Breaking down the attention economy

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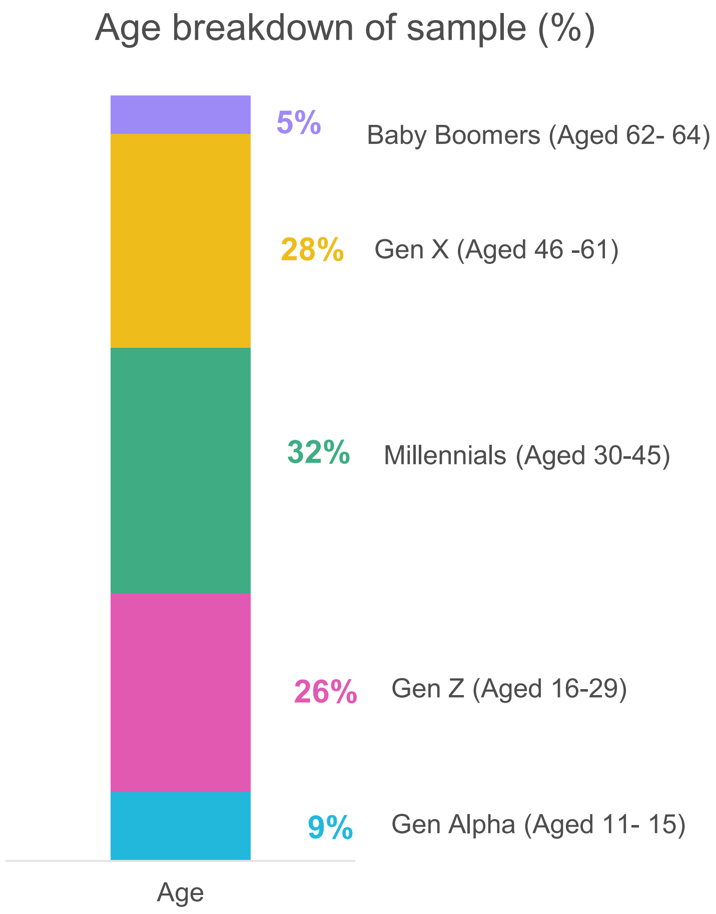
Ampere sought to understand how consumers divide their attention

- Consumer attention is increasingly fragmented, with a growing number of platforms, formats and media types competing for time in already crowded daily routines. As choice expands, attention is no longer evenly distributed, nor equally valuable, creating new challenges for media companies, advertisers and platforms looking to stand out, retain audiences and drive value

- To better understand how attention is divided, Ampere conducted a nationally representative online survey of 2,000 consumers aged 11–64 across the USA and UK. Fieldwork was conducted in April 2026. The study explores how people engage with different media types, how these behaviours are changing over time, and the varying roles media plays across daily routines and need states

- The research examines attention through multiple lenses including reach, time spent, perceived value and monetisation relevance. It considers how attention varies by age, market and context, and what this means for strategy, advertising effectiveness and long-term audience relationships

- Analysis results are frequently segmented by generation, defined as: Gen Alpha (ages 11–15), Gen Z (16–29), Millennials (30–45), Gen X (46–61) and Baby Boomers (62–64). Where analysis refers to users of specific media or platform types, this is based on respondents who report using that service in a typical week, unless otherwise stated. This approach allows comparison across both broad population trends and more engaged user groups, reflecting how attention is distributed and experienced in practice

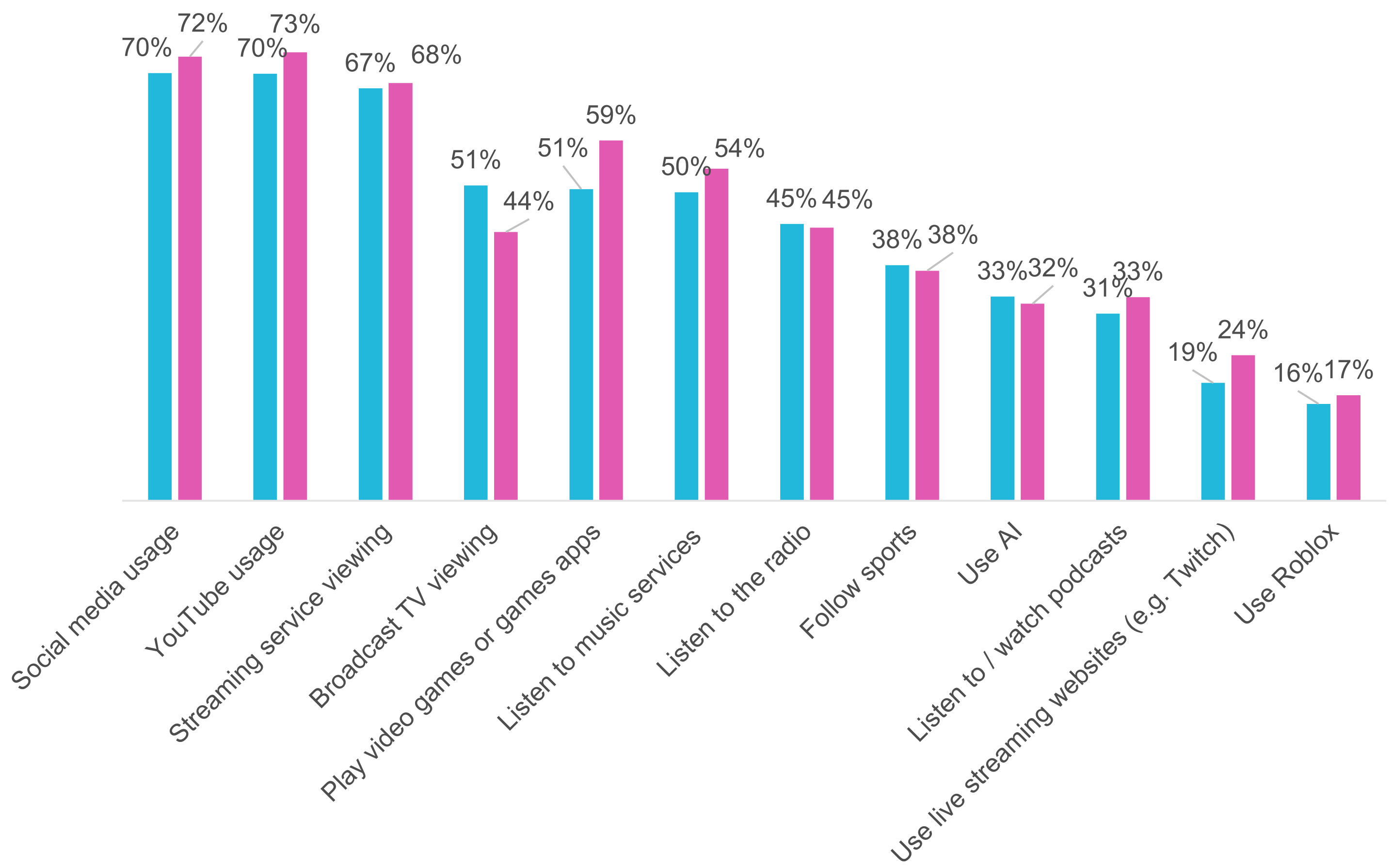


Weekly media and attention budget

YouTube, social media, and streaming services yield the widest reach in media

- In both the USA and UK, social media and YouTube currently reach the widest audiences, with about seven in ten internet users reporting having regularly used each media type
- Streaming services rank just below social media and YouTube for share of weekly usage, though above the reach of broadcast TV channels. Notably, there is a higher proclivity towards linear TV in the UK than in the USA
- The USA also scores relatively higher on share of weekly engagement with video games and music service usage than the UK

