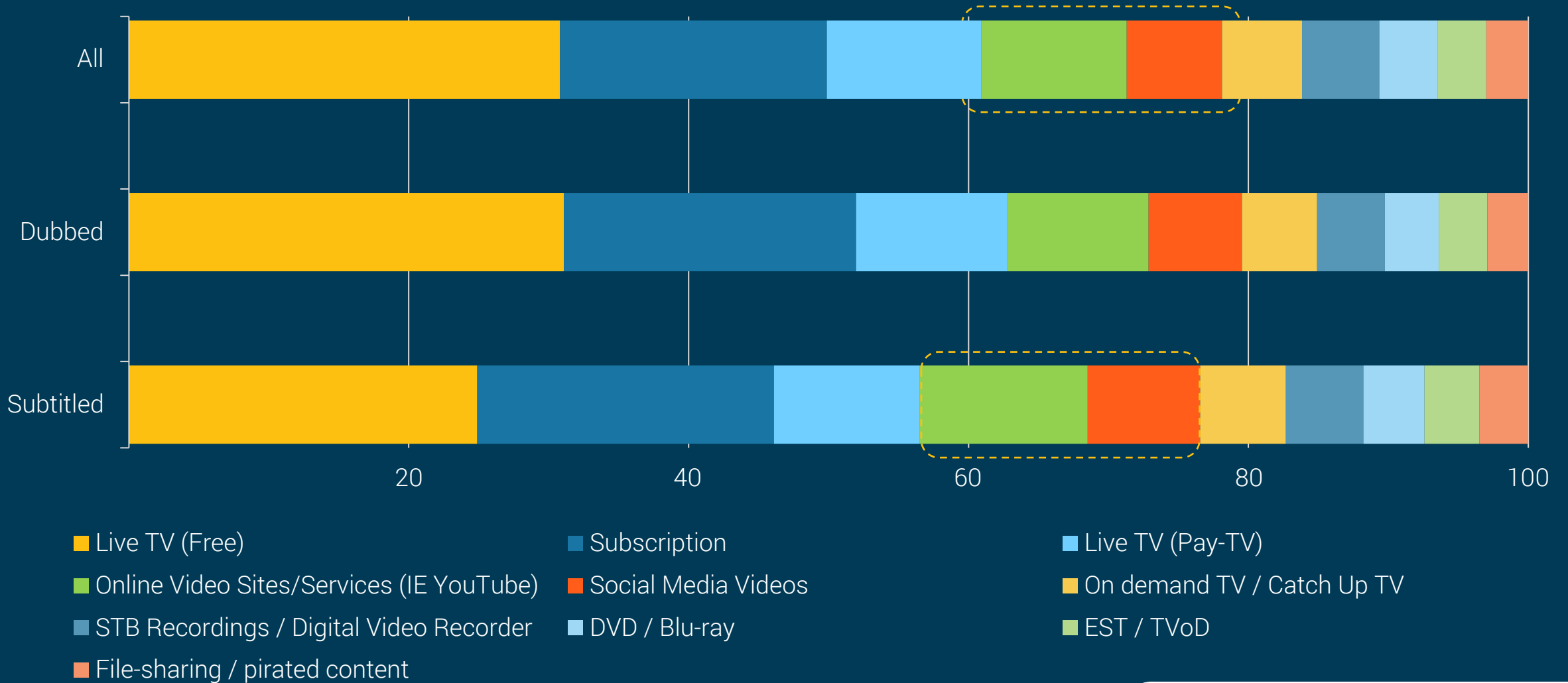


Q. How important are dubbing and subtitles when watching movies or TV shows on streamed subscription services? Please rate where 1 is not important at all and 5 is very important

