European Commission

STUDY ON AUDIENCES, CONSUMER BEHAVIOUR AND PREFERENCES RELATING TO THE CONSUMPTION OF MEDIA CONTENT

Final report

Additional material on this survey, including socioeconomic and geographical splits of the answers can be accessed at: https://digital-strategy.ec.europa.eu/en/news-redirect/893309

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DIRECTORATE-GENERAL FOR COMMUNICATIONS NETWORKS, CONTENT AND TECHNOLOGY

Media Policy

Audiovisual Industry and Media Support Programmes

Study on audiences, consumer behaviour and preferences relating to the consumption of media content

Final Report

Submitted by Open Evidence, London School of Economics, KEA and CINT

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Executive Summary

This report outlines the findings of a study conducted by Open Evidence in collaboration with the London School of Economics, KEA European Affairs, and CINT. The study examines trends, behaviours, and preferences in media consumption across the European Union to support the European Commission’s Media Industry Outlook. The analysis covers five core areas: overall media consumption, audiovisual entertainment, news, video gaming, and emerging technologies.

The findings are based on a comprehensive survey conducted across all 27 EU Member States, gathering data from 55,746 respondents using an online questionnaire designed to capture diverse media behaviours and preferences. The survey targeted the general population aged 18 and above, ensuring representativeness across demographics such as age, gender, education, and income. It included 122 questions divided into the five core areas. Respondents were randomly assigned to address different thematic blocks to reduce response fatigue while maintaining robust coverage of key topics. The methodology incorporated statistical techniques, such as MaxDiff analysis and vignette-based experiments, to explore consumer motivations, preferences, and behaviours. The dataset was weighted to reflect the population distribution across Member States and ensure accurate EU-wide insights.

The findings highlight that media consumption is universal across the population, with nearly all respondents engaging with some form of media regularly. Social media, news, and music dominate daily routines, with social media being the most frequented medium. Despite this, traditional TV continues to hold a significant place in consumers' lives. More than replacing traditional media, the growing popularity of digital platforms reflects a broadening of media engagement.

Audiovisual content consumption shows significant patterns across the EU. While traditional TV remains a key medium, its usage is evolving with the rise of on-demand viewing, including through subscription-based services. Premium channels and platforms offering specialised content, such as sports and films, are growing in popularity, reflecting changing consumer preferences. Meanwhile, online services provided by traditional TV channels face challenges in awareness and content appeal, underscoring the competitive pressure from global streaming platforms. These trends highlight a dynamic and increasingly digitalised audiovisual landscape.

In the **news sector**, professional sources are generally trusted, reflecting their ongoing importance. However, disinformation and challenges from social media platforms threaten the credibility of news consumption. Traditional TV remains the dominant channel for accessing news content, although online platforms are increasingly popular. Despite their wide reach, social media and user-generated content face lower trust levels compared to professional outlets. More specifically, the findings clearly show that respondents with a more positive view of news also rely on news from professional sources, while those who distrust news content rely more on social media and other non-professional platforms.

Video gaming is increasingly popular, particularly among younger demographics, and continues to evolve with innovations such as cloud gaming and extended reality technologies. Many respondents engage with gaming regularly, signalling its growing cultural and economic significance. The survey results indicate that mobile games or apps on smartphones or tablets have seen the most significant increase in player engagement over the past 12 months. Moreover, the results also highlight the rising influence of e-sports and immersive virtual environments on the entertainment landscape.

The influence of **emerging technologies**, such as artificial intelligence, virtual and augmented reality, and smart devices, is reshaping how audiences interact with media. These innovations offer new opportunities for content creation and consumer engagement, but questions remain as regards the extent to which users are embracing technologies such as VPN, VR and AR and personalising their devices. Additionally, while AI is becoming more prevalent, it is not universally perceived as a major threat, with many users focusing instead on its practical benefits and potential for enhancing everyday experiences.

The study also reveals distinct consumption patterns across demographic groups. Younger audiences prefer digital platforms, including streaming and gaming, while older demographics tend to rely on traditional TV and news. Economic factors also play a role, with financially comfortable households more likely to invest in premium services and digital media. Families with children exhibit higher spending across all media categories, particularly on gaming and bundled service packages.

Despite these trends, challenges persist. Media providers must ensure the diversity and relevance of their content to address the wide-ranging interests of audiences and effectively communicate with the audiences about it. The integration of emerging technologies, such as AI and extended reality, offers opportunities to innovate and engage consumers more effectively. Results point towards several critical issues such as equitable access to digital media, countering disinformation, and sustaining high-quality journalism to uphold cultural and democratic values.

Introduction

This report presents the findings of the "**Study on Audiences, Consumer Behaviour, and Preferences Relating to the Consumption of Media Content**", commissioned by the European Commission's Directorate General for Communications Networks, Content and Technology (DG CONNECT). The study's primary objective is to support the Commission in preparing the second edition of the European Media Industry Outlook. As outlined in the Media Action Plan, the Media Industry Outlook examines market and technological trends across key media sectors to enhance the Commission's knowledge base and inform future policy decisions.

The present study contributes by gathering primary data on demand-side trends in media markets, focusing on EU consumers' habits, preferences, and motivations regarding media consumption. While this survey takes an exploratory approach, covering various market segments, it also makes comparisons with data from the first edition of the European Media Industry Outlook. This allows for an analysis of ongoing trends and offers valuable insights into future developments in the media landscape.

The study focuses on five key sub-sectors of media consumption:

1. **Overall/Aggregated Consumption Trends in Media**: This will explore broader media consumption patterns, identifying both overarching trends and internal substitution effects within the competitive attention economy.
2. **Audiovisual Entertainment Content**: The survey will delve into EU consumers' behaviours, preferences, and motivations concerning professionally produced audiovisual content, such as films and series. The aim is to understand the drivers of content discovery and selection, as well as evolving consumption patterns.
3. **News Content Consumption**: The survey will examine how EU consumers access and engage with news content, capturing their habits, preferences, and behaviours in this critical area of media consumption.
4. **Video Gaming**: With the rise of immersive technologies, this sub-chapter will investigate how consumers engage with video gaming and extended reality content, offering insights into the growing role of virtual environments in entertainment.
5. **Technology and Innovation Trends**: This analysis will explore the influence of emerging technologies on media consumption, including AI, VR/XR, user-generated content, VPN usage, data exchange, and smart TVs, while assessing their impact on intellectual property and consumer behaviour in an evolving digital landscape.

This study aims to assess current trends and provide insights into the future of media consumption in the EU.

The report describes the methodology used for the study (chapter 1), gives a detailed overview of the study results (chapter 2) and provides a description of selected profiles of EU consumers (chapter 3).

Study background

The digital transformation has drastically reshaped media consumption, not only by increasing the abundance of **audiovisual (AV) content** available to consumers but also by fundamentally altering how they access, engage with, and experience it. Video-on-demand (VoD) and streaming services have become major forces in the audiovisual landscape, shifting from traditional TV and cinema to more flexible, on-demand viewing experiences. Consumers now have unparalleled access to a wide range of films, series, and documentaries, transforming how content is discovered and consumed.

Overall, the European media industry, which spans audiovisual, news, and gaming sectors, is increasingly moving online. While this transition enhances its entertainment, cultural, and informational value, the industry faces stiff competition for **user attention, between professional sectors and other digital sectors**, which often monetise consumer engagement in ways that do not offer the same societal benefits. Professional media content now competes with sectors that may align less with public interests, highlighting the importance of sustaining quality content that contributes to culture and democracy.

Video gaming has emerged as a rapidly growing and dominant force within the leisure and cultural industries. Gaming has undergone significant changes, particularly with the rise of mobile gaming, and is expected to evolve further through innovations like cloud gaming and extended reality (XR) technologies.

The **news media sector** faces its own challenges, including the rise of disinformation, image manipulation, and growing media convergence, which risks blurring boundaries between news and entertainment and diluting journalistic standards in the pursuit of wider audiences. These issues are compounded by the economic fallout from the COVID-19 pandemic, which has placed additional financial pressure on the industry. Despite these challenges, news media remains a crucial pillar of democratic societies, acting as a watchdog and providing essential information that enables citizens to participate in public life.

Finally, **technology and innovation trends** are reshaping all media sectors, from audiovisual entertainment to gaming and news. The integration of artificial intelligence (AI), extended reality (XR), and the proliferation of user-generated content are all contributing to changes in how consumers interact with media. These technologies also bring intellectual property and data privacy challenges, which will become increasingly critical as media consumption moves further into the digital realm.

This report will investigate several aspects of these trends, which can be summarised in the following broader study questions:

1. **Overall consumption trends (RQ1):** How do sociodemographic factors shape media consumption profiles, expenditure, and preferences across different media types, and what are the emerging trends and substitution effects in an evolving media landscape?
2. **Audiovisual Entertainment (RQ2):** How do emerging trends, technological advancements, and demographic factors influence the consumption, and competitiveness of audiovisual (AV) content in Europe, and what are the implications for traditional and digital media platforms?
3. **News Content (RQ3)**: How do trust, branding, and the perception of news value influence consumption patterns, monetisation, and demographic profiles across different types of news content?

4. **Video Gaming (RQ4)**: How do demographic factors, concerns, and motivations influence gaming behaviours, perceptions, and consumption patterns, and what are the implications for the gaming and e-sports sectors?
5. **Technology and Innovation (RQ5)**: How do openness to immersive technologies like AR/VR and other emerging technologies (e.g., Smart TVs, AI) intersect with consumers' knowledge, price sensitivity, and accessibility concerns, and what are the demographic and consumption profiles of the most engaged users?

In Annex II, the research questions addressed in this study are presented.

1. Methodological approach

The survey is designed to thoroughly address all the research questions relevant to collecting comprehensive audience data across 27 EU Member States on five key areas: (i) Overall trends, (ii) News content, (iii) Video gaming and extended reality content, (iv) Audiovisual entertainment content and (v) Technology and innovation trends in media consumption.

To manage the survey's length (122 questions in total) and prevent survey fatigue while ensuring a comprehensive understanding of each topic, the overall sample was divided into two distinct groups. Each group received a different version of the survey: both versions included a general section about demographics and overall trends, followed by questions focused on two key areas, randomly selected from four possible ones. This approach allowed for the inclusion of a substantial number of questions and a thorough examination of each topic while maintaining a survey duration of no more than 20 minutes. This time constraint was used as survey quality may decline beyond this point due to participants' fatigue and reduced attention.

To address the research objectives effectively, the questionnaire design incorporates a strategy aimed at providing:

- **Longitudinal Insight:** 3 questions from the previous "Consumer Survey on Consumer Behaviour and Preferences Related to the Consumption of Audiovisual Entertainment Content" (European Commission, 2023) were exactly replicated in this new survey and 7 were not identical but still comparable. This allows for tracking changes in consumer behaviour and content preferences over time in the original 15 Member States where the previous survey on Audiovisual content was conducted. Additionally, the new survey has been expanded to include all 27 Member States, providing a more comprehensive understanding of consumer behaviour across the European Union. Finally, 3 questions of the present survey were similar to questions of the previous survey, but not enough to be compared with previous results. Please see Annex III. Table for comparison of previous Consumer Survey and present Survey for additional details on the questions.
- **Granular Insight:** to capture the diversification in media consumption, the survey's questions focus on different content genres and formats across the five key areas. Moreover, to ensure the clarity and relevance of questions, the questionnaire includes country-specific examples of media platforms and services. This customisation ensures that respondents can accurately identify the services or content under discussion.
- **Unbiased Questioning:** to maintain the survey's integrity and objectivity, question phrasings do not lead respondents in any particular direction, ensuring that responses reflect genuine audience insights without external influence. In practice, this means that when respondents engaged with survey questions, their responses were entirely shaped by their own experiences, attitudes, and opinions. Moreover, in multiple choice questions, reply options were presented in random order to all respondents to reinforce objectivity.
- **Direct and Indirect Approaches:** the survey employs a combination of direct questions and indirect approaches to measure media content preferences, motivations, and behaviours. While direct questions are commonly used in media consumption surveys, some aspects of media consumption (e.g., news trust) are

deeply ingrained and subconscious, requiring respondents to reflect thoughtfully on their media habits. The survey incorporates a MaxDiff analysis, a driver's analysis and a vignette-based experiment as indirect approaches to measure media content preferences and behaviours of EU consumers.

MaxDiff[1] presents respondents with sets of items, such as different types of media content or attributes related to media consumption (e.g., quality, convenience, affordability), and asks them to indicate the most and least preferred items from each set. MaxDiff analysis does not ask respondents to directly state their preferences or motivations, but it relies on their choices within sets of items, which can reveal their priorities and preferences without necessitating in-depth introspection. In line with the methodology used in previous survey on AV media consumption,[2] MaxDiff analysis generates a relative importance score for each factor, enabling direct comparisons with the current finding to the ones of the previous consumer survey where possible. This score illustrates how significant each factor is when compared to others. The average score for all items is anchored at 100, serving as the benchmark, as commonly done for these types of questions. If all factors held equal importance or were chosen randomly, each would have a score of 100. A score above 100 indicates that a factor is more important or likely than average, while a score below 100 reflects lesser importance. For instance, if Factor A scores 150 while Factor B scores 100, it signifies that Factor A is perceived as 50% more important than Factor B. Conversely, a score of 50 suggests the factor is 50% less important compared to the average.

- **Drivers analysis**, rather than directly asking respondents about their motivations, which can be challenging given the often subconscious nature of media consumption behaviours, indirectly uncovers these motivations. For instance, when investigating what attracts EU consumers value in certain media platforms, this analysis examines the relationship between factors such as brand recognition, usability, pricing, and content quality, with the frequency of platform usage. By examining these drivers, it is possible to uncover valuable insights, such as psychological, economic, and sociocultural factors that play a pivotal role in shaping consumption patterns.
- **Vignette-based experiment:** we conducted a specific methodology referred to as "Contrastive Vignette Analysis" to test how the presence of a logo/brand of a professional media outlet (e.g., "El Mundo" icon) influences people's trust in news content and their likelihood of using the news source in the future. To measure the impact of the icon more accurately, the following procedure has been followed:
  - First, respondents are informed that they will be shown a piece of news in the next questionnaire page and that they have to pay attention as questions about the content of the news will follow.
  - Second, respondents are randomly presented with one of the 3 versions of the vignette: (1) news with NO logo, (2) news with the generic logo "The News logo", and (3) news with a professional logo

[1] Short for Maximum Difference Scaling.
[2] European Commission: Directorate-General for Communications Networks, Content and Technology. (2023).
Consumer survey on consumer behaviour and preferences related to the consumption of audiovisual entertainment content: final report. Publications Office of the European Union. https://data.europa.eu/doi/10.2759/55576

such as "Figaro/El Mundo/Corriere della Sera/etc." (see Figure 3 for an example). The logos in the third version of the vignette were chosen based on their familiarity, representing some of the most visited professional outlets and websites for each Member State[3].

- Third, respondents are asked two questions: (i) one question to measure attention about the topic/content of the news, which serves as a control question, and (ii) one to measure the trust in the credibility of the news and likelihood of sharing it (e.g., "how much do you trust that the news presented in the image is true?", "Considering the news item you have just viewed, how likely are you to share this news with others?").
- Fourth, we measure the general level of trust in the national outlet used. In this way, if someone generally trusts the news outlet we use for the vignette in that country, they might be more inclined to believe the news regardless of the verification logo. On the other hand, if another person is typically sceptical about that outlet, seeing the "Verified" logo might change their mind. This information will be included in the data analysis as a control variable to measure the effects of the icons across different groups of consumers (defined by their level of trust in the media outlet).

1.1. Questionnaire design

The questionnaire is divided into 5 main sections.

Participants first answer 9 socio-demographic questions and 5 questions on overall media trends, which are common to all respondents, to enable the correlation of responses with their consumption patterns and entertainment preferences. Following this, each participant completes two blocks, chosen from four key areas: video gaming, news media content, audiovisual entertainment, and technologies & various topics. [4] For example, Participant A might complete the "News Media Content" and "Video Gaming" blocks, Participant B might complete the "Audiovisual Entertainment" and "Technologies & Various Topics" blocks, while Participant C might complete the "Video Gaming" and "Audiovisual Entertainment" blocks, and so on.

In the following Figure, we show the survey flow and the specific blocks of each section of the survey.

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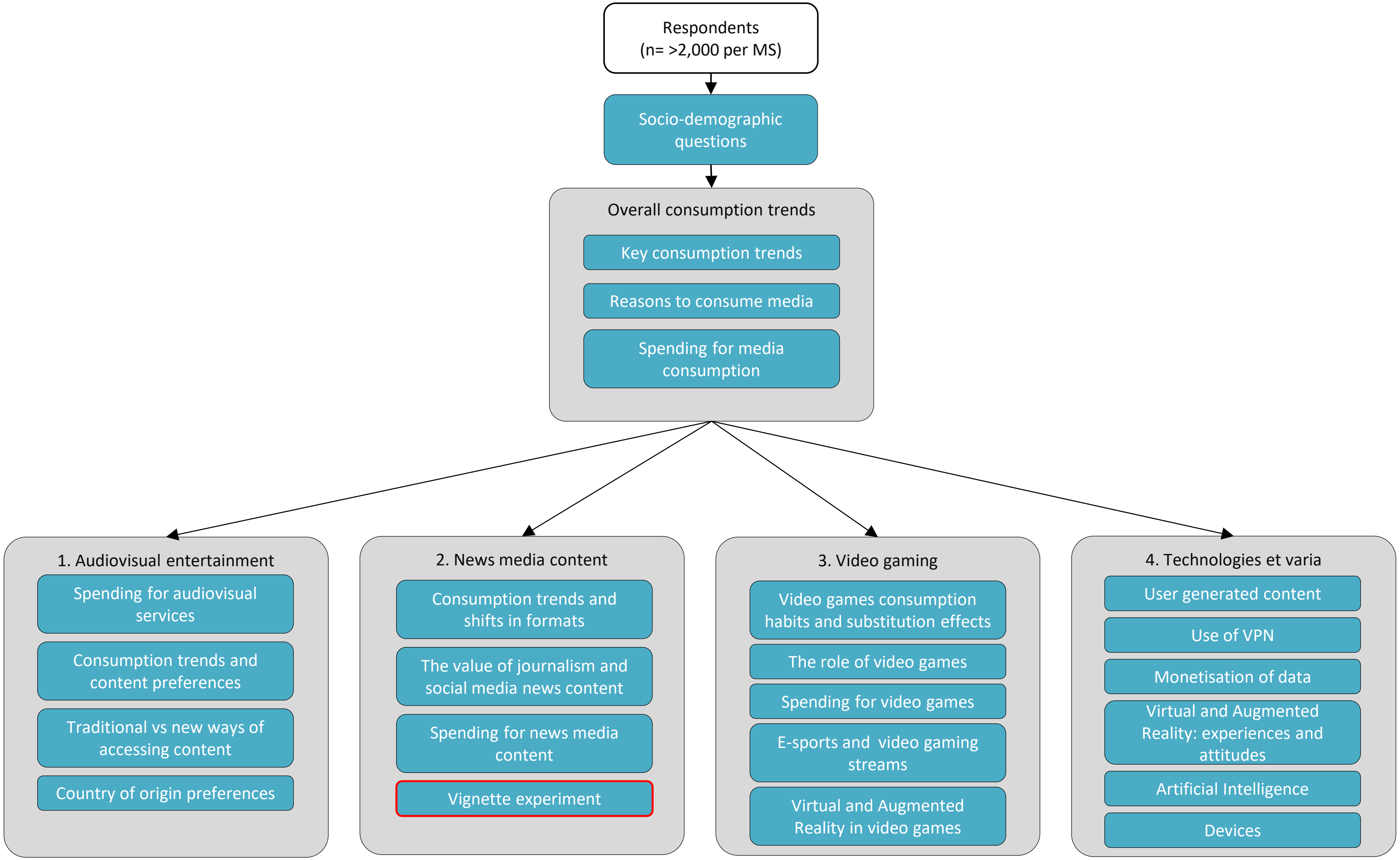
[3] Example available at: https://www.statista.com/statistics/442988/most-visited-news-websites-germany/ and https://www.semrush.com/website/top/global/news-and-media/

[4] In terms of block assignment, the only exception is the Video Gaming block, which is assigned only to respondents who indicated that they play video games at least sometimes, ensuring relevance. The remaining three blocks are assigned uniformly to achieve a similar number of observations for each block. However, it is possible for the distribution of respondents across blocks to vary slightly, as assignment is done *ex ante*. If a respondent begins the survey and is assigned a block but then drops out, or if they are removed during quality checks, this may cause slight variations in the overall distribution due to incomplete responses or exclusions.

Figure 1 Questionnaire design



Source: authors' elaboration

The final version of the questionnaire is included in Annex I. The five key areas address the objectives of the study in the following way:

1. **Overall consumption trends:** this block aims to identify trends in consumer habits, preferences and behaviour relating to the consumption of content across all the sectors of the media industry. In particular, this block of the survey explores the substitution effects between different media content (e.g., AV, news media, video games).
2. **Audiovisual entertainment:** this block aims to identify trends in consumer habits, preferences and behaviour relating to the consumption of audiovisual entertainment content. This block includes some questions from the "Consumer survey on consumer behaviour and preferences related to the consumption of audiovisual entertainment content" (European Commission, 2023) in order to have longitudinal data (see section on longitudinal insight above for more details). In addition, new questions cover new business models, such as streaming, as well as other aspects not already addressed in the aforementioned survey.
3. **News media content:** this block aims to explore consumption habits and shift to new sources of news. Given the new industry trends, questions in this block also aim to understand to what extent consumers are willing to pay for quality news and how much they value professionally produced content, exploring the role of social media and influencers in this sector. In this block, the contrastive vignette is used as explained in the previous section.
4. **Video gaming:** the development of this block is informed by a recently published report on video games in the EU (European Commission, 2023b).[5] This block includes questions to understand video game habits, device preferences, the rise of e-sport and gaming live streaming, as well as dedicated questions to anticipate future consumption trends around games (e.g., the use of XR technology).
5. **Technology and innovation trends in media consumption:** this block includes questions related to a wide array of topics, that are strongly connected to AV, news media, and video games studied in the previous sections. This section covers (i) the nature and features of User-Generated Content (UGC)[6], including consumers' preferences towards UGC, (ii) the use of VPN[7], (iii) monetization of data and consumption, (iv) habits and interest regarding the use of XR content, (v) consumer perceptions of AI-generated content, including the use of AI in the media, (vi) habits regarding the use of smart TVs, (vii) preferences towards the country of origin of media companies and (viii) the popularity of Ips/creation across media platforms.

1.2. Survey target group and data sampling approach

The consumer survey targeted the general population aged 18 years and over in all the 27 EU Member States. An online survey (computer-assisted web interview) with a planned average length of ~20 minutes was conducted in the 27 EU countries aiming to target a representative sample of around 2,000 respondents per country (except for Luxembourg

[5] European Commission: Directorate-General for Communications Networks, Content and Technology. (2023b). *Understanding the value of a European video games society : final report*. Publications Office of the European Union. Available at: https://data.europa.eu/doi/10.2759/332575.
[6] UGC: short for user generated content.
[7] VPN: short for virtual private network.

and Cyprus, with a sample size of approx. 1,000 in each, and for Malta where we aimed at approx. 600 responses, due to their smaller populations).

During data collection, quotas were placed on socio-demographic characteristics (i.e., age, gender, education, income), following the methodology and results of the Eurostat ICT survey[8] on ICT usage in households and by individuals in this regard. In all countries, non-probability volunteer online access panels served as the sampling frame. Respondents were randomly selected from these panels based on their profile information (age, gender, geographic region, education, and financial status) and pre-defined sub-sample quotas, aligned with official population statistics from Eurostat. Data gathering activities were undertaken through fieldwork conducted using online panels in the selected countries. All these panels comply with ESOMAR, MRS, CASRO, MRA&ARF quality and personal integrity standards, and they offer additional functions designed to enhance quality.

1.3. Translation process

The survey was translated into 22 EU languages (Bulgarian, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Italian, Latvian, Lithuanian, Polish, Portuguese, Romanian, Slovak, Slovenian, Spanish and Swedish), allowing respondents to choose their preferred language. The final questionnaire underwent a translation process using a back-translation method combined with monolingual testing. First, a qualified translator translated the survey from English (the source language) into the target language. Then, the fieldwork coordinator translated it back into English. Both English versions were compared for accuracy, and the target language version was tested with monolingual participants. The final version of each questionnaire was then programmed into Qualtrics[9], an online platform specifically designed for survey research. Before starting the data-gathering process, a pre-test and a pilot of the questionnaire were conducted with around 2,000 participants to ensure that data collection worked as planned.

1.4. Data quality measures

To ensure the integrity of the survey data, several quality control measures were implemented. Respondents were excluded if they met any of the following criteria: (1) failing at least 2 of the 4 attention check questions embedded in the survey (see Annex 1), (2) being identified as likely bots based on suspicious response patterns, or (3) completing the survey in less than 5 minutes, classified as "speeders". Respondents who were excluded based on these criteria were replaced with new participants to maintain the representativeness and reliability of the sample. Of the 68,510 survey participants, 12,746 were excluded for not meeting the criteria, leaving 55,746 respondents who fully completed the survey and included in the analysis for this report.

For a few isolated questions, specific answers were excluded if they were self-conflicting or inconsistent. For example, respondents replying that they never use social media in Question 1 "In the last year, how often did you do the following activities?" were excluded from the count of those who replied yes to Question T3 "Have you ever created and shared content (podcast, short videos or blogs) on platforms like YouTube, Spotify, and App stores, to get remuneration from it?". Other cases are pointed out in chapter 2-5 of the

[8] Eurostat (2023). E-commerce continues to grow in the EU. Available at: https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20230228-2
[9] Available at: https://www.qualtrics.com

Report. Moreover, in Annex V, the limitations of the research are presented, addressing anomalies and potential sources of bias within the survey data.

1.5. Fieldwork waves and achieved sample

The survey was conducted in two waves across the 27 EU target countries. In the first wave, approximately 50,000 responses were collected (from 08/07/24 to 08/08/24). During the first wave, it was observed that certain categories, such as respondents with higher education levels, were overrepresented in certain countries, likely due to the online nature of the survey and selection bias. To address this imbalance, a second wave of fieldwork was launched, collecting an additional ~10% of the collected sample (from 23/09/24 to 07/10/24), specifically targeting the underrepresented groups in the most affected countries.

In total, **55,746 respondents** completed the survey. This large sample size ensures a high level of precision, providing a confidence interval of ±0.42pp at a 95% confidence level. The margin of error calculation uses a conservative estimate of p=50%, which assumes the maximum possible variability in responses. This approach ensures that the results are robust, even under the most conservative assumptions. By accounting for the maximum response variability, this method guarantees that the findings accurately reflect the views and characteristics of the target population.

The analysis focused on exploring descriptive relationships across the dataset, including breakdowns by age, gender, or other demographic variables, as well as consumption patterns (see Anneex II. Research questions for details). Given the broad scope of the survey, which includes numerous variables and subgroups, some observed patterns may occur by random chance, even without a true underlying relationship. This issue becomes more pronounced as the number of potential comparisons increases.[10] Additionally, some relationships may be influenced or explained by "third variables"—unmeasured factors that correlate with both variables in question but do not reflect a direct causal link between them. For instance, a relationship between news consumption frequency and gaming preferences could also be influenced by socio-demographic factors such as age or education, which shape individuals' engagement with different forms of media.

It is also important to note that correlation does not imply causation. While some patterns may suggest meaningful relationships, they do not establish direct cause-and-effect links. Interpreting such relationships requires some level of caution, with an emphasis on supporting evidence, theoretical frameworks, and consistency with established findings to avoid drawing unwarranted conclusions.

As a general caveat, this study focuses on consumer perceptions, behaviors, and preferences, providing a snapshot of the situation at a specific point in time. Consequently, the findings should be interpreted with caution and complemented by additional evidence,

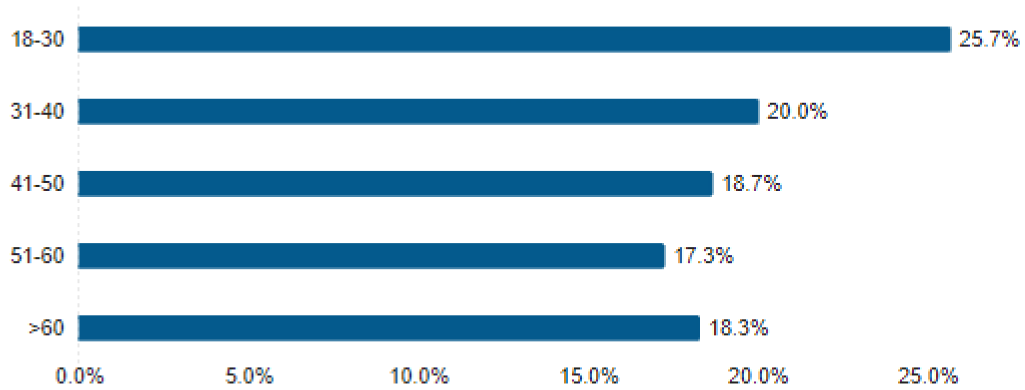
[10] We use a 5% threshold to identify noteworthy differences in observed patterns. This practical threshold highlights differences between groups, focusing on meaningful deviations in the data. For instance, differences of 5 percentage points or more are considered substantial enough to warrant attention, ensuring that the analysis captures key patterns and trends. In a survey with approximately 120 questions and 60 testable relationships (e.g., patterns identified through conditional frequency tables), the likelihood of spurious patterns increases with the number of comparisons. This phenomenon, known as the multiple comparisons problem, underscores the importance of interpreting results with caution. The survey's large sample size significantly reduces random noise, enhancing the reliability of observed patterns with substantial differences. This minimizes the likelihood of spurious conclusions while allowing us to focus on identifying meaningful insights.

particularly for questions where audience perceptions may not fully align with the actual dynamics of the market.

To address these challenges, our interpretation of results was guided by a theory-driven approach. Specifically, observed patterns were evaluated for their alignment with established research findings and plausible theoretical frameworks. By focusing on consistency and theoretical relevance, we aim to distinguish meaningful insights from coincidental trends and account for the potential influence of underlying third variables. As discussed in Section 1.2, the use of quotas during data collection ensured that the sample reflected the population structure in terms of key socio-demographic variables, such as age, gender, and education. This approach ensures that the descriptive findings are robust, minimizing the risk of over-interpretation or spurious conclusions.

The survey included participants across distinct age groups, providing a diverse representation of ages. The largest segment of respondents fell within the 18-30 age range, accounting for 25.7% of the total sample. This was followed by the 31-40 age group, which comprised 20.0% of participants. The next largest group was those aged 41-50, making up 18.7% of the respondents. Individuals aged between 51 and 60 represented 17.3% of the sample, while those aged over 60 accounted for 18.3%. (see more on weighing in section 1.6).[11]

Question D1. Age

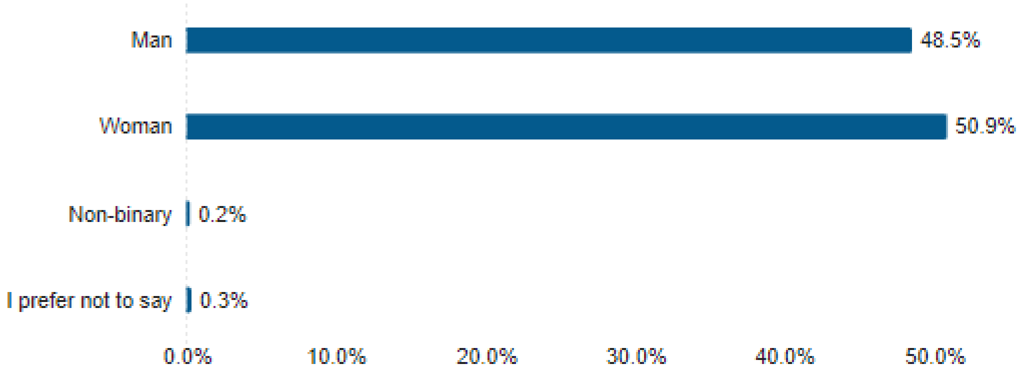


The majority of respondents identified as women, comprising 50.9% of the total sample. This was closely followed by those identifying as men, who made up 48.5% of participants. A small proportion of respondents identified as non-binary, representing 0.2% of the sample, while 0.3% of participants preferred not to disclose their gender identity. [12]

[11] The survey's age distribution, while not perfectly aligned with Eurostat data, demonstrates reasonable representativeness across most categories before weighting adjustments. Age groups 41-50 and 51-60 are closely aligned with Eurostat figures, with deviations within 2% (18.7% vs. 17% and 17.3% vs. 17%, respectively). Similarly, the age group 31-40 shows a moderate overrepresentation of 4% (20% in the survey vs. 16% in Eurostat data), while the youngest group, 18-30, is overrepresented by approximately 8.7% (25.7% vs. 17%). The largest discrepancy lies with respondents over 60, who are underrepresented in the survey (18.3% vs. 34%).

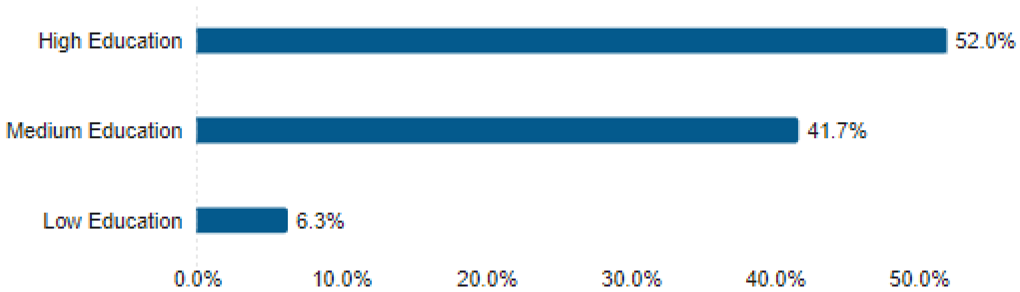
[12] The survey's gender distribution aligns very closely with Eurostat data, indicating strong representativeness for this demographic category. In the survey, 48.5% of respondents identified as men and 50.9% as women, compared to Eurostat figures of 49% men and 51% women. These minimal deviations (0.5% for men and 0.1% for women) demonstrate that the gender distribution in the survey is highly consistent with official population statistics.

Question D2. Gender



The survey assessed participants' highest level of education, categorising responses according to Eurostat classifications. A majority of respondents reported achieving a high level of education, making up 52.0% of the sample. This was followed by those with a medium level of education, who constituted 41.7% of participants. A smaller proportion, 6.3%, indicated having a low level of education.[13]

Question D3. Education



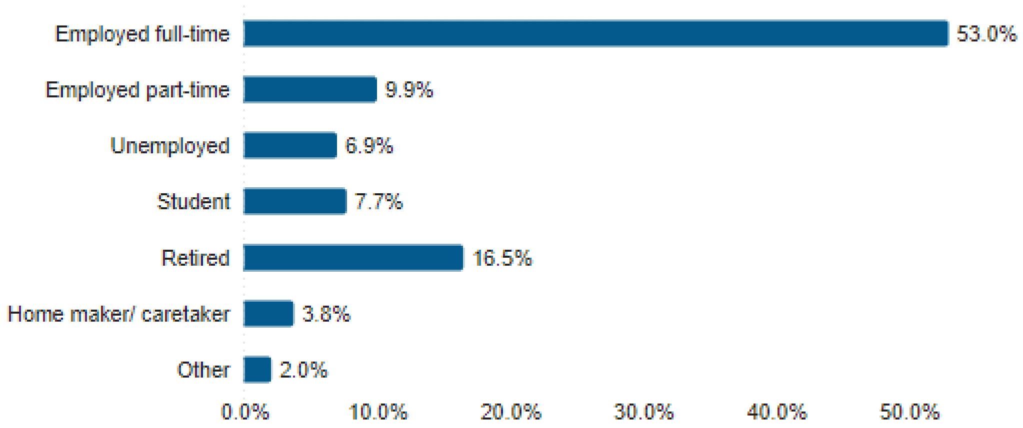
The majority, 53.0%, reported being employed full-time. A smaller proportion of 9.9% indicated they were employed part-time. Retired individuals accounted for 16.5% of the sample, while students made up 7.7%. The unemployed group represented 6.9% of participants, and 3.8% identified as homemakers or caretakers. Additionally, 2.0% of respondents selected the "Other"[14] category.[15]

[13] The survey's education distribution shows deviations from Eurostat statistics. Respondents with high education represent 52.0% in the survey, compared to 31% in Eurostat, indicating an overrepresentation of higher-educated individuals. Medium education levels are reported by 41.7% of respondents, slightly below the Eurostat figure of 46%. Low education is significantly underrepresented, with only 6.3% of survey respondents compared to 23% in Eurostat. These differences highlight the need for weighting to adjust for the overrepresentation of respondents with higher education and ensure alignment with population-level statistics.

[14] For those who indicated "Other" in question D4, the main categories indicated include being self-employed, freelancers, and business owners. Some also mentioned being on disability or incapacity leave due to health issues. A number of responses highlighted individuals who are students or on maternity leave. Other less common mentions include volunteering, military service, and retirement with part-time work.

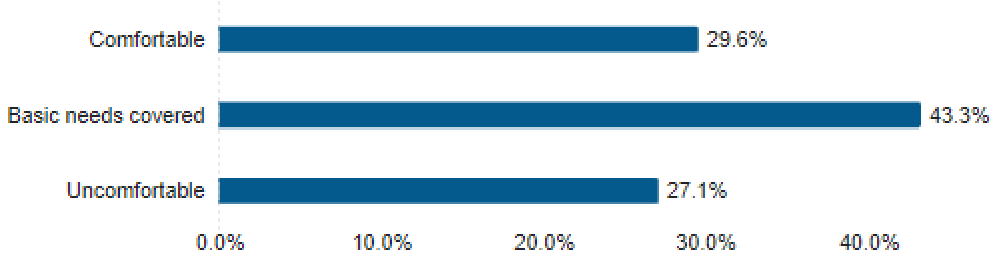
[15] The categorisation of job status in this survey differs from Eurostat's EU Labour Force Survey Statistics, making direct comparisons challenging due to variations in definitions and classification approaches.

Question D4. Employment status



To assess economic well-being across EU27 countries, respondents were asked to rate their financial situation. Based on their answers, respondents were grouped into three categories: "Comfortable", "Basic needs covered," and "Uncomfortable".[16] This categorization provides a comparative measure of financial well-being across countries, acknowledging that perceptions of financial comfort can vary widely with local costs of living and economic circumstances. As shown in the table, the distribution of respondents across these categories is relatively balanced, with 43.3% indicating their basic needs are covered, 29.6% feeling that their financial situation is comfortable, and 27.1% feeling that it is uncomfortable.

Question D5. Financial situation



In addition to subjective financial perception, data was collected on respondents' monthly net household income, using predefined brackets ranging from "Below €500" to "Over €9,000".[17] The table below presents the average income brackets selected, illustrating

[16] Respondents were classified into three financial well-being categories based on their self-assessed financial situation:

- Comfortable: Individuals who feel their income allows them to live comfortably, meeting all needs without financial strain.
- Basic Needs Covered: Individuals who report that their income allows them to manage daily needs with reasonable financial stability, but without significant comfort.
- Uncomfortable: Individuals experiencing varying degrees of financial difficulty, further divided into:
  - Partial Coverage of Needs: Those whose income only partially meets their daily needs.
  - Inadequate for Comfortable Living: Those who feel their income does not allow them to live comfortably.
  - Unable to Meet Daily Needs: Those whose income does not allow them to meet even basic daily expenses.

[17] Values were converted into the respective local currencies for Member States that have not adopted the euro as their official currency.

income distribution across various European economic contexts. As expected, lower-income countries display a greater concentration in the lower brackets, while higher-income countries show more presence in the upper brackets.[18]

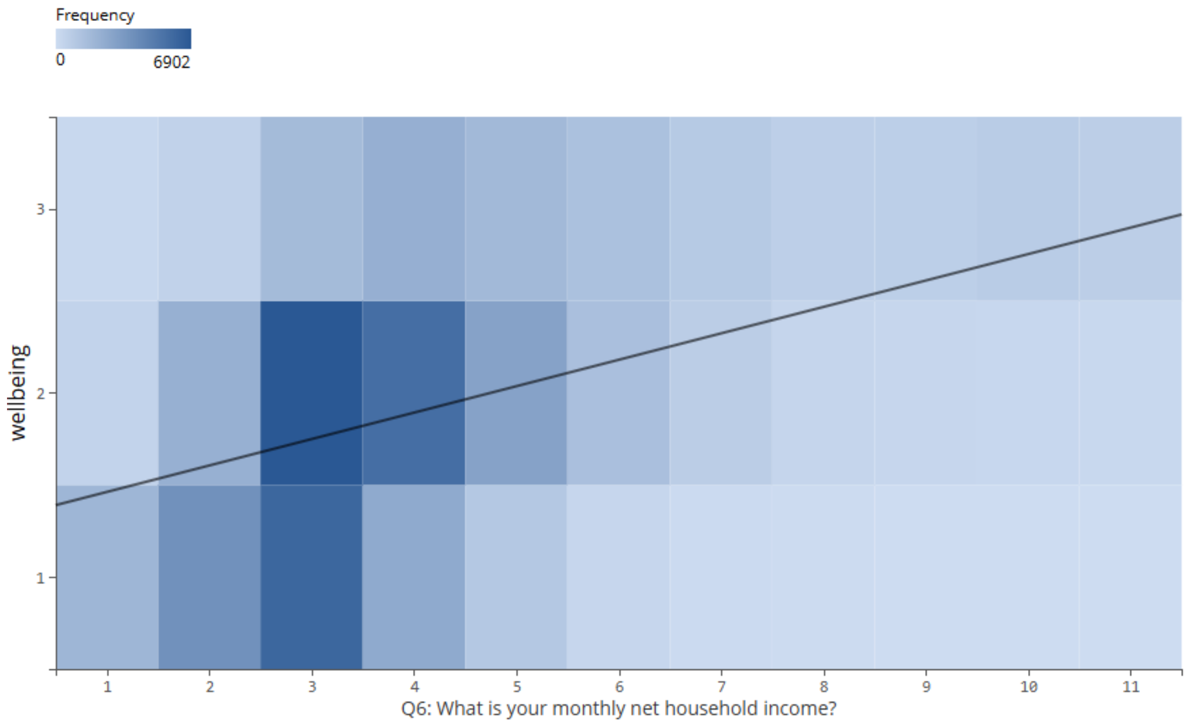
Question D6. Monthly net household income

	Below €500	€501 - €1,000	€1,001 - €2,000	€2,001 - €3,000	€3,001 - €4,000	€4,001 - €5,000	€5,001 - €6,000	€6,001 - €7,000	€7,001 - €8,000	€8,001 - €9,000	Over €9,000
AU	2.6%	4.7%	15.8%	17.9%	13.1%	10.3%	10.1%	6.4%	6.0%	7.5%	5.7%
BE	2.9%	2.9%	24.1%	23.9%	18.9%	14.7%	6.3%	2.7%	1.4%	0.7%	1.6%
BG	14.2%	33.2%	36.5%	10.4%	3.1%	1.0%	0.6%	0.3%	0.2%	0.2%	0.3%
CY	0.9%	5.0%	16.8%	16.9%	14.3%	9.7%	9.3%	8.7%	9.9%	7.0%	1.6%
CZ	4.2%	16.2%	36.4%	22.8%	10.0%	3.2%	1.3%	1.0%	2.0%	1.6%	1.2%
DE	3.6%	8.2%	25.6%	24.7%	16.1%	10.3%	4.8%	2.2%	1.3%	1.0%	2.0%
DK	1.9%	3.9%	10.1%	11.4%	11.3%	9.6%	10.3%	9.1%	11.3%	14.2%	7.0%
EE	3.0%	8.1%	13.2%	12.1%	8.6%	6.1%	7.3%	9.4%	13.2%	13.7%	5.4%
EL	6.2%	22.0%	34.2%	15.4%	5.7%	1.6%	1.3%	1.3%	2.7%	5.0%	4.5%
ES	3.6%	11.0%	32.3%	25.7%	15.4%	5.5%	2.8%	1.2%	0.6%	0.5%	1.5%
FI	3.4%	9.7%	23.8%	20.5%	16.2%	10.8%	6.1%	3.7%	2.2%	1.4%	2.1%
FR	2.6%	7.7%	25.8%	27.1%	16.9%	9.6%	4.2%	2.1%	1.2%	1.1%	1.8%
HR	5.0%	12.9%	23.1%	16.8%	7.5%	4.2%	5.6%	4.5%	9.0%	7.6%	3.6%
HU	15.2%	34.7%	35.3%	10.0%	2.2%	1.1%	0.5%	0.2%	0.1%	0.3%	0.5%
IE	2.0%	6.2%	11.6%	13.5%	11.1%	9.3%	12.6%	9.4%	12.1%	8.5%	3.5%
IT	3.7%	8.7%	33.6%	25.6%	13.8%	6.1%	3.4%	1.5%	0.9%	0.9%	1.9%
LT	7.0%	18.4%	23.6%	12.8%	5.5%	6.9%	7.0%	4.0%	5.8%	5.8%	3.3%
LU	1.3%	1.1%	3.2%	7.4%	8.4%	8.3%	12.8%	14.6%	20.2%	15.8%	7.0%
LV	8.9%	15.6%	20.3%	9.5%	5.5%	5.5%	6.5%	5.6%	7.8%	9.6%	5.1%
MT	0.7%	2.0%	3.3%	7.3%	6.6%	7.6%	13.1%	14.6%	21.6%	15.4%	7.9%
NL	0.9%	2.0%	12.6%	18.8%	16.9%	14.6%	12.2%	9.8%	6.3%	3.6%	2.2%
PL	5.7%	14.4%	32.1%	21.5%	8.5%	4.2%	3.0%	1.6%	3.2%	3.4%	2.5%
PO	3.5%	15.4%	38.1%	26.2%	9.3%	3.5%	1.7%	0.5%	0.3%	0.3%	1.2%
RO	10.2%	23.0%	35.0%	9.1%	3.1%	1.4%	2.0%	2.3%	2.6%	3.8%	7.5%
SE	3.0%	6.9%	23.1%	22.7%	15.0%	10.3%	8.0%	4.5%	2.3%	2.0%	2.0%
SI	3.3%	8.7%	15.0%	13.4%	11.5%	8.8%	12.2%	11.0%	10.1%	5.0%	1.0%
SK	5.2%	18.3%	33.2%	19.4%	6.5%	2.8%	3.4%	3.7%	2.0%	3.2%	2.1%
Total	4.8%	12.4%	24.5%	17.6%	10.5%	6.9%	5.9%	4.6%	5.1%	4.7%	3.0%

However, absolute income levels alone may not fully capture economic well-being, given the variation in purchasing power and living costs across the EU. To address this challenge in cross-country economic comparisons, **subjective financial perception was used as a proxy for economic well-being in correlation and profiling analyses**. This approach allows for a standardized assessment that adapts to differing socio-economic conditions, reflecting not just income levels but also individual factors such as personal expenses, debt, and financial expectations. In a cross-country context, where absolute income differences may be less meaningful, this subjective measure provides a clearer view of respondents' actual financial comfort. To validate this approach, a regression analysis between subjective financial perception and reported income in EUR has been conducted. The results reveal a moderately positive correlation (Spearman's rho: 0.432, $p < 0.001$), indicating that as income increases, respondents are significantly more likely to report feeling financially comfortable, as shown in the Figure below. This correlation supports the use of subjective perception as a reliable proxy for income.

[18] The income brackets used in this analysis are not directly comparable to Eurostat's ILC_DI01 dataset due to differences in the categorisation of income levels and the methodologies employed for defining and collecting income data.

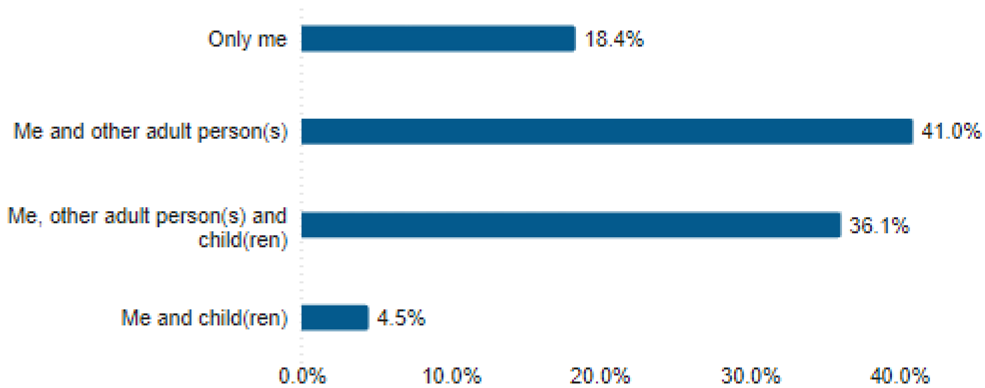
Figure 2 Correlation - subjective financial perception and reported income (EUR)



Note: The graph displays subjective financial well-being reported by respondents on the y-axis: 1 ("Comfortable"), 2 ("Basic needs covered"), and 3 ("Uncomfortable"). The x-axis represents monthly net household income, ranging from 1 ("Below €500") to 11 ("Over €9,000"), with intermediate categories representing incremental income brackets.

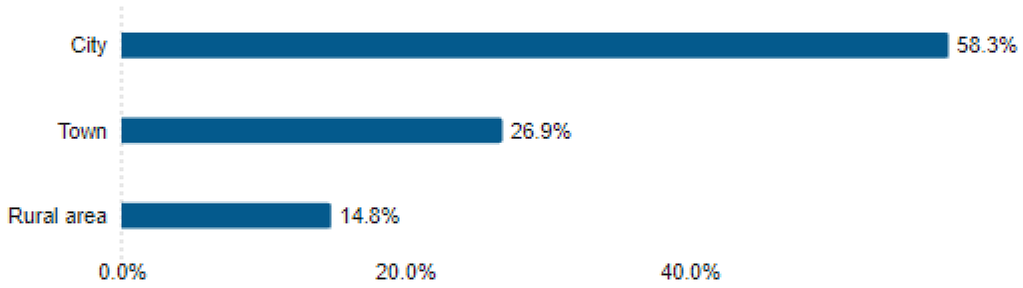
A significant proportion of participants, 41.0%, reported living with another adult person(s) in their household. Another 36.1% indicated living with other adult person(s) and child(ren). Those living alone made up 18.4% of the respondents, while 4.5% reported living with child(ren) only.

Question D7. Household composition



A majority of participants, 58.3%, reported living in a city. Additionally, 26.9% indicated residing in a town, while 14.8% of respondents reported living in a rural area.

Question D8. Place of residence



1.6. Sample representativeness and data weighting strategy

To ensure the overall representativeness of the sample allowing us to draw conclusions at the EU level, the final sample was weighted to the universe proportions[19] based on:

(1) countries' population size, correcting for differences in population size between target countries,

(2) gender distribution,

(3) education level for each target country.[20]

To reach the target quotas for each country, some flexibility was applied in the sampling for age and income distribution. For age, the final sample shows a deviation within ±6% from Eurostat standards.

For income, while precise alignment with Eurostat was challenging due to differences in income bracket definitions, the distribution reflects general economic patterns across countries. Lower-income countries show a higher concentration in the lower brackets, while higher-income countries have greater representation in the upper brackets.

As with many online surveys that draw from online panels, there is a possibility that this format may attract participants who are more digitally engaged. These individuals might have slightly different consumption habits, such as a tendency to use digital platforms more frequently or engage with online news and social media, which could subtly influence the results. This potential factor is worth keeping in mind when interpreting the findings.

Yet, the online survey drawing from online panels is sufficiently representative because the weighting applied ensures that the sample accurately reflects the EU population in terms of critical demographic characteristics, including country population size, gender, and education level. Additionally, minor deviations in age and income distribution remain within accepted standards for survey research, thus not compromising the validity of the findings. Overall, the weighting applied allows for reliable and generalizable conclusions at the EU level, providing confidence in the survey's capacity to reflect the views and behaviours of the broader European population.

[19] The weighting strategy was based on official Eurostat statistics to ensure accuracy and consistency with EU demographic data: https://ec.europa.eu/eurostat/databrowser/view/edat_lfs_9903__custom_13746572/default/table?lang=en and https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en&category=t_demo.t_demo_pop

[20] The level of achieved education was assessed using the ISCED categories: high (ISCED 5 or over), middle (ISCED 3-4) or low (ISCED 2 or lower) education level.

Ensuring Representativeness Across Survey Blocks. To ensure the representativeness of the sample across the different survey blocks, we conducted robustness checks comparing age, gender, and education distributions within each block (News Media Content, Video Gaming, Audiovisual Entertainment, and Technology and innovation trends in media consumption) against the total sample. These checks confirm that the demographic composition of respondents within each survey block closely aligns with the overall sample, enabling reliable and comparable analyses across blocks.

Overall, the demographic representativeness of the total sample is well-maintained across all survey blocks for age, gender, and education, **ensuring representativeness for each block.** Since the total sample was weighted to align with official statistics, this consistency across survey blocks ensures that findings from each block remain valid and comparable. While slight variations are expected due to the random allocation of participants, these differences are minimal. Specifically, age distributions across survey blocks closely match the total sample, with deviations ranging between ±0.5% and ±2.9%, and an average deviation of ±1.7%. Gender distributions also demonstrate strong alignment, with variations between ±0.3% and ±2.8%, and an average deviation of ±1.5%. Similarly, education distributions (categorized as low, medium, and high) reflect the total sample, with deviations ranging from ±0.2% to ±2.7% and an average deviation of ±1.8%.

2. Survey results

In this section, findings from the survey conducted in the 27 Member States (N=55,746) are presented. First, a descriptive presentation of the responses to each question is outlined, highlighting significant findings for each block of the survey.[21] Second, an analysis of research questions for each block of the survey has been carried out, to present possible correlations.

2.1. Media consumption trends

2.1.1. Overall consumption trends

Media consumption in the last 12 months

Practically all respondents consume media content regularly.

Daily engagement is highest with social media and news, which are central to the daily routines of most respondents. Listening to music also remains strong, with more than half of the participants engaging daily. Films, series, and documentaries are regularly consumed by a significant portion, while playing video games, and watching sports and reality shows see more varied and polarized levels of engagement. Altogether, it appears some parts of the population (22% to 25%, but often different people) simply never watch sports, reality shows or play games.

In detail, **social media is the most prevalent activity**, with 66% of respondents having daily usage. An additional 24% engage with social media one or more times a week. Only 4% use social media every month and 6% never. This highlights the central role of social media in daily life for most respondents.

The consumption of news is the second most frequent activity among respondents, with 53% engaging with news content daily. 34%, access news a few times a week or weekly, while 7% consume news once a month. Only 5% of respondents report never consuming news.

Listening to music is another frequent activity, with 52% of respondents listening daily. A further 37% listen a few times a week or weekly. Monthly listeners account for 6%, and just 4% never listen to music.

Films, series, and documentaries are also widely consumed, with 36% of respondents watching daily. A notable 53% engage with this type of content once or several times a week. Monthly viewers account for 8%, and only 3% reported never watching films, series, or documentaries.

Video gaming is a regular activity for 26% of respondents who play daily, 36% engage once or a few times a week, while 12% play monthly, and 25% never play video games.

Watching sports daily is common among 13% of respondents, while 45% do so one or more times a week. 19% watch sports monthly and a notable 22% never watch them.

[21] The percentages in this survey have been rounded to the nearest whole number to enhance clarity and ease of comprehension, which may cause the total to slightly exceed or fall below 100%. Slight variations in bar lengths are due to rounding differences. To maintain clarity and simplicity in visual presentation, percentages are shown as whole numbers.

Reality and other entertainment shows are watched daily by 11% of respondents, with 43% engaging a few times a week or only once a week. A further 20% watch these shows monthly. 25% of respondents never watch reality or entertainment shows.

Media consumption patterns vary significantly by demographic characteristics, shaping distinct trends across different types of content.

a) Gender-wise, **women tend to use social media, listen to music, watch films, series or documentaries, play video games and watch reality shows or other entertainment shows more frequently than men.** Reality and other entertainment shows reveal the starkest difefrence, with 60% of women watching them daily, few times a week or weekly, compared to just 48% of men. In contrast, **men watch sport more frequently than women,** with 71% of men tuning in daily, few times a week or weekly, compared to only 49% of women. **News consumption is balanced across genders**, with 88% of men and 87% of women consuming news daily, few times a week or weekly.

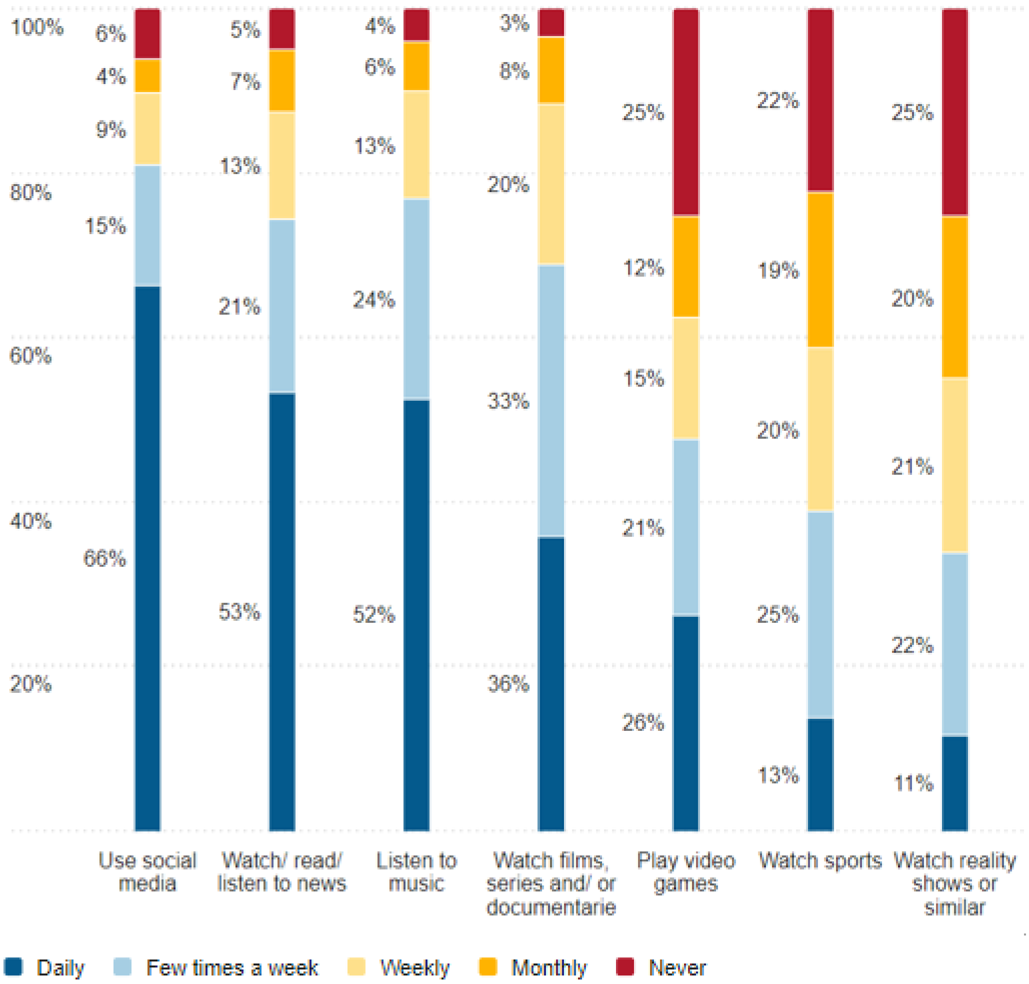
b) **The correlation between media consumption preferences and age also reveals some patterns.** Films, series and documentaries are consistently watched across all age groups. In contrast, daily, few times a week or weekly social media (94%), music (94%), video games (73%) and reality or other entertainment shows (60%) consumption is higher among those aged 18 to 30, compared to, respectively, 81%, 83%, 44% and 48% of those aged over 60. Older people to consume more news and sports, compared to younger consumer groups. 95% of those aged over 60 consume news daily, few times a week or weekly, compared to 78% of those aged 18-30, whereas consumption of sport is this frequent for 62% of those over 60 and for 55% of people aged 18-30.[22]

c) The education level and financial situation of individuals play a role in news, music, video games, sport and reality or other entertainment shows consumption, where those higher educated and living in a more comfortable financial situation tend to consume these media slightly more then other groups. Usage of social media and consumption of films, series or documentaries tend to remain stable across different education level and financial situations.

d) Finally, no notable differences emerge when examining media consumption preferences in relation to **employment status and family circumstances**. Moreover, no meaningful correlation emerges between consumption preferences and the **place** where an individual lives (city, town, rural area).

[22] The strongest correlation between media consumption and age was observed with news consumption, which showed a positive correlation (Spearman's rho = 0.327, $p < 0.001$), indicating that older age groups are more likely to consume news frequently. Conversely, several media categories demonstrated negative correlations with age, reflecting higher consumption among younger age groups: social media usage (Pearson's $r = -0.189$, $p < 0.001$), listening to music (Pearson's $r = -0.153$, $p < 0.001$), and engagement with video games (Pearson's $r = -0.233$, $p < 0.001$). These coefficients suggest age-related differences in media preferences.

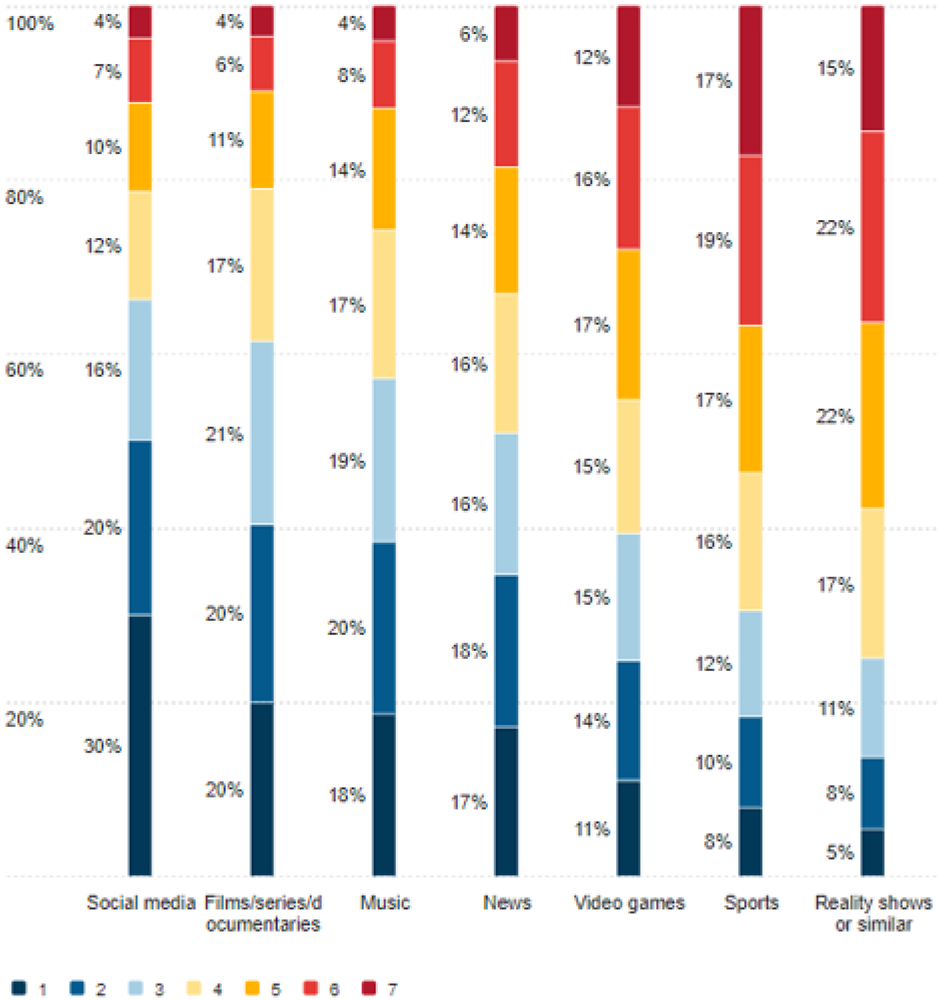
Question 1. In the last year, how often did you do the following activities? (n=55,746)



Media consumption preferences

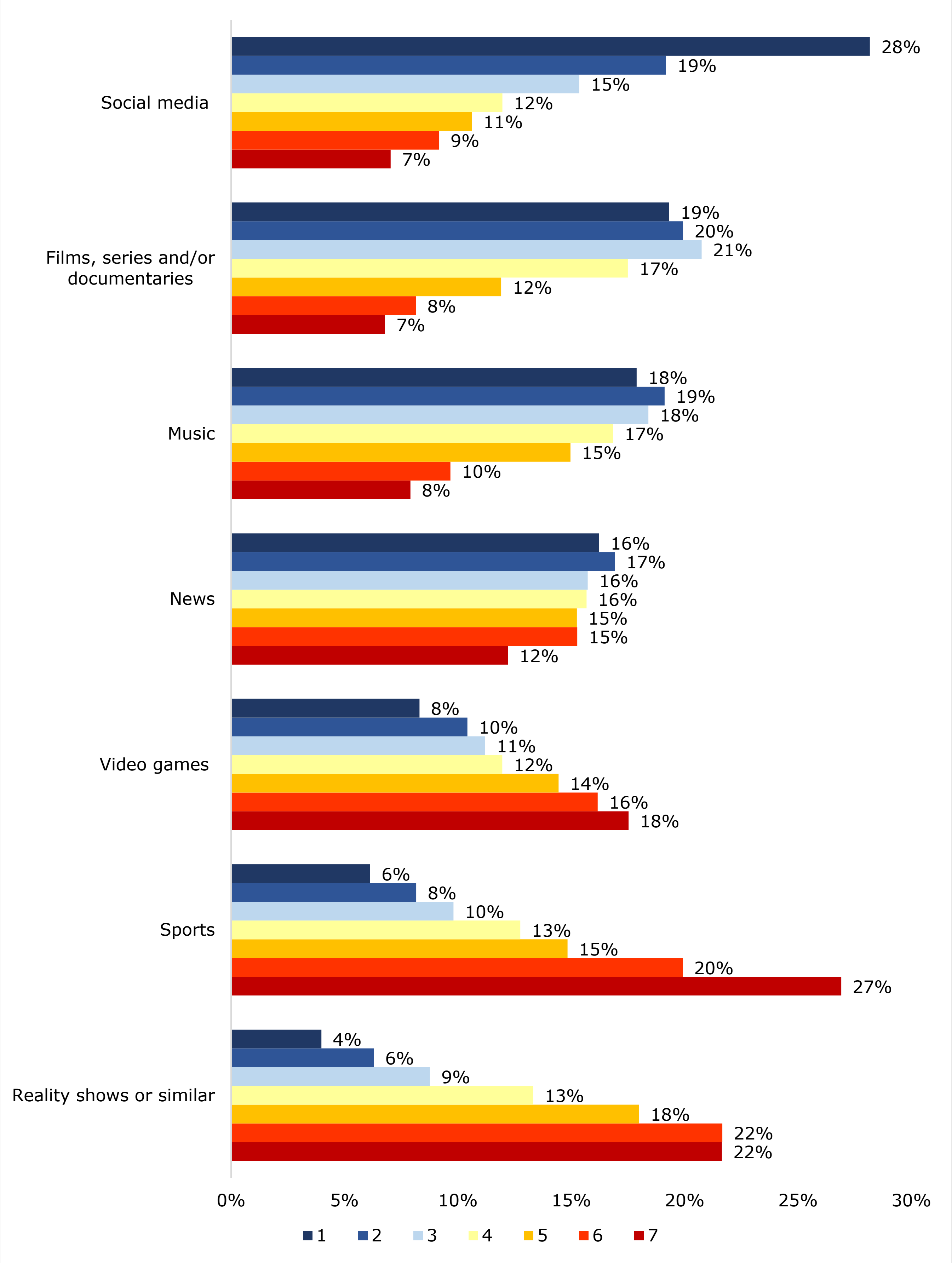
Respondents (n=55,746) were asked about ranking media activities from the one where they spend the most time (value equal to 1) to the least (value equal to 7) over the last year. **Social media ranks first**, coherently with responses to Question 1, followed by watching films, series, and documentaries and listening to music. While news consumption is the second most frequent activity in respondents' daily routines (as seen in Question 1), it ranks fourth in terms of time spent (as indicated in Question 2). This suggests that, for many, news is consumed in shorter, more frequent bursts, rather than as a primary, time-intensive activity. This "news snacking" pattern implies that while news remains essential to daily engagement, it is approached differently than entertainment content, which tends to hold attention for longer periods per session. Consumption of news is followed by playing video games and watching sports. Reality shows and other entertainment content rank last, in line with the previous question. The fact that playing video games, watching sports, and consuming reality shows and other entertainment content rank last in both questions suggests that these activities occupy a more niche role in respondents' media consumption habits, appealing to more specific interests rather than widespread, regular engagement.

