

INNOVATING TO IMPACT

dentsu

NORTH AMERICA EDITION

ENTERTAINMENT FOR ALL THE SENSES: LIVE EXPERIENCES, AUDIO, MOVIES & TV SERIES

APRIL 2026



PART OF THE DENTSU CONSUMER NAVIGATOR SERIES

ABOUT THIS STUDY

Survey Methodology

- The survey was conducted by dentsu via Toluna, an online research panel.
- Administered on April 4th, 2026.
- Distributed among a random sample of 700 U.S. respondents, and 713 Canada respondents, 18 years of age or older.
- Controls for nationally representative weighting across age, gender, region, race and ethnicity (using the latest publicly available U.S. and Canada Census numbers).



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TOP CONSUMER INSIGHTS

SPORTS FANDOM IS A KEY ENGAGEMENT DRIVER FOR BRANDS

Community and competitiveness boost engagement in sports events, and thus with sponsoring brands also. Perks tied to sports tournaments, especially discounted and early access, can drive deeper engagement.

LIVE PERFORMANCES ARE A FLYWHEEL FOR ENGAGEMENT WITH A BROADER MEDIA AND BRAND ECOSYSTEM

For instance, 20% of respondents say they would watch concert films featuring their favorite performers in the movie theatre or buy products from partner brands to collect tour-related memorabilia. Fans are also engaging with online communities and influencers to get behind-the-scenes news on their favorite performers.

AUDIO FORMATS ARE A PERVASIVE PRESENCE IN CONSUMERS' LIVES BRANDS MUST TAKE ADVANTAGE OF

Whether it's because of multi-tasking, screen-fatigue, or the desire to immerse themselves in a content format that stimulates them in a different way, on average 4 in 10 North Americans engage at least weekly.

PODCAST AND RADIO HOSTS ARE SUPER-INFLUENCERS THAT CAN MAKE OR BREAK CONSUMERS' TRUST IN A BRAND

More than half of respondents said that what their favorite hosts say about a brand significantly influences their opinion of it. 'Organic' integrations, where brands are connected to the program or content either geographically, through history, or thematically are poised to be more successful.

ENTERTAINMENT IP NOW OPERATES AS AN ECOSYSTEM FOR BRANDS TO PERMEATE AT 360 DEGREES

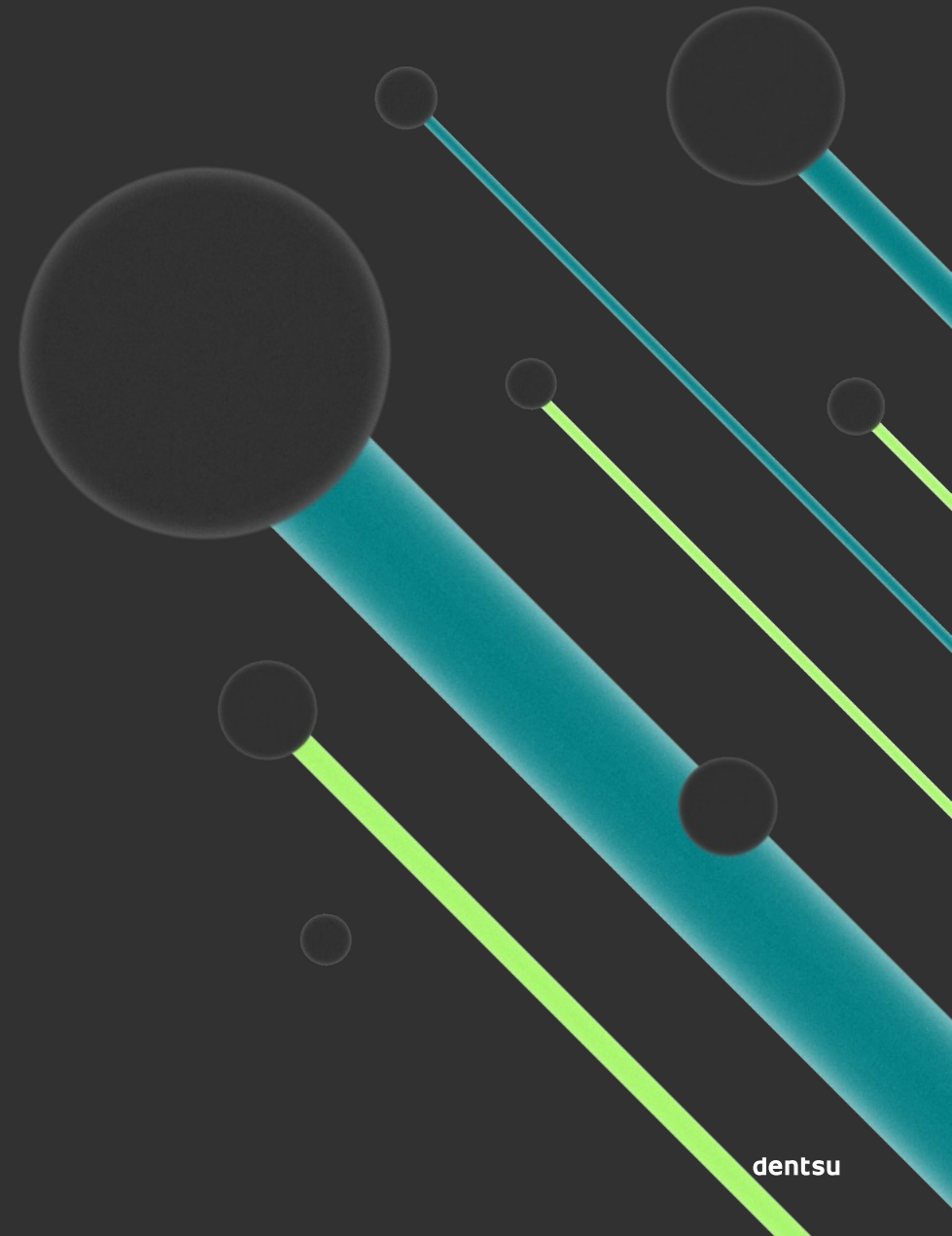
For instance, consumers are now going to the movie theatre to watch theatrical releases of anime and TV show arcs. And 1 in 4 would buy apparel that features their favorite IP, characters or celebrities.

MICRO-DRAMAS ARE AN EMERGING GENRE THAT IS RIPE FOR BRAND INTEGRATIONS

1 in 5 North Americans watch micro-dramas and half of viewers say they are more likely to follow, like, and purchase brands that are being featured in this type of content.



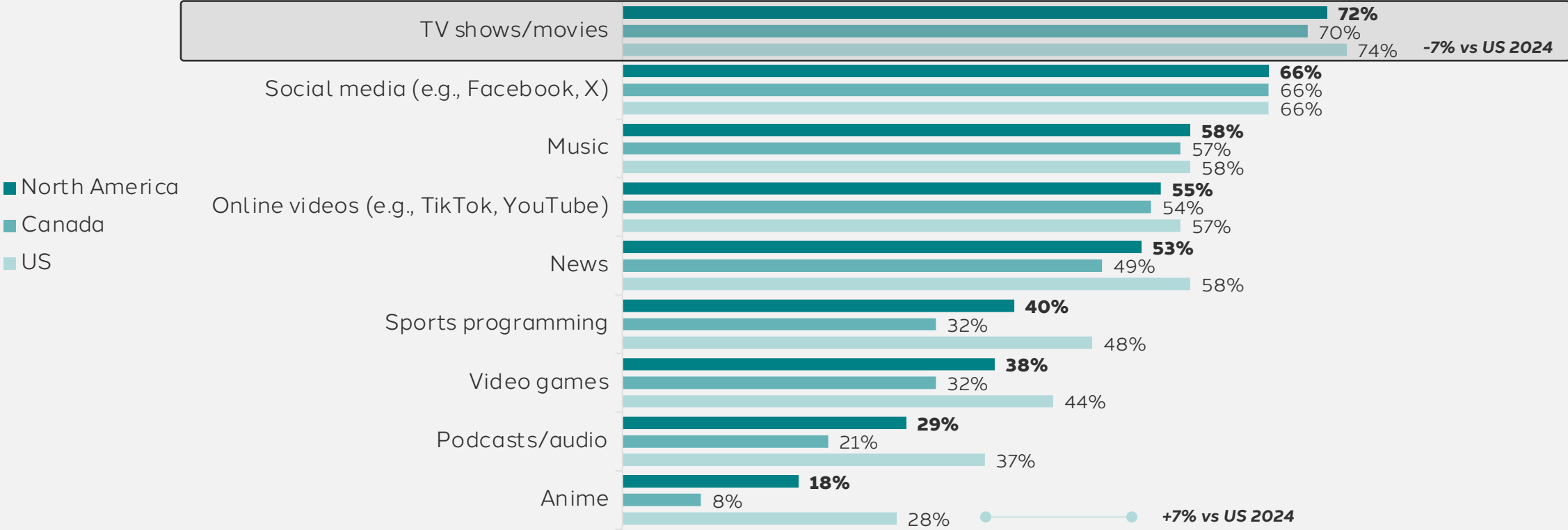
Before we deep dive into our focus entertainment genres, let's take a quick look at North American consumer preferences across the entire landscape...



TV SHOWS AND MOVIES ARE STILL THE MOST POPULAR FORM OF ENTERTAINMENT IN NORTH AMERICA

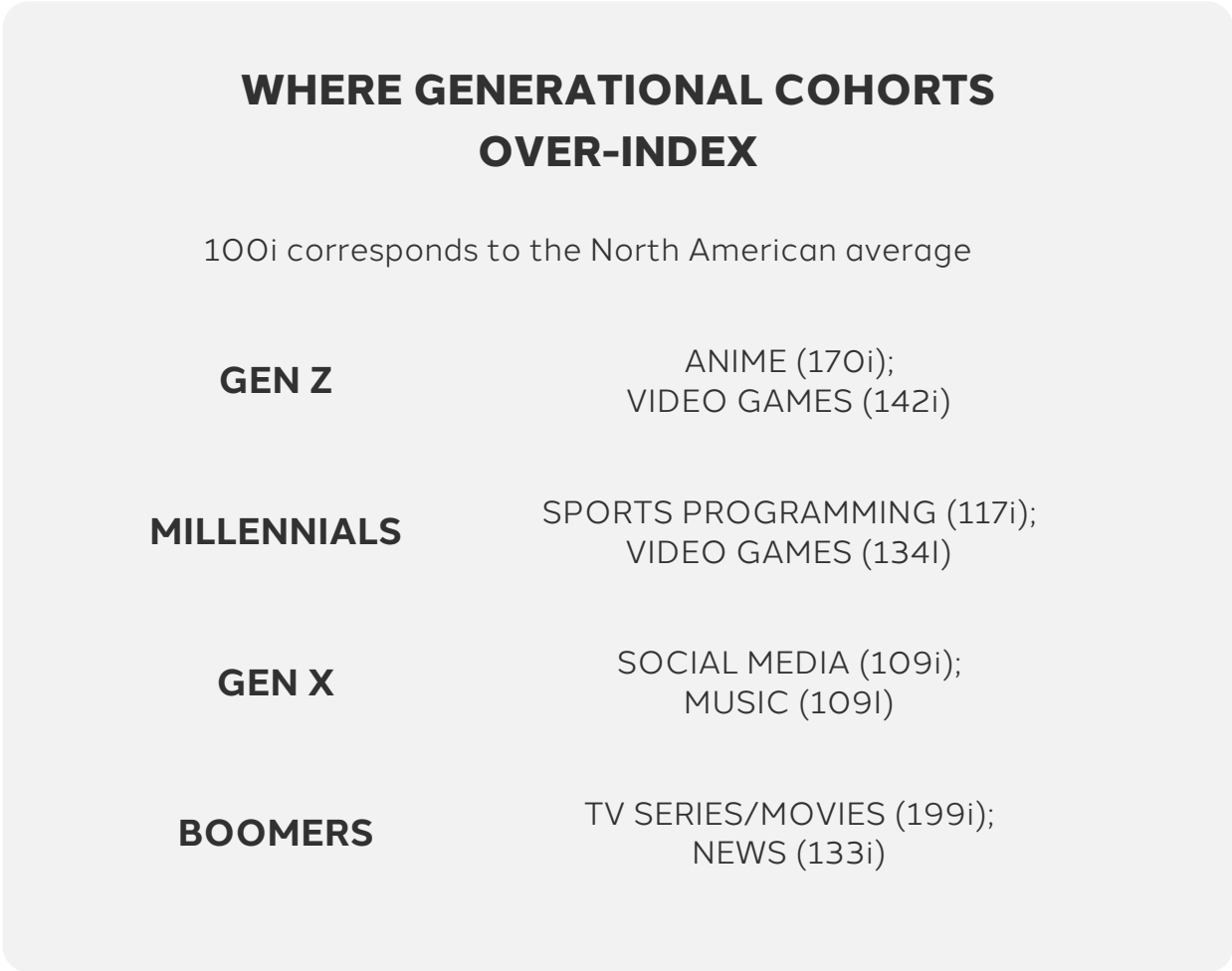
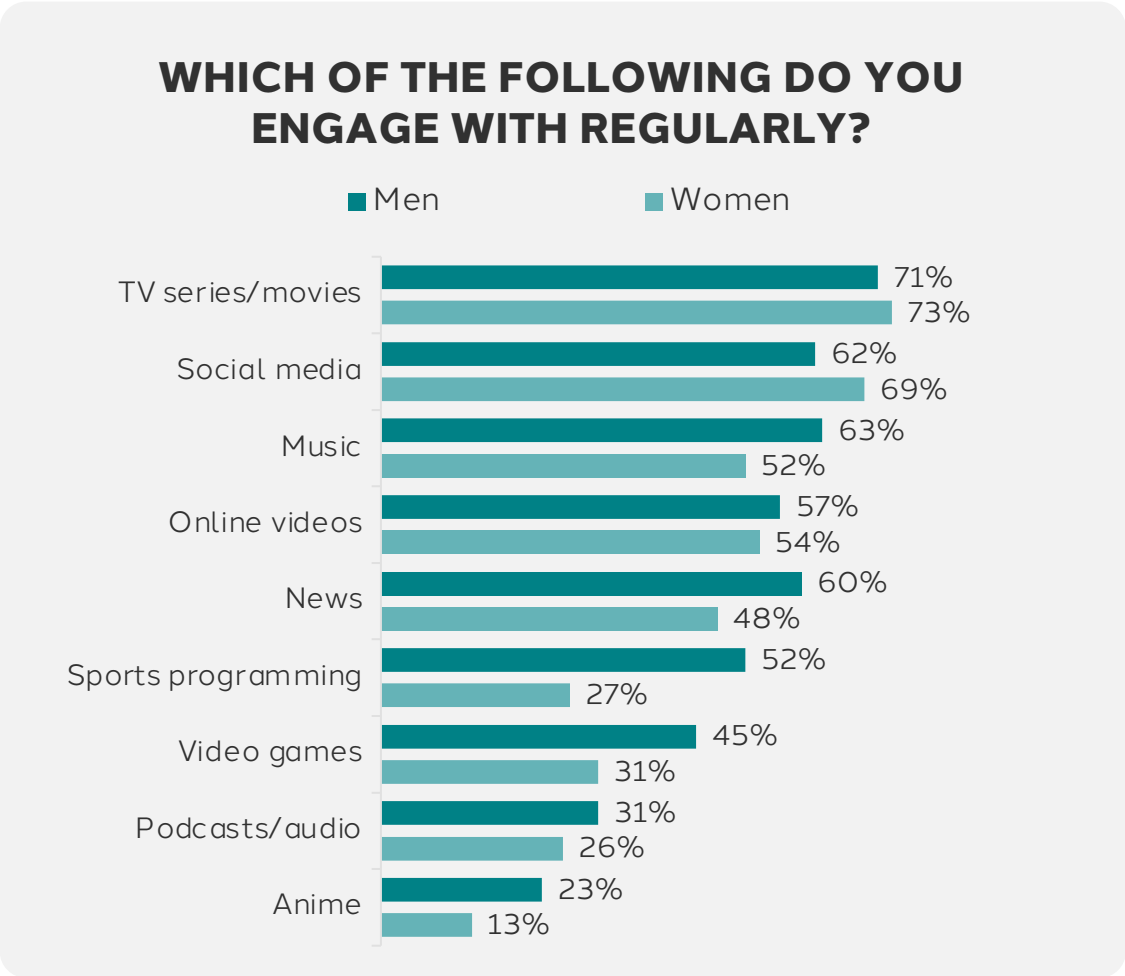
However, engagement in the US is declining. Conversely, US consumer engagement with anime is growing, compared to 1.5 years ago.

WHICH OF THE FOLLOWING TYPES OF CONTENT DO YOU ENGAGE WITH MOST REGULARLY?



GEN ZERS OVERINDEX IN ENGAGEMENT WITH ANIME AND VIDEO GAMES, WHILE MILLENNIALS LEAN MORE INTO SPORTS

Men are particularly engaged with the news, while Women are more invested in social media.



LIVE EXPERIENCES AND THE IMPORTANCE OF CULTURAL MOMENTS

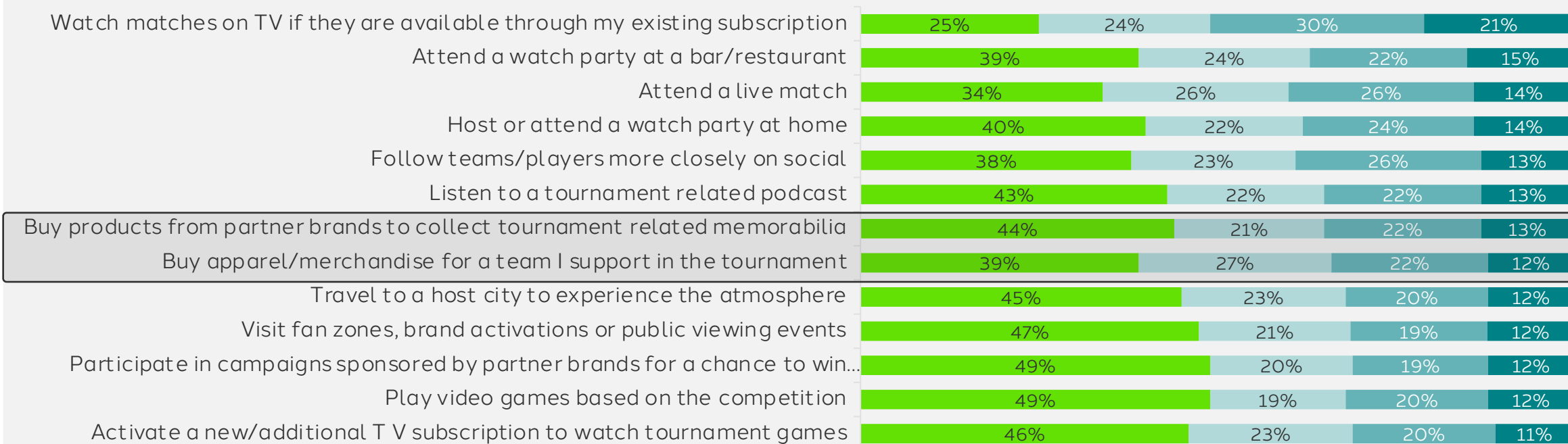


SPORTS FANDOM IS A KEY DRIVER FOR BRAND ENGAGEMENT

No cost-of-entry activities like watching games on existing subscriptions garner wide participation across all levels of fandom, but when it comes to sports consumers care a lot about, they are likely to participate in brand campaigns to collect memorabilia related to the competition or to splurge on themed apparel.

WHICH OF THE FOLLOWING ARE YOU LIKELY TO DO WHEN A MAJOR INTERNATIONAL TOURNAMENT FOR A SPORT DISCIPLINE YOU FOLLOW TAKES PLACE?

- I would NEVER do this
- I would ONLY do this for sports I CARE A LOT about
- I would ONLY do this for sports I am a SUPER-FAN of
- I would ALSO do this for sports I follow CASUALLY

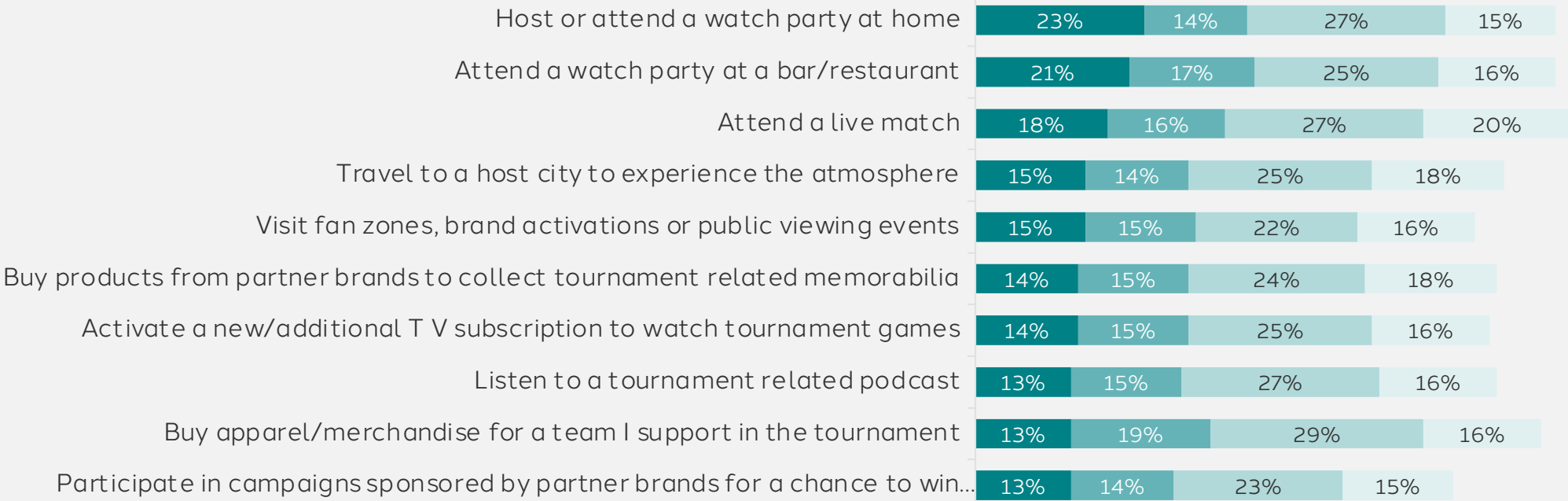


COMMUNITY AND COMPETITIVENESS BOOST ENGAGEMENT IN SPORTS EVENTS, MORE THAN PROXIMITY TO THE GAMES

Across the board, consumers are more likely to increase their engagement if they have friends who are as invested in the event as they are, or if they think the team they are supporting has a chance at winning.