AUDIENCES FOR DUBBED FOLLOW MORE TRADITIONAL PROFILES

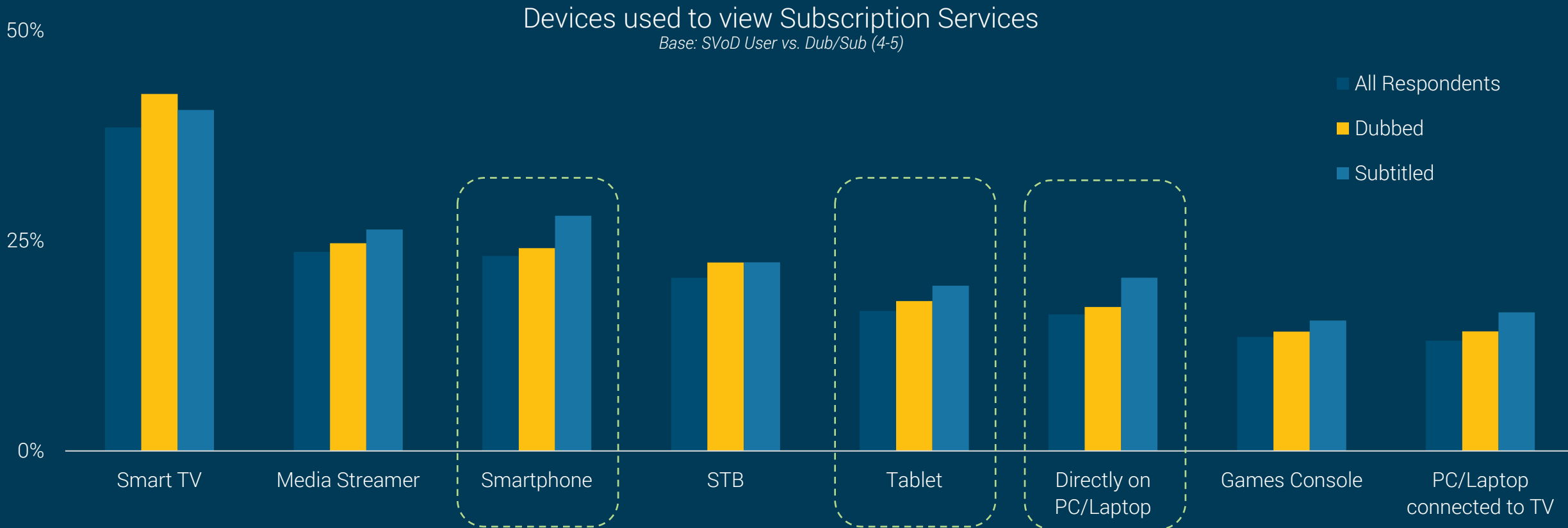
100 Hours of Typical Viewing Behaviour split by Type

Base: All Respondents, Dub/Sub (4-5)



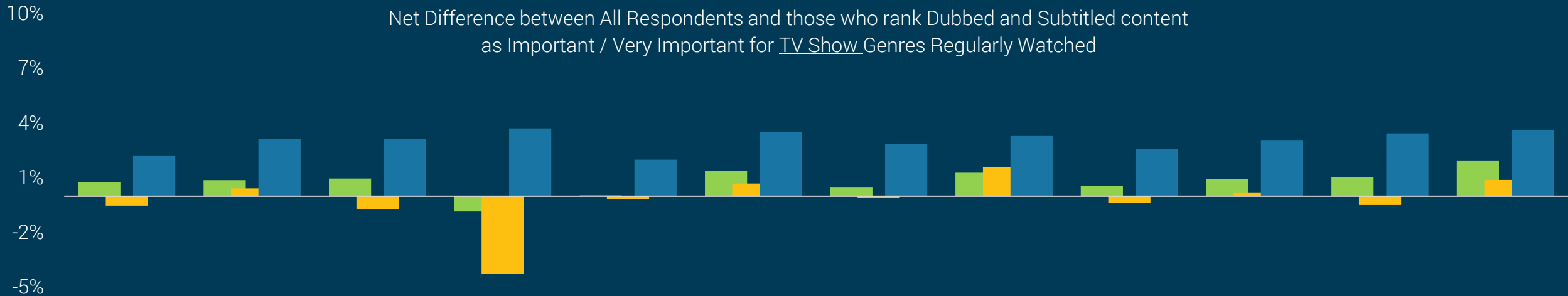
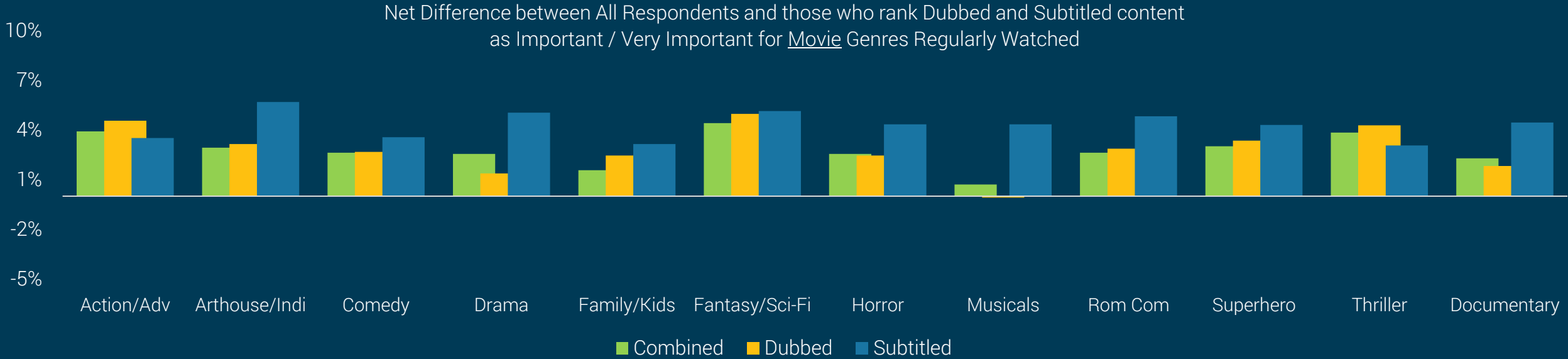
Q. Now thinking about your own personal typical viewing behaviour, we'd like you to imagine 100 hours of viewing and to divide it up amongst each of these options to represent your typical viewing