Consumers' (%) that engage with media activity type, weekly, USA & UK



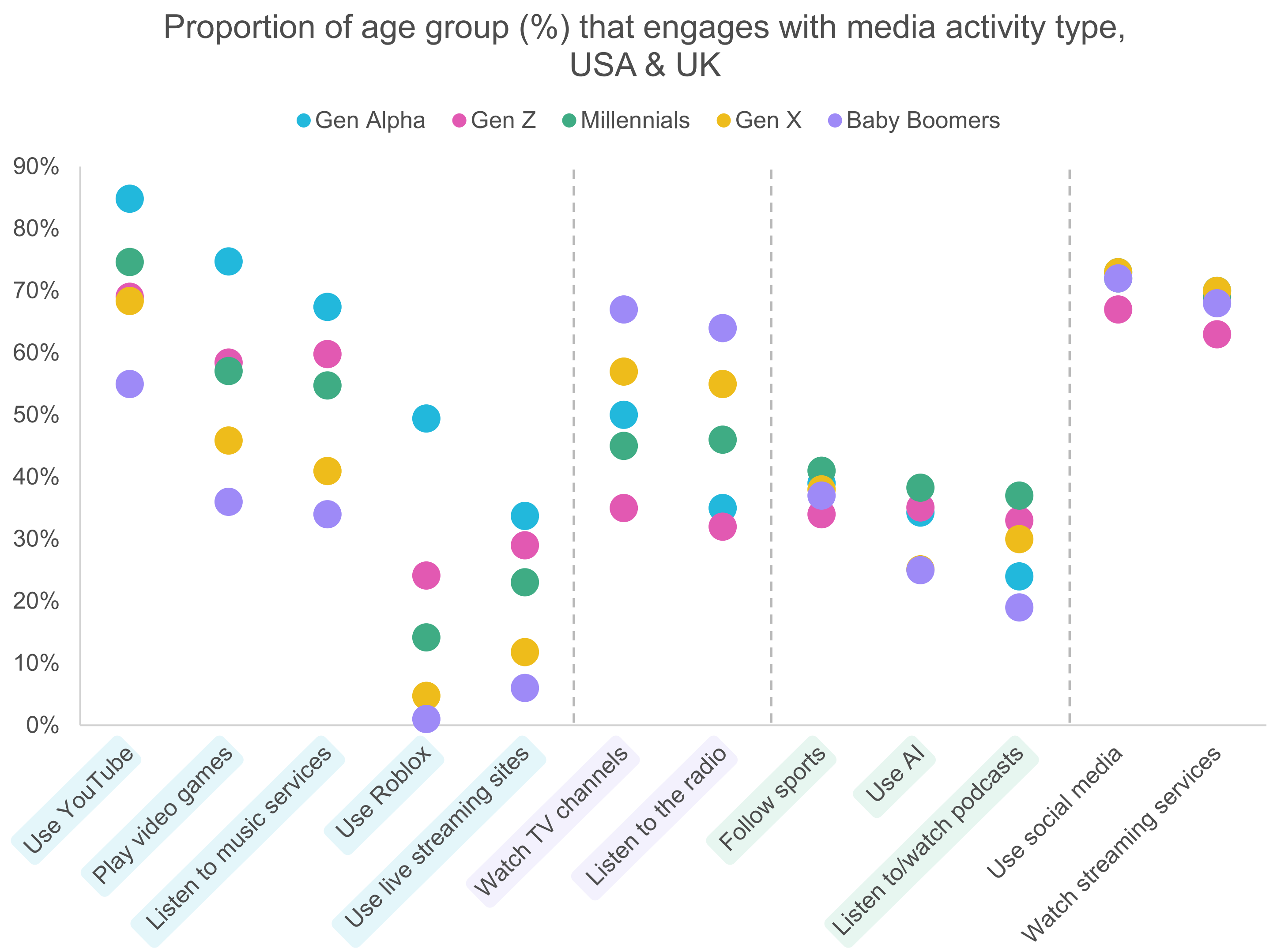
Source: Ampere Attention Economy Survey

Younger age groups over-index for video games and YouTube usage, while older groups skew towards television and radio

- Younger consumers are more engaged with YouTube, video games, music services, and Roblox, while older cohorts maintain usage of TV channels and radio programming. Social media and streaming are flat across age groups

- Sports, AI, and podcasts skew slightly towards Millennials. Podcasts particularly have a bell curve when it comes to age, being least popular with Gen Alpha and Baby Boomers

- Gen Alpha tends to gravitate more towards social online activity, whereas podcasts are more of a solo activity. Separately, older cohorts are drawn more towards radio when it comes to talk audio. They are also less likely to reside on platforms that feature podcasts like Spotify, YouTube, and even TikTok and Instagram Reels



*** Gen Alpha 11-16 years old, Gen Z 16-29 years old, Millennials 30-45 years old, Gen X 46-61 years old, Baby Boomers 62-64 years old*

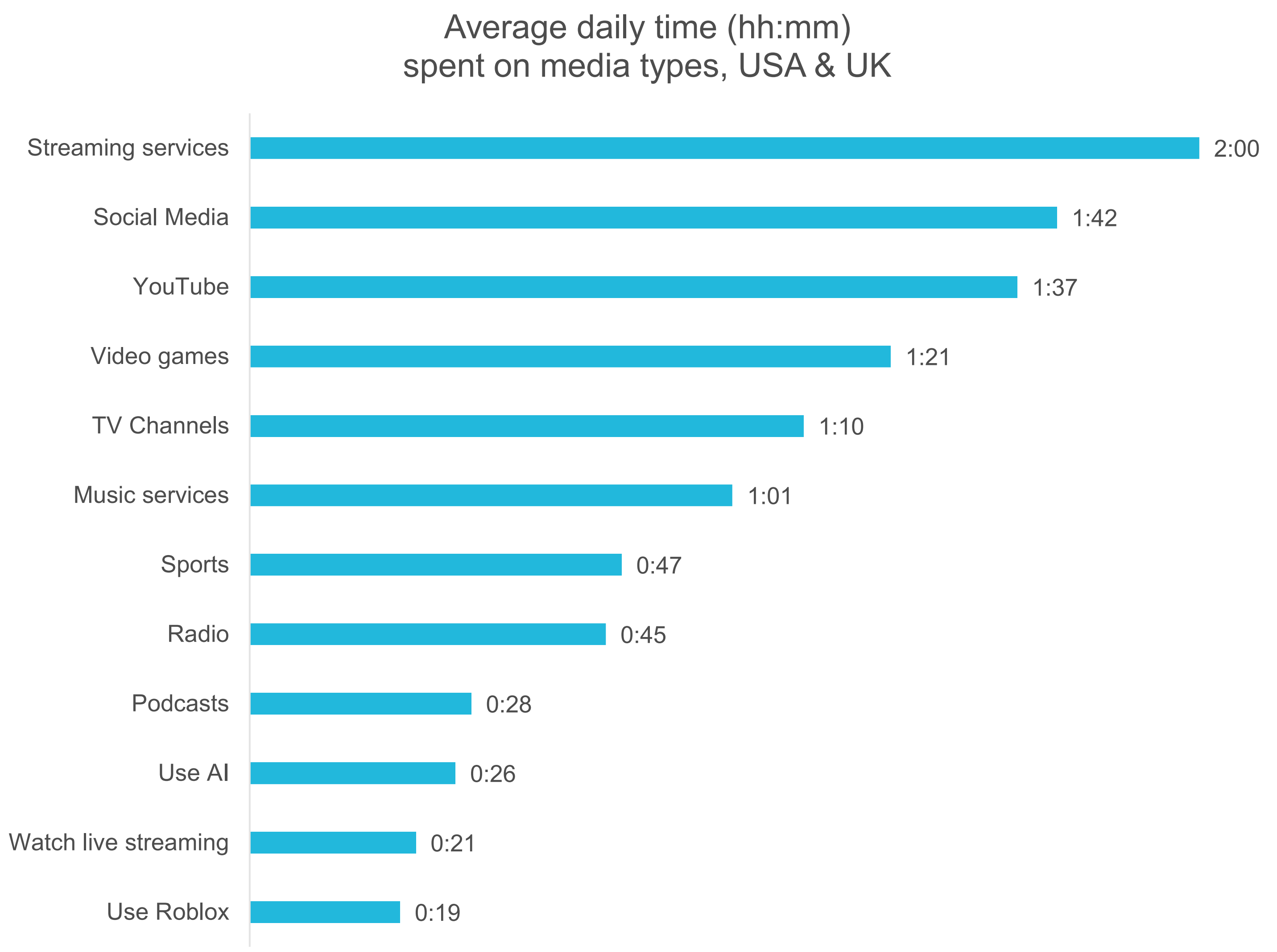
Source: Ampere Attention Economy Survey

Conversely, streaming services garner more total viewing time than social media and YouTube

- In the USA and UK, TV & film-focused streaming services still attract the highest average daily viewing time - above social media and YouTube, although a higher proportion use social media and YouTube at least once weekly