WHICH OF THE FOLLOWING IS MOST LIKELY TO INCREASE YOUR ENGAGEMENT IN THE FOLLOWING ACTIVITIES SURROUNDING INTERNATIONAL SPORTS TOURNAMENTS?

- A group of friends is as invested in the event as I am
- An athlete I am a superfan of has a chance at winning
- The team I support has a chance at winning
- The competition is being held in my home/my neighbouring country

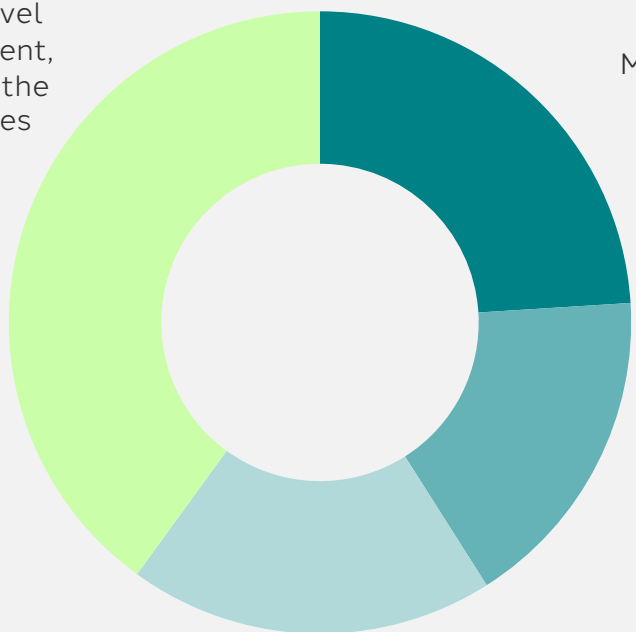


4 IN 10 CONSUMERS WOULDN'T TRAVEL FOR A SPORTS TOURNAMENT, BUT THOSE WHO WOULD WANT TO HAVE AN ALL-ACCESS EXPERIENCE

US consumers and Gen Zers have a pragmatic mindset, and over-index on connecting the sports experience to existing travel plans.

IF YOU WERE TO TRAVEL FOR AN INTERNATIONAL SPORTS TOURNAMENT, WHICH TYPE OF TRIP WOULD YOU PREFER TO TAKE?

I wouldn't travel for a tournament, regardless of the circumstances
40%



Match ticket trip
24%

Add-on to another trip
19%

Host city vibe trip
17%

TRIP PREFERENCE HIGHLIGHTS

CANADA

no over-indexation

US

ADD-ON TO ANOTHER TRIP (110i)

MEN

MATCH TICKET TRIP (112i)

WOMEN

no over-indexation

GEN Z

ADD-ON TO ANOTHER TRIP

MILLENNIALS

MATCH TICKET TRIP (129i)

GEN X

HOST CITY VIBE (105i)

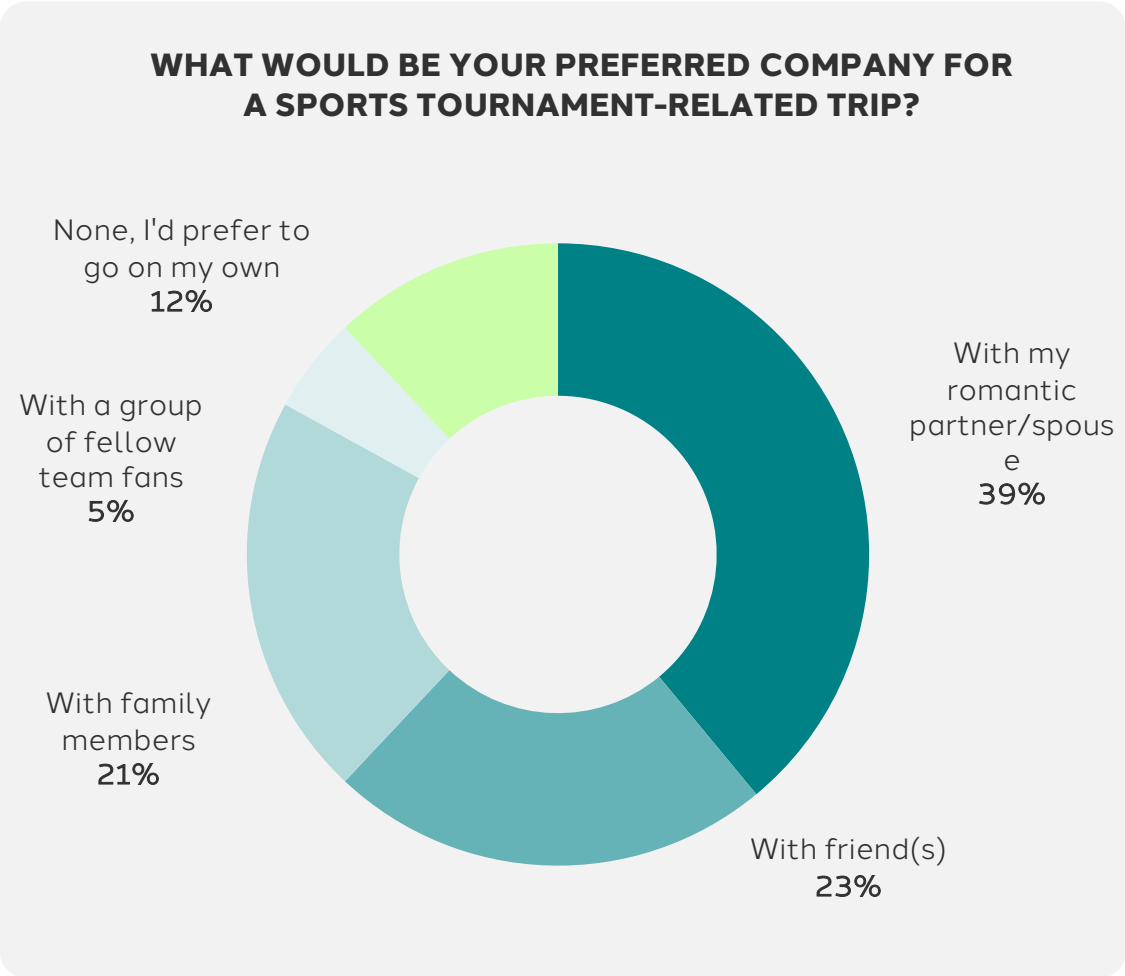
BOOMERS

no over-indexation



TRAVEL FOR SPORTS EVENTS IS OFTEN A COUPLE’S RETREAT

4 in 10 respondents said if they were to travel to attend a sports event, they would do so with their significant other. Millennials over index on wanting to take part in collective team fan attendance.



PREFERRED COMPANY HIGHLIGHTS

CANADA	WITH FRIENDS (138i)
US	WITH MY ROMANTIC PARTNER (109i)
MEN	ON MY OWN (125i)
WOMEN	WITH MY ROMANTIC PARTNER (120i)
GEN Z	ON MY OWN (150i)
MILLENNIALS	WITH FELLOW FANS (140i)
GEN X	WITH FRIEND (138i)
BOOMERS	WITH FAMILY MEMBERS (109i)

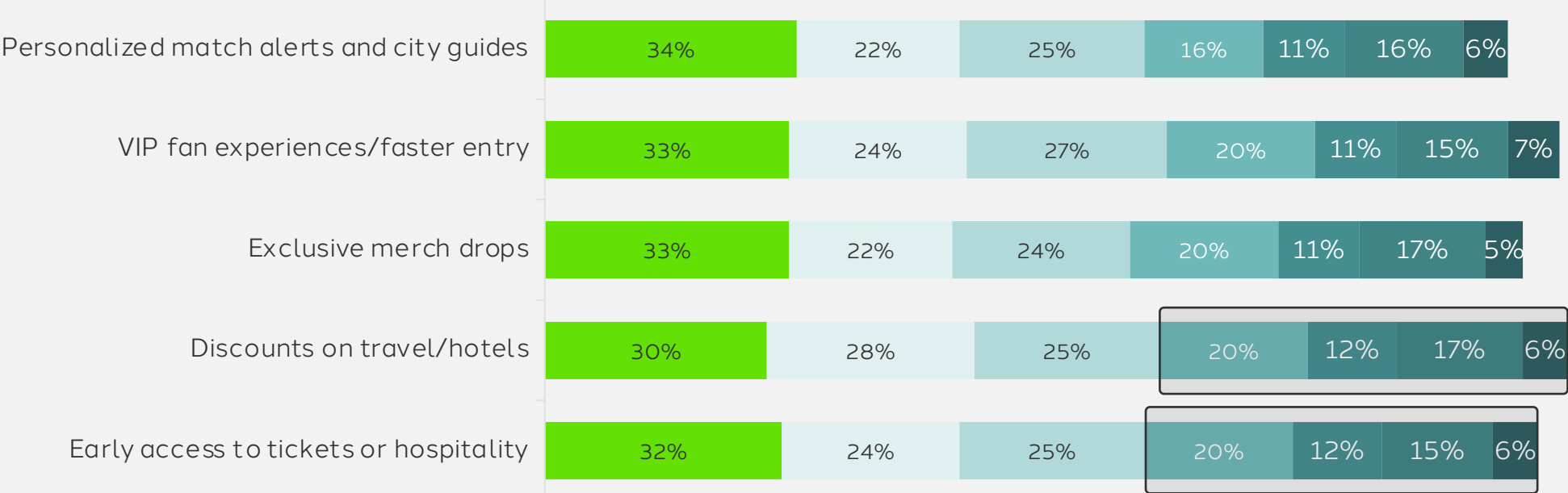


PERKS TIED TO SPORTS TOURNAMENTS, ESPECIALLY DISCOUNTED AND EARLY ACCESS, CAN DRIVE DEEP ENGAGEMENT WITH PARTNER BRANDS

6% of consumers are willing to go as far as signing up for a product/service subscription, and many more are open to taking part in surveys, sharing shopping preferences, and follow sponsoring brands on social media.

WHICH OF THE FOLLOWING WOULD YOU ENGAGE IN EXCHANGE FOR THE FOLLOWING PERKS RELATED TO AN INTERNATIONAL SPORTS TOURNAMENT?

- I would NOT engage in any of these
- Share SHOPPING info
- SIGN UP for a product/service subscription
- Share BASIC info
- Share DEEPER info
- FOLLOW the brand/event on social
- Take part in a post-event SURVEY

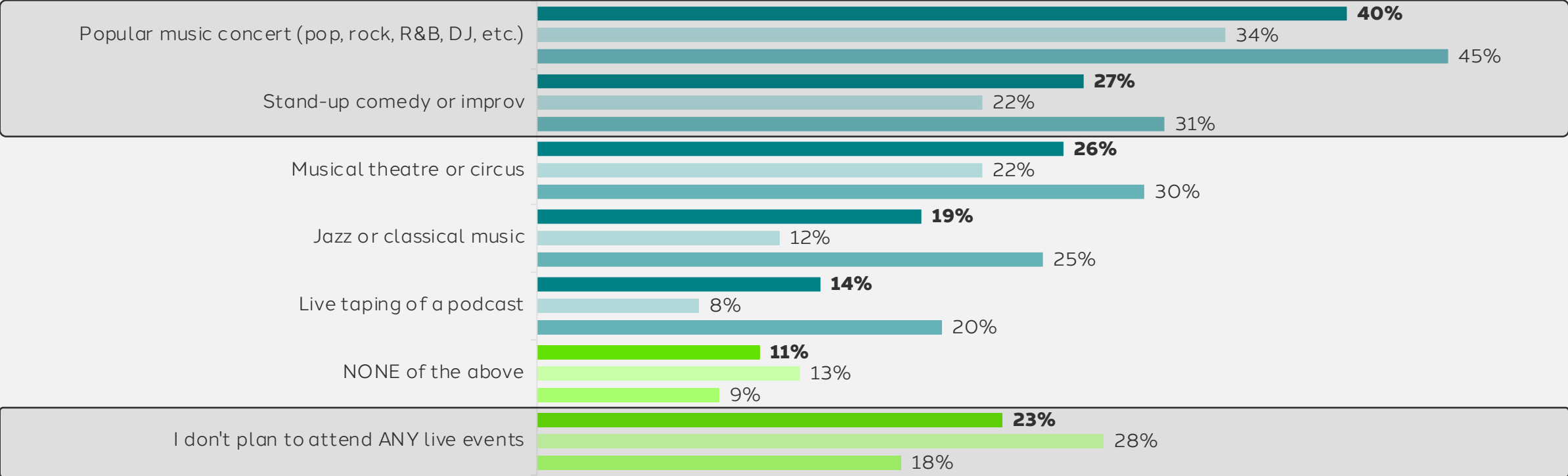


POP MUSIC PERFORMANCES ARE HIGHLY ANTICIPATED BY CONSUMERS, BUT STAND-UP COMEDY IS ALSO IN HIGH DEMAND

Only 2 in 10 don't plan to attend any live performances throughout the year.

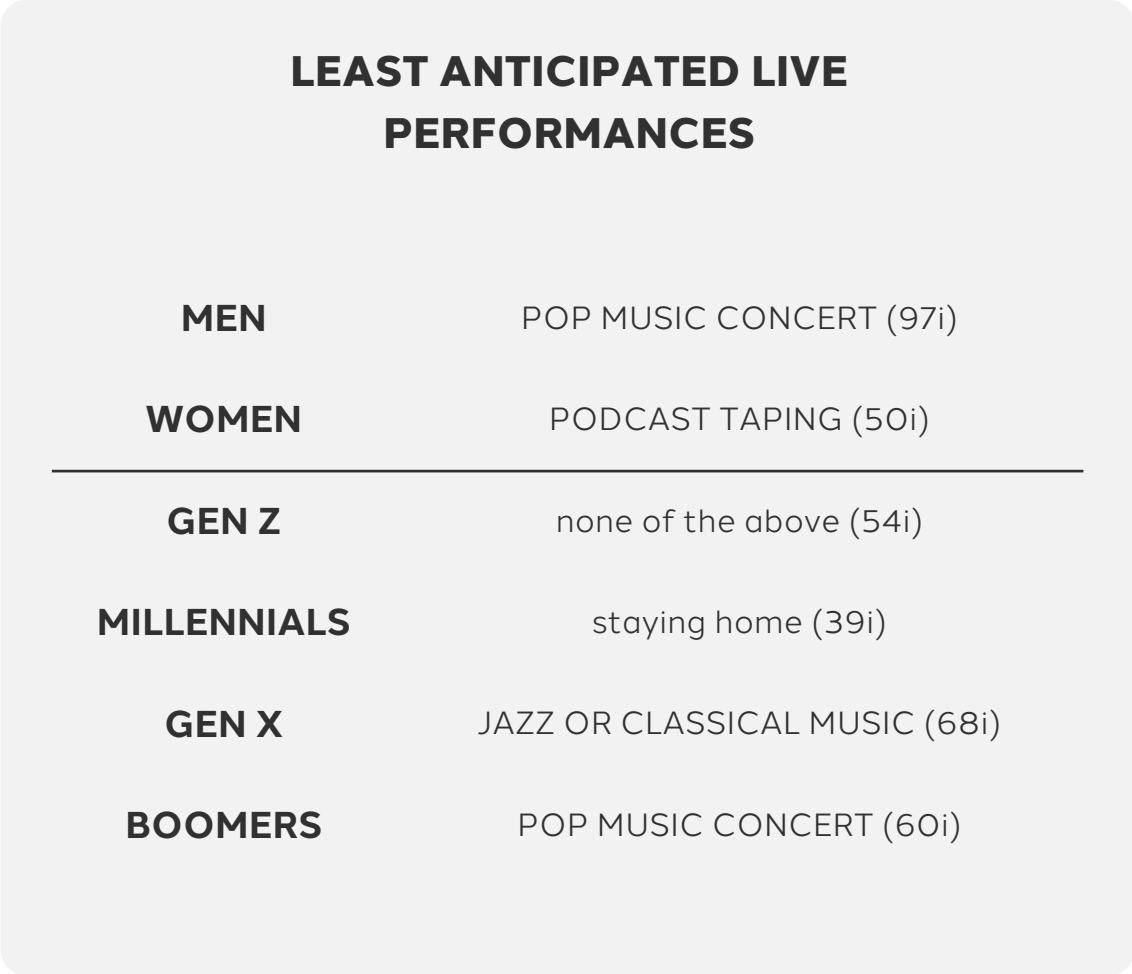
WHICH TYPE OF LIVE PERFORMANCES DO YOU MOST LOOK FORWARD TO ATTENDING IN THE NEXT 12 MONTHS?

■ North America ■ Canada ■ US



COMEDY BRINGS GEN Z AND GEN X TOGETHER, WHILE MILLENNIALS AND WOMEN ARE MOST LIKELY TO LEAN INTO POP MUSIC SHOWS

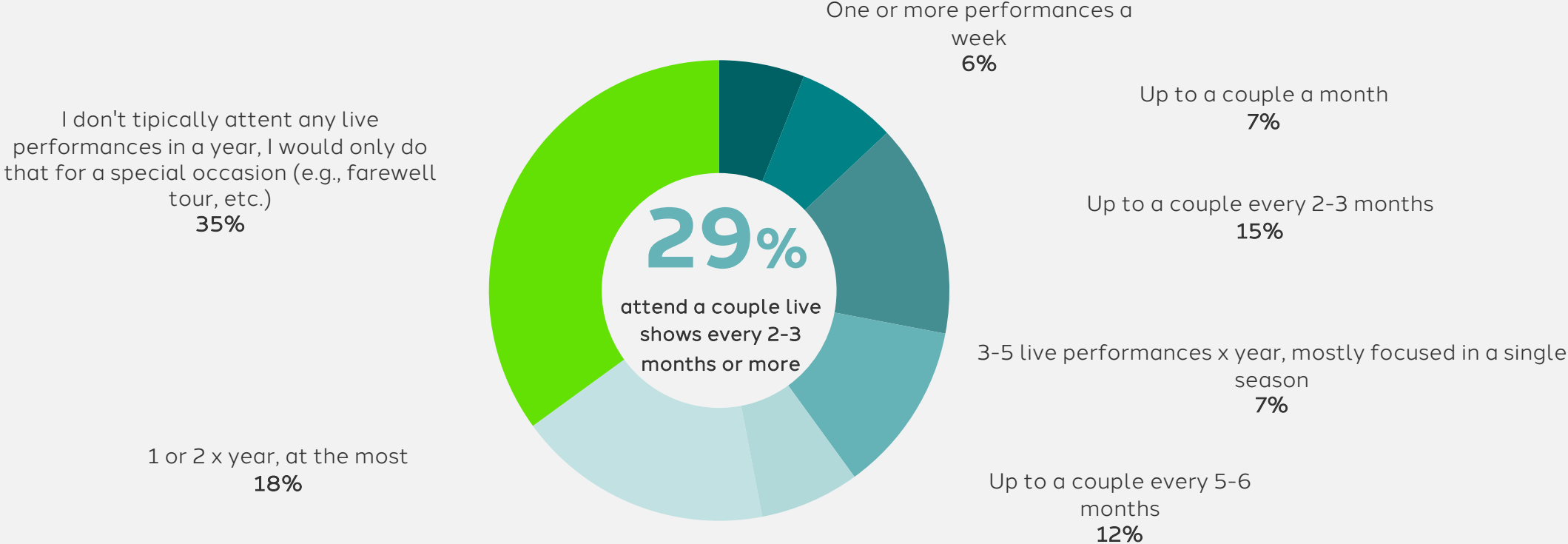
Unsurprisingly, Boomers make the lion's share of those who are planning to stay home.



FOR 3 IN 10 CONSUMERS, ATTENDING LIVE SHOWS IS A REGULAR FIXTURE IN THEIR LIVES

6% go as far attending one or more performances weekly.