A WIDER VARIETY OF DEVICES IS KEY FOR THE SUB & DUB VIEWER

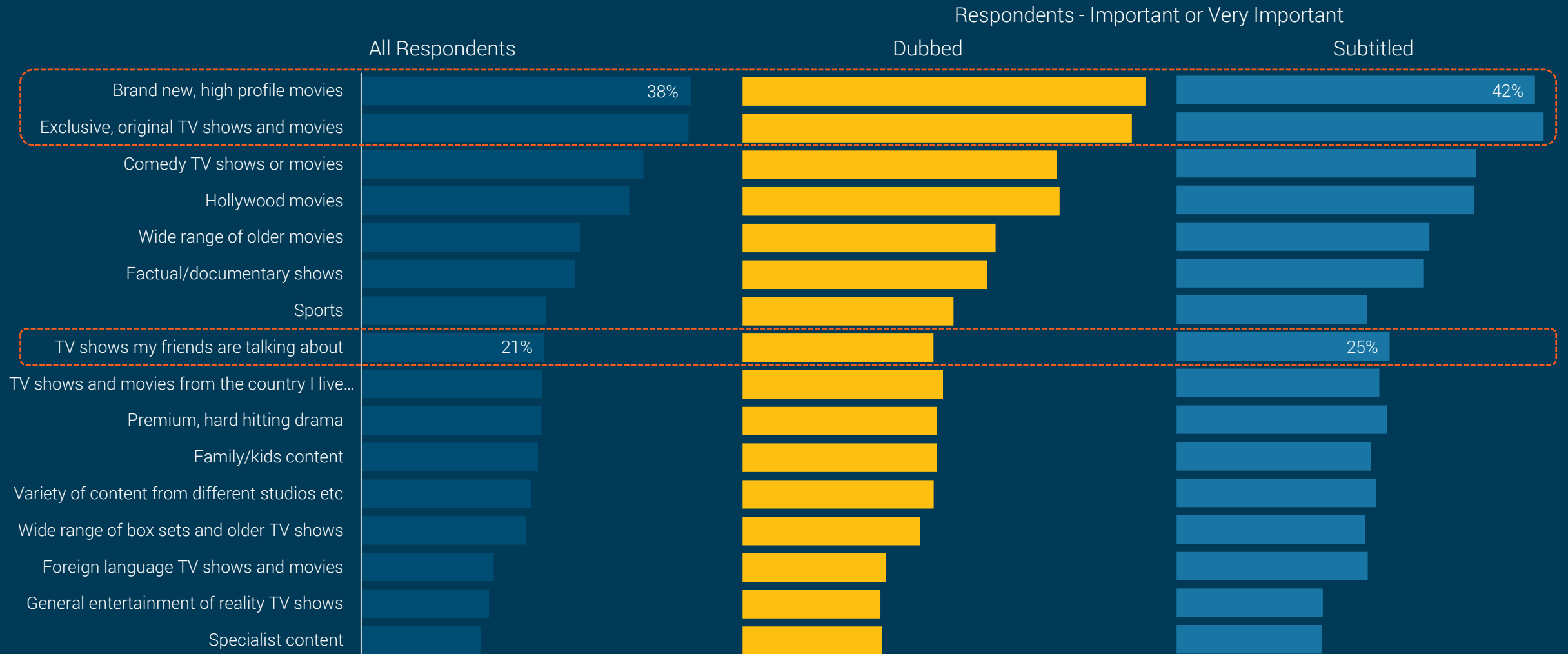


Viewing situation a likely influence on device usage for those ranking Subtitles as important