- Although streaming services have taken share of viewing time from pay TV, TV channels remain the fifth most popular media type by time viewed. Considering the overlap between TV channels and streaming (i.e. Disney+ and ABC) the role of the legacy studios and broadcasters in the average daily media diet remains high

- Podcasts, AI, and live streaming sites remain nascent mediums, scoring near bottom of the media types in terms of average daily use time



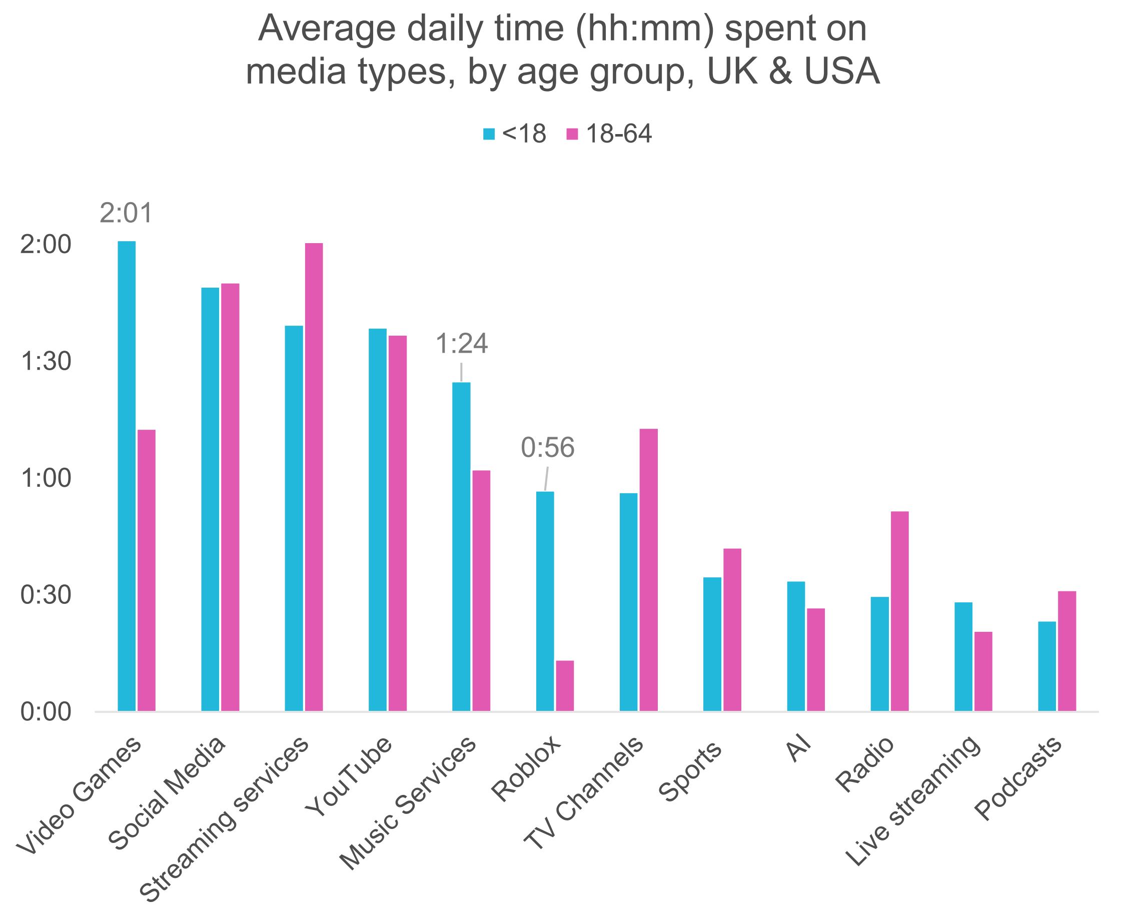
Source: Ampere Attention Economy Survey

Teenagers spend the most time playing video games and scrolling social media

- Gen Alpha teenagers spend the most time playing video games compared to other media types, followed by social media, streaming services and YouTube. They significantly over-index on time spent on video games, music services, and Roblox, while under-indexing on streaming services, TV channels, and radio

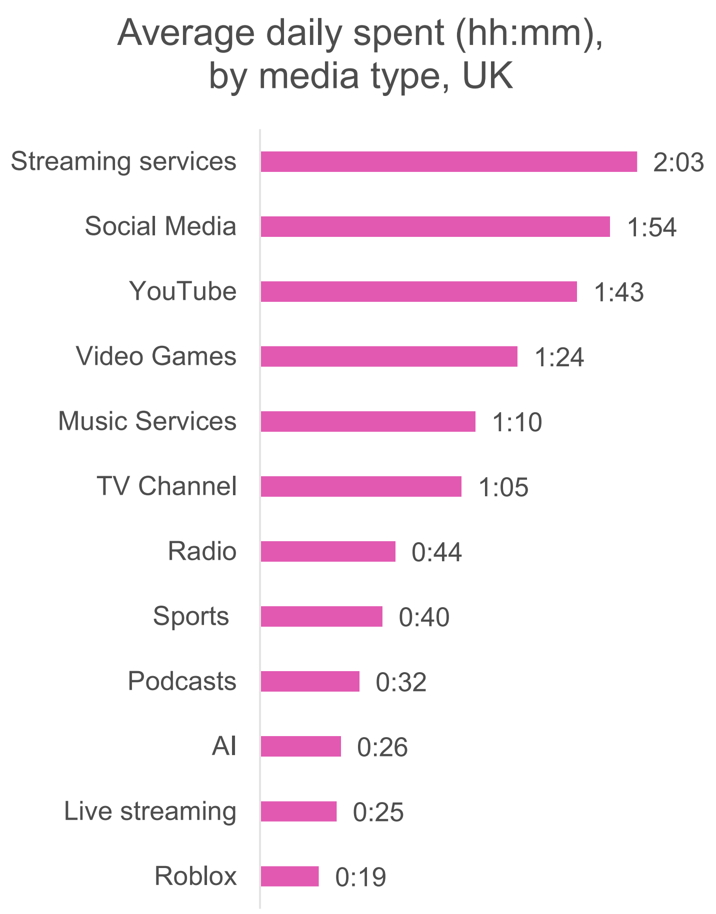
- These viewing time figures paint a picture of the online ecosystem of Gen Alpha. Their two top mediums by time spent are social in nature: video games and social media. A defining characteristic of Gen Alpha is that many formative years were spent within pandemic lockdowns. As such, this is a generation comparatively more accustomed to socialising online

- This group also under-indexes on platforms that primarily feature long-form content. This is not to suggest that they do not watch TV & film; streaming services scores as third among teenagers via viewing time. However, that they score lower on time spent with these ‘long-form’ services indicates a relative aversion to focusing on television and movies for longer periods of time

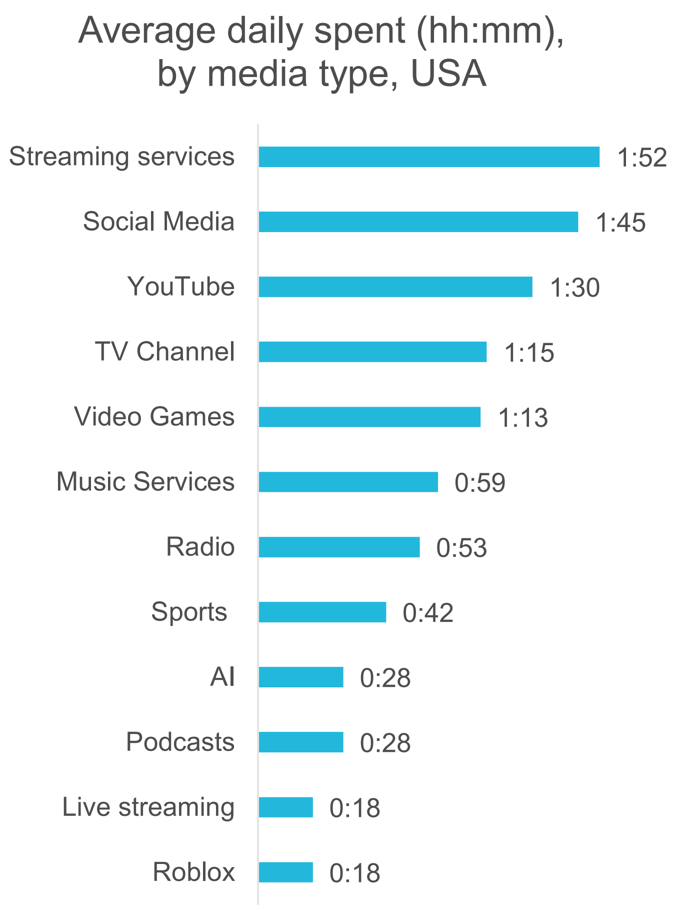


Source: Ampere Attention Economy Survey

Streaming, social media, and YouTube hold the most daily viewing time in both the USA and UK