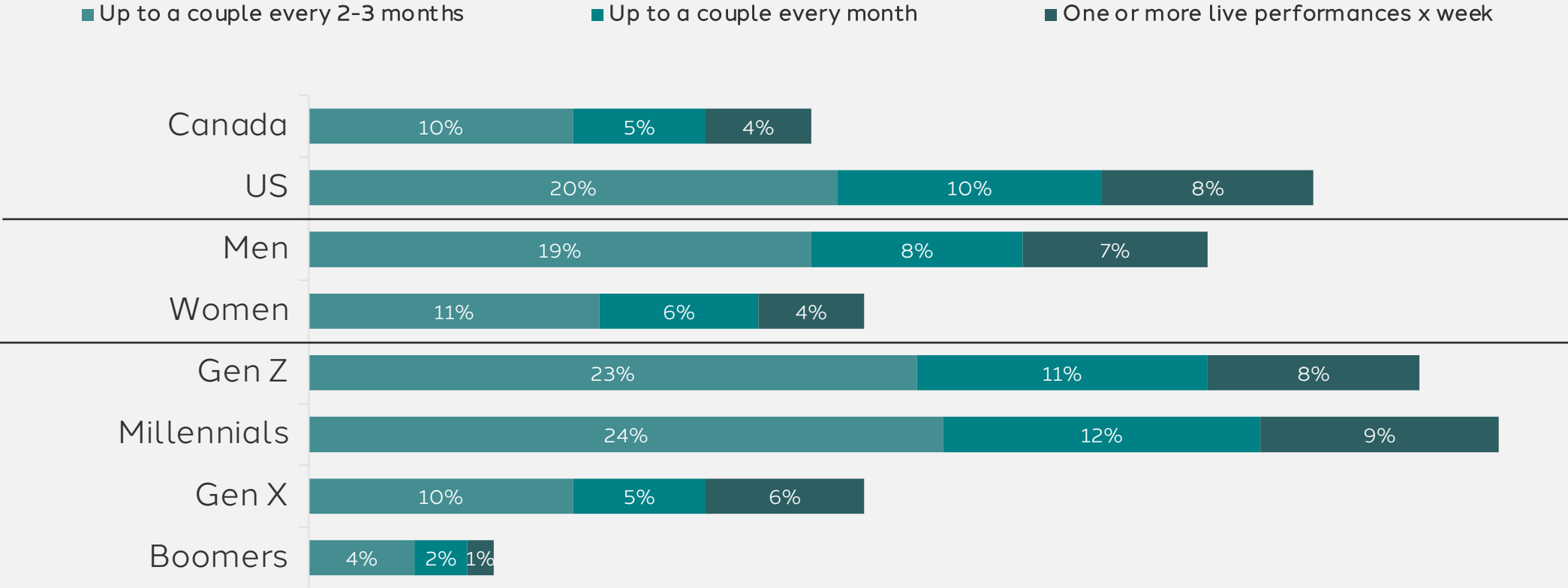
HOW FREQUENTLY DO YOU ATTEND LIVE PERFORMANCES?



US CONSUMERS ARE SIGNIFICANTLY MORE LIKELY TO LEAN INTO LIVE PERFORMANCES, COMPARED TO CANADIAN ONES

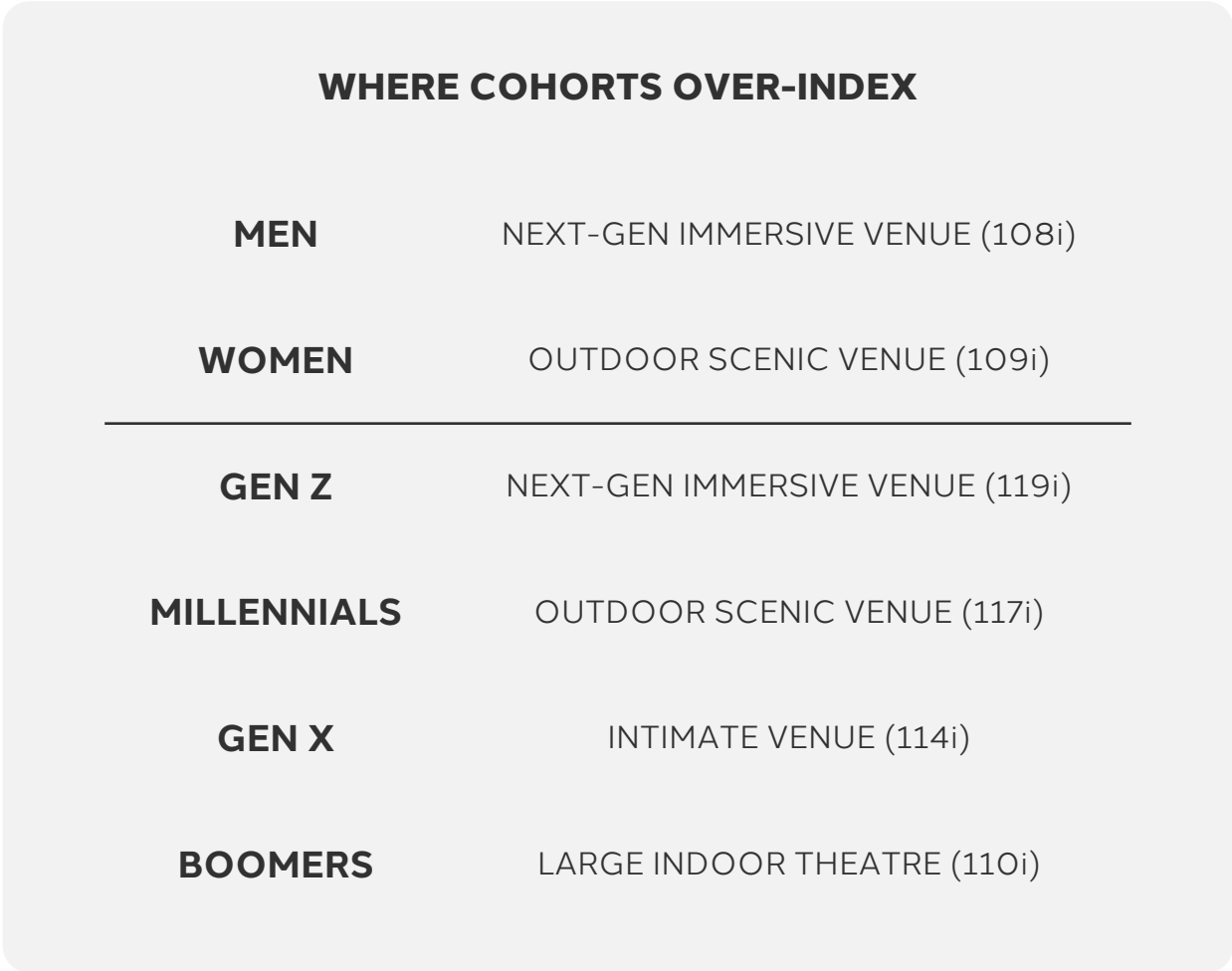
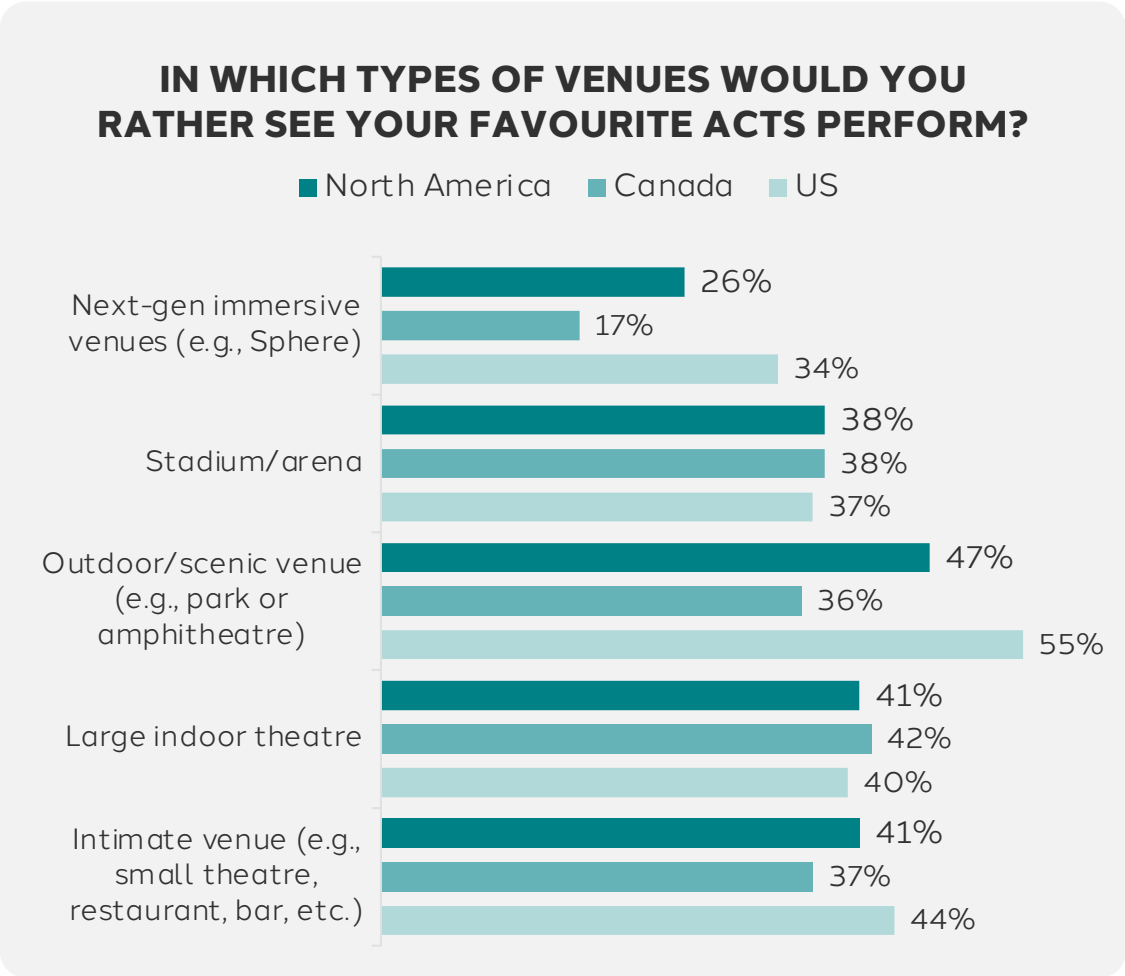
Expectedly, younger cohorts are more likely to frequently attend shows. Men report attending shows more often than Women.

HOW FREQUENTLY DO YOU ATTEND LIVE PERFORMANCES?



OUTDOOR/SCENIC VENUES ARE CONSIDERED THE IDEAL SETTING FOR LIVE PERFORMANCES, BUT CONSUMERS ALSO LIKE INTIMATE ONES

Next-gen immersive venues like the Sphere garner the interest of 1 in 4 consumers. Interest is driven by Men and Gen Zers.



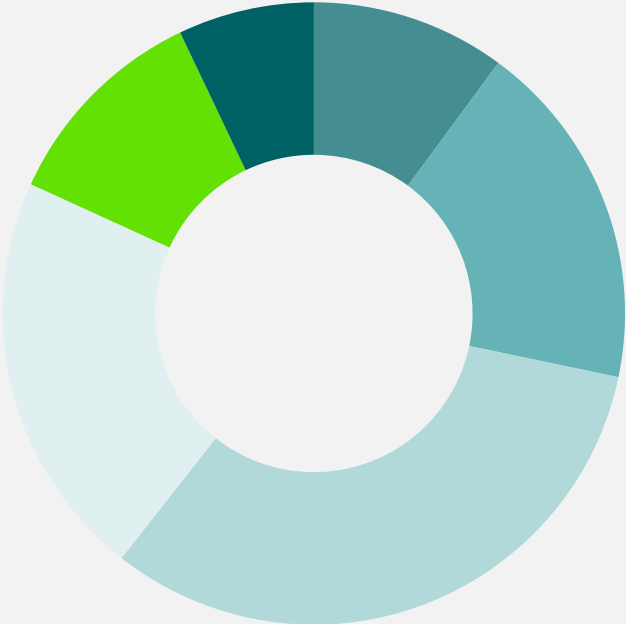
FOR HALF OF CONSUMERS, LIVE PERFORMANCES ARE ABOUT BEING ABLE TO SAY ‘I WAS THERE’

It’s about seeing their favorite performers at least once or about attending at least one performance in their next tour.

WHICH OF THE FOLLOWING BEST REFLECTS TO WHAT EXTENT YOU WOULD TRY TO FOLLOW YOUR FAVORITE PERFORMERS IF THEY ARE TOURING?

I wouldn’t go see them perform live at all – I’m happy to only experience them via recordings, broadcasts, TV appearances etc. from my home
7%

Even if they are my favorite performer(s), I would only go see them perform live in the context of a multi-concert festival where I can see several artists I am interested in within a limited number of days
11%



I would try to attend as many of their live performances on the tour as I could
10%

I would try to attend 2-3 of their live performances on the tour
18%

If I have never seen them perform live before, I would try to attend a single live performance so I can say "I have seen them live once"
21%

Even if I have seen them perform before, I would try to attend a single live performance on the tour so I can say "I took part in it"
33%



FOR GEN ZERS LIVE PERFORMANCES ARE NEVER TOO MANY, FOR OLDER COHORTS IT'S ABOUT CHECKING A BOX ON THE BUCKET LIST

Men over-index on attending multiple shows of their favorite act per tour, while Women are happier with the single one.

MOST LIKELY APPROACH TO FAVORITE ACTS TOURING

MEN	ATTEND 2-3 SHOWS ON THE TOUR (128i)
WOMEN	ATTEND A SINGLE TOUR PERFORMANCE (133i)
<hr/>	
GEN Z	AS MANY AS POSSIBLE (140i)
MILLENNIALS	ATTEND A SINGLE TOUR PERFORMANCE (125i)
GEN X	SEE THEM LIVE ONCE I I HAVE NEVER DONE SO BEFORE (150i)
BOOMERS	SEE THEM LIVE ONCE I I HAVE NEVER DONE SO BEFORE (152i)

LEAST LIKELY APPROACH TO FAVORITE ACTS TOURING

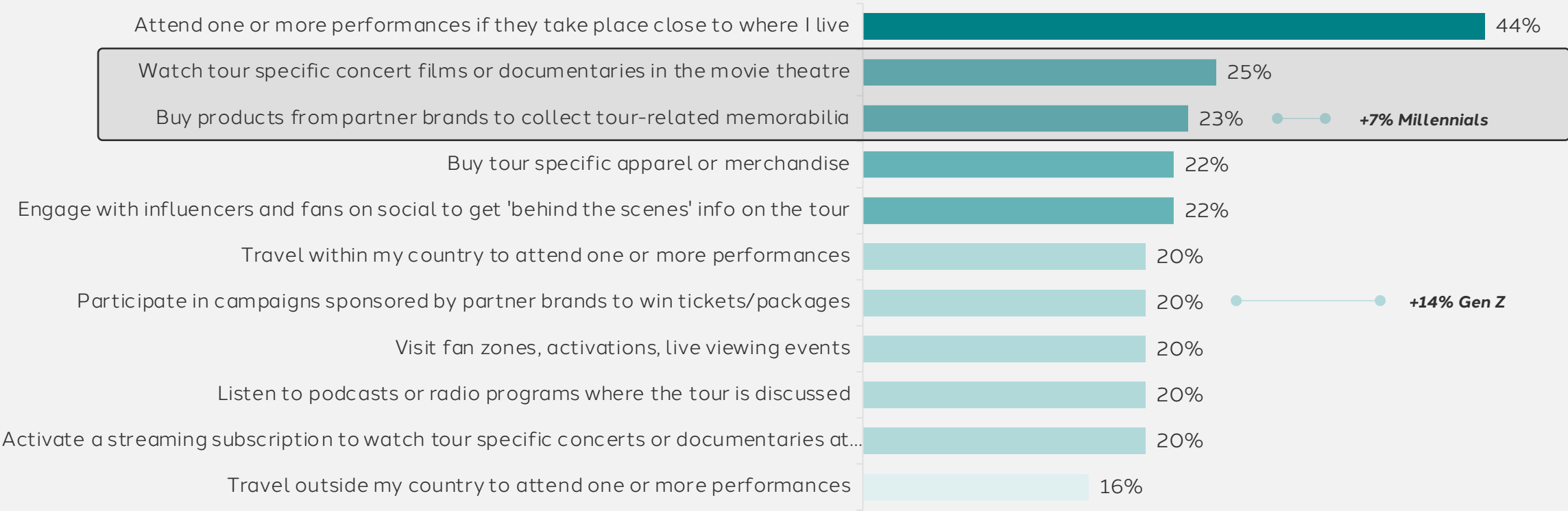
MEN	NOT GO SEE THEM AT ALL (86i)
WOMEN	ATTEND 2-3 SHOWS ON THE TOUR (66i)
<hr/>	
GEN Z	SEE THEM LIVE ONCE I I HAVE NEVER DONE SO BEFORE (76i)
MILLENNIALS	SEE THEM LIVE ONCE I I HAVE NEVER DONE SO BEFORE (62i)
GEN X	ATTEND 2-3 SHOWS ON THE TOUR (66i)
BOOMERS	ATTEND 2-3 SHOWS ON THE TOUR (58i)



LIVE PERFORMANCES ARE A FLYWHEEL FOR ENGAGEMENT WITH A BROADER MEDIA AND BRAND ECOSYSTEM

Over 20% of fans would go watch concert films in the movie theatre and buy branded products to collect tour memorabilia.

WHICH OF THE FOLLOWING ARE YOU MOST LIKELY TO DO IF YOUR FAVOURITE PERFORMER(S) ARE TOURING?



FAIR PRICING IS PRIORITIZED AHEAD OF OTHER CONSIDERATIONS WHEN IT COMES TO SUPPORTING LIVE EXPERIENCES

With that being said, a large share of consumers would restrain from engaging if events are taking place in countries that don't align with their values.

THINKING ABOUT BOTH SPORTS EVENTS AND LIVE PERFORMANCES, WHICH OF THE FOLLOWING WOULD LEAD YOU TO RESTRAIN FROM ENGAGING THE WAY YOU NORMALLY WOULD?



IMPLICATIONS FOR MARKETERS

POSITION THE BRAND AS A VALUE-ADD FOR FAN COLLECTIVES

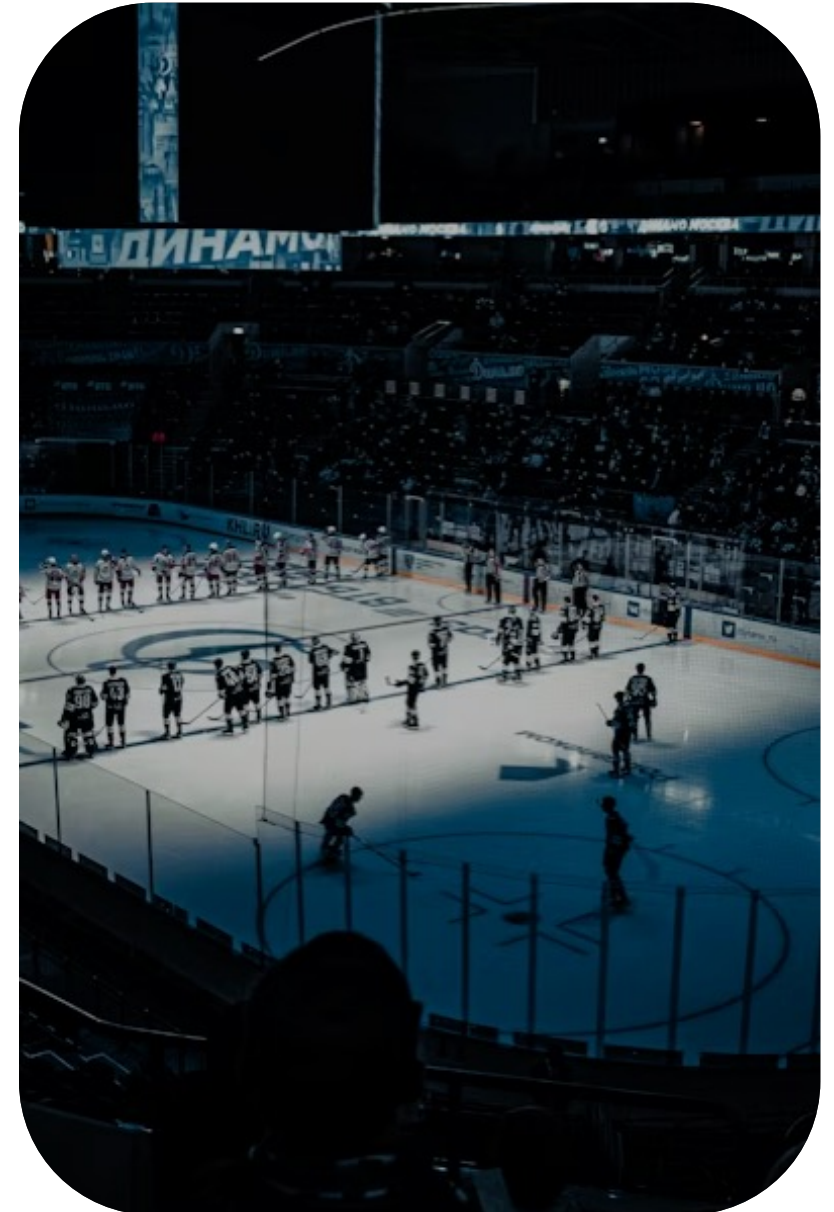
Consumers whose fandom for a sports team, athlete, or performer is deeper are more likely to engage in brand activations, and their engagement is likely going to be higher across the board if they are experiencing the event as a group. Access to consumer info, insights, and wallets can be unlocked by offering event-related perks such as early access, discounts, or exclusive memorabilia.

LEAN INTO FOMO

When it comes to live experiences, bragging rights are a huge driver for engagement. Position your integrations into music and comedy as branded-enablement of a once-in-a-lifetime opportunity to be part of something unmissable. Consider how your activations can add something unique to the experience that will generate FOMO among fans, and how you can build moments that help fans immortalize their participation.

THINK IN TERMS OF ECOSYSTEM VS. STAND-ALONE EVENT

Live experiences continue beyond the encore, whether that occurs at the movie-theatre, in online forums, or through products that fans are wearing and using for years to come. Think about activations in this space as an ecosystem that extends beyond the sponsorship of the live event. For instance, who are the influencers that fans of the team or act you are focusing on trust the most, and how can you engage them? Think through an ecosystem lens also to select which tournaments or tours you want to be involved in. What are the broader socio-economic implications tied to them?



