

Media Consumption Habits - UK - September 2015

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The rapid growth of short-form online video is impacting the media landscape; with Millennials in particular increasingly prioritising the mobile friendly content. As YouTube and other short-form platforms look to enter into the subscription sphere, long-form video platforms need to consider ways of adapting content to better suit all occasions and devices.

This report looks at the following areas:

- The importance of short-form video
- The impact of new music streaming services

The music subscription market has undergone significant changes over the last year, with Spotify's dominance being challenged by multiple new entrants, including Tidal, Apple Music, YouTube Music Key and Prime Music. Mintel's consumer research suggests a challenging road lies ahead in capturing the currently small paying music subscription consumer base. Music streaming services need to convince more free users to upgrade by expanding and diversifying their offerings.

The once booming e-book market is beginning to stall, facing the resilience of the print medium and increased investment and interest in the audiobook format. Price is currently the primary appeal of e-books, but going forward e-book producers can look to put experience front and centre through further investment in the 'enhanced e-book' concept.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Issues and Insights

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- The fact
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- The impact of new music streaming services
- The facts
- The implications

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- Television sets market steady
- Volume of TV subscriptions will continue to grow
- Music and video show positive growth
- Subscription VoD set to become £1 billion industry
- Value of music subscription forecast to increase by 163%
- e-book growth levelling off

The Markets

- Televisions and pay-TV services
- Volume of TV subscriptions will continue to grow
Figure 6: Total value of television set sales (current prices) and volume of pay-TV subscriptions, 209-19

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Music and video

Music and video show positive growth

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Figure 8: Value of video sales, 2009-19

Subscription VoD set to become £1 billion industry

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e-book growth levelling off

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Key Players – What You Need to Know

Tidal and Apple Music take on Spotify

Spotify moves into video

Music added to Amazon Prime

Comcast to launch YouTube rival

Vessel introduces short-form subscription service

Harlequin offers e-book rewards programme

Audible launches original audiobook series

Launch Activity and Innovation

Tidal, Apple Music and Prime Music take on Spotify ...

...while Spotify branches out into video

Comcast set to launch YouTube rival

Vessel introduces short-form subscription service

Audible launches original audiobook series

Harlequin offers e-book rewards programme

The Consumer – What You Need to Know

A third of people purchased a DVD in the last year

Video streaming subscription purchases double those of music

Mobile devices central to video consumption

Few express concern regarding fair pay for artists

Most people multi-task while watching TV

People give little attention to adverts

Few willing to pay to remove ads from online videos

Price of e-books is key

Music and Video Purchased

A third of people purchased a DVD in last year

Figure 11: Music and video purchased by consumers, June 2015

Video streaming subscription purchases double those of music

Most people are light media spenders

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Activities on Devices

Mobile devices catching up with laptops

Figure 13: Activities on devices, June 2015

Adapting for different devices

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Few express concern regarding fair pay for artists

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Most people multi-task while watching TV

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Little willingness to pay to remove ads

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