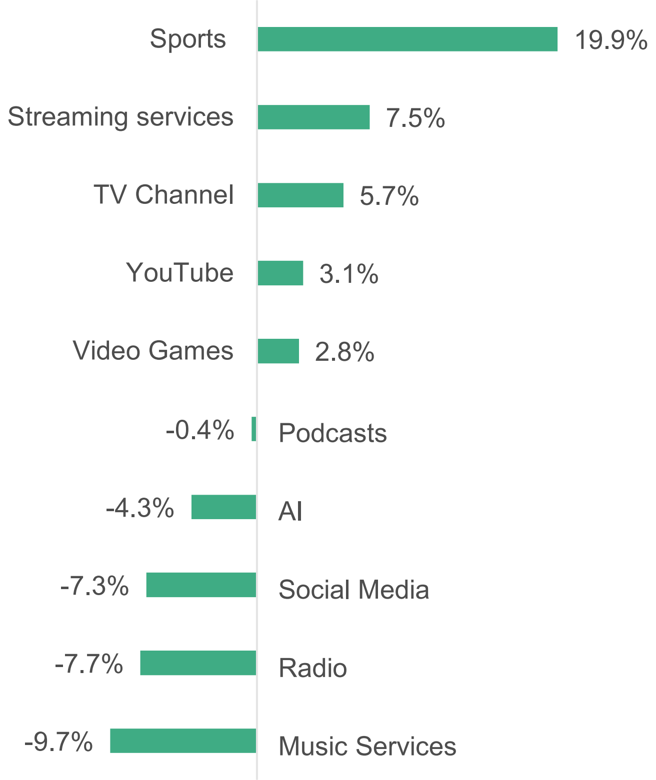
- Both the USA and UK spend the most overall time on streaming services, despite social media and YouTube being the top mediums for general reach (by proportion who use weekly)
- The UK still spends more time on the radio, with more comprehensive national programming available than the USA. Conversely the USA spends more time on music services like Spotify, and slightly more time listening to podcasts in general
- Daily average time spent using AI services in both markets scores at around 1 hour 20 minutes. As for attitudes around AI's increasing prevalence, 45% of those surveyed in both the US and UK believe that the positives of AI outweigh the negative



Source: Ampere Attention Economy Survey

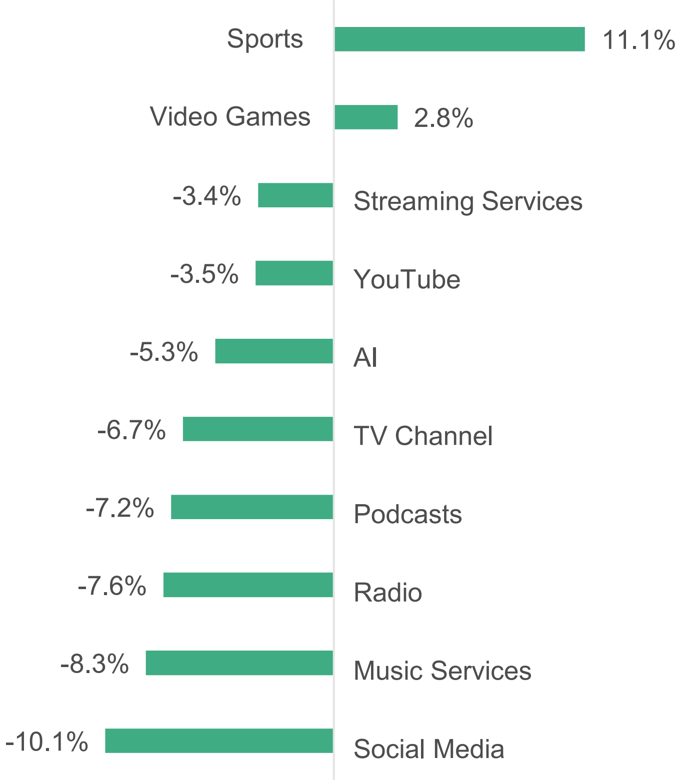
Commuter-friendly media is used more during the week, whereas sports takes weekend time

Change in share of time (%) on weekends, by activity, UK



- Sports takes up a comparably larger amount of weekend time compared to weekday time in both the USA and UK, aligning with the schedule of the most popular sports leagues in both markets
- Conversely, more audio-friendly formats suitable for commuting skew viewing time towards the weekday, like podcasts, radio, and music services. The USA particularly spends more time listening to podcasts during the week compared to the weekend
- AI use skews towards the working week, aligning with its increasingly application towards white collar work
- Long-form content (streaming and TV) skews towards the weekend for the USA, but towards the weekday for the UK

Change in share of time (%) on weekends, by activity, USA



Average time spent on activity on weekend day divided by time spent on activity on weekday day (hh:mm)

Source: Ampere Attention Economy Survey

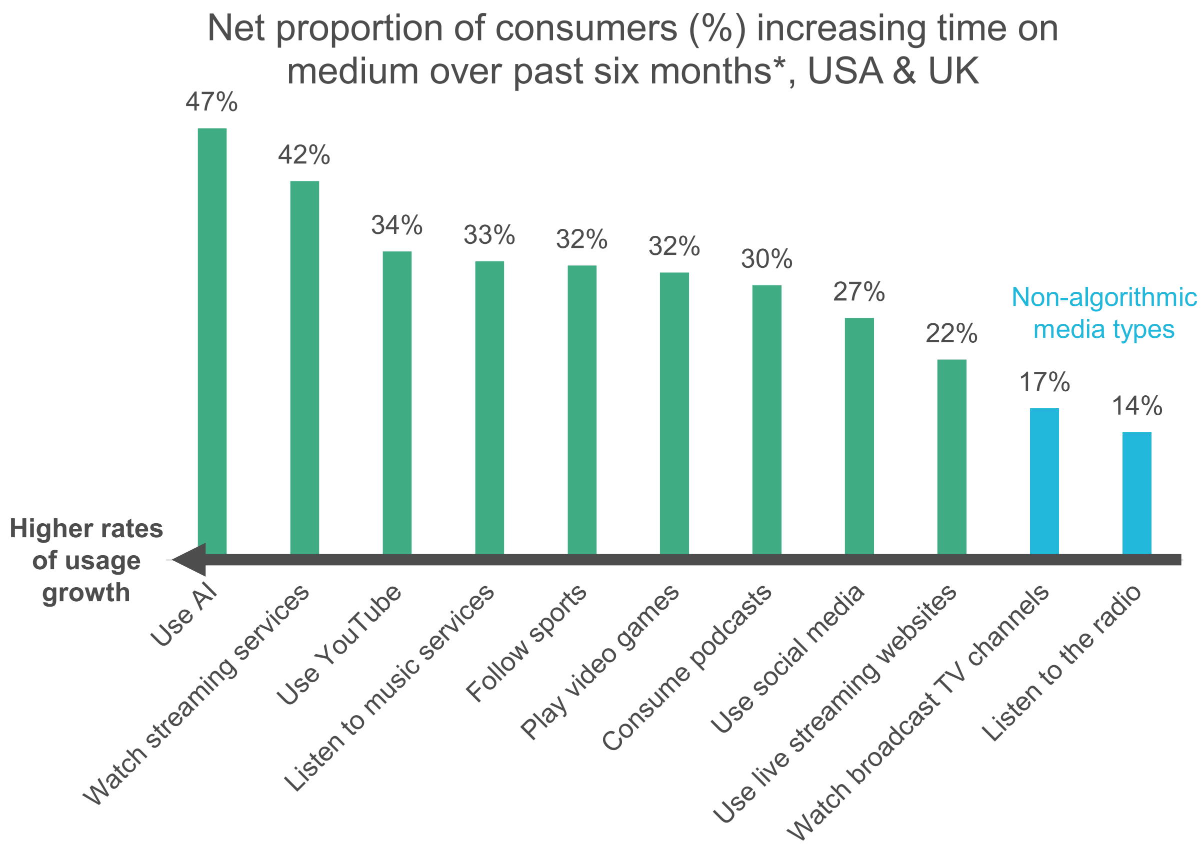
AI and streaming services show highest gains in time spent across USA and UK populations