RADIO, PODCASTS, AND THE 'INVISIBLE' INFLUENCE OF AUDIO- LED ENTERTAINMENT

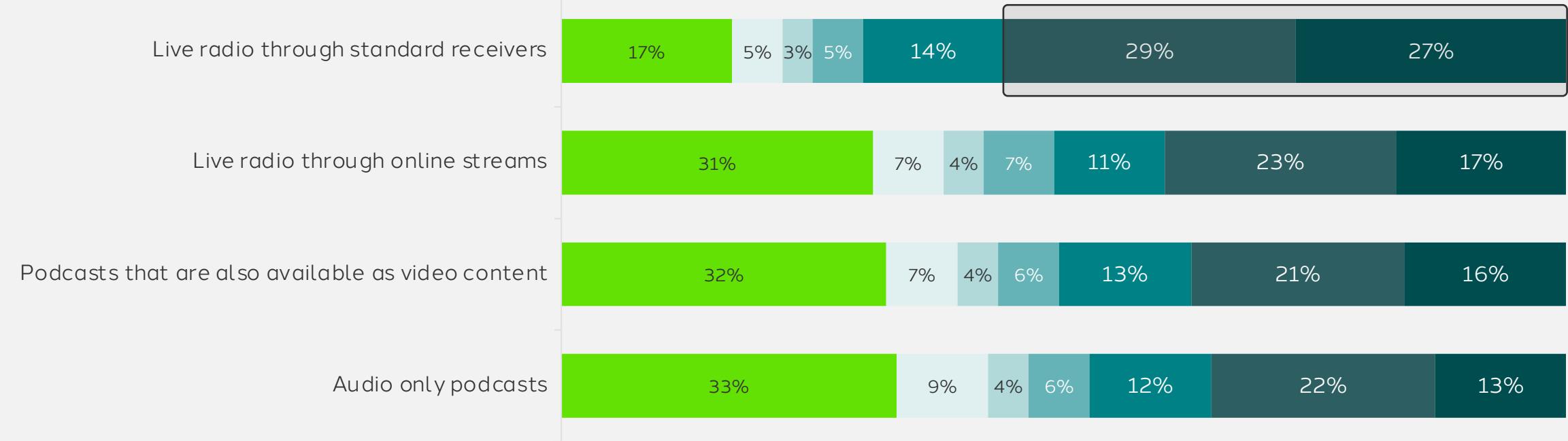


LIVE RADIO THROUGH STANDARD RECEIVERS IS STILL THE MOST POPULAR FORMAT, BUT ALL FORMS OF AUDIO ENTERTAINMENT GARNER SIGNIFICANT ENGAGEMENT

More than half of North American consumers engage with traditional live radio on a weekly basis.

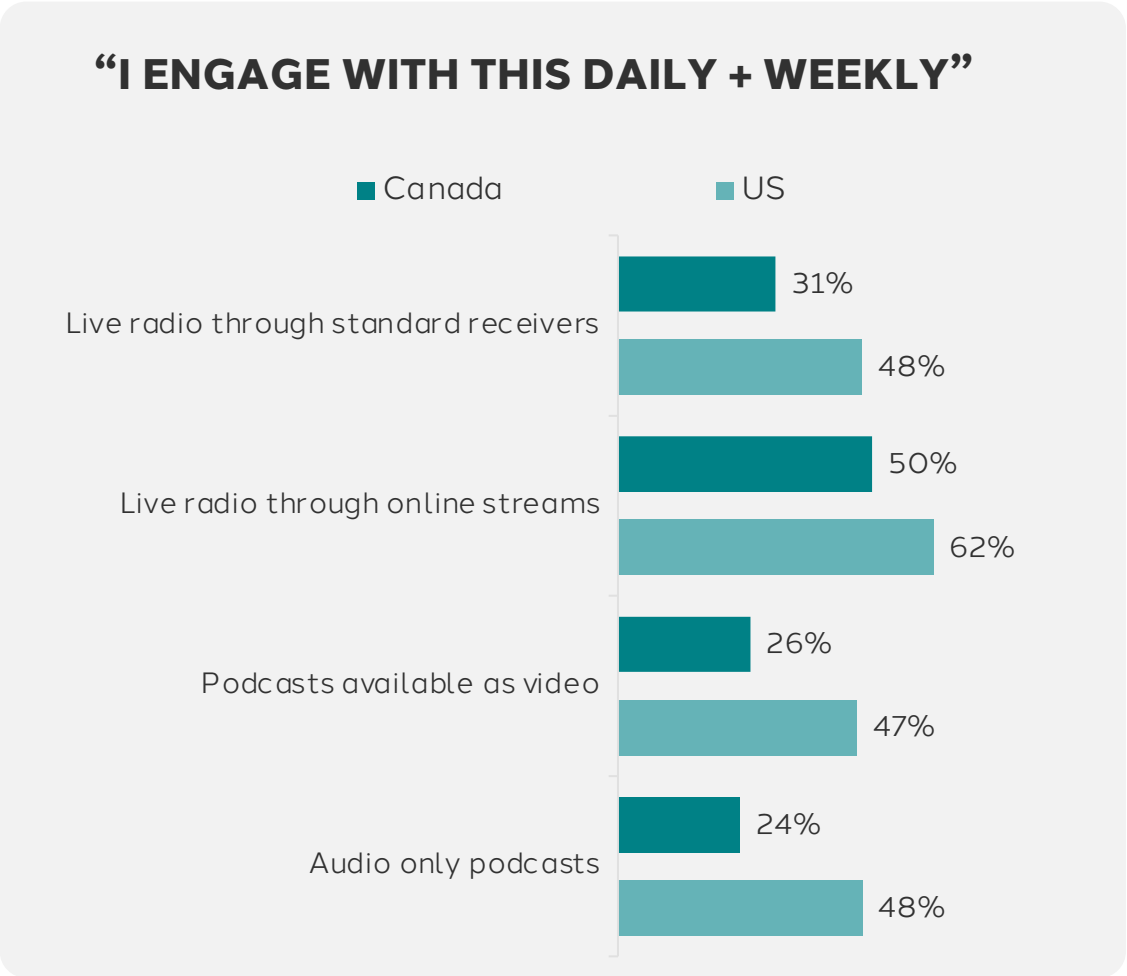
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU ENGAGE WITH THE FOLLOWING ENTERTAINMENT FORMATS?

■ Never
 ■ Once or twice a year
 ■ Every 3 to 6 months
 ■ Every couple of months
 ■ Monthly
 ■ Weekly
 ■ Daily



ENGAGEMENT WITH AUDIO FORMATS IS MOST FREQUENT IN THE US, BUT ALSO SIGNIFICANT IN CANADA

Gen Zers over-index on engaging with podcasts that are also available on video, while Millennials favor audio-only podcasts.



MOST LIKELY TO ENGAGE WITH DAILY WITH THE FORMAT

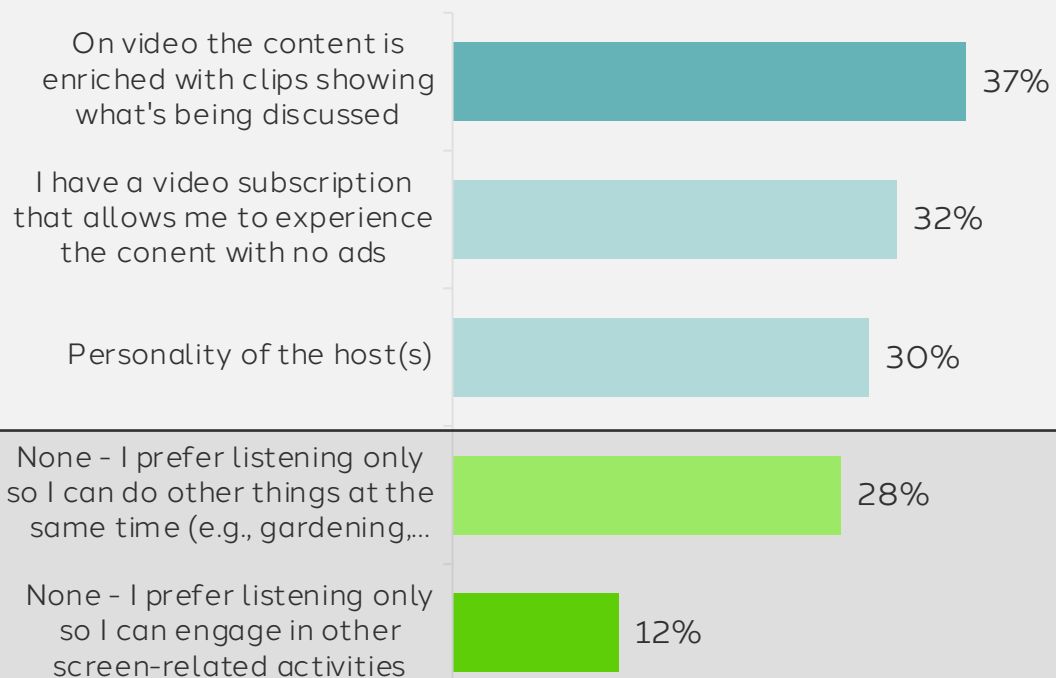
MEN	AUDIO ONLY PODCASTS (115i)
WOMEN	no over-indexation
GEN Z	PODCASTS AVAILABLE ON VIDEO (142i)
MILLENNIALS	AUDIO ONLY PODCASTS (169i)
GEN X	LIVE RADIO THROUGH STANDARD RECEIVERS (127i)
BOOMERS	no over-indexation



4 IN 10 CONSUMERS PREFER ENGAGING THROUGH AUDIO ALONE, EVEN IF VIDEO IS ALSO AVAILABLE

Visual clips enhancing the content are the most cited reason for watching podcasts and radio livestreams.

WHICH OF THE FOLLOWING WOULD LEAD YOU TO WATCH A PODCAST OR A RADIO LIVESTREAM INSTEAD OF JUST LISTENING?



WHERE COHORTS OVER-INDEX

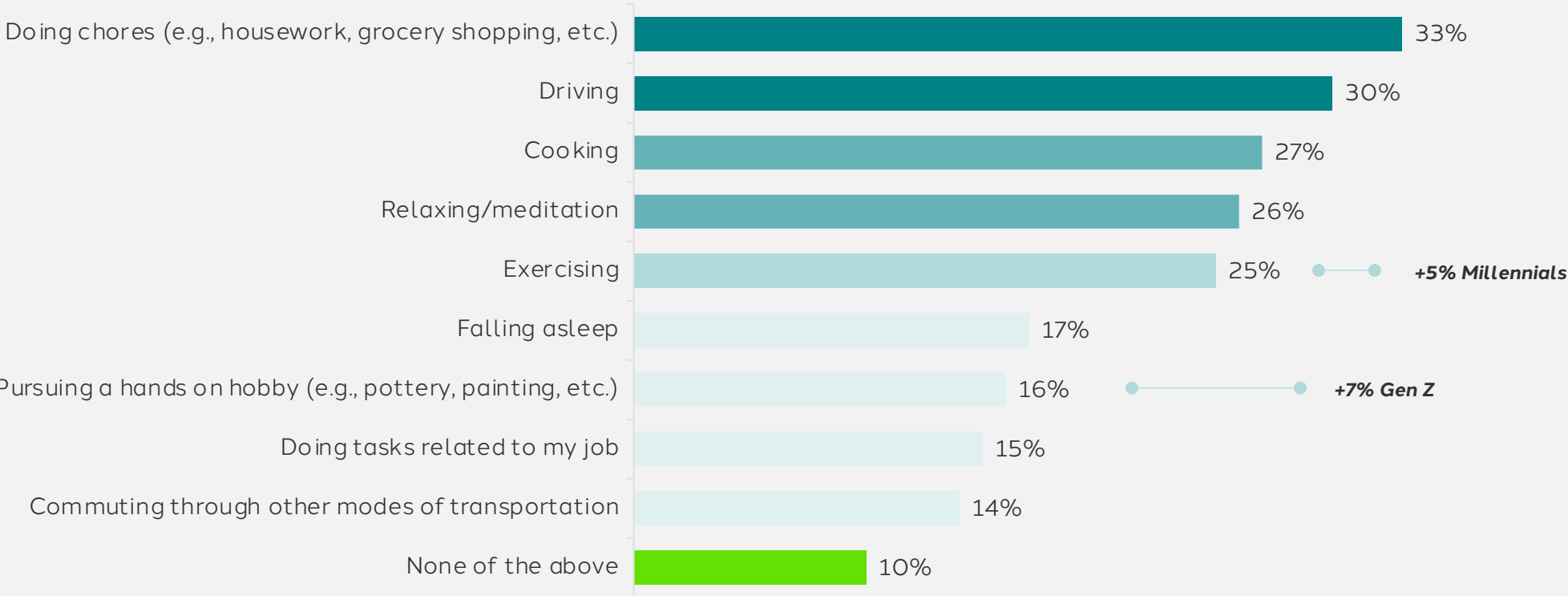
MEN	USING VIDEO SUBSCRIPTION TO AVOID ADS (115i)
WOMEN	NONE – SO I CAN ENGAGE IN OTHER THINGS (111i)
GEN Z	USING VIDEO SUBSCRIPTION TO AVOID ADS (147i)
MILLENNIALS	CONTEXTUAL VIDEO CLIPS (143i)
GEN X	NONE – SO I CAN ENGAGE IN OTHER SCREEN-BASED ACTIVITIES (112i)
BOOMERS	NONE – SO I CAN ENGAGE IN OTHER THINGS (186i)



CHORES AND COMMUTING ARE THE MOST OFTEN CITED ACTIVITIES THAT GET CARRIED OUT WHILE ENGAGING WITH AUDIO FORMATS

Millennials over-index on exercising, Gen Zers on craft-related hobbies.

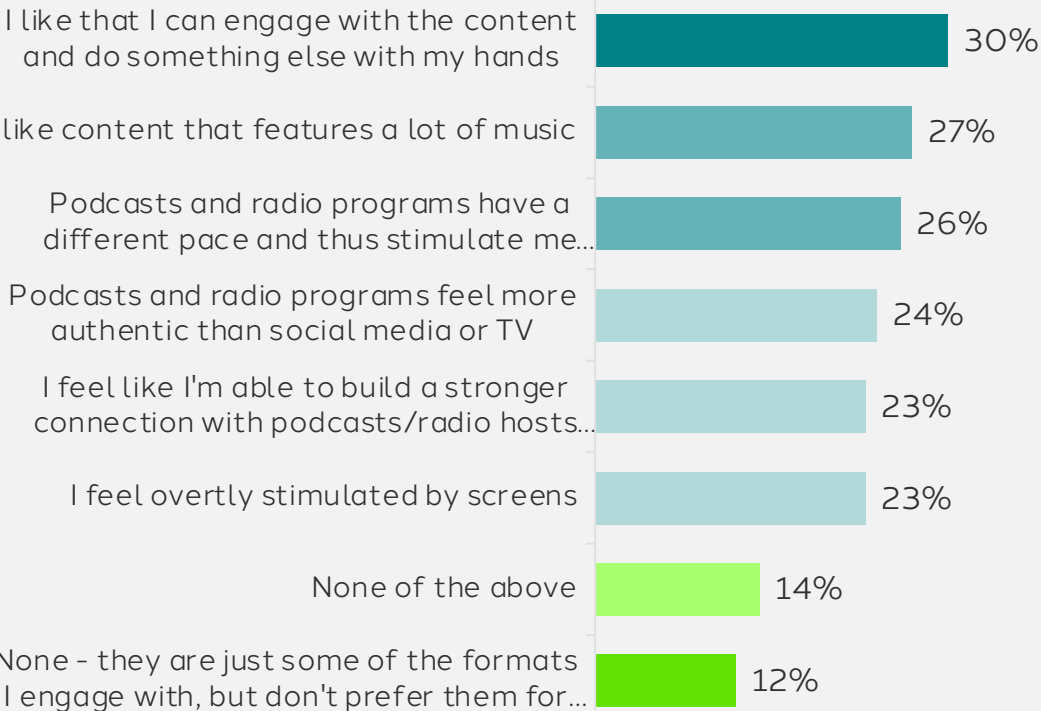
WHICH OF THE FOLLOWING DO YOU ENGAGE IN MOST FREQUENTLY WHILE LISTENING TO PODCASTS OR RADIO?



MULTITASKING AND MUSIC ARE THE TOP DRIVERS FOR PODCASTS AND RADIO PROGRAMS, BUT AUDIO IS ALSO PERCEIVED TO FEEL MORE AUTHENTIC

Gen Zers lean into audio formats because they feel over-stimulated by screens.

WHICH OF THE FOLLOWING LEAD YOU TO ENGAGE WITH PODCASTS OR RADIO PROGRAMS?



WHERE COHORTS OVER-INDEX

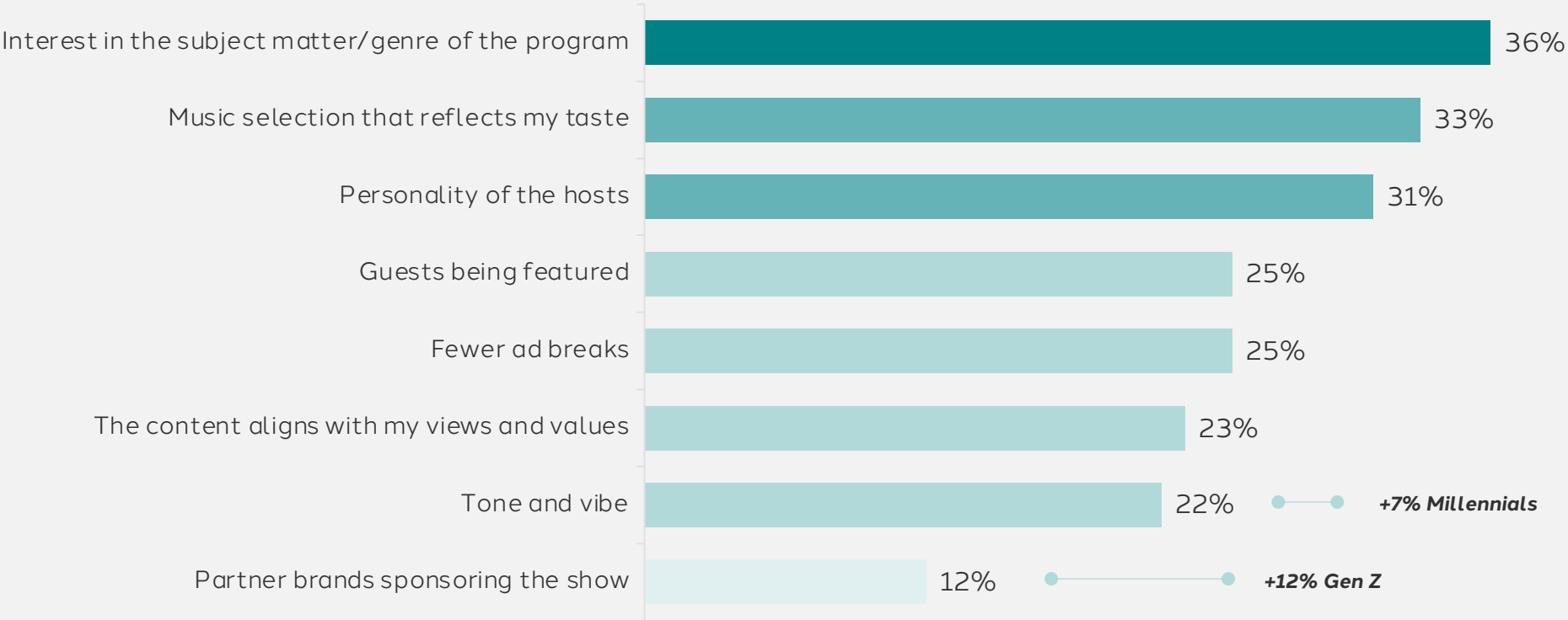
MEN	I FEEL OVER-STIMULATED BY SCREENS (113i)
WOMEN	I CAN ENGAGE WITH THE CONTENT AND DO OTHER THINGS (103i)
GEN Z	I FEEL OVER-STIMULATED BY SCREENS (148i)
MILLENNIALS	PODCASTS AND RADIO PROGRAMS FEEL MORE AUTHENTIC (133i)
GEN X	no over-indexation
BOOMERS	NONE – THEY ARE JUST SOME OF THE FORMATS I ENJOY (125i)



SUBJECT MATTER, MUSIC SELECTION AND HOSTS ARE THE TOP CRITERIA WHEN IT COMES TO AUDIO PROGRAM SELECTION

However, it's important to note that Gen Zers also choose programs based on the partner brands that are sponsoring them.