Question 2. Please rank the following options from the one you spend the most time on (1) to the one you spend the least time on (7). (n=53,056)[23]



[23] Social media: n=49,453; Films/series/documentaries: n=50,976; Music: n=50,617; News: n=50,145; Video games: n=39,757; Sports: n=41,312; Reality shows or similar: n=39,766.

Question 2b. Media Usage Share Across Different Ranking Levels



Substitution effects in the last 12 months

A majority of respondents reported no significant changes in their media consumption habits over the past year. Yet, around 1/3 of users reported an increase in their engagement for most media activities, except for watching reality shows or other entertainment programmes.

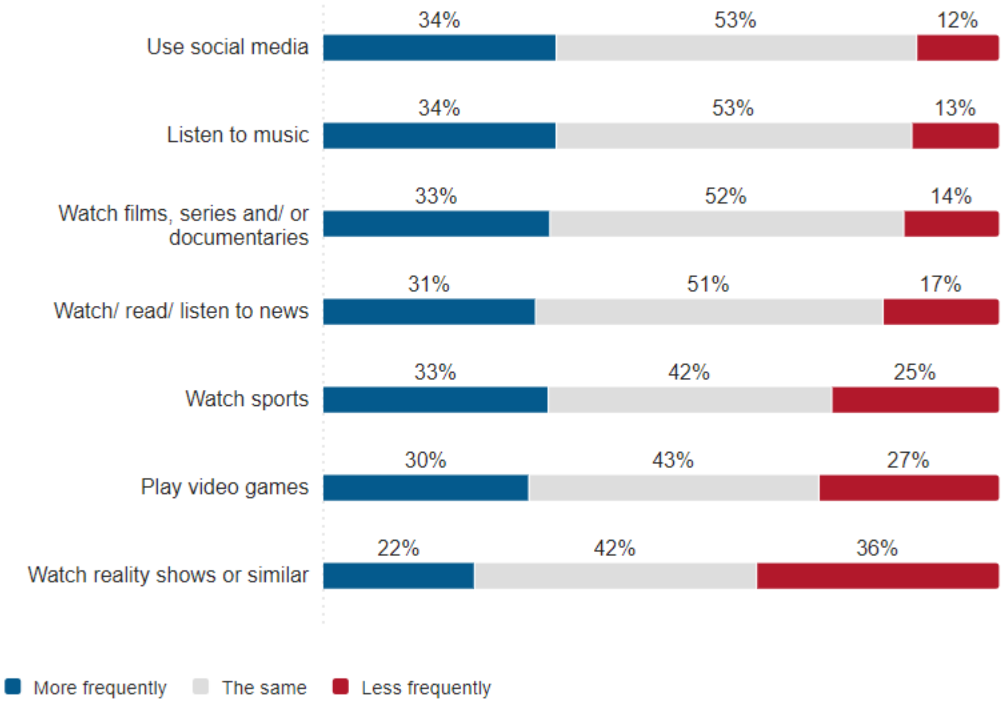
The relatively high proportion of users increasing these activities implies that respondents are expanding their engagement with the media types. Moreover, the fact that more people increased their frequency in most categories suggests a trend towards greater media engagement overall. In other words, while some maintained their previous consumption habits, **those who did change their behaviour were more likely to increase their usage than decrease it**, apart from reality shows or similar programs.

Social media usage has increased for 34% of respondents and has decreased for only 12%. The consumption of music, films, series, documentaries and news shows very similar statistics.

Watching sports and playing video games saw an increase in engagement for about one-third of respondents too. At the same time, both activities also show a significant proportion of people consuming them less frequently, with 25% watching less sports and 27% playing video games less often. However, both saw a net increase of 8 and 3 percentage points, respectively.

Reality and other entertainment shows have the highest percentage of respondents who report watching them less frequently, at 36%. Only 22% have increased their viewing, indicating a general decline in the popularity of these types of programmes.

Question 3. For each of the following categories, please indicate whether you have been using it less frequently, more frequently or the same in the last 12 months. (n=55,746)



Content - interests alignment

The survey results provide a comprehensive overview of how well the available content across various services aligns with the interests of respondents. Overall, respondents are generally satisfied with the content they encounter.

When it comes to audiovisual entertainment, such as films, series, and TV shows, the majority of respondents—60%—expressed satisfaction with the offer to which they have access. In contrast, a smaller proportion, 15%, felt that there is insufficient content to match their interests, while 11% found the abundance of content overwhelming.

Within the media delivering news, people are more satisfied with the content levels provided by professional media channels (news on TV, online news) than with social media and content created by users online, except for printed news. For instance, for news accessed via television or radio, 57% of respondents indicated that the content meets their needs. 17% felt that there is too little content that aligns with their preferences, while 9% found the volume of content to be too much. For what concerns online news, a majority of 53% were satisfied with the amount of online news content available, finding it well-matched to their interests. However, 15% still felt that the content is lacking, and 13% found it excessive. **The results for printed news are particularly telling of the challenges faced by traditional media.** A significant 26% of respondents indicated that they are not interested in printed news, the highest level of disinterest among the categories surveyed. Despite this, 37% felt that the content provided is sufficient for their needs, 17% believed there is too little content to engage them and 9% found the volume of available printed news overwhelming.

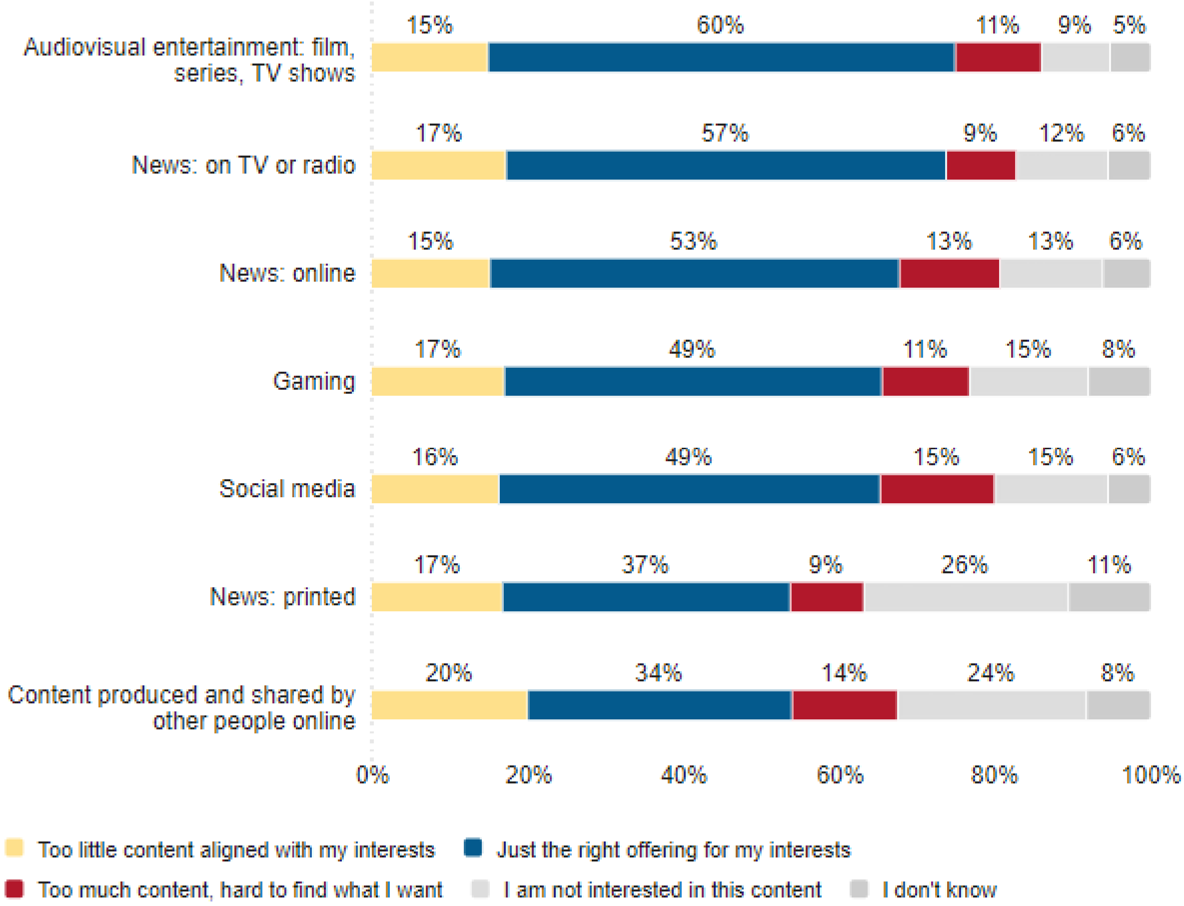
When considering all news media, the majority of respondents are generally satisfied with the content available. The aggregated results for news on TV or radio, online news and printed news show that nearly half of respondents (49%) believed the content is sufficient to meet their needs, while 16% felt there is too little and 10% feel there is too much. Notably, 17% expressed a lack of interest in news content altogether, a figure influenced significantly by perceptions of printed news, and almost 8% reported they do not know.[24]

When considering content produced and shared by other users online, the results were more polarised. While 34% of respondents felt that the content is sufficient for their needs, a significant 20% believed that there is too little relevant content. This category also had a relatively **high level of disinterest**, with 24% of respondents indicating no interest in user-generated content. 14% found the volume of content to be excessive.

In the realm of gaming, 49% of respondents believed that the gaming content available is adequate for their needs and 17% felt that there is too little content aligned with their interests. Conversely, 11% reported finding too much content. Similarly, to video games, **49% of respondents found the amount of social media content to match their needs**. 16% of respondents found the content to be too little and 15% to be too much.

[24] The overall figures are calculated by averaging the percentages across the three news categories (TV or radio, online, and printed news).

Question 4. For each of the following sectors, please indicate how well the content available on the services you use matches your needs. (n=21,501)[25]



2.1.2. Reasons to consume media

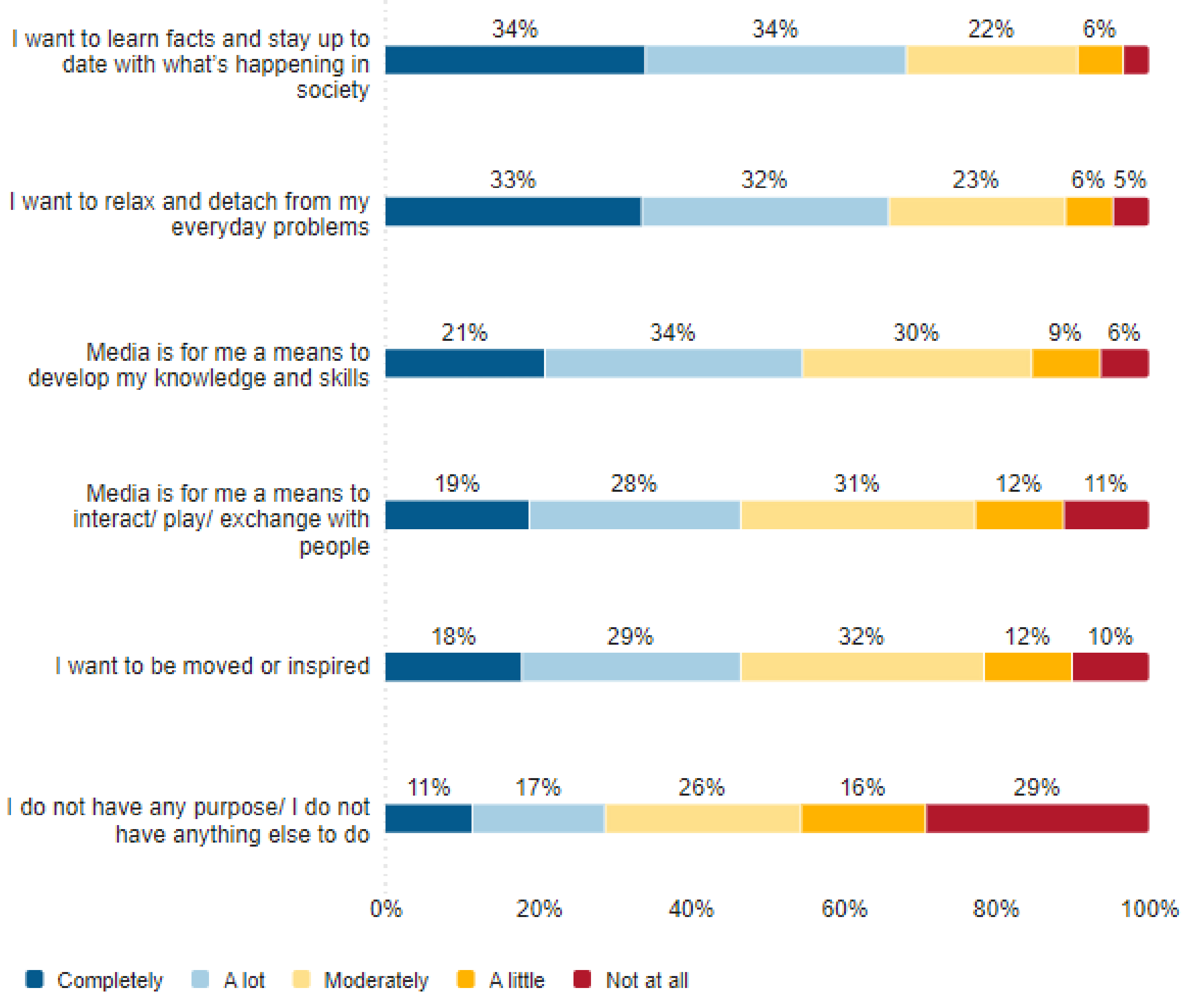
Media consumption priorities

Different functions of media are important for a large majority of people to some extent, confirming the important and multifaceted role of media in today's society.

When asked about what they look for in the media, 68% of **respondents place high importance on staying informed**[26]. **Relaxation and detachment are also highly valued** by 65%, showing that many use media as a means of unwinding and escaping daily stresses. Developing knowledge and skills through media is important for 55%, indicating that **educational content is a significant draw for many respondents**. Interaction and play through media are highly valued by 47% of respondents, indicating that **social engagement is a significant but secondary motivation for media use**. Similarly, the desire for inspiration through media is also preferred by 47%. Finally, the option "I do not have any purpose/I do not have anything else to do" receives 28% of preferences, suggesting that **most respondents consume media with a specific purpose rather than out of boredom or lack of alternatives**.

[25] This question was asked only to participants responding to questions on News consumption, but it is presented here as it has an impact across all sectors.
[26] This result may also stem from respondents interpreting the term "media" specifically as "journalism." However, this remains a hypothesis regarding a potential variation in how the question's wording was understood.

Question 5. In your free time, what do you look for in the media? Rate to what extent each option applies to you from "not at all" to "completely". (n=55,746)



Monthly spending for media consumption

When asked about household monthly spending in EUR across various media categories, the category with the highest expenditure is basic TV channels and their online services, where households spend an average of EUR 15.46[27]. If we exclude those who do not spend for this category, the average is EUR 23.1 for basic TV channels. This is followed by video games, which see an average spend of EUR 11.43 (EUR 17.8 excluding those not spending for video games), and bundle of services, with an average expenditure of EUR 11.16 (EUR 18.7 excluding the non payers). These telco bundles may cover internet access, phone, TV services, and other services, but the precise offer varies from company to company.[28] Possible overlaps in reported spending for bundles and other individual media categories are explained in Annex V. Research limitations.

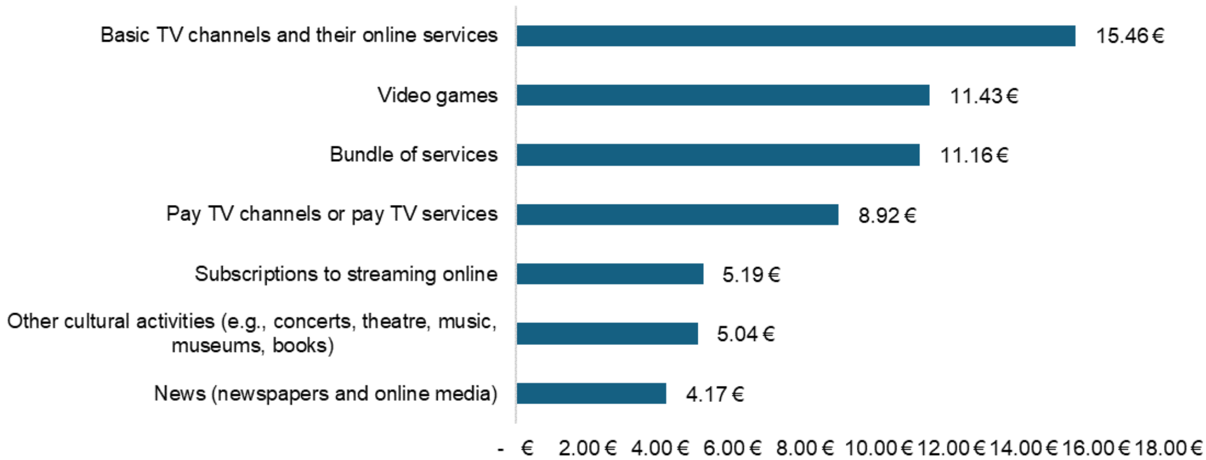
Spending on pay TV channels or pay-TV services averages EUR 8.92 (EUR 17.2 among the payers). In contrast, spending on subscriptions to streaming online is lower, averaging EUR 5.19 (16.8 among the payers), while spending on other cultural activities (e.g., concerts, theatre, music, museums, books) is EUR 5.04. The category with the lowest

[27] The following averages are calculated including also those respondents indicating a household's monthly expenditure equal to 0.
[28] This category is not mutually exclusive with others. Consumers may still choose to pay separately for pay TV or basic TV channels and services in addition to the bundles.

expenditure is news (newspapers and online media), with households spending an average of EUR 4.17 (EUR 12.6 among the payers). For this last category, excluding about 66% of respondents who reported not spending for news, the remaining 34% is divided as follows: 13% of respondents spend between 1 and 5 EUR, 7% of them spend between 6 and 10 EUR, and the remaining 14% spend more than 10 EUR a month.

Therefore, an average European spends approximately EUR 56.33 per month on various forms of media, based on the combined costs of all media categories and excluding expenditures on "other cultural activities". It should be noted, however, that the category "bundle of services" includes some of the other categories (e.g., Basic TV, Pay TV, Streaming services). Therefore, the overall average expenditure shall be considered as lower, based on the data. While significant overlaps in responses regarding the three TV related options are likely to overestimate the spending on traditional TV, the relative spending of different cohorts still reveals relevant trends about spending behaviour.

Question 6. Can you break down your household's monthly spending in Euros (€) into the following media categories? (n=54,459)[29]



Factors such as age, education, financial situation, and family dynamics significantly influence how much people pay for media services. Younger people and those with higher incomes or educational levels tend to invest more in digital and interactive media (e.g., video games, streaming services), whereas older generations and lower-income households lean towards traditional television services (e.g., basic and pay TV channels).

a) **Types of spending change depending on the age**. While the amounts spent on TV services in this paragraph should not be taken as very precise, due to the research limitations explained in Annex V. Research limitations there are still consistent broad generational trends that we can observe. Older individuals, particularly those aged 60 and above, spend more for news monthly: around EUR 6 compared to around EUR 3 for people aged 18-30. For what concerns **pay TV channels and basic TV channels and their online services**, spending decreases with decreasing age. The 60+ and 41-50 age groups spend the most on **pay TV** (EUR 10 each), followed by the other age groups (around EUR 8). Moreover, the 41-50 age group leads in **basic TV** spending (around EUR 17), with the 31-40 and 60+ age groups following (around EUR 16). The 18-30 age group

[29] 1,287 outlier answers were considered and not included in the graph if a value>EUR 100 was indicated for an answer option because deemed unrealistic. Responses not in EUR were converted with the exchange rate at the time of the analysis. For more info see Annex V. Research limitations.

reports the lowest expenditure in this category (EUR 13). Younger individuals, particularly those under 30, are more inclined to spend on **bundled services, though this cannot be taken as an indication of TV preference given that telecommunication services are often included in bundles and can also drive consumption**: they spend EUR 13 on average, compared to people older than 60 who spend EUR 9 on average. People aged 51-60 spend EUR 10, those aged 41-50 spend EUR 12 and those aged 31-40 spend EUR 13 on average. Meanwhile, spending on **streaming services** remains relatively consistent at around EUR 8 for the 18-30 and 31-40 age groups under, but drops significantly for older individuals (EUR 6 for those aged 41-50, EUR 3 for those aged 51-60 and EUR 2 for those aged over 60). This suggests that **older generations are more loyal to traditional TV services, while younger people gravitate towards digital platforms**. The younger generation (18-30) also leads in the video games monthly average spending (around EUR 13, compared to EUR 10 for those aged 60+).

b) **Individuals with higher education tend to spend more across all media categories**: news (EUR 6), pay TV (EUR 10), basic TV (EUR 18), bundled services (EUR 13), streaming (EUR 7), video games (EUR 15) and other cultural activities (EUR 6). In contrast, those with lower education levels report the lowest spending in nearly every category, respectively EUR 3, EUR 8, EUR 13, EUR 9, EUR 3, EUR 7 and EUR 4.

c) The **correlation between spending on media categories and financial situations** reveals distinct patterns across income groups. Individuals with a financial situation allowing them to meet their basic needs prioritise essential and leisure entertainment, with relatively high spending on basic TV (EUR 16) and video games (EUR 13), constituting 26% and 22% of their total media expenditure respectively. Conversely, spending on news is minimal (8% of their total spending, around EUR 4). Those with a comfortable financial situation allocate more evenly across categories, with the highest total expenditure and a preference for premium content, reflected in elevated subscription to streaming services spending (11%, EUR 8) and significant spending on bundle services (EUR 14). The group with an uncomfortable financial situation demonstrates constrained spending, with basic TV consuming the largest share (29%) of their budget, highlighting its importance, while subscriptions (8%) and news (6%) are less prioritised. Across income groups, higher earnings correlate with greater overall media spending, particularly in bundle services, subscriptions to streaming services, and video games, whereas lower-income households allocate proportionally more to basic TV and pay TV. These correlations are relatively weak (rho below 0.3), but statistically significant.

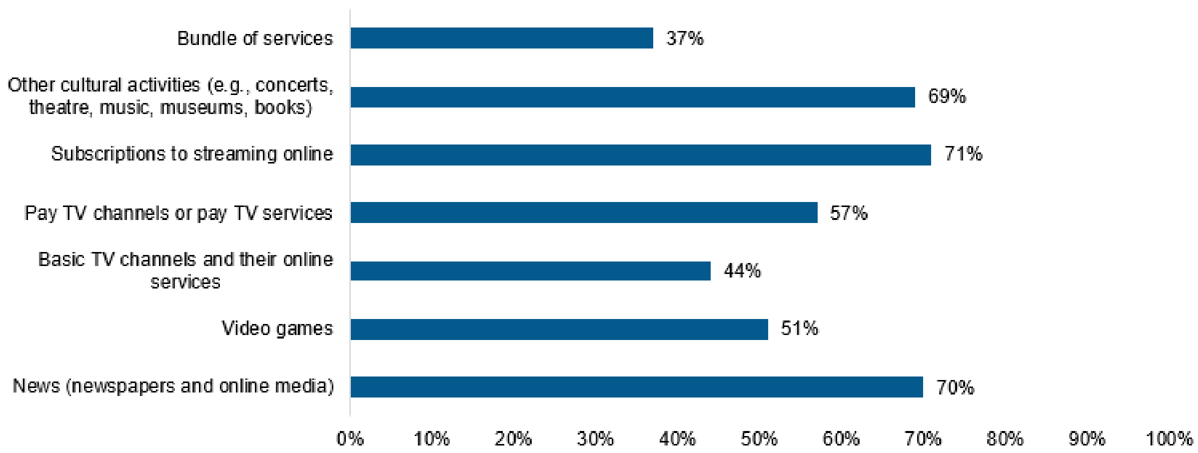
d) **Households with children tend to spend more across all media categories**, compared to those without children. In the case of news consumption, there is no significant difference between households. However, spending on pay TV is markedly higher in households with children, which spend EUR 7 compared to EUR 5 in households without children. Similarly, basic TV expenditure is greater in households with children, with an average spend of EUR 17 versus EUR 13. Bundle services follow the same trend, with households with children spending EUR 13 compared to EUR 9 for those without children. Streaming services also see increased spending in households with children (EUR 3) compared to those without (EUR 2). Finally, video game spending is higher among households with children, with an average spend of EUR 10 compared to EUR 9 in child-free households.

Living arrangements (whether in a city, town, or rural area) and motivations for consuming media show no significant differences in spending habits, as do employment status and media consumption habits in the last year. **Gender also doesn't play a significant role in influencing spending across media categories**.

The survey results indicate the percentage of respondents who reported spending EUR 0 across various media and cultural categories. In this way, we can also report the **average household's monthly spending among those who indicate they pay for the media service**.

- For **Basic TV channels** and their online services, 44% of respondents inserted a value equal to EUR 0 and 56% indicated they pay for these services, highlighting a significant portion of the sample engaging with traditional television. The average spending of those who pay for these services corresponds to EUR 23.1.
- In contrast, 57% reported not paying for **Pay TV channels** or pay TV services, contrary to 43% of respondents reporting paying for them, showing a slightly lower uptake and with an average spending of EUR 17.2 among the payers.
- The category with the highest proportion of expenditure was **Bundles of services**, with 63% of respondents paying for these comprehensive packages, which typically include internet, TV, and phone services, and an average spending of EUR 18.7 for them.
- When it comes to **streaming subscriptions**, a significant 71% reported no expenditure, while 29% of respondents reported any expenditure with an average spending of EUR 16.8, suggesting a lower penetration compared to traditional TV bundles.
- Meanwhile, **video games** saw 49% of respondents indicating spending with an average spending of EUR 17.8.
- For **news** (newspapers and online media), 70% reported paying EUR 0, contrary to 30% who mentioned paying for these services, pointing to a tendency for many to access free news content. Among those who spend on news, the average spending is EUR 12.6.
- Lastly, **other cultural activities**, such as concerts, theatre, museums, and books, were paid for by 31% of respondents, indicating a relatively modest investment in cultural experiences outside of media consumption.

Question 6. Percentage of household's indicating a monthly spending in Euros (€) equal to 0.



2.1.3. Further assessment of results

Media spending

While the findings provide valuable insights into media spending patterns across different groups, they should be interpreted with caution. As outlined in the research limitations (see Annex V. Research limitations), potential overlaps in reporting between spending on bundled services and standalone TV services may have led to overestimations in certain categories. These methodological challenges highlight the importance of considering these results as indicative rather than definitive.

The **correlation between average aggregate spending on media categories and media consumption habits** highlights distinct patterns among different types of media consumers. Those who engage daily or weekly with sports spend the most, averaging EUR 69 a month, suggesting a strong investment in media. Daily or weekly reality show watchers follow closely with EUR 66. Daily or weekly video games consumers spend an average of EUR 61. Daily or weekly music consumers' aggregate spending is on average EUR 60. Those who consume news and films daily or weekly both spend EUR 59. Meanwhile, daily or weekly social media users spend the least at EUR 58.

These spending patterns suggest a direct link between the intensity of media engagement and willingness to allocate funds. Different preferences result in different levels of expenditure with sport component increasing the overall spending.

Finally, there is no significant difference in average spending between groups of people reporting different motivations behind media usage.

Media trends and substitution effects

The analysis of media habits reveals that some forms of media consumption correlate with varying degrees of engagement across content types. Some interesting patterns are presented below.

a) **News consumption is strongly correlated with overall media habits**. People who frequently consume news (i.e., daily or weekly) are significantly more likely to engage with other media types compared to those who consume news less often. For example, 70% of frequent news consumers also report engaging with social media, 66% engage with music, and 63% consume films, series, and documentaries. On the other hand, **sports and reality TV were less commonly associated with daily or weekly news watchers**, with only 38% of them reporting sports viewing and 23% engaging with reality content.[30]
b) **People who play video games daily or weekly tend to have a lower than average interest in reality TV and sports,** with respectively 47% and 48% of them reporting regular viewing of these genres, compared to an average of 55% and 58%. However, daily or weekly **video gamers show engagement with news (over 74%), films, series and documentaries (78%), social media**

[30] The correlations between news consumption and engagement with other media types were statistically significant. News consumption and social media engagement showed a moderate positive correlation ($r = 0.34$, $p < 0.001$). News consumption and music engagement exhibited a weaker positive correlation ($r = 0.29$, $p < 0.001$). News consumption and watching films, series, and documentaries displayed a positive correlation ($r = 0.27$, $p < 0.001$). In contrast, correlations with sports consumption ($r = 0.14$, $p < 0.001$) and reality TV ($r = 0.11$, $p < 0.001$) were weaker, reflecting less association.

(84%), and music (77%), suggesting a preference for a more diverse and interactive media "diet".

c) The correlation between overall media consumption and audiovisual content consumption, such as cinema, streaming, and traditional TV, also reveals interesting patterns.

   - **Frequent cinema-goers** (i.e., those going to the cinema daily or weekly)**, for example, are engaged with news,** with 70% reporting regular news consumption, in line with the overall population (74% consuming news daily or weekly). Unsurprisingly, a significant portion of frequent **cinema-goers condume film, series and documentaries on a daily or weekly basis** (66%, similar to 69% of the broad population). However, **films, series and documentaries are also strongly preferred by those who play video gamers (78%) and consume streaming (75%) daily or weekly.** This suggests that even the most faithful cinema goers end up watching fewer films than streaming platforms' users and consumption of films might be larger for more "digitalised" profiles. Similarly, also many daily or weekly traditional TV watchers (71%) prefer films, series and documentaries. They are highly active on social media (79%) and enjoy music (73%), in line with the average population (respectively, 81% and 76%). In contrast, they have lower engagement with sports (51%) and video games (44%), but still higher than the broader population, with only 38% engaging with sports and 37% with video games daily or weekly.
   - **Daily or weekly streaming platform users exhibit slightly different habits**. They tend to be even more engaged with news (73%) and films, series and documetaries (75%) than frequent cinema-goers. In line with other citizens, reality TV and sports hold less appeal to them, with respectively only 32% and 37% of frequent streaming users watching these genres. They are also actively involved with video games (42%), social media (82%), and music (74%).
   - **Daily or weekly traditional TV channel consumers, while generally older than streaming or cinema audiences, show strong engagement with news (79%) and films, series and documentaries (71%).** Reality TV and sports are less popular within this group, with 36% and 42% reporting regular viewing of these categories. Interestingly, despite being associated with more conventional viewing habits, daily or weekly traditional TV viewers remain more engaged with social media (79%) and music (75%).

		Question A2: Thinking about watching films, series, news or other types of programmes, how often do you use the following services?																								
		Subscription streaming services					Online services offered by traditional TV channels in my country					Traditional TV channels as programmes are aired					Cinema					Other				
		Never or almost never	A few times a year	At least once a month	At least once a week	At least once a day	Never or almost never	A few times a year	At least once a month	At least once a week	At least once a day	Never or almost never	A few times a year	At least once a month	At least once a week	At least once a day	Never or almost never	A few times a year	At least once a month	At least once a week	At least once a day	Never or almost never	A few times a year	At least once a month	At least once a week	At least once a day
In the last year, how often did you: | Watch/ read/ listen to news	Never	16.1%	3.5%	4.8%	10.3%	11.3%	21.9%	4.4%	7.5%	5.1%	6.6%	17.7%	6.1%	4.6%	6.8%	9.5%	23.1%	11.6%	5.2%	3.4%	1.7%	24.7%	2.9%	3.6%	5.0%	3.5%
	Monthly	8.7%	5.1%	6.8%	9.7%	9.8%	11.9%	6.4%	8.6%	6.6%	5.4%	10.2%	7.9%	7.3%	7.6%	7.3%	11.9%	13.7%	7.5%	5.9%	1.6%	14.4%	4.2%	5.6%	6.3%	4.9%
	Weekly	8.3%	3.9%	6.4%	11.5%	10.1%	8.4%	5.7%	7.0%	12.2%	6.4%	5.9%	5.7%	6.9%	13.5%	7.2%	11.0%	12.7%	7.4%	6.0%	3.3%	11.9%	4.2%	6.0%	7.7%	3.4%
	Few times/ week	9.0%	2.5%	4.9%	11.3%	10.9%	9.8%	5.2%	7.3%	9.6%	6.0%	6.2%	4.2%	5.4%	12.3%	10.2%	10.9%	14.2%	7.6%	3.8%	2.1%	13.9%	4.1%	4.0%	5.6%	3.5%
	Daily	13.2%	2.5%	4.2%	10.9%	11.3%	11.1%	4.5%	6.1%	10.5%	9.1%	5.4%	3.2%	4.4%	11.2%	18.0%	14.9%	13.1%	8.2%	4.2%	2.1%	18.0%	3.1%	3.7%	5.1%	4.2%
In the last year, how often did you: | Watch films, series and/ or documentaries	Never	31.6%	4.1%	4.4%	5.6%	3.3%	24.2%	6.0%	6.6%	4.4%	7.3%	22.3%	7.8%	5.4%	7.2%	7.4%	30.8%	7.9%	3.7%	3.6%	3.6%	28.8%	4.7%	3.1%	3.5%	5.4%
	Monthly	15.9%	6.5%	8.0%	8.0%	3.1%	13.2%	7.3%	8.2%	7.1%	5.1%	8.3%	8.0%	8.6%	9.9%	7.0%	15.5%	15.8%	5.3%	3.3%	1.9%	17.4%	5.8%	6.1%	4.2%	3.1%
	Weekly	11.4%	3.1%	8.0%	14.0%	6.9%	12.6%	5.0%	7.4%	11.0%	6.2%	6.3%	4.4%	7.1%	12.5%	12.3%	12.8%	13.9%	7.8%	6.8%	2.1%	16.0%	3.3%	5.9%	7.6%	2.9%
	Few times/ week	11.5%	2.8%	4.4%	13.6%	8.4%	10.5%	4.4%	7.1%	11.1%	7.0%	5.7%	3.7%	5.4%	12.4%	13.5%	13.0%	13.7%	8.2%	4.1%	1.7%	16.4%	3.7%	4.0%	5.8%	3.5%
	Daily	8.6%	2.0%	2.9%	8.0%	18.1%	9.0%	4.7%	5.8%	9.5%	9.7%	5.8%	3.6%	3.1%	10.1%	16.8%	12.8%	12.4%	8.2%	3.7%	2.6%	15.3%	2.9%	3.1%	4.9%	5.0%
In the last year, how often did you: | Watch reality shows and/ or other entertainment shows	Never	19.6%	2.8%	3.7%	10.2%	10.2%	20.5%	5.5%	6.3%	7.5%	6.0%	13.7%	4.7%	4.9%	9.5%	14.0%	23.4%	13.7%	5.7%	3.0%	1.2%	26.9%	2.4%	2.6%	4.5%	2.9%
	Monthly	10.1%	3.5%	6.5%	10.7%	9.0%	10.1%	6.2%	7.7%	9.4%	5.8%	6.5%	5.6%	5.7%	11.3%	10.3%	12.5%	16.4%	6.5%	3.6%	1.1%	15.4%	4.5%	4.8%	4.0%	3.3%
	Weekly	10.1%	2.7%	5.0%	12.3%	9.8%	7.5%	4.5%	7.2%	11.9%	8.1%	3.2%	4.2%	6.1%	12.5%	13.7%	10.4%	13.8%	8.7%	4.7%	2.7%	12.9%	4.2%	5.5%	6.6%	3.9%
	Few times/ week	7.4%	2.4%	4.7%	11.5%	12.7%	7.4%	4.4%	6.1%	11.9%	9.3%	3.8%	3.1%	4.8%	12.3%	15.4%	9.9%	11.8%	9.3%	5.2%	2.8%	12.1%	3.4%	4.0%	7.6%	4.6%
	Daily	6.5%	3.4%	4.6%	9.2%	14.6%	6.0%	3.4%	6.7%	9.0%	10.5%	3.2%	3.2%	4.0%	10.4%	15.4%	8.2%	8.7%	9.6%	6.8%	4.3%	10.2%	3.2%	4.8%	5.1%	6.2%

In the last year, how often did you: | Watch sports	Never	17.5%	3.1%	4.6%	9.3%	10.6%	18.2%	5.3%	6.7%	7.8%	6.8%	12.4%	4.6%	4.2%	9.8%	14.4%	21.5%	13.5%	5.2%	2.9%	2.1%	23.9%	2.7%	3.7%	3.8%	3.4%
	Monthly	11.5%	3.3%	4.5%	10.7%	10.5%	11.2%	6.2%	7.7%	8.8%	5.6%	6.6%	6.0%	5.4%	10.6%	11.3%	13.2%	15.2%	7.6%	3.4%	1.1%	15.8%	4.2%	4.8%	4.4%	3.0%
	Weekly	9.6%	2.9%	5.1%	12.5%	9.7%	9.7%	5.3%	7.2%	10.3%	6.7%	4.6%	4.0%	6.2%	13.0%	12.6%	11.1%	13.7%	8.4%	5.0%	1.8%	14.9%	3.7%	3.7%	7.7%	3.4%
	Few times/ week	9.4%	2.5%	4.7%	12.2%	10.4%	8.2%	3.9%	6.3%	11.8%	8.1%	4.4%	3.3%	5.0%	11.8%	14.6%	11.8%	12.9%	8.5%	4.7%	1.9%	13.9%	3.4%	4.1%	5.9%	4.1%
	Daily	8.3%	2.7%	5.6%	9.4%	14.8%	6.8%	3.8%	5.8%	11.1%	12.7%	4.6%	3.5%	5.4%	10.7%	15.9%	9.2%	9.9%	9.7%	6.8%	5.0%	11.9%	4.0%	5.3%	6.6%	6.7%
In the last year, how often did you: | Play video games, including small games on your mobile	Never	27.9%	3.8%	7.2%	14.4%	10.9%	24.0%	7.0%	8.8%	13.2%	10.3%	12.3%	5.6%	6.9%	16.7%	23.8%	31.1%	18.9%	8.0%	5.1%	2.2%	34.6%	4.5%	4.5%	6.1%	4.5%
	Monthly	7.7%	3.3%	4.8%	10.0%	9.0%	7.4%	5.5%	7.2%	7.5%	6.4%	5.3%	5.0%	5.7%	8.8%	9.7%	9.2%	13.6%	6.6%	3.9%	1.5%	11.5%	4.0%	4.3%	5.6%	2.7%
	Weekly	5.2%	3.0%	5.0%	10.7%	10.1%	4.4%	4.0%	7.1%	10.2%	7.9%	3.9%	4.3%	5.6%	10.2%	9.2%	6.9%	11.9%	7.6%	5.5%	2.2%	9.0%	3.1%	6.1%	6.2%	3.7%
	Few times/ week	5.8%	2.2%	4.3%	10.2%	11.5%	6.7%	4.2%	5.8%	10.2%	6.3%	4.6%	3.9%	4.3%	10.6%	9.9%	6.6%	10.7%	9.2%	4.8%	2.5%	10.2%	3.6%	3.9%	5.8%	3.5%
	Daily	5.6%	2.4%	2.9%	8.7%	11.8%	7.7%	3.8%	5.1%	7.6%	6.7%	5.0%	3.0%	3.7%	8.1%	11.3%	8.6%	10.4%	6.9%	3.1%	2.3%	10.4%	2.6%	3.0%	4.6%	4.6%
In the last year, how often did you: | Social media	Never	32.6%	3.0%	3.1%	8.6%	5.7%	26.3%	5.5%	7.6%	6.9%	5.7%	12.3%	4.3%	5.6%	12.9%	19.6%	31.5%	14.0%	4.9%	2.7%	1.3%	35.5%	2.5%	2.8%	3.7%	2.3%
	Monthly	16.5%	5.9%	7.2%	8.2%	5.2%	12.0%	8.9%	8.3%	7.9%	5.7%	8.2%	5.4%	8.5%	10.7%	11.0%	17.6%	10.5%	6.3%	6.3%	2.6%	16.0%	5.5%	5.8%	5.9%	4.6%
	Weekly	12.2%	4.8%	7.4%	12.6%	8.1%	11.0%	5.5%	9.0%	11.3%	7.9%	4.9%	4.4%	7.0%	15.6%	13.0%	15.2%	11.5%	8.4%	7.5%	2.8%	15.9%	3.6%	6.2%	9.6%	3.7%
	Few times/ week	10.7%	2.2%	6.1%	11.6%	8.2%	10.4%	3.8%	6.4%	11.9%	6.3%	4.4%	3.3%	5.2%	11.3%	14.3%	12.7%	10.7%	7.4%	5.9%	2.7%	14.8%	3.1%	5.0%	6.7%	4.1%
	Daily	9.3%	2.6%	4.3%	11.0%	12.7%	9.8%	4.8%	6.4%	9.8%	8.2%	6.7%	4.4%	4.7%	10.5%	13.2%	11.8%	14.1%	8.1%	3.7%	2.1%	15.1%	3.6%	3.8%	5.0%	4.1%
In the last year, how often did you: | Listen to music	Never	23.2%	5.4%	4.4%	6.2%	5.9%	21.6%	5.6%	6.6%	5.8%	4.7%	14.7%	4.8%	4.3%	8.7%	15.5%	29.4%	7.8%	4.2%	4.3%	2.2%	30.0%	3.6%	1.7%	2.4%	4.1%
	Monthly	16.7%	4.4%	6.9%	9.3%	6.9%	13.6%	7.1%	7.5%	9.2%	5.2%	6.4%	5.6%	6.2%	11.2%	13.6%	18.6%	11.3%	5.9%	7.3%	1.5%	19.3%	3.8%	6.1%	4.7%	3.6%
	Weekly	12.6%	4.5%	6.2%	12.5%	8.7%	10.3%	5.0%	8.2%	11.5%	8.9%	5.1%	6.1%	6.4%	13.1%	13.5%	17.0%	12.4%	7.1%	4.2%	3.6%	16.8%	3.0%	5.3%	8.6%	3.6%
	Few times/ week	12.4%	2.8%	4.6%	11.0%	9.2%	11.3%	4.3%	6.5%	10.5%	7.2%	5.8%	3.7%	5.1%	11.6%	14.2%	14.6%	13.2%	6.7%	3.7%	1.9%	16.4%	3.4%	3.7%	5.6%	3.9%
	Daily	9.3%	2.2%	4.4%	11.1%	13.1%	10.1%	4.9%	6.5%	9.7%	8.1%	6.8%	3.9%	4.9%	10.8%	13.4%	10.7%	14.1%	8.9%	4.5%	2.1%	15.0%	3.7%	4.2%	5.2%	4.1%

While media consumption patterns are shifting, **many individuals are not necessarily substituting one media type at the expense of others.** Instead, there appears to be an overall broadening of media engagement, with **increases across multiple media types**, particularly in digital platforms (e.g., social media). Traditional content, such as news and sports, also remain highly relevant, indicating a growing diversification in consumption habits.

a) For individuals who watch **films, series and documentaries daily or weekly,** between 28% and 33% reported an increase in their consumption of news, films, series, documentaries, and music. A smaller portion (24%) indicated an increase in their engagement with sports content, while 19% devoted more time to video games and 15% to reality TV. When asked about the decrease in media consumption, 16% reported a decrease in their news consumption. Reality shows saw a notable reduction for 26%, while sports and video games decreased for 19% and 20%, respectively, and music consumption reduced for 12%. Social media saw a reduction for 11% of frequent films, series and documentaries consumers.
b) Among those who **listen to music daily or weekly,** 35% have increased their music consumption. At the same time, 30% also reported an uptick in their consumption of news and film-related media. Sports engagement rose by 26%, video game use by 18%, and reality TV consumption by 15%. For those who primarily listen to music, 17% reported a reduction in their news consumption. Film, series and documentaries consumption reduction was reported by 14%, while reality shows experienced the largest decline, for 28%. Sports dropped for 20%, video games for 21% and social media for 11% of frequent music listeners.
c) For those who consume **news on a daily or weekly basis,** 32% increased their news intake, while 30% boosted their music consumption. Approximately 28% reported an increase in both film and social media consumption, followed by a 25% rise in sports, a 16% increase in video game use, and a 13% increase in reality TV viewership. Concerning responses about reduction, film, series and documentaries consumption saw a 13% drop, while reality shows fell by 26%. Reductions in sports and video games were both around 19%. Social media decreased by 11%, while music declined by 12%.
d) Regarding **daily or weekly viewers of reality TV,** between 35% and 38% reported increasing their consumption of news, film content, social media, and music. A significant 28% also increased their engagement with sports and reality TV content, and 24% expanded their video game activities. 16% of reality shows frequent consumers reported a reduction in news consumption. Film consumption decreased for 12%, and sports saw a decline for 21%, the same for video games. Social media had the smallest decline, only for 10%, with music seeing a 13% decrease for reality TV consumers.
e) For **daily or weekly social media users,** between 30% and 33% reported an increased consumption of news, film media, social media, and music. In this group, 24% noted an increase in sports consumption, while 19% devoted more time to video games and 15% to reality TV. Among social media users, 17% reduced their news consumption, 14% their film, series and documentaries consumption and 27% reality shows. Sports and video games both decreased for 20%, while music dropped for 12% of social media frequent users.
f) Among **those who watch sports daily or weekly, 41%** increased consumption in watching sports. Additionally, between 32% and 35% of these individuals reported increased consumption of news, films, social media, and music. Video

game usage rose by 20%, while 17% reported a higher engagement with reality TV. For sports frequent viewers, 13% reduced their news consumption, and the same percentage reduced films, series and documentaries consumption. Reality shows experienced a reduction for 28% and video games dropped for 21%. Social media usage fell for 12%, and music saw a reduction for 12% of frequent sport watchers.

g) Among **daily or weekly video game users,** between 33% and 36% reported increased consumption of films, video games, social media, and music. Approximately 29% increased their news consumption, while 17% showed greater engagement with reality TV. 18% of the same group reduced their news consumption, 13% their film, series and documentaries consumption and 28% their reality shows consumption. Sports decreased for 18%. Social media fell for 11%, and music was reduced by 13% of frequent video gamers.

One of the most prominent patterns is that regular consumers of different media categories report an **increase in their consumption across all other media categories.** For instance, people who watch AV content (i.e., films, series and documentaries) daily or weekly also report increased consumption of news, music, and even sports. In general, **social media, AV content, news and music are witnessing growth in consumption**. Moreover, there is a significant amount of crossover in media consumption. For example, weekly film and series viewers are also showing increased engagement with music and news, while regular news consumers are diversifying their media habits to include more AV and social media content.

2.2. Audiovisual entertainment consumption trends

2.2.1. Overall consumption trends

In this chapter, some findings from a 2022 consumer survey on audiovisual consumption, conducted for the previous edition of the Outlook, are also presented where relevant and comparable to further contextualise the results and show trends when applicable.

TV services expenditure in the last 12 months

Respondents show a diverse range of traditional TV service subscriptions. **The most common subscription is to a standard or basic package of traditional TV channels**, with 39% of respondents subscribing to this option, showing a decrease compared to the previous outlook on AV media consumption (53%).[31] Subscriptions to premium TV channels show an increase both regarding films or series, sport, children's and other type of channels, which are respectively subscribed to by 26%, 14%, 8% and another 8% of respondents (previous survey results were respectively 8%, 5%, 2% and 2%[32]). 21% of respondents indicated that they did not pay for any TV service, opting instead for free TV, compared to 25% responding to the previous edition. This distribution suggests a still-existing **preference for standard cable/satellite TV packages, with one-fifth of the population relying on free-to-air services.**

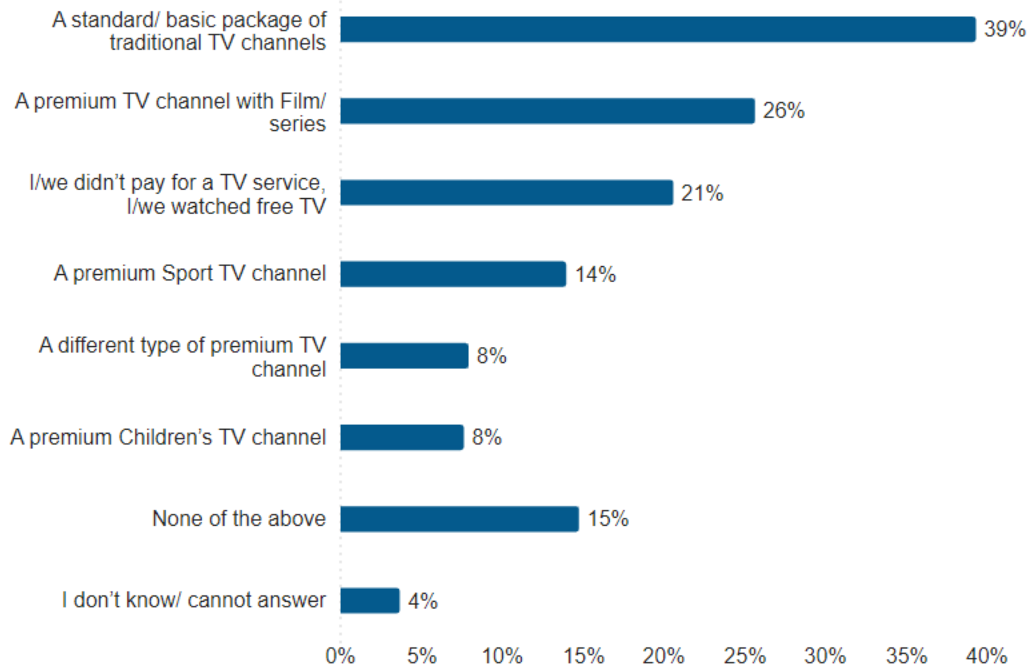
The differences between the results of the current survey, market data, and those of the previous outlook are examined further in Annex V. Research limitations.

Individuals with higher education are more likely to subscribe to premium services, particularly those offering films and series, with 21% of this group opting for such channels compared to 20% among medium-educated and only 16% among lower-educated respondents. Higher-educated individuals also show a slightly higher preference for sports channels (13%), compared to medium-educated respondents (10%) and lower-educated respondents (7%). Another notable difference is the proportion of respondents who rely solely on free TV. Among lower-educated respondents, 20% report watching only free TV services, whereas this figure drops to 16% for medium-educated and 12% for higher-educated respondents.

[31] European Commission: Directorate-General for Communications Networks, Content and Technology. (2023). *Consumer survey on consumer behaviour and preferences related to the consumption of audiovisual entertainment content: final report*. Publications Office of the European Union. https://data.europa.eu/doi/10.2759/55576

[32] Summing foreign language channels, which was not present in the current survey, to other types of channels.

Question A1. Which traditional TV services, if any, have you or someone else in your household regularly paid for in the past year? (n=22,703, 1.41 average clicks)



TV, streaming and cinema services

This question is an amended version of a corresponding question from the 2022 Consumer Survey.[33] While the previous question asked only about watching films and series, this question was expanded to all programming. There were some other smaller changes in the options, but overall, the questions were similar enough to allow for an approximate comparison of overall trends in the popularity of different services (if not precise numbers).

Regarding the frequency of use of different services, **watching traditional TV as programmes are aired is the most common practice**, with 58% of respondents watching it daily or weekly, in line with the results of the previous consumer survey (58%). 22% watch it less often, monthly or a few times a year. 20% never or almost never watch TV in this manner.

Subscription streaming services are also used frequently, with 50% using them daily or weekly, similar to respondents of the last version of the survey (49%). A smaller portion, 18%, use these services monthly or a few times a year, and 32% of respondents never or almost never use subscription streaming services or are not familiar with them.

Online services provided by traditional TV channels are used less frequently, with only 41% using them daily or weekly. While this is 5 percentage points more than in the 2022 survey, it should be noted that the 2022 survey only asked about free services, while the present survey also included subscription streaming services offered by traditional broadcasters.

Cinema attendance is much less frequent, with 15% of respondents declaring to be going to the cinema one or more times a week. These results are slightly above those of

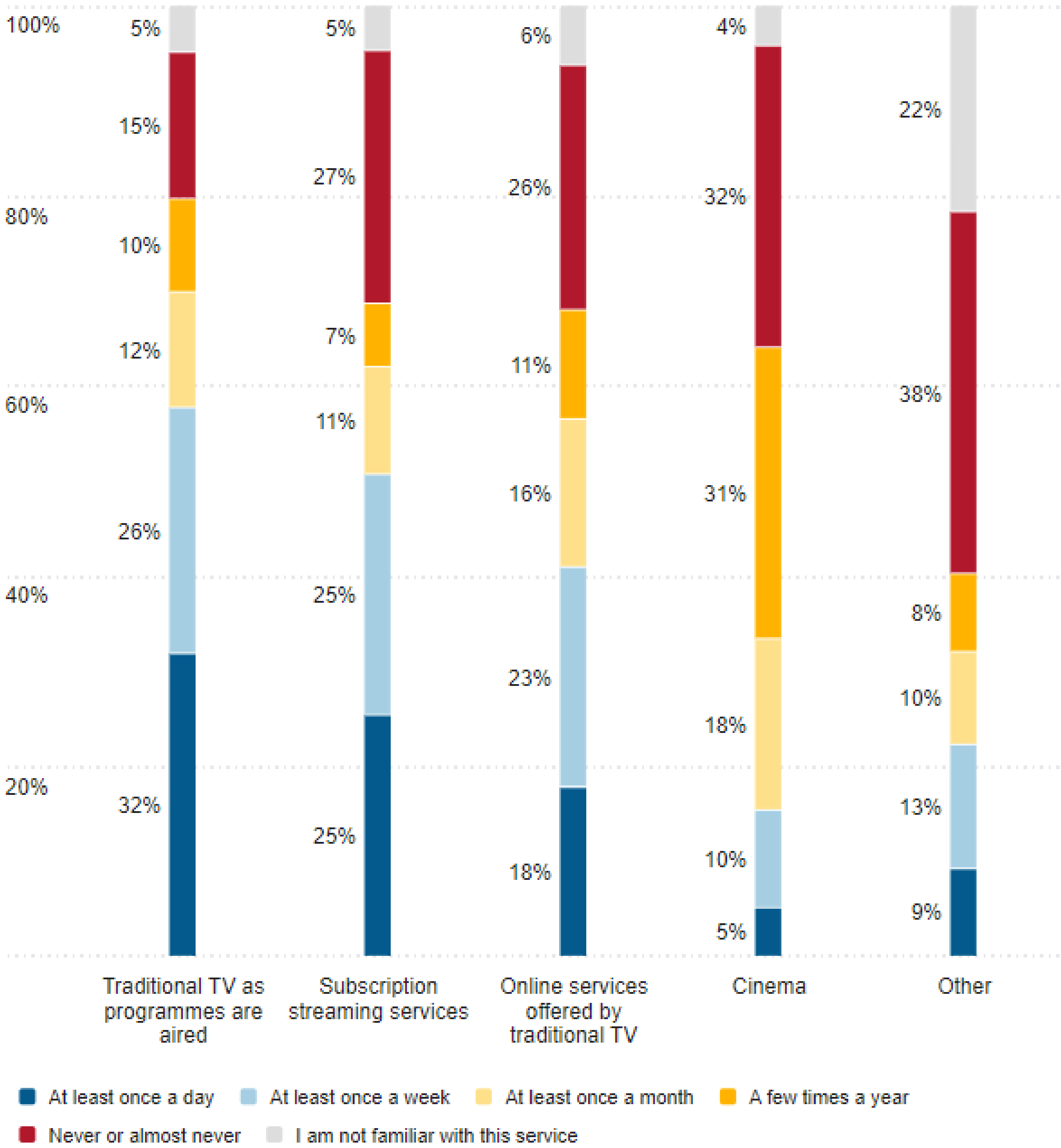
[33] European Commission. (2023). *Consumer behaviour and preferences related to the consumption of audiovisual entertainment content: Survey results*. Publications Office of the European Union. Available at: https://data.europa.eu/doi/10.2759/55576

the previous consumer survey done just after COVID lockdowns, where 9% declared going to the cinema daily or weekly (please see Annex V. Research limitations for further investigations on this result). A larger portion, 49%, attend monthly or a few times a year. Notably, 36% of respondents never or almost never visited the cinema.

For what concerns cinema consumption, there are patterns based on place of residence. **Among individuals who reported attending the cinema on a weekly basis, only 12% reside in rural areas, 26% in towns and 61% in cities**. This suggests that **living in rural areas may be associated with lower levels of regular cinema attendance**, potentially due to factors such as accessibility, availability of cinemas, or differing entertainment preferences compared to urban dwellers.

22% of respondents chose the option that they use “Other services” daily.   18% use these services monthly or a few times a year.

Question A2. Thinking about watching films, series, news or other types of programmes, how often do you use the following services? (n=22,703)[34]

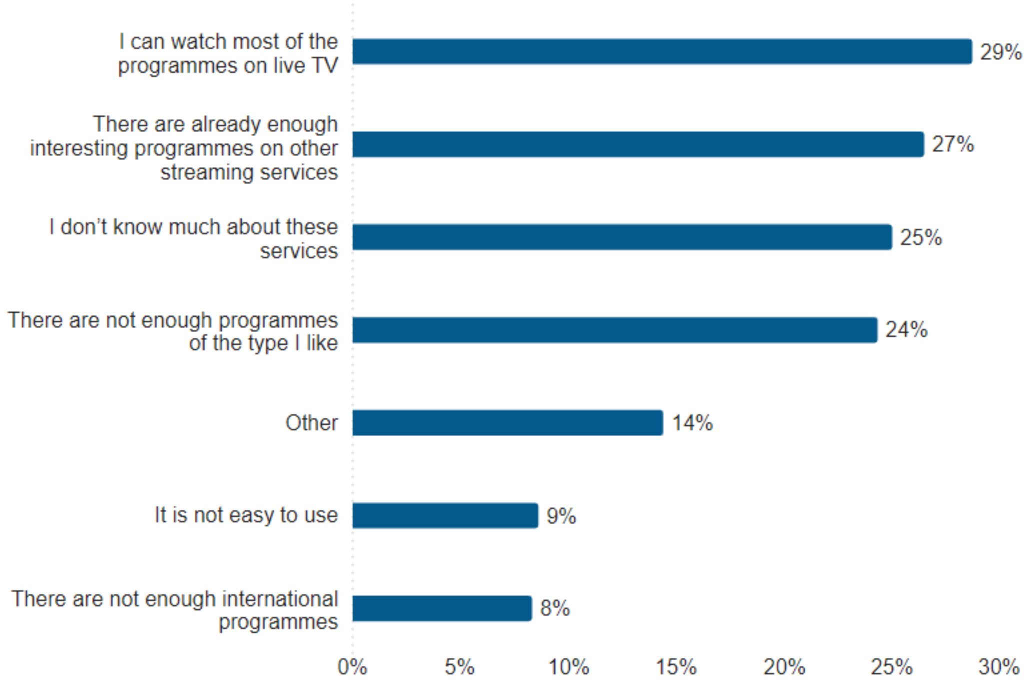


Respondents cite various reasons for not using online services offered by traditional TV channels. The most common reason, selected by 29%, is that they can watch most of the programmes on live TV. Another 27% feel that there are already enough interesting programmes on other streaming services. A similar proportion, 24%, believe that there are not enough programmes of the type they like available on these services.

[34] Combining the results for "Traditional TV as programmes are aired" and "Online services offered by traditional TV" allows for a summary of findings for "traditional TV overall". When combining both categories (i.e., counting for those consuming both accounted for once, those consuming only traditional tv and those consuming only online services), approximately 70% of respondents report using traditional TV at least once a day or at least once a week, while a total of 90% engage with traditional TV to some extent (including at least once a month or a few times a year). In contrast, around 10% of respondents report they never or almost never"use traditional TV or to not being familiar with these services.

Lack of awareness about these services is a barrier for 25% of respondents, while 9% find the services not easy to use, and 8% think there are not enough international programmes available.

Question A3. Which of the following, if any, are reasons why you have not watched films or series in the past year via an online service offered by traditional TV channels in your country? Please select at most 3 options. (n=6,460, 1.62 average clicks)[35]



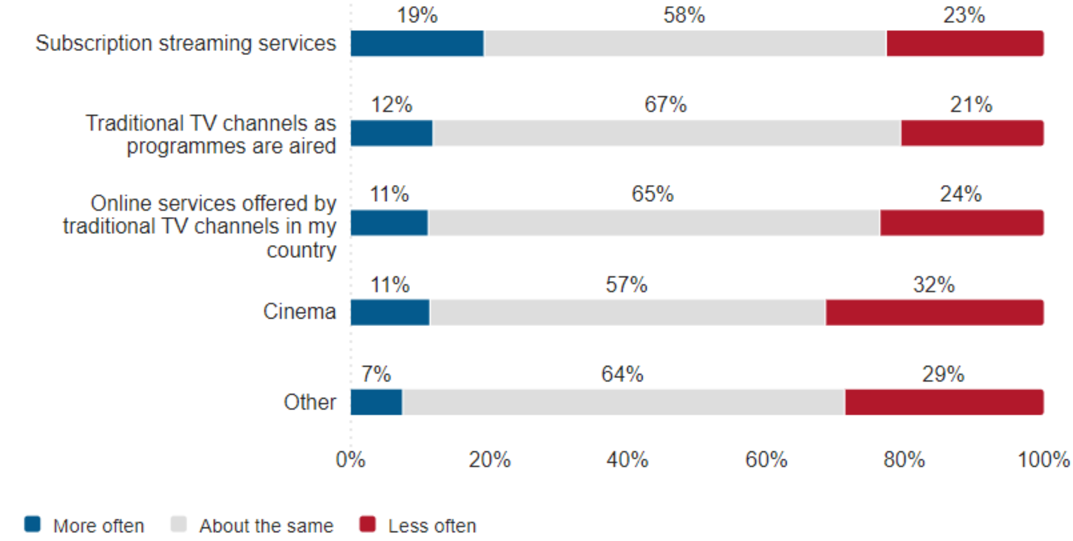
Overall, **respondents are planning to maintain their habits unchanged in the coming year** with respect to the way they watch programmes on different services/platforms. At the same time, there is a generally declining trend in the frequency of watching films or series across different viewing platforms, as respondents anticipate watching less often in the coming year. Subscription streaming services are expected to maintain their popularity or possibly mark a slight decline with 19% planning to use them more frequently and 23% intending to use them less, indicating a slight net decrease in usage in the following year. Traditional TV channels and online services from domestic TV providers show a sharper downward pattern, with only 12% and 11% respectively planning to watch more often, while 21% and 24% expect to watch them less. Cinema attendance faces the most significant anticipated decline, with 32% of respondents planning to go less often and only 11% expecting to go more.

These findings are different from the 2022 consumer survey, when responses overall indicated an overall increase in expected consumption of all the above services in the year following the survey.

With regard to cinema attendance, there is a declining trend too, as in the 2022 survey 27% of respondents anticipated going to the cinema more often and 23% less often. These results also need ot be assessed in the context of the impact of the COVID pandemic on cinema.

[35] Question asked only if answer "Never or almost never" or "I am not familiar with this service" was selected in question A2.

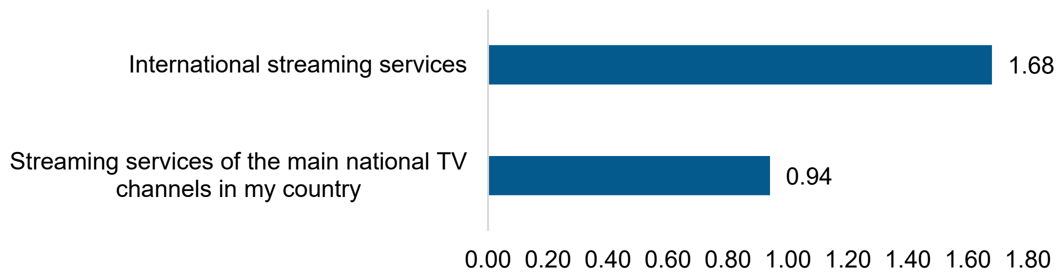
Question A4. And considering how often you will be watching films or series in the coming year, do you think that you will do each of the following activities less often, about the same amount, or more often in the coming year? (n=22,703)



Streaming services subscriptions

On average, **households declared subscribing to slightly more international streaming services**, with an average of 1.68 services, compared to 0.94 national TV streaming services.[36] If we exclude those respondents that reported a value equal to 0, the average number of services increases to 2.79 for international streaming services and 2.42 for national TV streaming services.

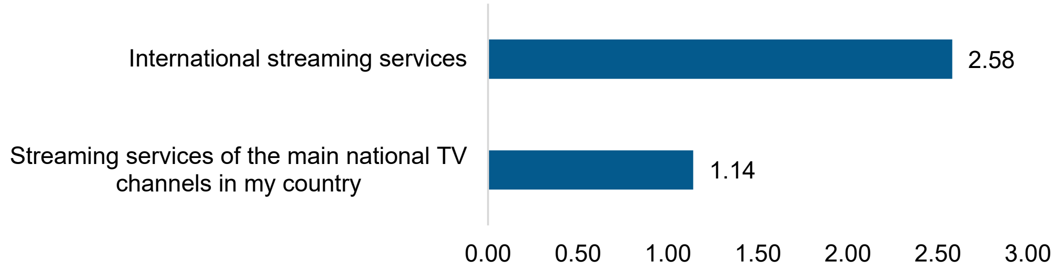
Question A5. How many services are you paying regularly to watch films and series online? (n=22,703)



For those who use streaming services at least once a day or at least once a week, the average number of subscriptions increases slightly, with 2.58 international streaming services and 1.14 national TV streaming services.

[36] Outlier responses (n=1,715) were excluded from the graph when an answer option indicated more than 10 subscriptions, as this was considered unrealistic.

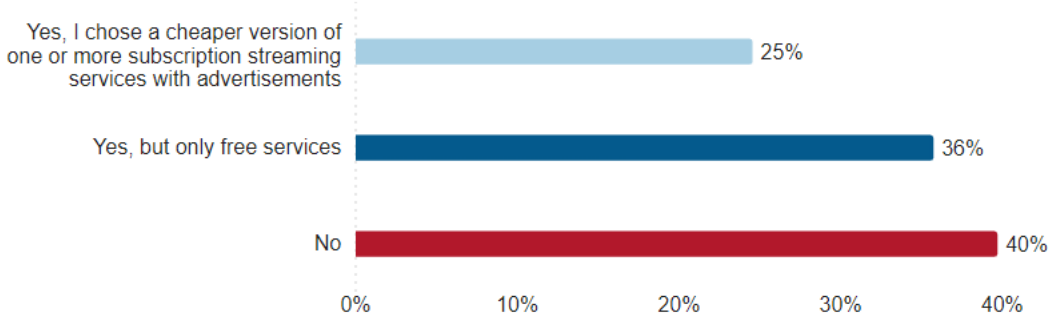
Question A5 for those who use streaming services at least once a week. (n=9,460)



Streaming services advertisement preferences

Respondents show a **mixed attitude towards ad-supported streaming services**. While 40% declare that they do not use these services, these include the respondents who do not use streaming at all. 36% of all respondents use free services with advertisements. A further 25% opt for cheaper versions of subscription services that include advertisements.

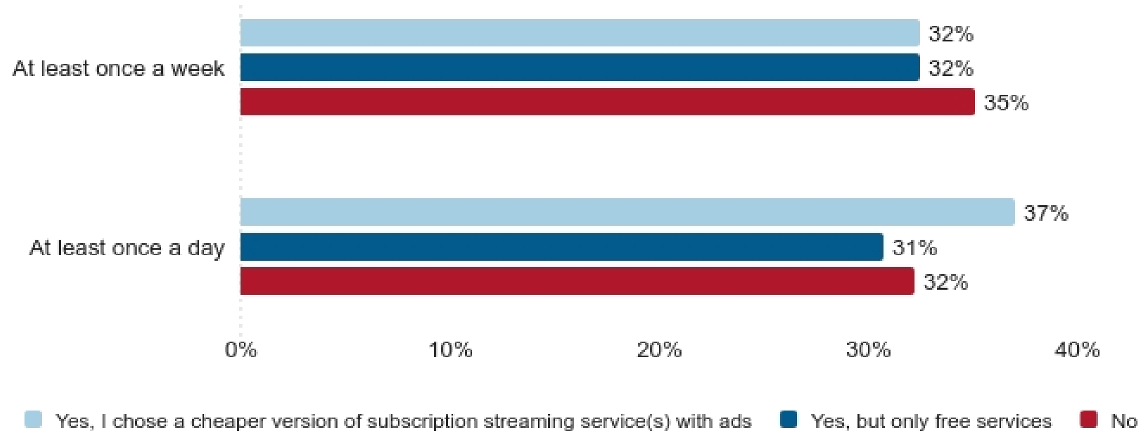
Question A6. As you may know, there are more and more streaming services that are cheaper, or even free, with advertisements. Do you already use such streaming services with advertisements? (n=22,703)



Among respondents who use subscription streaming services at least once a week, 32% opted for cheaper versions of subscription services with advertisements, while this percentage increased to 37% for those who use streaming services daily. In terms of using only free services with advertisements, the data shows that 32% of weekly users chose this option, compared to 31% of daily users. Lastly, 35% of weekly users indicated that they do not use advertisement-based services, a figure that is marginally lower at 32% among daily users.