- Ampere asked respondents if they have increased or decreased their use of the following media types over the past six months. The chart's figures (right) are the result of subtracting the proportion who claim a decrease from the proportion who claim increase, hence net increase

- Such figures inform on the direction of media in general: AI, streaming services, and YouTube see the highest rates of reported increased use, whereas live streaming, broadcast TV, and radio have the lowest rates of growth

- The rate of growth of a media type can prove a particularly valuable metric to advertisers. While the structures of ad deals vary, advertisers can benefit from locking them in before periods of growth for the platform. AI platforms, the medium growing the fastest, could fit such a mold. OpenAI's ChatGPT started showing sponsored results earlier this year, not to mention the plethora of smaller AI tools that have growth potential. Advertisers would be well advised to fully explore AI advertising opportunities as the medium continues to grow

- Worth noting is a key differentiator of radio and broadcast television from most of the rest of the media types featured here: algorithmic content. Consumers are gravitating towards media that hand-select relevant content using data. By the same token, advertisers can use the algorithmic capabilities of the ad systems of these platforms



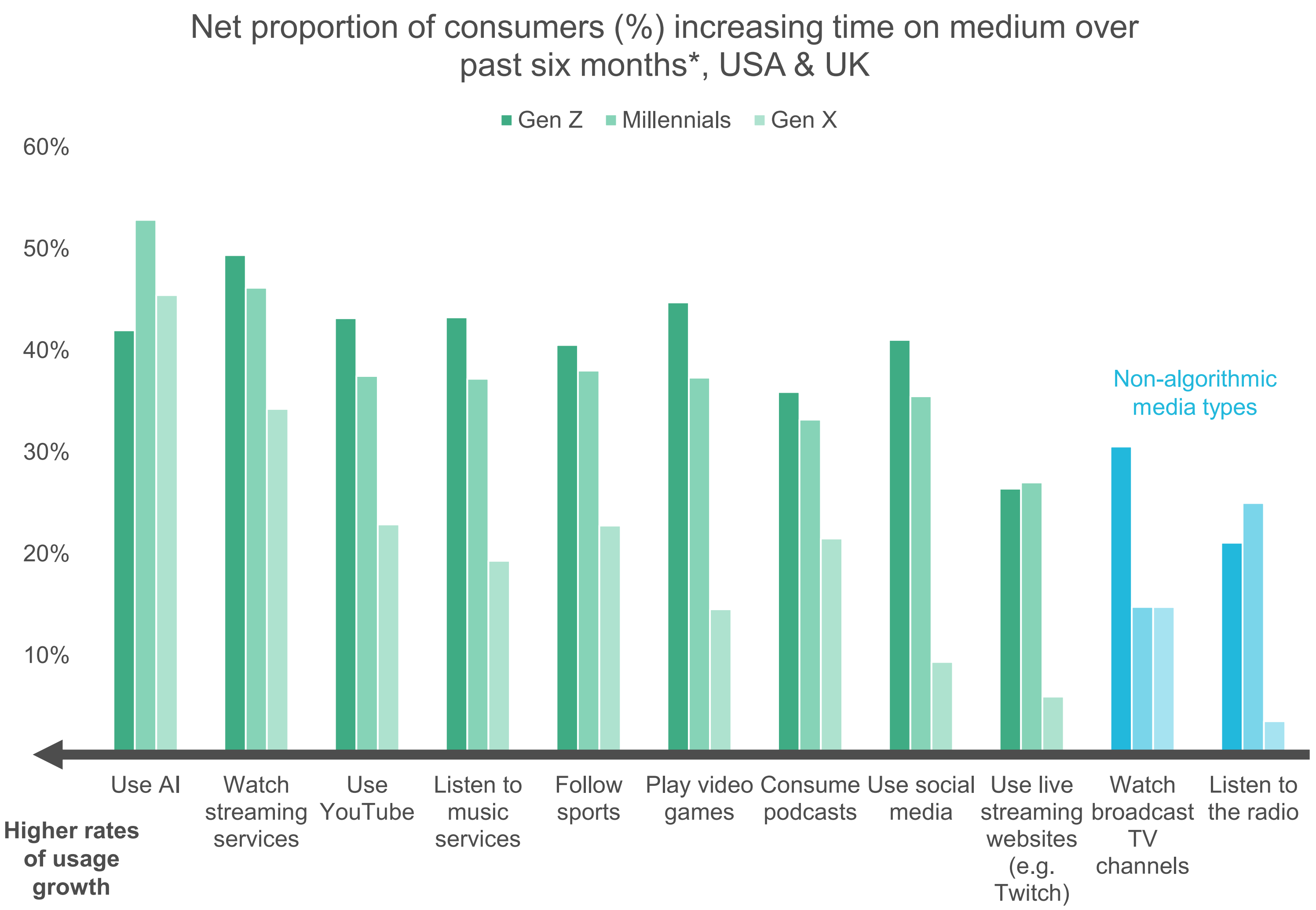
**Proportion of people who claim they have increased time spent on platform past 6 months – proportion who have claimed they have decreased time spent on medium*

Source: Ampere Attention Economy Survey

AI has grown in use most among Millennials; younger people are increasingly watching sports

- Older generations are also increasingly engaging with algorithmic media platforms. Streaming services, YouTube and other algorithmic platforms have become ubiquitous across age groups. While the growth rate of social media use for Gen X is more muted, it is nevertheless increasing

- Gen Z's consumption of sports content is growing at a higher rate than podcasts and live stream sites for this age group. Furthermore, general sports consumption is growing at a higher rate than broadcast television channels, meaning Gen Z and older generations are increasingly engaging with sports outside of the live event, such as via streaming, social media, and YouTube



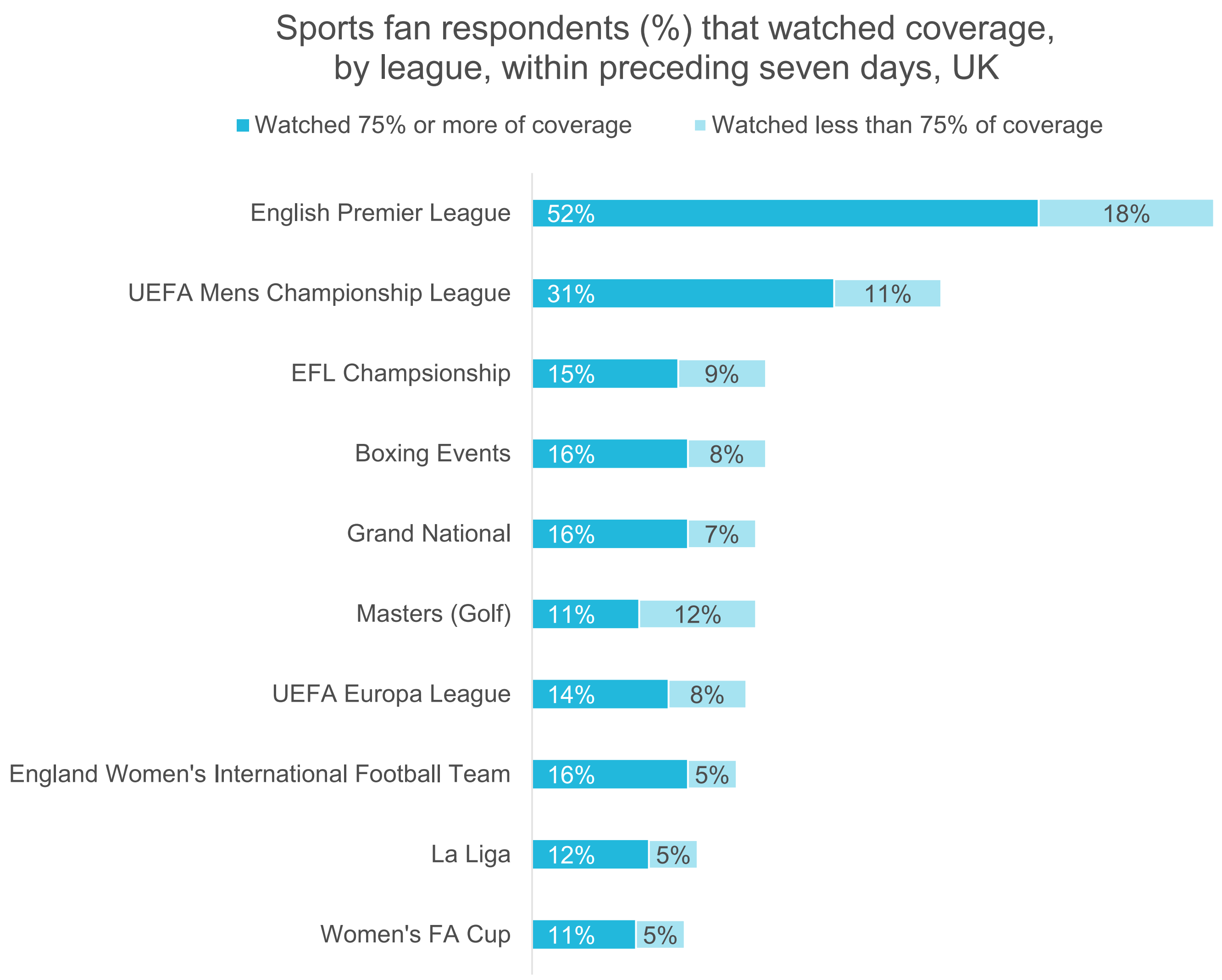
*Proportion of people who claim they have increased time spent on platform past 6 months – proportion who have claimed they have decreased time spent on medium