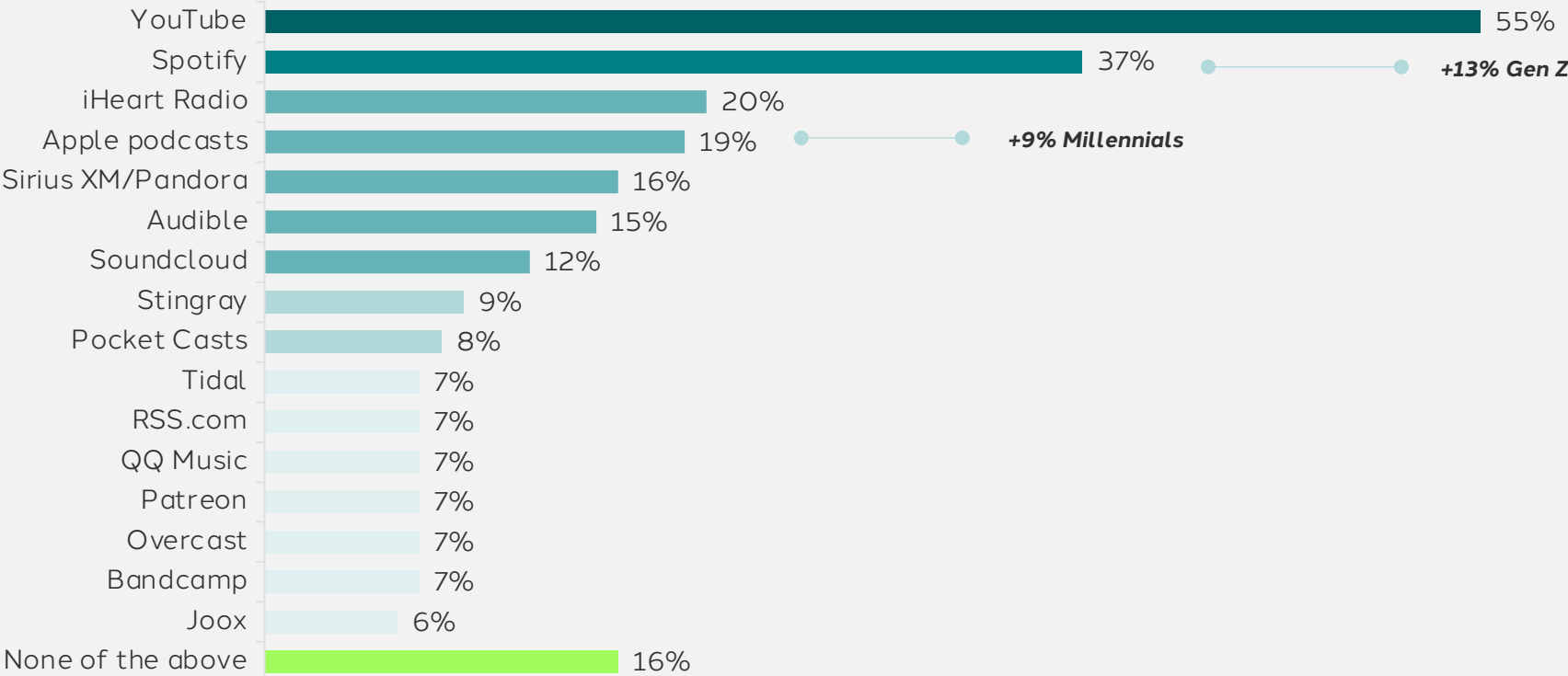
WHICH OF THE FOLLOWING CRITERIA ARE MOST IMPORTANT TO YOU WHEN CHOOSING A PODCAST OR RADIO PROGRAMS?



YOUTUBE, SPOTIFY, AND IHEART RADIO ARE THE MOST POPULAR PLATFORMS TO EXPERIENCE AUDIO FORMATS

Millennials are partial to Apple Podcasts.

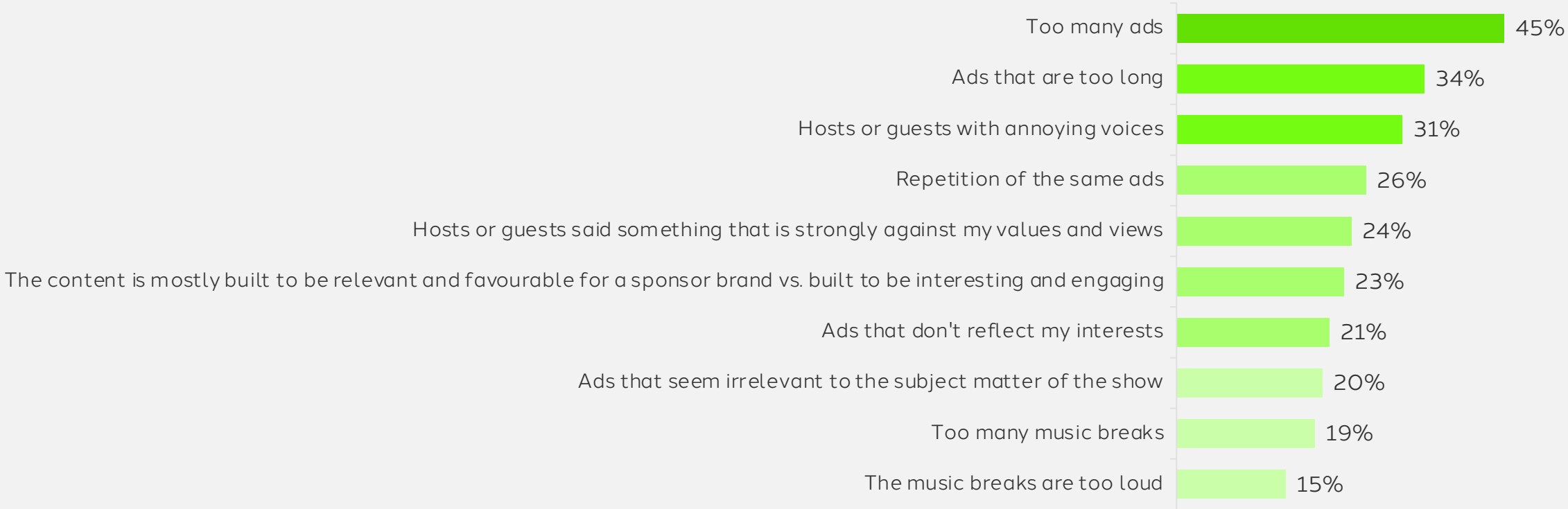
WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO EXPERIENCE PODCASTS OR STREAMING RADIO CONTENT?



OVER-EXPOSURE TO ADS AND AD REPETITION ARE BIG TURN OFFS FOR LISTENERS

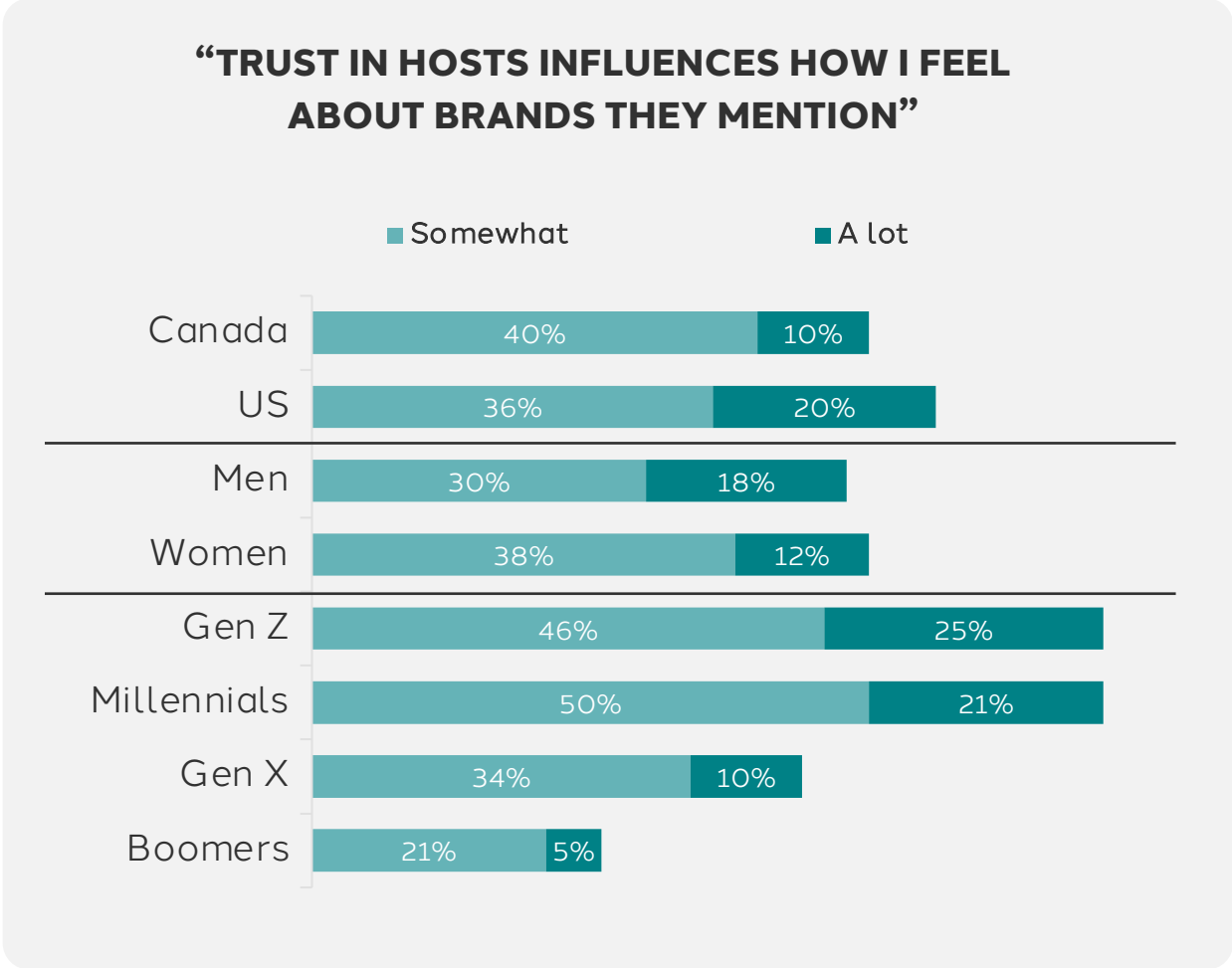
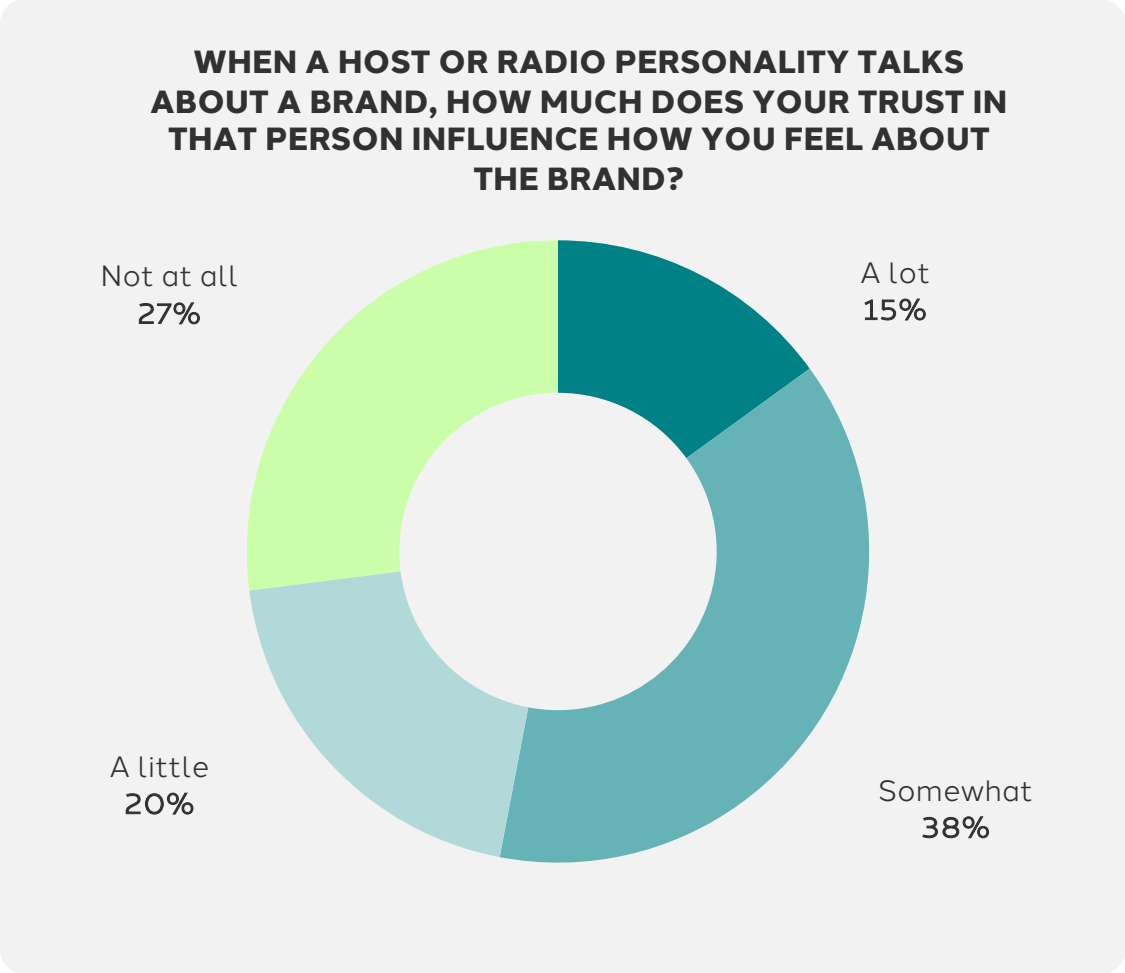
Music is rarely cited as a reason for switching off or switching stations.

WHICH OF THE FOLLOWING IS MOST LIKELY TO MAKE YOU STOP LISTENING, SWITCH STATIONS, OR SKIP AHEAD?



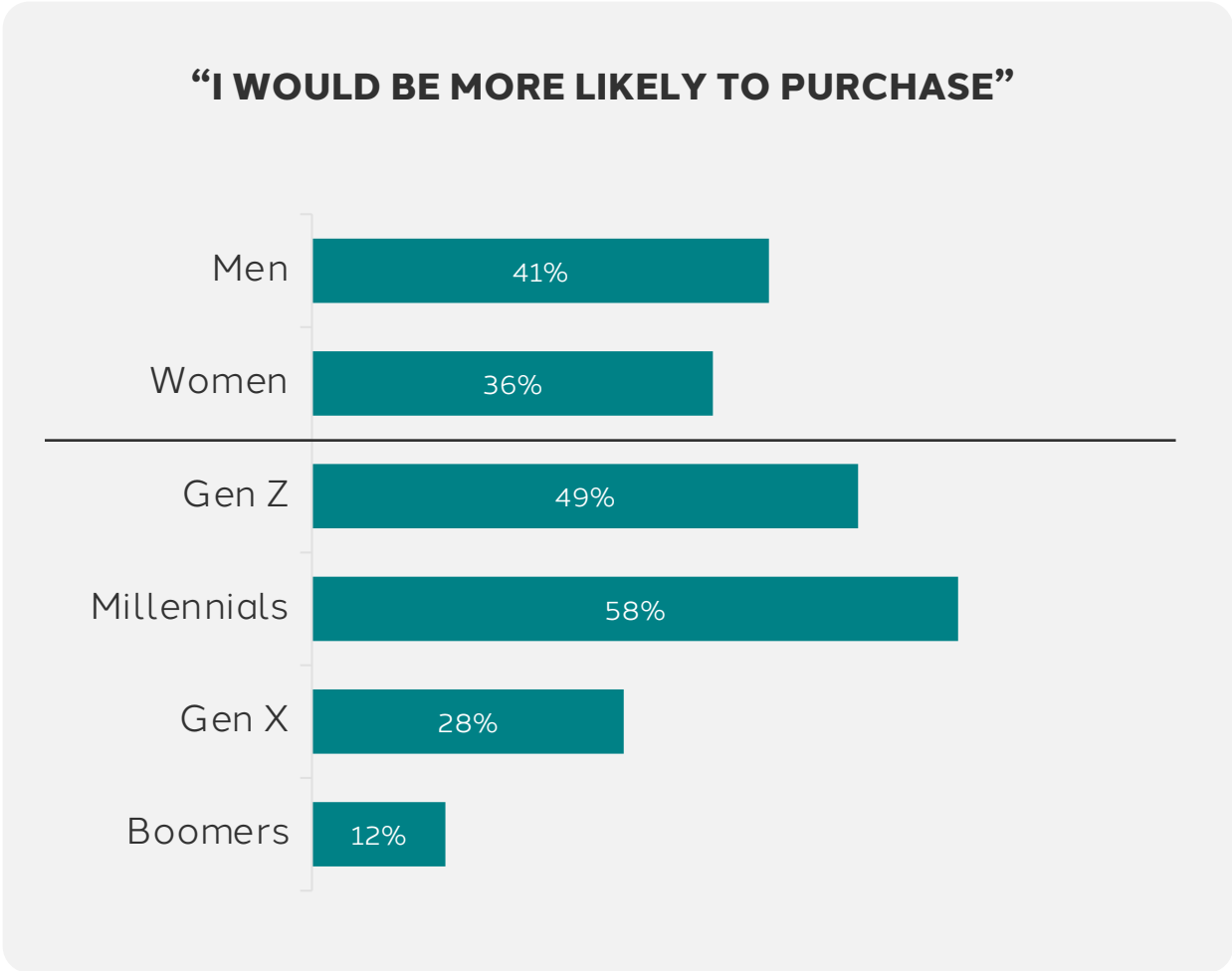
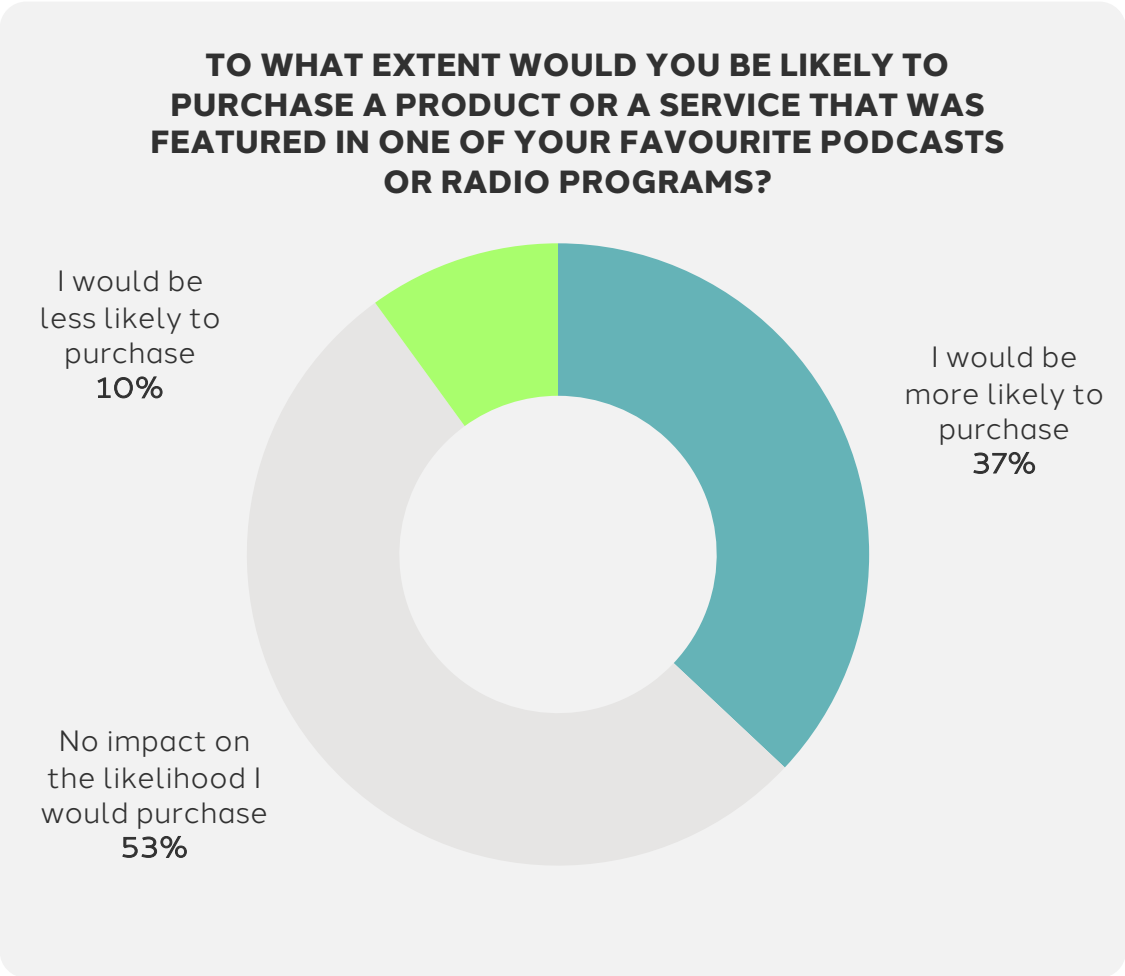
MOST CONSUMERS SAY THEIR OPINIONS ON BRANDS ARE INFLUENCED BY THE HOSTS THEY TRUST

Gen Zers and Millennials are most likely to report they are influenced significantly.