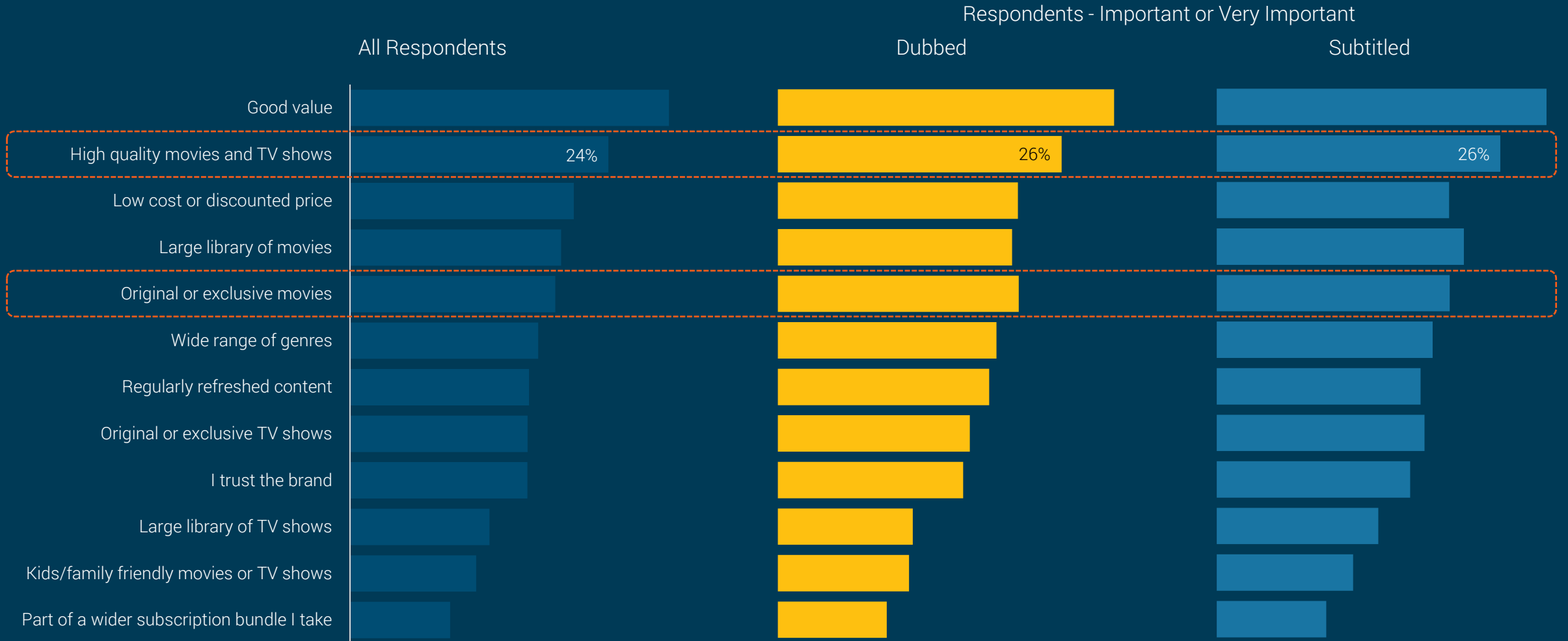
SUBTITLED CONTENT STRONGER ACROSS SHORT FORM CONTENT



What Content Encourages SVoD Users to Subscribe to Streaming Services



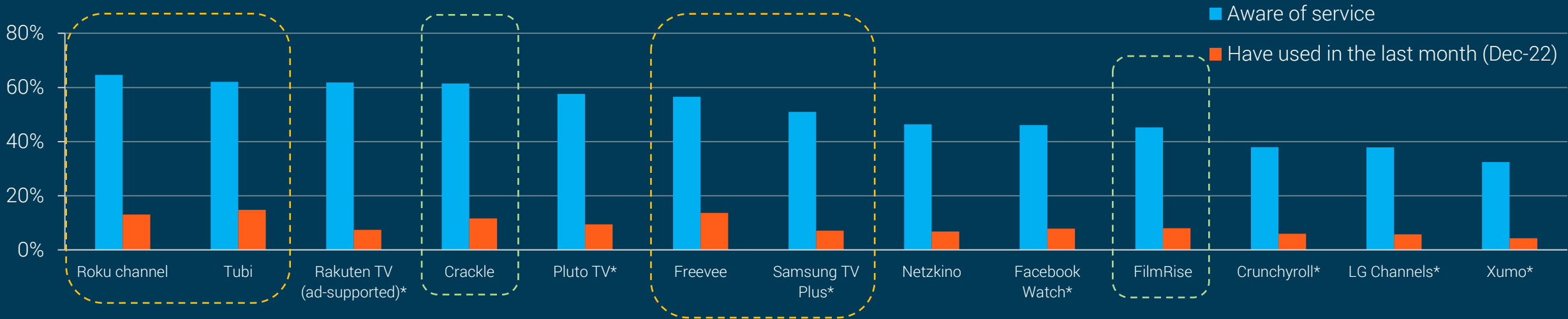
What Encourages SVoD Users to continue their Subscriptions