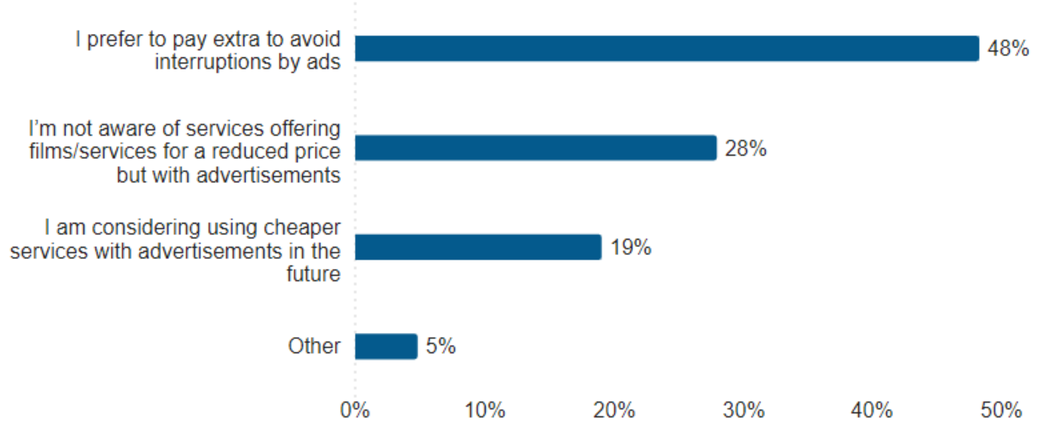
This suggests that a significant proportion of respondents are inclined towards using cheaper or free streaming options with advertisements, with daily users showing a higher tendency to select cheaper subscription-based services. However, the relative majority of those who use streaming services at least once a week still do not use streaming services with addvertisements.

Question A6 for frequent users of streaming services. (n=11,579)[37]



Among those who avoid streaming with advertisements, the relative majority (48%) prefer to pay extra to avoid interruptions by ads. 28% are not aware of services offering reduced prices in exchange for advertisements. A smaller group, 19%, are considering using cheaper services with advertisements in the future, while 5% selected "other" reasons.[38] This suggests that **the main barrier to ad-supported streaming is a strong preference for uninterrupted viewing**.

Question A7. You said that you don't stream films and series with advertisements. Why? (n=8,757)[39]



Among those who stream at least once a week, 41% prefer to pay more to avoid ads, while this figure rises to 43% for those who stream daily.

Some respondents were simply unaware of cheaper, ad-supported services. For those who stream at least once a week, 32% reported not knowing about these options, compared to 23% of daily streamers who were unaware.

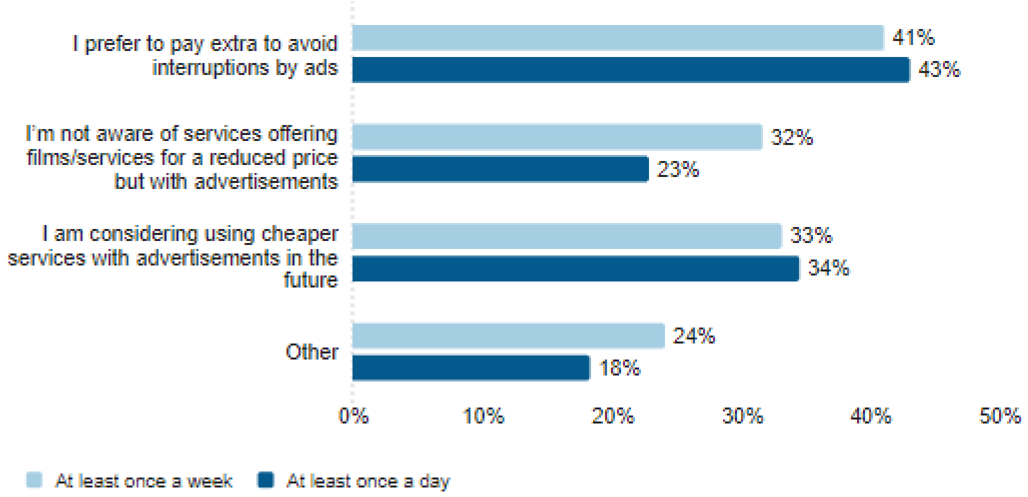
[37] The graph shows responses of who answered "At least once a day" or "At least once a week" in question A2.
[38] For question A5b, analysis of open-text responses from those selecting "Other" shows that reasons for not streaming films and series with advertisements include a lack of interest in films, unawareness of such options, and aversion to paying for services that still show ads. A few respondents expressed uncertainty or cited having too many existing subscriptions as reasons.
[39] Question asked only if answer "No" was selected in question A6.

There is also an indication that many are considering switching to cheaper, ad-supported services in the future. Among weekly streamers, 33% are contemplating this shift, slightly less than the 34% of daily streamers who are also considering it.

A smaller proportion selected "Other" as their reason for avoiding ad-supported services, with 24% of weekly streamers and 18% of daily streamers falling into this category.

Overall the results among the frequent users of streaming indicate a higher propensity to accept ads than in the general population.

Question A7 for frequent users of streaming services. (n=3,707)[40]

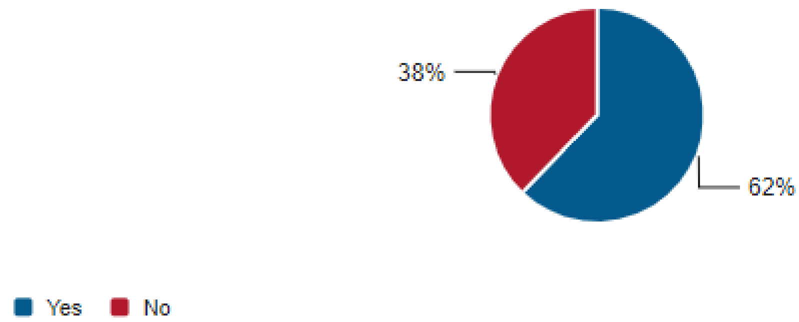


Among those who already chose streaming services with advertisements, the majority of respondents (62%) believe they will continue to stream more films and series with advertisements in the future, while 38% do not expect to do so. This indicates a **growing acceptance of ad-supported streaming as a viable option, though a significant portion of respondents still prefer ad-free experiences**.

Younger individuals are more accepting of ad-supported streaming models, while older respondents are increasingly resistant. Particularly those aged 18-30 and 31-40, display the highest openness, with, respectively, 69% and 67% indicating they would stream more films and series with ads in the future. A similar proportion is observed among those aged 41-50. However, this willingness declines with age, dropping to 57% among those aged 51-60, and further to 49% for respondents over 60, where a majority express reluctance.

[40] The graph shows responses of who answered "At least once a day" or "At least once a week" in question A2.

Question A8. Do you think you will stream more films and series with advertisements in the future? (n=13,946)[41]



TV and streaming service substitution effects

A significant portion of respondents (45%) have seriously considered or have already switched to a cheaper TV subscription in favour of streaming services. In contrast, the majority, 55% have not done this and are not considering it.

Similarly, 39% of respondents have either already cancelled their TV subscriptions or have seriously considered doing so in favour of streaming services. However, 61% have not made this switch and are not considering it.

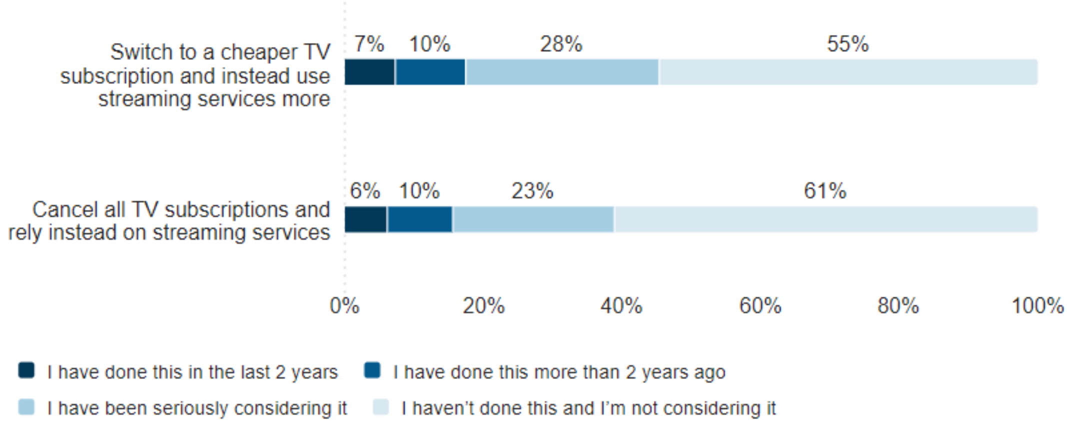
Compared to the 2022 consumer survey, more respondents are considering switching to a cheaper subscription or cancelling their TV subscriptions altogether in favour of streaming, but the difference is not striking (less than 5 percentage points). It should be noted that this question was asked to all respondents in this survey whereas in the 2022 survey, the base was limited to existing subscribers to traditional TV services.

It appears that **44% of individuals with a more comfortable financial situation are likely to cancel their TV subscriptions to rely only on streaming services, against, respectively, 38% and 36% of those with an uncomfortable situation and those who are able to meet their daily needs.** This suggests that financial capability alone can be one of the reasons, among others, in deciding whether to keep or cancel a traditional TV service.

Question A9. Thinking about the TV services you or someone else in your household subscribes to, both standalone or as part of a package including also

[41] Question asked only if answer "No" was not selected in question A6.

internet or phone, which of the following have you done or considered? (n=22,703)



Streaming services preferences

The table below presents the relative importance scores of various factors influencing streaming service preferences calculated from a MaxDiff question. Higher scores indicate greater significance, with the average score anchored at 100 as a baseline. Scores above 100 suggest that a factor is more influential than average in shaping user choices, while scores below 100 indicate lower relative importance.

The analysis highlights two factors as significantly more important than the others:

a) **Selection of films/series**: With a score of 210, this factor is approximately 110% more significant than the average, indicating its critical role for users.
b) **Attractive price/promotion**: Scoring 144, this factor is 44% more important than the average, ranking as the second most influential factor.

These two factors stand out as being the most influential in determining user preferences. The other factors, such as the inclusion in a TV/internet package and selection of other content types, fall below the baseline, showing relatively lower importance.

With respect to the findings of the previous outlook on AV media consumption,[42] the current findings reveal both similarities and slight shifts in the factors influencing user preferences. As in the previous outlook, the selection of films and series and price are the two main reasons to subscribe to a new streaming service. However, the inclusion of the TV package and the selection of sports events ranked lower. Similarly to current findings, friends and family also having a subscription and the selection of other content also ranked among the least favoured options.

Question A10. What would typically be the main reasons for you to subscribe to a new video streaming service? (n=22,703)

Feature	Relative importance
Selection of films/series	210
Attractive price/promotion	144

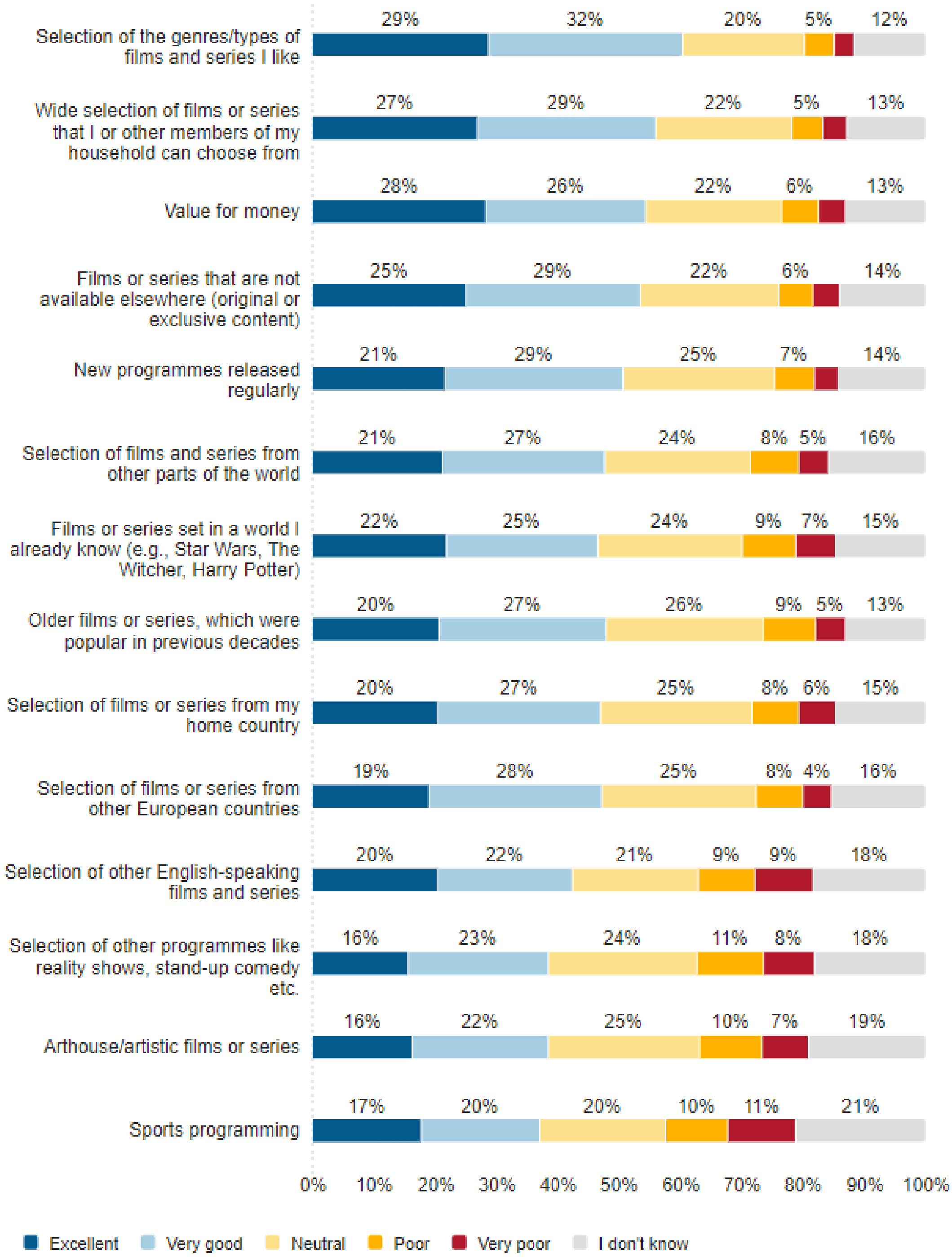
[42] European Commission: Directorate-General for Communications Networks, Content and Technology, (2023).
Consumer survey on consumer behaviour and preferences related to the consumption of audiovisual entertainment content: final report. Publications Office of the European Union. https://data.europa.eu/doi/10.2759/55576

Included in my TV/internet package	90
Selection of sports events	62
My friends/family have a subscription	48
Selection of other content (e.g., cooking, talent, dating shows)	45

Respondents generally rate their preferred streaming services positively across several aspects. **The wide selection of genres, value for money, the selection of films and series and the availability of exclusive content are particularly well-rated**, with more than 50% of respondents rating these aspects 5 or 4. The offer of national, non-national European content and content from other parts of the world is also viewed positively (around 19-21% of respondents assessed it as "excellent" and 27-28% as "very good"). The English-language offer of other films and series was rated only slightly lower, with 20% of respondents who assessed it as "excellent" and 22% as "very good". The selection of sports programs, other programs such as reality shows, and stand-up comedies and arthouse/artistic content have received relatively lower scores. This indicates a **high level of satisfaction with the range and quality of content available on streaming services**. Interestingly, there was not significant difference between preferences of people living on their own or with other adults or children.

When comparing those who frequently use streaming services—defined as streaming at least once a week or daily—with those who rarely stream, typically a few times a year or at least once a month, **frequent users tend to rate streaming services more positively across most aspects.** Frequent users are significantly more likely to give higher ratings for categories such as the selection of genres/types of films and series they like (38% rate it as excellent vs. 26% among rare users), wide selection of films/series (36% vs. 22%), and value for money (34% vs. 25%). They also show greater appreciation for original or exclusive content (34% excellent vs. 20%) and new programs released regularly (29% excellent vs. 21%).

Question A11. Considering your preferred streaming service, how would you rate the following aspects of their services on a scale from 1 (poor) to 5 (excellent)? (n=22,703)



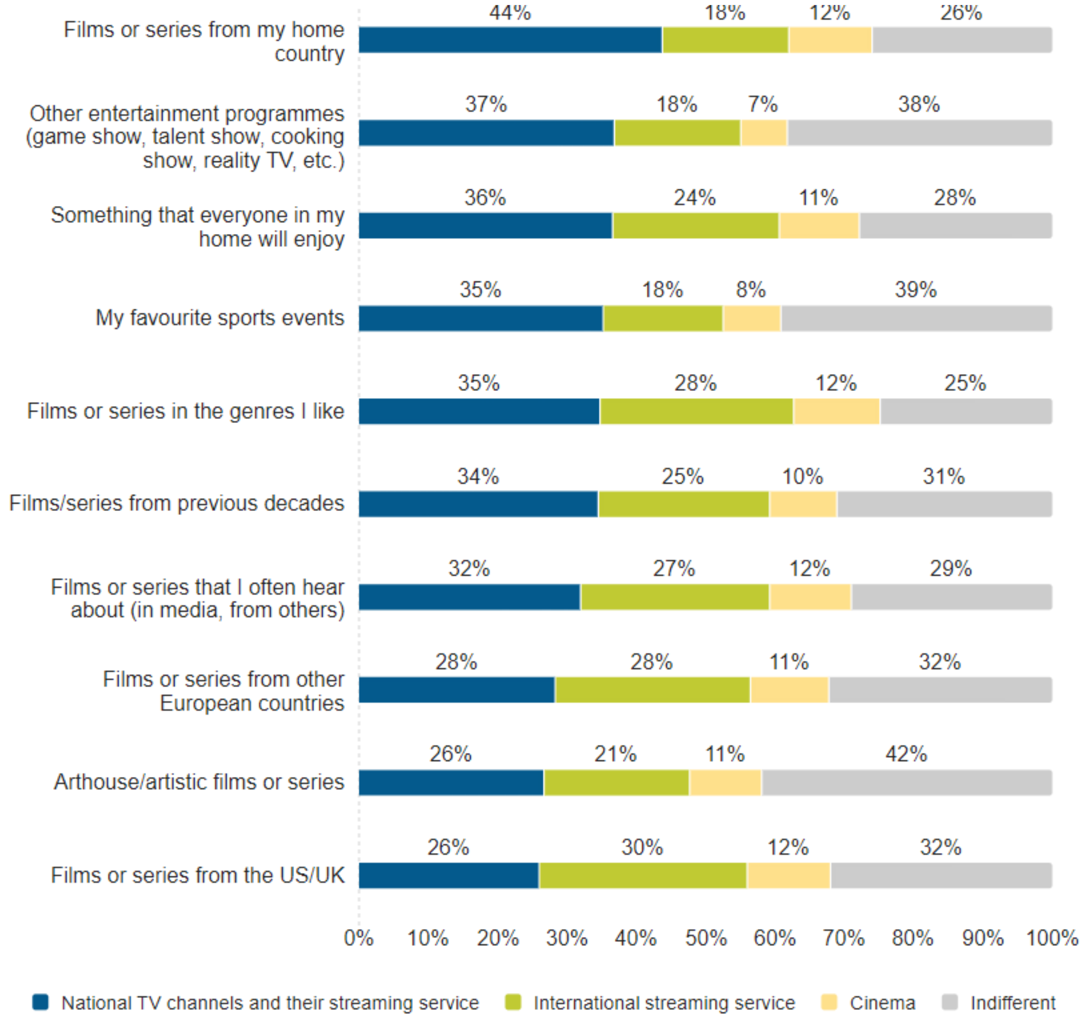
National TV channels are the most preferred option for content from the respondent's home country (44%), other entertainment programmes like game shows or reality TV (37%) and household's favourite programs (36%). This suggests **a strong attachment to local and familiar content on traditional platforms**.

International streaming services, generally show high preference levels, reflecting a significant appeal for globally popular content. In particular, films in genres people enjoy, from the UK and the US or other European countries received a significant share of preferences (respectively 28%, 30% and 28%).

Cinema is particularly popular for content types regularly screened there, such as films in genres people enjoy, films from respondents' home country or the UK/US, and films that they often hear about, each selected by 12% of respondents.

There is also a notable segment of the audience that remains indifferent to the platform, particularly for categories like arthouse/artistic content (42%), sports events (39%) and other entertainment programmes (38%), suggesting **flexibility or a lack of strong platform loyalty among some viewers**.

Question A12. Please indicate whether you are most likely to go to traditional TV channels in your country (including their streaming service) to a global subscription video streaming service or to the cinema if you want to watch the following. (n=22,703)



Audiovisual entertainment content preferences

The table below illustrates the relative importance of various factors in shaping preferences for audiovisual entertainment content derived from a MaxDiff question. Scores above 100 indicate factors that are more influential than average, while scores below 100 reflect comparatively lower importance. The results highlight two primary drivers:

a) **The genre** (e.g., crime, comedy, adventure, sci-fi, horror): Scoring 256, this factor is 156% more significant than the average, making it a primary driver of content selection. Users are particularly drawn to specific genres, indicating that genre preferences play a foundational role in choosing what to watch.

b) **The storyline, dialogue, and characters**: With a score of 156, this factor is 56% more important than the average, ranking as the second most impactful aspect. This suggests that beyond genre, the depth of storytelling and character development significantly influence user engagement.

These two factors stand out as the most decisive in guiding user preferences. Other factors, such as language, franchise connections, and new releases, rank closer to the baseline, showing moderate influence. Elements like artistic value, special effects, and setting are less impactful, underscoring a user preference for content-specific attributes over production qualities.

When comparing these findings to the previous outlook on AV media consumption,[43] the current findings reveal both similarities and slight shifts in the factors influencing user preferences. As in the previous outlook, **genre and storyline, dialogue, and characters** remain the top drivers of content selection, showing the enduring importance of these core elements in attracting audiences. However, results of the current survey reveal that **genre** scored even higher as compared to the earlier outlook, indicating an increased user emphasis on genre-specific content.

Conversely, factors like **new seasons, main actors, and franchise connections**, while still important, appear less influential in this analysis compared to the previous survey. This shift might suggest a gradual consumer shift toward prioritizing the content's unique qualities over-familiarity with actors or franchise links. Additionally, factors such as **visual quality and new releases** remain moderately influential but still secondary compared to genre and storyline, a consistency that further reinforces the content-specific nature of user engagement.

These differences could be attributed to evolving viewing habits, especially as online platforms expand access to diverse genres and high-quality storytelling, potentially making users more selective and genre-focused over time. However, it is also possible that sample or methodological variations contributed to these distinctions.

Question A13. Thinking about what attracts you to a film or series, which of the following things are the most and least important to help you decide what film or series to watch? (n=22,703)

Feature	Relative importance
The genre, e.g., crime, comedy, adventure, sci-fi, horror	256
The storyline, dialogue and characters	156
The film or series is part of a franchise I like (e.g., prequel, sequel, spin-off) or is a new season of a TV show I like	98
The main actors/actresses/filmmakers	97
The main language spoken in the film or series	94
The film or series is a new release	82
I hear/read a lot about the films/series online, on TV, in the news etc.	70

[43] European Commission: Directorate-General for Communications Networks, Content and Technology, (2023).
Consumer survey on consumer behaviour and preferences related to the consumption of audiovisual entertainment content: final report. Publications Office of the European Union.
https://data.europa.eu/doi/10.2759/55576

High artistic value	67
High-quality special effects, music, visual impact	66
It is based on a book or video game I like	61
Where in the world the film or series is set	54

Sources and decision-making for choosing audiovisual entertainment content

The table below shows the relative importance of various information sources that users typically rely on when deciding which films or series to watch, derived from a MaxDiff question. Higher scores indicate sources that are more influential than average in shaping choices, with 100 as the baseline score. The data highlights three primary sources that stand out as the most impactful:

- **Streaming services used (e.g., featured films on homepage, recommendations, trending content)**: Scoring 166, this source is 66% more important than average, making it the top resource for users. This suggests that users heavily rely on in-platform recommendations and trending lists within the streaming services they already use.
- **Friends/family recommendations**: With a score of 160, this source is 60% more important than average, indicating the strong influence of personal recommendations in driving viewing choices.
- **Traditional TV and radio (e.g., talk shows, trailers, interviews)**: Scoring 150, this source is also above average in importance, showing that traditional media remains a relevant source for discovering new content.

Other sources, such as search engines and online databases (score of 138), play a moderately influential role, while social media, critics' reviews, and official social media accounts rank lower, reflecting comparatively less importance. Niche sources like blogs, podcasts, and film festivals score significantly below the baseline, suggesting limited influence on user choices.

1. **Streaming Services**: In the current survey, streaming services are the top information source for content selection, with a relative importance score of 166, showing users' reliance on in-platform features like homepages, recommendations, and trending sections. This shows thatemphasize that users actively engage with content suggestions within streaming services, underscoring the importance of these platforms in guiding viewing choices. (The 2022 survey already revealed the importance of this driver for choosing fims and series on streaming services specifically, while his survey shows the broader impact of this driver)
2. **Friends and Family Recommendations**: Friends/family recommendations rank as the second most important source for discovery. In the 2022 survey, this source ranked also high for finding content within streaming platforms specifically, but the present survey confirms its importance across the board. This consistency highlights the strong influence of personal networks on content discovery, suggesting that recommendations from trusted sources continue to play a critical role alongside digital recommendations.
3. **Traditional TV and Radio**:In the current analysis, traditional TV and radio rank third showing these media remain relevant for content discovery through talk shows, trailers, and interviews.

4. **Search Engines, Databases, and Streaming Guides**: In the current analysis, search engines and streaming databases (e.g., IMDB, Rotten Tomatoes, Justwatch), rank as an above average influential source for discovery.

Question A14. What are the main information sources you would typically rely on to help you choose which films and series to watch? (n=22,703)

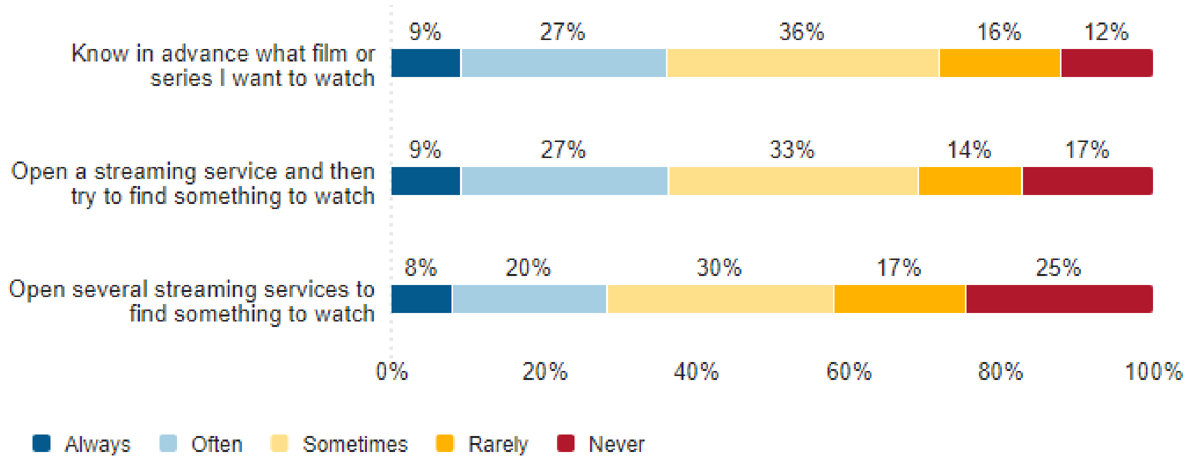
Feature	Relative importance
Streaming services I use (e.g., featured films on homepage, recommendations, trending content etc)	166
Friends/family recommendations	160
Traditional TV and radio: talk shows, trailers, news, interviews with cast	150
Search engines (e.g., Google, Bing), databases (IMDB, Rotten Tomatoes etc), Streaming Guides (Justwatch, Reelgood)	138
Social media – e.g., influencers, chat, comments, trailers	96
Newspapers/magazines (online and print): critics' reviews, interviews	85
Official social media accounts/websites of cast, filmmaker or film/series	80
Film or TV blogs or podcasts	52
Film festivals	45
Other	28

Only a significant minority of respondents (36%) always or often know in advance what they want to watch when streaming, indicating that **most people are undecided. Of the latter, a little over half would typically stick to one.**

The same portion of respondents often or always open one streaming service to find something to watch, suggesting that **a significant number browse their preferred streaming platform for options.**

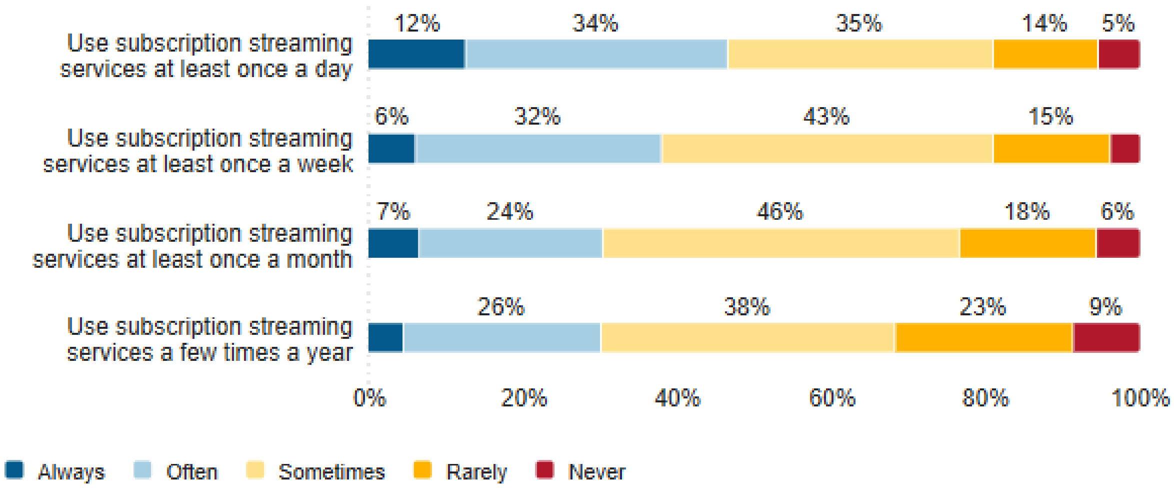
When it comes to browsing across multiple services, a smaller share of respondents, 28%, always or often open several streaming services to find something to watch, and 25% never do so. This indicates that **platform-hopping is not a very common behaviour.**

Question A15. When you stream a film or a series, how often do you: (n=22,703)

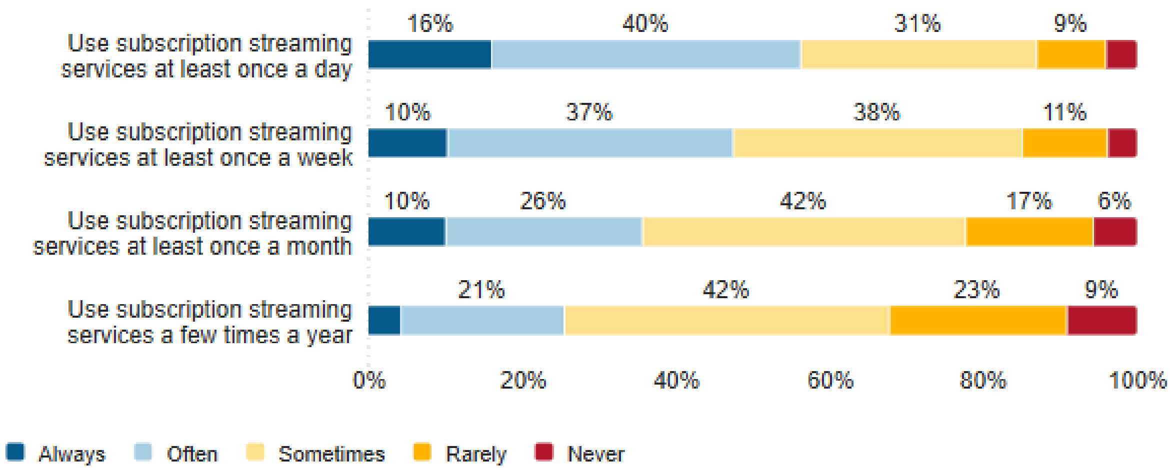


When considering only respondents who use subscription streaming services at least once a year or more, daily users display the highest levels of activity and decisiveness, whether knowing in advance, browsing within a service, or switching between platforms. Conversely, less frequent users are more passive and exploratory, often needing to search or relying less on pre-decided content. The contrast between daily and infrequent users is particularly evident in the tendency to browse multiple streaming services, where infrequent users rarely engage in such behaviour. This highlights a clear distinction between habitual and occasional streaming habits.

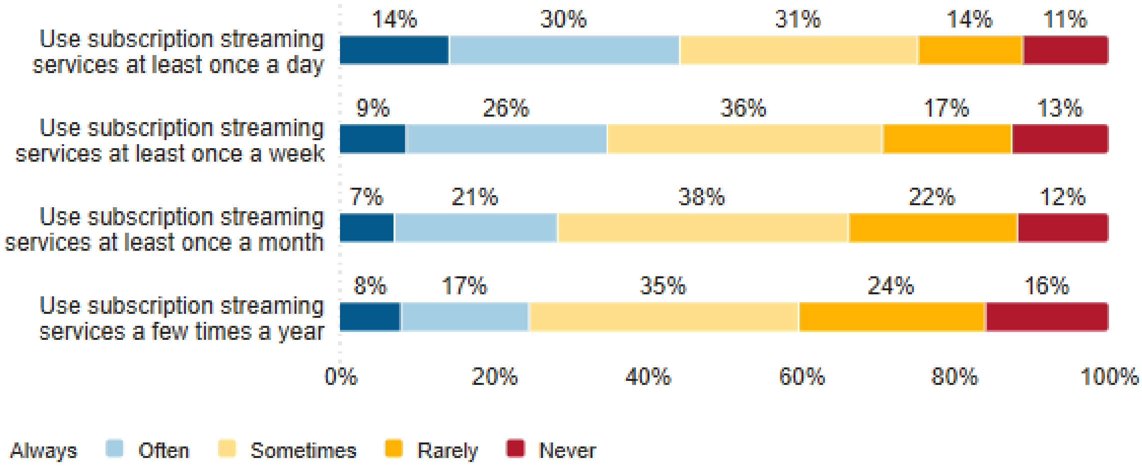
Question A15. How often respondents know in advance what film or series they want to watch, among those who use subscription streaming services.



Question A15. How often respondents open a streaming service and then try to find a film or series to watch, among those who use subscription streaming services.



Question A15. How often people open several streaming services to find a film or series to watch, among respondents who use subscription streaming services.



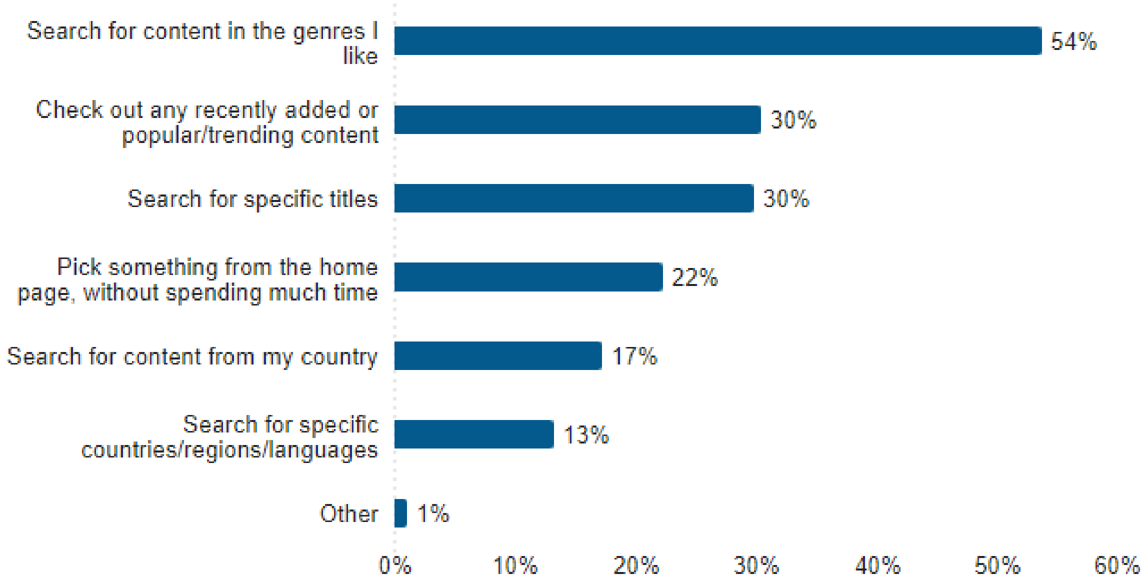
Among those who browse one or more streaming services to find something to watch, respondents primarily search for content in the genres they like (54%), followed by checking out recently added or popular/trending content (30%). Searching for specific titles is done by another 30% and picking something from the homepage without spending much time is a common approach for 22%. A smaller percentage search for content from their own country (17%) or from specific countries, regions, or languages (13%). This highlights the **importance of genre preferences and popular recommendations in guiding viewing decisions**.[44]

Overall, 83% of respondents (n=15,012) could be considered active users, meaning that they actively search for a specific content or title.

If considering only respondents who reported using subscription streaming services in question A2, habits in terms of deciding what to watch do not differ from the overall population.

[44] For question A11b, analysis of open-text responses from those selecting "Other" shows that many respondents decide what to watch based on actors or directors, reviews and recommendations (including those from social media and friends), and mood or interest at the moment. Some mentioned using trailers or checking IMDB ratings as part of their decision-making process, while others rely on their pre-saved watchlist. A few responses indicated searching for specific genres or themes, while some simply browse until they find something appealing.

Question A16. You said you open one or more streaming services to find something to watch. How do you decide typically? Please select all that apply. (n=18,089, 1.66 average clicks)[45]



Viewing preferences

The table below displays the relative importance scores for different types of programs based on how frequently users report watching them at home on TV or streaming platforms, derived from a MaxDiff question. Scores above 100 indicate more frequent viewing than average, while scores below 100 suggest less frequent viewing. The analysis identifies two primary content types that users watch the most:

- **Films**: With a score of 230, films are the most frequently watched type of content, indicating that users are particularly drawn to feature-length programming.
- **Series (longer episodes with limited seasons)**: Scoring 216, series are also highly popular, ranking just below films and emphasizing the appeal of episodic content with extended storytelling.

Other content types, such as **news and current affairs** (96) and **sports** (93), score closer to the average, reflecting moderate levels of viewing frequency. Lower-ranked categories, including **soap operas** (41), **sitcoms** (37), and **stand-up comedy** (27), fall well below the baseline, suggesting these genres are watched less frequently compared to films and series.

These results are congruent with the findings of similar questions in the previous consumer survey, where news, film and series were also flagged as the types of programs most watched. At the same time, also sports programmes were largely selected. Stand-up comedy, sitcoms and soap operas were designated as the programmes watched the least also in that occasion.

The correlation between audience preferences for AV content (i.e., soap operas, sitcoms, series, other shows like game shows and reality TV, documentaries, films, news and current affairs programmes, stand-up comedy and sport) and various demographic factors such as gender, age, education, and financial status reveals some interesting trends.

[45] Question asked only if answer "Never" or "Rarely" was not selected in question A15.

a) **There is generally a balanced preference for some AV content, such as sitcoms, films, news and current affairs programmes, and stand-up comedy. However, notable differences emerge in other genres**. Women are more likely to watch soap operas (23% select it as one of the AV contents they watch the most, compared to 15% of men), series (82% vs 67%), and other shows like game shows and reality TV (42% vs 25%). In contrast, men are more likely to watch documentaries (64% vs 50%) and sports (59% vs 18%).
b) There are clear generational differences in preferences when it comes to AV content. **Documentaries and news and current affairs programmes are more popular among older viewers**. In the first case, the percentage of respondents selecting documentaries as one of the contents they watch the most increases from 39% among individuals aged 18-30 years old to 63% among those aged over 60. In the second case, we observe an increase from 40% to 77%. In contrast, **sitcoms, stand-up comedies, and other shows like game shows and reality TV are more popular among young viewers.** In the first case (sitcoms), the percentage decreases from 49% (18-31 years old) to 15% (60+ years old). Similarly, for stand-up comedies, it decreased from 34% to 14%, and for other shows from 46% to 21%. Interestingly, **series and films are equally enjoyed across all age groups,** making them a universal form of entertainment.
c) **There is no significant correlation between AV content preference and educational level across most types of content**. About 33% to 36% of users across various AV content types have tertiary education. The only notable exception is for stand-up comedies, where 46% of viewers hold tertiary degrees, suggesting a slightly higher appeal of this genre among more educated audiences.
d) **No significant correlation was found between AV content preferences and family situation**. Whether individuals live alone or with others, or have children, did not noticeably influence their consumption habits for different types of AV content.
e) **There was no significant correlation between AV content preference and whether individuals live in urban, town, or rural areas**. This suggests that content consumption trends are fairly consistent across different living environments, with no strong urban or rural divide in terms of AV preferences.

In summary, while gender, age, and financial situation show some influence on AV content preferences, factors such as education level, family situation, and living environment appear to have little or no impact on what content people consume. Soap operas appeal more to lower-income groups, older viewers gravitate towards documentaries, films, and news, while sitcoms and stand-up comedies attract younger audiences. Gender differences are most pronounced in the consumption of series and soap operas, with women being the dominant audience.

Question A17. What type of programmes do you watch the least and the most at home on TV or streaming? (n=22,703)

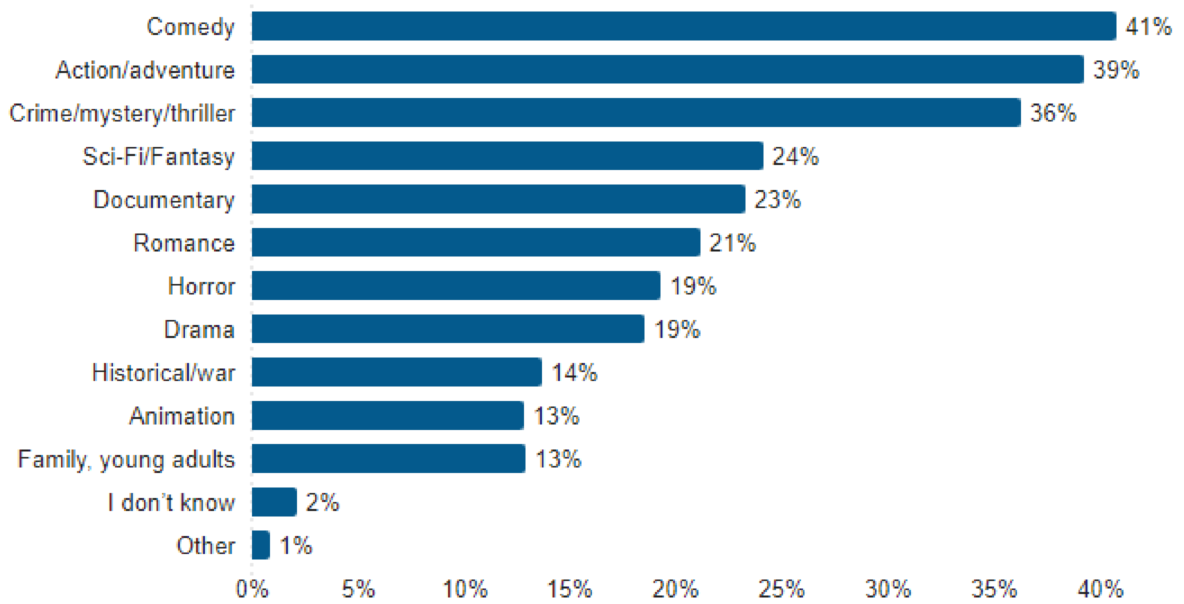
Feature	Relative importance
Films	230
Series (with longer episodes and a limited number of episodes each season)	216
News and current affairs programmes	96
Sport	93

Other shows, like game shows, reality TV (like cooking, dating, celebrities) or variety shows (like talk shows, singing/dancing)	86
Documentaries	75
Soap operas	41
Sitcoms	37
Stand-up comedy	27

The most popular film and series genres in respondents' households include comedy, action/adventure, and crime/mystery/thriller, selected by, respectively, 41%, 39% and 36% of respondents. Sci-fi/fantasy, documentary, romance, horror and drama also rank highly. **Less popular genres include historical/war, animation and family/young adults, each with less than 15% of preferences.**[46] Similarly, in the 2022 version of the consumer survey, the most liked genres were crime/mystery/thriller (39%), action/adventure (37%) and comedy (36%), both for series and films.

When splitting results for household composition, it is interesting to notice that animation and family/young adult content are the most popular among households with children, with almost half of the preferences expressed by persons living with children (respectively 49% and 45%).

Question A18. What types of films and series are the most popular in your household? Please select at most 3 options. (n=22,703, 2.81 average clicks)



Country of origin preferences

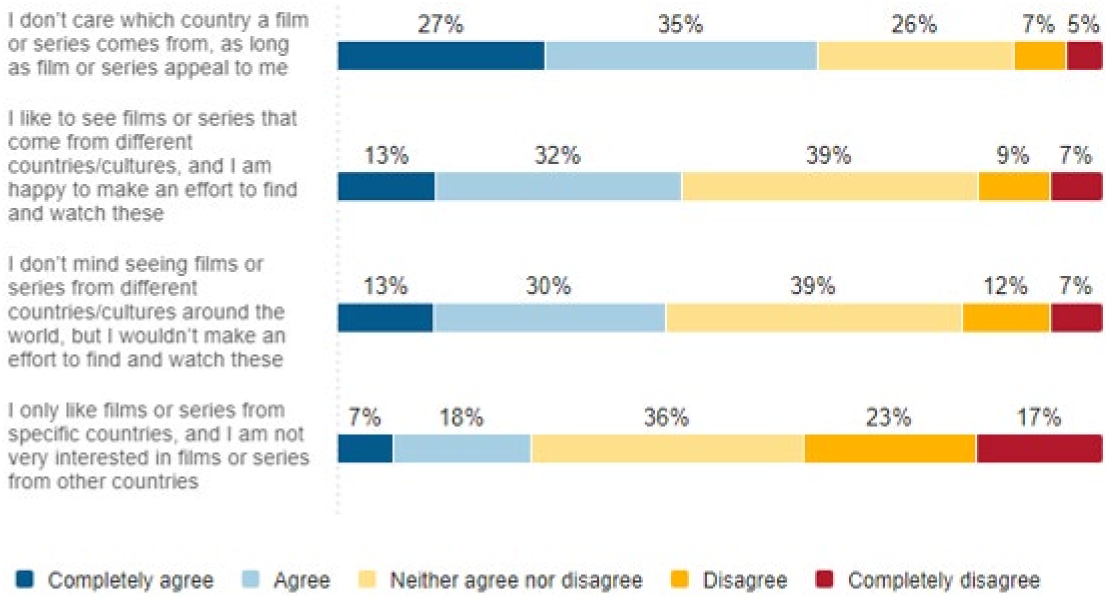
In line with previous results of the 2022 consumer survey, the country of origin of film or series does not seem to matter for a majority of respondents (62%), This suggests a **general openness to international content.**

[46] For question A13, analysis of open-text responses from those selecting "Other" shows that popular types of films and series in households include anime, western films, and reality shows. Other frequent mentions are sports, documentaries, and historical films. Some respondents prefer musicals, crime/police dramas, and telenovelas, while a few specified fantasy and superhero films. Additionally, there are mentions of psychological thrillers, comedy (including romantic comedies), and true crime. A small number of responses also indicate a preference for adult content.

Another significant chunk of respondents (45%) generally agree that they like to see films or series coming from other countries or cultures, and are even happy to make an effort to find these, which reflects significant **curiosity and appreciation for international content**.

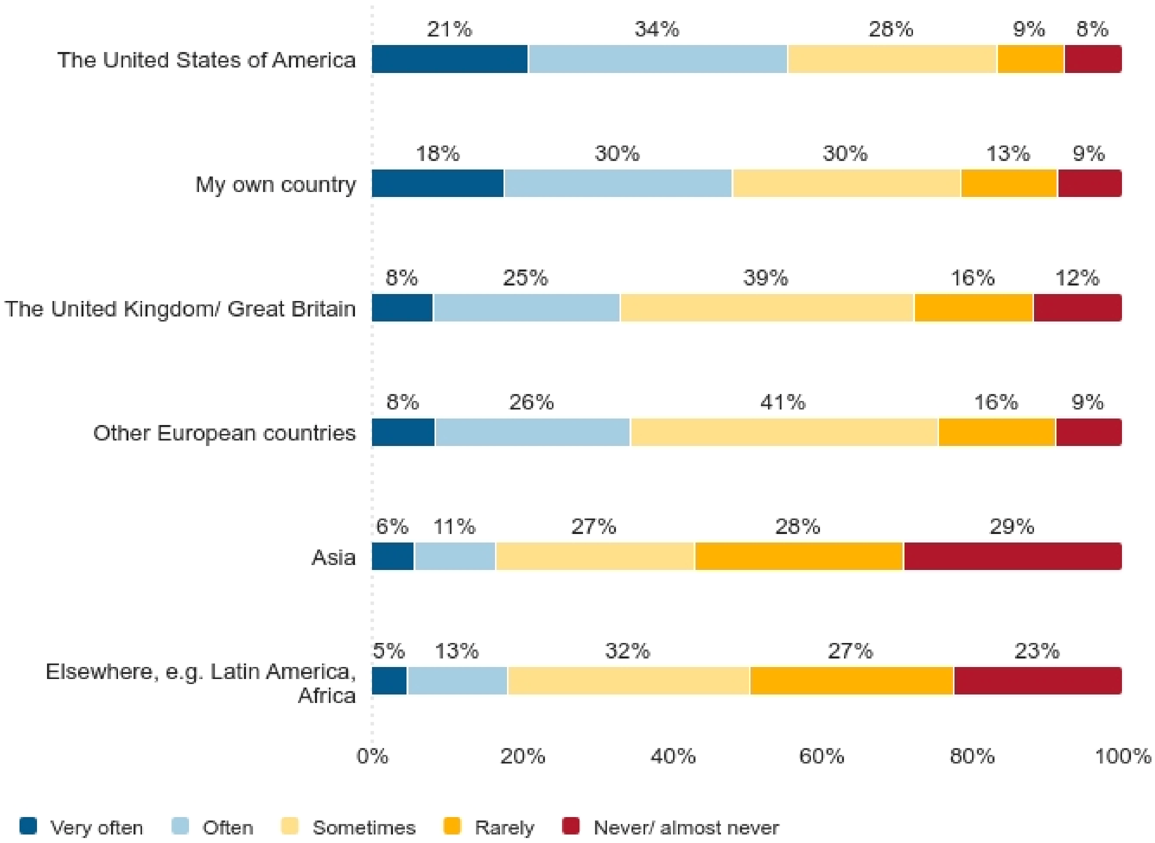
A similar portion of respondents (43%) expressed openness to international content, but they would not make an effort to find such content, suggesting a more passive appreciation/engagement. Finally, fewer respondents (25%) have a preferred country of origin for films or series, suggesting that **most viewers are not particularly restrictive about the origin of the content they watch**.

Question A19. How much do you agree or disagree with the following statements about the country in which films or series are made? (n=22,703)



Content from the USA is highly popular, with 55% of respondents saying they watch it often or very often, reflecting the strong presence of US media in global entertainment. Almost half of **respondents say they frequently watch films and series from their own country**, with a significant portion doing so often or very often (48%). 33% of respondents report watching **British content often or very often**. Even slightly more, **34% of respondents say they watch content from other European countries often or very often**. Similarly, a smaller but significant percentage of respondents (18%) say they view often or very often **content from Asia (17%) and other regions like Latin America and Africa (18%)**.

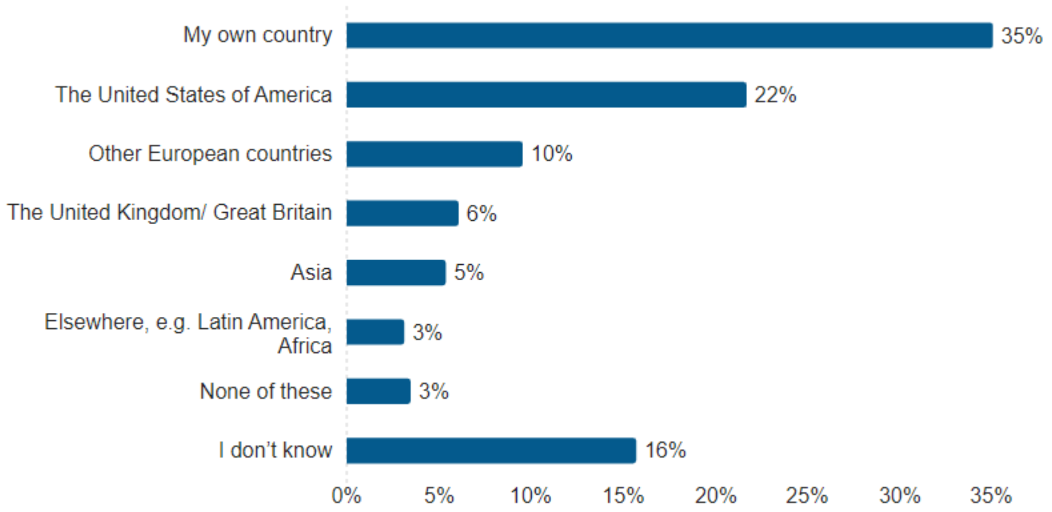
Question A20. Thinking about what films and series you watched in the last year in cinema, TV, streaming etc, how often did you watch films/series from the following areas? (n=22,703)



When asked about which countries or regions they would like to see more content from, it is significant that a large portion of respondents (35%) express **interest in seeing more films or series from their own country**, more than 10 percentage points more than from the US (22%). **There is also interest in more content from other European countries (not including the UK), as expressed by 10% of respondents**. This declared preference for additional European content is less than half that for additional US content (22%), but higher than the declared preference for additional content from the UK (6%), Asia (5%) or other parts of the world (3% altogether).

The responses echo broadly the findings of the corresponding question in the 2022 consumer survey, where US and local content were also the top two (45 and 44% of respondents said they wished to see more content from the US and their own country respectively), followed by UK and other European content, which was equally popular (28% of respondents wished to see more content from both the UK and other European countries). It is worth noting that in the previous survey respondents were limited to three choices, while in this survey they could only pick one. This can explain the specific differences in the results, in particular the higher expressed preference for local over US content and for (non-UK) European over UK content.

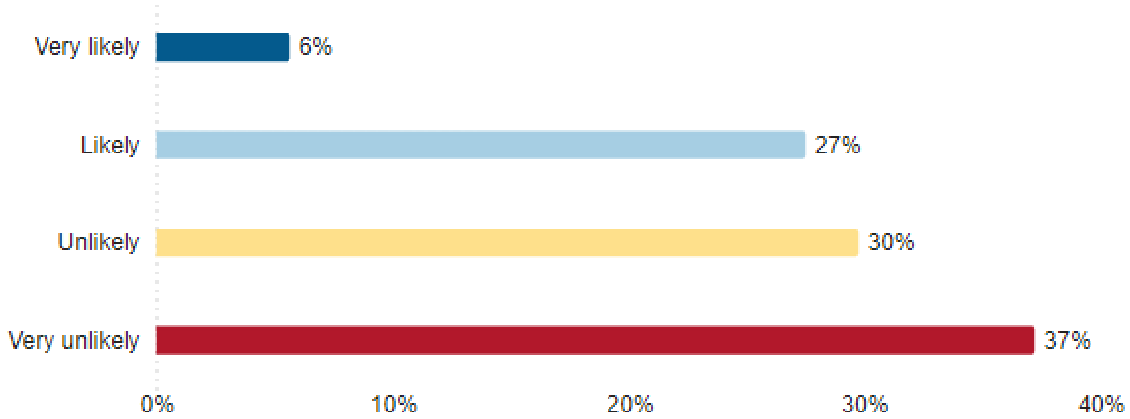
Question A21. From which of the following countries or regions, if any, would you like to see more films or series? (n=22,703)



When it comes to paying for access to unavailable content from another European country, respondents are polarised. A combined 67% indicate they are unlikely or very unlikely to pay for such access, while 33% are likely or very likely to do so. This suggests that **while most respondents are satisfied with local or readily available options, there is also some willingness to pay for cross-border offers**.

As age increases, there is a clear shift towards a greater proportion of respondents expressing unwillingness to pay for access. Younger age groups, particularly those aged 18-30 and 31-40, are more open to paying to access content not available in their country (43-40%). In contrast, this likelihood decreases significantly with age. Respondents over 60 are the least inclined, with over half (52%) indicating they are very unlikely to pay, compared to 22-29% in younger groups.

Question A22. There is a TV programme, sport or film that is not available in your country. Would you pay to watch it using TV channels offered in another European country? (n=22,703)



2.2.2. Further assessment of results

Drivers of traditional TV subscription changes

Viewing habits play a significant role in the likelihood of cancelling traditional TV subscriptions to rely on streaming services. **The majority of people who watch sports daily or weekly (51%-60%) have not cancelled neither considered to do so,** while only around 28%-24% have seriously considered to cancel their traditional TV subscription and 21%-14% have already done so. **Daily or weekly news consumers follow a similar pattern.** Indeed, it appears that the majority has not to consider cancelling their TV subscriptions (66%-52%), against around 21%-30% which have considered doing so and 13%-19% which already cancelled.

There does not seem to be a correlation between the frequency of AV content consumption in general and the decision to cancel, nor does paying for multiple streaming services show any strong link to the likelihood of cancelling traditional TV in favour of streaming services.

Those who choose to pay for ad-free experiences are also less likely to cancel their traditional TV ubscription in favour of streaming services (75%, against 55% who use free service with ads and 47% who prefer cheaper services with ads).

When it comes to content preferences, no significant correlations have been identified between viewing habits (such as a preference for EU or non-EU content) and the likelihood of cancelling traditional TV subscriptions.

Spending on AV content and services

While the findings provide valuable insights into media spending patterns across different groups, they should be interpreted with caution. As outlined in the research limitations (please see Annex V. Research limitations), potential overlaps in reporting between spending on bundled services and standalone TV services may have led to overestimations in certain categories. These methodological challenges highlight the importance of considering these results as indicative rather than definitive.

The key drivers behind consumer spending on AV content and services are influenced by several factors, which vary depending on demographic groups and individual preferences. Geographical location, education level, privacy concerns, age, and family status all play a role in shaping how much people are willing to spend on AV services.

With the average spend on AV media activities at EUR 40.73 EUR (see Q5 in Chapter 2), **people living in rural areas tend to spend EUR 8 less on AV content and services compared to those in urban regions.**

Age is another important factor. **Younger individuals, particularly those aged between 18 and 30, spend EUR 8 less on AV content compared to older age groups (over 30)**. In contrast, **people with children tend to spend EUR 14 more than those without**, possibly reflecting the broader range of content they need to cater to different age groups within the household.

Financial situation also has a significant influence on spending. **People reporting a comfortable financial situation spend EUR 10 more on average than those with a financial situation allowing them to meet their basic needs.** In contrast, people with an uncomfortable financial situation spend EUR 11 less on average than those who are able to meet their basic needs.

There is a moderate link between the types of content consumed (such as films or sports) and how much individuals spend on AV services. Amount spent looks to be more connected to overall lifestyle factors than to preferences for specific content categories. The most significant difference is seen among daily or weekly sports viewers, who spend an additional EUR 12 on average, which can be attributed to the premium nature of sports broadcasting often available only through subscription-based services or pay-per-view platforms.

The use of free streaming services with advertisements is another factor that reduces spending. **People who use these ad-supported platforms spend less on average than those who don't.**

While general media consumption does not appear to be significantly correlated with AV spending, the willingness to pay is notably influenced by whether or not consumers are prepared to tolerate advertisements. **Those who are content to see ads tend to spend less on AV services overall**.

Competitiveness of EU content and scripted content

Among those who, in the last year, watched films or series from other European countries often or very often, almost half (43%-49%) are likely or very likely to pay to watch titles not available in their own country and offered by a channel in another European country. Similarly, among those watching content from their own country often or very often, 43% are willing to pay to watch titles are only available in another European country. Regular viewers of films or series from the UK show a high willingness to pay to get access to titles currently unavailable in their own country, with 56% stating they are very likely to pay compared to 31% of those who do not watch UK films or series often or very often. Similarly, 40% of frequent viewers of US films or series are willing to pay to watch content available in other countries. **Viewers who watch films or series from Asia and Latin America or Africa often or very often demonstrate the highest willingness to pay, with respectively 63% and 62% expressing this sentiment**.

The use of streaming services is correlated with the consumption of foreign content, especially from the UK and the US: 75% of people watching content from their own country or other European countries often or very often frequently (i.e., daily or weekly) use streaming service, against 83% of those who watched content from the UK often or very often and 81% of those who watched content from the US often or very often.[47] On the other hand, frequent **viewers of traditional TV channels tend to watch slightly more often content from their own country**: 80% of those who reported watching often or very often content from their country watch traditional TV channels daily or weekly, against 76% of those who watched content from the UK or US.

When examining media consumption habits, the correlation between the type of AV programme consumed (scripted vs. non-scripted) and overall media preferences reveals insightful patterns. For instance, among those who daily or weekly consume scripted content, such as series, a high proportion also engage with news (73%), films (73%), and social media (84%) daily or weekly, showcasing a diversified consumption behaviour. By contrast, non-scripted content like reality shows garners relatively lower overlap, with 30% of series viewers and 29% of film viewers (daily or weekly) also engaging with reality shows.

Daily or weekly documentary viewers exhibit a strong tendency to consume news (77%) and social media (73%) daily or weekly, reflecting an interest in information-driven content. Similarly, those who watch films or series one or more times a week show a significant overlap with consuming news (74%) and social media (79%) daily or weekly,

[47] The correlation between streaming service use and content consumption varies by region. The relationship is weak for domestic content ($r = 0.0908$, $p < 0.001$), suggesting limited association. By contrast, stronger correlations are observed for content from the UK ($r = 0.270$, $p < 0.001$) and the US ($r = 0.319$, $p < 0.001$). The regression results confirm a more robust association for foreign content compared to domestic content in predicting higher streaming service usage for those watching content from the UK and the US.

but they are less inclined towards consuming reality shows (29%) with this frequency. Meanwhile, frequent sports consumption (i.e., daily or weekly) has strong overlaps with frequent social media (84%) and music (85%).

Competitiveness of traditional TV and national broadcasters

When it comes to paying for TV services, people frequently watching traditional TV channels (i.e., daily or weekly) are still inclined to subscribe, but the percentage is slightly lower compared to those who engage with streaming services or other forms of entertainment. **Around 66% of frequent traditional TV viewers pay for services, while 72% of those watching streaming services daily or weekly, or who go to the cinema with this frequency have subscriptions**. Interestingly, of those who declared not to pay for services, 46% use subscription streaming services at least once a month or more frequently, suggesting that they might either be misreporting their habits or using those services in illegal ways.

In terms of content preferences, daily or weekly **viewers of traditional TV channels tend to gravitate towards soap operas and news.** Approximately 48% of frequent traditional TV users watch soap operas daily or weekly, compared to 31% of frequent streaming service and cinema users. Additionally, 80% of daily or weekly traditional TV viewers consume news with this frequency, as opposed to 64% of those who frequently use streaming services. On the other hand, **genres such as series, documentaries, and stand-up comedy are more popular among those who frequently use streaming services or who go to the cinema daily ore weekly**.

There is no significant difference when it comes to the preference for EU or non-EU content between traditional TV users and those using other media (i.e., subscription streaming services, online services offered by traitional TV channels, cinema), nor is there a notable correlation between general media consumption habits and the preference for traditional TV channels. However, **reality shows, and news are more commonly consumed at least once a week by frequent traditional TV viewers**. Around 36% of frequent traditional TV users watch reality shows daily or weekly, compared to 29% of those who do not watch traditional TV at all, and 80% of frequent traditional TV viewers consume news content daily or weekly compared to 64% of non-users.

A connection exists between traditional TV consumption and trust in news sources. Approximately **7.4% of daily or weekly traditional TV users selected public TV as the source of news they trust the most, which is nearly double the 3.7% reported by non-traditional TV users.**[48]

The use of smart TVs, compared to oter devices, does not seem to reduce the likelihood of watching traditional TV channels. For instance, across all devices, people who never or almost never watch traditional TV channels are between 22% for radio, 23% for TV, 25% for smart TV and 27% for smartphone, tablet and laptop/pc.

[48] Correlation analysis showed a positive association between traditional TV consumption and trust in public TV as a news source (Spearman's rho = 0.242), with a difference between frequent traditional TV users and non-users. Additional statistical tests, including a chi-squared test (Cramér's V = 0.268) and a t-test (Cohen's d = 0.625), confirm that frequent traditional TV viewers are more likely to trust public TV, while the absolute level of trust remains low.

Impact of new content access methods and social media

Social media platforms play a growing role in the discovery and consumption of AV content, acting as a significant influence on how users find new shows, films, or documentaries to watch. In addition, streaming platforms themselves are becoming the primary source of information for 78% of users relying on them for series, 76% for films, 70% for documentaries, 69% for news, and 66% for soap operas. This highlights how integrated these platforms have become, not only as content providers but also as recommendation engines that guide user behaviour. **Search engines also play a significant role in content discovery and consumption.** They are used by 66% of those interested in films, 60% for news and documentaries, 54% for sports, 52% for series and sitcoms, 51% for stand-up comedy, and 42% for soap operas. Together, streaming platforms and search engines represent the primary channels through which users engage with audiovisual content.

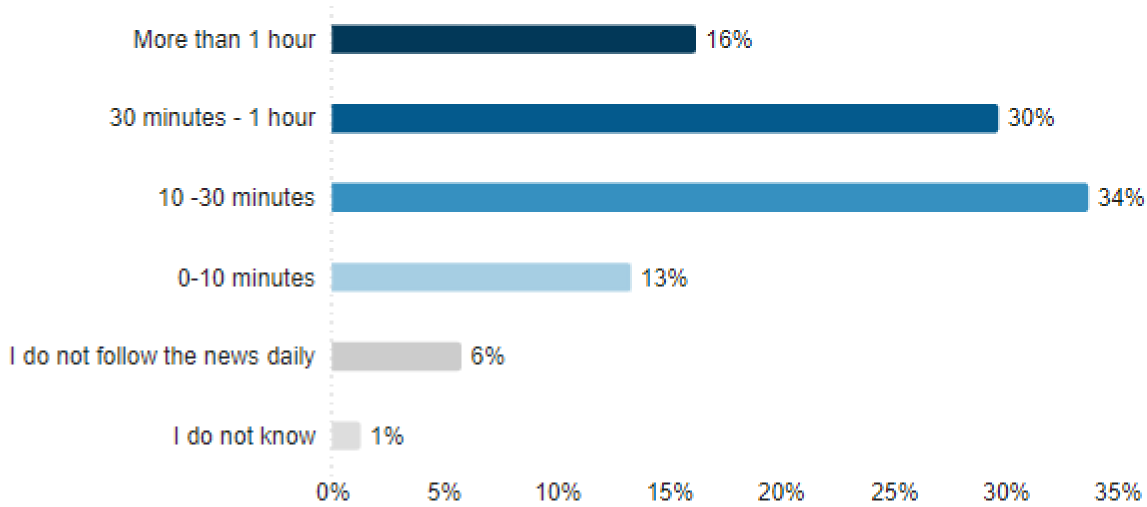
2.3. News consumption trends

2.3.1. Overall consumption trends

Around 2/3 of respondents (64%) typically spend between 11 minutes and 1 hour per day following the news**.** Meanwhile, 16% of respondents invest over an hour each day. On the other end of the spectrum, 13% spend a minimal 0 to 10 minutes per day on news. Notably, 6% of respondents do not follow the news daily, which might highlight a segment of the population disengaged from regular news consumption.

When examining age groups, younger respondents, particularly those aged 18-30 and 31-40, are more likely to spend shorter periods following the news, with significant proportions (57% and 56%, respectively) spending only from 0 to 30 minutes per day, against 35% of those older than 60. Indeed, older respondents tend to follow the news for longer periods. In the over-60 age group, 26% report following the news for more than one hour daily, compared to only 8% (18-30) and 10% (31-40) in younger age groups. Additionally, the proportion of young respondents who do not follow the news daily is higher (11% for those aged 18-30) than that of older groups (3% for those aged over 60).