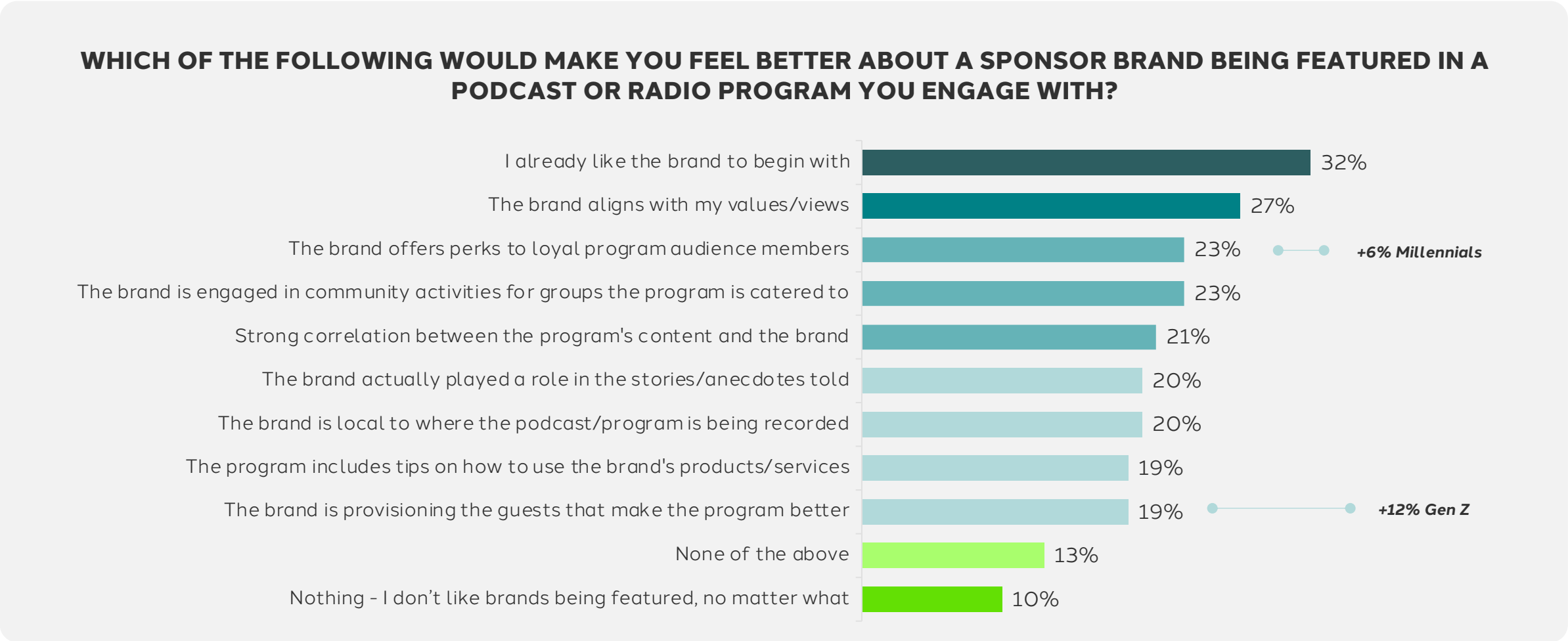
BRAND INTEGRATIONS INTO PODCASTS AND RADIO PROGRAMS HAVE A POSITIVE IMPACT ON SALES

Almost 4 in 10 say they are more likely to purchase featured products and services.



BRAND VALUES AND PERKS TO LISTENERS IMPROVE CONSUMER PERCEPTION OF BRAND-SPONSORED AUDIO CONTENT

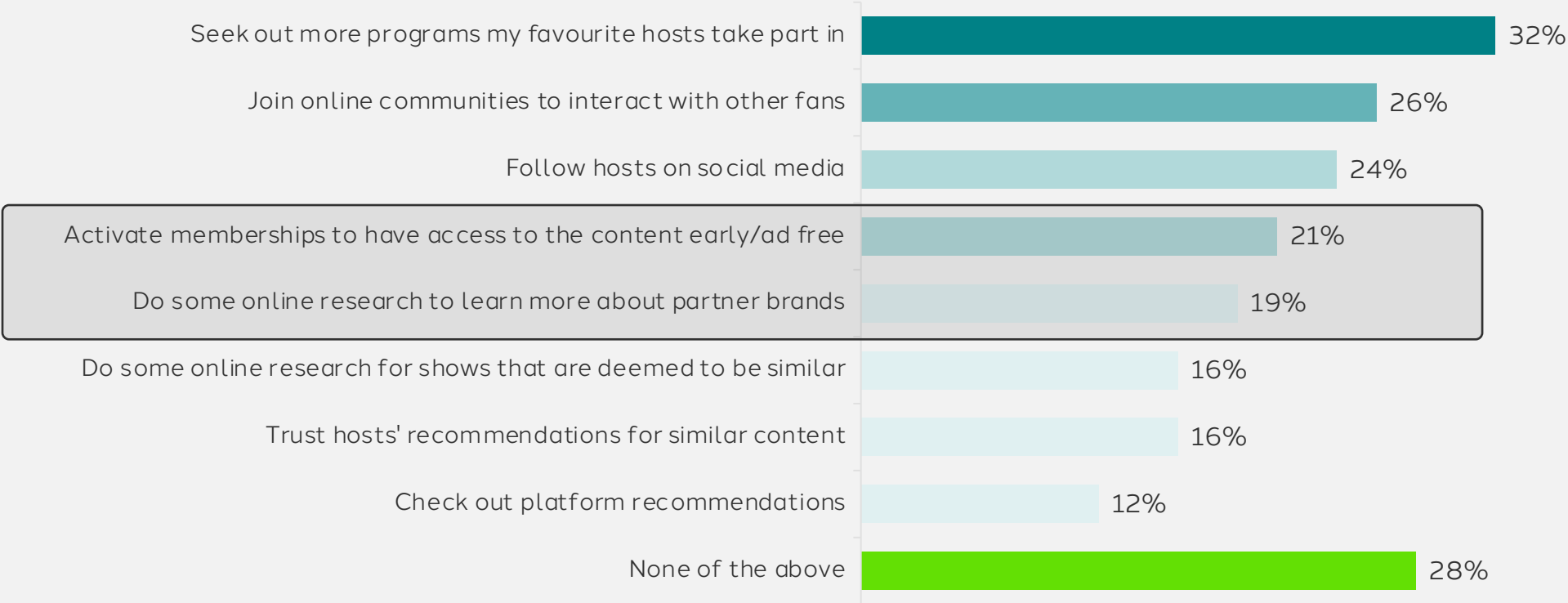
However, connectivity between the brand and the content is also critical.



ENGAGEMENT WITH AUDIO FORMATS INFORM ACTIVITIES ACROSS THE ENTIRE MEDIA ECOSYSTEM

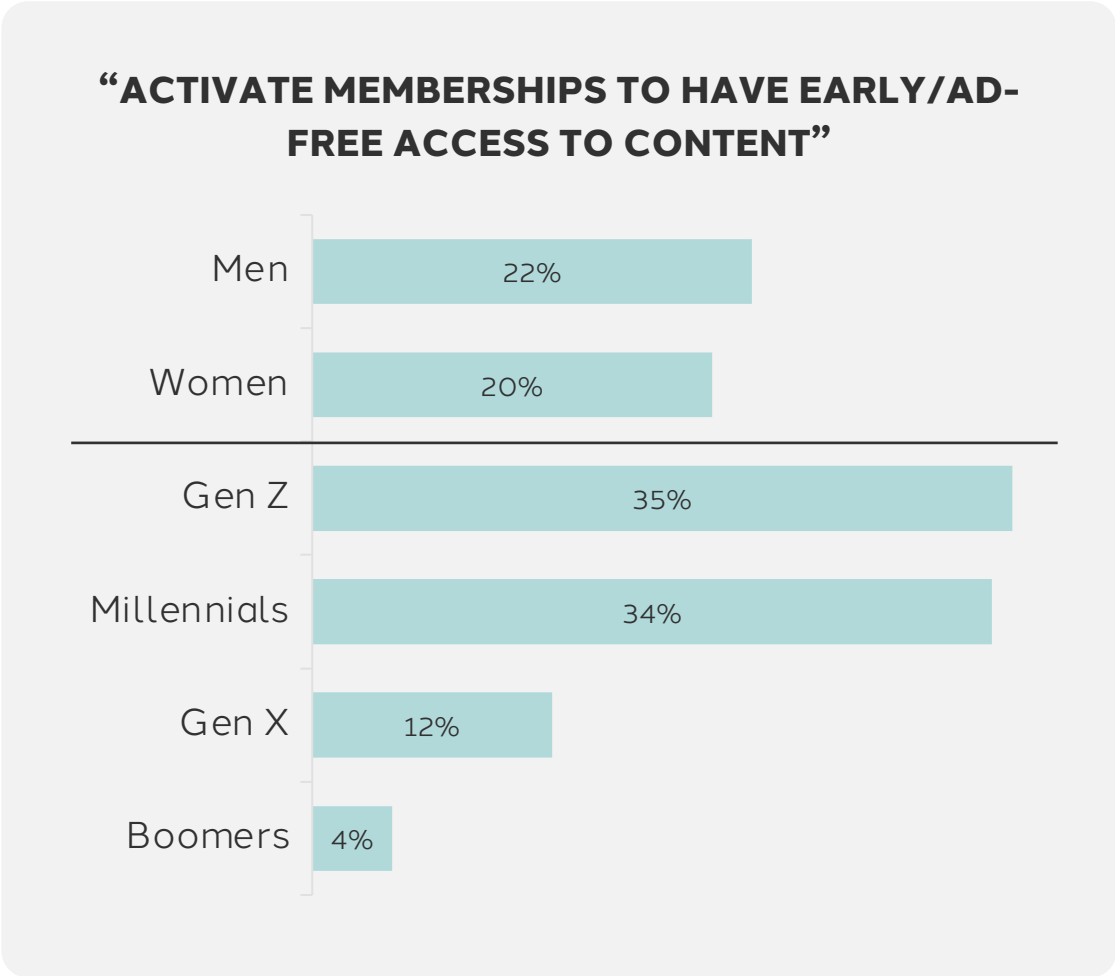
1 in 5 consumers activate memberships to have early access to content and research featured brands online.

WHICH OF THE FOLLOWING ACTIVITIES DO YOU ENGAGE IN WHEN YOU LIKE A PODCAST OR RADIO PROGRAM?



YOUNGER COHORTS ARE MORE LIKELY TO LEAN IN FURTHER

Gen Zers are more likely to activate memberships for early or ad-free access to content and to research the brands that are being featured.



IMPLICATIONS FOR MARKETERS

AUDIO FORMATS ARE A PERVASIVE PRESENCE IN CONSUMERS' DAY-TO-DAY THAT BRANDS MUST TAKE ADVANTAGE OF

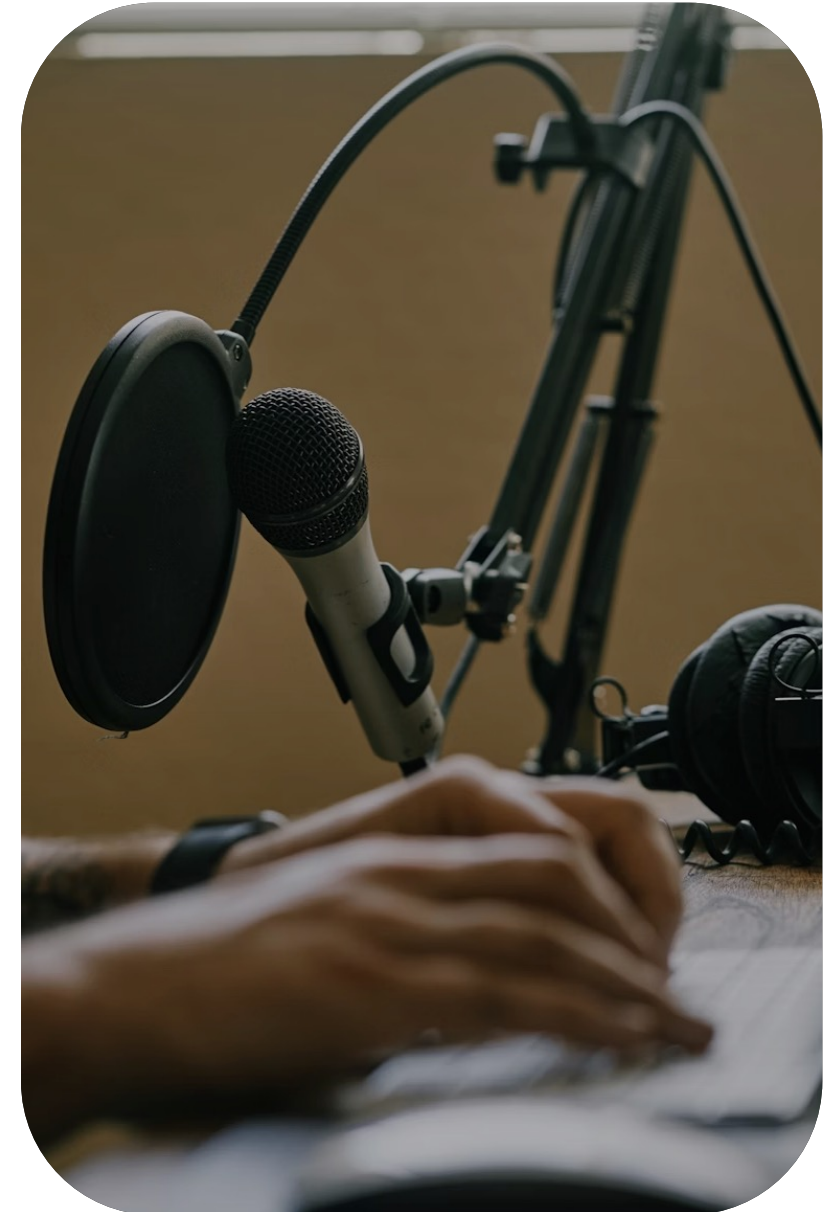
Whether it is because of multi-tasking, screen-fatigue, or the desire to immerse themselves in a content format that stimulates them in a different way, consumers are reporting very frequent engagement with audio or hybrid (audio that can also be experienced as video) formats. This represents a huge opportunity for brands to garner their attention without competing with all the content they are exposed to visually.

PODCASTS AND RADIO HOSTS ARE SUPER-INFLUENCERS THAT CAN MAKE OR BREAK CONSUMERS' TRUST IN A BRAND

Given the frequency of the engagement, the level of authenticity and authority listeners assign to audio content, and the level of trust that is granted to them, hosts often become an everyday companion in consumers' lives. They have major pull on their listeners when they speak about brands (and about other programs), so businesses should start thinking about them as influencers with a built-in brand integration playbook (provided by their network or platform of choice).

'ORGANIC' INTEGRATIONS ARE MORE LIKELY TO BE SUCCESSFUL

Consumers respond better to brand integrations into audio formats when there is a strong connection point between the brand's history and/or value proposition to the content or to the community the program caters to. Start with the programs that live in close proximity to your brand, either geographically or thematically.



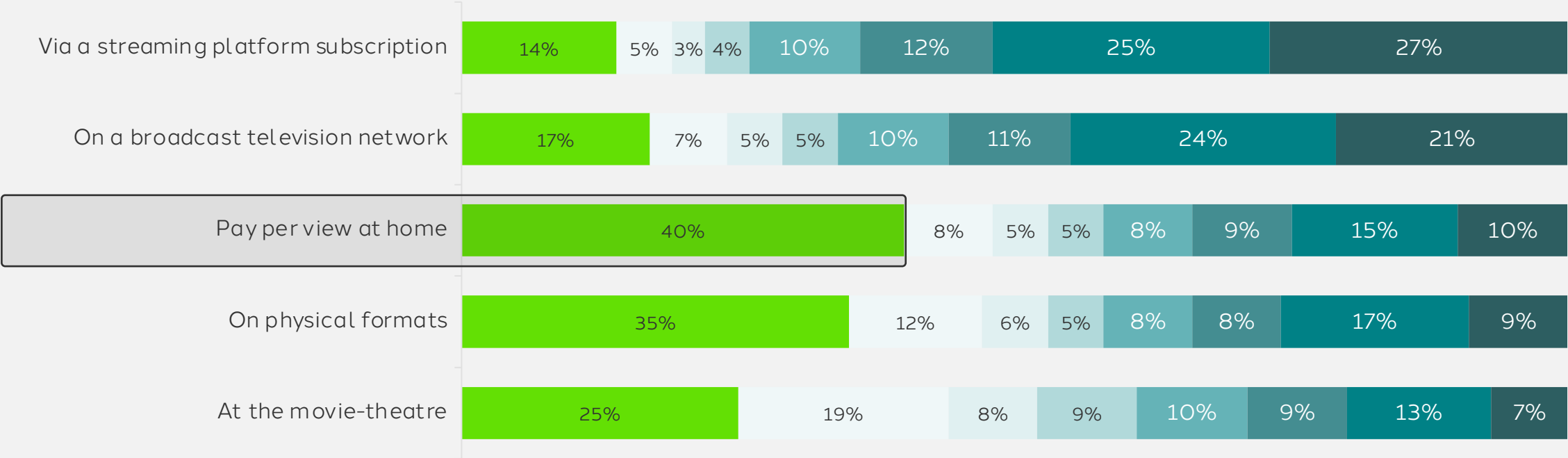
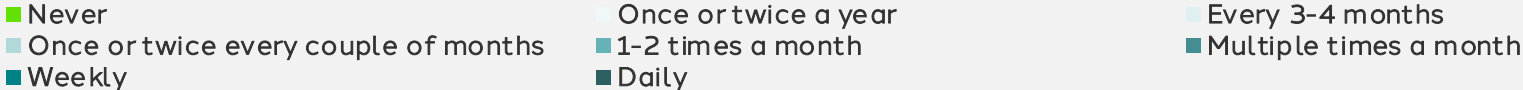
THE EVOLVING LANDSCAPE OF AUDIOVISUAL ENTERTAINMENT CONSUMPTION



STREAMING SERVICES ARE THE PREFERRED VIEWING AVENUE FOR FEATURE LENGTH MOVIES, FOLLOWED BY BROADCAST TV

Pay per view is the option that is most likely to be altogether avoided.

HOW OFTEN DO YOU WATCH FEATURE LENGTH MOVIES IN THE FOLLOWING WAYS?



GEN ZERS ARE TWICE AS LIKELY TO WATCH MOVIES IN THE THEATRE THAN THE AVERAGE CONSUMER

Boomers are least likely to go watch movies in person.

MOST LIKELY WAY TO WATCH FEATURE LENGTH MOVIES OFTEN

MEN PAY PER VIEW AT HOME (120i)

WOMEN STREAMING SUBSCRIPTION (107i)

GEN Z AT THE MOVIE THEATRE (200i)

MILLENNIALS PAY PER VIEW AT HOME (170i)

GEN X no over-indexation

BOOMERS no over-indexation

LEAST LIKELY WAY TO WATCH FEATURE LENGTH MOVIES EVER

MEN no over-indexation

WOMEN ON BROADCAST TV (123i)

GEN Z ON BROADCAST TV (106i)

MILLENNIALS no over-indexation

GEN X ON PHYSICAL FORMATS (114i)

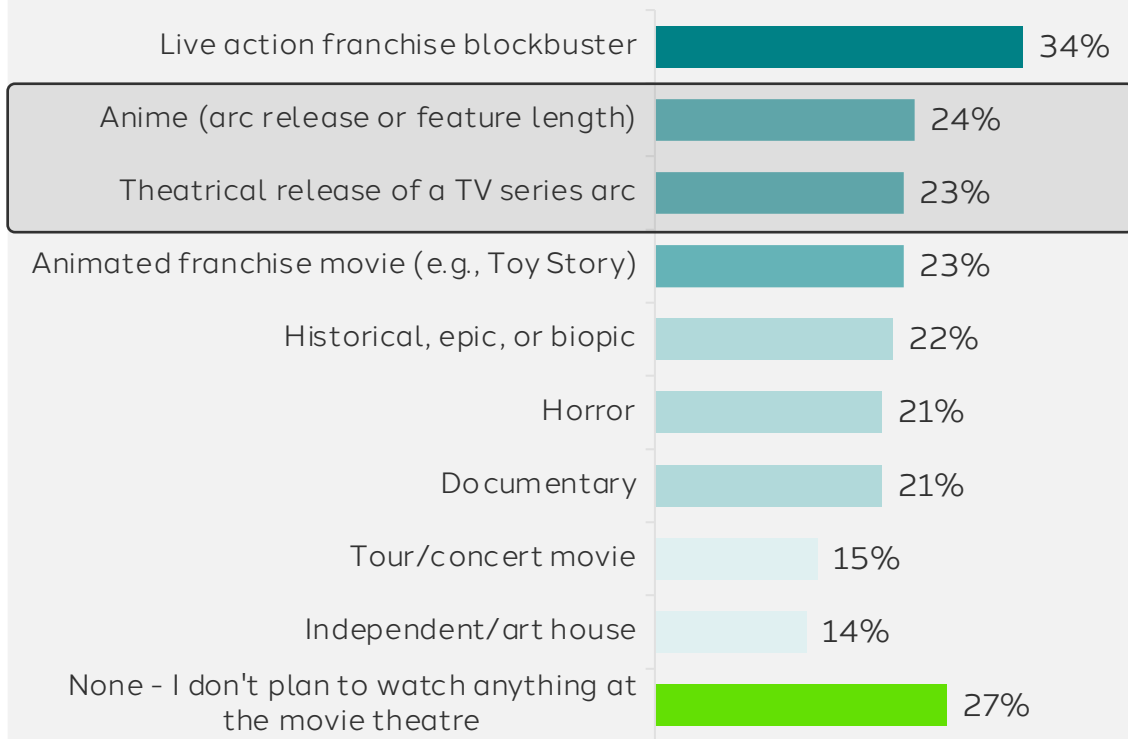
BOOMERS AT THE MOVIE THEATRE (184i)



THEATRICAL RELEASES OF ANIME AND TV SERIES ARCS ARE TRANSFORMING THE MOVIE-GOING EXPERIENCE

Men and Gen Zers drive interest in anime at the movies. Unsurprisingly, franchise blockbusters are still the #1 choice across the board.

WHICH OF THE FOLLOWING TYPES OF MOVIES DO YOU PLAN TO GO WATCH AT THE MOVIE THEATRE IN THE NEXT 12 MONTHS?