** Gen Z 16-29 years old, Millennials 30-45 years old, Gen X 46-61 years old

Source: Ampere Attention Economy Survey

Sport engagement is concentrated around the English Premier League in the UK

- In the UK, sports interest is concentrated around a small number of key leagues and competitions, creating highly predictable and repeat viewing behaviour
- Football leagues see the highest level of interest in the UK, with the Premier League holding by far the highest levels of weekly viewing - almost three quarters of sports fan having watched. Most sports fans also watched 75% or more of the Premier League coverage that week, demonstrating that it allows for repeat engagements
- This consistency means sport is uniquely valuable within the attention economy: it delivers reliable, habitual engagement



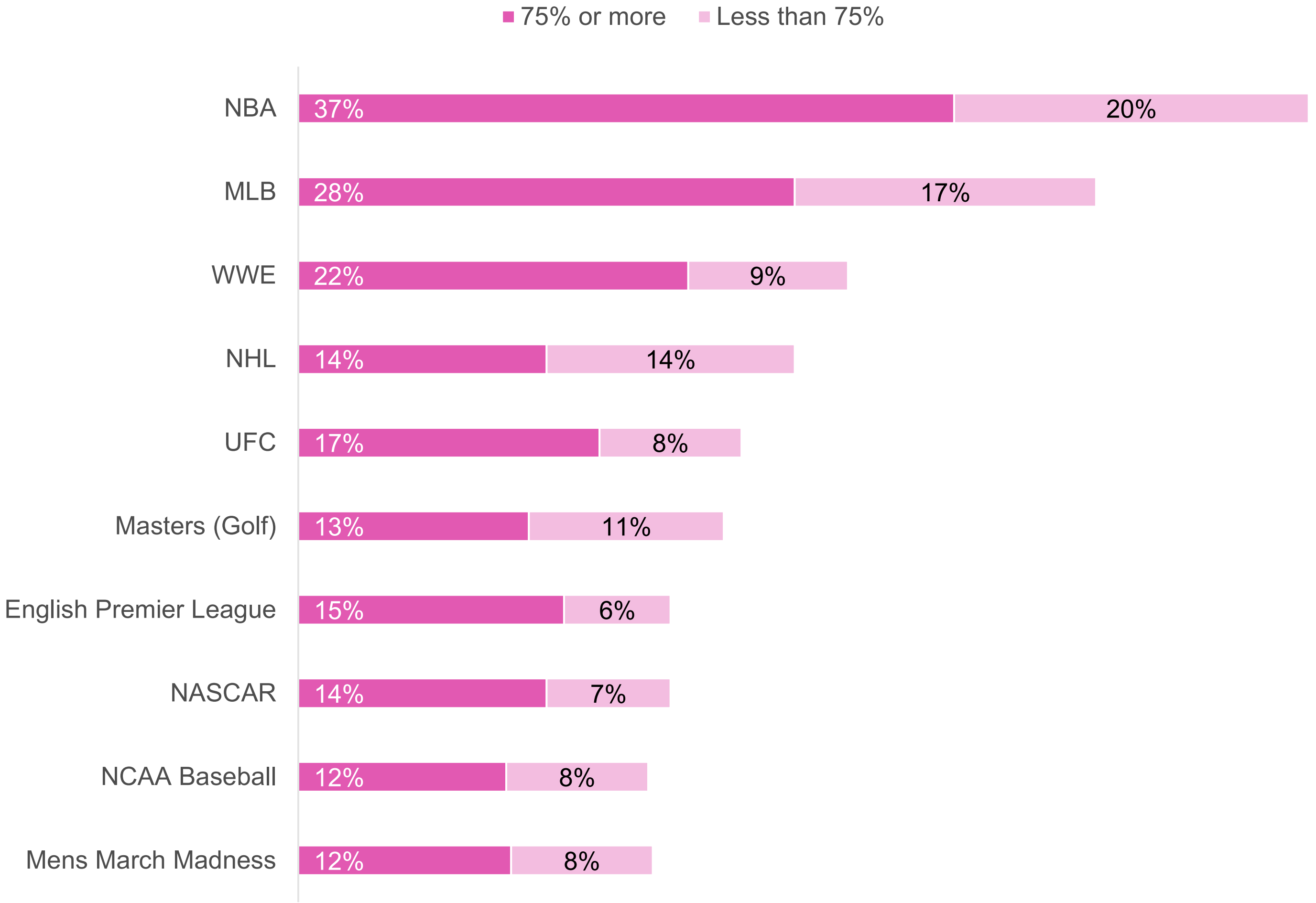
Source: Ampere Attention Economy Survey; respondents ages 18-64

Fragmented sports fandom in the US makes sustained attention harder to monetise

- The top three leagues in season in the USA sit across three different sport types, suggesting that fandom is more diverse. This means that unlike the UK, where football is generally a safe bet, in the USA rights holders need to split their rights between leagues and events to achieve mass appeal

- This fragmentation of sports attention in the USA has important implications for how value is created in the attention economy. When fandom is spread across many leagues, sustained and predictable attention becomes harder to secure, pushing rights holders and platforms to compete not just on reach, but on the quality and intensity of engagement

Sports fan respondents (%) that watched coverage, by league, within preceding seven days, USA



NB: Ampere included leagues with an active season in this survey, with the NFL finishing earlier in the year.

Source: Ampere Attention Economy Survey; respondents ages 18-64

Different media types offer varied avenues for advertisers to reach wider consumer segments

Social media, streaming services, and YouTube are the most used media platform types in the USA and UK, weekly. Broadcast television channels maintain a higher weekly usage rate in the UK than the USA, relative to other media types

Gen Alpha is the next generation of media consumers. Their media habits are reflective of that many of their formative years were during the Covid-19 pandemic and its lockdowns; they gravitate more towards online media that is social in nature: YouTube, social media, Roblox, and video games

Streaming services accumulate more daily viewing time than any other media type. Podcasts, music services, and AI time spent skew more towards the weekday, and as such players in these spaces should recognise their value as 'commuter media'