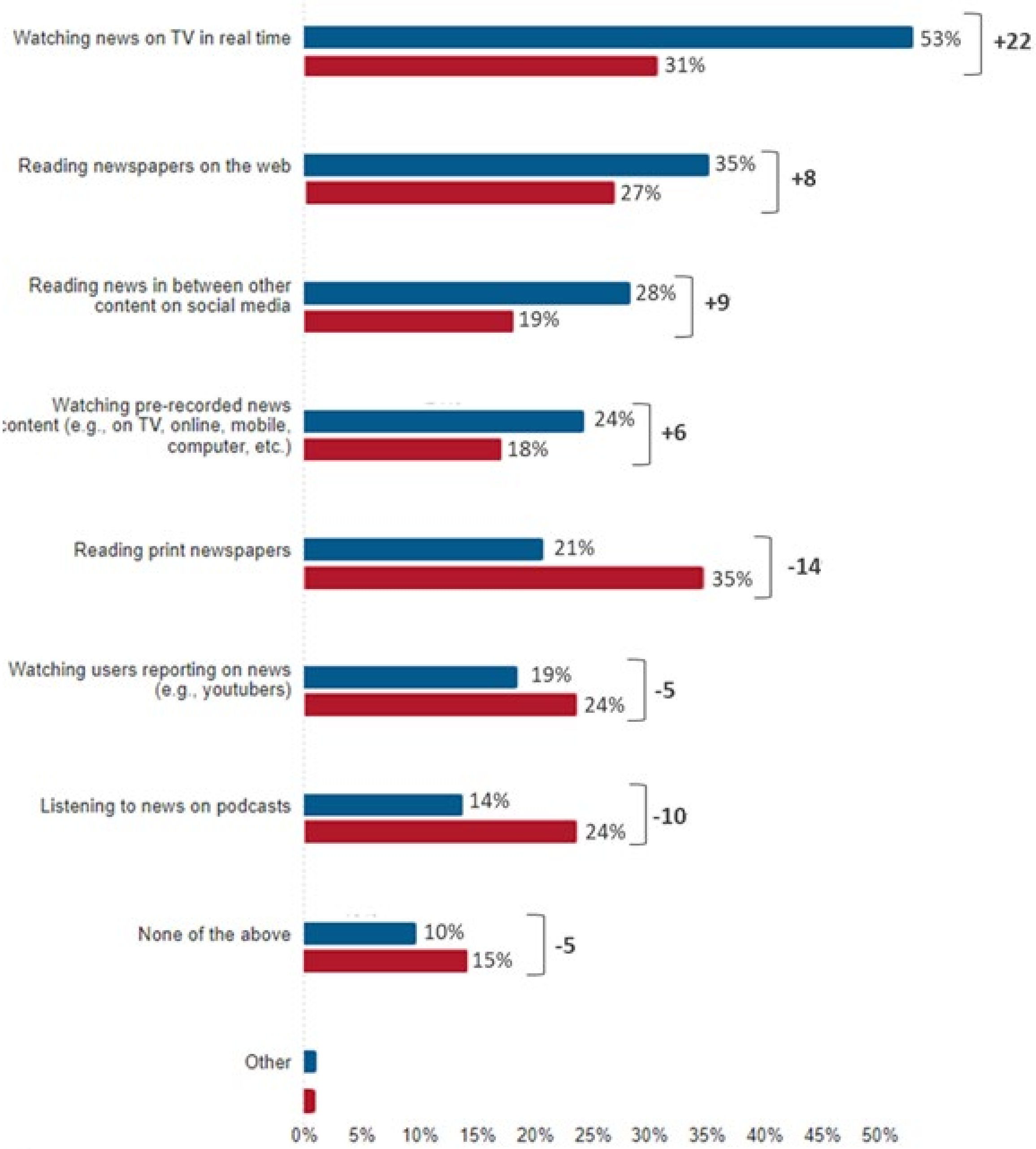
Question N1. How much time per day do you spend following the news? (n=21,501)



Shifts in formats

Over the past year, there has been a noticeable shift in the formats of news consumption. The most significant increase was in the consumption of real-time TV news, with **53%** of respondents reporting more frequent usage and **31%** reporting less usage, resulting in a **net increase of 22 percentage points**. Reading newspapers on the web, consuming news on social media, and watching pre-recorded news content also saw increases, with **net gains of 8, 9, and 6 percentage points** respectively. Conversely, print newspapers experienced the most significant decline, with a **net decrease of** -**14 percentage points**. Watching users reporting on the news (e.g., YouTubers) and listening to podcasts also saw declines, with **net decreases of -**5 **and -**10 **percentage points**, respectively.

Questions N2 and N3. Are there some news formats/sources you have been using more frequently and, as a consequence, less frequently in the last 12 months? (n=21,501, 2.08 average clicks)



The table below presents the **substitution effects in news consumption, detailing the increased use of one news format and the decreased consumption of other formats.** The left column lists each news format where consumption has increased, while the right columns show the percentage decrease in other formats due to this increased use. Each cell represents the percentage of respondents who reported a reduction in consumption of a particular format as a result of spending more time on the format indicated in the row.

- **Reading print newspapers:** 21% of respondents reported an increase in reading print newspapers. Among these users, 43% reduced time spent reading news between other content on social media and watching users reporting on news, suggesting that those who turn to print are consciously shifting away from quicker, less formal news sources, possibly seeking more credibility or depth in their information.

- **Reading newspapers on the web:** 35% of respondents indicated an increase in reading newspapers on the web. Among these users, 34% reduced watching users reporting on news, and 33% reduced listening to news on podcasts and watching pre-recorded news. This suggests that, for these users, digital newspapers may satisfy the need for formal, reliable information more than informal or audio-based formats.
- **Watching news on TV in real-time:** 53% of respondents reported increased consumption of news on TV in real-time. Among these users, 40% decreased their time listening to the news on podcasts and 38% watching users reporting on the news. These audiences might value immediacy in news, leading them to deprioritise slower or less interactive formats like podcasts and user-generated content.
- **Watching pre-recorded news:** 24% of respondents indicated an increase in watching pre-recorded news, reflecting an ongoing demand for flexibility in news timing. Of these users, 26% reduced time watching users reporting on news, 24% listening to news on podcasts, and 23% read news between other content on social media.
- **Reading news between other content on social media:** 28% of respondents reported an increase in reading news between other content on social media. Among these, 26% reduced reading print newspapers and 25% reduced both watching users reporting on news and listening to news on podcasts. This might indicate a preference for integrated, easily accessible news updates, which appears to draw users away from traditional and structured formats like print and user-reported news.
- **Watching users reporting on the news:** 19% of respondents reported increased engagement with users reporting on the news. Among these users, 32% reduced listening to news on podcasts and 29% reduced reading print newspapers and watching pre-recorded news, suggesting that these audiences appreciate more personal or peer-driven perspectives on current events.
- **Listening to news on podcasts:** 14% of respondents reported increased engagement with listening to news on podcasts. Among these users, 31% reduced time spent watching users reporting on news and 30% watching pre-recorded news and reading news between other content on social media.

Substitution Effects in News Consumption: increased use of one news format and decreased use of other formats. (n=21,501)

% increase consumption of:		% decrease consumption of: Reading print newspapers	Reading newspapers on the web	Watching TV in real time	Watching pre-recorded news	Reading news on social media	Watching users reporting on news	Listening to news on podcasts	Other
Reading print newspapers	21	0	39	37	41	43	43	42	30
Reading newspapers on the web	35	30	0	27	33	30	34	33	25
Watching TV real-time	53	32	31	0	36	32	38	40	22
Watching pre-recorded news	24	22	20	19	0	23	26	24	16
Reading news on social media	28	26	22	20	24	0	25	25	21
Watching users reporting on news	19	29	27	26	29	27	0	32	20
Listening to news on podcasts	14	29	25	26	30	30	31	0	16

Preferred sources of news

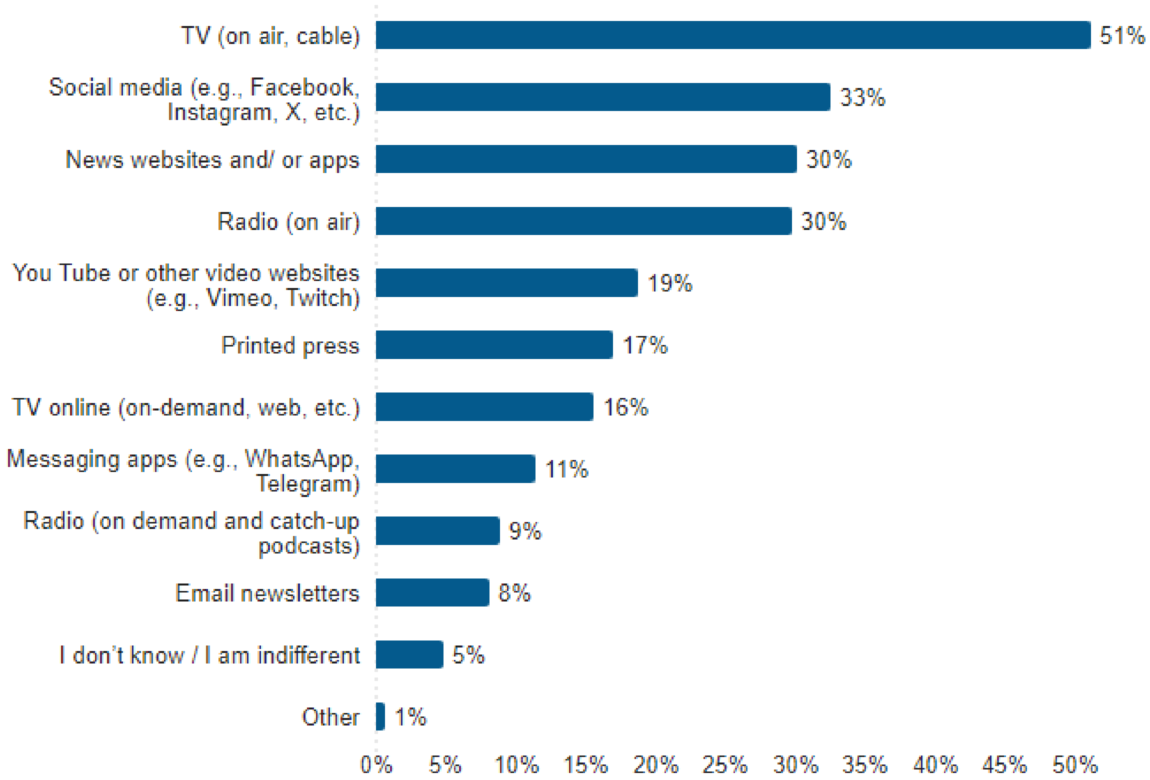
Traditional television remains the most popular source of news, with 51% of respondents favouring it. Social media follows closely, preferred by 33% of respondents. Digital news websites and apps also play a crucial role, with 30% of respondents selecting them as their primary news source. Radio, both live and on-demand, is an important source for another 30%. Video platforms like YouTube are favoured by 19% of respondents, showing the growing appeal of video-based news content. Print media is considered a go-to source for news only by 17% of respondents. The remaining respondents are spread across various other formats, with a small portion expressing indifference or uncertainty about their preferred news source.[49]

There are differences in preferences among age groups. When looking at age groups, older respondents, particularly those over 60, have a strong preference for traditional TV, with 29% indicating this as a primary source, compared to only 14% among the youngest group (18-30). Older groups also show higher engagement with radio and printed press. Younger respondents, on the other hand, prefer more digital and interactive sources like social media (23% for those aged 18-30), YouTube or other video websites (14%) and news websites or apps (13%), reflecting a shift towards digital news consumption.

Variations based on education levels are less pronounced. All groups favour TV and news websites as their main sources, regardless of education level. However, higher-educated respondents slightly prefer news websites and apps (15%) compared to those with lower education (11%).

[49] For question N4, respondents who selected "Other" often listed digital and online sources as their preferred way to access news, such as specific apps from news channels (e.g., CNN), Google News, online newspapers, or news podcasts. A number of respondents also indicated that they prefer news from friends, family, or alternative media platforms like Rumble and blogs. Some mentioned not following news at all or using unconventional sources like 9gag or specific search engines for curated information.

Question N4. What are your preferred sources of news? Please select max 3 options. (n=21,501, 2.33 average clicks)



Among respondents, 46% watch only "TV on air or cable," 10% watch only "TV online (on-demand, web, etc.)" and 6% watch both formats, resulting in a combined net reach of 62% for TV. This calculation accounts for overlap, ensuring that respondents engaging with both traditional and online TV are not double-counted.

Similarly, 28% of respondents listen only to "Radio on air," 7% listen only to "Radio on demand and catch-up podcasts" and 2% use both formats, resulting in a combined net reach of 37% for radio. As with TV, this calculation accounts for overlap to avoid double-counting. Traditional "Radio on air" continues to dominate as the primary listening choice, while on-demand radio serves as a growing alternative. The overlap indicates that some respondents use both formats, showcasing a blend of traditional and modern listening behaviours.

Among respondents, 13% consume news exclusively through printed press, 27% rely solely on news websites or apps, and 4% use both formats. This results in a combined net reach of 44% for news consumption via these channels, accounting for the overlap to avoid double-counting. The findings indicate that digital news platforms, such as websites and apps, are the dominant choice for news consumption, far surpassing the printed press.

Lastly, the combined net reach (based on preferences) for those engaging with social media, messaging apps, YouTube or other video websites is 40%, accounting for overlaps between the categories. This total includes 20% of respondents who rely exclusively on social media, 4% who use only messaging apps, and 8% who rely solely on YouTube or other video websites. Additionally, 1% engage with both social media and messaging apps, 5% use both social media and YouTube, and 2% engage with all three platforms simultaneously. These findings highlight that social media remains the dominant choice for digital media consumption, with overlapping usage reflecting the integrated nature of modern media habits.

Most followed topics

National news is the most followed topic, with 53% of respondents dedicating significant time to it. **Local and international news are also popular**, engaging respectively 46% and 45% of respondents. Topics related to society, such as education, health, and the environment, are followed by 34% of respondents, indicating a solid interest in social issues. **Topics like investigative reporting, specialised topics (e.g., farming, medicine, law) and news content created by social media users are less prominent**, with each engaging around 20%, 16% and 12% of the audience. Altogether, national, local and international events remain at the forefront of public interest.[50]

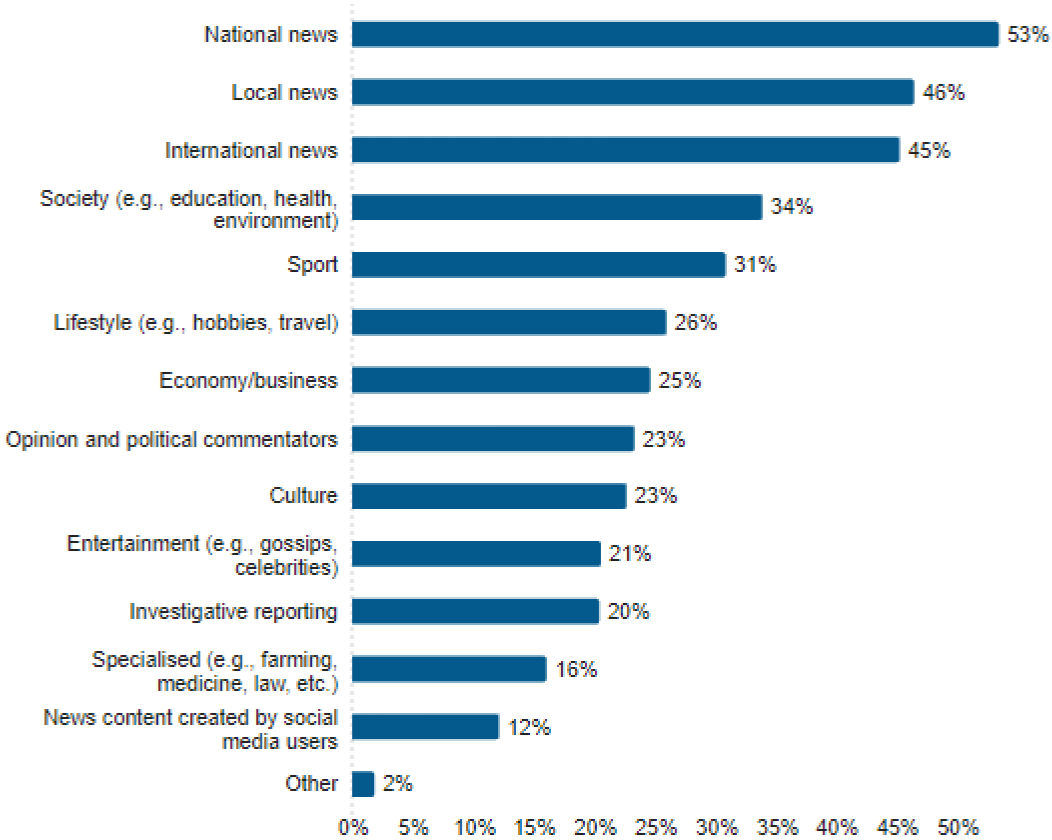
Men are more likely to consume sport news compared to women, as they are more than twice as likely to select sport news compared to women (12% vs. 5% of their total choices, respectively). In contrast, more women favour society compared to men (10% vs. 7%), lifestyle (9% vs. 5%), culture (7% vs. 5%), and entertainment (7% vs. 3%).

Education does not play a significant role in news topic preferences, but an interesting finding is that those with higher education are less inclined to follow national and local news (respectively, 13% and 11% of their total choices), against those with lower education (respectively, 16% and 14% of their total choices).

Similarly, people with different financial situations do not have significantly different preferences for news topics, apart for those **with a comfortable financial situation, which are more likely to follow economy related news** (8% of their total choices against 5% of total choices of those living in an uncomfortable financial situation).

[50] For question **N5b**, respondents selecting "Other" mentioned a diverse range of content categories that are not traditionally included in standard options. These included **hobbies** (e.g., diving, fitness), **gaming** (e.g., eSports, Fortnite), **regional news**, **weather updates**, and **specific interest areas** like **science**, **climate**, **psychology**, and **cryptocurrency**. Some also listed entertainment-focused topics such as **music**, **cooking**, **anime**, and **fashion**. Several respondents mentioned not following any specific category or not having access to their preferred content.

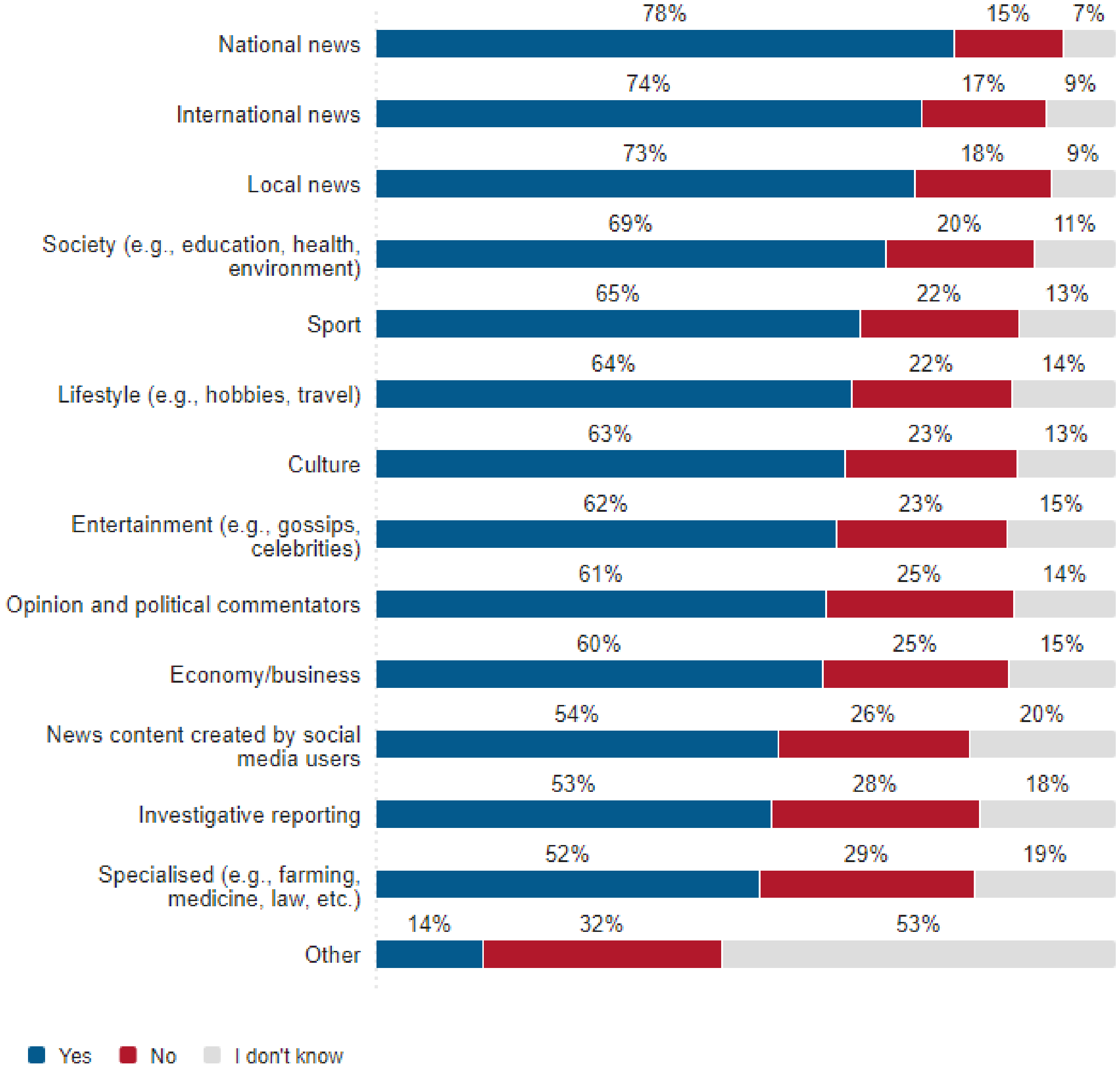
Question N5. Which topics do you spend the most time following? Please select all that apply. (n=21,501, 3.84 average clicks)



Variety of content

The majority of respondents think they access a sufficient variety of content, particularly in areas like national news (78%). **International news also scores highly**, with 74% expressing satisfaction. **Local news and society-related content (e.g., education, health) are similarly well-regarded**, with respectively 73% and 69% of respondents feeling they have access to enough variety. While **news content from social media users, investigative reporting, and specialised topics receive lower satisfaction ratings,** more than half of respondents remain satisfied with the overall variety of content available.

Question N6. For each of the categories listed below, do you have access to a sufficient variety of content in your life? (n=21,501)



Regarding the perception of the diversity of available content, younger individuals are less happy with the diversity of content they access. Among those under 30, 27% and 23% felt there was insufficient diversity for, respectively, local and national news, compared to only 12% and 8% of people over the age of 60. For political commentaries, international and sport-relared news, respectively, 34%, 25% and 26% of those aged 18-30 were not satisfied, against 18%, 12% and 17% of the over 60. Regarding differences across gender, man are more likely to believe there is insufficient diversity in content for entrtainment and lifestyle news (respectively, 27% and 25%, against 20% and 18% of women). In contrast, 26% of women reported insufficient variety of content for sports related news (26%, against 16% of men).

The value of journalism

A significant 44% of respondents believe that journalism plays a very or modestly positive role in democracy and society. 19% of respondents view news consumption as a form of consumption similar to other media activities, e.g. reading a book or watching television. One-fourth of respondents (25%) have a negative perception of journalism and consider that news is either mostly harmful and contributes to societal division, or that news spreads lies. This means that a sizeable part of the population harbours scepticism or outright distrust towards news media.

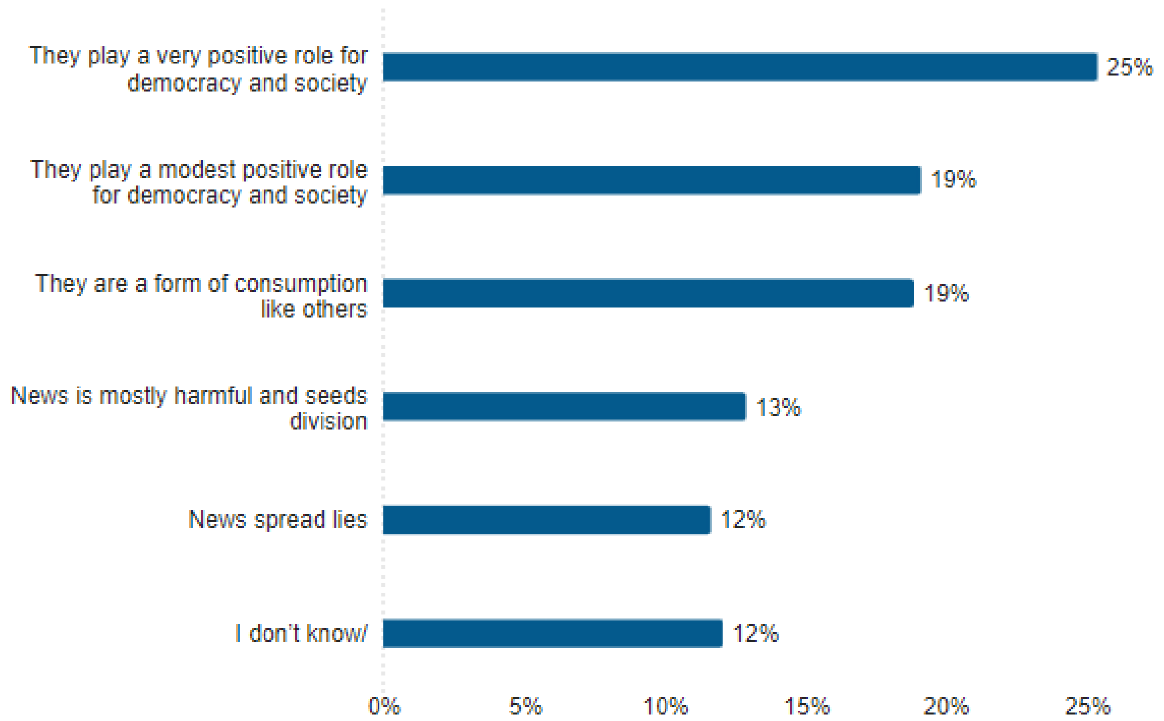
There appear to be no significant gender differences between the groups with positive and negative views on the news.

Those with a positive view of the news tend to be older: 41% of those aged 18–30 and 39% of those aged 31-40 express a positive view, compared to 40% of those aged 41-50, 46% of 51-60 and 52% of those over 60. Meanwhile, 25% of people aged 18-30 and 29% of those 31-40 have a negative view of news, against 28% of those aged 41-50, 23% of 51-60 and 20% of those over 60.

An uncomfortable financial situation is associated with having more negative views of news, with respect to those with a comfortable situation. 32% of those reporting to have an uncomfortable financial situation have a negative view, against 21% of both those able to meet their basic needs and those living comfortably. In contrast, 52% of those in a comfortable financial situation and 47% of those able to meet their basic needs have a positive view of journalism, against only 36% of those living uncomfortably.

Regarding education levels, **higher-educated respondents are more likely to see news reporting as playing a very or modestly positive role in society**, with 49% expressing this view compared to 38% of those with lower education. The share of people having a negative view of journalism is similar for both higher and lower-educated groups, respectively 33% and 36%. However, 19% of lower-educated respondents said not having an opinion, compared to only 7% of the higher-educated.

Question N7. Which of the following statements best reflects your views on news reporting and journalism? (n=21,501)



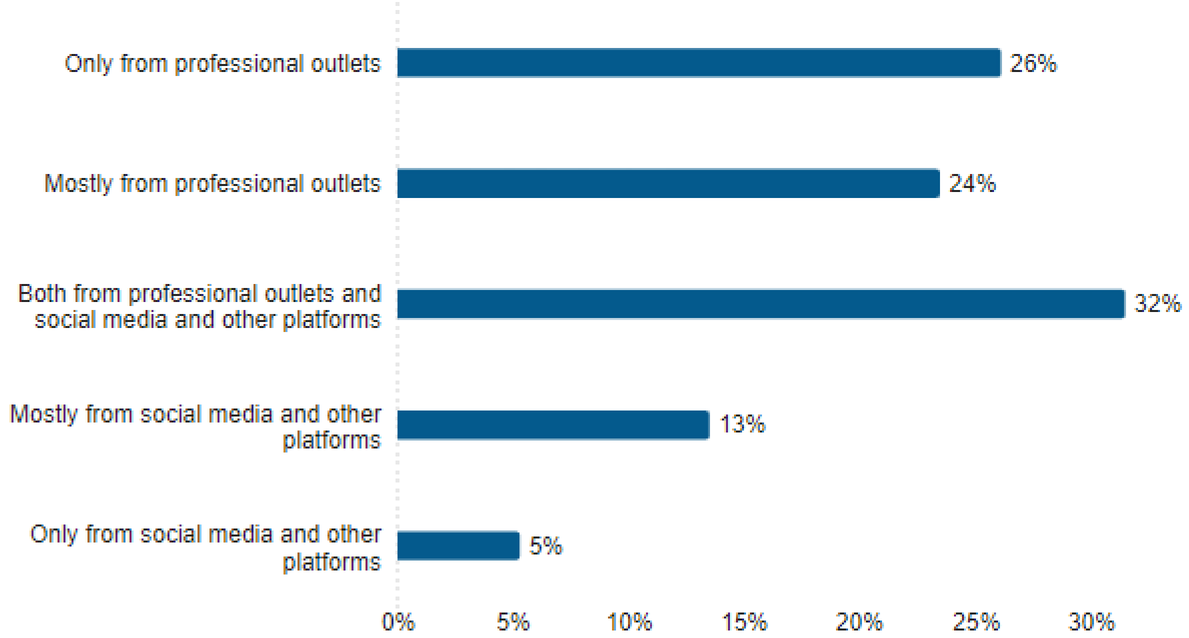
The role of professional journalism

This question analyses the role of professional journalism as a source of news. **Half of the respondents (50%) rely exclusively or mostly on professional outlets**, while 32% consume news from both professional outlets and social media or other platforms. 18% of respondents primarily get their news from social media and other platforms.

For age groups, older respondents, particularly those over 60, show a strong preference for getting their news exclusively or mostly from professional outlets, with 63% choosing this option. This preference gradually decreases with younger age groups, reaching only 34% among those aged 18-30. Younger respondents are more inclined to consume news from a mix of professional outlets and social media or other platforms, with around 35-37% of people aged between 18 and 50 indicating this mix. Additionally, younger groups show a higher reliance on social media, with 31% of those aged 18-30 leaning towards social platforms for their news, compared to only 11% in the over-60 group. However, even the youngest prefer to rely on a mix of sources or on traditional ones.

In terms of education levels, the differences are not significant in the choice of using only professional outlets or mixing professional and social sources. While reliance on mostly social media for news remains relatively low across all education levels, it is slightly more pronounced among lower-educated respondents.

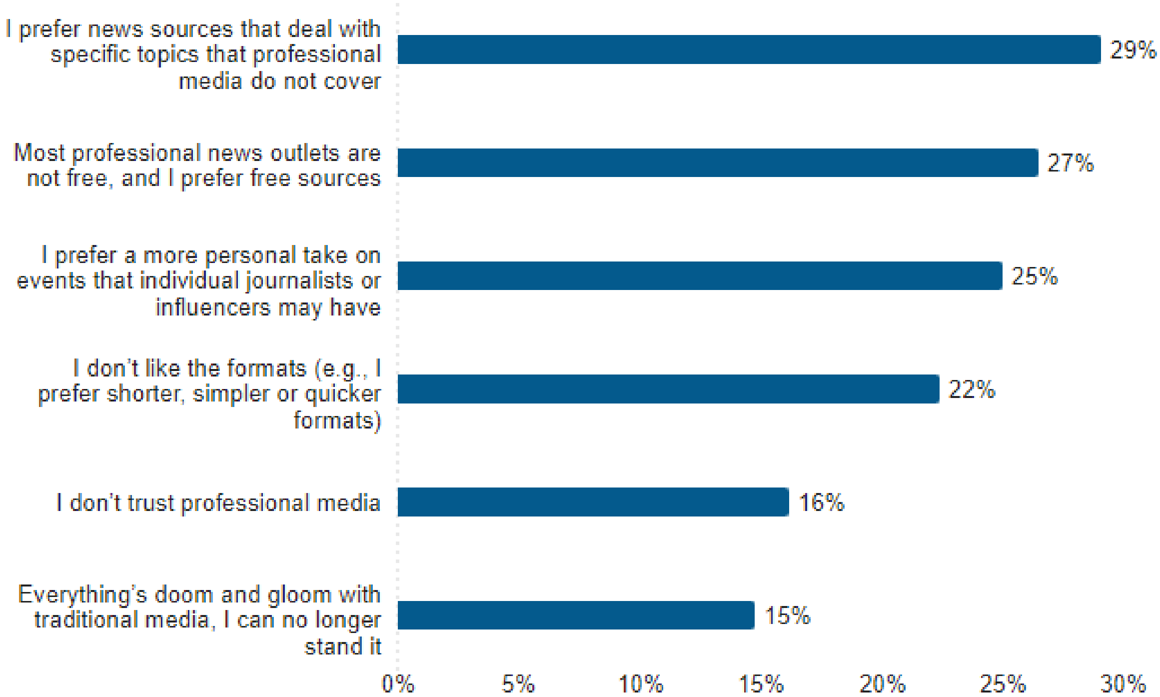
Question N8. Where do you primarily get your news? (n=21,501)



The role of social media

Respondents provided insights on their reasons to consume news media throughs social media platforms. The most cited reason, with 29% of respondents, is that **these platforms cover specific topics not addressed by professional media**. **Cost also plays a role**, with 27% of respondents choosing social media for news because it is free, in contrast to many professional news outlets. 25% appreciated the more personal perspectives offered by individual journalists or influencers and 22% the shorter and simpler format. Notably, **16% of respondents indicated distrust for professional media and 15% expressed that they cannot stand traditional sources of news,** as "everything is doom and gloom". When examining specific combinations, 12% of respondents stated they do not trust professional media, 11% shared that traditional media feels overwhelmingly negative, and a smaller overlap of 3% cited both reasons for an ovrall negative perception of 26%. These findings highlight how social media serves as an alternative for individuals dissatisfied with or distrustful of traditional news formats.

Question N9. What are the reasons why you follow the news on social media and other platforms? Please select all that apply. (n=17,211, 1.26 average clicks)[51]

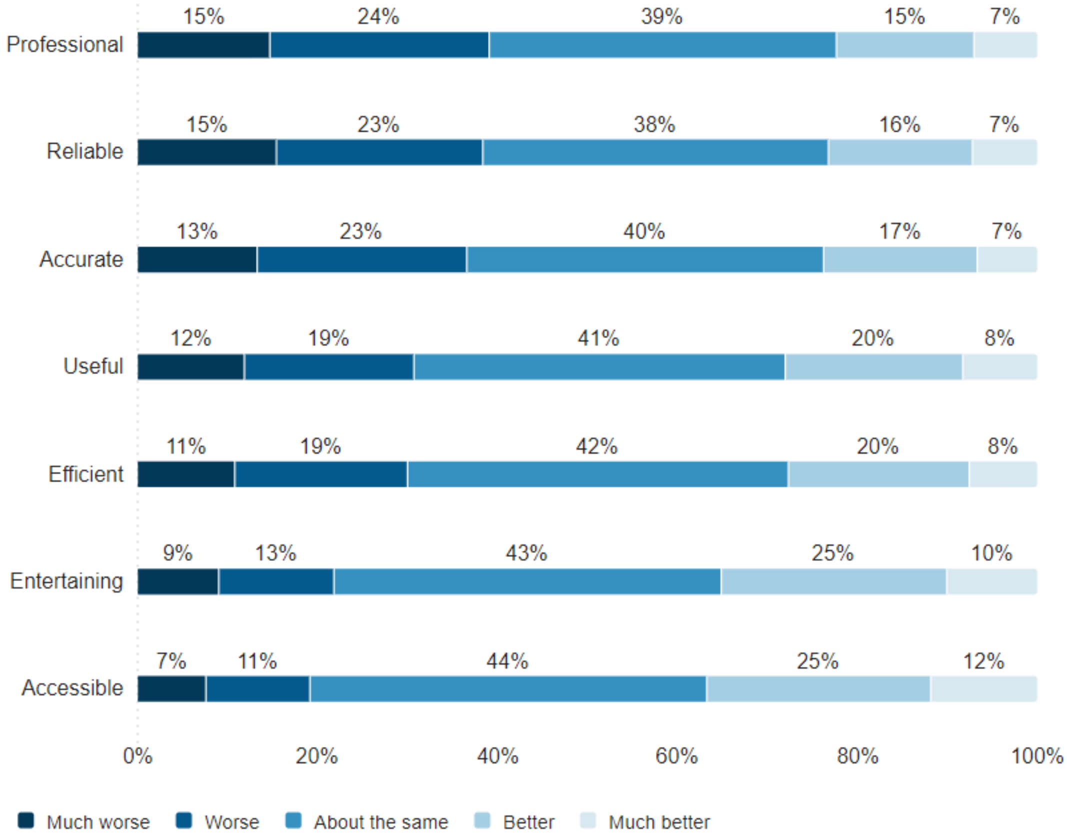


The value of User generated content (UGC)

Respondents rate content produced by other users online as better than journalistic media in several aspects. Traditional media ranks better in terms of reliability, accuracy, and professionalism. **User-generated content scores better than professional media in terms of accessibility and entertainment** (respectively, 37% and 35%).

[51] Question asked only if answer "Only from professional outlets" was not selected in question N8.

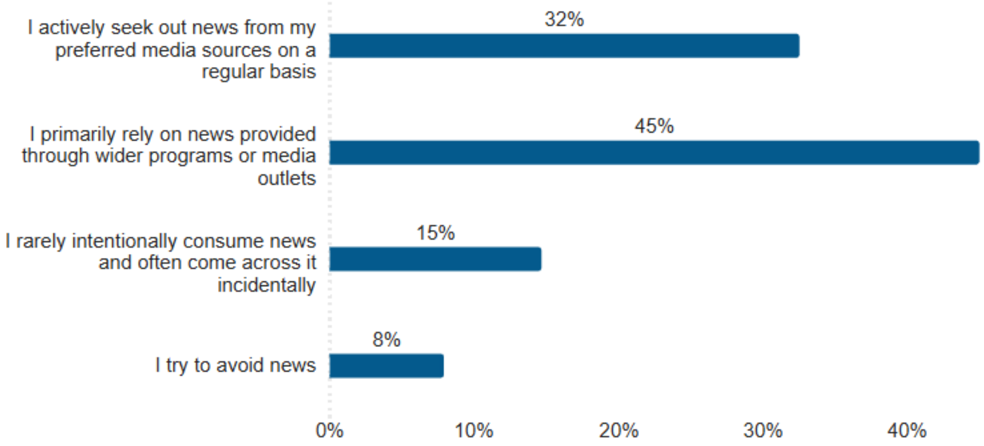
Question N10. Compared to journalistic media (TV, radio, press, etc.), how do you rate content produced by other users online (YouTubers, influencers, online users, etc.) in terms of the following aspects? (n=21,501)



Active/passive consumption of news

Respondents' behaviour in seeking out news varies. The largest group of respondents, 45%, relies primarily on news provided through wider programmes or media outlets, such as news bulletins. Another 32% actively seek out news from their preferred sources regularly, indicating a proactive approach to staying informed. However, 15% of respondents often come across news incidentally on social media or other platforms, rather than intentionally seeking it out. A smaller segment, 8%, actively tries to avoid news, highlighting a portion of the population that may feel overwhelmed or disengaged from current events.

Question N11. How actively do you typically seek out news sources? Please select the option that best reflects your usual behaviour. (n=21,501)



For age groups, older respondents (especially those over 60) are the most proactive in actively seeking news. About 35-36% of those aged 41-50, 51-60 and over 60 report regularly seeking news, compared to 24% and 31% of those aged, respectively, 18-30 and 31-40. Younger respondents are more inclined to rely on news provided through wider programs or media outlets, with 42% and 41% selecting this option within those aged 18-30 and 31-40, indicating a tendency to consume news passively. However, also older segments highly prefer this option, with 41%, 46% and 51% of preferences for the age groups 41-50, 51-60 and over 60, respectively. Additionally, younger groups have a higher tendency to encounter news incidentally on social media (25% in the 18-30 group) compared to just 8% among those over 60. The proportion of respondents who actively try to avoid news is low across all age groups.

Regarding education levels, higher-educated respondents are also more proactive, with 36% reporting that they actively seek news, compared to 26% of lower-educated individuals. Across all education levels, a significant proportion (about 44%-46%) relies on news from broader media programs, but the trend of incidental news consumption is somewhat higher among those with lower education (18%), compared to 14% of those medium-educated and 13% higher-educated. The tendency to avoid news altogether is more common among those with lower education levels (11%), compared to medium-educated (8%) and higher-educated respondents (5%).

Consumption and value

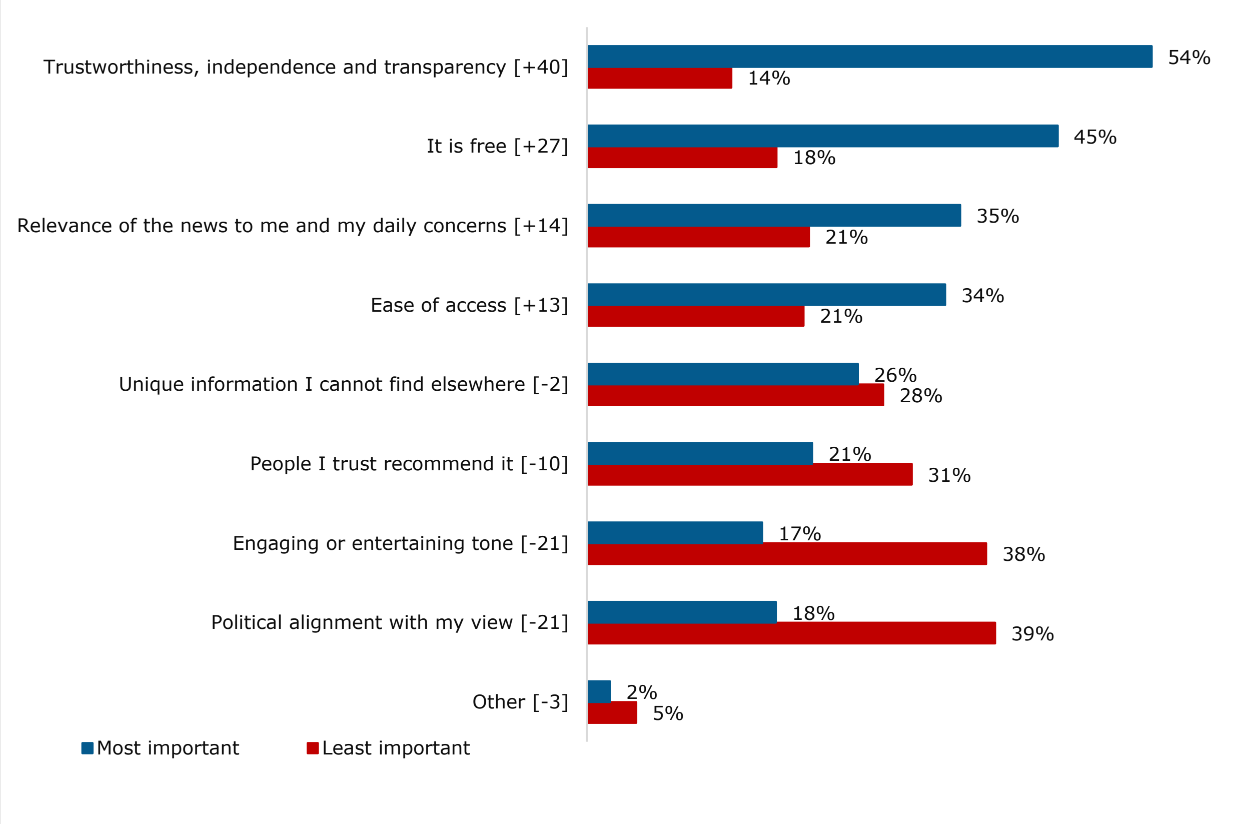
Respondents refer to trustworthiness, independence, and transparency as the most important factors in selecting their source of news, with 54% marking this as most important and only 14% viewing it as least important. This results in a net score of **+40 percentage points,** which is the highest among all the factors. The aspect of being free to access is also a significant consideration, with 45% identifying it as most important, while 18% see it as least important, yielding a net score of +27 percentage points.

The relevance of the news to personal and daily concerns is marked as most important by 35%, while 21% consider it least important, resulting in a net score of +14 percentage points. Similarly, ease of access is highlighted by 34% as most crucial, with an equal 21% deeming it least important, giving this factor a net score of +13 percentage points. On the other hand, the availability of unique information not found elsewhere is valued most by 26%, but also seen as least important by 28%, resulting in a net score of -2 percentage points.

Recommendations from trusted individuals are most important to 21% of respondents, while 31% view them as least relevant, producing a net score of -10 percentage points. **An engaging or entertaining tone** holds importance for 17%, but it is considered least important by 38%, leading to a net score of **-21 percentage points, the lowest among all options**. Political alignment with personal views also shows a polarising effect, with 18% finding it most crucial while an equal 39% mark it as least important, resulting in a net score of -21 percentage points.

Lastly, other factors[52] are identified as most important by 2% and least by 5%, giving a net score of -3 percentage points.

Question N12. Please indicate up to three least and three most important factors for you to select your source of news. (n=21,501, 2.37 average clicks)



Sources of trust

Public TV, including its online offerings, emerges as the most trusted news source, with 27% of respondents marking it as their most trusted and 12% considering it the least trusted. This results in the highest net score of +15 percentage points. Private TV, including online versions, is trusted by 9% as the most reliable source, while 6% view it as the least trusted, giving it a net score of +3 percentage points.

[52] For question N12, those selecting "Other" for their least and most important factors in choosing news sources provided a wide range of responses. Many emphasized factors like reliability ("honesty," "truthfulness"), accuracy, and lack of bias ("neutral," "non-manipulated"). Others mentioned personalization based on interests such as sports, health, or international news. Some responses highlighted preferences for news sources that are free or easily accessible, while others expressed distrust or disinterest in mainstream media. Several participants also indicated that they had no specific preference or did not know how to answer.

Public radio, including online, holds similar trust levels, with 10% identifying it as most trusted and 4% as least trusted, also yielding a net score of +6 percentage points. Private radio, including online, maintains a relatively balanced perception, with 5% marking it as their most trusted source and 4% seeing it as the least, resulting in a net score of +1 percentage points.

Digital news websites are also regarded positively, with 11% marking them as their most trusted source and 5% indicating them as their least trusted, leading to a net score of +6 percentage points. Similarly, the printed press is trusted by 9% of respondents as their preferred source, and 5% regard it as the least reliable, resulting in a net score of +4 percentage points.

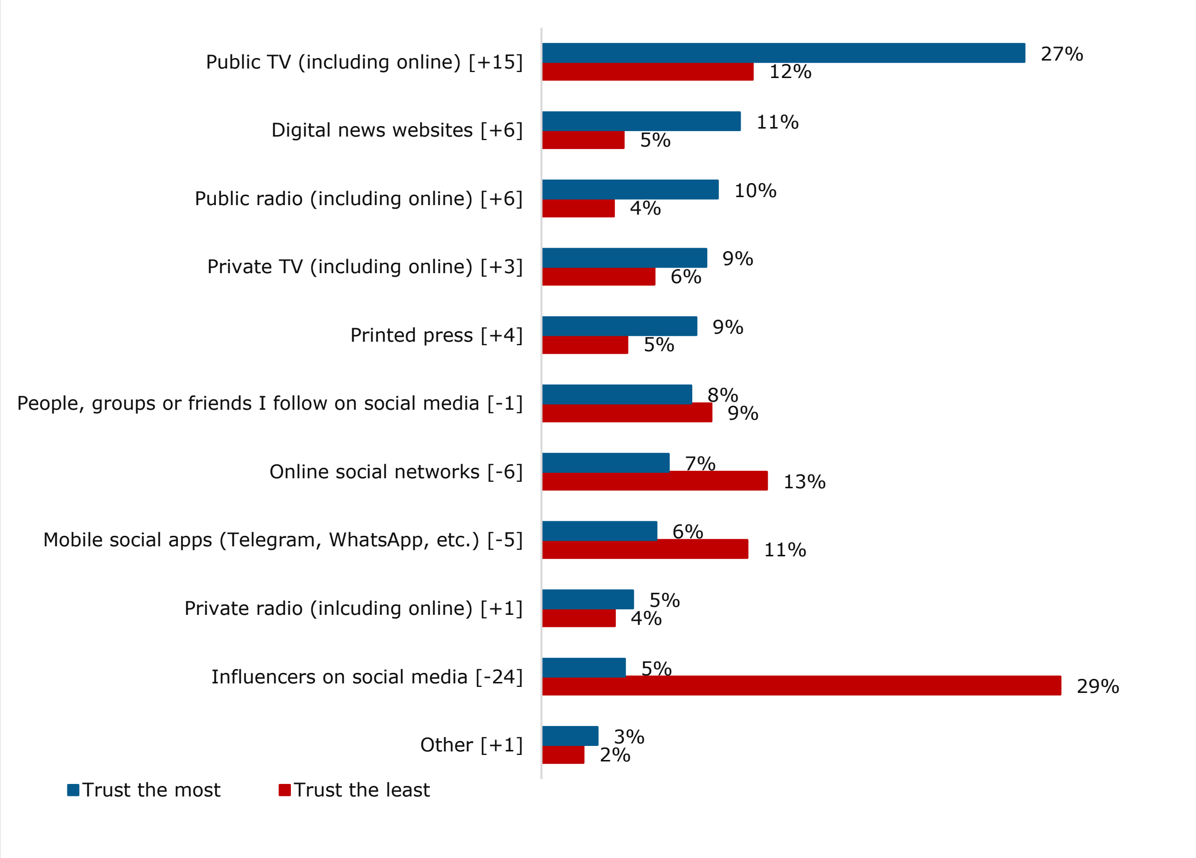
When it comes to social media sources, trust levels vary considerably. People, groups, or friends followed on social media are trusted the most by 8%, but 9% consider them the least trustworthy, leading to a net score of -1 percentage points. Online social networks are trusted the most by 7%, while 13% view them as the least reliable, giving a net score of -6 percentage points. Similarly, mobile social apps such as Telegram and WhatsApp are trusted by 6%, but 11% see them as the least trustworthy, leading to a net score of -5 percentage points.

Influencers on social media face a significant trust deficit, with only 5% identifying them as their most trusted source and 29% regarding them as the least trusted, leading to **the lowest net score of -24 percentage points**.

On average, net scores of traditional media (TV, radio, printed press and digital news websites) are positive, with a combined net score of +35 percentual points, indicating that traditional sources are still the most valued in terms of trust.

In contrast, net scores of social media sources (people, groups or friends followed on social media, online social networks, mobile social apps and influencers on social media) are negative, with a combined net score of -36 percentual points, showing that these sources are generally less relied upon and indicating a shift away from informal or peer-driven news sources.

Question N13. Which news source do you trust the least and which one the most? (n=21,501)

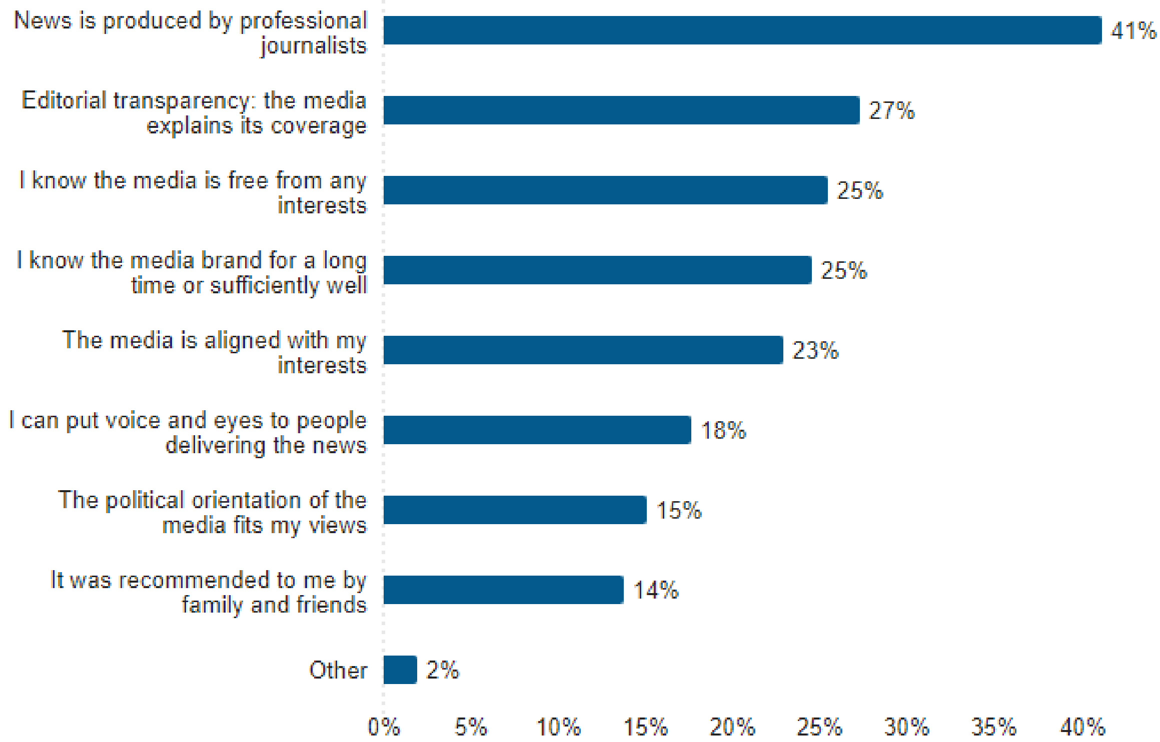


Drivers of trust

The factors that drive trust in media sources relate to professionalism and familiarity. A significant 41% of respondents trust news produced by professional journalists. Editorial transparency is also important, with 27% of respondents valuing media that explains its coverage decisions. Freedom from any vested interests and long-time knowledge of the brand are two important factors for 25% of the sample. Recommendations from family and friends and political orientation also play a role, but only for, respectively, 14% and 15% of respondents, indicating that **personal connections are less influential than the perceived credibility of the news source itself**.[53]

[53] For question **N14**, respondents who selected "Other" for what makes them trust media sources often highlighted **personal scepticism** and **independent verification**. Some mentioned that they **do not trust any media** at all, while others emphasized the importance of **honest and impartial journalists**. There were also references to **avoiding state-run media** and ensuring that sources face **backlash for misinformation**.

Question N14. What makes you trust the media sources you use to follow the news? Please select all that apply. (n=21,501, 1.93 average clicks)



Expenditure on news media

The relative majority of respondents consumed free news content or services online (40%) or accessed content behind a paywall without paying for it, e.g., via their school, university or employer (12%), over the last year, against those selecting to have paid for news. This suggests a **strong preference for freely available news sources**, which likely reflects the widespread availability of free content on the internet and the reluctance of some consumers to pay for news.

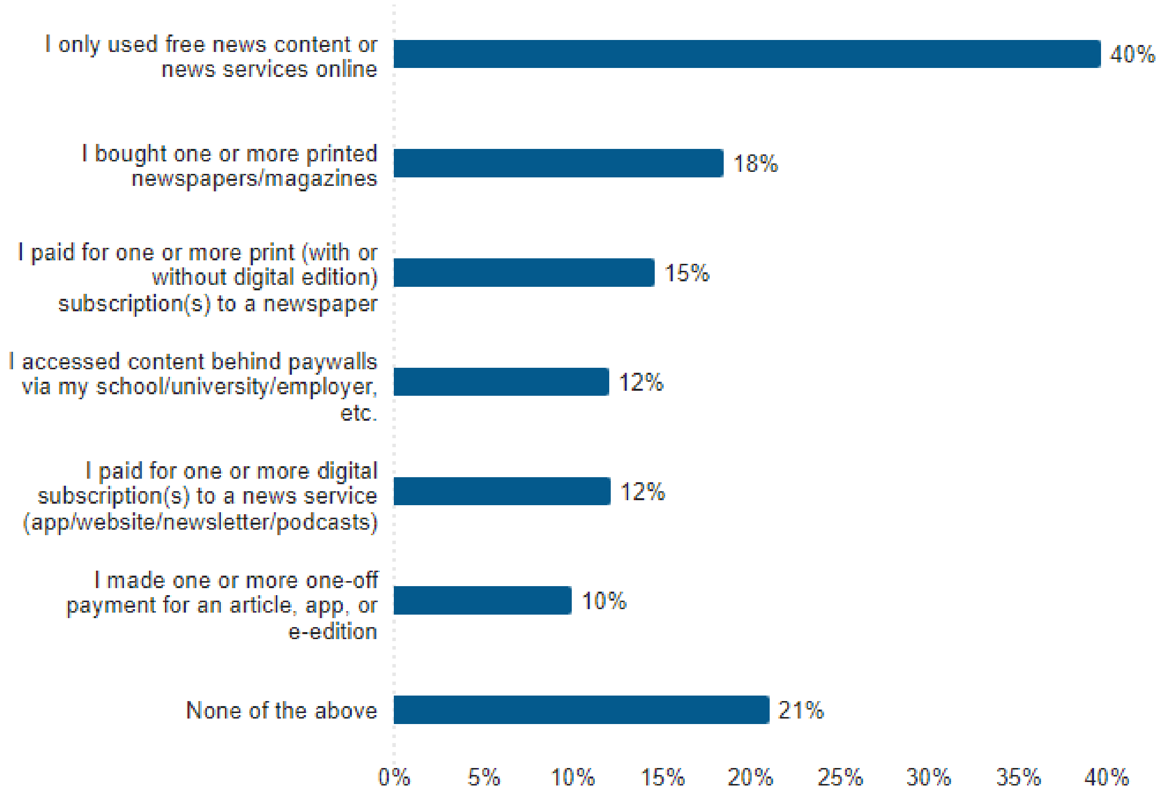
18% reported that they bought one or more printed newspapers or magazines over the past year. 15% of respondents paid for one or more print subscriptions which may or may not include digital editions. 12% stated that they have paid for one or more digital subscriptions to a news service, including apps, websites, newsletters, and podcasts, highlighting the shift towards digital platforms as primary sources of news. A smaller segment, 10%, made one-off payments for specific articles, apps, or e-editions. Interestingly, 21% of respondents indicated that they did not engage in any of these actions, suggesting either a lack of interest in paying for news or satisfaction with entirely free sources.

Among respondents, 41% reported paying for at least one form of news access in the past year, whether through digital subscriptions, print subscriptions, one-off payments, or purchasing printed newspapers/magazines. This calculation excludes respondents who exclusively accessed content behind paywalls via their school, university, or employer (5%), as well as those who relied entirely on free news content (32%). Conversely, 21% indicated that they did not engage with news content in any paid or unpaid form, relying instead on alternative sources (i.e., selected "None of the above"). Thus 59% of respondents reported never pay for news, encompassing those who rely exclusively on free news content, access via paywalls provided by institutions, or who do not engage with news content at all. The findings suggest that **while many consumers continue to rely on free content, there are still segments willing to invest in both print and digital news**, reflecting different values and preferences in how news is accessed and consumed.

Several key factors influence individuals' willingness to pay for news, including age, education, household composition, location, and income. Comparisons between different demographic groups highlight significant trends in news consumption habits. Considering only the 41% of people who pay for news:

a) Age. Younger individuals are more likely to pay for news compared to older age groups, with 46% of people aged 18-30 paying for news, against 42% of those aged 31-40, 38% of those 41-50, 35% of those 51-60 and 37% of the over 60.
b) Education. Higher-educated groups are also more likely to pay for news across various formats, with 49% paying for news, compared to 37% of the medium-educated and 30% of the lower-educated.
c) Household composition plays a modest role: 36% of those living with children and 43% of those living with adult(s) pay for news, compared to 21% of those living alone.
d) There is a significant difference in news payment habits between urban residents (54% pay for news) and those in towns (30%) or rural areas (15%).
e) Unsurprisingly, the financial situation is a strong predictor, with 54% of those reporting to live comfortably paying for news, 37% of those saying that their financial situation allows them to cover their basic needs and 32% of those reporting that their financial situation is uncomfortable.

Question N15. During the last year, did you do any of the following? Please select all that apply. (n=21,501, 1,3 average clicks)

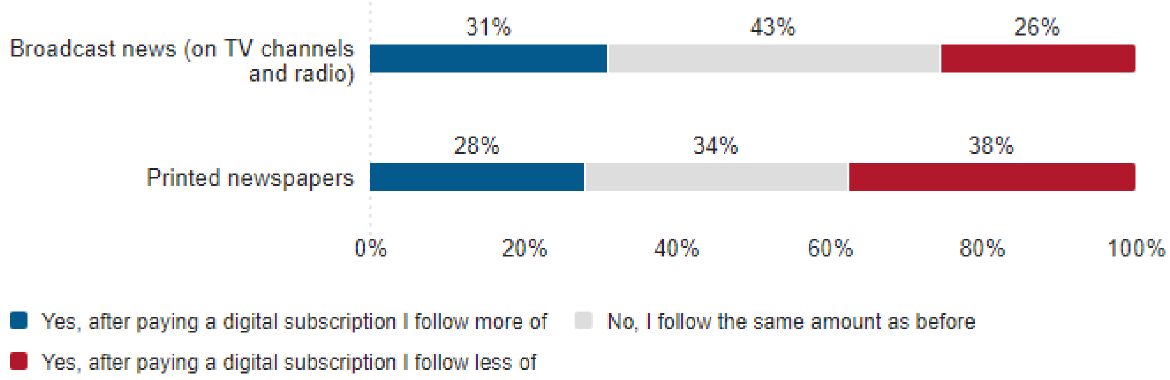


Subscription substitution effects

Digital subscriptions are seen as complementary to traditional news sources like TV and radio rather than a replacement. Among those who have paid for one or more digital subscriptions to a news service, a relative majority of respondents (43%) indicated that paying for a subscription did not change the amount of broadcast news they follow on TV channels and radio. 31% of respondents stated that they actually follow more broadcast news, which might indicate that digital subscriptions enhance overall engagement with news. On the other hand, 26% reported that, after subscribing to a digital news service, they follow less broadcast news.

When it comes to printed newspapers, 34% of respondents reported no change in their consumption habits after subscribing to a digital news service. However, the relative majority (38%) stated that they follow less printed news after subscribing to a digital service. Meanwhile, 28% of respondents said that they read more printed newspapers after paying for a digital subscription. Thus, similar to broadcast news, digital subscriptions do not limit traditional audiences.

Question N16. Has paying a digital subscription to an online news service changed your willingness to follow traditional broadcast news on TV channels/ radio or read printed newspapers? (n=3,283)[54]



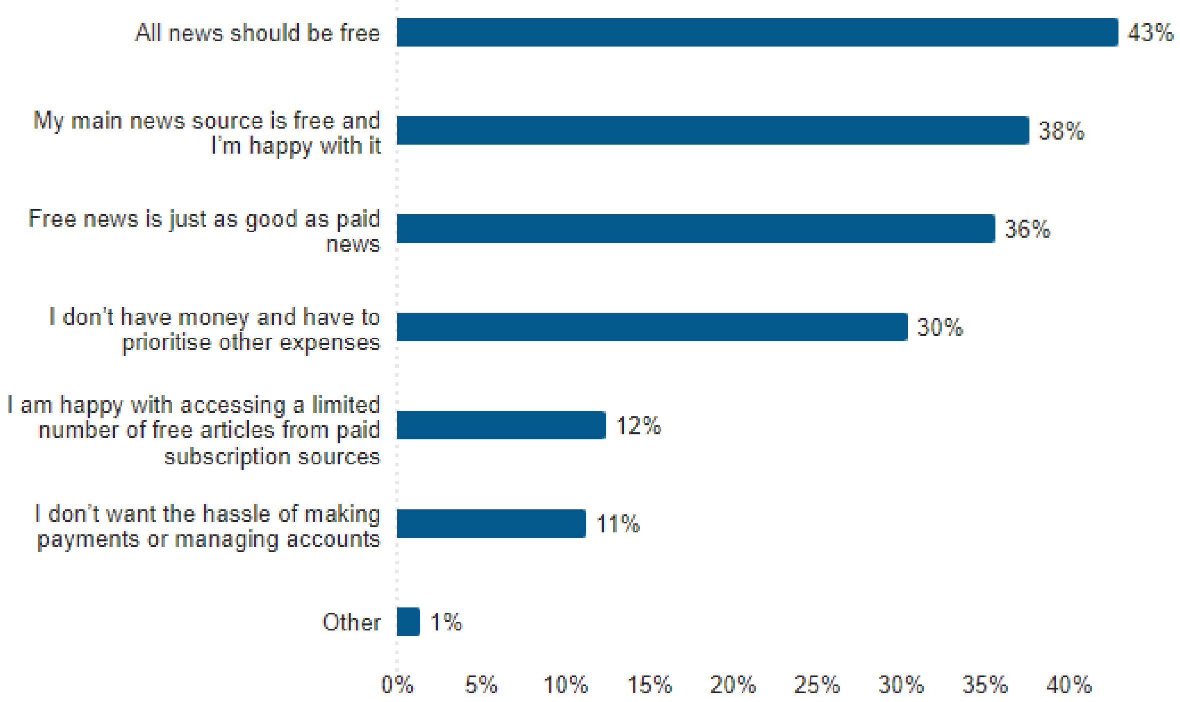
Resistance to news expenditure

Among those who choose not to pay for news services, **43% believe that all news should be free**. Another 38% are content with their main free news sources, and 36% feel that free news is just as good as paid news. Financial constraints also play a role, with 30% of respondents prioritising other expenses overpaying for news. A smaller segment (12%) is satisfied with accessing a limited number of free articles from paid sources, while 11% avoid payments due to the hassle of managing accounts.[55]

[54] Question asked only if answer "I paid for one or more digital subscription(s) to a news service (app/website/newsletter/podcasts)" was selected in question N15.

[55] For question N17, respondents who selected "Other" commonly cited lack of interest, distrust in media accuracy, and belief that news should be free. Some mentioned that they find free sources sufficient or that they avoid news entirely. Others expressed scepticism, perceiving paid news as biased or manipulated. Additionally, a few noted that they share accounts with others or access news through pre-existing subscriptions such as TV packages or public services.

Question N17. What are the reasons why you do not pay for news services? Please select all that apply. (n=11,781, 1.93 average clicks)[56]



Evolution of news consumption

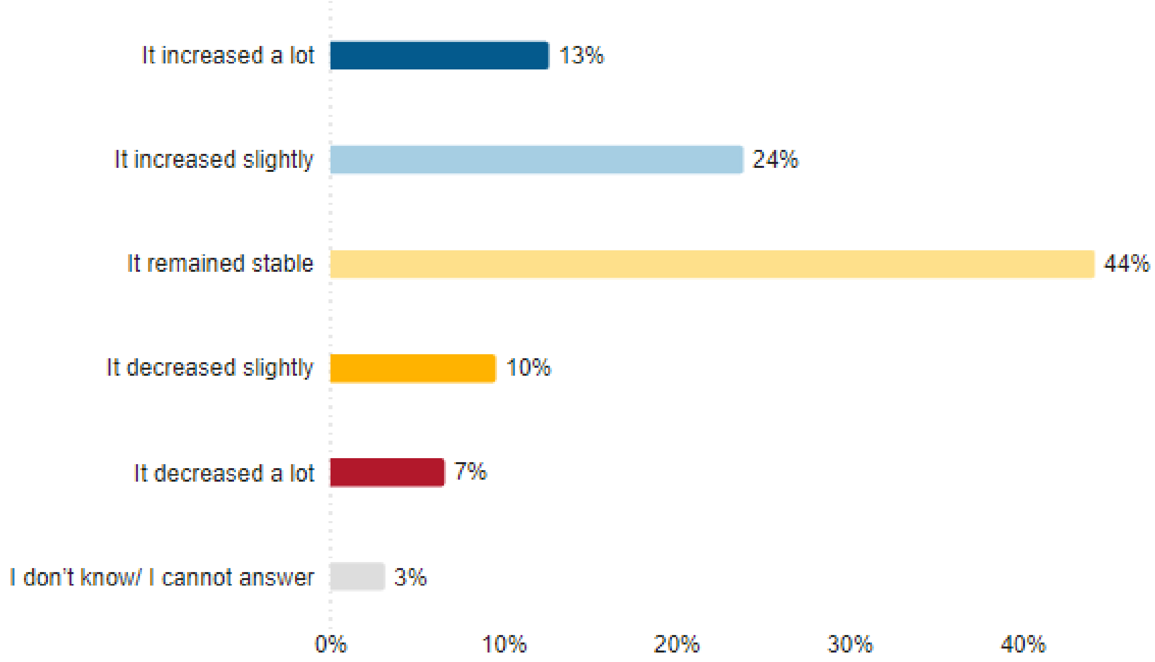
News consumption habits have remained relatively stable for many, but there is also a notable segment of the population that has adjusted its news consumption. Over the past two years, 44% of respondents reported that their overall news consumption has remained stable, against 37% that increased their news consumption and 17% that decreased it.

Across all education levels, the proportion of respondents reporting stable news consumption is relatively consistent, with 43% of higher-educated, 45% of medium-educated and 44% of lower-educated indicating no change. However, there are slight differences in trends for increased news consumption. Higher-educated respondents show a larger increase in their news consumption, with 40% indicating a slight or significant increase, compared to 36% for medium-educated and 31% for lower-educated respondents.