AVoD AND FAST – AWARENESS HIGH, USAGE YET TO TAKE OFF

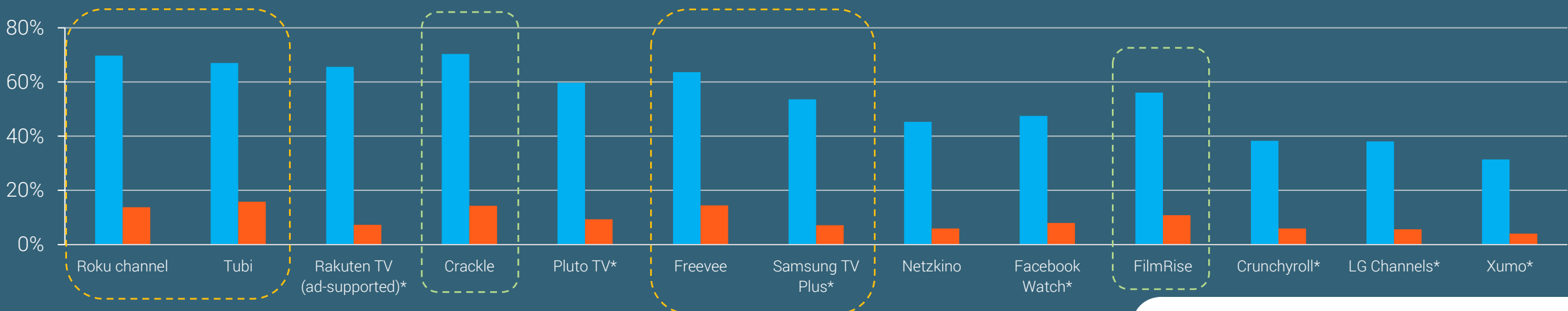
Awareness of AVoD Services and Monthly Usage

Base: All Respondents



Awareness of AVoD Services and Monthly Usage – by Dubbed and Subtitled Importance