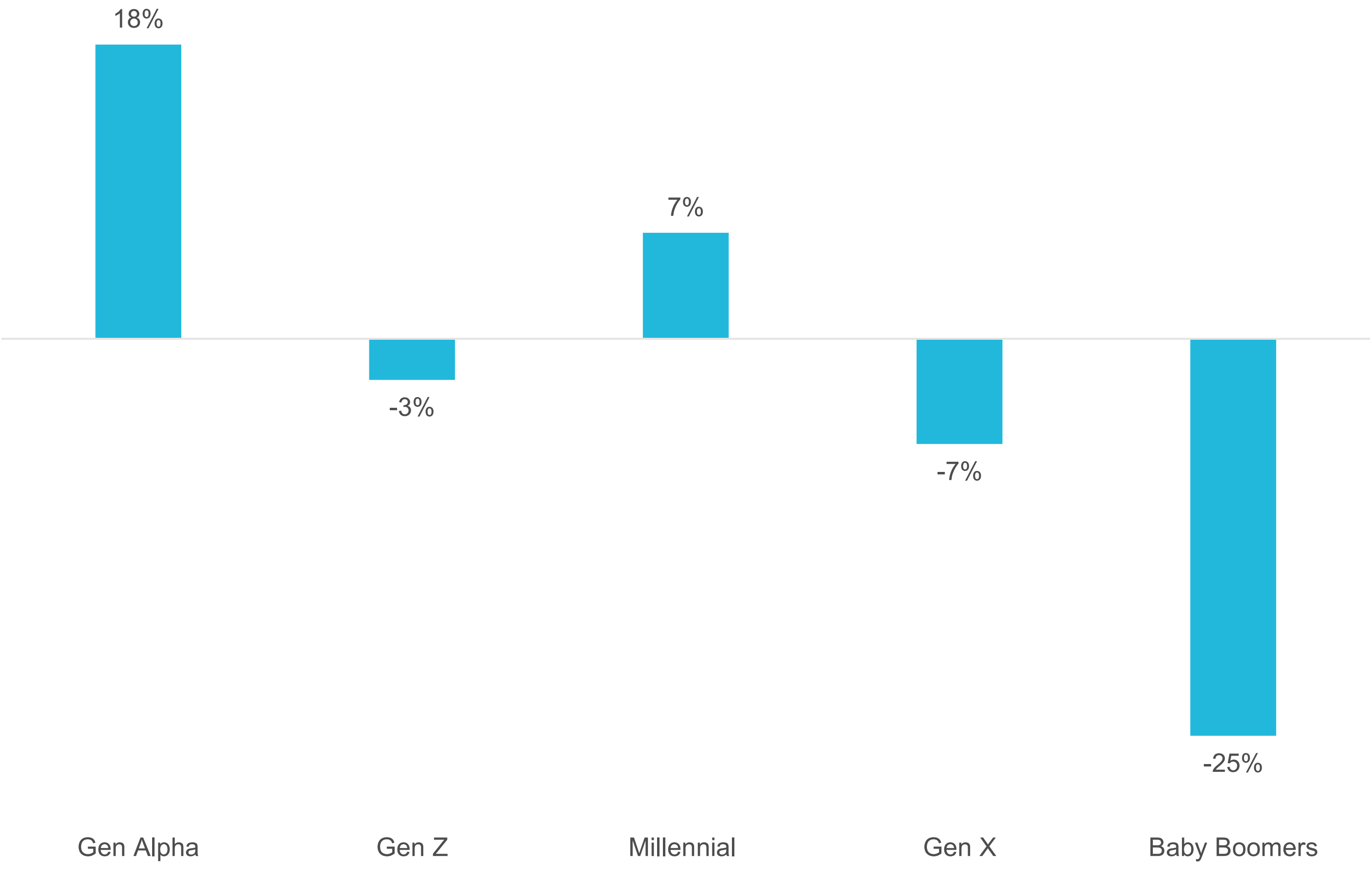
AI tools are the fastest-growing media type in the USA and UK by net increase. Algorithm-driven media are the fastest growing mediums. As such, algorithms are now ubiquitous, and any platform not using algorithmic content feeds will continue to lose engagement relative to those that can successfully use them

Which platforms take attention?

Consumers don't commit to a single platform; they engage with multiple services

- Consumer attention is not only divided between different media, but also between different platforms. The average consumer uses 11.5 different platforms in a week across video, social media, audio and games subscriptions
- Baby Boomers use fewer services, suggesting that they are less diverse in their platform usage. However, they are the least likely of all age groups to say they struggle to find time to do the things they enjoy, so could be low-hanging fruit, if services can entice them
- With consumers spreading time across many services, platforms must earn a defined place in weekly routines. Services without a clear role are more likely to be deprioritised or dropped as attention and time become constrained

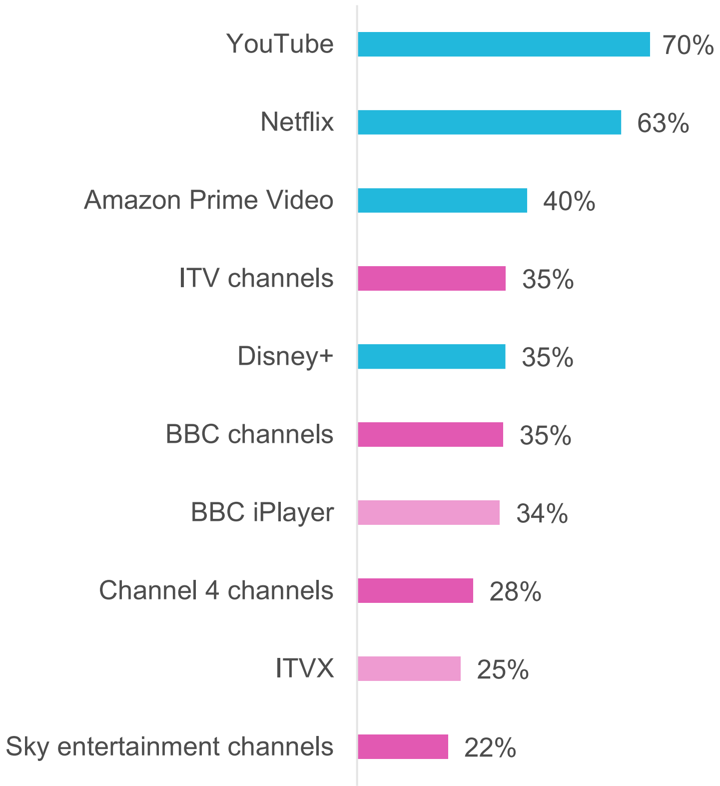
Difference (%) in number of media services accessed from base average, by age group, USA and UK



Source: Ampere Attention Economy Survey, n=2,000

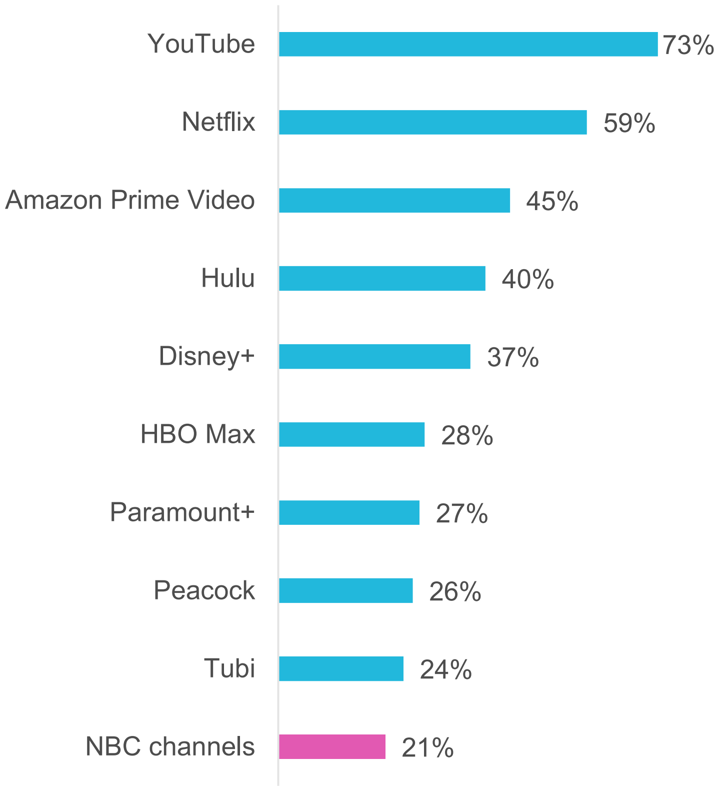
In video, streaming dominates the USA market; broadcasters are important in the UK

Top 10 video services among UK consumers (%) for weekly usage



- In the UK, the majority of the top 10 most-used video services are represented by **broadcaster** content, from both linear channels and BVoD platforms, with both formats from the BBC and ITV popular
- In the USA, **online viewing** dominates the most-used services. The majority of these are paid subscriptions, but free, ad-supported platform Tubi also features. The platform offers both video-on-demand and FAST, suggesting that demand for free, linear-style viewing remains
- The data shows that video viewing isn't one-size-fits-all, different styles of viewing appeal. Both on-demand, choice-driven viewing and scheduled content have a place in the attention mix