More respondents living in a comfortable financial situation reported to have increased their consumption of news, compared to those with lower levels of wellbeing. In particular, 43% of those living comfortably increased their news consumption, 41% reported stable consumption and 15% decreased it. In contrast, among respondents in a financial situation allowing them to meet their basic needs, 35% increased their consumption, for 48% it remained stable and 15% decreased it. Finally, 34% of respondents in an uncomfortable financial situation increased their consumption of news, 42% kept it stable, 20% decreased it and 4% could not answer.

[56] Question asked only if answer "I only used free news content or news services online" or "None of the above" was selected in question N15.

Question N18. In your opinion, has your overall consumption of news increased, decreased or remained the same in the last 2 years? (n=21,501)



Evolution of expenditure

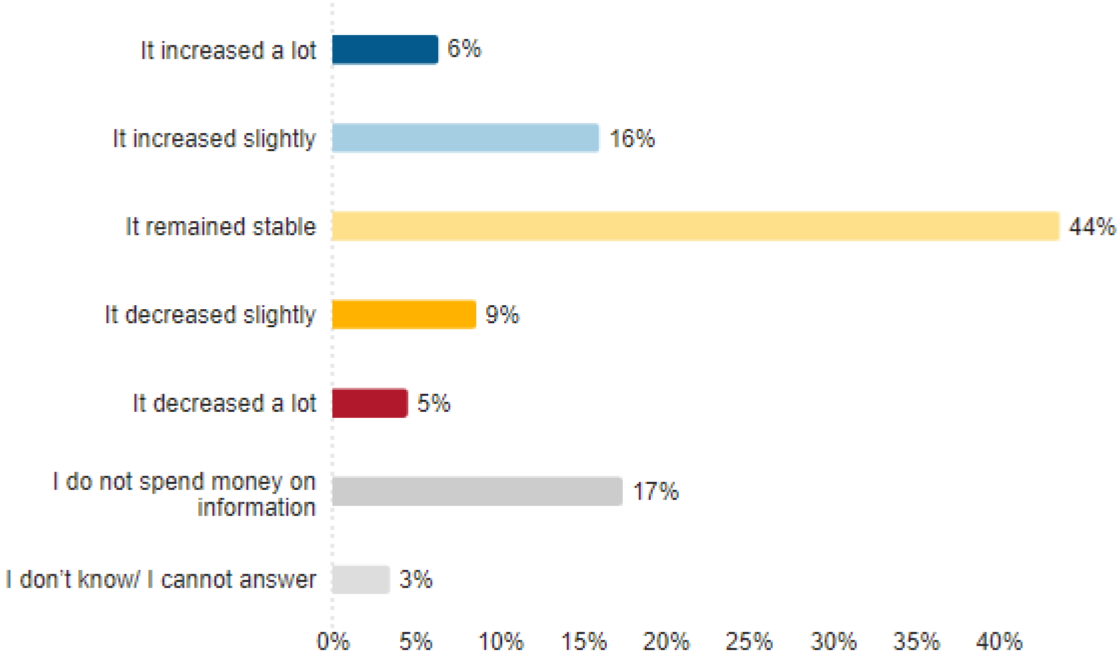
Expenditure on news has seen shifts over the past two years too. For 44% of respondents, spending on news has remained stable, while 22% have experienced a slight or significant increase in expenditure. On the other hand, 14% of respondents have reduced it.

Across all education levels, the majority of respondents report stable expenditure on information, with around 41% of lower-educated, 46% of medium-educated and 43% of higher-educated indicating no change. However, higher-educated respondents show a higher tendency to report an increase in spending. Among higher-educated individuals, 28% report an increase, compared to 21% for medium-educated respondents, and 16% for lower-educated respondents.

Lower-educated respondents are more likely to indicate that they do not spend money on information at all, with 23% selecting this option compared to 18% for medium-educated and 13% for higher-educated individuals. A small proportion in each group reports a decrease in expenditure, 16% for the lower-educated, 11% for the medium-educated and 13% for the higher-educated.

Unsurprisingly, more respondents living in a comfortable financial situation reported to have increased their expenditure on information, compared to those with lower levels of wellbeing. In particular, 32% of those living comfortably increased their expenditure, 41% reported stable expenditure, 13% decreased their expenditure and 11% did not spend money at all. In contrast, among respondents in a financial situation allowing them to meet their basic needs, 20% increased their expenditure, for 49% remained stable, 10% decreased it and 18% did not spend money at all for information. Finally, only 19% of respondents in an uncomfortable financial situation increased their expenditure for information, 38% kept it stable, 17% decreased expenditure and a significant 22% did not spend any money for information.

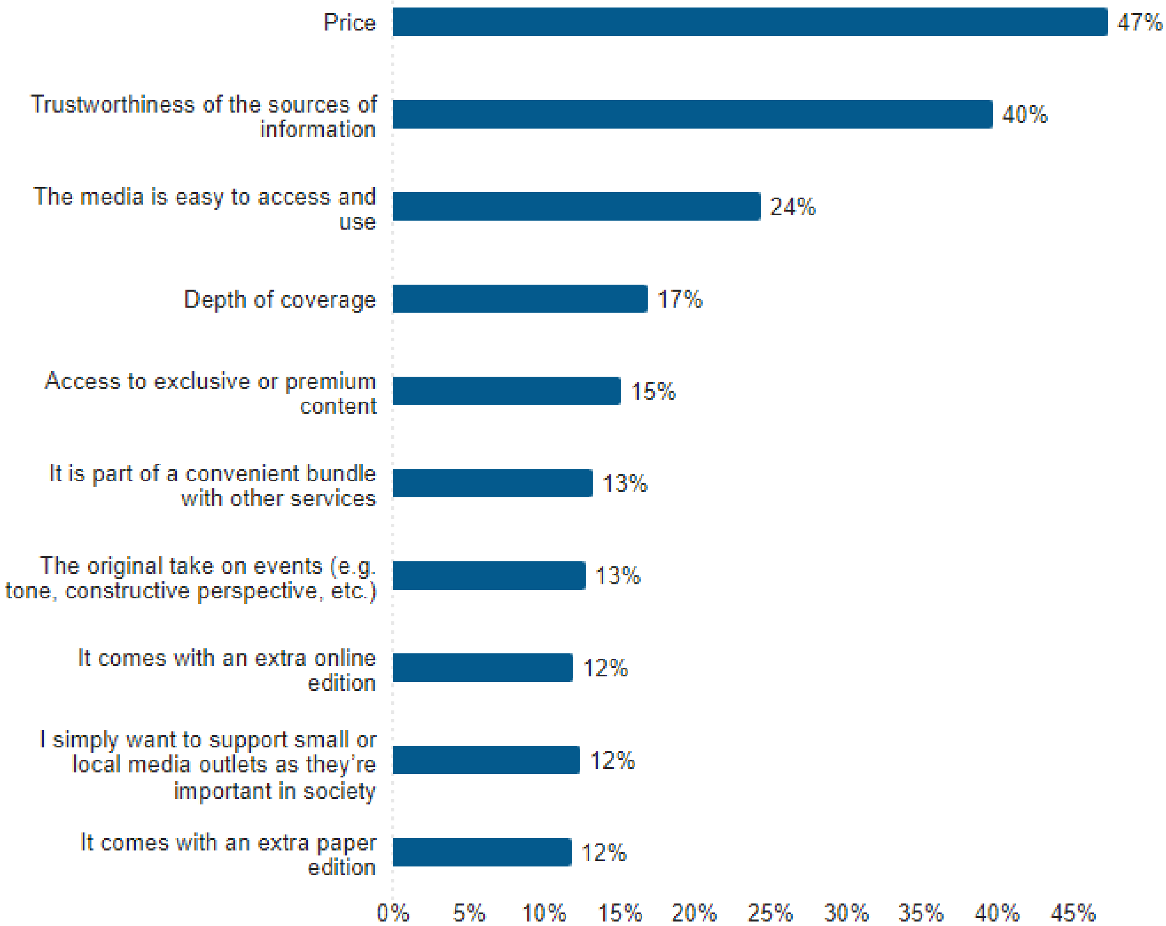
Question N19. In your opinion, has your overall expenditure on information increased, decreased or remained the same in the last two years? (n=21,501)



Drivers of expenditure

Price is the main driver influencing respondents' decisions when it comes to paying for news coverage, **cited by 47% of respondents.** If looking at different income levels, unsurprisingly, those in an uncomfortable financial situation are more prone to select price with respect to those living more comfortably (28% of total choices of those with a lower income, compared to 19% of total choices of those with a higher income). Following this, **trustworthiness is selected by 40% of respondents** as a significant reason for paying for news. Accessibility and easiness of use are other important factors, chosen by 24% of respondents. Supporting small or local media outlets and the possibility of having an extra paper or online edition are the least motivating factors, each chosen by 12% of respondents, and each preferred more by those living in a comfortable financial situation with respect to those living uncomfortably (respectively, 7%, 7% and 8% of total choices of those with a higher income against 6%, 4% and 4% of total choices of those with a lower income).

Question N20. In your opinion, what factors help you decide when paying for news coverage? Please select a maximum of 3 options. (n=21,501, 2.1 average clicks)



2.3.2. Vignette experiment

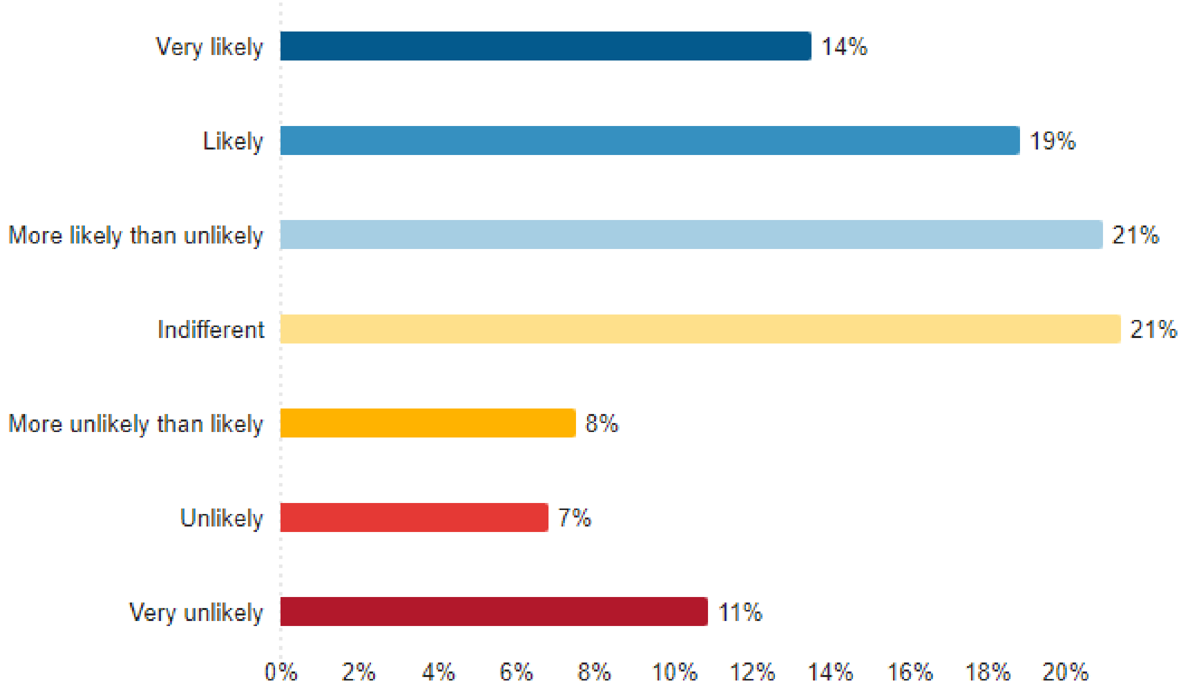
For this news media section, we conducted a specific methodology referred to as "Contrastive Vignette Analysis" to test how the presence of a logo/brand of a professional media outlet (e.g., "The Independent" icon) influences people's trust in online news content and their likelihood of using the news source in the future.

Willingness to share news online

First, respondents were asked about how likely they are to share the news they read with others on a scale from 1 to 7, where 1 indicates "Very unlikely" and 7 indicates "Very likely." **Most respondents (54%) indicated a moderate to high likelihood of sharing news**, with no significant differences in terms of their usual expenditure.[57]

[57] The correlation analysis between QV1 ("How likely are you to share the news you read with others?") and QN7 ("Which of the following statements best reflects your views on news reporting and journalism?") reveals a statistically significant but modest positive relationship ($r=0.0845$, $p<0.001$). This suggests that individuals with more favorable views on the role of journalism in democracy are slightly more likely to share news in their daily interactions. The correlation analysis between QV1 ("How likely are you to share the news you read with others?") and QN8 ("Where do you primarily get your news?") shows a statistically significant negative relationship ($r=-0.0354$, $p<0.001$). In this analysis, QN8 is coded on a scale from 1 to 5, where 1 represents "Only from social media and other platforms" and 5 represents "Only from professional

Question V1. In your daily interactions, how likely are you to share the news you read with others on a scale from 1 to 7, where 1 indicates "Very unlikely" and 7 indicates "Very likely"? (n=21,501)



Then, respondents were informed that they would be shown a piece of news in the next questionnaire page and that they had to pay attention as questions about the content of the news would follow.

Respondents were randomly presented with one out of 3 versions of the vignette

- item with NO logo,
- item with a generic, invented logo "The News logo",
- item with a professional brand. A logo of one popular professional outlet website for each Member State[58] was selected to be placed in the third version of the vignette.

Please find below the three versions of the vignette shown to respondents based in Ireland:

outlets," with intermediate values reflecting increasing reliance on professional outlets. This indicates that individuals sourcing their news primarily from social media or other platforms are marginally less likely to share news compared to those relying on professional outlets.

[58] Example available at: https://www.statista.com/statistics/442988/most-visited-news-websites-germany/ and https://www.semrush.com/website/top/global/news-and-media/

Figure 3. Three versions of the vignette shown to Irish respondents

Source: Author's elaboration

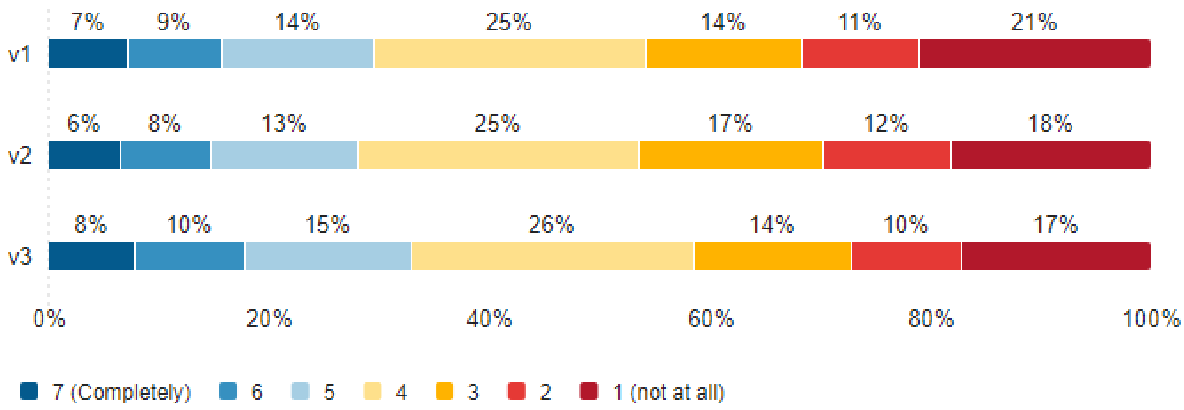
Then, respondents were asked to rate how much they trusted that the news presented in the vignette was true, using a scale from 1 (Not at all) to 7 (Completely).

Results

The presence of no icon (v1), of an invented icon (v2) and of an icon of the main online news outlet in the country of origin of the respondent (v3) seems to have had a slight effect. Indeed, while 46% and 47% of people who saw respectively v1 and v2 expressed little trust, the share of distrust between those who saw the vignette with the news outlet logo decreased to 41%, a difference that is statistically significant, showing marginally more trust in the news item.

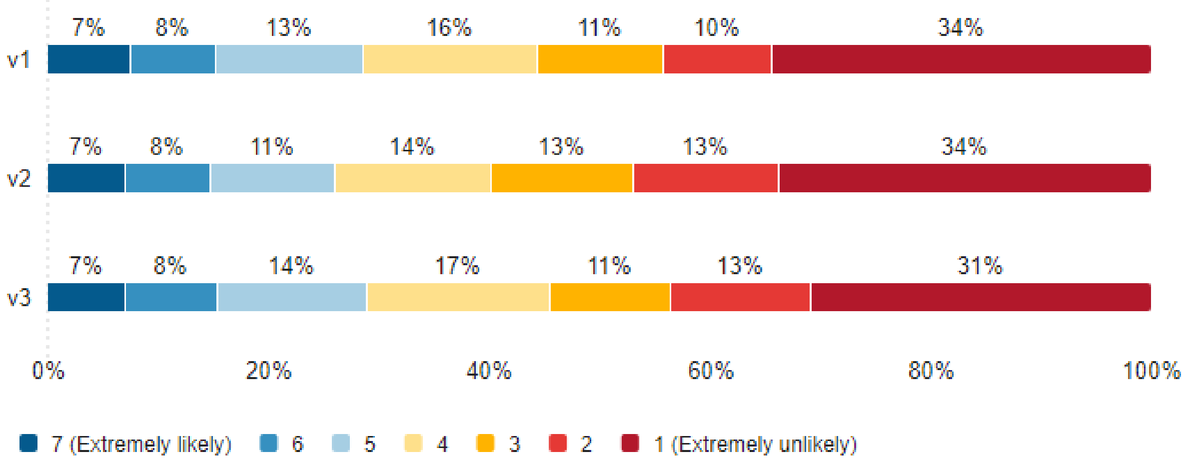
While some respondents were sceptical, many were inclined to trust the news to some extent, respectively 30% for v1, 27% for v2 and 33% for v3. A recognizable news icon (v3) led to the highest trust ratings, with 33% of respondents selecting scores of 5 to 7 on the trust scale. This represents a 3 percentage points increase in trust compared to the condition with no icon (v1), where 30% of respondents rated the news similarly, and a 6 percentage points increase compared to the invented icon (v2), which saw 27% of respondents giving high trust ratings. These results suggest that including a familiar and reputable news icon can positively influence perceived credibility in news content.

Question V2. On a scale of 1 to 7, where 1 is 'Not at all' and 7 is 'Completely', how much do you trust that the news presented in the image is true? (n=21,501)



Respondents were asked how likely they were to share the specific news item they had just viewed. The responses were spread across the scale, but **most respondents indicated they were unlikely to share this news piece**, **with little differences across the three groups watching different vignettes,** respectively 55% for v1, 60% for v2 and 55% for v3. T**he presence of a professional outlet logo did not affect the willingness to share**.

Question V3. Considering the news item you have just viewed, how likely are you to share this news with others on a scale of 1 to 7, where 1 is 'Extremely unlikely' and 7 is 'Extremely likely'? (n=21,501)



Impact of Brand Perception on Trust and Willingness to Share News Content

Respondents that were shown v3 (actual logo) reported their trust levels on the brand shown in the vignette. They were then segmented into three groups based on their reported trust levels. This segmentation helps understand how brand perception influences their trust and willingness to share content (Questions V3 and V4). The groups are as follows:

- Group 1. Trust the Brand: Respondents who selected values 6 or 7, represent individuals with a high level of trust in the brand.
- Group 2. Indifferent to the Brand: Respondents who selected values 3, 4, or 5, reflect a neutral or ambivalent stance towards the brand.

- Group 3. Do Not Trust the Brand: Respondents who selected values 1 or 2, express minimal to no trust in the brand.

The brand trust score was positively correlated with two other responses: (1) the likelihood of sharing the specific news item they viewed, and (2) the perceived truthfulness of the news content.[59] In other words, higher trust in the displayed brand was associated with greater confidence in the accuracy of its news and an increased willingness to share it with others. This finding suggests that a trusted brand can significantly enhance not only the perceived credibility of individual news items but also the likelihood of audience engagement through sharing.

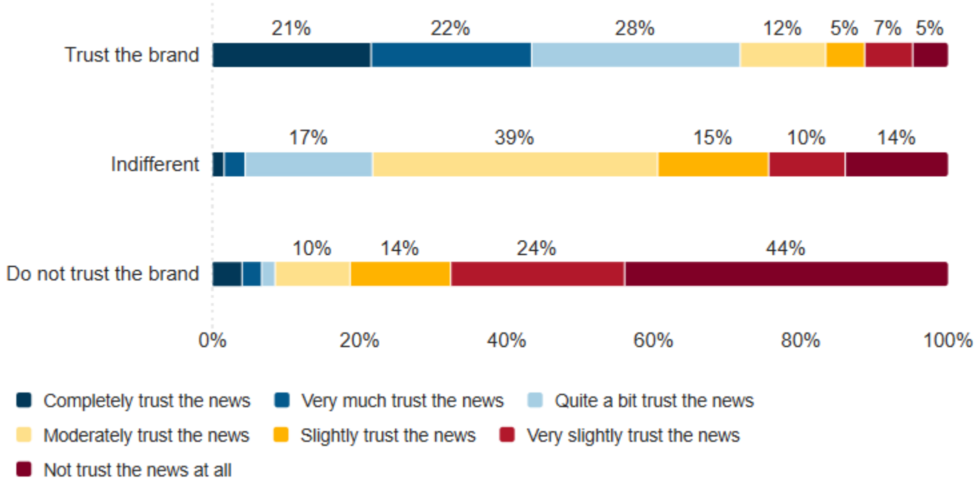
Those who trust the brand are more likely to view the news as credible and share it, showing a positive correlation between brand trust and content engagement. In contrast, respondents indifferent to the brand exhibit a neutral stance, with their responses more evenly spread across the trust and sharing scales, suggesting other factors influence their behaviour. Those who do not trust the brand predominantly view the content as untrustworthy and show a low willingness to share it, indicating a strong negative spillover effect of their brand perception on their content evaluation and sharing behaviour.

Specifically, the analysis of the perceived trustworthiness of the brand (question V3) reveals distinct patterns across these groups. Respondents who trust the brand show a strong positive correlation between their brand perception and the credibility of the content, with a mean score of 5.31, indicating that they are much more likely to perceive the news as credible. In contrast, the indifferent group shows a balanced distribution across the trust scale, reflected by a mean score of 3.68, with no strong inclination towards either trusting or distrusting the content. This neutrality suggests that their content evaluation is aligned with their brand perception. Those who do not trust the brand have a mean score of 2.10, predominantly rating the content as untrustworthy, indicating a negative spillover effect from their perception of the brand onto their evaluation of the news item.

Overall, the findings indicate that **respondents' trust in the brand significantly impacts** both their perception of content credibility and their willingness to share it.

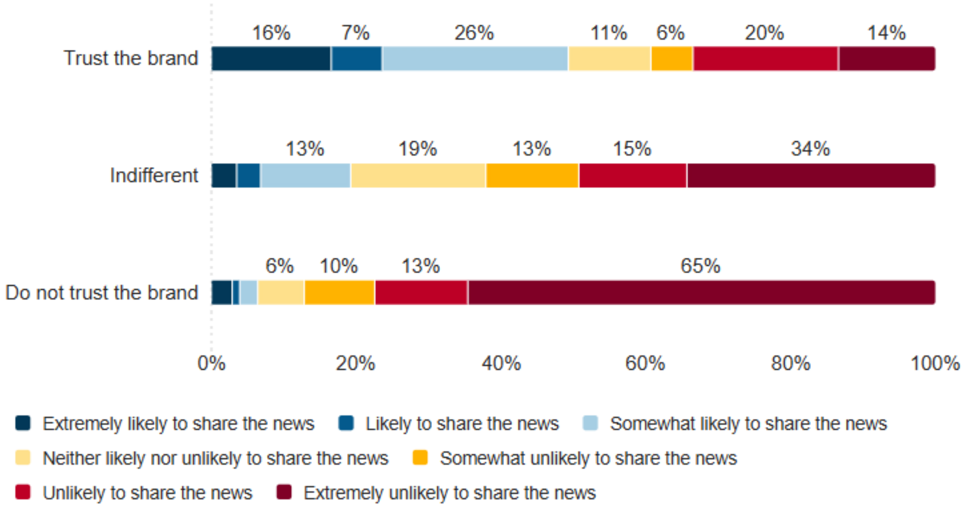
[59] Specifically, brand trust showed a moderate-to-strong positive correlation with the likelihood of sharing the news (Spearman's rho = 0.512, $p < 0.001$) and a strong positive correlation with the perceived truthfulness of the news (Spearman's rho = 0.601, $p < 0.001$).

Question V4. Relation between trust in the news item and brand perception. (n=7,207)[60]



Cross-referencing these groups with responses about their willingness to share the news (question V4) highlights consistent trends. Those who trust the brand have a mean sharing score of 4.80, showing that they are significantly more likely to share the content. The indifferent group has a mean score of 3.10. Those who do not trust the brand show a low likelihood of sharing the news, with a mean score of 1.80, indicating that their mistrust directly translates into an unwillingness to engage with or disseminate the information.

Question V5. Relation between willingness to share the news item and brand perception. (n=7,207)[60]



The data reveal a statistically significant, relationship between age group and perceived trustworthiness across the three vignette conditions: v1 (No Icon), v2 (Invented Icon), and v3 (Recognizable News Icon). Across the vignettes, a pattern emerges where younger respondents tend to report higher trust levels than older respondents, regardless of the vignette's branding element. However, v3 (Recognizable News Icon) consistently generated slightly higher trust across age groups, indicating that a trusted brand can positively influence perceived trustworthiness. This trend suggests that while demographic

[60] Analysis performed only for respondents who were shown v3.

factors like age influence trust, the presence of a recognizable brand also plays a role in enhancing credibility, also among older audiences.

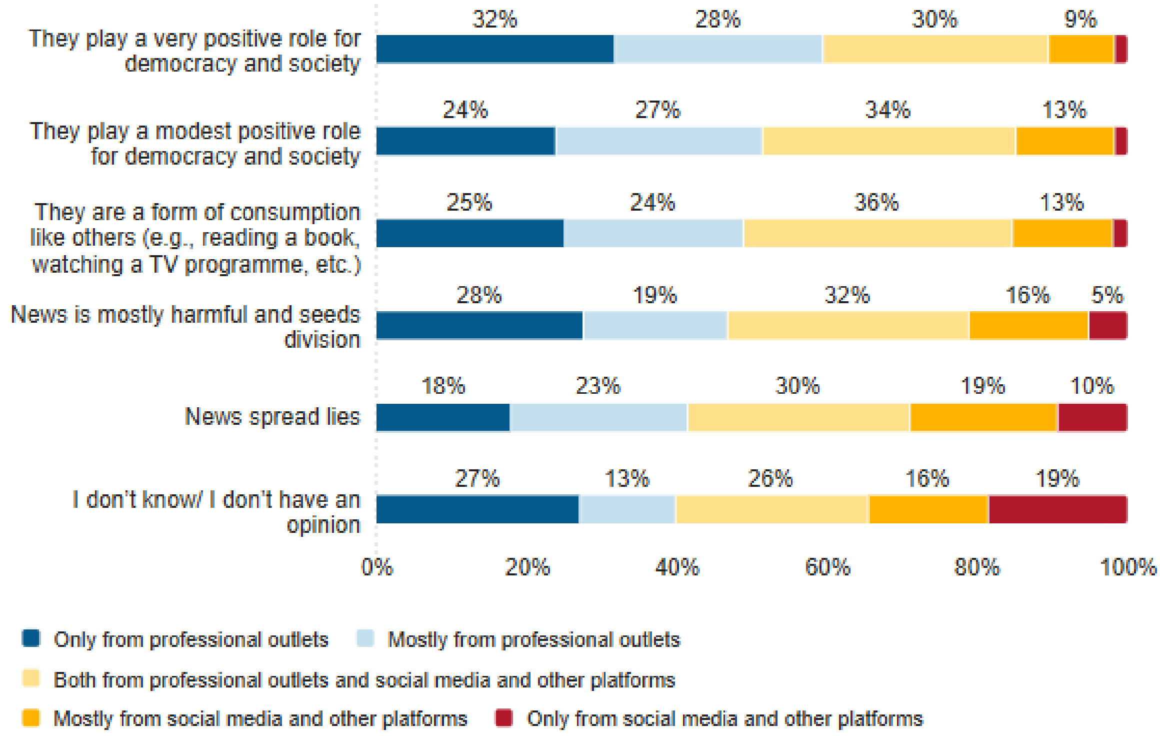
2.3.3. Further assessment of results

Trust and usage of professional media

In line with the results of the vignette experiment, there are correlations between trust in news and the use of professional news outlets.

Respondents viewing news more positively tend to rely on news from professional sources, while those who distrust news content tend to rely more on social media and other non-professional platforms.

Relation between view of news (question N7) by preferred type of news source (question N8)



A clear pattern emerges showing that as trust in news decreases, reliance on professional outlets decreases as well.

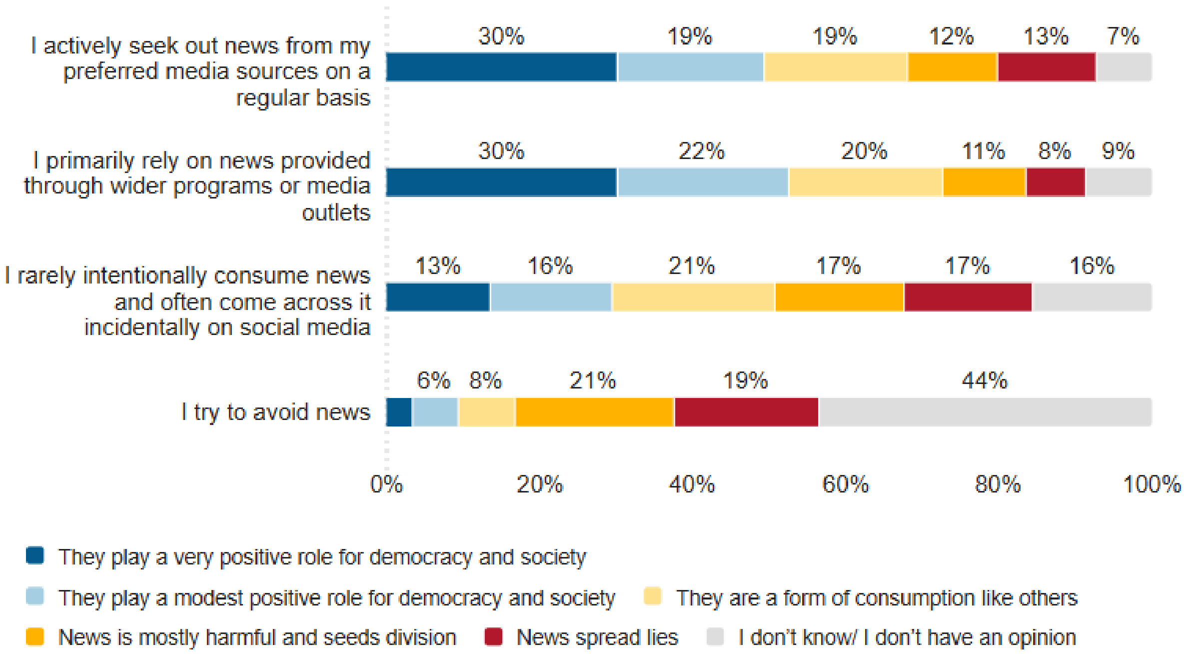
a) 60% of respondents who believe that news plays a very positive role in society and 51% of those who said news has a modest positive role primarily consume news from professional outlets. In contrast, 47% of those who view news as harmful and 41% of respondents who consider news to spread lies rely on professional outlets for their news consumption.
b) At the same time, as respondents' trust in news decreases, their use of social media and other non-professional platforms slightly increases. For instance, 53% of those who view news as harmful and 59% of respondents who consider news to spread lies rely on social media or a mix of professional outlets and social media for their news consumption In contrast, 40% of respondents who believe that news plays a very positive role in society and 49% of those who said news have a modest positive role primarily consume news from social media or a mix of sources. This

suggests that **people with lower levels of trust tend to be those who also rely on non-professional or user-generated content**.

Actively seeking news is associated with a more favourable perception of its value. Among individuals who actively search for news, 49% expressed a positive view of journalism and 25% a negative view. In comparison, those who primarily rely on news embedded within broader programming have a slightly higher proportion, with 52% reporting a positive view and 19% a negative view.

However, the **perception significantly declines among those who are less intentional in their news consumption**. Only 29% of individuals who rarely seek out news reported holding a positive view, against 34% who have a negative view. This downward trend is even more pronounced among those who actively avoid the news, with just 9% expressing a positive perception and a significant 40% a negative one.

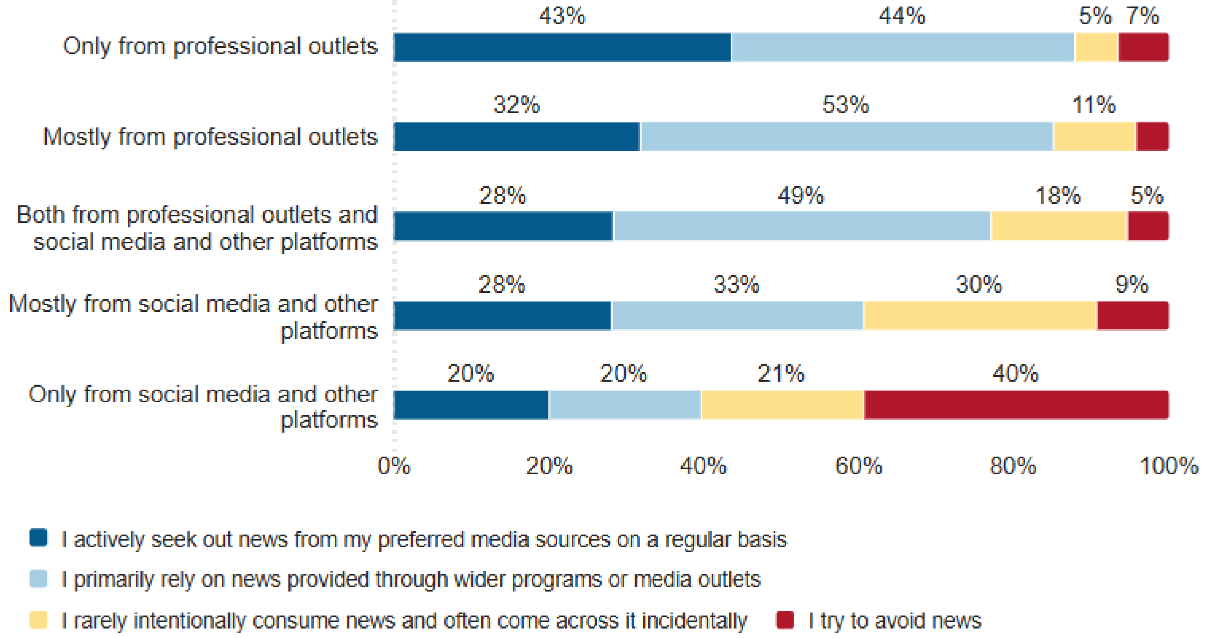
Relation between news seeking behaviour (question N11) and view of news (question N7)



Finally, the findings reveal a strong connection between preferred news sources and the likelihood of actively searching for news. **Preference for professional news sources correlates with a higher likelihood of actively seeking news, while reliance on social media is linked to more passive consumption patterns.** Among respondents who rely exclusively on professional news sources, 43% actively seek out news, and 44% primarily rely on news embedded within broader programming. In contrast, only 5% engage in passive news consumption and 7% try to avoid news. Among those who rely exclusively on social media and other platforms, 20% actively search for news, another 20% rely on news provided through other programs, 21% passively consume news and an outstanding 40% actively try to avoid news.

For individuals who rely on a mix of both professional and non-professional news sources, 28% actively search for news and 49% get their news embedded within broader programming. The rate of passive consumption rises to 18% and 5% try to avoid news, indicating a more balanced approach.

Relation between preferred type of news source (question N8) and news seeking behaviour (question N11)



Primary source of news and levels of trust

Individuals with a **positive view of news**, defined as those who believe news plays a very positive or modestly positive role for democracy and society, are **more likely to consume news via TV on-air or cable** (50%) **and TV online** (53%) compared to those with a negative view (20% and 21%, respectively).

Those having positive views are also more inclined to access printed press (57%) and news websites or apps (53%) compared to those with negative views (18% and 20%).

Individuals with a positive view of news are also more likely to consume news via social media (e.g., Facebook, Instagram, etc.), compared to those with negative view (40% and 27%), although the difference is noticeably smaller.

Overall, individuals with a positive perception of news show **higher consumption across all sources** compared to those with a negative perception, indicating a broader engagement with diverse news platforms.

In terms of the relationship between the primary sources of news and levels of trust in different news outlets, public television is in general the most trusted source except for those exclusively relying on social networks. There is a general correlation between the usage of a certain type of news (professional vs non-professional) and the trust levels.

a) **For those who consume news exclusively from professional outlets, public television is the most trusted source**, with 40% of respondents favouring it. Other professional outlets, like printed press (10%), private television (11%), and public radio (11%), also enjoy relatively high levels of trust. Digital news, private radio, social media sources and influencers receive lower trust scores, with mobile social apps being the least trusted at 3%.
b) **Those who primarily rely on professional news outlets also show the highest trust in public television** at 26%, followed by digital news (14%) and printed press (11%). There is a more distributed trust pattern compared

to exclusive reliance on professional outlets, but influencers remain the least trusted source at 4%.

c) **For individuals who consume a mix of professional and social media news sources,** public television remains the most trusted at 22%. However, there is a noticeable increase in trust for social media platforms, with 10% of respondents favouring "people on social media" and 8% trusting mobile social apps. Private radio, at 5%, emerges as the least trusted source in this group.

d) **Among respondents who mostly rely on social media and other platforms, the trust distribution changes significantly**. Public television still holds the top spot at 18%, but there's a sharp rise in trust for social media sources like people on social media (15%) and mobile social apps (9%).

e) Finally, **for those who rely exclusively on social media and other platforms, people on social media are the most trusted source**, with 17% of respondents indicating their preference. Trust in traditional outlets like public television decreases to 14%. Printed press receives the lowest trust score at 5%.

Table 1. Relationship between the primary sources of news and levels of trust in different news outlets

Category of most trusted news source	Only from professional outlets (%)	Mostly from professional outlets (%)	Both (%)	Mostly from social media (%)	Only from social media (%)
Public TV (including online)	0.40	0.26	0.22	0.18	0.14
Private tv (including online)	0.11	0.11	0.09	0.06	0.07
Public radio (including online)	0.11	0.11	0.09	0.08	0.08
Private radio (including online)	0.05	0.05	0.05	0.05	0.06
Online social networks	0.04	0.05	0.08	0.15	0.13
Mobile social apps	0.03	0.05	0.08	0.09	0.09
Influencers on social media	0.04	0.04	0.05	0.07	0.05
Digital news websites	0.08	0.14	0.13	0.09	0.06
Printed press	0.10	0.11	0.08	0.05	0.05
People, groups of friends followed on social media	0.04	0.06	0.10	0.15	0.17
Other	0.02	0.03	0.03	0.04	0.08

Drivers of trust and expenditure

In terms of financial commitment, there is a positive correlation between trust in news and willingness to pay for professional content, but it is not strong. **Respondents with a more positive view of news are slightly more likely to pay for news through subscriptions or paywalls**. For example, 51% of those who said that news plays a positive role in society and 48% of those who said that it plays a modest positive role reported paying for news, against, respectively, 9% and 10% that accessed news content behind paywalls without paying (e.g., via a school or job account) and 29% and 31% who only accessed free news content. On the contrary, 36% of those who said that news spreads lies and 34% who believe that news is mostly harmful reported paying for news, against, respectively, 11% each that accessed news content behind paywalls freely and 35% and 33% that accessed only free news content.

In terms of drivers of expenditure,

a) **Price emerges as the most consistent and significant factor influencing expenditure across nearly all groups**. It consistently ranges between 40% and 58%, especially for those who value the alignment of the media with personal interests and the fact that news is produced by professional journalists.
b) **Trustworthiness stands out as a dominant factor across most groups**, varying from 27% to 49%. Regardless of what drives trust, reliability remains a critical consideration when consumers decide where to spend.
c) **Ease of access is also a substantial factor**, indicating the importance of convenience in today's news consumption landscape. This is especially notable among those who value editorial transparency and professionalism. Despite these commonalities, some specific variations arise.
d) **Exclusive content and having an original take are significantly important for those influenced by recommendations from friends or family**. This suggests that unique material or distinctive perspectives appeal more to individuals who rely on personal endorsements.
e) Similarly, **depth of coverage gains significance for people whose trust is linked to political orientation or familiarity with a known brand**, as these groups appear to value comprehensive reporting aligned with their viewpoints or trusted reputations.
f) Meanwhile, **support for local media and features such as extra editions, whether paper or online, hold less sway across all groups**, rarely exceeding 15% in importance.

In conclusion, price, trustworthiness, and ease of access emerge as the core drivers of expenditure. While some groups place additional emphasis on exclusive content, in-depth reporting, or brand familiarity, the main considerations remain relatively consistent. Consumers prioritising unique or comprehensive content, such as those driven by political orientation or recommendations, demonstrate a stronger preference for originality and depth in reporting. Conversely, those focusing on affordability and accessibility show a greater emphasis on straightforward factors like cost and reliability. **The findings reveal that affordability, reliability, and convenience are the primary influences on spending decisions in news consumption.**

Evolution of consumption vs evolution of expenditure

The correlation between changes in news consumption (X axis) and corresponding changes in expenditure (Y axis) illustrates the problem of monetization, as increased engagement does not reliably translate into increased revenue, highlighting the challenge of converting consumption habits into sustainable financial support for news providers.

a) **Among those who reported a significant increase in their news consumption, 54% reported an increase in their expenditure**. A further 22% indicated that their spending remained the same despite the rise in consumption, while only 5% noted a decrease in expenditure. 16% stated that they did not spend money on information and the remaining 3% could not provide an answer.

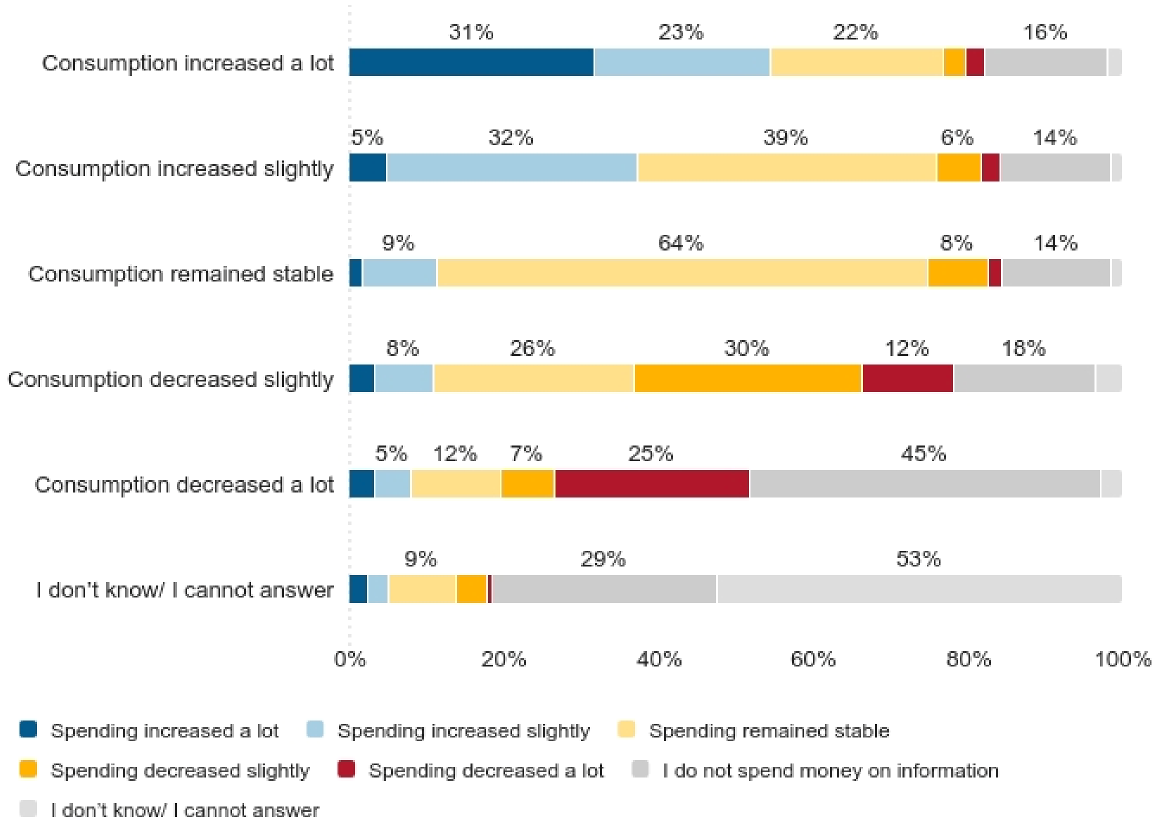
b) Among those whose consumption **increased slightly**, **just 37%** reported a corresponding increase in expenditure, while 39% kept their spending levels the same. A smaller portion, 8%, experienced a reduction in expenditure. The remainder 14% represented non-spenders and 2% did not know how to answer.

c) **For those whose news consumption remained stable, the majority (64%) indicated no change in their expenditure**, while only 11% reported an increase. Another 10% noted a decrease in spending. The rest of this group consists of those who do not pay for news (14%) and who could not answer (1%).

d) For respondents who experienced a **slight decrease** in consumption, the patterns shifted noticeably. Only 11% reported an increase in expenditure, while 26% maintained their previous spending levels. A significant 42% reduced their expenditure, with an additional 18% being non-paying consumers. 2% did not know how to answer.

e) **Those who reported a significant decrease in their consumption showed the most pronounced reduction in spending**. Just 8% indicated an increase in expenditure, 12% kept it the same, and 33% reduced their spending. A significant 45% reported not paying for news. 2% did not know how to answer.

Relation between change in news consumption and (question N18) and change in news expenditure (question N19)



Consumption and monetization

In general, both those whose news consumption increased or remained stable and those with declining consumption demonstrate a stronger inclination towards the consumption of free news content.

Specific news expenditure behaviours, such as buying printed newspapers or making one-off payments, are driven by factors like depth of coverage, exclusive content, and additional print editions, reflecting varied preferences for news delivery and content quality. The analysis highlights that **free content of news consistently dominates as the most popular choice across all consumer categories**, underscoring its universal appeal. However, there are notable variations in the uptake of paid services, such as digital and print subscriptions or one-off payments, which appear to be influenced by changes in consumption behaviour. As expected, **those with increased news consumption show a higher preference for paid options, whereas avoidance of expenditure becomes more prominent among individuals whose consumption has decreased or remained stable.** This trend reflects a growing reluctance to pay for news among less engaged groups, contrasting with the willingness to invest in paid services seen among more active consumers. More detailed results for the different categories are presented below in the table and the following description of the results.

Category of User	**Free Content**	**Digital Subscriptions**	**Print Newspapers**	**Print Subscriptions**	**Organisational Access**	**One-Off Payments**	**No Expenditure**
Significant **Increase** in Consumption	38%	27%	20%	14%	13%	13%	13%
Slight **Increase** in Consumption	40%	16%	23%	22%	15%	15%	11%
Stable Consumption	40%	8%	18%	14%	11%	8%	24%
Slight **Decrease** in Consumption	42%	10%	14%	11%	17%	9%	23%
Significant **Decrease** in Consumption	41%	6%	14%	6%	6%	7%	34%
Uncertain or Unable to Answer	30%	4%	7%	2%	0%	0%	57%

a) **Among those whose news consumption increased significantly**, 38% reported relying solely on free content, while other behaviours such as digital subscriptions (27%), buying printed newspapers (20%), and print subscriptions (14%) also saw notable uptake. A small percentage accessed news through organisations (13%), made one-off payments (13%) or chose none of these options (13%).

b) For respondents who reported a **slight increase in consumption**, the reliance on free content remained the dominant behaviour, at 40%. Other significant behaviours included print subscriptions (22%) and buying printed newspapers (23%), with digital subscriptions (16%) and organisational access (15%) playing a smaller role. One-off payments (15%) and the decision to avoid paid services altogether (11%) were less common in this group.

c) Among those whose **consumption remained stable**, the majority (40%) also primarily used free content. A significant portion (24%) chose none of the expenditure options, indicating a tendency to refrain from paid or subscription-based services. Digital subscriptions (8%), print subscriptions (14%), and buying printed newspapers (18%) were all less common, with organisational access (11%) and one-off payments (8%) representing minimal expenditure in this group.

d) **Respondents who slightly decreased their consumption demonstrated a similar pattern**, with 42% reporting exclusive reliance on free content and 23% avoiding paid options altogether. Digital subscriptions (10%), print subscriptions (11%), and buying printed newspapers (14%) were less frequent behaviours, while organisational access (17%) and one-off payments (9%) were also relatively low.

e) **For those who reported a significant decrease in consumption**, 41% continued to rely on free content, while 34% refrained from subscribing or paying for any news services. Digital subscriptions (6%), print subscriptions

(6%), and accessing news through organisations (6%) were rare, as were one-off payments (7%) and buying printed newspapers (14%).

f) **Respondents who were uncertain or unable to answer leaned heavily towards avoiding paid services or subscriptions**, with 57% reporting no paid or subscription-based behaviours. However, free content was still commonly used (30%), while digital subscriptions (4%), print subscriptions (2%), and buying printed newspapers (7%) were much less prevalent in this group.

Consumption, expenditure and drivers

Overall, there are consistent patterns in the relationships between consumption, expenditure behaviours, and their driving factors. **Price remains a dominant concern across most groups,** particularly among those who only used free content or avoided paid options entirely. **Trustworthiness is consistently highlighted as a significant factor**, especially among those who purchase printed newspapers or subscribe to print or digital services. **Ease of access plays a noticeable role** in many groups.

a) Those who exclusively **used free content** identified price as the most critical factor, at 55%, suggesting that affordability was their primary concern. Trustworthiness (29%) and ease of access (18%) were also noted, although these factors did not drive them towards paid options.
b) For respondents who accessed news behind paywalls **via their school, university or job account,** the most prominent drivers of expenditure included price (27%), trustworthiness (30%), and ease of access (29%). Lesser drivers for this group included depth of coverage (19%), originality (19%), support for local media (18%), and additional print editions (18%).
c) Among those who **bought printed newspapers**, trustworthiness emerged as the top driver (48%), closely followed by price (46%). This group demonstrated a clear preference for reliable and cost-effective content, with other factors like ease of access (25%) playing a lesser role.
d) For respondents who chose **print subscriptions**, additional print editions (25%), price (32%), and trustworthiness (33%) were highly influential factors. This group showed a preference for traditional news delivery, combined with an emphasis on reliability and cost-effectiveness.
e) For **digital subscribers**, depth of coverage (24%) and exclusive content (25%) played key roles in their expenditure choices. Ease of access and price (23%) also remained significant and trustworthiness (33%) was the most important factor also in this case, reflecting the desire for detailed and reliable digital news.
f) For individuals who opted for **one-off payments**, exclusive content (26%) and depth of coverage (24%) were the primary motivations. Price (34%) remained a significant consideration.
g) Those who selected "**none of the above**" as their expenditure option overwhelmingly cited price as their primary concern (59%), indicating a strong reluctance to pay for news content. However, trustworthiness (35%) and ease of access (22%) still held some relevance for this group, even if it did not lead to subscription or paid services.

Independence and monetization

The results show that while trustworthiness and independence are significant factors for many consumers in selecting news sources, these attributes do not necessarily translate into a higher likelihood of paying for news.

The proportion of individuals who value trustworthiness, independence and transparency in their news sources does not correlate strongly with an increased likelihood of paying for news. In other words, individuals who value trustworthiness, independence and transparency in news sources exhibit similar payment patterns across different types of news services compared to those who do not prioritize these attributes. For example, the percentage of respondents prioritizing independence is not markedly higher among those paying for subscriptions or encountering paywalls. For instance, 40% of individuals who prioritize news independence pay for news, against 44% of people who reported not valuing news independence.

News should be free?

The findings suggest a complex relationship between reasons for not paying for news and views on its value and role in society, with some variations across groups. **The belief that news should be free is relatively common**, with between 42% and 47% of respondents holding this view. This opinion is consistent across different perspectives on the value of journalism.

For example, **around half (47%) of both those who have a positive view of news and those who have a negative opinion, believing that news spread lies, think that news should be free**. Moreover, **39% of respondents with a positive view believe that free news is as good as paid options, compared to 32% of those who reported negative views**.

When looking at the relationship between the values that people attribute to news and the reasons they have not to pay for it, some key trends emerge.

Price remains a crucial factor for all groups, with at least 55% of respondents prioritising it. However, it is even more critical for those who focus on prioritising other expenses apart from news, with 64% indicating its importance.

Trustworthiness is most valued among those whose main source of news is free (49%). For other groups, the importance of trustworthiness is slightly lower (between 47% and 41%).

Ease of access is a relatively more significant value for those who do not want to make payments and manage accounts for accessing news and those who are content with free articles (with 30% of them highlighting its importance).

For other values, such as depth of coverage, exclusive content, support for local media, bundled offerings, the original take on events and the possibility of having an extra paper or online edition, there is no significant difference across groups.

Monetization and format preferences

The analysis reveals that the monetization of news appears closely linked to both the format and the type of content consumed. Overall, approximately 70% of respondents reported not spending on news, indicating a value of EUR 0 when asked to break down their monthly expenditures across different media categories. This trend underscores the significant reliance on free content, which continues to dominate news consumption patterns. However, a deeper look into preferences by format reveals notable differences in the propensity to pay for news. **While some formats, like printed press and newsletters, attract fewer users but a higher willingness to pay, others, like traditional television and social media, show broader reach but lower payment rates.**

- Among the 17% of respondents who prefer **traditional printed press**, 52% report paying for news, making this group the most likely to pay. While printed press accounts for a smaller share of preferences compared to other formats, it demonstrates the highest monetization potential per user. Similarly, **email newsletters**, chosen by 8% of respondents, attract a substantial proportion of paying users, with 45% indicating they pay for access. Despite the relatively small share of users, their high payment rate suggests strong potential for targeted monetization strategies.
- **Messaging apps, such as WhatsApp or Telegram**, preferred by 12% of respondents, see 37% of users willing to pay for news—again, a notable conversion rate for a niche format. **Online consumption of TV and radio content**, preferred by 16% and 9% respectively, shows similar payment rates, with 40% and 37% of users in these groups reporting expenditures. **YouTube or other video websites**, selected by 19% of respondents, sees 33% of its users paying for news, reflecting moderately strong payment behavior.
- **News websites or apps**, preferred by 31% of respondents, attract 31% of paying consumers, highlighting their broader appeal but slightly lower payment rate compared to niche formats. Similarly, 31% of **radio-on-air** listeners, also at 30% of preferences, report paying for news. **Social media platforms**, selected by a significant 33% of respondents, are less likely to generate revenue, with only 26% of users indicating they pay for news.
- At the lower end, **traditional television viewers**, who dominate preferences with 52% of respondents, exhibit only a 27% payment rate, underscoring the challenge of monetization in this widely used format. Lastly, among the 5% of respondents who do not express a strong preference for specific sources, only 9% report any kind of payment for news content, marking this group as the least monetizable.

The table below summarizes the relationship between respondents' preferred sources of news and their likelihood to pay for news content. It shows the percentage of individuals who do not pay for news and those who do, based on their preferences for various news formats. The data represents conditional probabilities, meaning the proportions of payers among those who selected a specific category, rather than the overall share of the population paying for news.

Table 2 Respondents' news source preferences, by payment for news

CATEGORY	DO NOT PAY FOR NEWS (%)	PAY FOR NEWS (%)
TV (ON AIR, CABLE) (52%)	0.73	0.27
TV ONLINE (ON-DEMAND, WEB, ETC.) (16%)	0.60	0.40
PRINTED PRESS (17%)	0.48	0.52
RADIO (ON AIR) (30%)	0.69	0.31
RADIO (ON DEMAND AND CATCH-UP PODCASTS) (9%)	0.63	0.37

NEWS WEBSITES AND/ OR APPS (31%)	0.69	0.31
SOCIAL MEDIA (E.G., FACEBOOK, INSTAGRAM, X, ETC.) (33%)	0.74	0.26
MESSAGING APPS (E.G., WHATSAPP, TELEGRAM) (12%)	0.63	0.37
EMAIL NEWSLETTERS (8%)	0.55	0.45
YOUTUBE OR OTHER VIDEO WEBSITES (E.G., VIMEO, TWITCH) (19%)	0.67	0.33
I DON'T KNOW / I AM INDIFFERENT (5%)	0.91	0.09
OTHER (PLEASE SPECIFY) (1%)	0.87	0.13

Note: Respondents were allowed to select up to three preferred sources of news for the question QN4 "What are your preferred sources of news?". The payment data reflects spending reported in Q15, which asked respondents to indicate their monthly expenditure in Euros (€) on news.

Media 'avid' consumers

In terms of overall media consumption, people who pay for news report higher consumption across all types of media. For films, 35% of those who pay for news watch them frequently (i.e., daily or weekly), compared to 30% of those who do not. In the case of reality shows, 22% of news subscribers watch them frequently, against 10% who do not. For sports, 29% of those who pay for news are frequent viewers, compared to 19% of non-payers. Video games are played daily or weekly by 22% of those who pay for news, while only 15% of non-payers engage with them with this frequency. Frequent social media usage is higher among those who pay for news at 34%, compared to 27% of those who do not, and daily or weekly music consumption is also greater, with 35% of news subscribers listening to music, against 27% of non-payers.

Demographic and Consumption Profiles

The following insights show some interesting demographics and behaviours of individuals who either avoid news or engage with it differently. Key findings include who avoids news, typical local news consumers, and differences in media and topic preferences and between professional and user-generated content.

News avoiders

More women (9%) than men (7%) are news avoiders and the age distribution shows that news avoiders are more common among young age groups. In particular, 9% of those aged 18–30, 9% of those 31–40, and 11% of those 41–50 are news avoiders, against 6% of the 51–60 age group and 5% of those over 60. Regarding education, lower-educated individuals (11%) tend to avoid news more than medium (8%) and higher-educated ones (5%). 11% of those living in rural areas avoid news, against 7% of those living in cities or towns, and there is not a significant difference among those living alone or with children. In terms of income levels, only 6% of those who describe their financial situation as comfortable tend to avoid news, against 11% of people living in an uncomfortable financial situation.

When it comes to perceptions and preferences, surprisingly, 46% of those who try to avoid news hold a positive view of the news. Their methods of news consumption show varying levels of engagement, with 9% reading print newspapers, 7% accessing digital newspapers, 14% watching TV news, and 21% engaging with recorded news. Social media accounts for 10%, user-shared news for 10%, and podcasts for 7%. Content preferences reflect an interest in lifestyle and entertainment, with 24% and 23% choosing these categories respectively. Other notable preferences include society (19%), opinion pieces (19%), economy (17%), and international news (15%). Local news attracts 9%, culture 14%, specialised content 15%, and investigative reporting 8%. Interest in sport stands at 8%, while national news and general news content are less popular at 4% and 4% respectively. Trust in media sources shows private TV leading with 18%, followed by public TV at 11%. Private radio garners 9%, and public radio 5%. Other sources include influencers (10%), social media users (9%), printed press (7%), digital news platforms (4%), and mobile social apps (4%). Finally, the willingness to pay for news of those who avoid news is relatively low, with only 13% indicating a readiness to do so.

Local news consumers

55% of women follow local news, against 45% of men. Likelihood to follow local news increase with age: 29% of those aged 18-30; 40% 31-40; 46% 41-50; 54% 51-60; 57% of those aged more than 60. Local news followers tend to be **with medium education** (49%, against 43% of the higher educated and 46% of the lower educated). When looking at different income levels, 44% of people living in a comfortable financial situation, 48% of those able to meet their basic needs and 46% of those with an uncomfortable financial situation follow local news.

Social media consumer

People who generally prefer to consume news on social media tend to be young, with 31% of those aged 18-30 favouring this source, against 22% of those aged 31-40, 19% of 41-50, 15% of 51-60, and 11% of the over 60. They are more likely to be female, with 21% of women preferring social media sources compared to 16% of men. A lower level of education is common, with 24% of the low-educated preferring social media sources, against 18% of the medium-educated and 16% of the high-educated. There is no significant difference among those living in cities, towns or rural areas and among those living alone, with other adult(s) or child(ren). In terms of wellbeing, there is no significant difference across groups.

Those who have a negative view of news

There is no significant difference between men and women’s views of news. In contrast, young people tend to have a more negative view of news, with 25% of those aged 18-30 and 29% of those aged 31-40 thinking either that news spreads lies or that is harmful, against 20% of those aged over 60. In terms of education, there is only a slight difference among different levels: 26% of the low-educated and 25% of the medium-educated have a negative view of news, against 23% of the high-educated. Respondents’ financial situation plays a significant role in their view of news. Indeed, 32% of those reporting to live in an uncomfortable financial situation have a negative view of news, compared to only 21% of those living more comfortably. Finally, there is no significant difference among those living in cities, towns or rural areas and those living alone, with adult(s) or child(ren).

Consumption patterns and frequency

With regard to other media consumption patterns, **films, reality, video games, social media and music are equally consumed among groups with different time spent on news**, so they are independent from news consumption. In contrast, **watching sports**

is correlated with news consumption: 27% and 23% of people consuming news more than 30 minutes and between 11-30 minutes per day watch sports daily or weekly, against 17% and 12% of those who watch news 0-10 minutes per day or not even daily, respectively.

For what concerns topic preferences, **overall, people with higher consumption of news (i.e., those who spend at least 11 minutes daily on news) watch more of all topics.** However, **investigative reporting is relatively more watched by people who don't follow the news daily** (14%) than people who watch the news daily (1%).

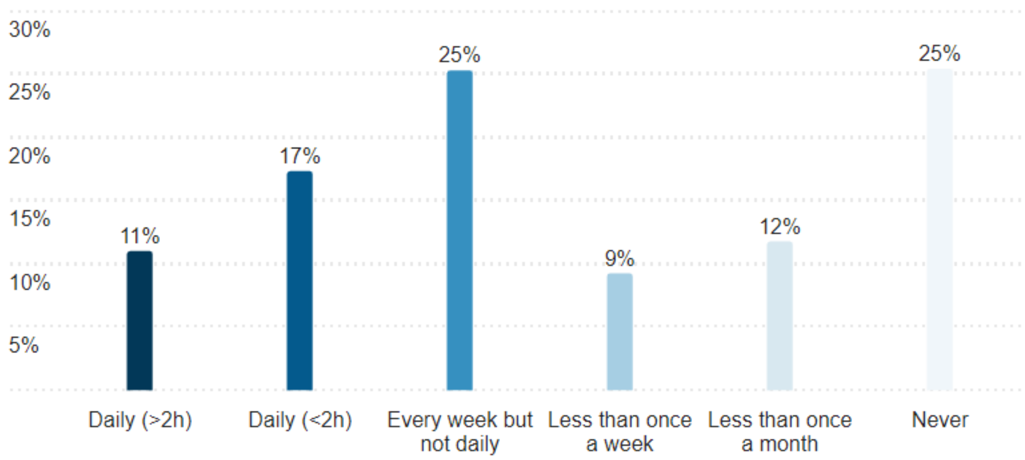
2.4. Video games consumption trends

2.4.1. Overall consumption trends

Video game consumption preferences

The frequency of video game play among respondents varies widely. Participants were asked to indicate how often they played video games in the last year (Q11), including casual games on mobile devices (e.g., crosswords, card games, etc). Overall, 25% of respondents reported that they had not played any video games during the last year, even when considering casual games on mobiles. These respondents were therefore assigned to different survey blocks to ensure that the questions remained relevant to their media consumption habits.

Question VG1. How often do you play video games? (n=55,746)[61]

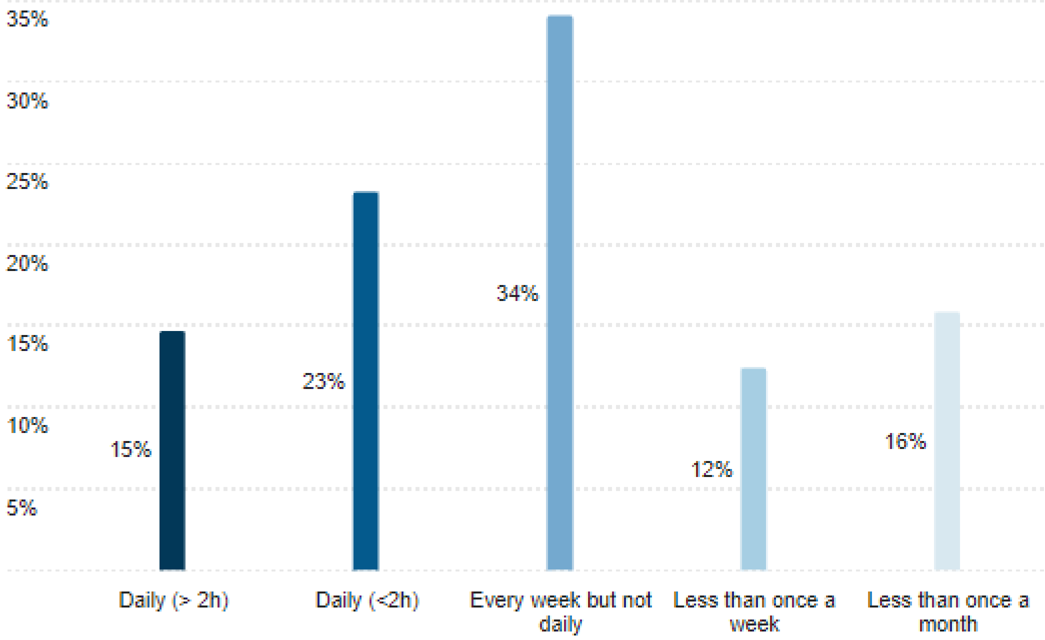


Among the 75% of respondents who reported playing at least once in the last year (n=44,119), approximately 28% are occasional gamers, playing once a month or less. The most common frequency is weekly gaming (but not daily), with 34% of players falling into this category. Daily gaming for up to two hours is reported by 23%, while 15% engage in daily gaming for more than two hours.

The data indicates a decline in gaming frequency with increasing age. Younger respondents aged 18-30 are more likely to play regularly, with substantial proportions engaging in both daily and weekly gaming sessions. However, as we move to age groups older than 30, this proportion decreased markedly, indicating that gaming becomes less common in older demographics. Among the youngest group, aged 18 to 30, there is a fairly balanced distribution of frequency, with 33% playing every week but not daily and 38% engaging daily. A smaller proportion, 14%, report playing less than once a week and another 14% less than once a month. In contrast, among respondents aged over 60, the relative majority (35%) indicates playing less than once a week or less than once a month. However, similar to younger age groups, 34% reports playing every week but not daily. Then, 32% of players aged over 60 play daily.

[61] The whole sample of respondents was considered.

Question VG1. Frequency of playing video games for those who play (n=44,119)



The survey results show that **mobile games or apps on smartphones or tablets are the most commonly played**, with 62% of players regularly engaging with these formats. Online games that are played live on a PC or laptop via an internet connection and console games, such as those on Xbox or PlayStation, are also popular, each played regularly by 27%. Portable console games, like those on the Nintendo Switch or Steam Deck, are played regularly by 14% of participants, while only 7% engage in VR games with a headset, and 13% play other types of PC games.

Socioeconomic background plays a nuanced role in shaping the devices people use for gaming, with variations driven by factors such as gender, age, and education, rather than income or family situation.

There is a notable difference in device preferences between males and females. **Men tend to use console games (22%), online games (20%) and other PC games (11%) more frequently than women (respectively, 15%, 16% and 7%)**. Females dominate smartphone gaming (47%, against 35% of men), portable console games (10%, against 8%) and VR games played with an headset (5%, against 4%).

Age is a major factor in determining which devices are most popular. **Younger gamers, particularly those in the 18-30 age group, represent the majority of users across all gaming devices, apart from mobile games and other PC games.** Console and portable consoles games are significantly more popular with this age group, played, respectively, by 21% and 12% of those aged 18-30, against 9% and 5% of those aged over 60. In contrast, 51% and 16% of players over 60 prefer, respectively, mobile games and other PC games, against 35% and 6% of those aged 18-30.

Education levels do not significantly influence device preferences, apart from **VR games played with an headset: 7% of players with a high education regularly use them, against 3% of those with a lower education,** suggesting that this more advanced and immersive form of gaming appeals to a more educated demographic.