WHERE COHORTS OVER-INDEX

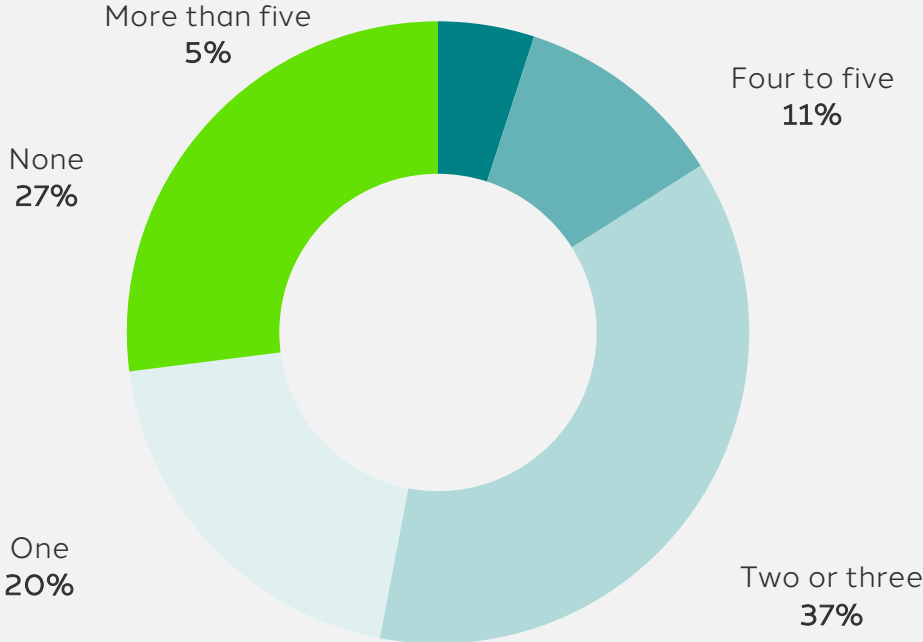
MEN	ANIME (123i)
WOMEN	THEATRICAL RELEASE OF A TV SERIES ARC (102i)
GEN Z	ANIME (200i)
MILLENNIALS	INDEPENDENT/ART HOUSE FILM (143i)
GEN X	LIVE ACTION FRANCHISE BLOCKBUSTER (107i)
BOOMERS	none / stating at home (192i)



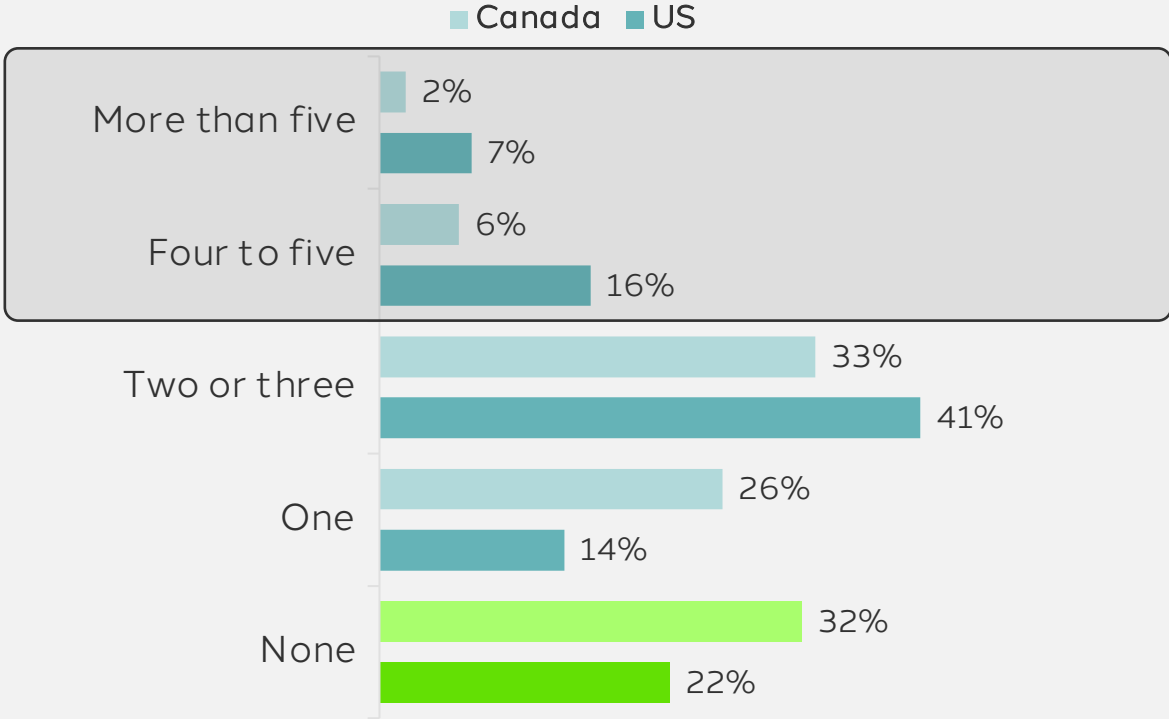
US CONSUMERS SPLURGE ON A HIGHER NUMBER OF STREAMING SUBSCRIPTIONS TO WATCH TV SHOWS COMPARED TO CANADIANS

23% of respondents in the US say they use upwards of four subscriptions. The share lowers to 8% in Canada.

HOW MANY STREAMING SUBSCRIPTION DO YOU CURRENTLY PAY FOR SPECIFICALLY FOR THE PURPOSE OF WATCHING LIVE ACTION TV SERIES?



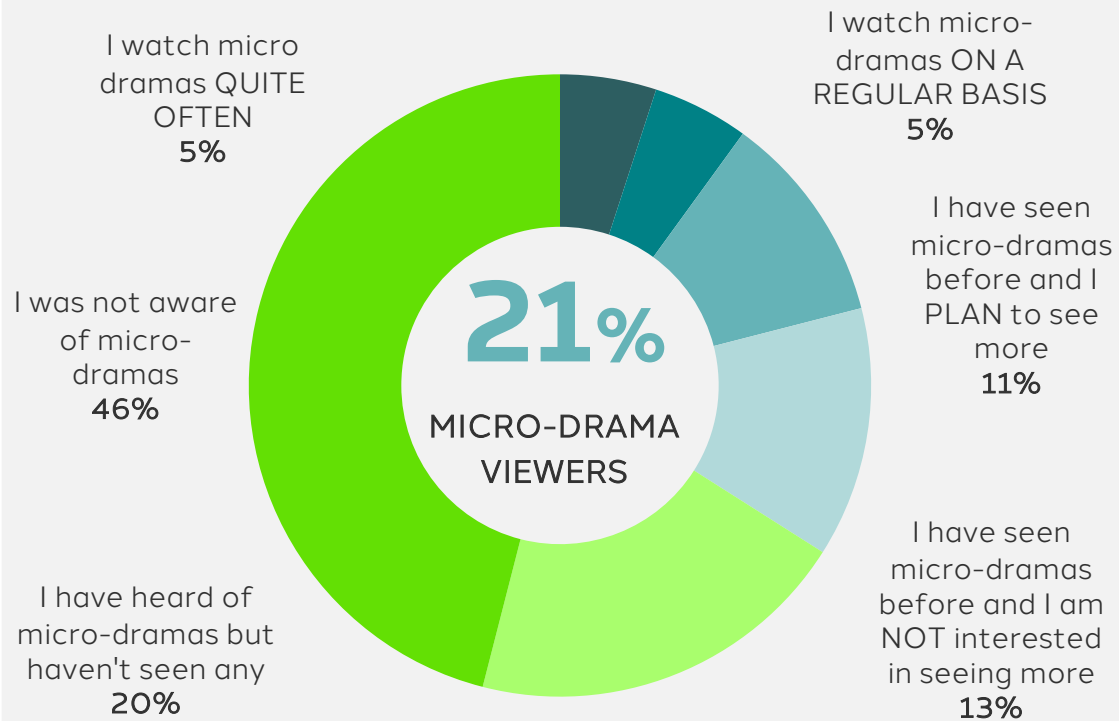
OF SUBSCRIPTION PURCHASED TO WATCH TV SERIES



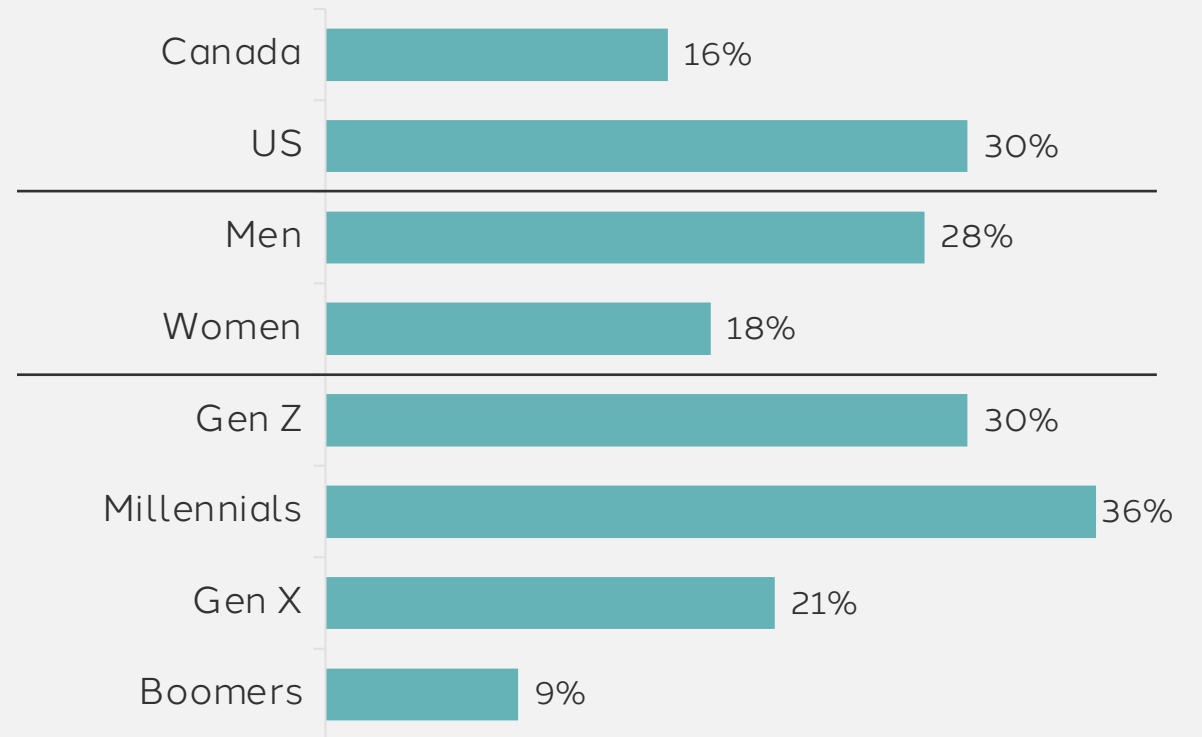
1 IN 5 NORTH AMERICAN CONSUMERS WATCH MICRO-DRAMAS

Viewership for this emerging form of serialized short video series is higher among US respondents, Gen Zers, Millennials.

WHICH OF THE FOLLOWING BEST REFLECTS YOUR ENGAGEMENT WITH MICRO-DRAMAS?

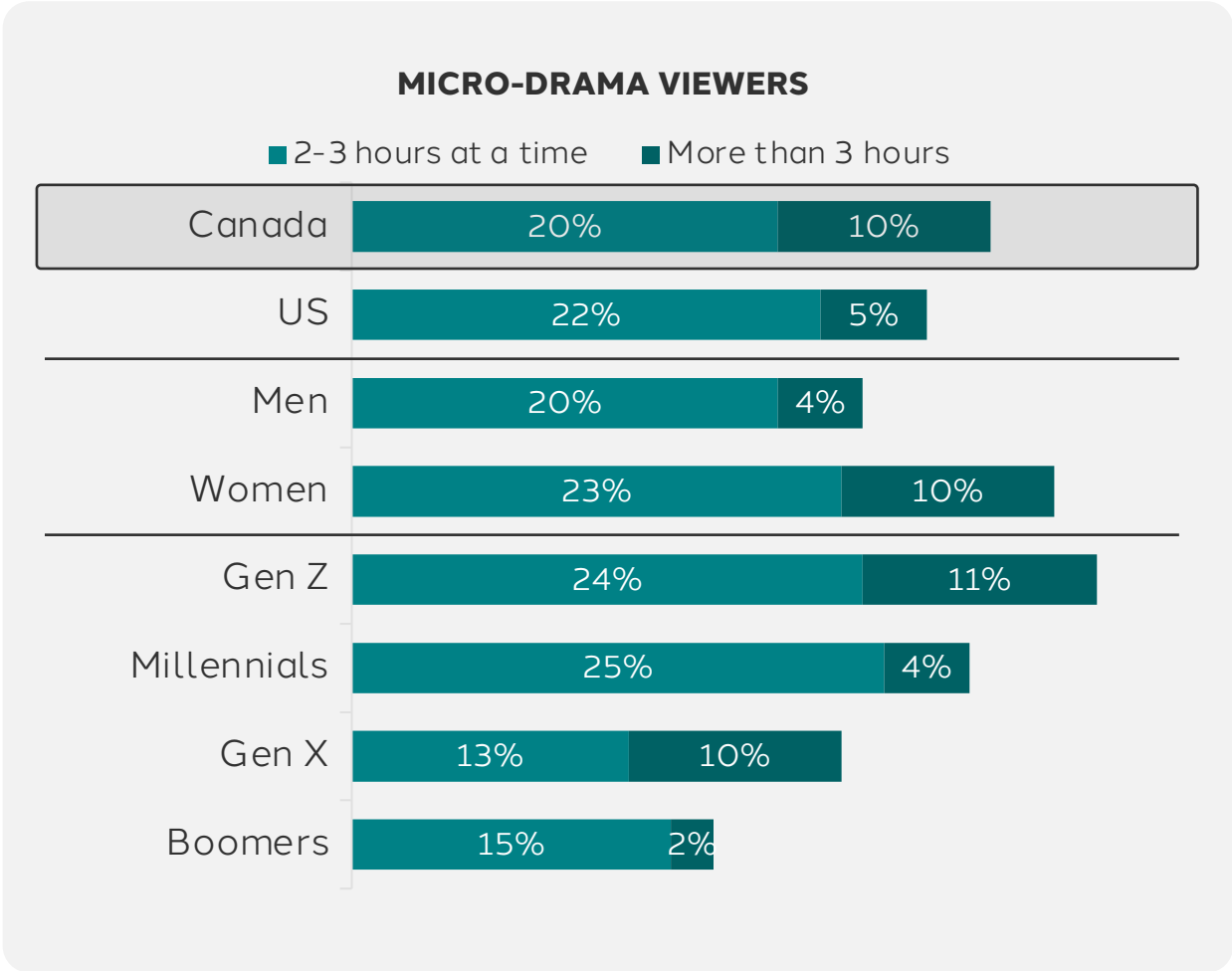
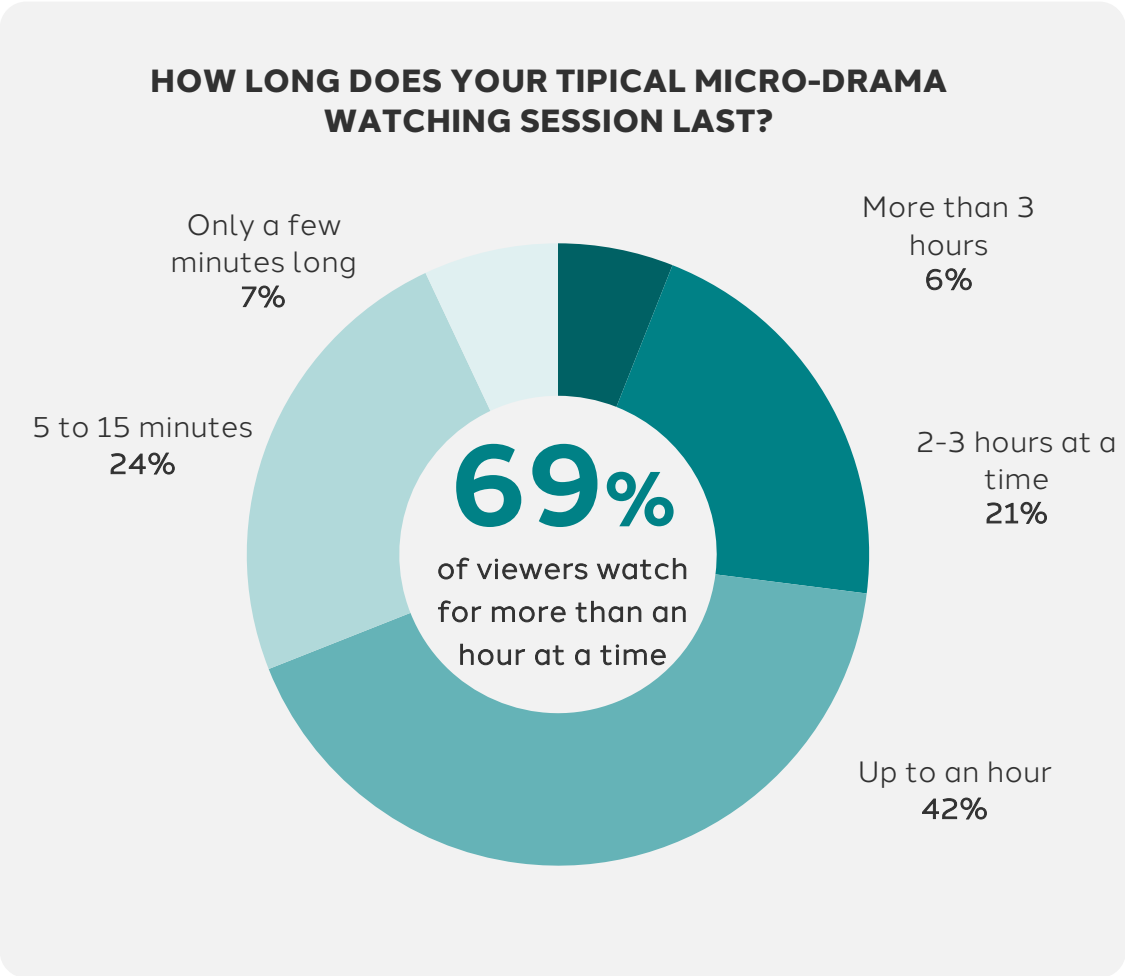


MICRO-DRAMA VIEWERS



MOST MICRO-DRAMA VIEWERS WATCH IN SESSIONS THAT LAST UPWARDS OF AN HOUR

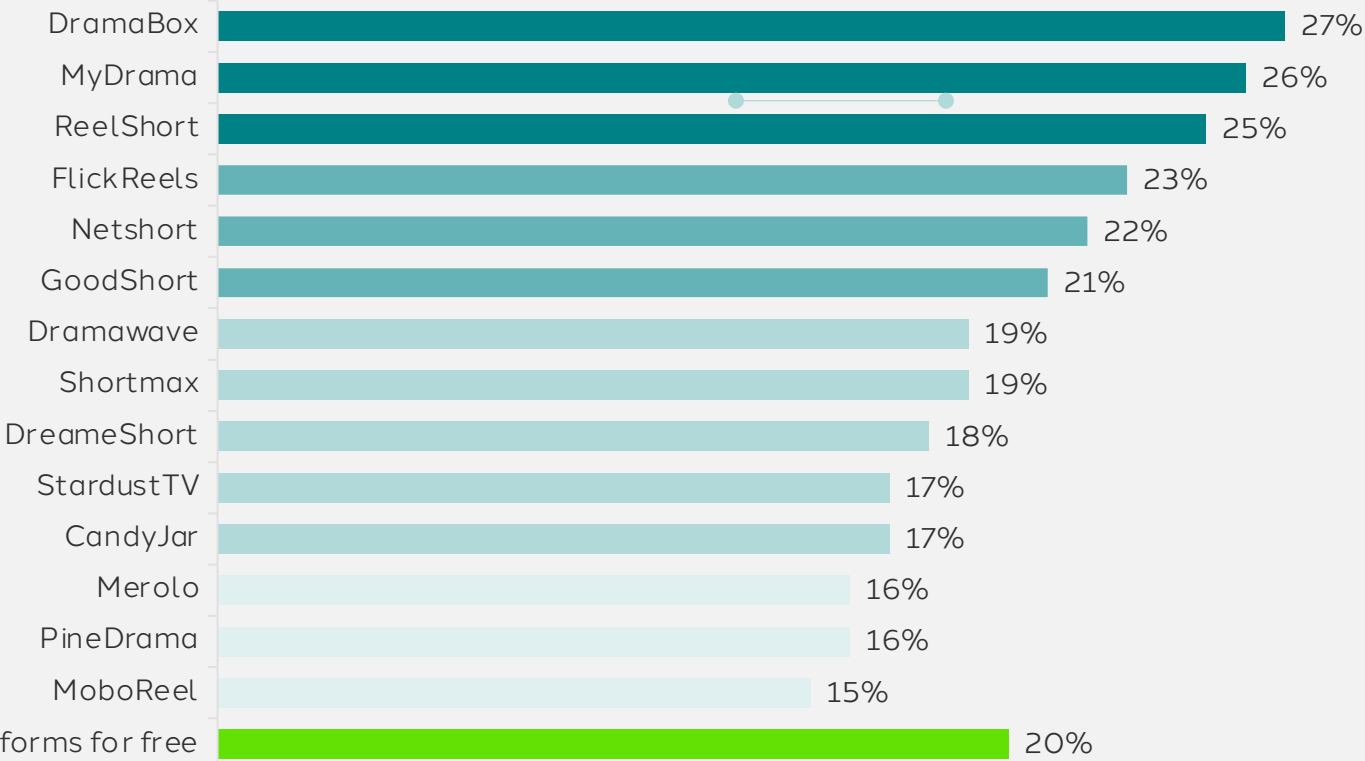
While there are fewer viewers in Canada, those who engage with micro-dramas do so for longer sessions.