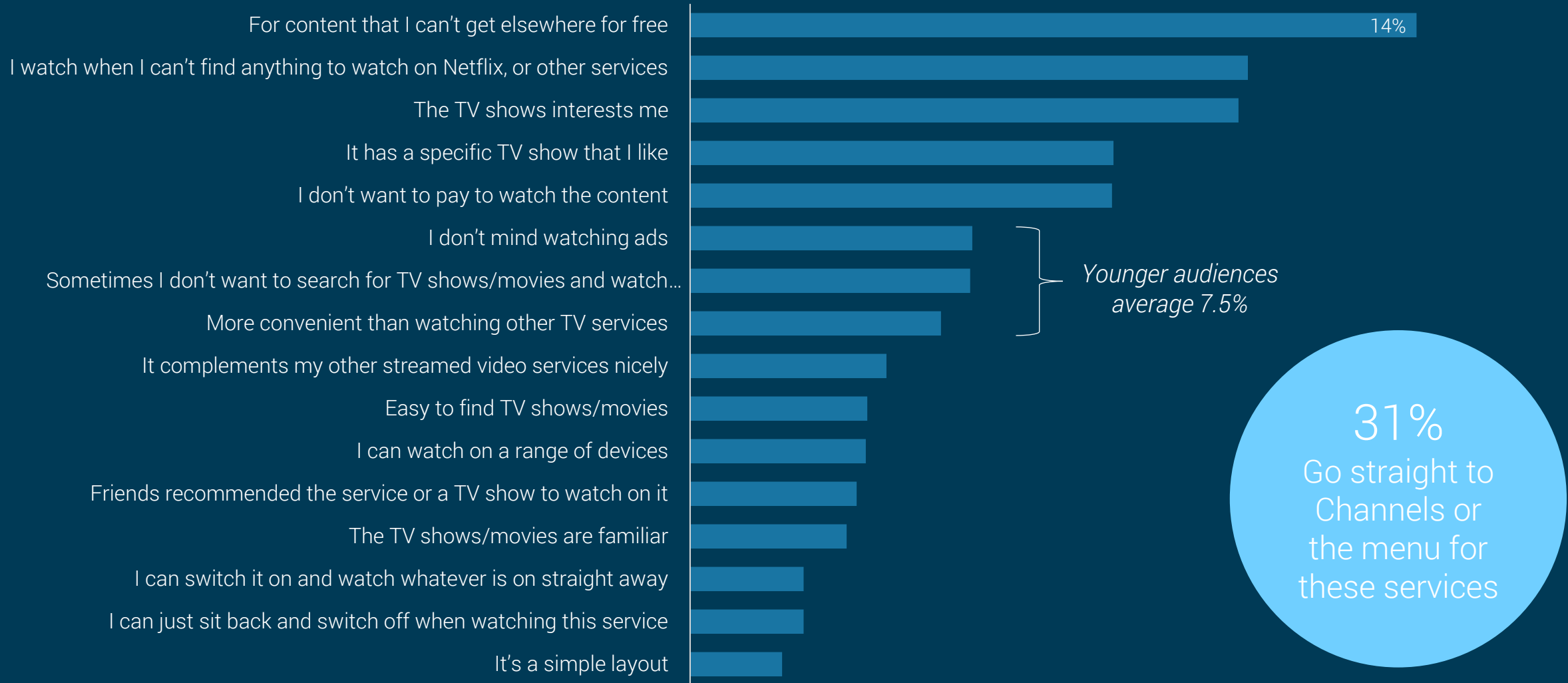
Base: Respondents ranking Dubbed and Subtitled content as Important and Very Important



Q. Have you heard of the following services?
* Services available in 5-7 of the Countries surveyed

Why Do You Use AVoD Services? Only 1 response selected

Base: Last month AVoD service users



Q. Why or when do you use these services

Q. When you watch these services, what do you usually do first or before

- | Cost of Living continues to bite, but entertainment remains an important fixture in everyday life
- | It's a split – DUBBED content preferred in non-English language countries, whilst UK, US and Canada the preference is SUBTITLED
- | SUBTITLED content most important across genres for TV Shows
- | Importance of DUBBED and SUBTITLED content can play a role in increasing subscriptions
- | Third of AVoD Users go straight to these services first, but could pull of DUBBED or SUBTITLED content be used to increase frequency

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Its insight and global market coverage are based on informed regional expertise, ensuring its portfolio of world-class clients is fully supported in research, analysis, strategic planning and decision making.

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