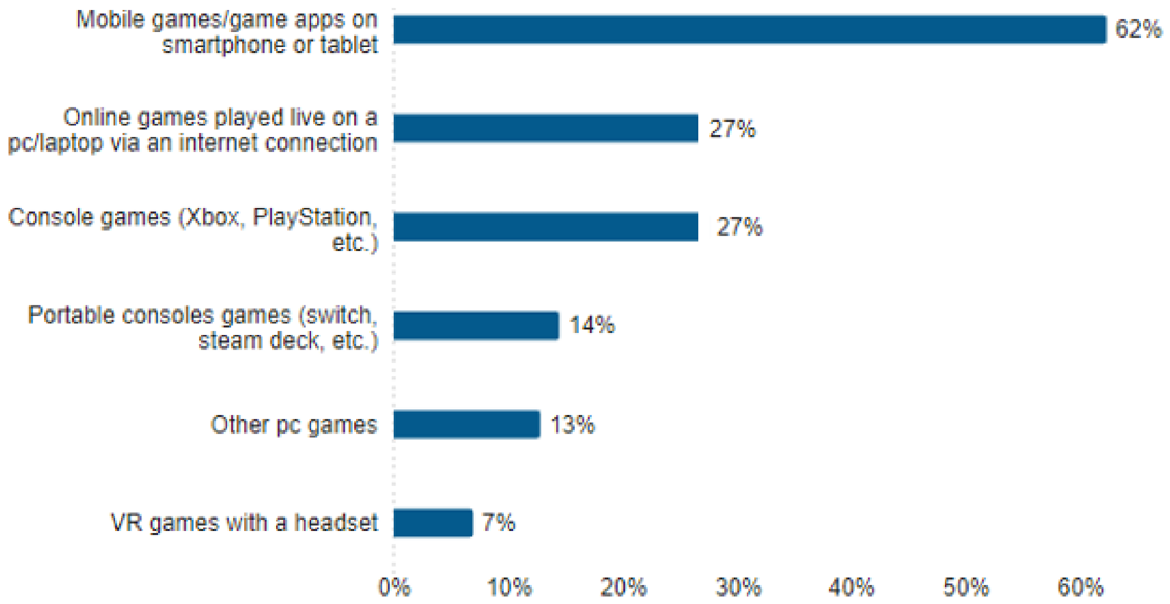
Mobile games are more popular across respondents with a more unstable financial situation, with 46% of them preferring this device against 35% of those living in a comfortable financial situation. Portable console games show a distinct pattern, being more popular among individuals with a comfortable financial situation (12%) compared to those with an uncomfortable financial situation (8%). VR gaming has a larger disparity, with 8% of those living comfortably choosing it, compared to 3% of those living uncomfortably, indicating that VR gaming is more accessible to those with higher financial means.

Interestingly, **there is no clear correlation between employment status and the choice of gaming devices**.

When it comes to family composition, the data shows that **individuals who live with children prefer to use consoles and portable console games.** In contrast, **those who primarily use online games played live are more likely not to live with children** (18%-20%, against 17%-14%). This might indicate that PC gaming, which often requires dedicated time and equipment, is more popular among those with fewer family obligations.

Device preferences show little difference based on whether individuals live in urban, town, or rural environments. In all settings, smartphones are the most popular gaming device, followed by consoles, online games, and VR. This reflects the widespread accessibility of smartphones across different living environments, while more specialised devices, like VR, have similar levels of appeal regardless of geographic location.

Question VG2. Which ones do you regularly play? Please select all that apply. (n=44,119, 1.42 average clicks)

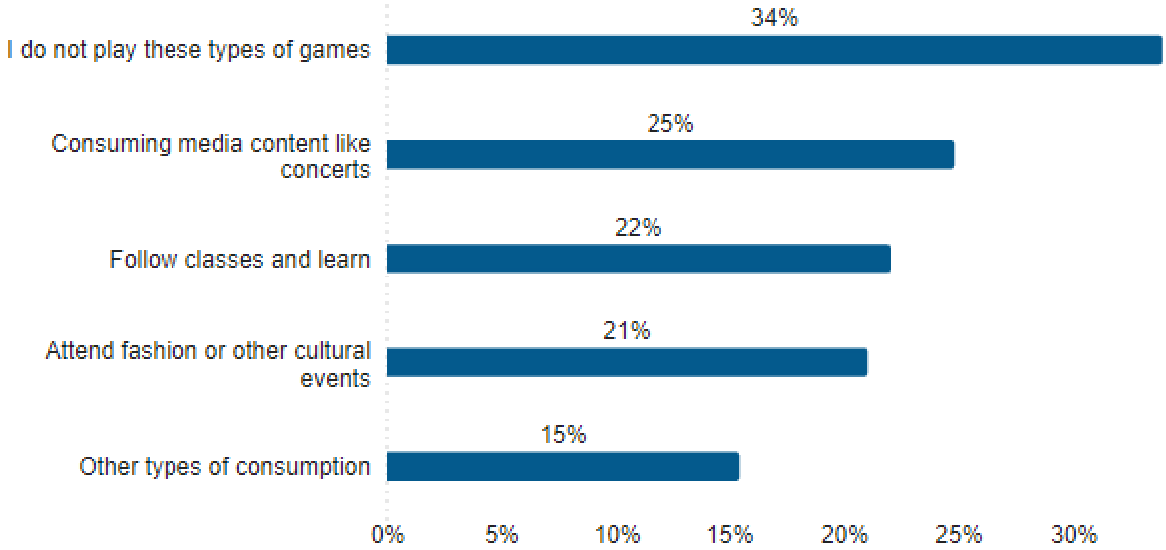


Among those who play online games, 66% engage with games like Fortnite, Roblox, or Minecraft which have set up their own universe allowing for a variety of activities beyond gaming. 25% of players in these games consume media content such as concerts within these games. 22% use these platforms to follow classes and learn, while 21% attend fashion or other cultural events within the game environments. Additionally, 15% engage in other types of consumption activities that were not specified in the survey options.

Across age groups, younger respondents (18-30) are most active in consuming media content like concerts (23%), attending cultural or fashion events (20%) and other typees of consumption (17%), with respect to oder age groups, particularly those over 60 (respectively, 14%, 12% and 7%). Respondents aged 51-60 and over 60 show lower engagement across all activities, with a significant proportion indicating they do not play these types of games at all (40% and 55%, respectively).

The same trend appears when looking at education levels, where high and medium-educated people show the greatest interest in these activities, in comparison with people with low education.

Question VG3. Do you do any of the following activities within online games (e.g., Fortnite, Roblox, Minecraft)? Please select all that apply. (n=13,229, 1 average click)[62]

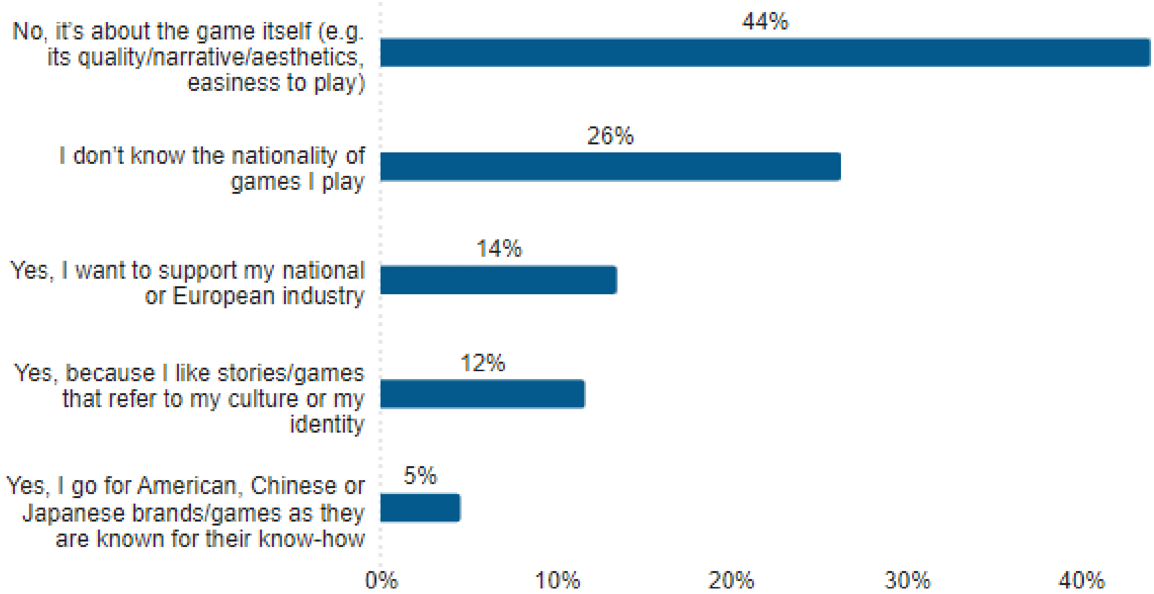


When considering whether to play a game, **70% of respondents do not consider the nationality of a game a factor**, as they focus on aspects such as quality, narrative, and aesthetics, or they do not know the nationality of the games they play. However, **31% of participants consider it an important factor**, as they prefer to support their national or European gaming industry (14%), are attracted to games that reflect their own culture (12%) or deliberately favour games from American, Chinese, or Japanese origins (5%).

Younger players are more likely to be drawn to gaming aspects, such as quality, narrative, aesthetics and easiness of play, while older groups display a mix of ambivalence towards nationality or a preference for culturally relevant games. Younger respondents (18-30) also show the highest interest in games from American, Chinese, or Japanese brands, with 7% recognising these brands for their expertise. A considerable proportion of those over 60 (38%) are unaware of the nationality of the games they play, while 13% prioritise supporting national or European industries.

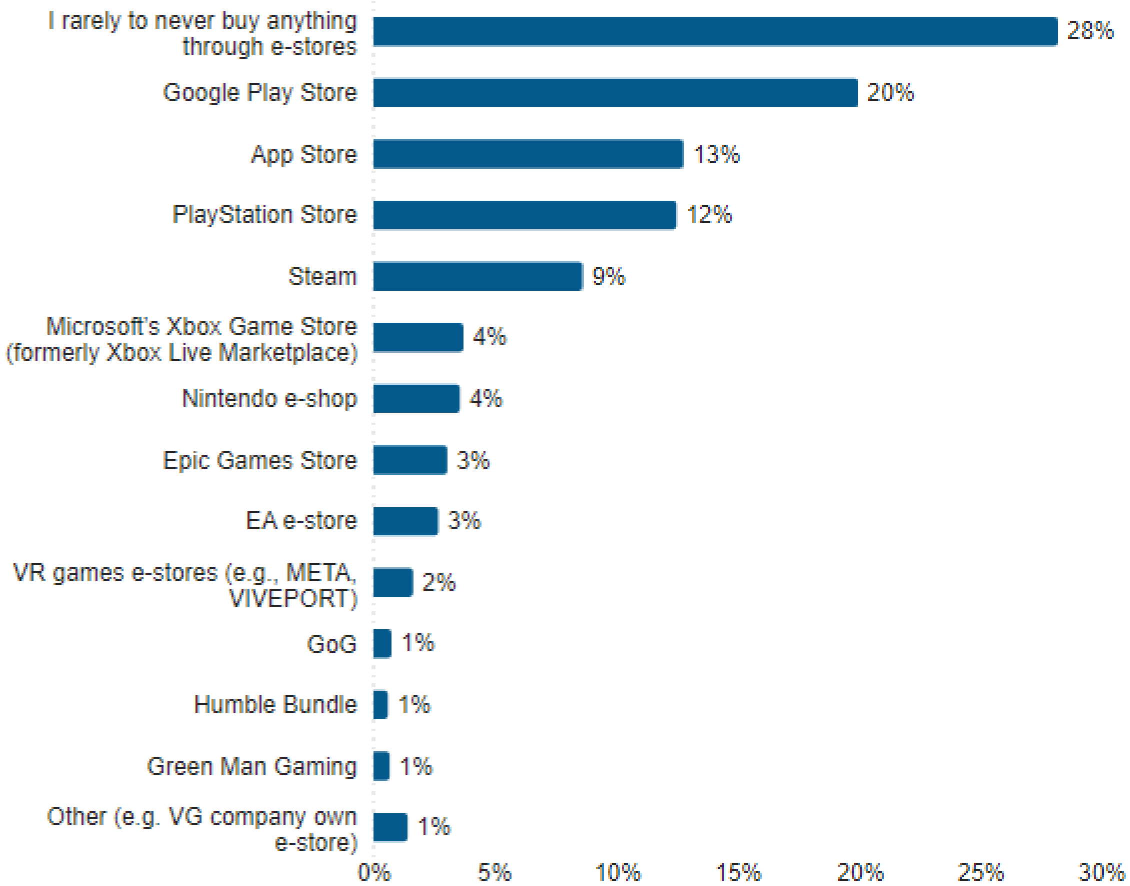
[62] Question asked only if answer "Online games played live on a pc/laptop via an internet connection" was selected in question VG2.

Question VG4. Is the nationality of a game a factor when you consider playing it? (n=44,119)



The survey reveals that the **Google Play Store is the most frequently used platform for purchasing games,** with 20% of players choosing it. The App Store follows, being preferred by 13%. PlayStation Store is the choice of 12%, while Steam, a popular PC gaming platform, is used by 9%. Fewer players use Microsoft's Xbox Game Store (4%), the Nintendo e-shop (4%), the Epic Games Store (3%) and the EA e-store (3%). Additionally, **28% of players indicated that they rarely or never buy anything through e-stores**.

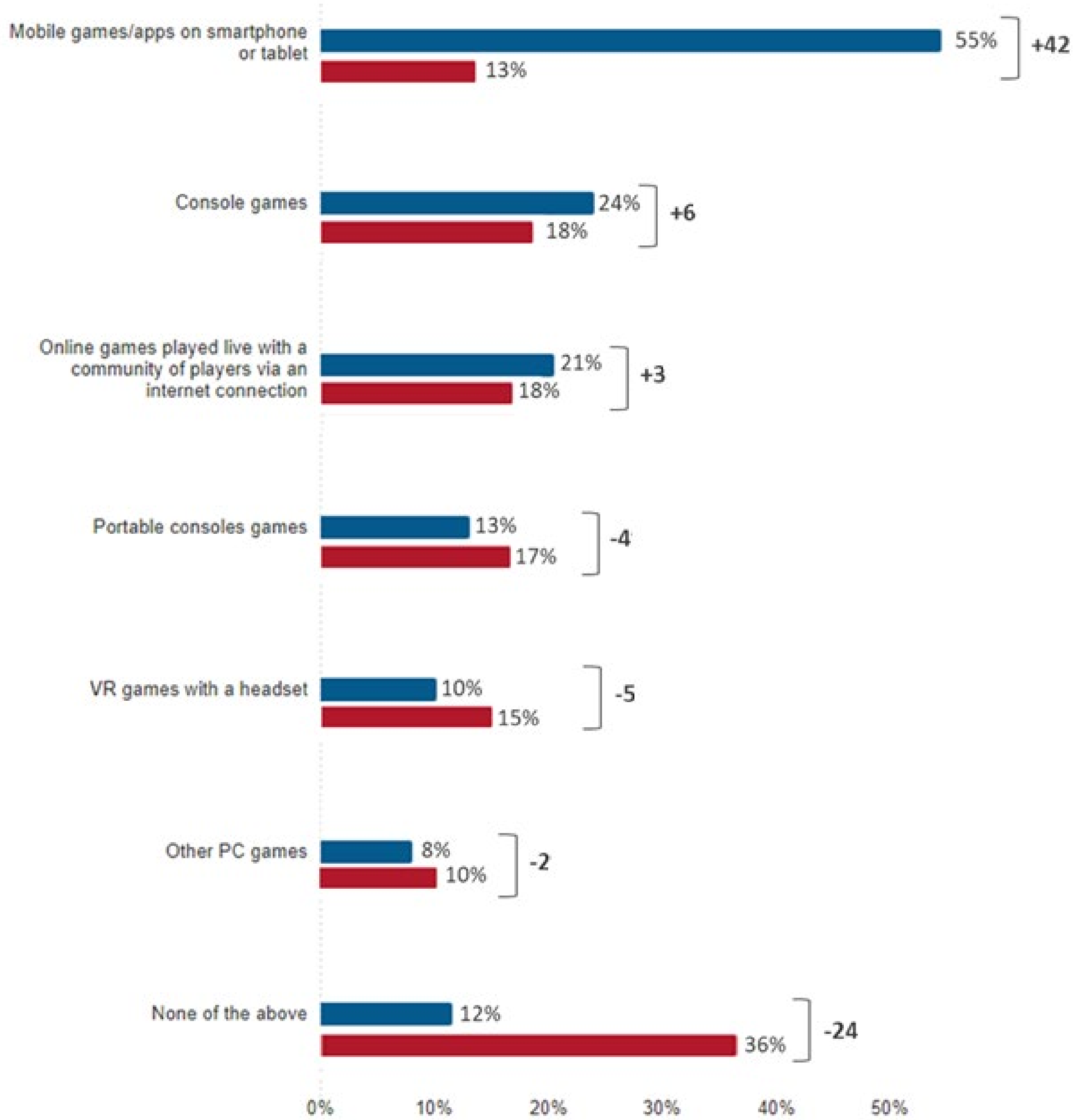
Question VG5. When purchasing a game via an e-store, which one do you most normally use? (n=44,119)



Substitution effects in the last 12 months

Overall, **respondents played altogether more this year than last year**. The survey results indicate that **mobile games or apps on smartphones or tablets have seen the most significant increase in player engagement over the past 12 months**, with 55% of respondents reporting increased play and only 13% reducing it, with a net increase of 42 percentage points. **Console games, such as those on Xbox or PlayStation, also saw an uptick**, with 24% of participants engaging more frequently. However, 18% reported playing less in the last year, resulting in a net increase of 6 percentage points. **Online games played live with a community via an internet connection** saw a 21% increase and an 18% decrease, scoring a **net increase** of 3 percentage points. Portable consoles like the Switch or Steam Deck attracted 13% more players, but 17% reported a decrease in playing, for a net decrease of 4 percentage points. Only 10% of respondents started playing more VR games with a headset and 15% reported playing them less, resulting in the highest net decrease of 5 percentage points. Other PC games scored a 2 percentage points net decrease. Ultimately, 12% indicated no increase and 36% no decrease in their gaming habits for the proposed categories.

Question VG6 and VG7. What kind of formats of games have you started playing more and less in the last 12 months? Please select all that apply. (n=44,119, 1.27 average clicks)



The table below presents the **substitution effects in gaming consumption, detailing how increased use of one gaming format impacts the consumption of other formats.** The left column lists each gaming format where consumption has increased, while the right columns show the percentage decrease in other gaming formats due to this increased use. Each cell represents the percentage of respondents who reported a reduction in consumption of a particular format as a result of spending more time on the format indicated in the row.

- **Mobile Games or Apps:** 55% of respondents reported an increase in consumption of mobile games or apps. Among these users, mobile gaming has a broad substitution effect, with 22% reducing time spent on portable console games, 21% reducing VR games with a headset, 29% reducing online games played live, and

25% reducing other PC games. This pattern suggests that mobile gaming significantly draws users away from other formats.

- **Console Games:** 24% of respondents indicated an increase in console gaming. Among these users, 26% reduced VR gaming, 29% reduced live online gaming, and 25% reduced other PC gaming. This indicates that console gaming frequently substitutes for VR and online gaming experiences.
- **Portable Console Games:** 21% of respondents reported increased use of portable console games. Among these users, 28% decreased their time on online games played live and 24% on other PC games, suggesting that portable consoles are often substituted for live online and PC gaming.
- **VR Games with a Headset:** 13% of respondents indicated an increase in VR gaming. Of these users, 22% reduced time on portable console games, 22% on online games played live, and 15% on other PC games, indicating moderate substitution from VR to other gaming formats.
- **Online Games Played Live:** 10% of respondents reported an increase in live online gaming. Among these, 29% reduced VR gaming, 24% reduced portable console gaming, and 13% reduced other PC games. This shows that live online gaming competes strongly with VR and other gaming options.
- **Other PC Games:** 8% of respondents reported increased engagement with other PC games. Among these users, 11% reduced mobile games or apps, 11% reduced console games, and 11% reduced portable console games. This suggests that increases in PC game consumption have a relatively limited substitution effect on other gaming formats.

Substitution Effects in Gaming Consumption: increased use of one gaming format and decreased use of other formats. (n=44,119)

		And as a consequence, % decrease in consumption of:					
% increase consumption of:		Mobile games or apps	Console games	Portable console games	VR games with a headset	Online games played live	Other PC games
Mobile games or apps	55%	0%	22%	21%	29%	25%	15%
Console games	24%	22%	0%	26%	29%	25%	20%
Portable console games	21%	19%	22%	0%	28%	24%	14%
VR games with a headset	13%	18%	22%	25%	0%	22%	15%
Online games played live	10%	21%	24%	25%	29%	0%	13%
Other PC games	8%	11%	11%	11%	9%	15%	0%

The role of video games in society

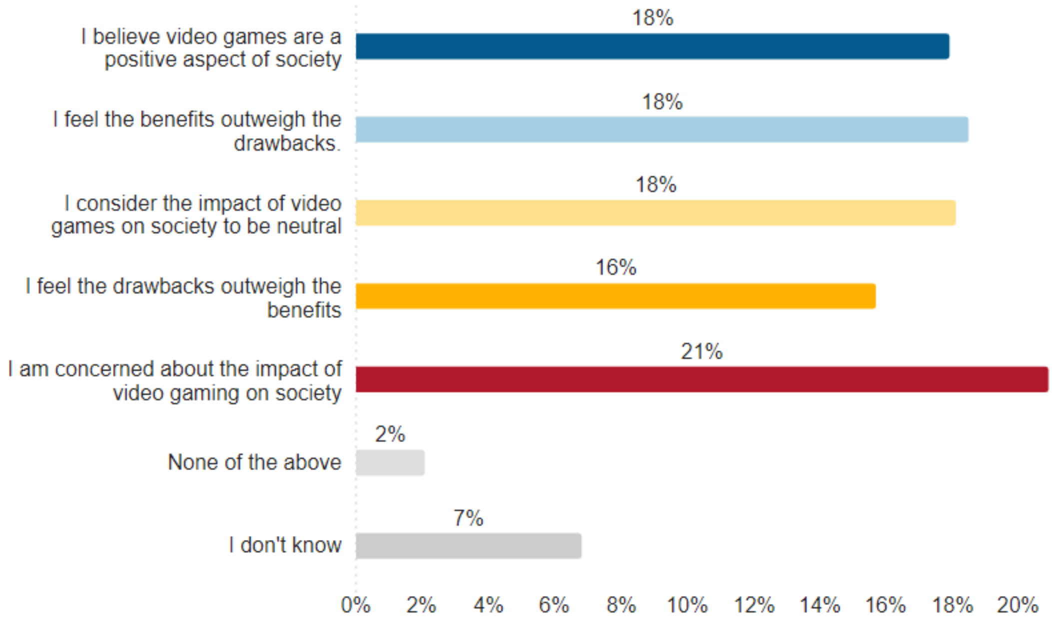
Among those people who play video games (n=44,119), which represent about 75% of the sample, the views on the role of video games in society reveal split opinions.

A significant proportion (37%) expressed concern about the potential negative impacts of video gaming on society. However, a similar percentage, 36%, viewed video games positively, recognising their benefits, such as learning opportunities. Meanwhile, 18% remained neutral, seeing the impact of video games as neither significantly positive nor negative. Additionally, 9% of respondents were unsure or their view did not align with any of the provided perspectives.

When looking at age group differences, **younger people have a more positive view with respect to the older population**. Respondents aged 18-30 have a relatively balanced view, with a larger proportion believing video games are positive or that their benefits outweigh the drawbacks. In contrast, as age increases, there is a noticeable shift towards concern about the negative impact of video games. This concern is most prominent in respondents aged 51-60 and over 60. While the percentage of those who consider video games to have a neutral impact remains steady across most groups, there is a gradual rise in uncertainty or lack of opinion among older respondents.

Higher education levels are associated with a more favourable or nuanced view of video games. Those with lower levels of education express a relatively higher concern about the negative impact of video games, with 24% indicating worry and 16% believing that drawbacks outweigh benefits. As education levels increase, there is a slight shift towards more balanced perspectives. The group with higher education levels shows the most positive perception, with 19% viewing video games favourably and 21% recognising benefits outweighing drawbacks. Those uncertain or indifferent range from 5% (higher-educated) to 9% (lower-educated).

Question VG8. How do you view the role of video games in society? (n=44,119)

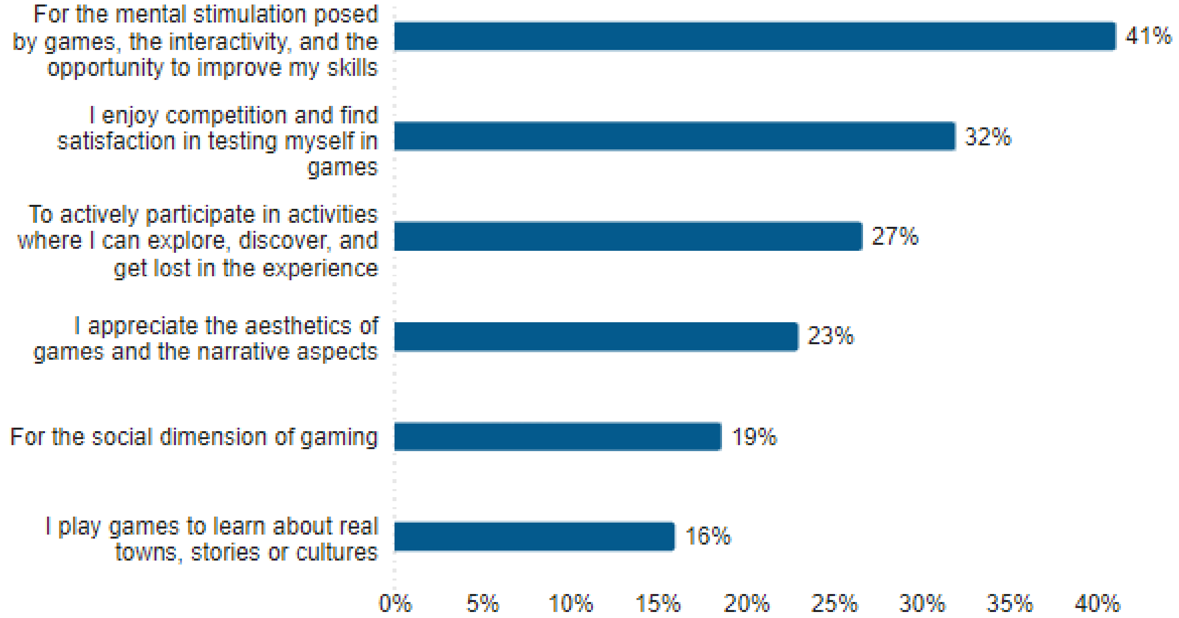


Reasons for playing video games

Participants in the survey highlighted several reasons for their enjoyment of video games. The most frequently cited reason, selected by 41% of respondents, is the mental stimulation that games provide. Competition is also a significant motivator, with 32% enjoying the competitive aspects of gaming. 27% of players enjoy active participation in gaming activities. Aesthetic appreciation of games is important to 23%, while the social dimension of gaming, including playing with or against others, is appreciated by 19% of respondents. Lastly, 16% of participants play games to learn about real towns, stories, or historical events.

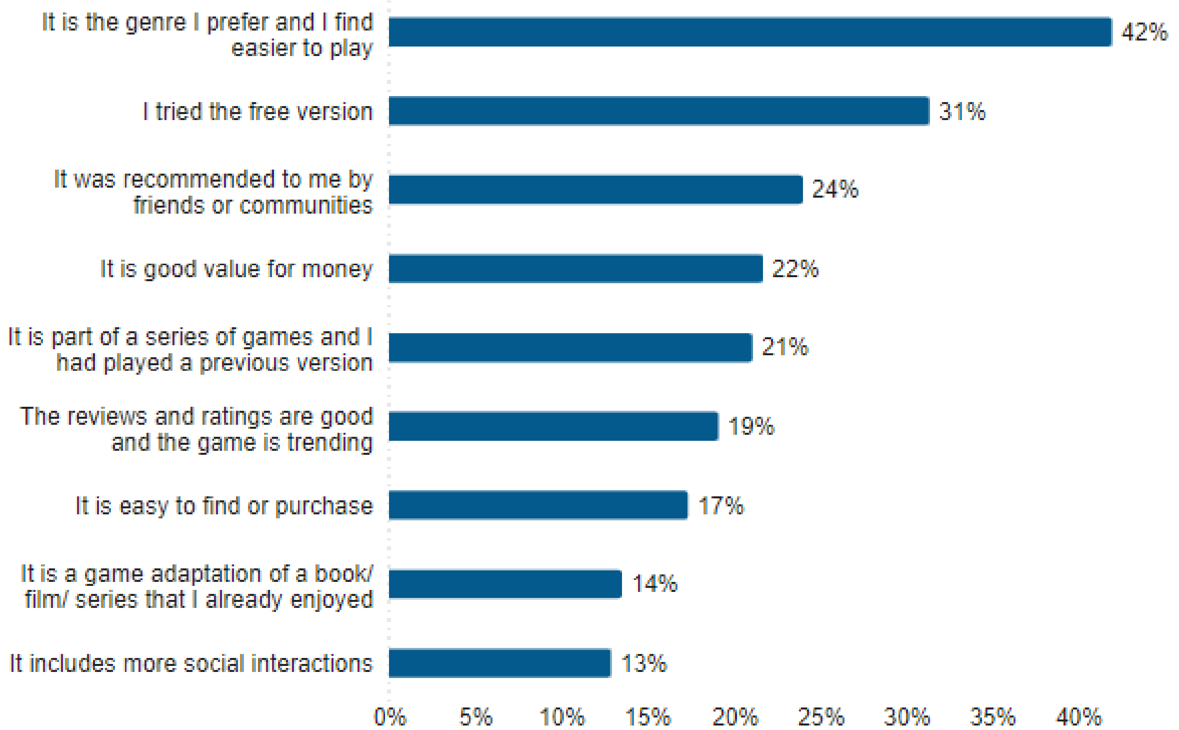
Different education levels, gender and financial situation have not a significant impact on reasons to play video games. In contrast, the willingness to enjoy mental stimulation increases with age (34% of players over 60, against 21% of those aged 18-30), while to get lost in the experience, aesthetics and the social dimension of games are more important for younger players (respectively, 19%, 16% and 15% against 13%, 12% and 7% of those aged over 60).

Question VG9. Why do you enjoy playing video games? Please select all that apply. (n=44,119, 1.48 average clicks)



The survey results highlight several key factors that influence respondents' decisions when choosing one game over another. **The most significant factor, selected by 42% of participants, is the genre of the game**, which aligns with their preferences and interests. 31% of participants prefer to play games that they tried first as a free version and recommendations from others influence 24% of respondents.

Question VG10. What makes you decide to play one game instead of another? Please select a maximum of 3 options. (n=44,119, 1.91 average clicks)



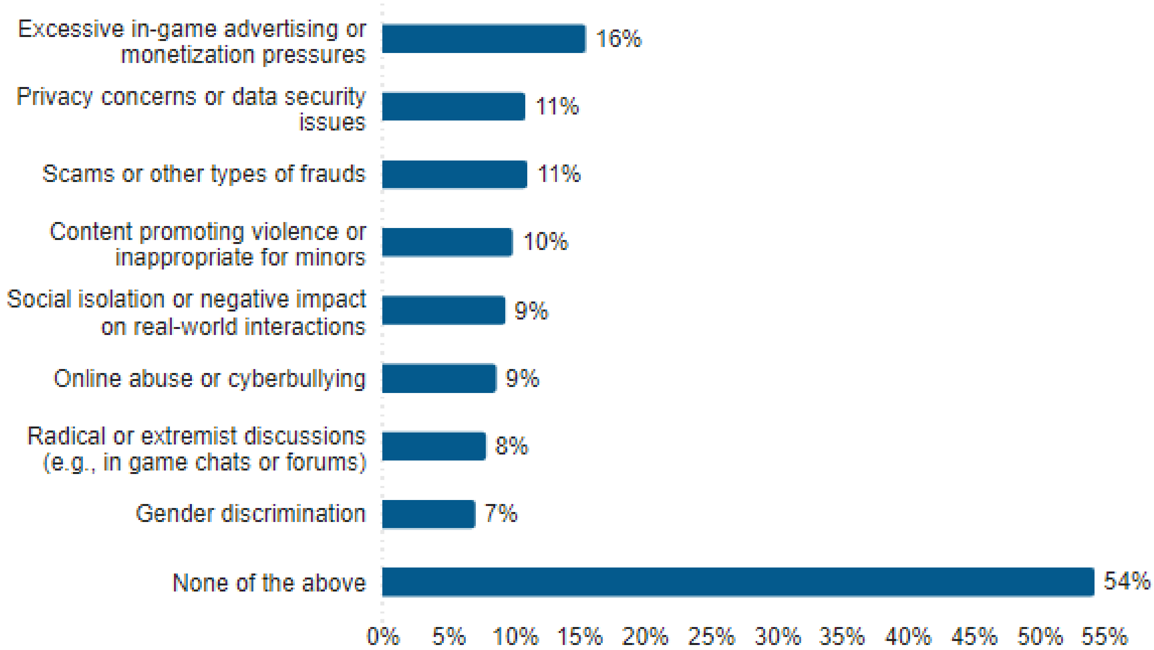
Video game consumption issues

54% of players indicated that no one in their household had encountered any of the listed issues while playing video games in the last two years. This means that **46% of the sample reported experiencing one or more issues while playing video games in the last two years**. Specifically, 16% reported excessive in-game advertising or monetization pressures. Privacy concerns, data security issues, scams, and other types of fraud were each cited by 11% of participants. Content promoting violence was noted by 10%. Social isolation or negative impact on real-world interactions and online abuse or cyberbullying were each reported by 9% of players. Radical or extremist discussions and gender discrimination were a concern for 8% and 7%, respectively.

The data reveals that gaming-related issues are prevalent across various gaming categories, with no single platform being entirely immune to these concerns. While specific issues are more common among specific categories, such as social isolation which is slightly more pronounced for those playing VR games (14%), most problems, including privacy concerns, online abuse, and gender discrimination, show relatively consistent rates across platforms. A substantial portion of users across all categories—ranging from 39% (among those playing PC games) to 67% (among those playing VR games)—report no issues. Overall, this consistency indicates that gaming-related challenges are not confined to specific formats but rather reflect broader, industry-wide trends.

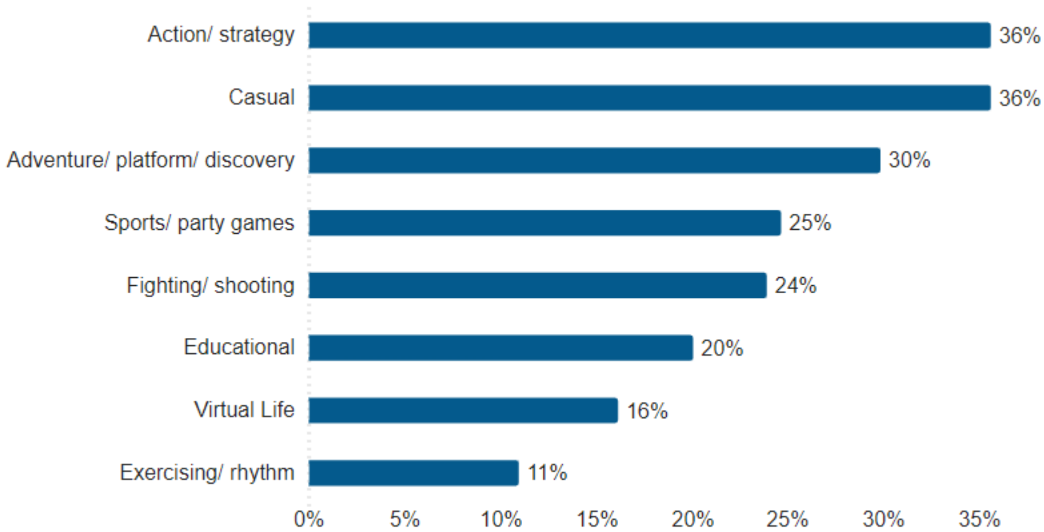
Among mobile gamers—those who regularly play games on smartphones or tablets, which are the formats more regularly played—certain issues are notably prevalent. Excessive in-game advertising or monetization pressures are the most frequently reported concern, with 17% of mobile gamers indicating this issue in their household over the past two years. Other significant concerns include scams or other types of fraud (10%), social isolation or negative impacts on real-world interactions (9%), privacy concerns or data security issues (9%), and exposure to radical or extremist discussions (7%). Additionally, 7% of mobile gamers reported encountering online abuse or cyberbullying, and 6% noted gender discrimination or reinforcement of harmful stereotypes.

Question VG11. In the last two years, while playing video games, has anyone in your household encountered any of the following issues? Please select all that apply. (n=44,119, 1.27 average clicks)



The most popular genres among players' households include action/strategy games and casual games such as puzzles, cards, or word games, reported by 36%. Adventure/platform/discovery games are favoured by 30%, while sports/party games engage 25% of households. Fighting/shooting games have been selected by 24%. Educational games are played by 20% of respondents' households, while virtual life games are played by 16% and exercising/rhythm games by 11%.

Question VG12. What are the most played genres in your household? Please select all that apply. (n=44,119, 1.85 average clicks)



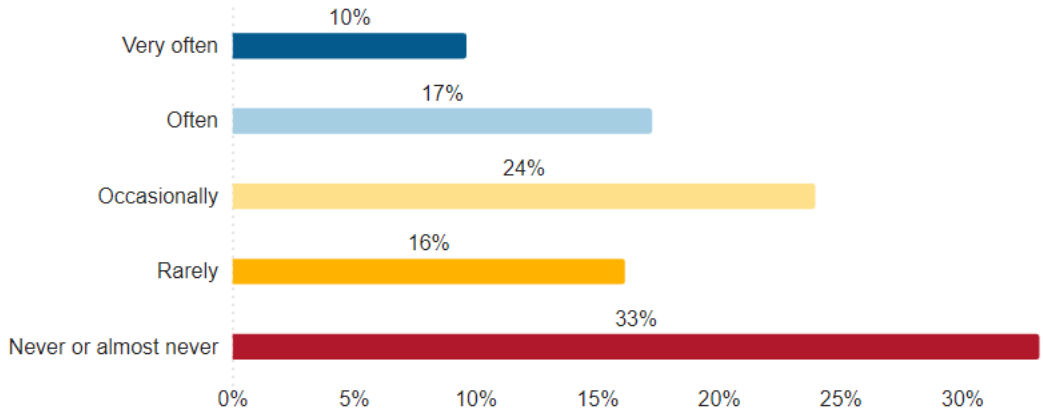
Multi-player online video games

For what concerns the frequency of playing multi-player online games, there is a clear trend: **as age increases, the frequency of playing multi-player online games decreases**, with the proportion of non-players rising significantly in older age groups.

In the 18-30 age group, a relatively high share of respondents (38%) play often or very often, while 29% play occasionally and 32% play rarely or never. This indicates a more balanced distribution of engagement within this younger group. However, in the 31-40 age group, the proportion of frequent players drops to 31%. In the 41-50 age group, there is a further decline, with only 27% playing often or very often. The trend continues in the 51-60 age group, where only 18% are frequent players, and a substantial 61% rarely or never engage in multi-player online games.

For respondents over 60, the decline in participation is most pronounced. Only 12% play often or very often, and 16% occasionally, while 72% rarely or never play, reflecting the lowest level of engagement across all age groups.

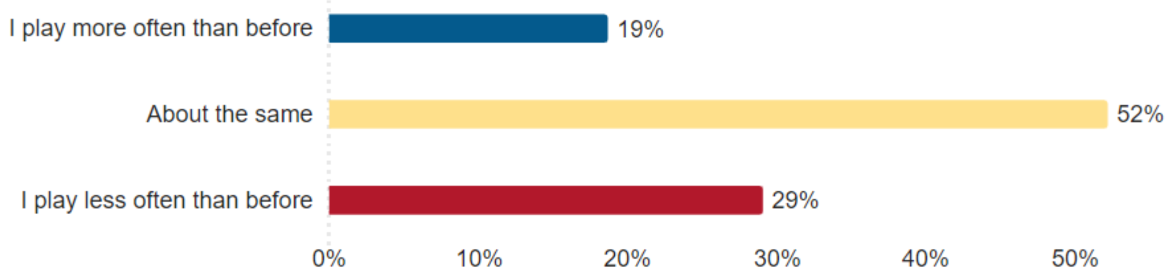
Question VG13. How often do you play multi-player online games which involve large communities of players (e.g., Minecraft, Eve Online, Fortnite, etc.)? (n=44,119)



Over the past 2-3 years, the frequency of playing multiplayer-only games has remained about the same for 52% of respondents. However, 19% of participants reported playing these games more often, while 29% have reduced their engagement with multiplayer-only games.

The data suggests a clear age-related pattern in the frequency of multiplayer gaming. Younger respondents, particularly those under 30, are more likely to increase their gaming or maintain the same levels as before. Conversely, as age progresses, a growing proportion of respondents report a decline in their gaming frequency. In detail, among those aged 18 to 30, 27% reported playing more often, 46% maintained the same frequency, while 28% reported playing less often. The 31 to 40 age group showed a similar pattern, with 23% increasing their gaming frequency and 51% remaining unchanged, but 26% playing less often, which is slightly lower than the youngest group. As age increases, playing decreases. In the 41 to 50 age group, only 17% reported an increase in multiplayer gaming, while 27% stated they were playing less often. For those aged 51 to 60, the percentage of respondents who increased their gaming dropped further to 11%. A similar trend is observed in the oldest age bracket, over 60, where just 11% reported playing more often, and a notable 35% reported playing less frequently, with 54% indicating no change.

Question VG14. Compared to the last 2-3 years, how has your frequency of playing multiplayer-only games changed? (n=44,119)

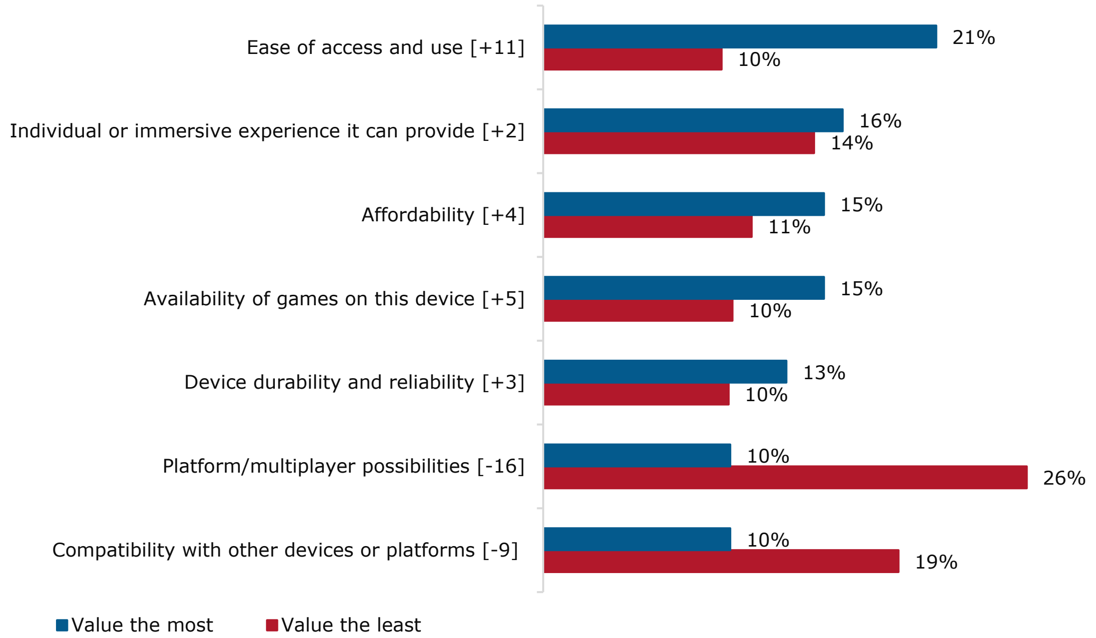


Video game device preferences

When asked about what elements they value the most and the least in a game device, users prefer the most ease of access and use, with 21% of players selecting it, and a net score of +11 percentage points. Conversely, **the least valued aspect is the possibility to play with multiple players,** with 26% marking this factor as the least valuable, resulting in a net score of -16 percentage points.

Compatibility with other devices or platforms also reflects lower favour among users. Individual or immersive experience, availability of games on the device and affordability each had similar preferences, with percentages hovering around 10-16% for both most and least valued options, and moderate positive net scores ranging from +2 to +5 percentage points.

Question VG15. What are the elements you value the most and the least in a game device? (n=44,119)

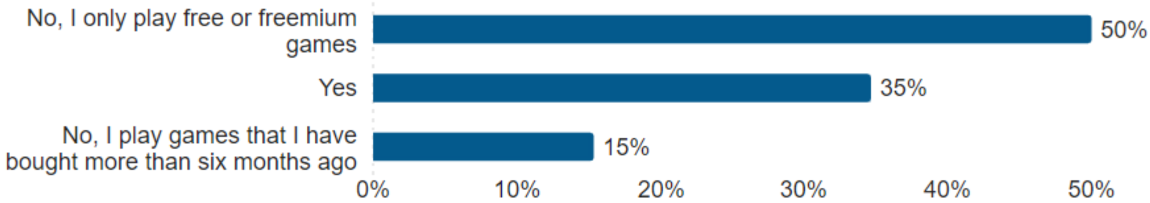


Video games expenditure

In the past six months, **50% of players indicated that their household only played free or freemium games and did not spend any money on video games**. Meanwhile, 35% did spend money on video games, and 15% continued to play games that they had purchased more than six months ago without making additional purchases.

When looking at spending habits on video games over the past six months, segmented by education levels and age groups, it is possible to notice that higher education levels and younger groups are the most likely to have spent money on video games for their households. In contrast, within households of those with lower education and older generations, it is more frequent to play free or freemium games.

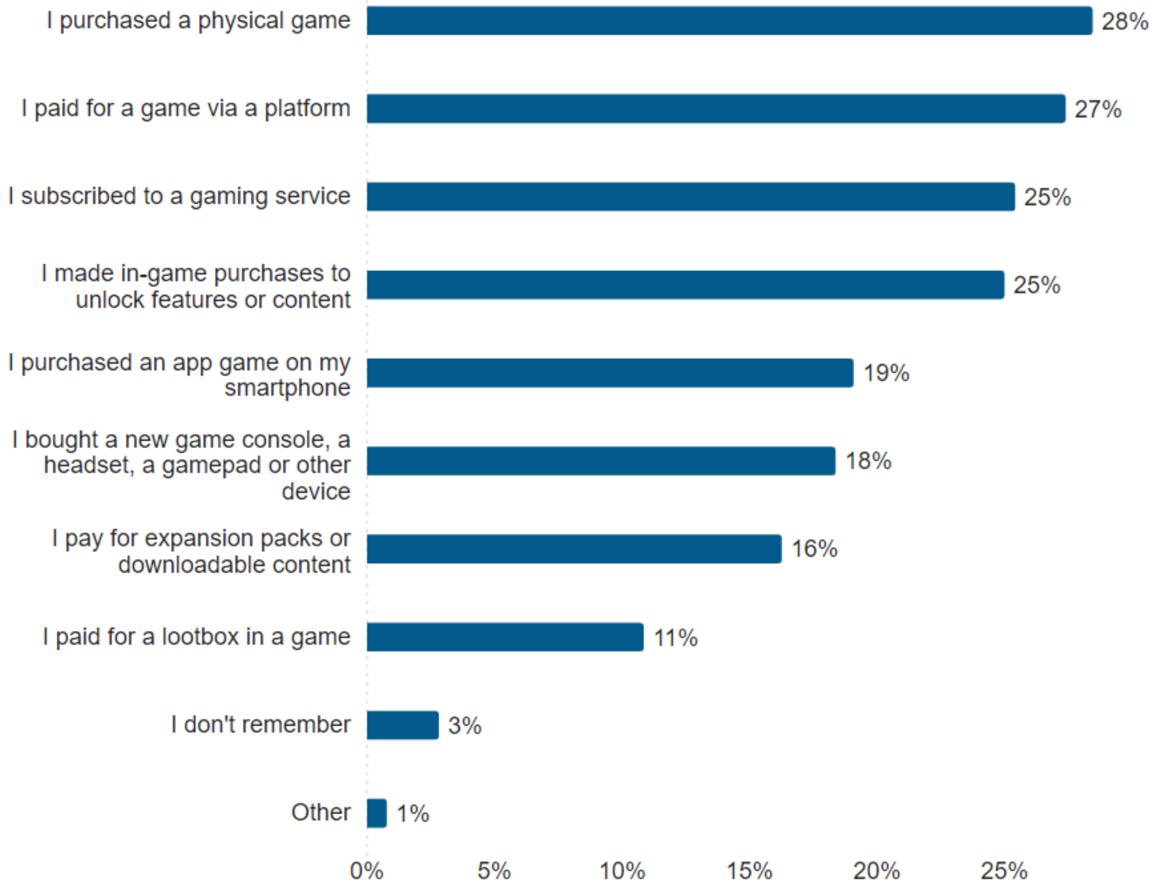
Question VG16. In the last six months, did you spend money on video games for your household? (n=44,119)



Among those households spending money for video games in the last six months, the most common expenditure, reported by 28% of respondents, was for physical games. Then, game purchases via a platform, subscriptions to gaming services and in-game purchases to unlock features or content (e.g., skins, avatars, players) followed by 27%, 25% and 25% of preferences. 19% paid for an app game on their smartphones. The purchase of new gaming hardware, such as consoles, headsets, or gamepads, was reported by 18% of respondents. Fewer respondents, 16%, spent money on expansion packs or downloadable content (DLC), and 11% paid for loot boxes within games. A small percentage (3%) indicated that they could not remember what they paid for recently.[63]

[63] Among those selecting "Other" analysis of the open-text responses reveals that the most common expenses were video games and gaming-related products, including purchases for PlayStation, Nintendo Switch, and Xbox. Additionally, respondents reported spending on in-game currencies, items, and subscriptions (e.g., Robux, Battle Passes). Gift cards for gaming platforms (e.g., Roblox, PlayStation) and gaming equipment (e.g., VR headsets, SD cards) were also mentioned, along with a few references to casino or betting expenses.

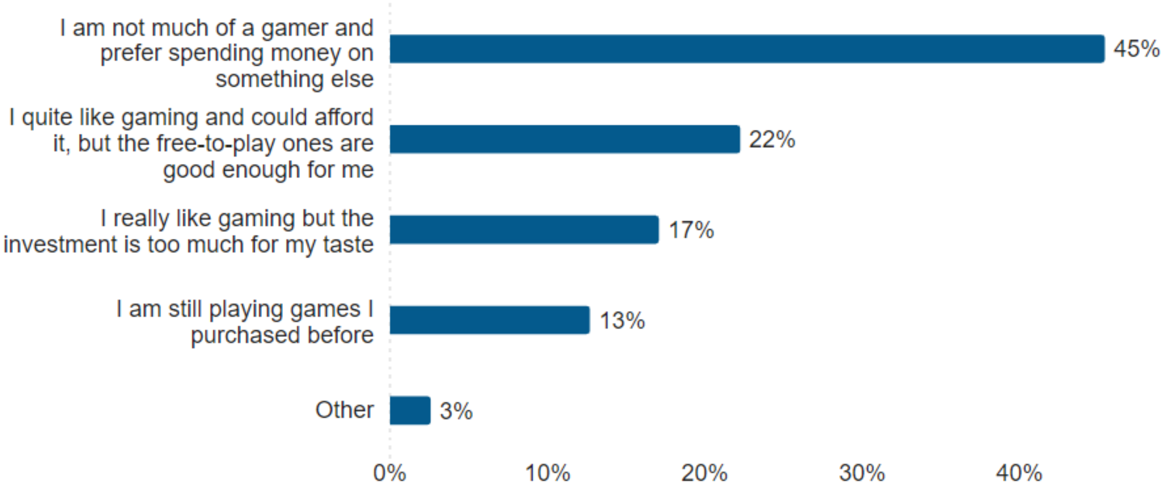
Question VG17. What did you pay for recently for your household? Please select all that apply. (n=15,176, 1.66 average clicks)[64]



When asked about the main reasons for not spending money on video games in the past six months, **45% of players indicated that they are not avid gamers and prefer to allocate their spending to other interests**. Another 22% expressed satisfaction with free-to-play games. For 17% of participants, the cost of investing in games was too high, even though they enjoy gaming. Additionally, 13% mentioned that they are still playing games they purchased previously, and therefore did not feel the need to spend more money.[65]

[64] Question asked only if answer "Yes" was selected in question VG16.
[65] Analysis of open-text responses from those selecting "Other" shows that the most frequently cited reasons include financial constraints or prioritizing essential expenses. Additionally, many respondents mentioned a preference for free games or that they do not play video games frequently enough to justify spending money. Other reasons included dissatisfaction with gaming industry practices, such as microtransactions, or a lack of interest in the available game options.

Question VG18. What is the main reason why you choose not to spend money on video games in the past six months? (n=28,943)[66]



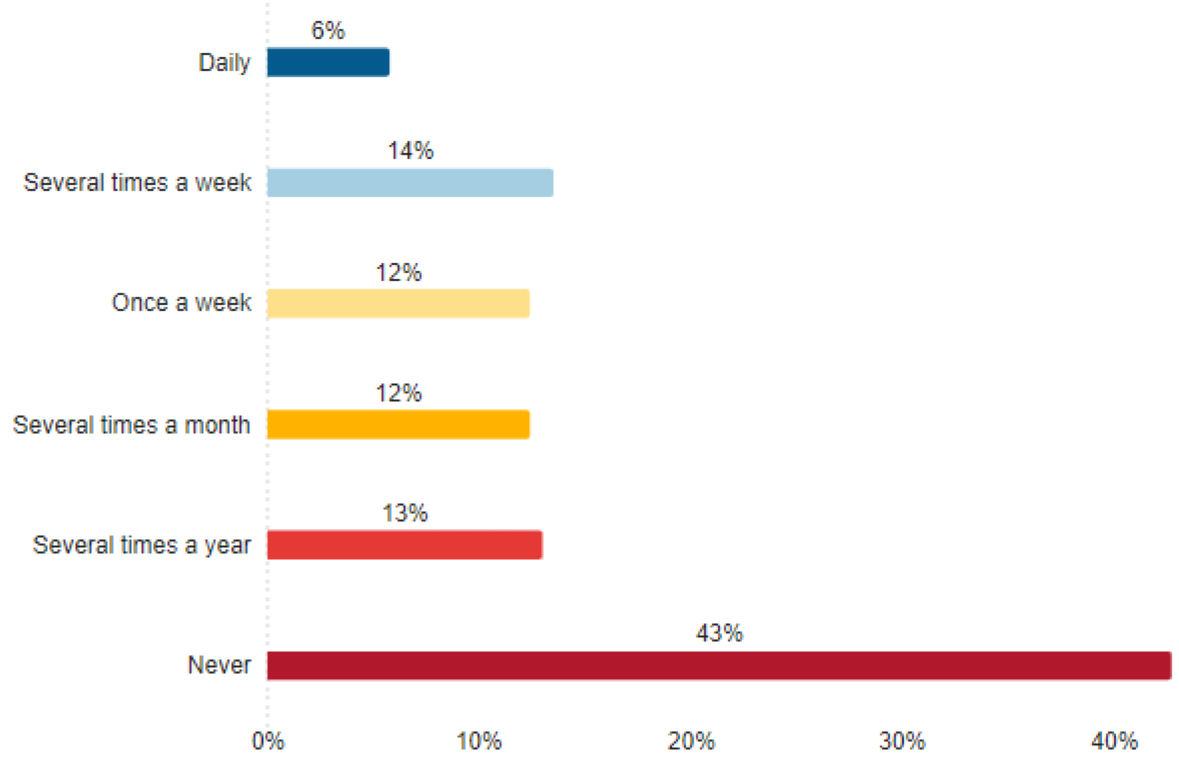
Esports and video gaming stream preferences

A significant portion of players (43%) reported never watching esports or video gaming streams. In contrast, 14% watch several times a week. A smaller share watches once a week (12%), several times a month (12%), or several times a year (13%). Only a small percentage (6%) watch esports and gaming streams daily.

Overall, there is a clear trend where **interest in watching esports or video gaming streams decreases steadily with age**. The proportion of non-viewers grows significantly in the older age groups, while younger respondents report higher levels of engagement. In the 18–30 age group, 7% reported watching esports or video gaming streams daily, while 30% never watched esports or gaming streams. For the 31–40 age range, the proportion of daily viewers remains at 7%, while the percentage of non-viewers increases to 37%, a noticeable rise compared to the younger group. In the 41–50 age group, 6% reported watching esports or video gaming streams daily, and 40% reported never watching gaming streams, showing a further increase in non-viewers. For the 51–60 age range, only 3% watch daily, and a significant 55% reported never watching esports or gaming streams. In the over-60 age group, only 3% watch esports or video gaming streams daily, while 61% reported never watching esports or gaming streams, marking the lowest engagement level among all age groups.

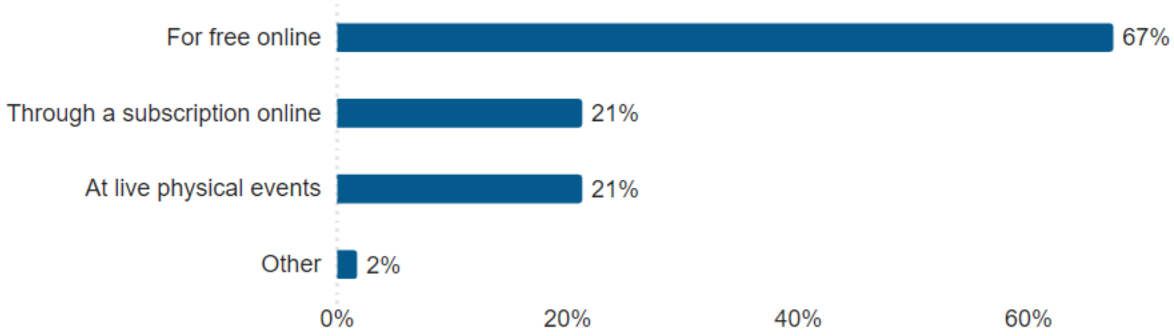
[66] Question asked only if answer "Yes" was not selected in question VG16.

Question VG19. How often do you watch esports or video gaming streams? (n=44,119)



Among those who watch esports or video gaming streams, **the preferred method is to watch them for free online**, with 67% selecting this option. 21% of participants prefer to watch through a subscription service online or enjoy attending live physical events to watch e-sports or video game streams. Among those who attend live physical events, approximately half are under the age of 40 and possess a high level of education.[67]

Question VG20. How do you prefer to watch e-sport or video game live streams? Please select all that apply. (n=27,727, 1 average click)[68]



[67] For question VG16b, analysis of open-text responses from those selecting "Other" shows that the majority prefer watching through traditional TV channels, including "TV," "free television," or "open broadcast TV." Many respondents also indicated that they do not watch e-sports or live streams. Other less frequent mentions included YouTube, Twitch, and public spaces like cafés.
[68] Question asked only if answer "Never" was not selected in question VG19.

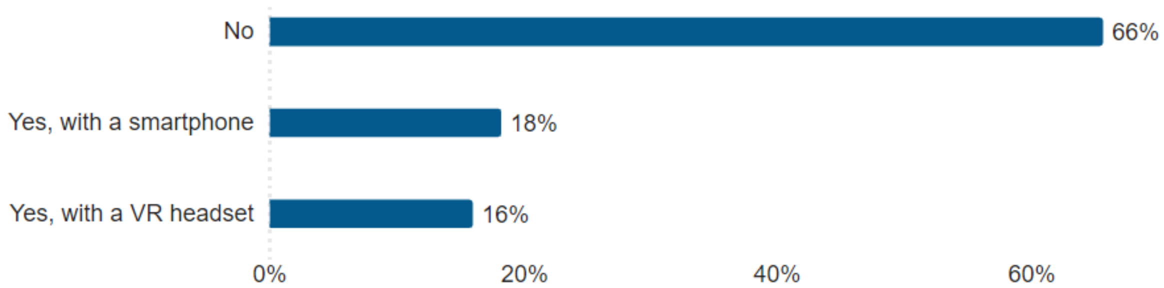
VR and AR preferences in video games

66% of respondents have not yet played any games using VR or AR. The rest have: 18% have used AR-based games with a smartphone, such as Pokémon Go, and 16% have played games using a VR headset.

Among respondents aged 18-30, 23% have used a VR headset, and 28% have used a smartphone for AR-based games, indicating the highest level of engagement with these technologies. As age increases, the use of both VR headsets and AR games declines gradually. In the 31-40 age group, 19% have used a VR headset and 21% have played AR games on a smartphone, with even lower engagement in older age groups. A significant proportion of respondents aged 51 and older report not having played any AR or VR-based games, with around 80% in each of the two oldest groups (51-60 and >60). This suggests a clear decline in VR and AR gaming participation with increasing age.

Similar to younger generations, individuals with higher education show the highest engagement, with 21% using a VR headset and 23% using a smartphone for AR-based games. In contrast, those with medium education levels show slightly lower usage, with 13% using a VR headset and 17% using a smartphone. Among those with lower education levels, engagement with VR and AR games is notably lower, with only 13% using a VR headset and 12% using a smartphone.

Question VG21. Have you played games using VR (virtual reality) or AR (augmented reality)? If yes, what did you use? (n=44,119)



2.4.2. Questions for non-gamers

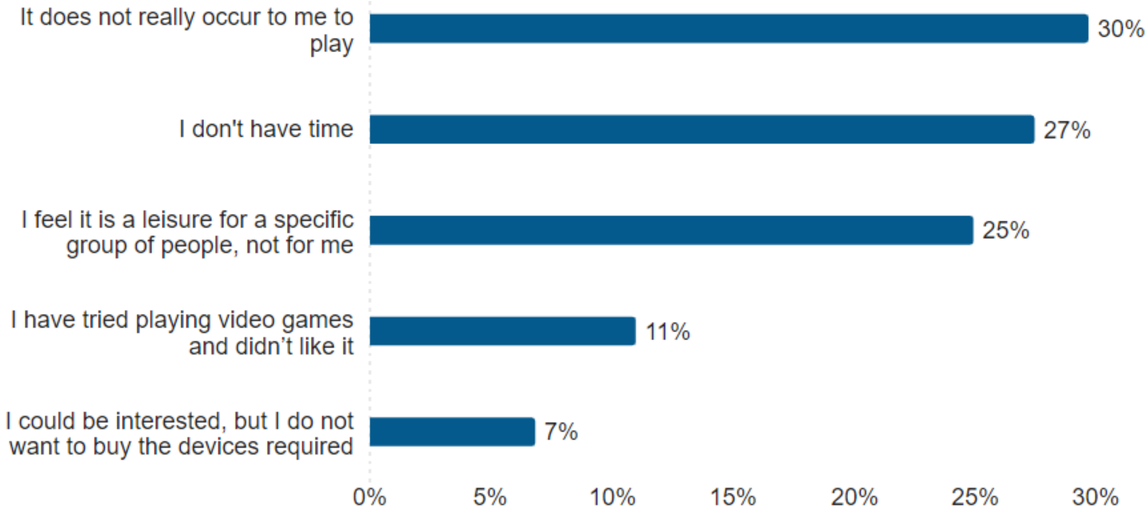
Reasons not to play video games

This section examines the perspectives of non-gamers to gain insights into the broader societal views on gaming beyond active players. By focusing on non-gamers, this section aims to understand how gaming is perceived by those who are not directly engaged with it and to capture a more balanced view of gaming's impact on household habits and spending.

The survey results reveal **several reasons not to play video games among the 25% of respondents stating that they never engage in such activity (n=11,627)**. The most common reason, cited by 30% of non-players, is that it simply does not occur to them to play video games. Another significant factor is time constraints, with 27% of participants stating they do not have time for gaming. For 25%, video gaming is viewed as a leisure activity for a specific group of people, to which they do not belong. Additionally, 11% of non-players tried playing video games but did not enjoy the experience, while 6% expressed interest in gaming but were deterred by the cost of necessary devices, such as consoles or PCs.

Younger groups, particularly those aged 18-30 and 31-40, are more likely to cite time constraints as their primary reason. This indicates a potential willingness to play but barriers related to lifestyle. In contrast, older respondents (aged 51 and over) are more inclined to state that gaming simply does not occur to them, or that they feel gaming is a leisure activity meant for a specific group, which does not include them. These differences highlight that, while younger individuals may face practical barriers to gaming, older groups often express a fundamental disinterest or disconnection with the activity.

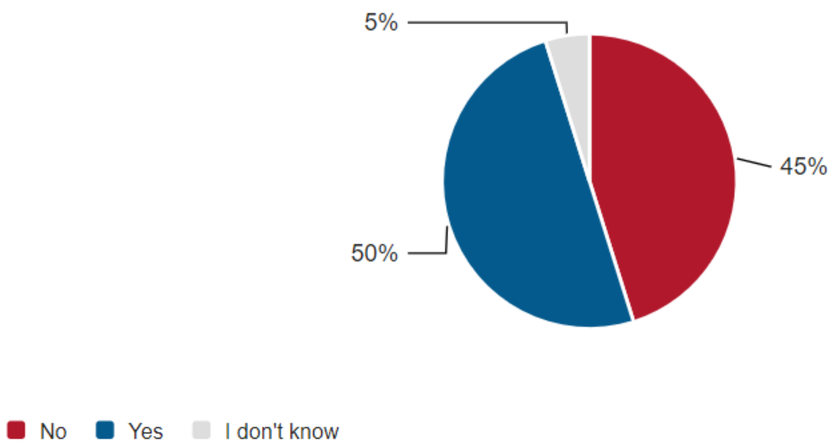
Question VG22. Is there any reason you never play video games? (n=11,627)



Video game consumption preferences within the household

Among respondents who do not play video games and who live with children in their households (n=3,806), the survey found that **half (50%) indicated that their children do engage in video gaming,** 45% reported that their children do not play video games and 5% were unsure.

Question VG23. Do/does your children/child play video games? (n=3,806)[69]



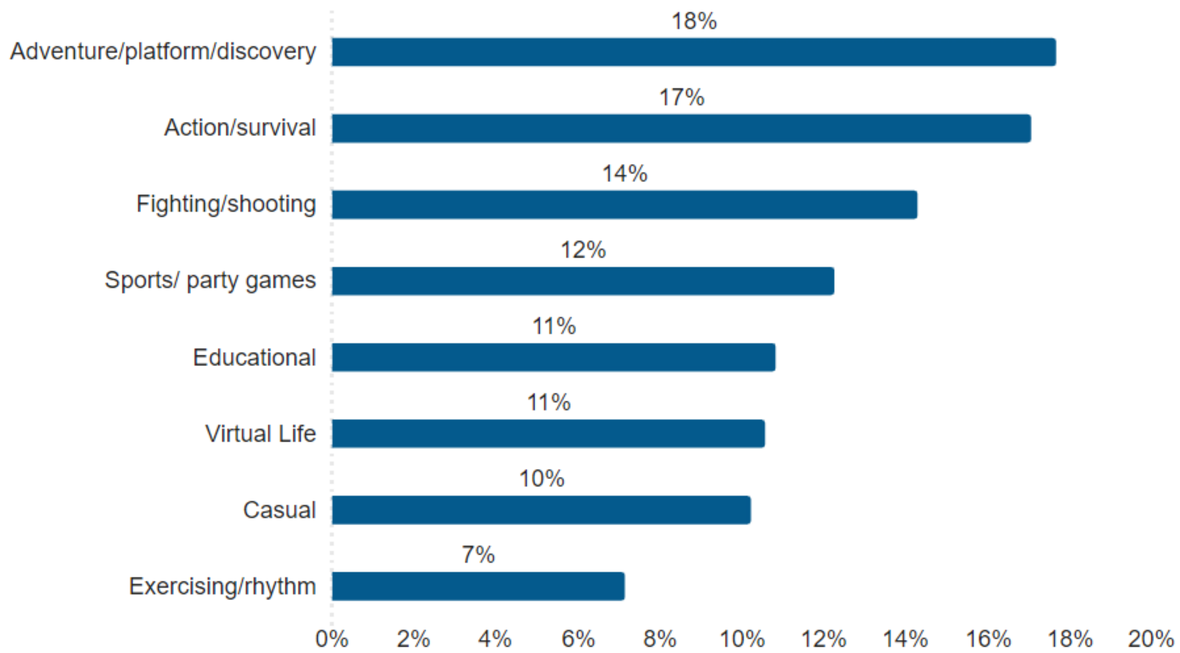
Among non-gamer households with children who play video games, a variety of video game genres are played. The most popular genres include adventure/platform/discovery, action/survival, and fighting/shooting games, played by, respectively, 18%, 17% and 14%. Sports/party games are played in 12% of households.

[69] Question asked only to respondents living with child(ren).

Educational and virtual life games are played each by 11% and casual games, such as puzzles or word games, are enjoyed by 10% of participants' households. Exercising/rhythm games are less common, played by 7%.