DRAMABOX, MYDRAMA, AND REELSHORT ARE THE MOST POPULAR DEDICATED PLATFORMS FOR MICR—DRAMA VIEWING

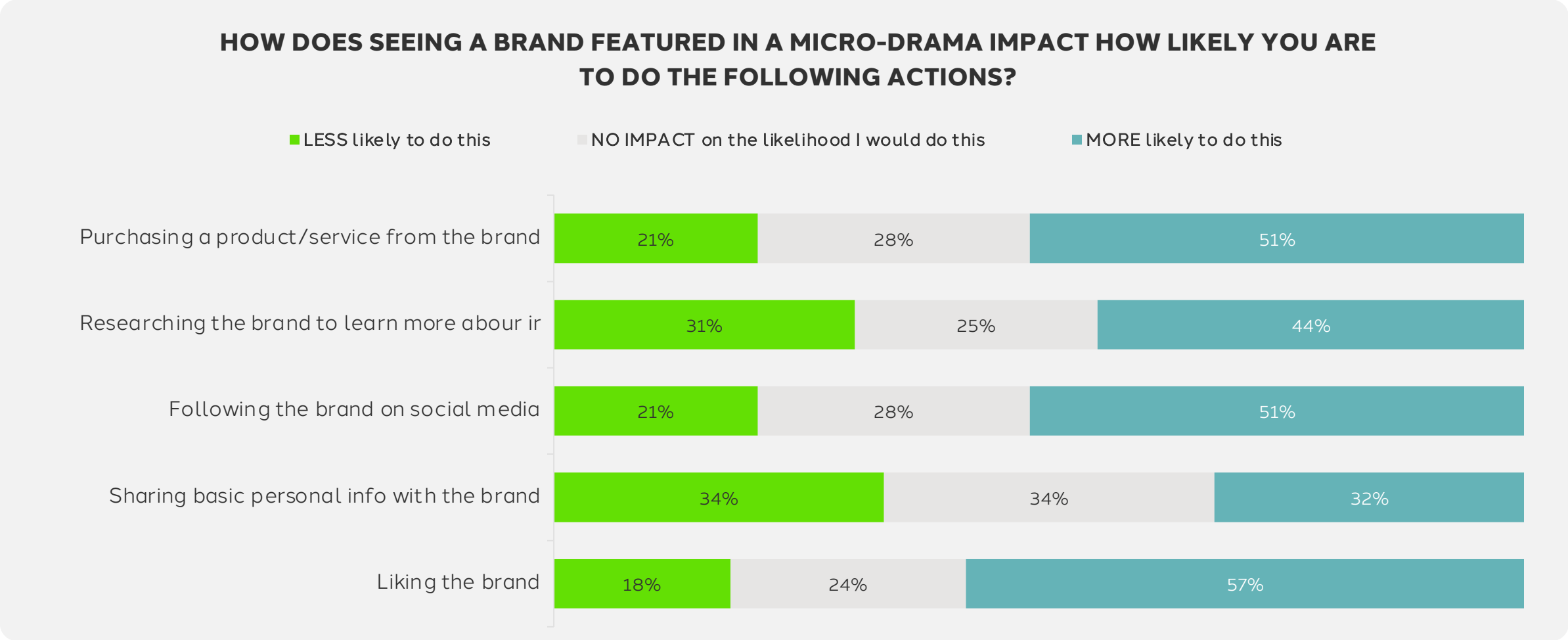
However, 20% of viewers say they only watch the micro-drama content that is available for free on social platforms.

WHICH OF THE FOLLOWING PLATFORMS HAVE YOU SUBSCRIBED TO SPECIFICALLY TO WATCH MICRO-DRAMAS?



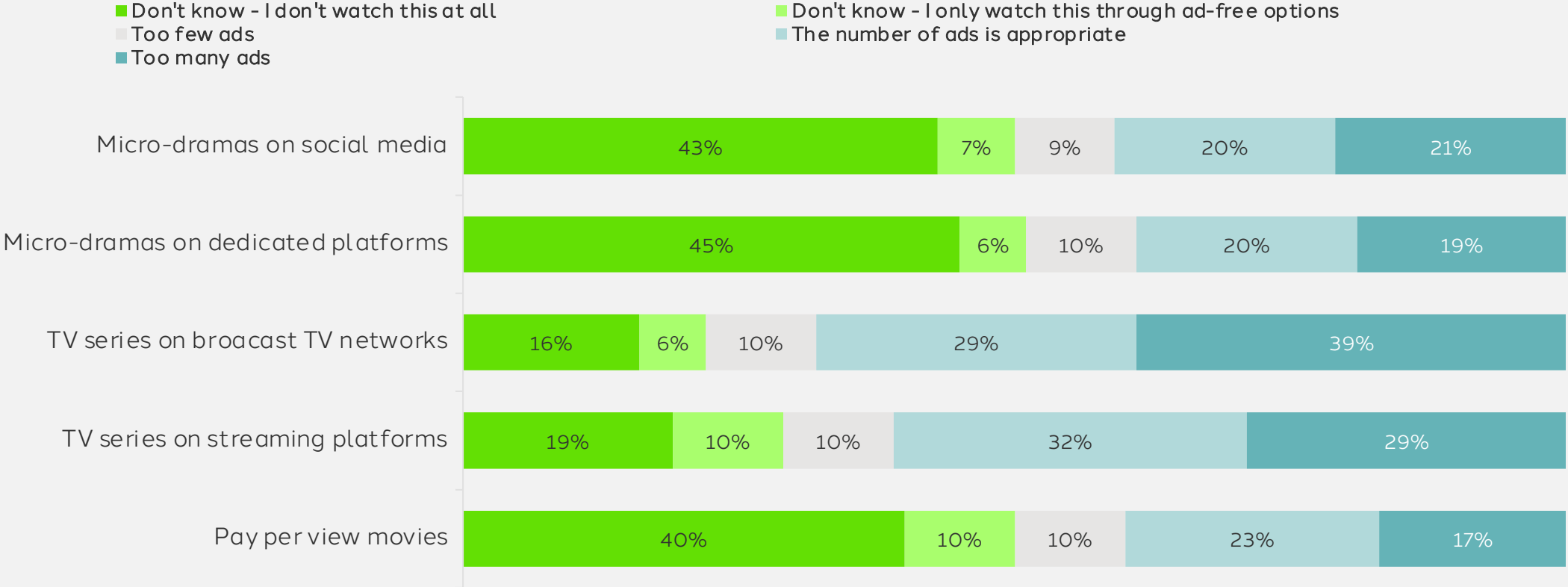
BEING FEATURED IN MICRO-DRAMA CONTENT HAS A POSITIVE IMPACT FOR BRANDS, ACROSS MULTIPLE DIMENSIONS

Viewers are more likely to like, follow, and purchase brands they see featured in micro-dramas.



VIEWERS ARE LARGELY OK WITH THE NUMBER OF ADS THEY ARE EXPOSED TO WHEN WATCHING MICRO-DRAMAS, BUT FRUSTRATED BY OVER-EXPOSURE TO ADS ON TV NETWORKS AND STREAMING PLATFORMS

HOW DO YOU FEEL ABOUT ADS WHEN IT COMES TO THE FOLLOWING AUDIO-VISUAL FORMATS?

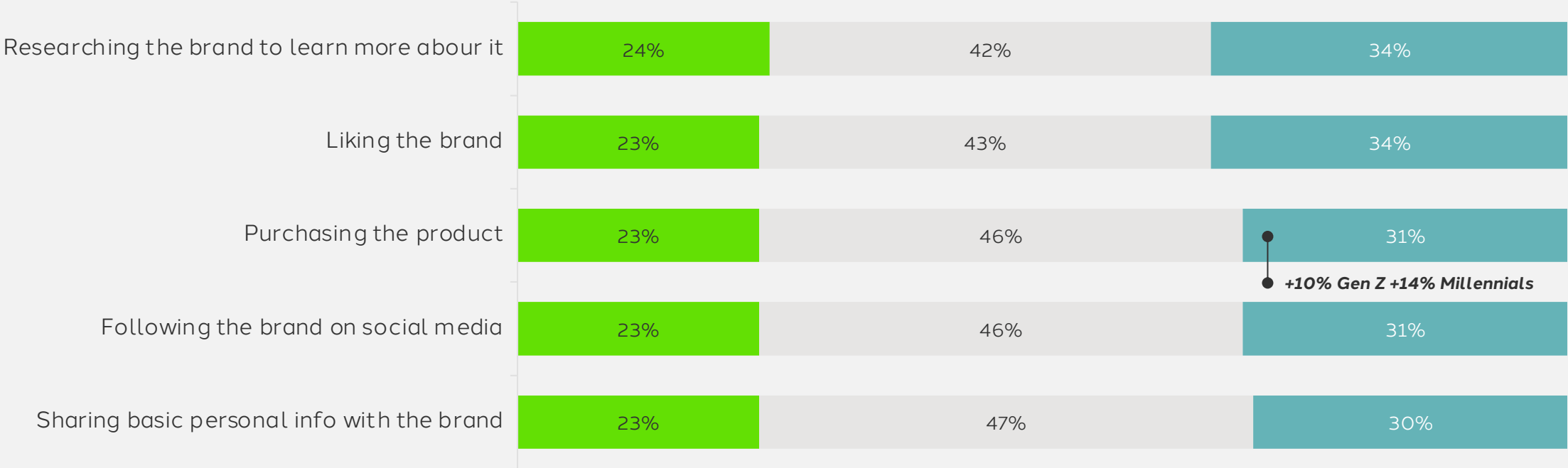


IP PARTNERSHIPS INTO ENTERTAINMENT HAVE A POSITIVE IMPACT FOR BRANDS, WITH 3 IN 10 CONSUMERS MORE LIKELY TO FOLLOW AND PURCHASE

The share of those saying they would be more likely to purchase is even higher among Gen Zers and Millennials.

HOW DOES SEEING YOUR FAVORITE ENTERTAINMENT FRANCHISE/CHARACTER/CELEBRITY ON A PRODUCT IMPACT HOW LIKELY YOU ARE TO DO THE FOLLOWING ACTIONS?

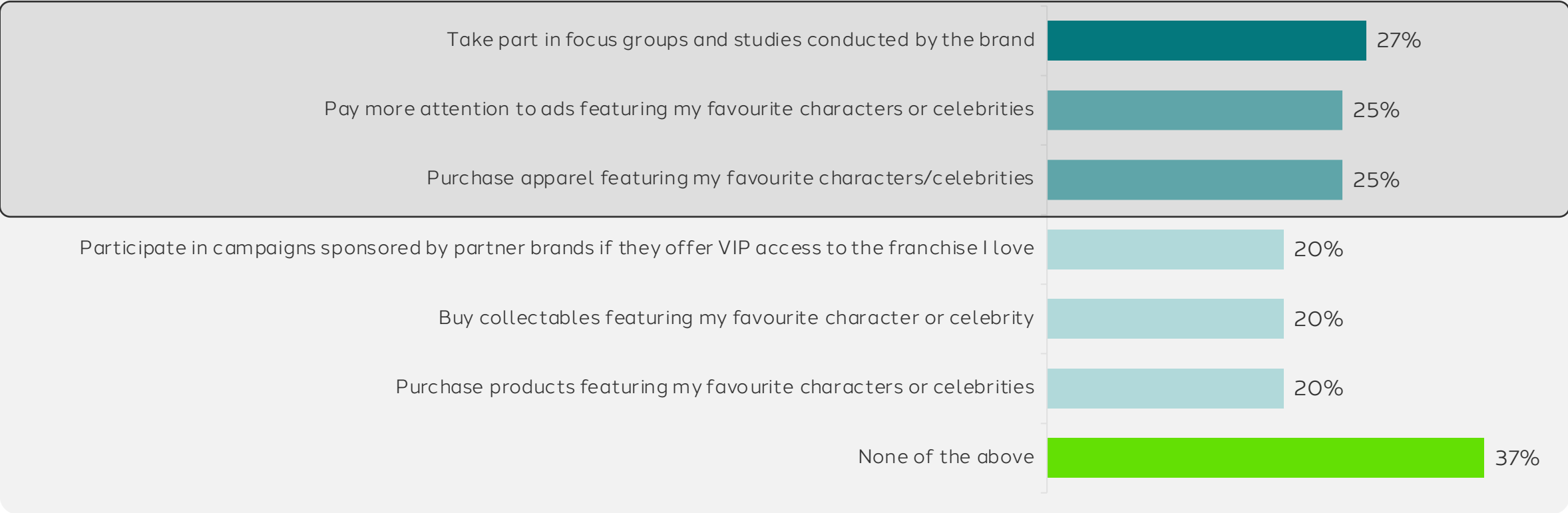
■ LESS likely to do this ■ NO IMPACT on the likelihood I would do this ■ MORE likely to do this



IP PARTNERSHIPS ARE A LEVER BRANDS CAN USE TO GARNERING MORE ENGAGEMENT AND INSIGHTS FROM CONSUMERS

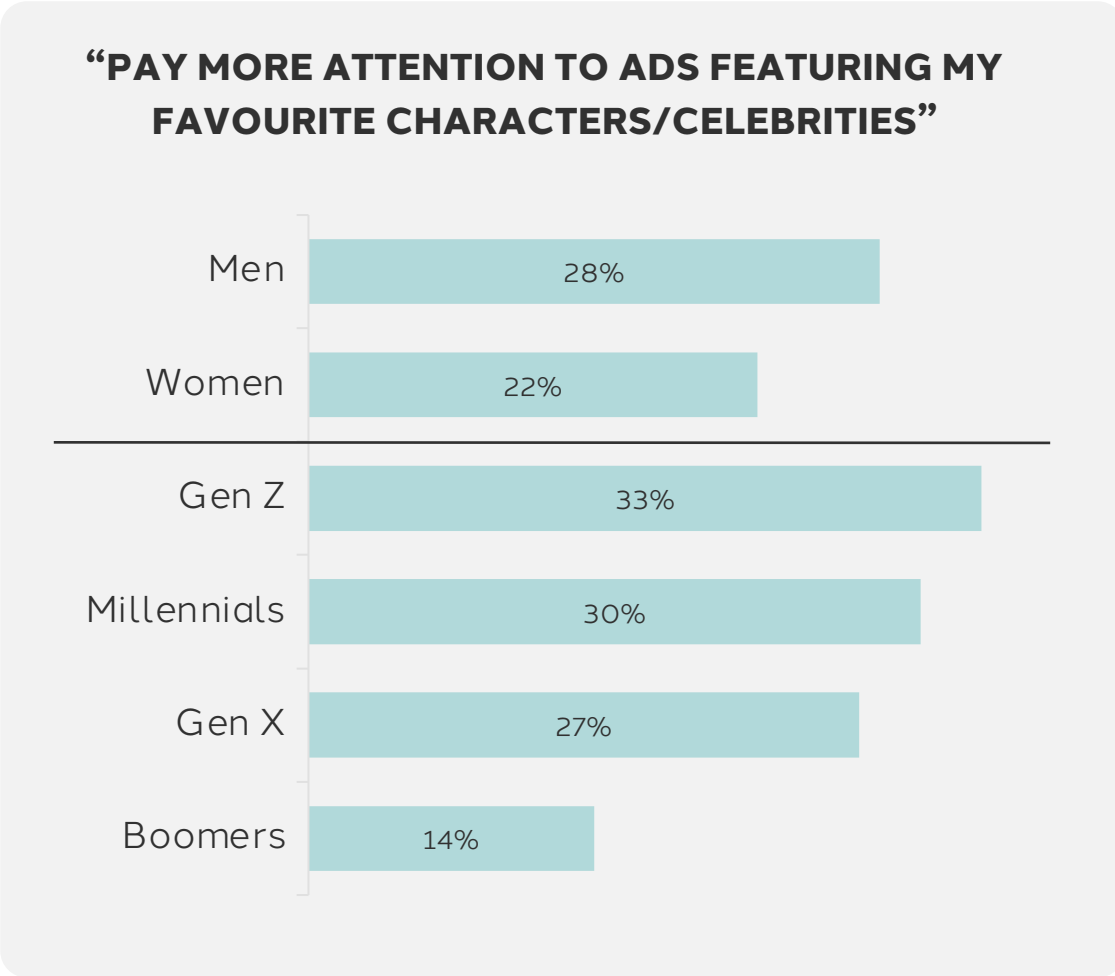
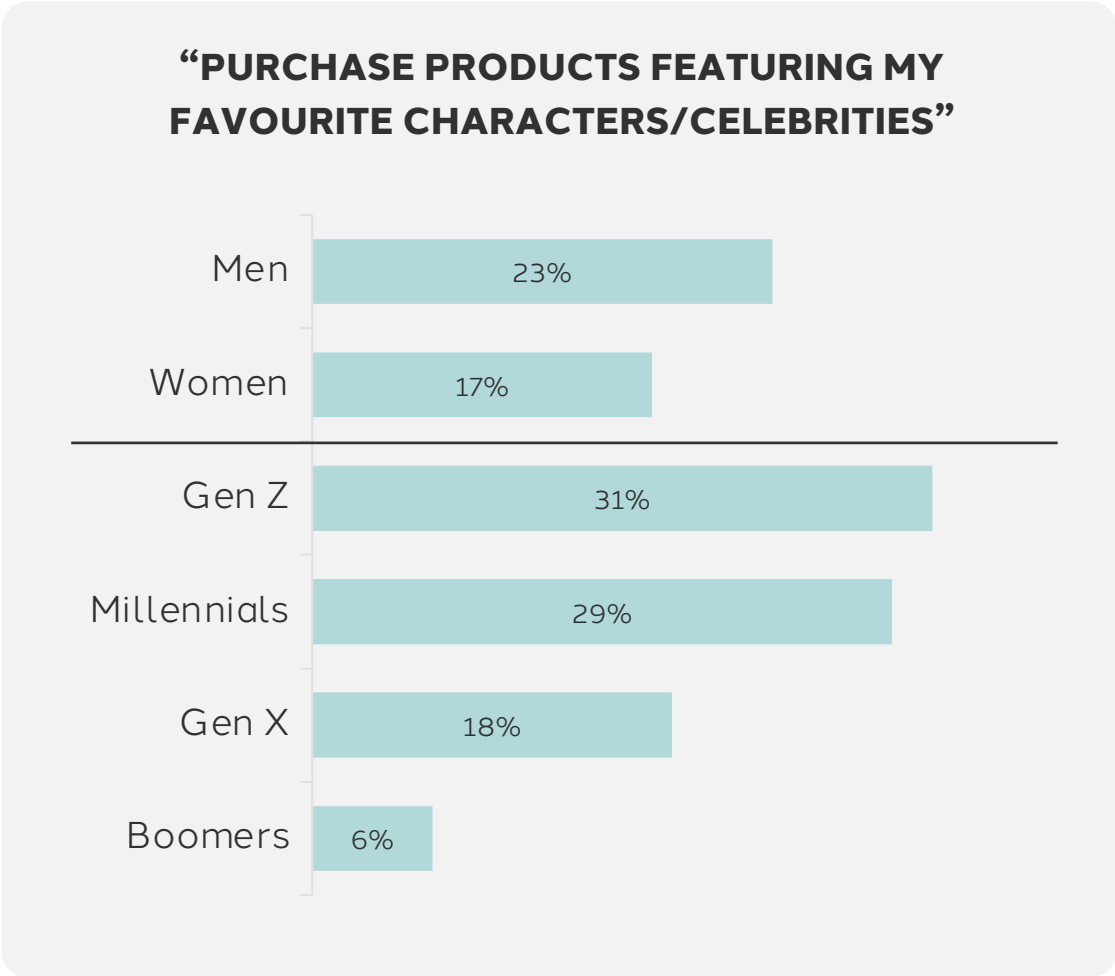
1 in 4 would take part in focus groups, pay more attention to ads, and purchase apparel that features the IP.

WHICH OF THE FOLLOWING BRAND INTEGRATIONS INTO ENTERTAINMENT WOULD YOU ENGAGE IN THE MOST IF THEY INVOLVED IP YOU LIKE?



IP PARTNERSHIPS HAVE AN EVEN BIGGER IMPACT ON ENGAGEMENT WITH BRANDS WHEN IT COMES TO YOUNGER COHORTS

Gen Zers and Millennials are more likely to purchase products featuring the IP and pay attention to ads.



IMPLICATIONS FOR MARKETERS

REFRAME INTEGRATIONS INTO MOVIE IP THROUGH AN ECOSYSTEM APPROACH

The inflection point for brand-integrations into movie IP is now extending far beyond the theatrical release. And some of the most anticipated theatrical releases are ‘born’ out of serialized anime or TV series. Build integrations through a dual lens: in-the-moment hype and prolonged exposure. Design campaigns that deliver benefits to viewers (and return results to your brand) across both horizons.

POSITION YOURSELF AS AN EARLY ADOPTER IN THE MICRO-DRAMA SPACE

Micro-dramas are getting more popular in North America and given the extent to which they are being embraced by younger cohorts, they are likely to grow even further in popularity in years to come. Consumers report brand-integrations within this genre have significant brand lift effects, so experimenting early can prove to be a powerful differentiator. Single episodes might be short, but exposure is prolonged.

SEGMENTING AUDIENCES BY FANDOM CAN HELP BRANDS MAXIMIZE REACH

IP partnerships into entertainment have a positive impact for brands, with 3 in 10 consumers more likely to follow and purchase when they are favorite IPs and celebrities are involved. Seek the advice of experts who have a strong understanding of audience behavior across the entire media ecosystem and proven expertise with both mainstream and niche entertainment IP to maximize the return on your investments in this space.



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THANK YOU

INNOVATING TO IMPACT

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