Comparing responses of non-gamer households with children who play video games and to those of active players, some differences emerge. In non-gamer households with child players, adventure and action games rank highest, with fighting and sports games being popular too. By contrast, in households with regular players, casual games dominate together with action games, while these are preferred only by 10% of non-gamers' households.

Question VG24. What are the most played genres in your household? Please select all that apply. (n=1,904, 1.7 average clicks)[70]



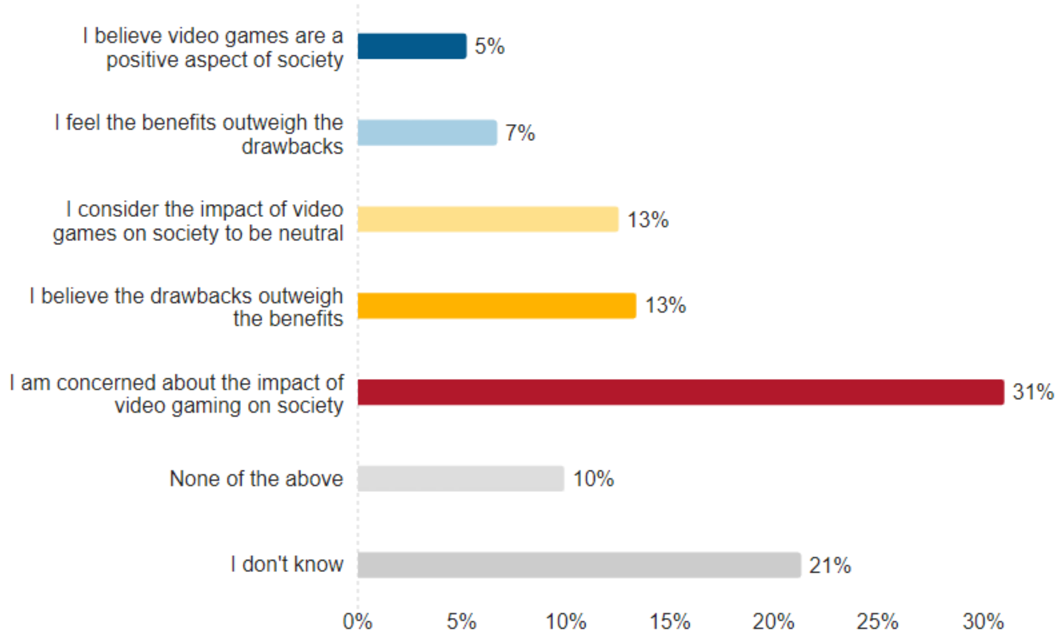
The role of video games in society

The views on the societal role of video games among non-gamers show a mix of perspectives. A significant portion, 31%, expressed concern about the potential negative impacts of video gaming on society. Additionally, 13% see both benefits and drawbacks to video games but feel that the negatives outweigh the positives. On the contrary, only 5% believe that video games are a positive aspect of society and 7% recognise that the benefits are greater than the drawbacks. A neutral stance, viewing the impact of video games as neither significantly positive nor negative, is held by 13% of respondents. Furthermore, 21% of participants were uncertain, and 10% did not align with any of the provided perspectives.

The comparison with respondents who play highlights contrasting perspectives on the societal role of video games. Opinions among gamers are more balanced, with 37% expressing concerns over the negative effects of gaming, but a similar 36% recognising positive contributions. Additionally, a neutral stance is more common among gamers (18%) compared to non-gamers (13%).

[70] Question asked only to respondents living with child/children that play(s) video games.

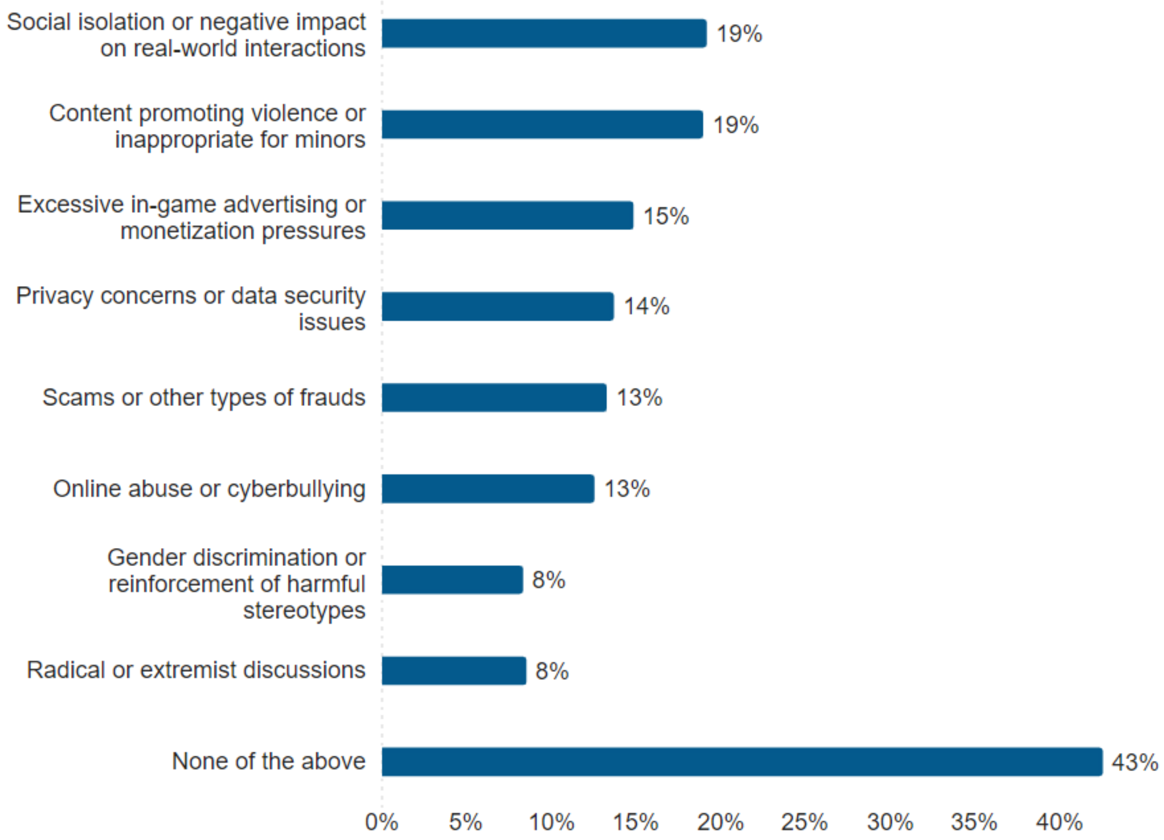
Question VG25. How do you view the role of video games in society? (n=11,627)



Video game consumption issues

Among non-players, a majority (57%) **reported that someone in their household had encountered significant issues while playing video games in the last two years**. 19% mentioned that players in their households either experienced social isolation or came across content promoting violence or inappropriate material for minors. 15% mentioned excessive in-game advertising or monetization pressures and 14% selected privacy concerns or data security issues. Other issues reported include scams or fraud (13%), online abuse or cyberbullying (13%), gender discrimination or reinforcement of harmful stereotypes (8%), and radical or extremist discussions in-game chats or forums (8%).

Question VG26. In the last two years, while playing video games, have you in your household encountered any of the following issues? Please select all that apply. (n=1,904, 1.33 average clicks)[71]



Video games expenditure

When it comes to spending money on video games, **45% of respondents indicated that their households only play free or freemium games and have not spent any money on video games in the past six months,** slightly lower than the 50% of player households who reported the same. Another 25% reported that they have not spent money on video games recently, as they continue to play games purchased more than six months ago, compared to 15% of players. In contrast, 30% of respondents' households have spent money on video games within the last six months. A greater proportion of player households (35%) have spent money on video games within the last six months, suggesting that players are marginally more likely to invest in new games or in-game purchases.

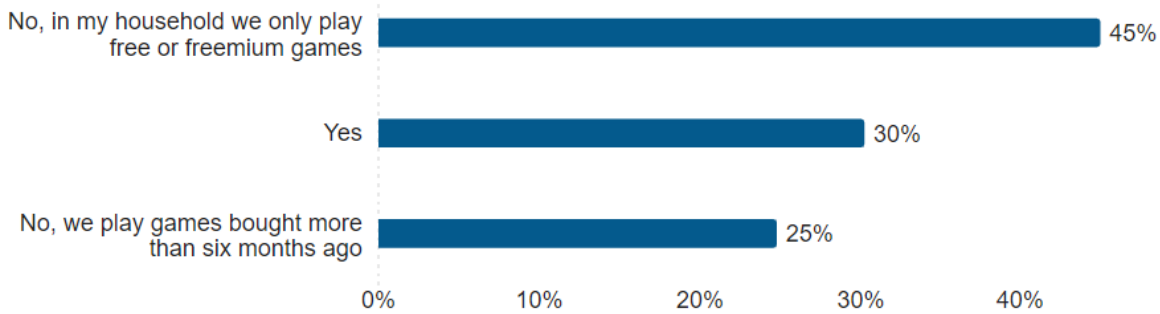
Younger non-players (18-30) are more likely to have spent money on video games for their households, with 43% indicating they made purchases. In contrast, the 31-40 and 41-50 age groups have higher proportions of individuals who primarily play free or freemium games, with a corresponding decline in those spending money on games. For those aged 51-60, only 18% reported spending money on video games. However, among those over 60, nearly half (49%) did spend money on games recently.

Individuals with higher education are more likely to spend money on video games, with 35% indicating recent purchases. Those with medium education show a similar pattern. In contrast, among individuals with lower education, only 11% reported spending money

[71] Question asked only to respondents living with child/children that play(s) video games.

on video games in the last six months. A significant 48% primarily play free or freemium games, and 41% continue playing older purchased games.

Question VG27. In the last six months, did you spend money on video games for your household? (n=1,904)[72]

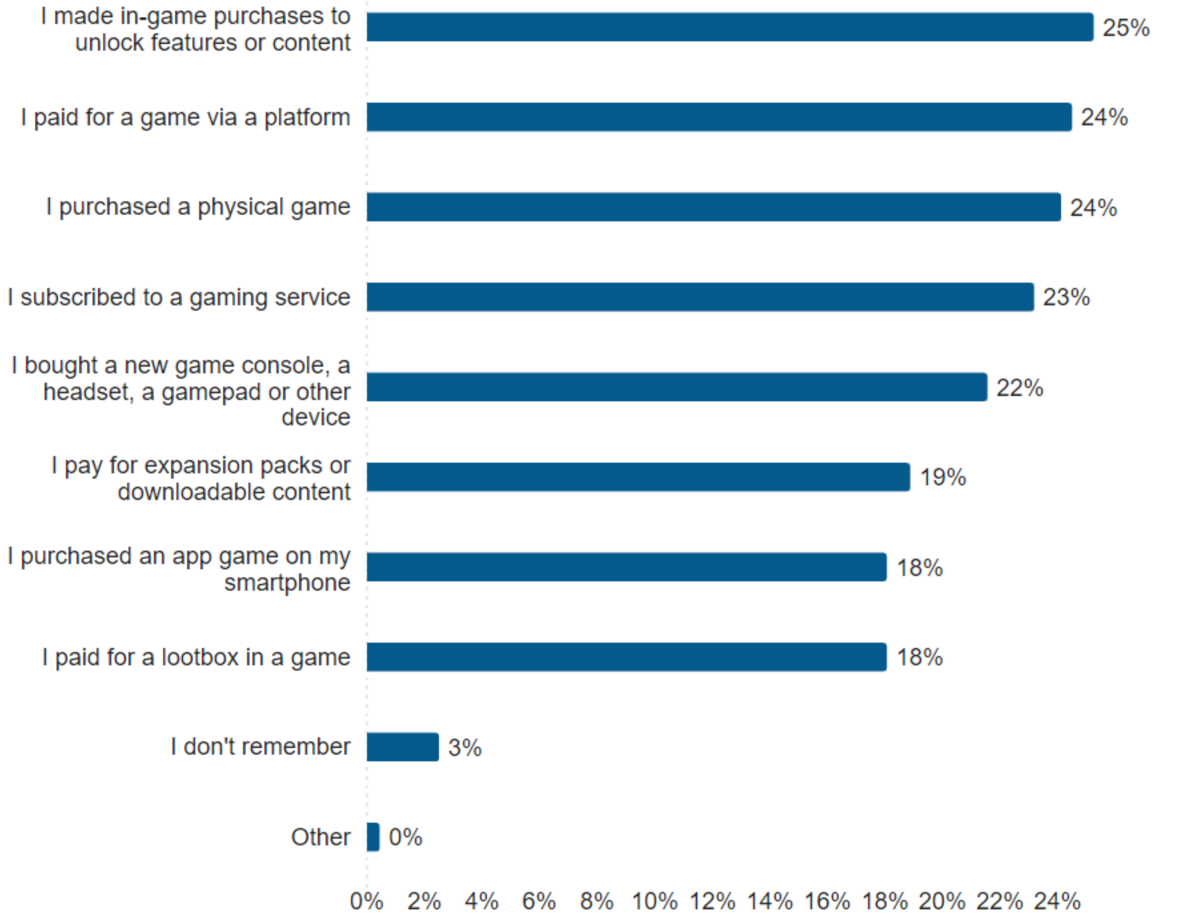


Among those who have spent money in video games for their household in the last six months, **the most common recent expenditures include in-game purchases to unlock features or content**, such as skins, avatars, or players, reported by 25% of respondents. Paying for a game via a platform and physical game purchases were each reported by 24% of participants. Subscriptions to gaming services, such as Xbox Game Pass, were made by 23% of respondents, while new gaming hardware, such as consoles, headsets, or gamepads, was bought by 22% of participants. Additionally, 19% of respondents paid for expansion packs or downloadable content (DLC). App games on smartphones and loot boxes were purchased each by 18%.

Comparing spending patterns among players and non-players' households, slightly different priorities emerge. Player households' top expense is physical games (28%), followed closely by platform purchases (27%) and subscriptions (25%), while non-players most frequently spend on in-game purchases to unlock features and game purchases (both platform and physical). Moreover, non-players report higher spending on new gaming hardware (22%) compared to players (18%), while players spend more on smartphone app games (19% vs. 18%) and less on expansion packs/DLC (16% vs. 19%) and loot boxes (11% vs. 18%).

[72] Question asked only to respondents living with child/children that play(s) video games.

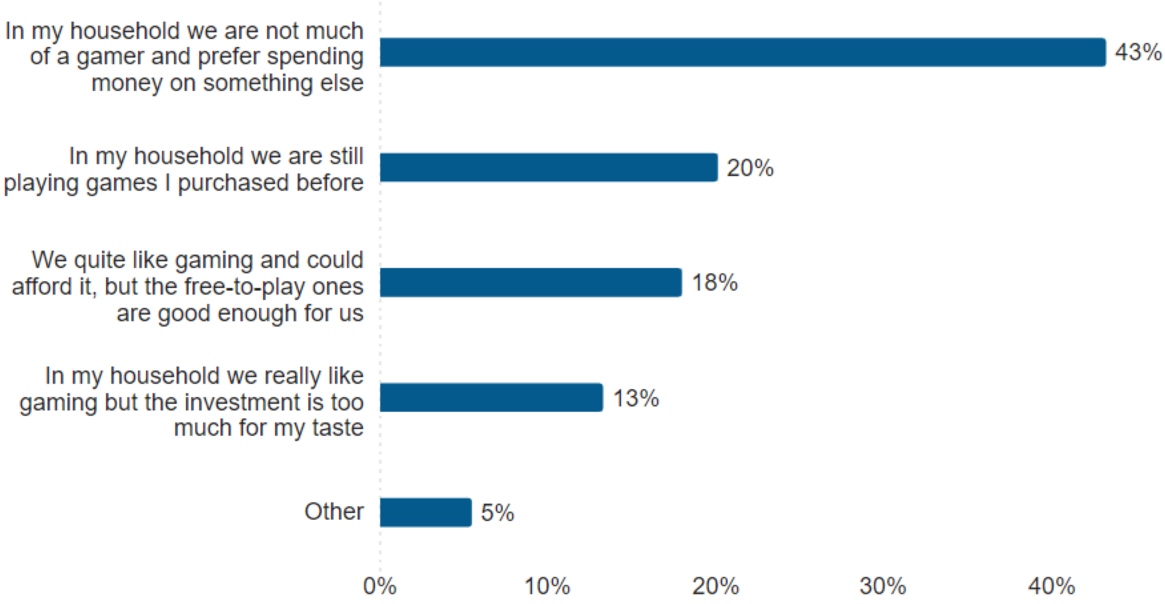
Question VG28. What did you pay for recently for your household? Please select all that apply. (n=732, 1.21 average clicks)[73]



Among those who did not spend money on video games for their households, the main reason is that gaming is not a significant interest for their household, with 43% of respondents preferring to allocate their spending to other activities, similar to players responses. Another 20% indicated that they are still playing games purchased previously and did not feel the need to buy new ones, compared to only 13% of players. For 18% of participants, the availability of good-quality free-to-play games is sufficient, making additional purchases unnecessary. Players are slightly more satisfied with free-to-play games, with 22% selecting this option. Meanwhile, 13% expressed interest in gaming but found the investment too high, compared to 17% of players.[74]

[73] Question asked only if answer "Yes" was selected in question VG27.
[74] For question NVG3c, respondents who selected "Other" for why they choose not to spend money on video games often mentioned lack of interest in gaming or indicated that they do not play video games themselves. Some cited financial constraints or viewed games as a waste of money. Others noted that it is their children or grandchildren who play, and these individuals either fund their own gaming or live separately. Additionally, some respondents expressed concerns about gaming addiction and prefer to avoid it altogether.

Question VG29. What is the main reason why you choose not to spend money on video games? (n=1,172)[75]



2.4.3. Further assessment of results

Perception of gaming

It appears that **concerns about gaming do not strongly deter individuals from either playing games or watching e-sports**. Even among those who see drawbacks in gaming, there is still active participation in both gaming and e-sports viewing. This may suggest that, while concerns exist, they do not have a significant impact on overall engagement with the gaming industry.

Motivations and spending patterns

The motivations behind why heavy and non-heavy gamers play video games are largely similar, with only some differences in intensity and engagement levels. For both weekly (heavy) and monthly (non-heavy) gamers, the primary motivation to play is stimulation—seeking excitement, challenge, and immersion in the gaming experience. This is followed by motivations such as competition, the enjoyment of the experience itself, interest in narrative and storytelling, social interaction, and learning.

While these core motivations remain consistent across both groups, **heavy gamers, are far more likely to invest financially in gaming**, with 42% of players active at least once a week paying for video games compared to just 7% of those who play monthly. This willingness to spend indicates that heavy gamers see gaming as a more integral part of their lives and are willing to invest in premium experiences, downloadable content, or subscriptions.

Additionally, weekly gamers are more likely to engage with the wider gaming culture through platforms like e-sports. **About 38% of heavy gamers use e-sports video gaming streams every week**, compared to 15% of non-heavy gamers. This suggests that frequent players not only enjoy playing games but also immerse themselves in the

[75] Question asked only if answer "Yes" was not selected in question VG27.

competitive and social aspects of the gaming community, such as watching live-streamed games or professional competitions.

Virtual Reality (VR) Gaming

VR gaming tends to attract a specific profile of players, with a clear distinction between heavy and casual gamers. The data shows that **individuals who engage in gaming every week are significantly more likely to use VR**, with 18% of weekly gamers utilising VR compared to only 5% of those who play less frequently.

It appears this technology is still seen as a niche or specialised form of gaming, likely due to the higher cost of VR equipment and the steeper learning curve compared to more traditional gaming options. Casual gamers, who typically engage with games more sporadically, may find VR less accessible or may not see it as a necessary investment for their level of involvement in gaming.

E-store preferences of video game spenders

Among those who spend money on video games, a range of e-stores capture their attention, each serving as a preferred destination for game purchases. The PlayStation Store emerges as the most popular platform, with 19% of respondents indicating it as their primary choice. Close behind is the Google Play Store and Steam, each favoured by 18%. The App Store attracts 13% of respondents as their go-to platform for purchasing games, while Microsoft’s Xbox Game Store sees 7% of preferences. Epic Games Store follows, catering to 5% of respondents.

Interestingly, a small segment (4%) rarely or never engages with e-stores for game purchases. Meanwhile, the Nintendo e-shop holds a 4% share among these buyers, with the EA e-store slightly lower at 3%. VR game-specific stores, such as those by Meta or Viveport, attract 2% of respondents.

Other smaller platforms find their niches too: GoG, game company-owned e-stores, Humble Bundle and Green Man Gaming appeal to around 1% or 2% of respondents.

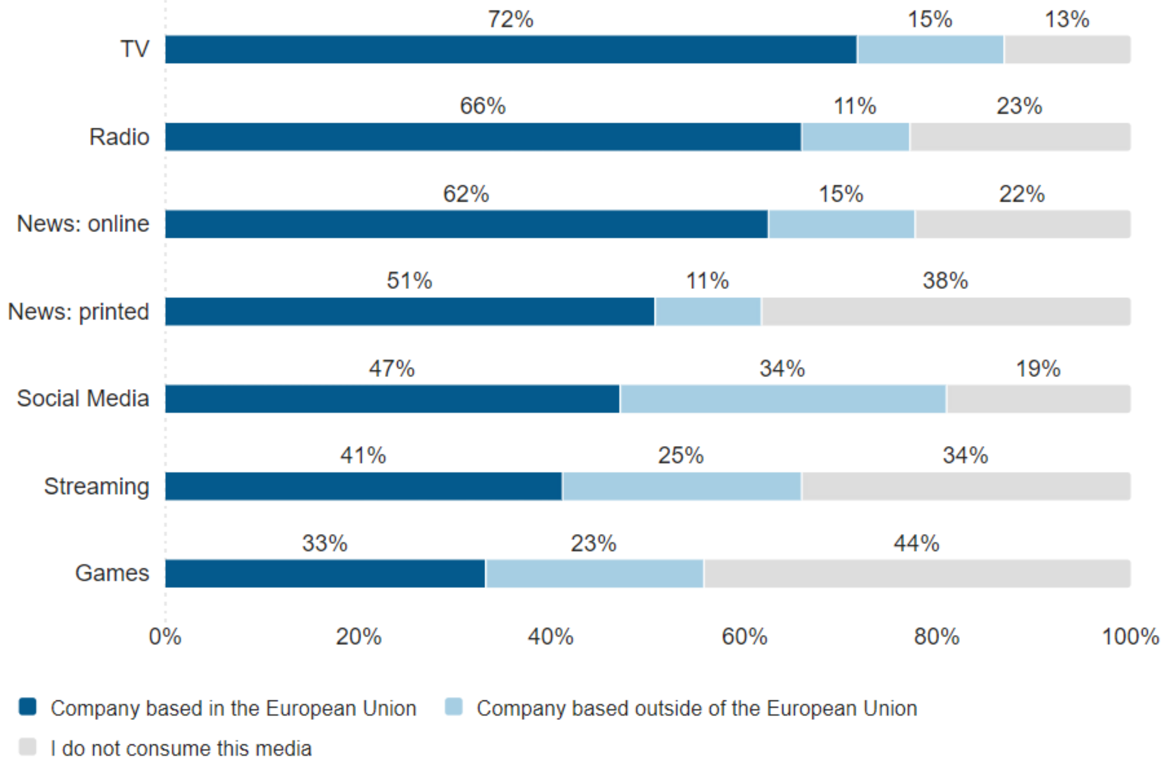
2.5. Technology and innovation trends in media consumption

2.5.1. Overall consumption trends

Perception of EU vs non-EU market shares

Most respondents think that the platforms they use to consume media content are companies based in the EU. This trend is especially pronounced for TV, with +57 percentage points (72%-15%) between respondents thinking that the TV platforms they use are primarily European and those who think that they are primarily non-European. Radio also shows a high reliance on EU platforms, with 66% of participants believing to rely on EU-based radio platforms, rather than on non-EU platforms (11%), with a net score of +55 percentage points. Online and printed news is also frequently deemed to be consumed on EU-based platforms, with, respectively, a net score of 47 (62%-15%) and 40 (51%-11%) percentage points in favour. Games, streaming services and social media are the categories with the higher percentage of users who believe they are using a non-EU platform. It is important to clarify that responses to this question do not necessarily reflect the market reality (with social media, 47% of users declare using EU-based platforms, whereas the market structure is dominated by US-based platforms).

Question T1. Would you say that the platforms on which you watch/ read the following media content generally are EU-based/not EU-based: (n=23,169)



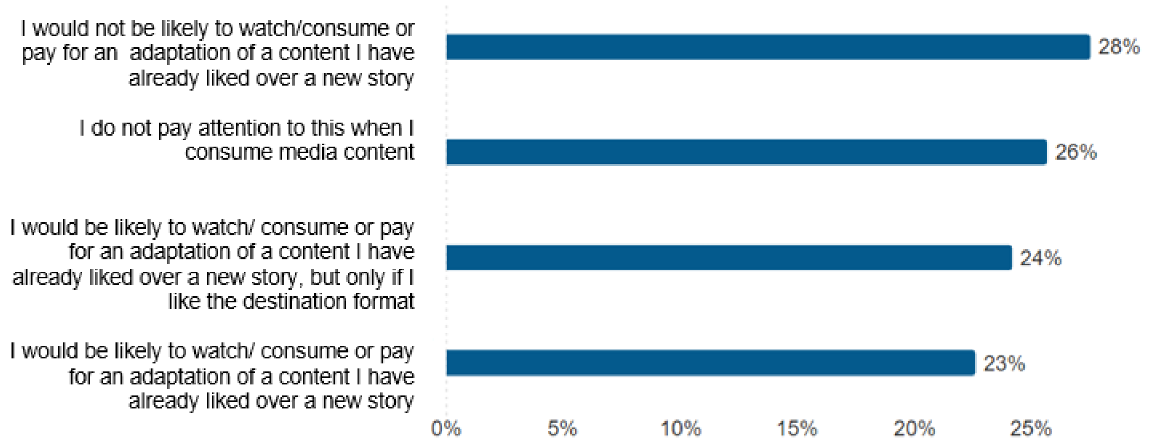
Intellectual Property

Respondents show a moderate inclination towards engaging with adaptations of content they have already enjoyed. 24% indicated they would likely watch, consume, or pay for an adaptation, but only if they liked the destination format. 26% reported that they do not consider whether content is an adaptation or a new story when choosing media to consume. Only 23% are inclined to do so in any case. On the contrary, 28% of respondents prefer to engage with entirely new stories rather than adaptations.

Younger respondents, particularly those aged 18-30 and 31-40, show mixed preferences between watching an adaptation over a new story and being influenced by the destination format, with approximately 31%-35% of each group indicating interest in both cases. In these groups, fewer respondents (19%) expressed a clear disinterest in adaptations.

As age increases, preferences shift noticeably. In the 41-50 age group, fewer respondents prioritise watching adaptations. For those aged 51-60 and over 60, there is a marked increase in reluctance to watch adaptations, especially among the oldest group, where 40% would not choose adaptations and 37% explicitly do not pay attention to this factor.

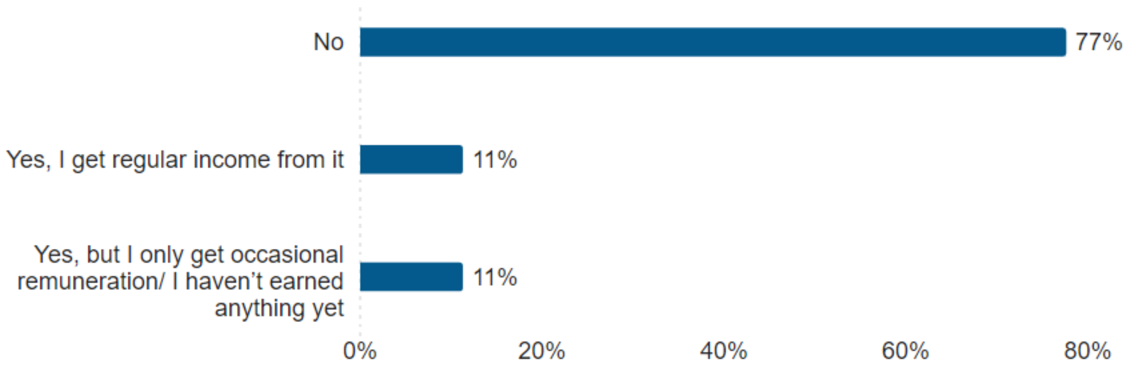
Question T2. Imagine a book, video game, film, or series that you enjoyed. How inclined are you to watch, consume, or pay for a copy of its adaptation in another format compared to engaging with a completely new story? (n=23,169)



Content created by Internet users

As much as 22% of respondents declare having created media content like podcasts, blogs or short videos, intending to get income from it, and half of them say that do profit from it regularly. These results indicate a market of user-generated content bigger than it is known from other sources; therefore, results have been further investigated in Annex V. Research limitations.

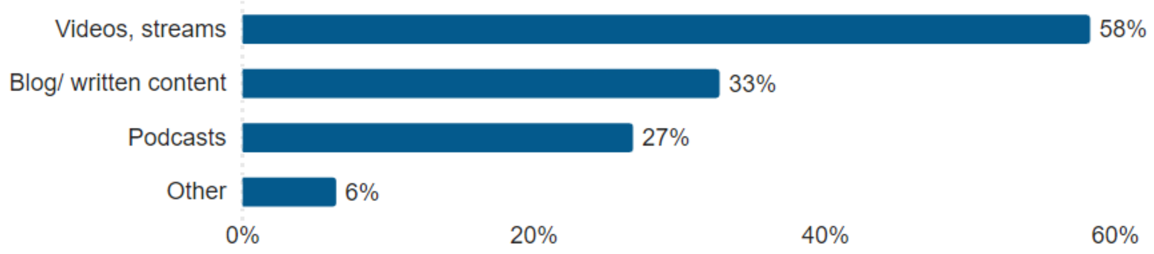
Question T3. Have you ever created and shared content (podcast, short videos or blogs) on platforms like YouTube, Spotify, and App stores, to get remuneration from it? (n=23,169)



Among those who create and share content, **videos and streams are the most popular**, with 58% of content-creating respondents declaring having produced this type of media.

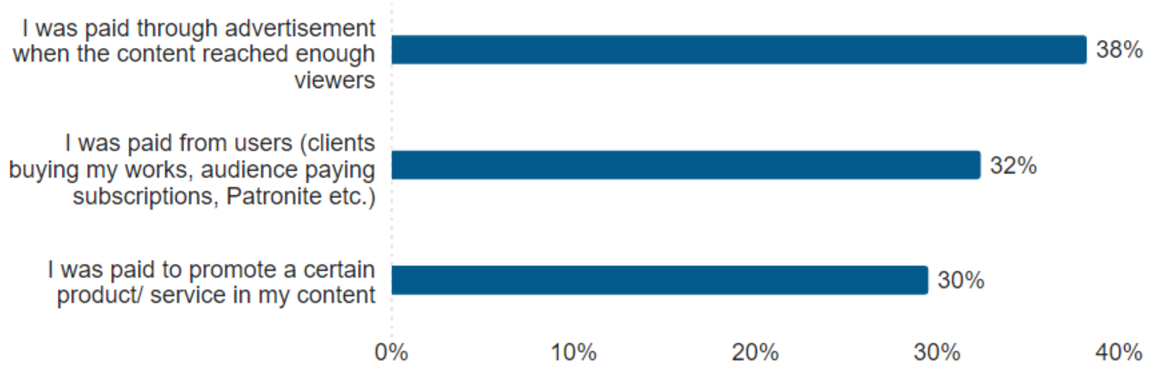
Blogs and written content are also commonly shared, with 33% of creators engaging in this activity and 27% of creators declaring participating in podcasts.

Question T4. What type of media content do you create and share? Please select all that apply. (n=6,274, 1.07 average clicks)[76]



For those who have earned money from their online content, **38% reported being paid through advertisements** once their content reached a sufficient number of viewers. Another **32% earned income directly from users**, such as clients purchasing their works or audience members paying subscriptions. Additionally, **30% received payment for promoting specific products or services** within their content.

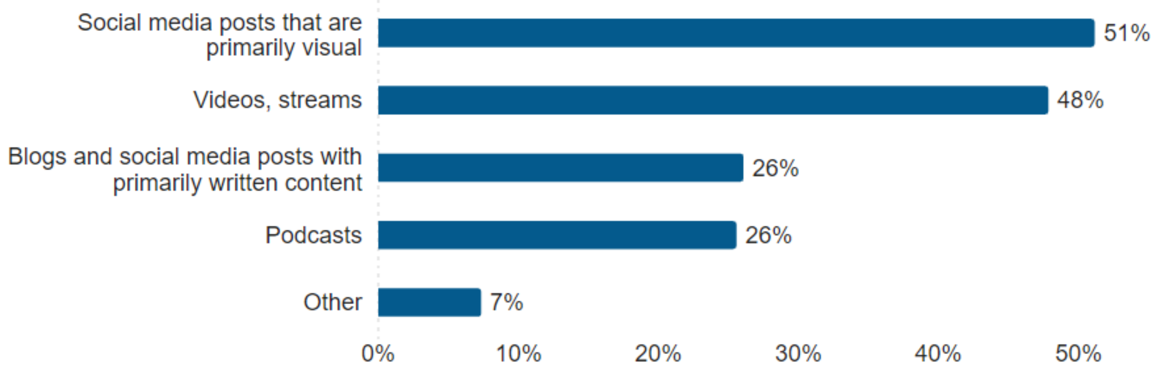
Question T5. How did you get remuneration from sharing your content online? (n=6,274)[77]



Another question looked at the user-generated content from the perspective of demand, finding that respondents frequently consume a variety of content generated by other users. The most popular types are visual social media posts, followed by 51% of participants, and videos and streams, consumed by 48% of respondents. Blogs and written content on social media and podcasts are each followed by 26%.[78]

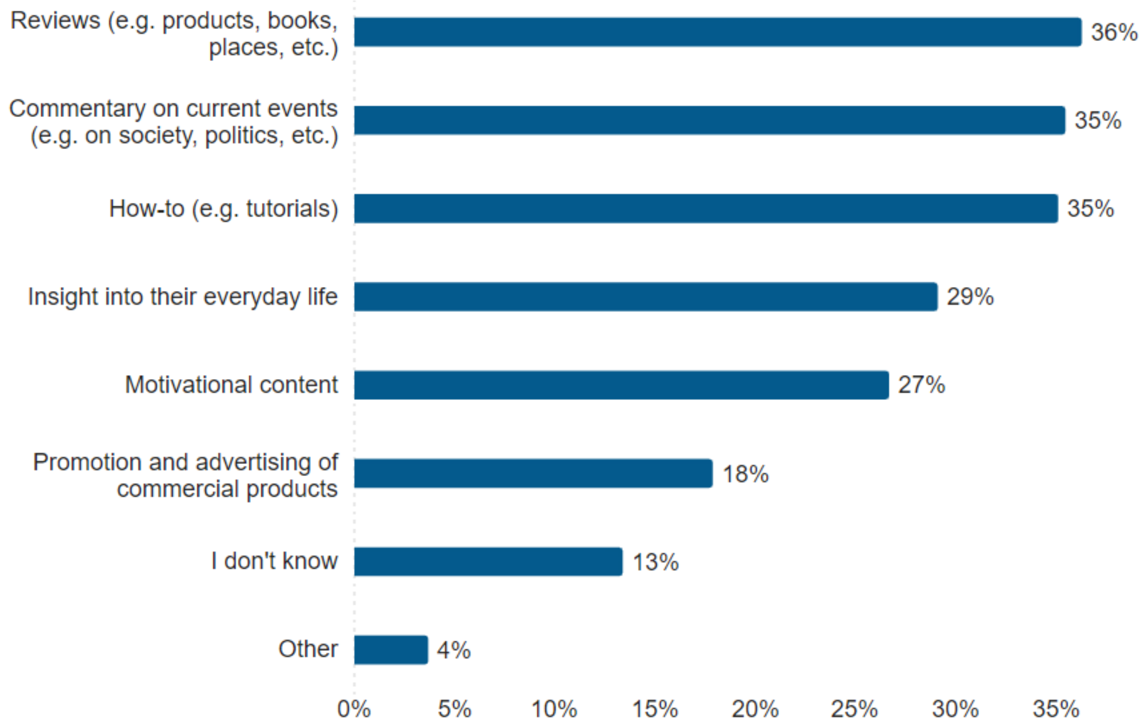
[76] Question asked only if answer "No" was not selected in question T3.
[77] Question asked only if answer "No" was not selected in question T3.
[78] For question T6, analysis of open-text responses from those selecting "Other" shows that many respondents do not engage with online content published by other users, with several stating explicitly that they do not read, watch, or listen to such content. Others mentioned specific platforms like Facebook, YouTube, and Reddit, while some noted preferring traditional media formats like radio or TV over user-generated content.

Question T6. What kind of online content published by other users do you read, watch or listen to? Please select all that apply. (n=23,169, 1.64 average clicks)



Among the various topics of user-generated content, online reviews are the most popular, consumed by 36%. Commentary on current events, such as society and politics, and how-to tutorials are of major interest to 35% of respondents. 29% are interested in insights into everyday life, while motivational content is followed by 27%. Promotional or advertising content is followed by a smaller percentage of respondents (18%).[79]

Question T7. What kind of topics published by other users do you read, watch, or listen to? Please select all that apply. (n=23,169, 2.05 average clicks)



[79] For question T5, analysis of open-text responses from those selecting "Other" shows that the most commonly mentioned topics include true crime, humor, and educational content such as science, history, and cooking. Other frequent responses involve animal and nature-related content, gaming videos, and music. A significant number of respondents indicated that they do not consume any user-generated content or that they focus exclusively on topics related to personal interests like travel, fitness, and spirituality.

VPN

The use of VPNs among respondents varies, with **48% stating they never use a VPN**. 25% use a VPN rarely, and **only 14% regularly**. Another 13% indicated they do not currently use a VPN but have done so in the past.

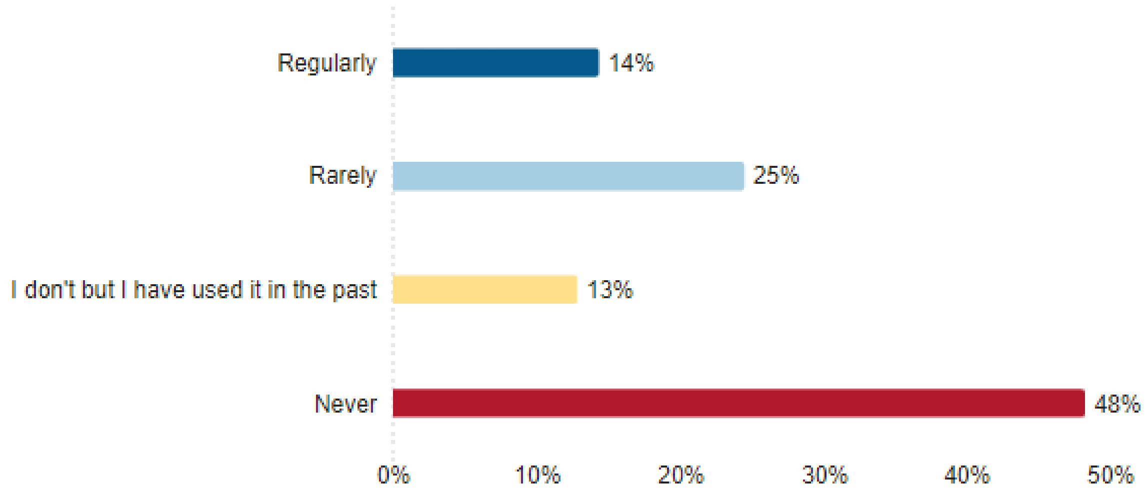
Younger respondents and those with higher education levels are more frequent users of VPNs. Among younger age groups (18-30, 31-40 and 41-50), regular VPN usage is more common, with around 14-19% using it regularly, compared to just 12% among older age groups. In contrast, the over-60 age group shows the highest proportion (63%) of respondents who have never used a VPN, against 36% of those aged 18-31.

There is **no significant difference between men (16% of them are regular users) and women (13%) when it comes to VPN usage**. Similarly, **no strong correlation can be found between VPN use and employment status and family structure**—whether someone lives alone or with others, or has children, seems to make no difference. **The same is true for the type of environment they live in**, be it a city, town, or rural area.

Those with a more comfortable financial situation are more likely to be regual users of VPNs (19%, against 12% of thoe living in an uncomfortable financial situation ans 14% of those able to meet their basic needs).

When education levels are considered, those with higher education demonstrate greater engagement with VPNs. Among higher-educated individuals, 17% use VPNs regularly and 28% rarely, while only 42% have never used them. In comparison, respondents with lower education show significantly less engagement, with 58% reporting no use of VPNs and just 12% using them regularly and 18% rarely.

Question T8. How often do you use a VPN? (n=23,169)

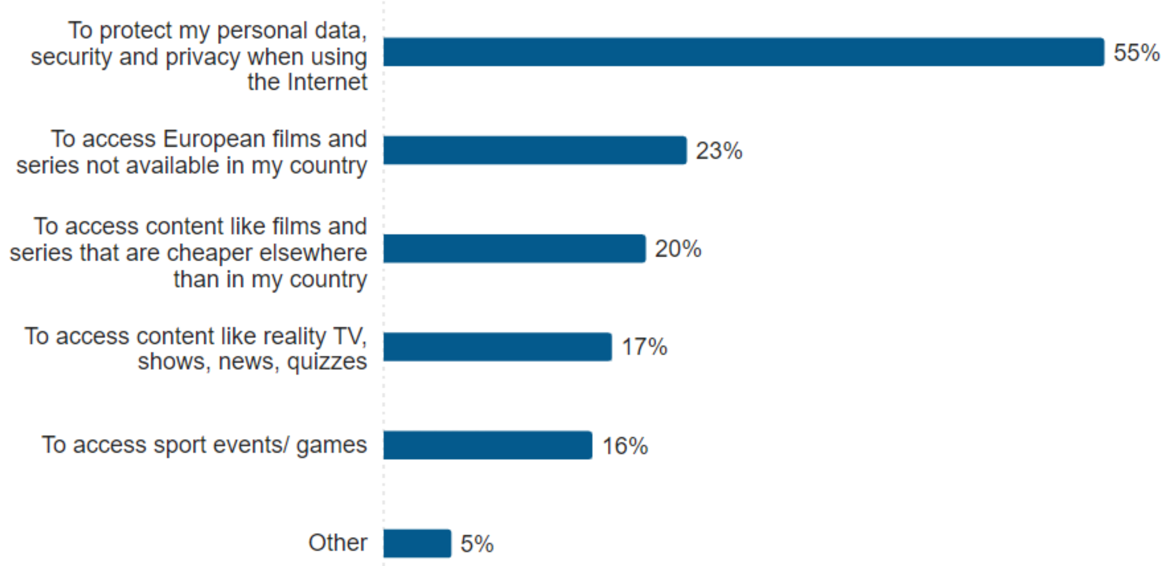


Among those who use or have used VPNs (every respondent except those selecting "Never", so 52% of all), **the primary reason, selected by 55% of respondents, is to protect personal data, security, and privacy while using the Internet**. Additionally, 23% of relevant respondents (12% of all respondents) use VPNs to access European films and series not available in their country. Another 20% use VPNs to access content like films and series that are cheaper elsewhere, while 17% use them to access content like reality TV shows, news, and quizzes. Accessing sports events or games is a reason for 16%.[80]

When considering age, older respondents, particularly those aged 51-60 and over 60, are more likely to use VPNs for personal data protection, with 50% and 54% respectively indicating this reason. In contrast, younger age groups, particularly those aged 18-30 and 31-40, demonstrate a broader range of motivations beyond security, including accessing European films and series not available in their country and content cheaper elsewhere.

In terms of education, no major differences are present.

Question T9. For which reasons have you used a VPN? Please select all that apply. (n=13,123, 1.29 average clicks)[81]



Exchange of data

Respondents are divided on the issue of sharing data in exchange for free media content. 41% are willing to share their data to save money or because they do not consider it an issue. On the contrary, 59% expressed privacy concerns and preferred to pay or avoid consuming media for free.

There is a noticeable link between one's financial situation and their willingness to share personal data. Of those who report that their financial situation allows them to live comfortably, 51% are unwilling to share their data. However, this reluctance is even more pronounced among those with a financial situation that allows them to meet their daily needs only partially or not at all, where 61% decline to share their data, and among those with an uncomfortable financial situation (62%). Despite this, there is no significant difference in media spending between those who are willing to share their data and those who are not, suggesting that privacy concerns do not necessarily affect how much people spend on media content.

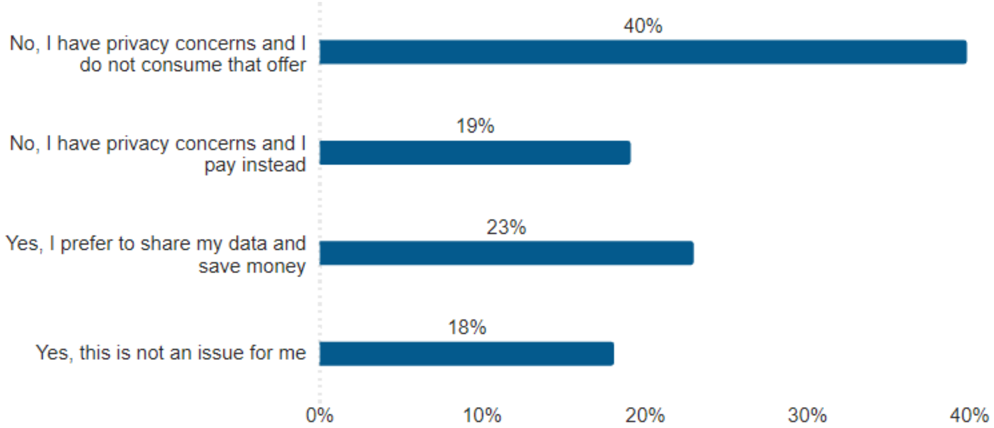
[80] For question T9, analysis of open-text responses from those selecting "Other" reveals that the primary reason for VPN usage is work-related purposes, including accessing company networks, remote work, or using company-specific tools. Additionally, respondents mentioned using VPNs for academic purposes, such as accessing university resources or research articles unavailable in their region. Other less frequent reasons include bypassing geographical restrictions for accessing streaming services or content not available in their home country.

[81] Question asked only if answer "Never" was not selected in question T8.

When looking at age groups, those aged 18-30, 31-40 and 41-50 display a more balanced view. Approximately half of these groups (46-49%) are willing to share their data, either seeing it as not an issue or preferring to do so to save money. However, the proportion of respondents expressing privacy concerns and preferring to pay or opting out entirely increases significantly with age. Among those over 60, 71% express privacy concerns, with 59% refusing to participate in such offers entirely.

Considering education levels, those with higher education are the most open to sharing their data, with around 47% expressing a willingness to share compared to 39% among those with medium education and just 36% among those with low education. On the other hand, lower-educated respondents are the most likely to opt out due to privacy concerns, with nearly half (48%) declining to participate, compared to only 32% of higher-educated individuals.

Question T10. Do you agree to share your data in exchange for free media consumption you like? (23,169)



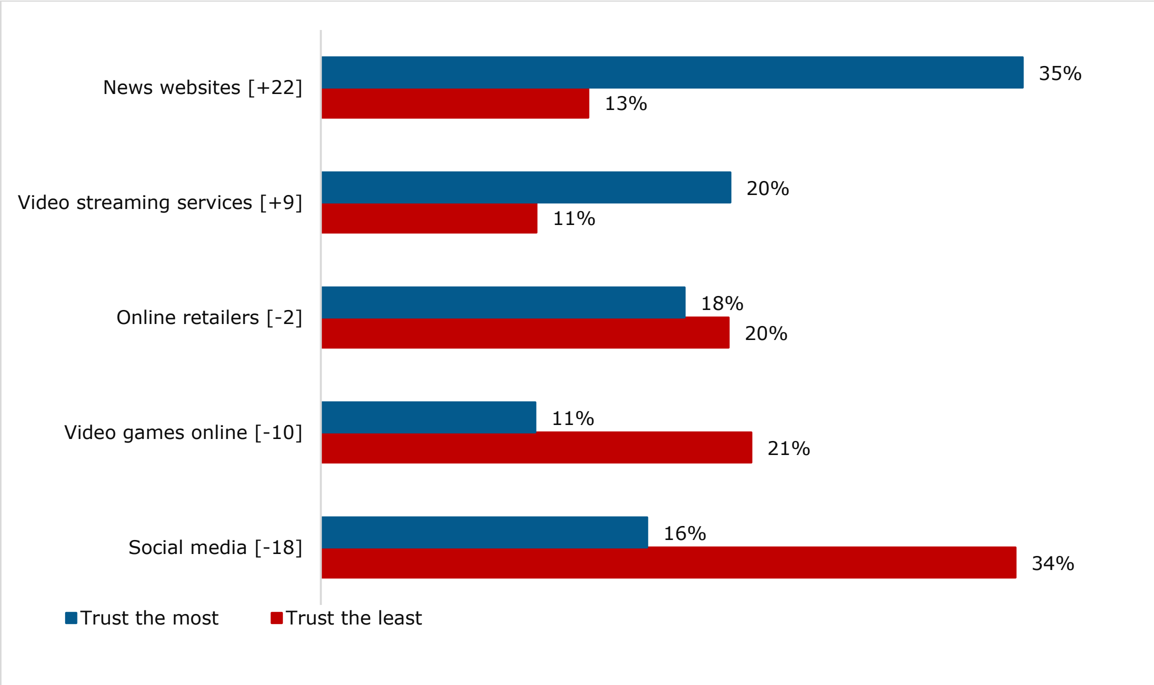
Trust in sources and data privacy

When it comes to data privacy, respondents expressed **varying levels of trust across different platforms**.

a. **News websites garner the most trust**, with 35% of respondents identifying them as their most trusted option. Interestingly, this is offset by a net score of +22 percentage points, indicating a relatively high confidence in this category despite 13% expressing it as the least trustworthy.
b. **Video streaming services are viewed positively** by 20% of respondents, who chose these platforms as the most trusted for sharing their data, earning them a net score of +9 percentage points. However, 11% still expressed significant concerns, marking them as the least trustworthy for many.
c. **In the case of online retailers, the sentiment is almost evenly split;** 18% trust them the most, while 20% list them as the least trustworthy, resulting in a marginally negative net score of -2 percentage points. This suggests a mixed perception of e-commerce platforms' handling of personal data.
d. When it comes to video games online, only 11% of participants reported trusting these platforms the most, while 21% identified them as the least trusted, contributing to a net score of -10 percentage points. This points to a **significant gap in confidence towards online gaming services regarding data security**.
e. Finally, **social media fares the worst**, with 34% of respondents expressing a lack of trust in these platforms. Only 16% trust social media the most, leading to a

concerning net score of -18 percentage points. This stark contrast reflects widespread scepticism about the privacy and data-sharing practices prevalent on social media networks.

Question T11. Who do you trust the least and the most when sharing your data? (23,169)



Virtual and Augmented Reality

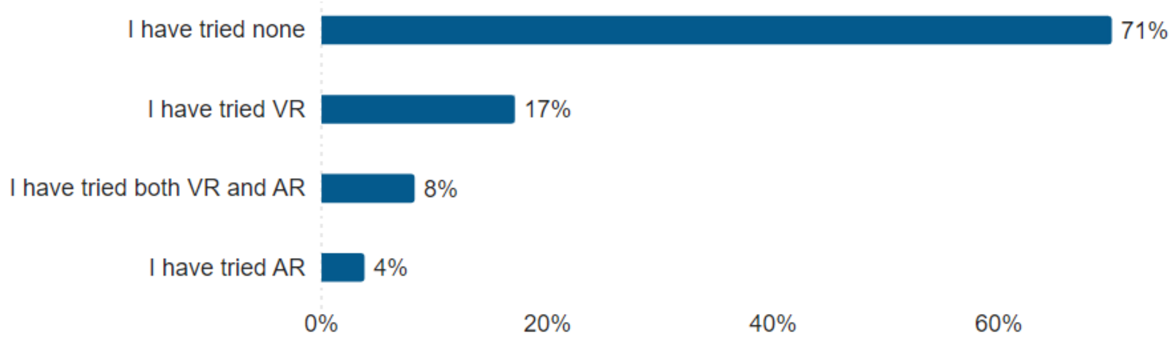
Despite the increasing integration of immersive technologies in daily life, there remains a significant disparity in awareness between VR and AR. **71% of respondents reported not having experienced either technology**. However, **17% have used VR, a technology that is more easily recognizable** due to its distinctive hardware like headsets. Interestingly, **8% have tried both VR and AR**, while only **4% identified having used AR alone**. These low results for AR awareness have been further investigated in Annex V. Research limitations.

When examining the impact of knowledge, pricing, and accessibility on the adoption of immersive technologies, several demographic patterns emerge. **There is no gender difference between VR/AR users and non-users, but age plays a significant role**. Younger respondents, particularly those aged 18-30, are the most experienced with VR and AR technologies, with 53% having tried VR and/or AR, against 47% having tried none. As age increases, the experience with these technologies diminishes significantly. In the oldest age group (over 60), a vast majority (89%) declare to not have tried either VR or AR, highlighting a clear generational gap in adopting these technologies.

Education also correlates with AR/VR adoption. When comparing education levels, those with higher education are significantly more likely to have explored VR and AR. Among highly educated individuals, 40% have tried VR and/or AR. In contrast, those with lower education levels show minimal engagement with VR and AR, with 81% indicating no experience with either technology and only 19% having tried them.

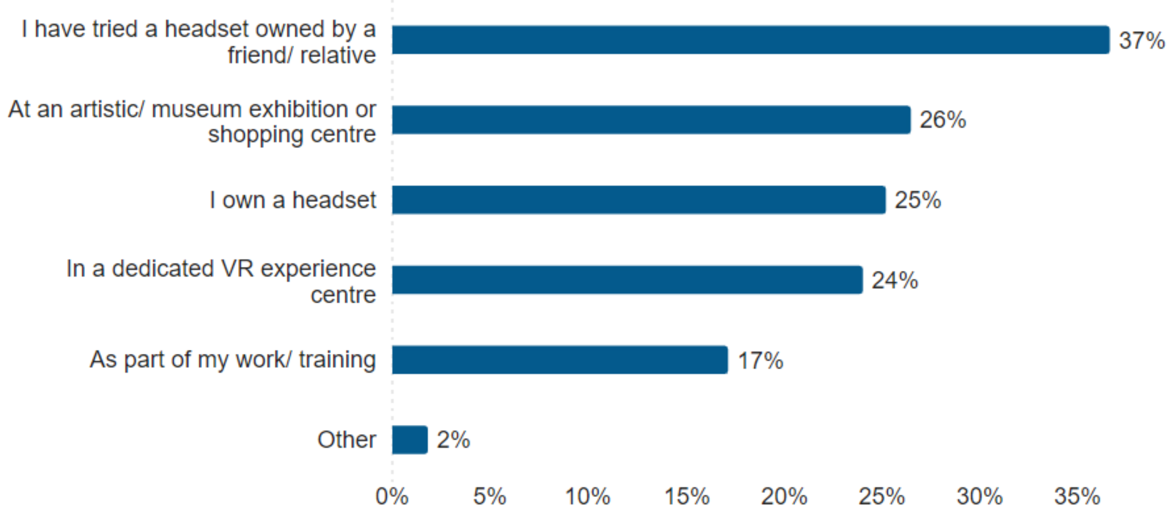
Geographically, **AR/VR users are less likely to live in rural areas**, and economically, **they tend to have a more comfortable financial situation** (44% of them used AR/VR, against 27% able to meet their basic needs and 22% with an uncomfortable financial situation), reflecting a demographic that is both urban and more financially equipped to explore newer technologies.

Question T12. Have you tried Virtual Reality (VR) and/ or Augmented Reality (AR)? (n=23,169)



Among those who have tried VR, **the most common setting is using a headset owned by a friend or relative**, with 37% of respondents indicating this. 26% tried VR at artistic or museum exhibitions or shopping centres and 25% of participants own a VR headset. Dedicated VR experience centres were tried by 24% of respondents. Additionally, 17% have used VR as part of their work or training. These findings suggest that the frequency of use is not intense for a majority of respondents who do not own headsets.[82]

Question T13. In which environment have you tried VR? Please select all that apply. (n=7,590, 1.06 average clicks)[83]

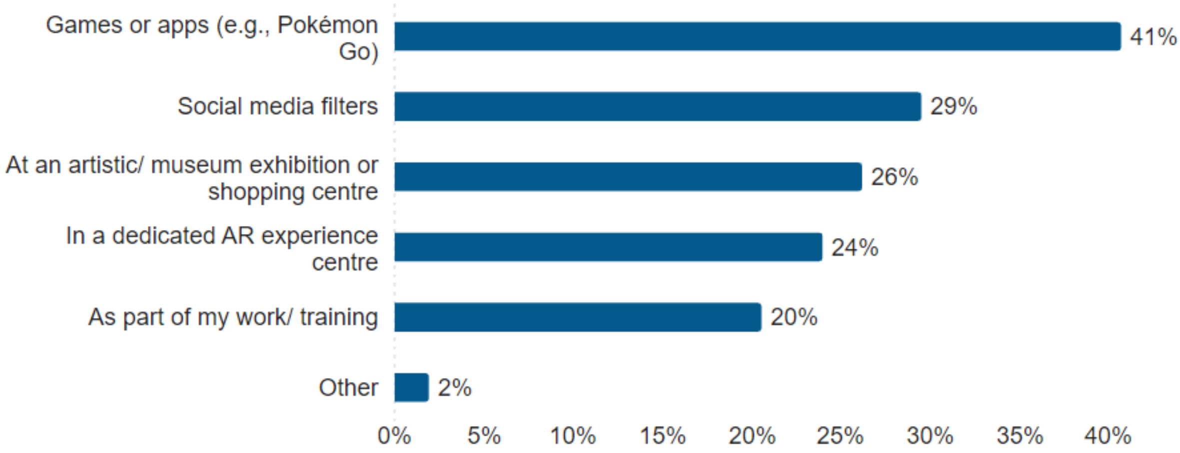


For AR experiences, **41% of respondents who were aware of using AR, say that they have tried AR through games or apps** like Pokémon Go. Social media filters were recalled by 29% of respondents, and 26% experienced AR at artistic or museum

[82] For question T13, analysis of open-text responses from those selecting "Other" indicates that the most common environments where respondents have tried VR include at a friend's house, at home with personal VR equipment, and gaming centres or arcades. Other environments mentioned less frequently include events or exhibitions, schools, and theme parks. Some respondents also noted using VR for rehabilitation purposes or property tours.
[83] Question asked only if answer "I have tried VR" or "I have tried both VR and AR" was selected in question T12.

exhibitions or shopping centres. Additionally, 24% of respondents tried AR in a dedicated experience centre, and 20% used it as part of their work or training.[84]

Question T14. In which environment have you tried AR? Please select all that apply. (n=3,381, 1.22 average clicks)[85]



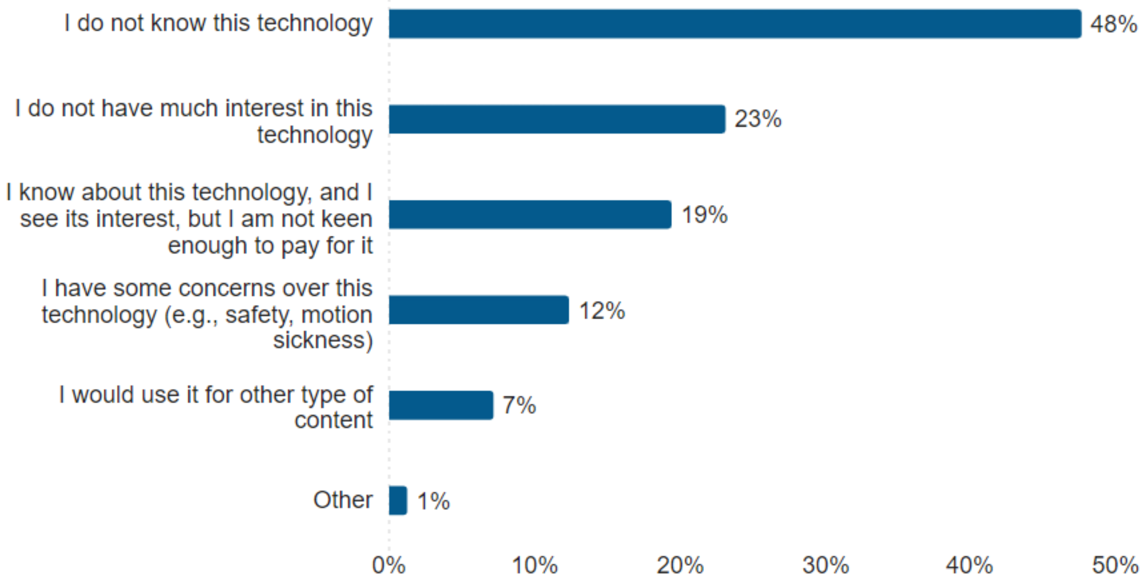
Among those who are not aware of ever having tried VR or AR, opinions on these technologies are varied. A significant portion, 48%, do not know much about these technologies. 23% do not have much interest in VR or AR, while 19% acknowledge their potential but are not keen enough to pay for them. Meanwhile, 12% of respondents have some concerns about VR and AR, such as safety or motion sickness. Finally, 7% declare that they are not interested in the type of content that could be commonly consumed with these technologies (e.g., video games) but would use XR to consume other types of content (e.g., sports).[86]

[84] For question T14, analysis of open-text responses from those selecting "Other" shows that respondents most commonly tried AR at a friend's house or at home using personal devices. Many also mentioned using AR features via mobile applications, such as GPS navigation, furniture shopping apps, or online stores. Less frequent mentions included events, museums, and in their vehicles for augmented navigation displays.

[85] Question asked only if answer "I have tried AR" or "I have tried both VR and AR" was selected in question T12.

[86] For question T9d, analysis of open-text responses from those selecting "Other" indicates a range of perspectives on VR/AR technology. Some respondents expressed interest in trying VR/AR, but noted financial constraints as a barrier. Others mentioned concerns about the disconnect from reality or the potential negative impact on human consciousness. A number of participants also stated they lacked experience or opportunities to use the technology, while some dismissed it entirely, stating they have no interest or do not find it relevant to their lives.

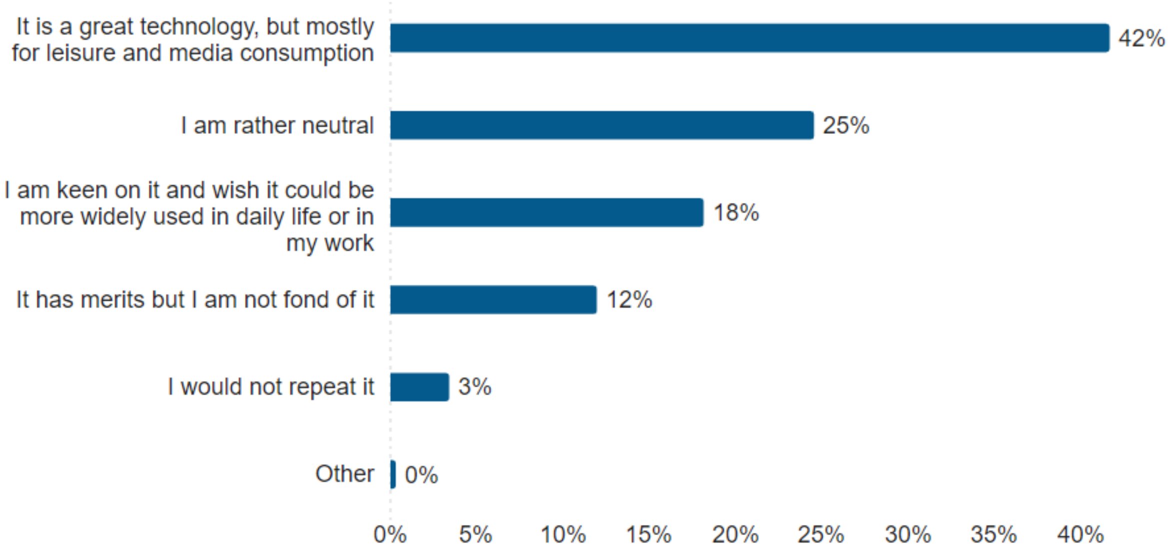
Question T15. Which of the following reflects your view on VR/ AR applications? Please select all that apply. (n=14,533, 1.3 average clicks)[87]



Respondents who have used VR and/or AR had mixed experiences. A majority, 42%, feel that while the technology is great, it is mainly suitable for leisure and media consumption. 25% are neutral towards the technology, and 18% are keen on it and wish it could be more widely used in daily life or work. Meanwhile, 12% recognize the merits of VR and AR but are not particularly fond of them. Only 3% of respondents would not repeat the experience with these technologies again.[88]

[87] Question asked only if answer "I have tried none" was selected in question T12.
[88] For question T9e, open-text responses from those selecting "Other" highlight a mix of reactions. Some participants described positive experiences, noting VR/AR as immersive and valuable for technical learning. However, several reported physical discomfort, such as dizziness, nausea, or discomfort due to the heaviness of the device. Others expressed reservations about frequent use, citing concerns over potential negative impacts on real-life engagement or compatibility issues with prescription glasses.

Question T16. How was your experience in using VR/ AR? (n=8,636)[89]

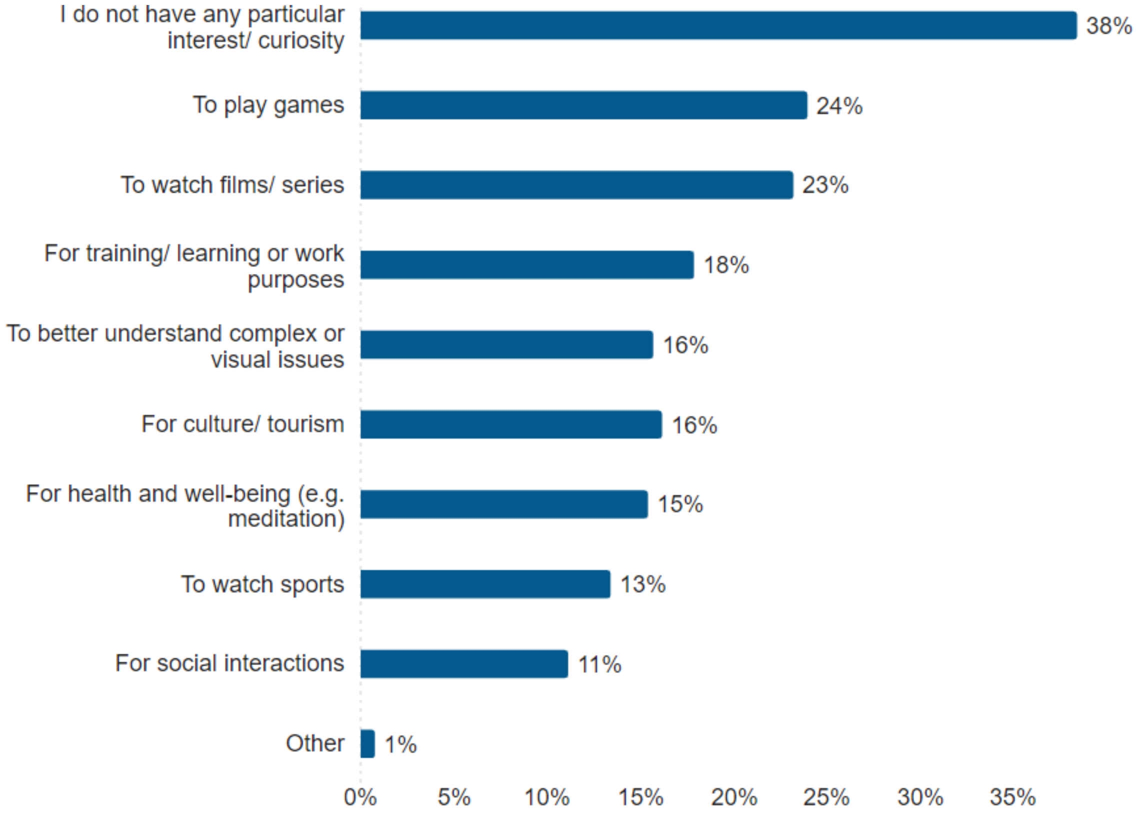


The survey reveals that **gaming is the most popular potential use for AR/VR**, with 24% of respondents expressing interest. Watching films or series and using AR/VR for training, learning, or work purposes each attract 23% and 18% of respondents, respectively. Other potential uses include to better understand complex issues (16%), health and well-being (15%), culture or tourism (16%), to watch sports (13%) and social interactions (11%). However, **38% of respondents do not have any particular interest in using AR/VR.**[90]

[89] Question asked only if answer "I have tried VR" or "I have tried AR" or "I have tried both VR and AR" was selected in question T12.

[90] For question **T10**, the analysis of open-text responses reveals a range of views. Many respondents expressed **no interest** in using AR/VR in any environment, with several stating explicitly that they are **uninterested** or **unfamiliar** with the technology. Others mentioned **specific applications** such as **virtual exhibitions**, **documentaries**, or **virtual home tours for refurbishment**. A few respondents also showed interest in **fantasy worlds** or **entertainment** contexts like **trying on clothes** or viewing **live demonstrations**.

Question T17. In what environment would you be interested in using AR/VR? Please select all that apply. (n=23,169, 1.82 average clicks)



Artificial Intelligence

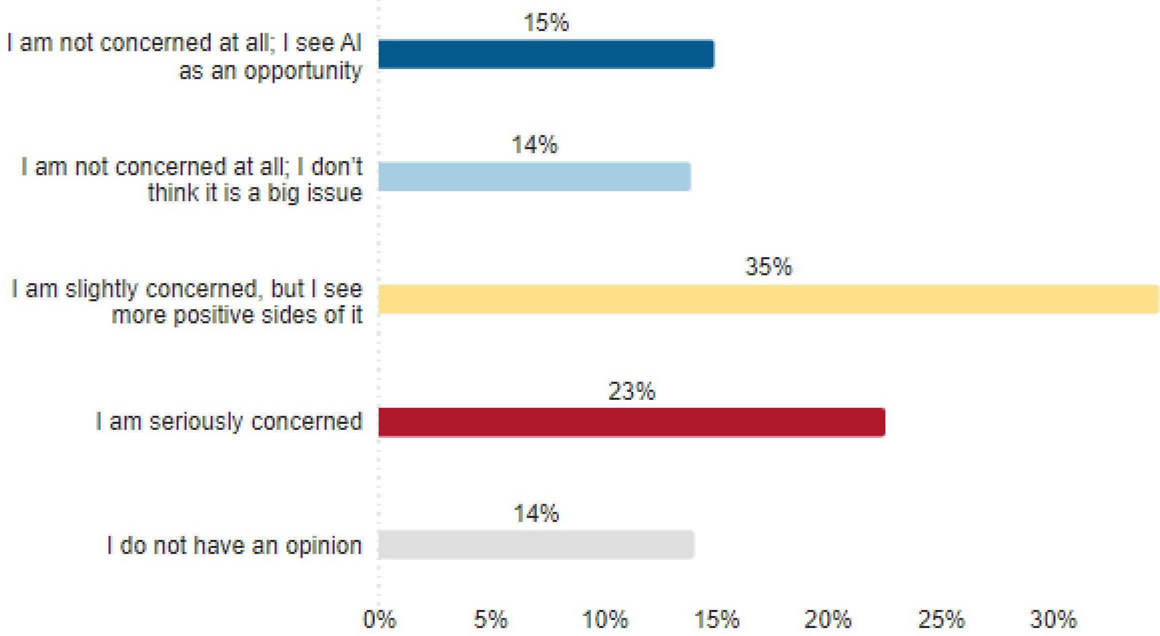
A majority of users have positive views **regarding the rise of AI-generated content**. A significant 29% are not concerned at all and 35% see more positive aspects of AI relative to negative sides. On the contrary, 23% are seriously concerned, and 14% have no opinion on the matter.

Attitudes towards AI show no correlation with gender, but age is an important factor. Younger respondents, particularly those aged 18-30 and 31-40, tend to view AI-generated content more positively. Among these groups, 39% and 34%, respectively, express no concerns, with an additional 38% and 34% seeing more benefits than drawbacks. Serious concerns are reported by only 14% of those aged 18-30 and 19% of those aged 31-40. However, concern increases progressively with age. Respondents over 60 show the highest levels of apprehension: only 19% express no concerns, while 34% are slightly concerned but still perceive more positives than negatives. In this group, 31% report being seriously concerned about AI-generated content.

Educational background also influences attitudes. Higher-educated individuals are more likely to have a positive outlook on AI, with 34% having no concerns at all and 38% seeing more positive sides, contrary to, respectively, 25% and 28% of lower-educated respondents. Additionally, lower-educated individuals are more likely to lack a clear opinion, with 23% selecting "I do not have an opinion", against 14% of the medium-educated and 7% of the higher-educated.

Interestingly, family dynamics and geography also shape these attitudes. **People without children are more likely to be concerned about AI** (24%), compared to those with children (18%). Moreover, **those living in rural areas are more likely to express concern** (26%) compared to their urban or suburban counterparts (22%).

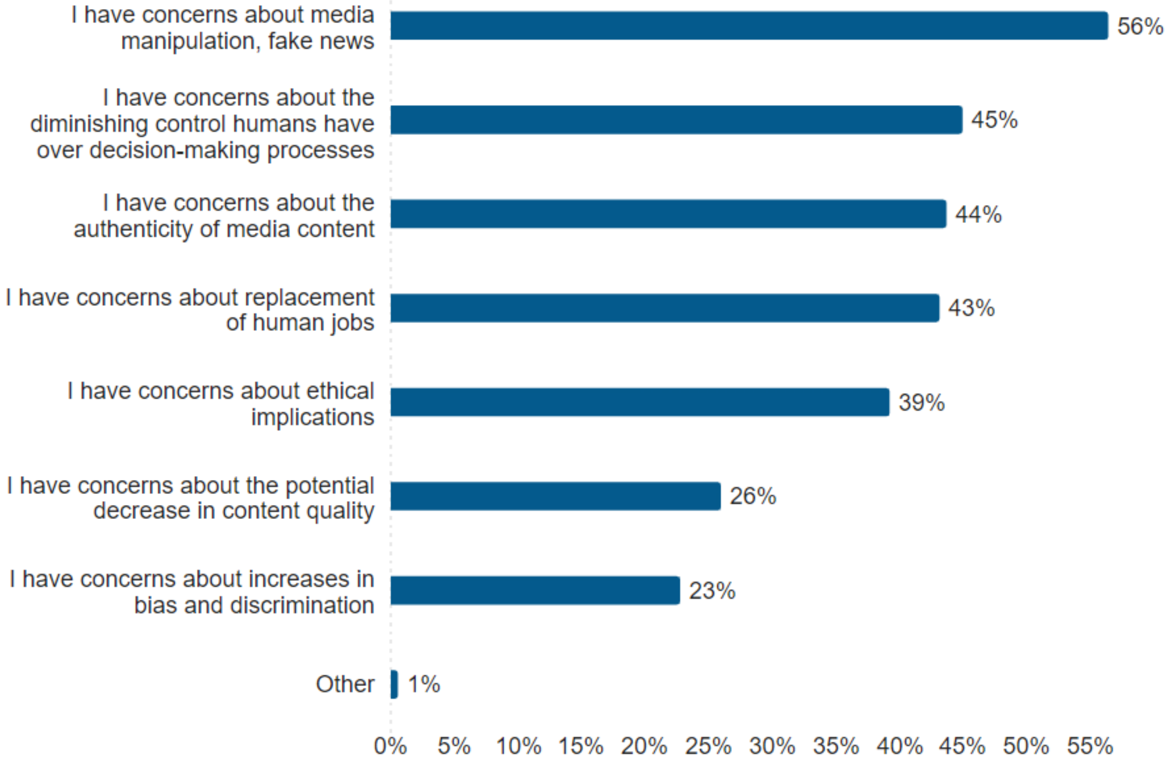
Question T18. How do you feel about the increasing presence of AI-generated content such as AI-generated articles, images, films etc.? (n=23,169)



Among those who expressed concerns, the main concern regarding AI-generated content is media manipulation and fake news, highlighted by 56% of respondents. Concerns about the diminishing control humans have over decision-making processes follow, with 45% of respondents. Then, concerns regarding the authenticity of media content and job replacement were each cited by 44% and 43% of respondents, respectively. Concerns about ethical implications, such as exploiting AI to produce harmful images, and the potential decrease in content quality were noted by 39% and 26% of participants, respectively. Other concerns include increased bias and discrimination, noted by 23%.[91]

[91] For question T11b, the analysis of open-text responses highlights several key concerns about the spread of AI-generated content. Common themes include fears of intellectual property theft, environmental impact, and the manipulation of elections or public opinion. Some respondents mentioned specific worries such as the use of AI for deepfakes, the loss of authenticity in human skills, and the potential for AI to replace human creativity. Others expressed apprehension about the social isolation and loss of critical thinking that could result from increased AI reliance. A few respondents referenced science fiction scenarios like "Skynet" and "Terminator" to illustrate fears of AI control or dominance.

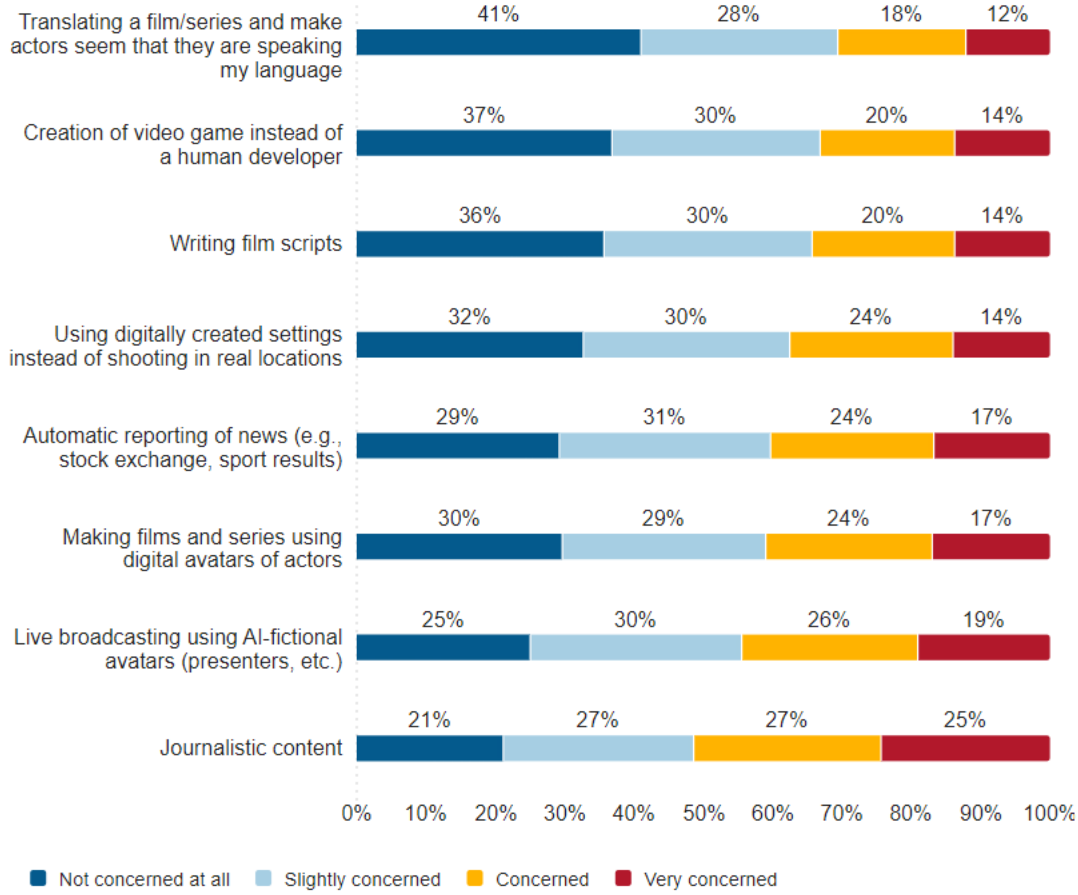
Question T19. Why are you concerned about the spread of AI-generated content in media? Please select all that apply. (n=13,102, 2.9 average clicks)[92]



Respondents expressed different levels of concern regarding AI's various uses in media. Concerns are most pronounced regarding the creation of journalistic content by AI instead of human developers, with 52% of respondents being concerned or very concerned. Live broadcasting using AI-fictional avatars also raised concerns for 45% of participants. Translating films or series making actors seem as if they are speaking in different languages and using AI to create a video instead of a human developer were the options raising fewer concerns, with, respectively, 30% and 34% of respondents being concerned or very concerned.

[92] Question asked only if answer "I am seriously concerned" or "I am slightly concerned" was selected in question T18.

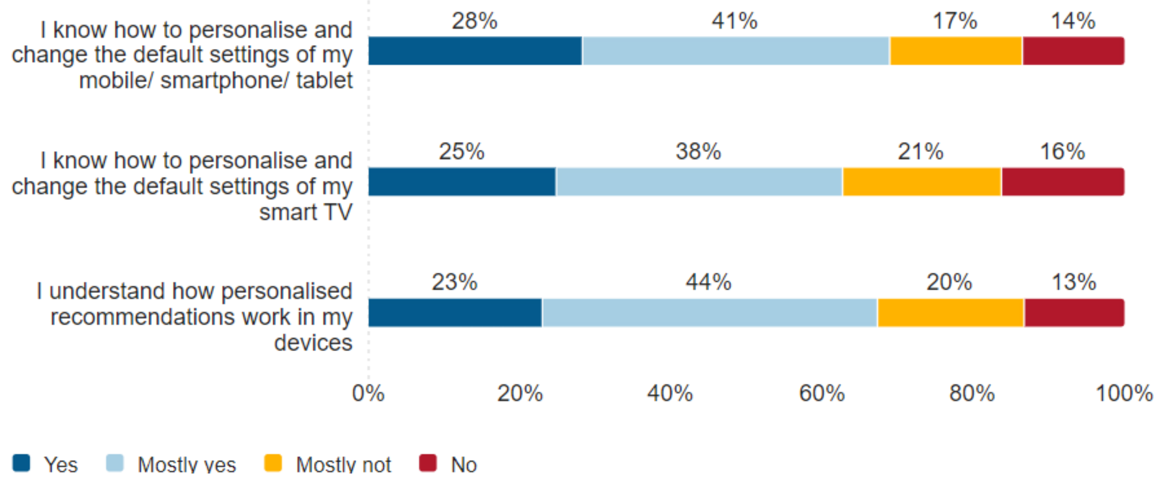
Question T20. How concerned are you about the various uses of AI in media? (n=23,169)



Smart TV

While a large portion of respondents mostly understand how personalised recommendations work on their devices, **just around a quarter of the sample is fully in control of the recommendations and default settings of their devices**. Among those who do not, the relative majority (37%) of respondents find it difficult to understand how to personalise and change the default settings on their smart TVs. However, only a small group of respondents expressed uncertainty or a lack of knowledge in these areas.

Question T21. Thinking about devices you use to watch films/play games/listen to music etc., would you say that: (n=23,169)



When it comes to changing settings and personalizing devices, **39% of respondents do not change settings on their mobile, laptop, or tablet** and **50% do not change settings on their smart TVs**.

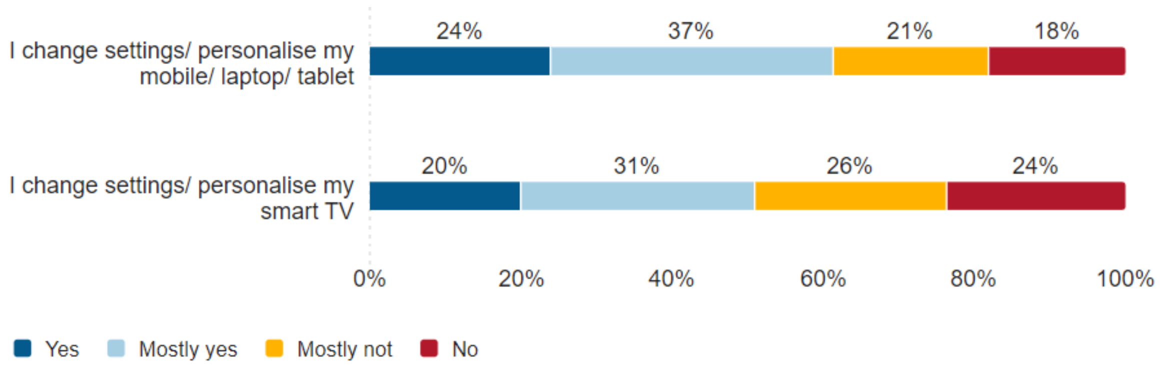
In terms of gender, women tend to customise settings slightly more than men for mobile, laptop, or tablet devices, with 62% of women making adjustments compared to 60% of men. However, for smart TVs, men are slightly more likely to personalise settings, with 53% doing so compared to 49% of women.

Age distribution reveals that younger consumers are more inclined to customise device settings compared to older age groups. For mobile, laptop, and tablet devices, the percentage of respondents who personalise settings decreases steadily with age: 74% among those aged 18-30, 75% for ages 31-40, 67% for ages 41-50, 58% for ages 51-60, and only 43% for those over 60. A similar trend is observed for smart TVs, where 59% of respondents aged 18-30 and 63% of those aged 31-40 adjust settings, compared to 58% in the 41-50 age group, 48% for ages 51-60, and just 34% for those over 60. Notably, the gap between younger and older respondents is slightly more pronounced for mobile, laptop, and tablet devices than for smart TVs.

Regarding education, 67% of those who have a higher education customise their mobile, laptop and tablet and 57% of them customise their smart TV, slightly higher than the, respectively, 54% and 41% of those with a lower education.

Family and income data showed some interesting insights. Those respondents with children are more likely to customise their smart TV (58%) compared to those without children (46%). Additionally, financial situation appears to influence the likelihood of customising smart TV settings, with respondents in better financial situations being more inclined to make adjustments. Specifically, 60% of those in a comfortable financial situation personalise their smart TV settings, compared to 49% of those able to meet their basic needs and only 47% of those experiencing financial difficulties.

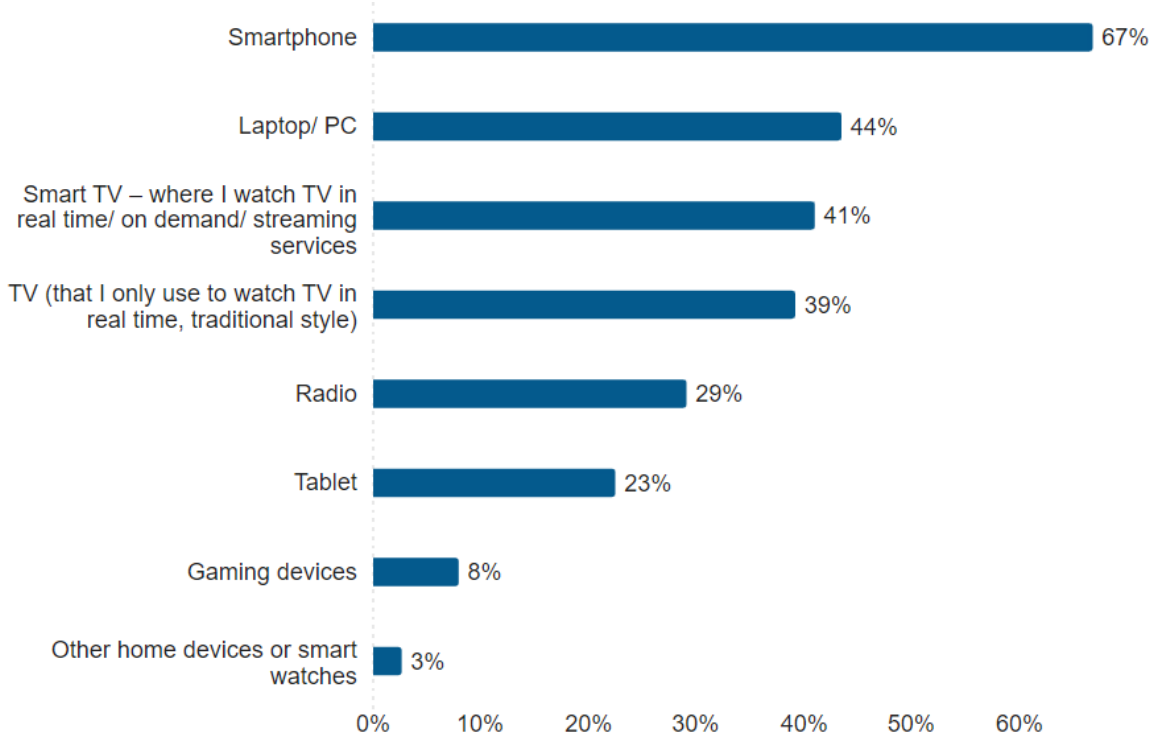
Question T22. Thinking about devices you use to watch films/play games/listen to music etc., would you say that: (n=23,169)



The most commonly used device for accessing news, music, or videos is TV. Overall, 71% of respondents reported using some form of TV (either traditional and/or smart TV) to access news, music, videos, or other media. This high level of TV usage underscores the central role of televisions as a preferred medium for media consumption among participants. Smart TVs are used by 41% of participants, while 39% use traditional TVs[93].

The TV devices are closely followed by the smartphone, with 67% of respondents using it. Laptops or PCs are also frequently used, with 44% of respondents indicating their preference. Radio is used by 29%, tablets by 23%, and gaming devices by 8% of respondents. Other home devices or smartwatches are used by a small percentage, 3%, of participants.

Question T23. Which devices are you normally using when accessing the news, listening to music, or watching videos/ series/ films? Please select all that apply. (n=23,169, 2.62 average clicks)[94]

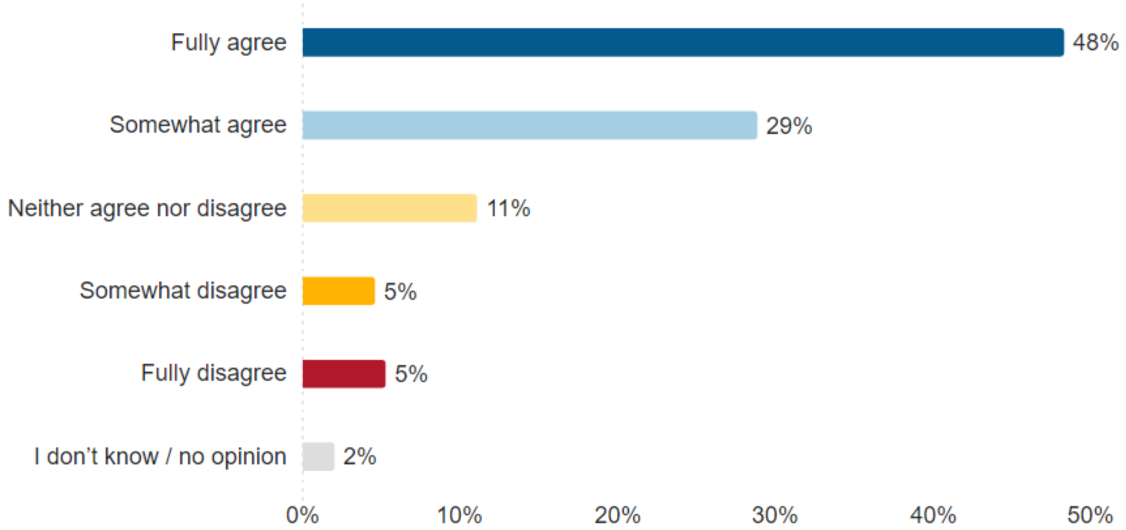


Among those who selected "Smart TV", the majority of respondents (77%) agree that they find it easy to locate TV channels and apps on their Smart TVs. However, **10% of respondents have some difficulty**, and 11% neither agree nor disagree.

[93] Specifically, approximately 30% of respondents indicated that they use only a Smart TV, while 28% use only a traditional TV. Additionally, 12% of respondents reported using both Smart TV and traditional TV. This overlap highlights that some users are engaging with both types of TV technology. To avoid double-counting, these groups were analysed separately and combined, resulting in a unique total of 71% for overall TV usage.

[94] Smart TV and TV are shown separately because these were separate survey options in the survey. However, in the description of the results they are grouped.

Question T24. How much do you agree with the following statement: "I find it easy to locate the TV channels and apps I want to access on my Smart TV"? (n=10,072)[95]

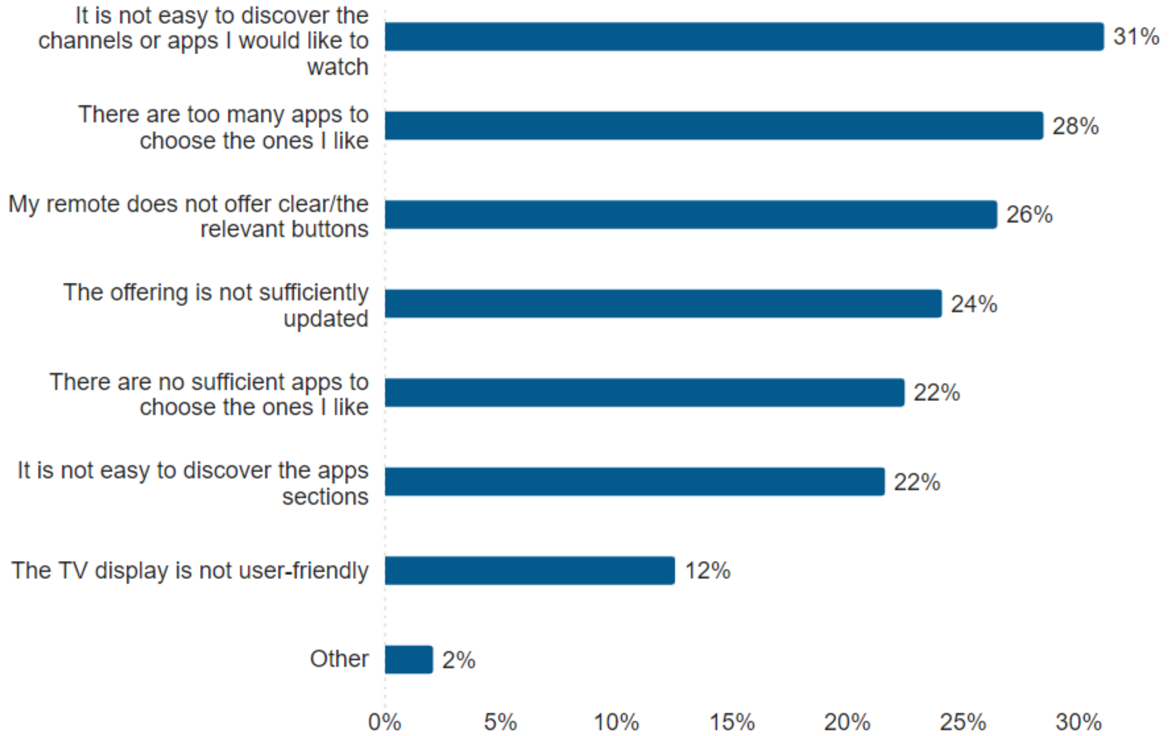


Among those who did not agree with the previous statement, **the primary challenges in locating TV channels and apps on Smart TVs include difficulty in discovering the channels or apps they would like to watch (31%) and the overwhelming number of apps available, making it hard to choose (28%)**. Other issues include the remote control not offering clear or relevant buttons (26%), the content offered on Smart TV not sufficiently updated (24%), not sufficient apps to choose from (22%), and app sections not easy to discover (22%). Another 12% mentioned that their TV display is not user-friendly.[96]

Question T25. You do not find it easy, or just to an extent, to locate the TV channels and apps you want to access on your smart TV. What is/are the

[95] Question asked only if answer "Smart TV" was selected in question T23.
[96] For question T15c, respondents who selected "Other" often indicated no issues with locating TV channels or apps on their smart TV, with many stating it is easy or straightforward. Some cited reasons such as getting used to a new TV, outdated technology (e.g., old smart TVs not supporting new apps), or slow service providers. A few mentioned the absence of channels from other countries or the lack of a search button for easier navigation.

reason(s) for this? Please select a maximum of 3 options. (n=983, 1.65 average clicks)[97]



2.5.2. Further assessment of results

Immersive experiences

Consumers' openness towards using VR and AR technology seems to reflect a broader enthusiasm for adopting new technologies, such as Smart TVs, AI, and gaming innovations.

For example, **individuals who have tried AR or VR are significantly more likely to use a VPN**, with 24% of AR/VR users doing so, compared to only 11% among those who haven't engaged with immersive tech. Similarly, **those who have experienced AR or VR tend to be less concerned about AI**—only 14% of AR/VR users express concerns about AI, whereas 26% of those who have not tried AR or VR are wary of it. It's a pattern of embracing emerging technologies with fewer reservations.

In terms of other tech adoption, **there's a positive link between AR/VR use and smart TVs**, with 48% of AR/VR users also owning smart TVs, compared to just 38% among non-users.

AR/VR enthusiasts tend to show larger consumption across various media sectors as well[98], particularly in categories like video games, sports, and reality TV. **Half of VR/AR users (50%) are engaged with video games weekly or daily**, compared to just 33% of non-AR/VR users. Likewise, **44% of those who use VR/AR watch sports every day or every week**, in contrast to 35% of non-users. **Reality TV also sees a higher rate of consumption**, with 40% of AR/VR users tuning in weekly or daily,

[97] Question asked only if answer "Fully disagree" or "Somewhat disagree" was selected in question T24.
[98] Question used for comparison: "In the last year, how often did you… [media categories]?" which is the very first question of the survey in the first block of questions.

compared to 27% of those who haven't explored immersive technologies. However, **news consumption appears to be lower among VR/AR users**, with 69% keeping up with the news every day or every week compared to 76% of non-users. This may suggest that immersive technologies might be shifting user attention away from news.

VPN consumption

In terms of media consumption habits, **those who regularly use VPNs tend to consume more of almost every type of media compared to non-VPN users**. For instance, they watch films 4 percentage points more often, reality TV 5 percentage points, sports 6 percentage points, play video games 10 percentage points more frequently, and listen to music 3 percentage points more than those who don't use VPNs. Interestingly, **when it comes to news and social media, VPN users and non-users consume these at similar rates**.

Advertisements don't seem to influence VPN usage either, as there is no notable difference between VPN and non-VPN users when it comes to using services that include ads. Lastly, when it comes to the types of films or series VPN users prefer, or whether they lean more towards European or non-European productions, no significant differences emerge between the two groups. Their tastes and choices in these areas remain largely indistinguishable from those who do not use VPNs. This might showcase that the use of VPN is not mainly motivated by the willingness to access content that is not available in consumers' countries.

Smart TV consumption

When asked about their ability to personalise their devices, 88% of those who customised their smart TVs responded "yes" or "mostly" to know how to personalise, compared to only 36% of non-customisers who gave the same response.

Smart TV users, particularly those who take the time to customise their settings, demonstrate a marked increase in their overall media consumption across various categories. These users seem to be more engaged with different forms of media compared to those who leave their TV settings as they are.

For instance, 71% of Smart TV users who personalise their settings regularly watch films (i.e., daily or weekly), in contrast to 63% of those who don't bother with customisation. The interest in sports is notably higher, with 42% of customisers regularly watching sports, compared to only 32% of non-customisers. When it comes to gaming, the difference is even more pronounced—44% of people who customise their Smart TV settings play video games daily or weekly, compared to just 31% among those who do not. This might indicate that personalised settings enhance satisfaction and therefore user engagement in video games. Social media usage also sees an uptick, with 83% of customisers using it regularly, compared to 76% of non-customisers.

The main reasons for consuming media also differ between these two groups. Those who customise their Smart TV settings are more likely to have a variety of motivations, including the desire for a more tailored viewing experience, but they are also likely more media-savvy and inclined towards maximising the features of their technology to suit their preferences. In contrast, the majority of non-customisers (55%) show more inclination toward not having a specific purpose when consuming media.

In terms of spending habits, **people who personalise their Smart TV settings tend to spend more across all media platforms**. In particular, they spend on average EUR 0.40 more for news, EUR 2.00 more for pay TV, EUR 4.00 more for basic TV and for bundle services, EUR 3.50 more for streaming, and EUR 2.50 more for video games. This suggests that customisers not only consume more media but are also willing to invest more money in their media experiences, likely driven by their desire for a more personalised, comprehensive media environment.

Media literacy and news

The results show that the perception of news varies depending on the level of media literacy. In this section, media literacy is defined as participants' understanding of how personalised recommendations work and their ability to customise and change default settings on devices, as measured through their responses to the relevant questions.

Individuals who believe that the news spread lies reported a lower understanding of recommendations on how to personalise their devices, with only 50% expressing a good level of comprehension. This contrasts with those holding a positive view of news, where between 60% - those reporting "news play a modest positive role for democracy and society" - and 68% - those reporting "news play a very positive role for democracy and society" - claimed a good understanding of recommendations on devices' customisation.

Furthermore, **those sceptical of news were also less prone to change default settings on mobile devices and smart TVs**. Specifically, 53% of individuals who thought news spreads lies were able to change mobile settings, and 49% could do so on their smart TVs. This is in contrast to those holding a positive view[99], where these percentages rose to 60% and 62% respectively, with the highest figures among those with a very positive view of news[100], reaching up to 68%.

Lastly, the primary source of news also correlates with the understanding of personalised recommendations and the ability to change settings.[101]

a) Respondents who consumed **news exclusively from professional outlets** showed low levels of understanding of personalised recommendations (53%) and the ability to alter settings on both mobile devices (53%) and smart TVs (47%).
b) **Those who primarily relied on professional outlets but also engaged with other sources reported higher figures**, with 59% understanding recommendations and over 60% changing settings on mobile devices and smart TVs.
c) **Those who consumed news equally from professional sources and social media or other platforms reported the highest understanding of**

[99] Reporting "News play a modest positive role for democracy and society"
[100] Reporting "News play a very positive role for democracy and society"
[101] The reported differences are based on statistical analysis of the relationship between news consumption sources and understanding or ability to personalize device settings. Analysis showed significant differences between groups:

- Understanding personalized recommendations: ANOVA $p < 0.001$, Effect size (Cohen's f) = 0.153.
- Mobile/smartphone/tablet settings: ANOVA $p < 0.001$, Effect size (Cohen's f) = 0.140.
- Smart TV settings: ANOVA $p < 0.001$, Effect size (Cohen's f) = 0.150.

Pairwise comparisons revealed that respondents who consumed news equally from professional outlets and social media consistently reported higher average scores across all categories (2.80, 2.87, and 2.74), indicating they leaned toward "Mostly yes" in understanding personalized recommendations and ability to personalize device settings. In contrast, those relying solely on social media exhibited the lowest scores (2.13, 2.23, and 2.04), closer to "Mostly not", reflecting much lower levels of understanding and ability.

personalised recommendations (71%) and greater control over settings on mobile devices (70%) and smart TVs (65%).

d) Interestingly, those who predominantly consumed news from social media and other non-professional sources reported somewhat lower, albeit still substantial, levels of understanding (62%) and ability to change settings (64% on mobile and 57% on smart TVs).

Finally, respondents who solely relied on social media and alternative platforms showed the lowest levels of comprehension**, with only 44% understanding personalised recommendations, and their ability to modify settings on mobile devices and smart TVs lagging at 48% and 37%, respectively.**

Table 3 Relationship between news consumption sources and understanding or ability to personalize devices

			QN8: WHERE DO YOU PRIMARILY GET YOUR NEWS?				
		Total	**Only professional outlets**	**Mostly professional outlets**	**Both professional outlets and social media and other platforms**	**Mostly social media and other platforms**	**Only social media and other platforms**
I understand how personalised recommendations work in my devices	**No**	18.8%	26.8%	15.7%	10.3%	12.7%	37.6%
	Mostly not	21.3%	19.8%	25.2%	19.1%	24.9%	18.4%
	Mostly yes	42.2%	35.2%	42.8%	50.9%	42.9%	37.0%
	Yes	17.7%	18.3%	16.3%	19.6%	19.5%	6.9%
I know how to personalise my device and change the default settings of my mobile/ smartphone/ tablet	**No**	20.0%	28.1%	17.7%	10.8%	15.3%	34.5%
	Mostly not	19.7%	19.3%	20.7%	19.3%	20.6%	17.4%
	Mostly yes	39.4%	35.2%	40.6%	41.8%	43.7%	38.5%
	Yes	21.0%	17.3%	21.0%	28.2%	20.3%	9.6%
I know how to personalise my device and change the default settings of my smart tv	**No**	23.7%	32.2%	19.1%	14.4%	21.5%	40.7%
	Mostly not	21.4%	21.3%	22.0%	20.8%	21.5%	22.6%
	Mostly yes	37.1%	33.4%	37.7%	41.4%	40.9%	28.3%
	Yes	17.8%	13.1%	21.2%	23.5%	16.1%	8.4%

Device preferences

The correlation between devices typically used and media expenditure reveals notable variations in spending patterns. Across all news sources, average monthly spending on news ranges modestly, between EUR 2 and EUR 4.8. In contrast, spending on pay TV shows greater discrepancies based on device preference. Participants using traditional TVs, tablets, smartphones, and radios spend between EUR 6.2 and EUR 6.7. PC users allocate about EUR 7 to pay TV, while smart TV users report the highest average spending at EUR 8.8.

Spending on basic TV subscriptions also varies significantly, with those selecting other home devices spending around EUR 11 per month, while all other groups report higher spending, ranging from EUR 18 to EUR 21**. Smart TV users again emerge as the highest spenders at EUR 21.** When it comes to bundled services, expenditures range from EUR 6 among other home devices, TV, and radio users, up to EUR 11 and EUR 12 among smart TV and tablet users. Spending on video games shows a clear progression, from EUR 10 among other home devices users to EUR 16 for tablet users, with smart TV, PC, and smartphone users falling in between.

In terms of media consumption, distinct patterns emerge based on the device used. For this analysis, frequent consumption is defined as respondents who reported consuming a given media "a few times a week" or "daily" in the past year. This approach allows us to focus on frequent and consistent media consumers and the devices they utilize.

a) **News Consumption:** Users of radio stand out as the most consistent consumers of news, with 84% accessing news regularly. Traditional TV users follow closely, with 82% consistently consuming news. Among digital devices, users of smart TVs (77%), laptops/PCs (76%), tablets (75%), and smartphones (74%) demonstrate similar levels of engagement. In contrast, gaming device users show slightly lower engagement, with 71%.
b) **Viewing of Films, Series, and Documentaries:** Among the most consistent viewers, users of smart TVs lead with 74% engaging frequently. Tablets and laptops/PCs users follow closely, each with 72% of their users engaging frequently, reflecting their role in on-demand streaming. Traditional TV and radio and gaming devices users also show strong engagement, with around 70% of users frequently watching films and series.
c) **Watching Reality Shows and Other Entertainment Programs:** Users of gaming devices lead in frequent viewing of reality shows and similar entertainment content, with 40% engaging regularly. This is followed by users of smart TVs (35%) and laptops/PCs (32%). Traditional TVs and tablets show similar levels of consistent engagement at 31% each, while smartphone users lag slightly at 29%.
d) **Watching Sports:** Users of gaming devices are the most consistent viewers of sports, with 55% engaging frequently. This is followed closely by users of tablets (45%), traditional TVs and smart TVs (both 42%), and radio (42%), all showing moderate levels of engagement. Smartphone and laptop/PC users demonstrate slightly lower consistent viewership, with 38% and 40%, respectively, engaging frequently.
e) **Playing Video Games**: Users of gaming devices emerge as the most consistent gamers, with 73% engaging frequently, including 49% who play daily. Tablet users follow closely with 47% of users playing games frequently, reflecting their portability and ease of use for casual gaming. Smartphones also see strong engagement, with 41% of users playing frequently, highlighting their role as a convenient platform for mobile games. Smart TVs and laptops/PCs users show moderate levels of consistent gaming, each with 42% of users playing regularly. Traditional TVs (37%) and radios (35%) users exhibit the lowest engagement for gaming.
f) **Using Social Media**: Users of smartphones are the most consistent social media users, with 86% engaging frequently, including 73% accessing daily. Tablets and gaming devices follow closely, each with 84% of users engaging frequently. Smart TVs and laptops/PCs also show strong consistent usage, each with 82% of users frequently accessing social media platforms. Traditional TVs and radios exhibit slightly lower engagement, with 77% of users in both categories engaging frequently.
g) **Listening to Music**: Among the most consistent listeners, radio users lead with 84% engaging frequently. Gaming devices users follow closely at 81%, and smartphones and tablets users also show high levels of engagement, with 80% and 79% of users, respectively, frequently listening to music. Smart TVs and

laptops/PCs exhibit similarly strong usage (79% and 78%, respectively). Traditional TVs show slightly lower, but still significant, engagement at 72%.

The results show a strong **relationship between device preferences to access media content and the reliance on different types of news sources** (either professional outlets or social media and other platforms). The results demonstrate a clear division between traditional media, which is largely associated with professional outlets, and digital platforms, where social media and informal sources play a more dominant role.

The majority of respondents who consume news via **TV on air (59%)**, **radio on air (62%)**, and **printed press (69%)** prefer professional outlets, either exclusively or predominantly. These traditional media formats show the highest inclination towards professional content, with a strong focus on news from established, traditional sources.

For digital platforms, **news websites/apps (51%)** and **email newsletters (48%)** also demonstrate a significant preference for professional outlets, although the percentage is slightly lower than for traditional media. Similarly, **TV online (on-demand, web, etc.) (50%)** also sees a notable share of users who lean predominantly toward professional news outlets.

On the other hand, respondents who consume news via **social media (e.g., Facebook, Instagram, X, etc.) (28%)** and **messaging apps (e.g., WhatsApp, Telegram) (31%)** show a strong tendency towards social media and other informal news sources. **YouTube or other video websites (e.g., Vimeo, Twitch)** also exhibit a comparable trend, with 26% of users primarily relying on social media.

Finally, users who expressed indifference or lack of preference for specific sources (**I don't know / I am indifferent (50%)**) lean towards social media platforms, with a lower percentage preferring professional outlets.

The table below provides the full results.

Preferred Source of News	Only from Professional Outlets	Mostly from Professional Outlets	Both from Professional Outlets and Social Media/Other Platforms	Mostly from Social Media/Other Platforms	Only from Social Media/Other Platforms
TV (on air, cable)	33%	26%	29%	9%	2%
TV online (on-demand, web)	23%	27%	36%	10%	4%
Printed press	36%	33%	24%	7%	1%
Radio (on air)	33%	29%	27%	9%	2%
Radio (on-demand, podcasts)	25%	27%	34%	11%	4%
News websites and/or apps	24%	27%	35%	11%	3%
Social media	13%	17%	41%	22%	6%
Messaging apps	11%	20%	44%	21%	5%
Email newsletters	24%	24%	37%	11%	3%
YouTube or other video websites	14%	18%	41%	20%	6%
I don't know / I am indifferent	28%	13%	26%	11%	22%
Other	27%	14%	23%	9%	28%

AI and media consumption

The attitudes towards artificial intelligence (AI) among different segments of consumers reveal several distinct patterns. In particular, media consumption habits correlate with these attitudes. **People who are concerned about AI tend to follow the news more closely**—78% of those with concerns regularly watch the news (i.e., daily or weekly), compared to 73% of those without concerns. However**, those who express AI concerns generally consume less entertainment media**. For example, only 23% of people with AI concerns watch reality TV daily or weekly, compared to 33% of those who are not worried about AI. Similarly, AI-worried individuals engage less with sports (34% vs 38%), video games (31% vs 40%), and social media (75% vs 80%).

3. Media consumption profiles

3.1. Young people

3.1.1. Overall consumption trends

Respondents aged 18-30 constituted 26% of the total sample. Comparisons between the responses of the 18-30 age group and the overall average reflect the fact that the average includes the contributions of this group. Consequently, if the responses from the 18-30 age group are above or below the overall average, it indicates that the responses from the 30+ age group differ correspondingly in the opposite direction to balance the average.

When analysing how individuals aged 18 to 30 engage with various media activities, several notable differences emerge compared to the average population. This age group consumes certain media more than the overall population, like social media, music, films, series and documentaries, and video games. In contrast, they follow news much less frequently than the overall population. Finally, sports and reality shows or other entertainment programmes are watched with the same intensity as the overall population.

- Like the overall population, **social media is the most dominant activity.** However, for this age group, **daily use (75%) is significantly higher** than the 66% observed in the general population. Very few in this group use social media monthly or not at all (5% - aggregated for both answer options), compared to 10% of the average population.
- **Listening to music is the second most frequent activity of young consumers**, with 64% engaging daily compared to 52% of the overall population. **Watching films, series, or documentaries is another regular activity**, with 32% reporting daily engagement, just under the 36% in the broader population.
- **Only 31% of this age group engage daily with news**, a stark contrast with the 53% in the average population. Instead, a larger proportion of individuals aged 18-30 access news a few times a week (27%) or weekly (20%), suggesting less frequent interaction with news content compared to older groups.
- **Playing video games is a comparatively more frequent activity,** with 30% of 18-30 year-olds playing daily and 43% playing once or several times a week, higher than respectively 26% and 36% of the general population. Moreover, 11% report never playing video games, a figure that is much lower than the 25% seen in the wider population.
- **Reality shows or other entertainment programmes are watched daily by 13% of this age group**, which is slightly above the 11% in the general population.
- **Sports viewing is the least frequent activity in this age group**. Among people aged 18-31, only 12% watch sports daily and 21% more than once a week, compared to 13% and 25% in the broader population.

Social media is the most dominant activity among the youngest age group, with 45% of 18-30-year-olds ranking it first, but its popularity declines with age, dropping to only 24% among those aged 31 and older.

3.1.2. Audiovisual consumption trends

TV, streaming and cinema services

Individuals aged 18–30 engage with audiovisual services to watch films, series, news, or other programmes differently compared to the average population. Overall, subscription streaming services dominate media habits among this age group, with traditional TV and its online counterparts seeing far less frequent engagement. These patterns underline the generational shift towards on-demand, digital-first viewing and away from traditional broadcasting methods. Yet, cinema attendance, while limited, is slightly more common among younger people than the average population.

- **Subscription streaming services are popular among the youngest consumers**. 31% of young consumers report using them at least once a day and 31% at least once a week, significantly higher than the general population (25% each). Only 11% never or almost never use streaming services, compared to a significant 27% in the broader population.
- **Traditional/linear TV sees less frequent use among people aged 18-30**, while it is the most frequent for the average population. Only 15% watch it daily, compared to a much higher 32% of the general population. A significant portion (21%) reports almost never or never using this service, compared to only 15% of the overall population.
- **Online services provided by traditional TV channels are also less popular with this age group, which reflects the average trend among all age groups**. Only 15% use them daily, and 23% weekly, slightly less than the broad population (respectively, 18% and 23%). A large proportion (20%) report never or almost never engaging with these services, compared to 26% of the average population.
- **Cinema attendance among younger people shows moderate engagement**, with 18% declaring attending at least once a day or a week. Monthly or less frequent attendance accounts for 62%, which is higher than the average (49%) trend. 16% of them never or almost never go to the cinema, which is much lower than the 32% in the general population.

When deciding to subscribe to a new video streaming service, for individuals aged 18-30, the most important factors are the selection of films/series (263) and attractive price/promotions (101). They also place relatively high importance on whether friends or family have a subscription (67) compared to other factors.

For the older individuals (31+), the selection of films/series (197) remains the top priority, but attractive price/promotions (155) is relatively more significant compared to the younger group. Additionally, inclusion in a TV/internet package (98) is a more important factor for this age group than for the younger audience.

Overall, while both groups prioritize content selection and pricing, younger respondents are more influenced by social factors (friends/family subscriptions), whereas older respondents place higher importance on bundled services with TV or internet.

Question A10. Relative importance of the reasons to subscribe to a new video streaming service among age groups.

Feature	Relative importance (18-30)
Selection of films/series	263
Attractive price/promotion	101
My friends/family have a subscription	67
Selection of sports events	59
Selection of other content (e.g., cooking, talent, dating shows)	55
Included in my TV/internet package	55

Feature	Relative importance (31+)
Selection of films/series	197
Attractive price/promotion	155
Included in my TV/internet package	98
Selection of sports events	63
My friends/family have a subscription	44
Selection of other content (e.g., cooking, talent, dating shows)	43

When comparing the factors influencing film and series choices between people aged 18-30 and 31+, for both age groups, the genre is the most important factor. The storyline, dialogue, and characters are also crucial for both, but they matter more to younger viewers.

Younger respondents place more importance on whether the film or series belongs to a franchise they like (124) and if they have heard about it online or in the media (100). Meanwhile, older respondents place a higher priority on the main actors/ actresses/ filmmakers (102) and the main language spoken in the film/series (97).

Question A13. Relative importance of the factors that help decide what film or series to watch.

Feature	Relative importance (18-30)
The genre, e.g. crime, comedy, adventure, sci-fi, horror	210
The storyline, dialogue and characters	181
The film or series is part of a franchise I like (e.g. prequel, sequel, spin-off) or is a new season of a TV show I like	124
I hear/read a lot about the films/series online, on TV, in the news etc.	100
The main language spoken in the film or series	82
High quality special effects, music, visual impact	79
The main actors/actresses/filmmakers	75
The film or series is a new release	73
It is based on a book or video game I like	65
High artistic value	59
Where in the world the film or series is set	51

Feature	Relative importance (31+)
The genre, e.g. crime, comedy, adventure, sci-fi, horror	267
The storyline, dialogue and characters	149
The main actors/actresses/filmmakers	102
The main language spoken in the film or series	97
The film or series is part of a franchise I like (e.g. prequel, sequel, spin-off) or is a new season of a TV show I like	92
The film or series is a new release	84
High artistic value	69
High quality special effects, music, visual impact	63
I hear/read a lot about the films/series online, on TV, in the news etc.	62
It is based on a book or video game I like	60
Where in the world the film or series is set	55

When comparing the preferred information sources for choosing films and series between respondents aged 18-30 and 31+, for the younger group (18-30), streaming services (178) and social media (162) are the most important sources of information, followed by friends/family recommendations (143) and search engines/databases (140). They also place more importance on official social media accounts of filmmakers and cast (117) than older viewers.

For the older group (31+), traditional TV and radio (166) and friends/family recommendations (164) are the top sources, with streaming services (163) also ranking high. They rely more on newspapers/magazines (94) compared to younger respondents and place less emphasis on social media (80) and official social media accounts (70).

Question A14. Relative importance of the main information sources to help choose which films and series to watch.

Feature	Relative importance (18-30)
Streaming services I use (e.g. featured films on homepage, recommendation, trending contents etc)	178
Social media – e.g. influencers, chat, comments, trailers	162
Friends/family recommendations	143
Search engines (e.g., Google, Bing), databases (IMDB, Rotten Tomatoes etc), Streaming Guides (Justwatch, Reelgood)	140
Official social media accounts/websites of cast, filmmaker or film/series	117
Traditional TV and radio: talk shows, trailers, news, interviews with cast	83
Film or TV blogs or podcasts	61
Newspapers/magazines (online and print): critics' reviews, interviews	51
Film festivals	50
Other	15

Feature	Relative importance (31+)
Traditional TV and radio: talk shows, trailers, news, interviews with cast	166
Friends/family recommendations	164
Streaming services I use (e.g. featured films on homepage, recommendation, trending contents etc)	163
Search engines (e.g., Google, Bing), databases (IMDB, Rotten Tomatoes etc), Streaming Guides (Justwatch, Reelgood)	138
Newspapers/magazines (online and print): critics' reviews, interviews	94
Social media – e.g. influencers, chat, comments, trailers	80
Official social media accounts/websites of cast, filmmaker or film/series	70
Film or TV blogs or podcasts	49
Film festivals	44
Other	31

When comparing the types of programs most and least watched at home via TV or streaming between respondents aged 18-30 and 31+, for the younger group (18-30), series with longer episodes and limited seasons (265) are the most popular, followed by films (186) and other shows like game shows, reality TV, and variety shows (125). They show less interest in news and current affairs (62), sitcoms (55), documentaries (49), and soap operas (39).

For the older group (31+), films (241) are the most watched, followed by series (203) and news/current affairs programs (104), which are significantly more important for this age group than for younger viewers. Documentaries (82) and sport (98) are also more popular among older viewers. However, they show less interest in sitcoms (32), stand-up comedy (22), and reality TV (77) compared to the younger audience.

Question A17. Relative importance of type of programmes whatched at home on TV or streaming.

Feature	Relative importance (18-30)
Series (with longer episodes and a limited number of episodes each season)	265
Films	186
Other shows, like game shows, reality TV (like cooking, dating, celebrities) or variety shows (like talk shows, singing/dancing)	125
Sport	73
News and current affairs programmes	62
Sitcoms	55
Documentaries	49
Stand-up comedy	45
Soap operas	39

Feature	Relative importance (31+)
Films	241
Series (with longer episodes and a limited number of episodes each season)	203
News and current affairs programmes	104
Sport	98
Documentaries	82
Other shows, like game shows, reality TV (like cooking, dating, celebrities) or variety shows (like talk shows, singing/dancing)	77
Soap operas	41
Sitcoms	32
Stand-up comedy	22

Streaming services advertisement preferences

Beyond subscription streaming services, **people aged 18-30 are also more likely to engage with ad-supported streaming services than the general population**. These patterns highlight the importance of cost-effective and flexible viewing options for this demographic, as well as possibly their greater acceptance of advertisements as part of the streaming experience.

While the 18-30 age group reports using only free streaming services with advertisements to the same extent as the general population (38% vs. 36%), **only 28% of them report not using ad-supported streaming services at all, compared to 40% in the general population**.

Additionally, **33% of respondents in this age group choose cheaper versions of subscription streaming services that include advertisements**. This is higher than the 25% of the broader population, indicating that affordability plays a key role in media consumption choices for younger demographics.

Country of origin preferences

Overall, young consumers watch international content more often compared to the overall population, regardless of the region or country of origin. Content from the United States is the most popular among the youngest demographic, with 60% watching it often or very often. This is higher than the 55% in the general population. A similar pattern is observed with British content (38% vs 33%), content from other European countries outside their home country and the UK (38% vs 34%), Asian content (24% vs 17%), as well as content from Latin America and Africa (24% vs 18%).

In contrast, films and series from their own country ("domestic content") are watched significantly less by individuals aged 18-30 compared to the overall population. 39% of this age group watch this content often or very often, compared to 48% reported in the general population.

Such difference is observed also when respondents were asked whether they would like to see more content from their own country or from another country. 30% of people aged 18-30 express a desire for more content from their own country, which is slightly lower than the 35% seen in the general population. While the desire for content from the UK or from other European countries shows a similar level among young consumers and the overall population, there is more interest in US content (26% vs 22%), Asian content (9% vs 5%) and content from Latin America and Africa (5% vs 3%).

3.1.3. News consumption trends

Preferred sources of news

Comparing the preferred sources of news for individuals aged 18–30 to the general population reveals clear differences in how news is consumed.

For younger audiences, social media is the dominant source of news, with 57% selecting platforms like Facebook, Instagram, and X as their preferred source. This figure is significantly higher than the 33% observed in the general population, highlighting the central role of social media in news consumption for this demographic[102].

[102] The specific questioni is: "What are your preferred sources of news?" and participants could select maximum 3 options.

Traditional television, which is the most popular source of news for the general population at 51%, is less favoured by younger respondents, with only 34% listing it among their top three sources. This reflects a shift away from traditional media among younger viewers.

YouTube and other video platforms are a major source of news for the 18-30 age group, with 33% selecting them, compared to only 19% in the general population. This suggests that younger audiences are drawn to video-based and on-demand formats for news consumption.

Digital news websites and apps are similarly important, with 31% of young respondents listing them as a preferred source. This is consistent with the 30% reported by the general population.

TV on-demand and web-based services are selected by 17% of younger respondents, lower than live TV but reflecting some continued interest in this format. **Radio, both on air and on-demand, is less prominent among this age group**, with only 16% and 10% respectively citing it as a preferred source, compared to 30% and 9% in the general population.

Messaging apps like WhatsApp or Telegram are similarly niche, with 16% of young respondents using them for news, compared to only 11% of the general population.

Email newsletters and printed press are even less popular among young respondents, with only 8% selecting each. This is a stark contrast to older demographics, where print media retains a slightly larger share of attention (17%).

The role of professional journalism

Only 34% of young respondents rely mostly or exclusively on professional outlets for their news, compared to 50% of the general population. **In contrast, 31% of them primarily rely on social media and other platforms for their news,** compared to just 18% in the general population. **The majority of young people (36%) state that they access news from both professional outlets and social media or other platforms**, slightly higher than 32% of the general population.

The value of User generated content (UGC)

In line with the preferences of the broad population, traditional media ranks better in terms of professionalism, reliability and accuracy. However, **for people aged 18-30, user-generated content scores better in terms of usefulness, efficiency, entertainment and accessibility** (respectively, 40%, 42%, 52% and 52%, against 28%, 28%, 35% and 37% of the general population). Only around 15% of young respondents rated traditional media more entertaining and accessible. The remaining respondents reported they are the same.

Consumption and value

Despite the changes in news consumption among people aged 18-30, the most important factors in selecting news are similar to those identified by the overall population. In fact, the most significant factor remains "trustworthiness, independence, and transparency", cited by 47% of respondents. This indicates that also young people value credibility and unbiased reporting when choosing where to get their news. The second most important factor is price, as 44% of young respondents reported they select news because they are for free.

Sources of trust

Interestingly, despite the change in news consumption habits, **public TV and digital news platforms remain the most trusted sources of news among the 18-30 age group**. In line with the overall population, 18% of young respondents indicated the former as the most trusted source, while 12% indicated the latter.

Online social networks and people, groups, or friends followed on social media are equally trusted by 11% each, slightly higher than the average results (respectively, 7% and 8%). Moreover, **public radio and mobile social apps (such as WhatsApp or Telegram)** are considered the most trusted source by, respectively, **9% and 10% of young respondents**. Public radio results are in line with the average (10%), retaining some credibility due to its traditional association with neutrality. In contrast, the average population ranks mobile social apps lower at 6%, reflecting the shift towards informal, direct communication platforms for news.

While the level of trust for printed press and private radio is slightly lower, there are no significant differences for the other sources of news, such as public radio, private TV and influencers.

Evolution of expenditure

The 18-30 age group's spending patterns do not differ substantially from the overall population. A notable 28% of young respondents state that their expenditure on information has increased. This is slightly higher than the 22% of the general population who report increased spending, suggesting a greater inclination among younger individuals to invest more in news and information services. Conversely, 19% of young respondents say their spending has decreased (compared to 14% in the overall population). Finally, 14% of young respondents indicate that they do not spend money on information at all, comparable to 17% in the general population.

3.1.4. Video games consumption trends

Video game consumption preferences

Surprisingly, when considering people reporting to play video games, **young respondents do not spend much more time playing video games compared to the overall population**. For instance, 16% of them report playing daily for more than 2 hours compared to 15% among the general population and 22% reported playing daily for less than 2 hours compared to 23% of the general population. 33% of young respondents reported playing every week but not daily, similarly to 34% of the overall population.

However, **preferences for video game format of young people are slightly different compared to the overall population.** With the exception of mobile games with 62% of people aged 18-30 playing regularly (the same share of the overall population), **all other formats are played more by them.** Online games played live on a PC or laptop rank second among this age group, with 36% regularly playing such games (compared to 27% overall). Console games (e.g., Xbox, PlayStation) are played by 34% of young respondents compared to 27% in the general population. Portable console games (e.g., Nintendo Switch, Steam Deck) are played regularly by 19% of the 18-30 age group, which is higher than the 14% in the general population. Finally, VR games with a headset are played by 8% of individuals aged 18-30, which is still slightly higher than the 7% observed in the general population. Altogether, it appears young players play a more diverse set of devices, but without increasing their playtime.

When it comes to the preference over the origin of games, there are no strong differences between the people aged 18-30 and the overall population.

Video games expenditure

Overall, **the 18-30 age group is more likely than the general population to spend money on video games**. **44% of young respondents report having spent money on video games within the last six months.** This is significantly higher than the 35% of the general population who made such expenses. However, free and freemium gaming models still maintain a strong presence among younger audiences, although to a slightly lesser extent than in the broader population: 41% of young respondents (vs 50% of the overall population) state that they only play free or freemium games and did not spend money on video games during this period.

16% of young respondents indicate that they only play games they purchased more than six months ago without making additional purchases, which is similar to the 15% reported in the general population.

3.1.5. Technology and innovation trends

Virtual and Augmented Reality

Younger people are significantly more likely than the general population to have experienced VR, AR, or both technologies. In fact, among young respondents, only 47% report not having tried either VR or AR, compared to 71% in the general population. More specifically, 33% of individuals aged 18-30 have tried VR, 7% have tried AR alone (that they are aware of), and 13% have tried both VR and AR (17%, 8% and 4% respectively among the general population).

People aged 18-30 are also **significantly more interested in using AR/VR for all different applications**. The greatest interest lies in the application of AR/VR for gaming, as 45% of this age group express interest (only 24% of the general population). **Only 20% of young respondents indicate no particular interest in using AR/VR, a stark contrast to the 38% of the general population.** This highlights a much higher level of curiosity and enthusiasm for immersive technologies among younger individuals.

Device Customisation

The 18-30 age group is more tech-savvy when it comes to managing the Smart TV or other devices' settings.

For mobile/smartphone/tablet settings, 75% of young respondents confidently state they know how to personalise and change the default settings. In comparison, the general population shows lower confidence, with 69% in control. Regarding smart TVs, **67% of young respondents claim to have knowledge of how to personalise and change default settings**. This is higher than the general population (63%).

For personalised recommendations, 27% of young respondents fully understand how those work and 43% 'mostly understand'. Their grasp is slightly stronger than in the general population, where this understanding is typically less widespread (respectively, 23% and 44%).

3.2. Low-income individuals

3.2.1. Overall consumption trends

Respondents categorised as low-income accounted for 27% of the total sample. Comparisons between the low-income group's responses and the overall average should be interpreted with the understanding that the average also incorporates their responses. As such, any significant deviation of the low-income group's responses from the average implies an opposing trend among the higher-income groups to maintain the overall balance. **The media engagement habits of individuals in uncomfortable financial situations** (also referred to as low-income individuals) **closely align with those of the overall population**, showing no significant differences.

Like the general population, social media is the most dominant activity for the low-income group. Daily use is equal to the 66% observed in the general population. Listening to music is the second most frequent activity, with 72% engaging either daily or a few times a week (76% in the general population). 48% of this group engages daily with news, which is slightly lower but comparable to the 53% in the overall population.

The other media activities show a similar trend between the two groups. However, a slightly **larger share of low-income individuals never engages in some media activities at all compared to the average population.** First, 28% of low-income individuals report never playing video games, a figure that is higher than the 25% seen in the wider population. Second, 30% of low-income individuals never watch sports, which is higher than the 25% observed in the general population. Third, 31% never watch reality shows or other entertainment programmes, a figure higher than the 25% of the average population.

3.2.2. Audiovisual consumption trends

TV, streaming and cinema services

Low-income individuals have similar consumption patterns compared to the overall population. However, as observed above, a larger share of low-income individuals never engages in some media activities, including the consumption of most AV content.

For instance, traditional TV is the most-watched also among low-income individuals, with a share of 30% watching it daily (32% among the general population). Subscription-based streaming services are the second, as they are watched daily by 25% of low-income individuals (25% of the general population), while 19% watch it at least once a week (vs 25%).

However, **the share of low-income individuals who never watched AV content is higher**. For instance, 19% report almost never or never watching traditional TV, compared to 15% of the overall population. A large chunk (31%) never or almost never uses streaming services, compared to 27% in the broader population. Cinema attendance shows also a significant difference, as 39% of low-income individuals never or almost never go to the cinema, which is significantly higher than the 32% in the general population.

Streaming services advertisement preferences

Among low-income individuals, 36% report using only free streaming services with advertisements, equal to the general population. Additionally, 23% of respondents in this group choose cheaper versions of subscription streaming services that include advertisements. This is slightly lower than the 25% of the broader population. In contrast, 41% of low-income people report not using ad-supported streaming services at all, compared to 40% in the general population.

Country of origin preferences

Low-income individuals tend to watch less domestic and international content than the general population. For instance, while US content is still the most popular, the share of low-income individuals reporting watching this content often or very often (49%) is lower compared to the overall population (55%). This difference is repeated for all categories: own country (43% vs 48%), British content (27% vs 33%), European content (30% vs 34%), Latin America and Africa content (15% vs 18%).

In terms of the desire for more AV content from different countries, the preferences of low-income individuals closely align with the ones of the general population.

3.2.3. News consumption trends

Preferred sources of news

The consumption preferences of low-income individuals closely mirror those of the overall population. TV remains the most popular source of news, with 51% selecting it as one of their top three sources (same share of the overall population), and social media as the second most popular one (32% vs 33%).

The only differences are observed with news websites and apps, which are preferred by 26% of lower-income respondents, slightly lower than the 30% observed in the general population, and with the **printed press** (15% vs 17%).

The role of professional journalism

The share of low-income individuals (46%) relying exclusively or mostly on professional outlets is slightly lower than the overall population (50%), and there is a significant **increase of individuals from the low-income group that primarily get their news from social media and other platforms** (22% vs 18%).

Among low-income individuals, views on traditional media content align with the broader population's preferences, as they value these media for their professionalism, reliability, accuracy, usefulness, and efficiency. In areas like entertainment and accessibility, user-generated content (UGC) scores slightly lower, with 31% and 32% of low-income individuals rating UGC positively in these aspects, compared to 35% and 37% of the general population.

Consumption and value

Only a few differences between low-income individuals and the general population can be observed when it comes to the values attached to news sources. While the most significant factors remain "trustworthiness, independence, transparency", selected by 53 of respondents (similarly to the general population, 54%), **free access is considered much more important for low-income individuals compared to the overall population** (51% vs 45%). The other factors, such as unique information and political alignment, are very much aligned with the overall population.

Sources of trust

Low-income individuals and the overall population share a similar level of trust in news sources. Public TV remains the most trusted news source, with 25% of respondents indicating it as their top choice, followed by a mix of digital and traditional sources. **The only difference is observed with social networks, as the level of trust is slightly higher among low-income individuals** (10% vs 7%).

Evolution of expenditure

19% of low-income respondents state that their expenses **on information have increased**, either slightly (12%) or significantly (7%). This is slightly lower than the 22% of the general population who report increased spending. Conversely, **17% of low-income respondents say their spending has decreased**, with 10% indicating a slight decrease and 7% reporting a significant reduction. This is higher with respect to the 14% of the general population who report decreased expenditure.

A significant 22% of low-income respondents indicate that they do not spend money on information at all (question N19), which is higher than the 17% in the general population.

3.2.4. Video games consumption trends

Video game consumption preferences

Low-income individuals and the general population share similar gaming habits, as in both groups 37-38% engage in daily gaming. Those who play less frequently, are slightly more prevalent among low-income individuals (31%) compared to the general population (28%).

With minor variations, preferences for video game formats among low-income individuals are in line with the average population. Mobile games on smartphones or tablets are the most commonly played format, showing an even higher share of respondents regularly playing (67%) compared to the overall population (62%). On the contrary, console games, online games, and portable console games are played less frequently among low-income individuals (24% vs 27%, 23% vs 27%, 11% vs 14%). Finally, VR games with a headset are the least popular format for this demographic, with just 3% regularly engaging in them, lower than the 7% observed in the general population. Such differences reflect possible cost barriers for more financially deprived people.

In line with the population average, **75% of low-income respondents state that they do not consider the nationality of a game a factor**, as they focus on aspects such as quality, narrative, and aesthetics, or they do not know the nationality of the games they play.

For those who do consider nationality, **only 10% of low-income people express a desire to support their national or European gaming industry**, lower than the 14% observed in the general population. Another **11% consider the nationality of a game because they like stories or themes that reflect their culture or identity**, similarly to the 12% reported in the general population.

Video games expenditure

Compared to the overall population (35%), a **significantly lower share of low-income individuals (27%) report having spent money on video games within the last six months**.

56% state that they only play free or freemium games and did not spend money on video games during this period. This is higher than the 50% observed in the general population, suggesting that free-to-play models are more popular among lower-income groups.

Finally, 16% of low-income respondents indicate that they only play games they purchased more than six months ago without making additional purchases. This is similar to the 15% reported in the general population, showing consistency across demographics.

3.2.5. Technology and innovation trends

Virtual and Augmented Reality

Among respondents with an uncomfortable financial situation, 78% report not having tried either VR or AR. This is higher than the 71% of the general population who have not engaged with immersive technologies.

Among this most deprived group, only 14% have tried VR, lower than the 17% in the general population, and **5% have tried both VR and AR**, a lower score than the 8% in the general population. Moreover, **only 3% have tried AR alone**, less than the 4% reported in the general population.

Watching films or series is the most popular potential use for AR/VR among low-income people, with 23% of respondents expressing interest, in line with the average population. Playing games and using AR/VR for training, learning, or work purposes attract 22% and 15% of respondents, respectively, which is slightly lower with respect to the average (respectively, 24% and 18%). Other potential uses include health and well-being (14%), to better understand complex issues (14%), culture or tourism (13%), to watch sports (11%) and social interactions (9%), in line with the broader population. However, **45% of respondents do not have any particular interest in using AR/VR**. This is higher than the average population (38%), reflecting lower curiosity, knowledge or willingness to invest time and resources in these technologies among the lower-income groups.

Digital literacy

Low-income individuals demonstrate slightly lower confidence and understanding of digital device settings and personalised recommendations compared to the general population. The gap is particularly notable for smart TVs, and in understanding how personalised recommendations work.

For mobile/smartphone/tablet settings, 65% of low-income respondents confidently state they know how to personalise and change the default settings, compared to 69% among the general population. Regarding smart TVs, 57% claim to have knowledge of how to personalise and change default settings, lower than the general population (63%). For personalised recommendations, 20% fully understand how these work, and 42% mostly understand. This is widely in line with the general population (respectively, 23% and 44%).

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