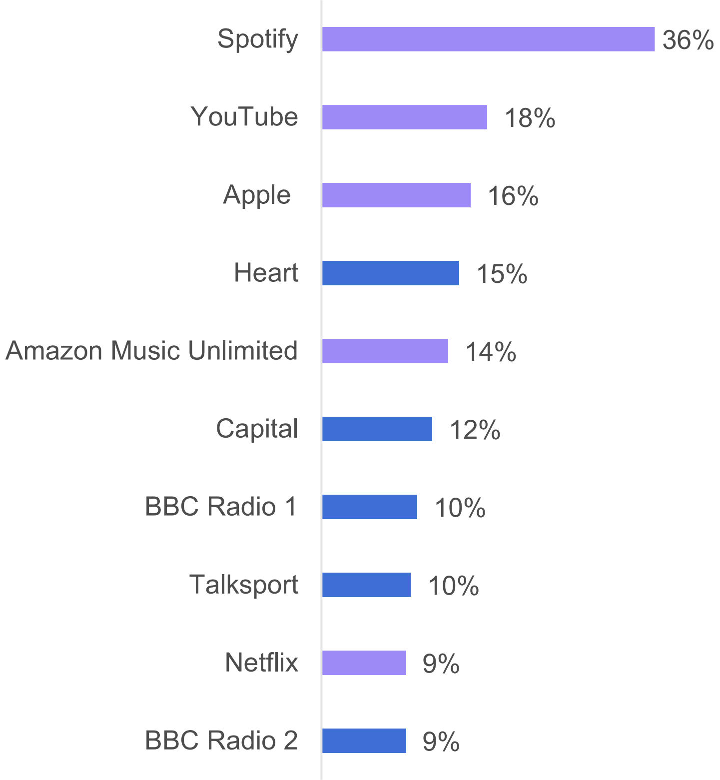
Top 10 video services among US consumers (%) for weekly usage



Source: Ampere Attention Economy Survey, n=2,000

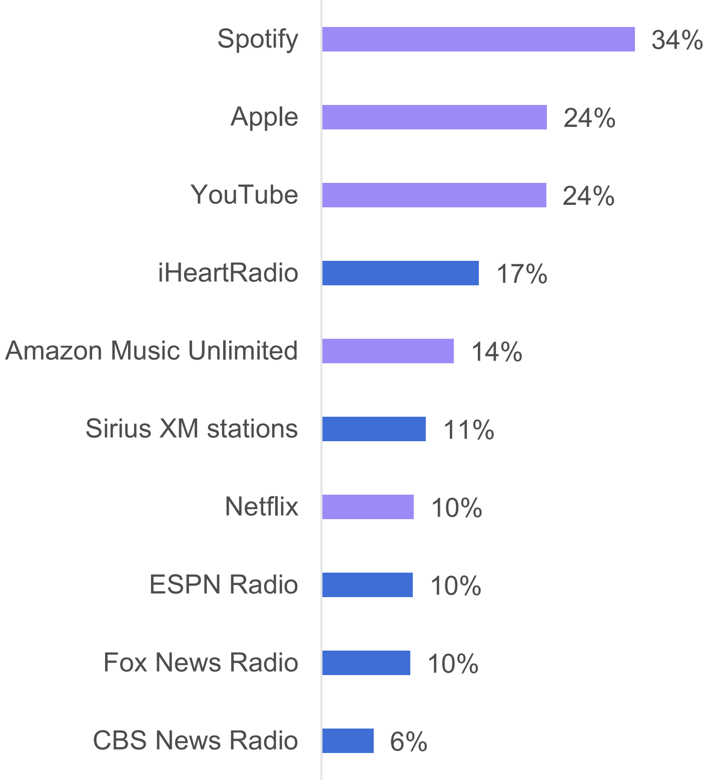
Audio follows a similar pattern; streaming services lead while radio also commands reach

Top 10 audio services among UK consumers (%) for weekly usage



- The audio market has a similar split between **on-demand subscriptions** and **radio** – a format akin to scheduled TV
- There is also a divide when it comes to exposure to advertising. Both Spotify and YouTube offer a free, ad-supported tier. Commercial radio is also popular in both the UK and the USA - Sirius XM stations are popular in the latter, operating on a paid subscription basis. It offers free ad-supported tiers in selected cars and some free content
- Netflix, which has recently added video podcasts to its platform, featured in the top 10 in both markets, suggesting that there is potential for growth in new medias. For platforms like Netflix, which are shifting their focus towards subscriber retention, catering to as much of the attention economy as possible will boost engagement

Top 10 audio services among US consumers (%) for weekly usage

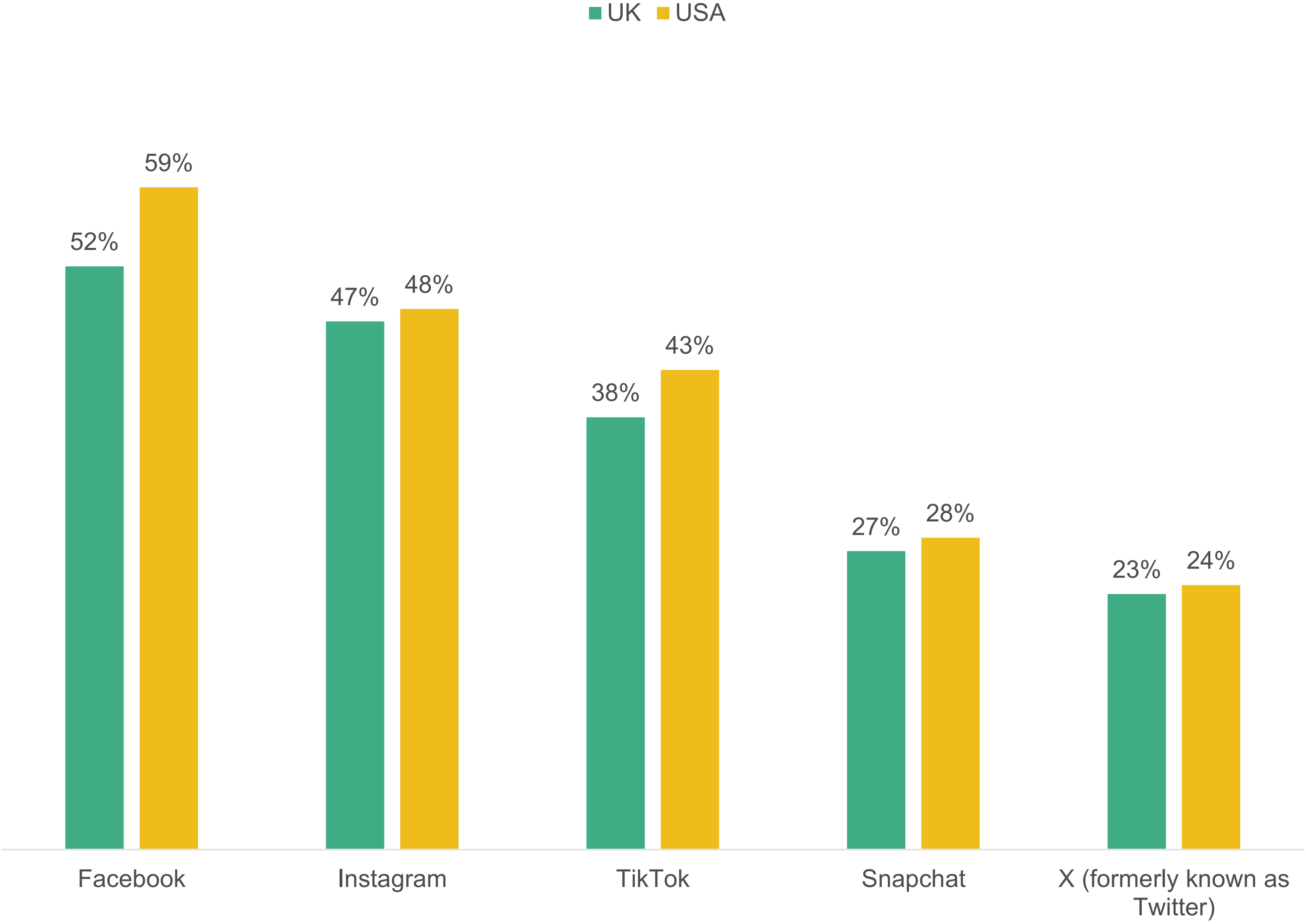


Source: Ampere Attention Economy Survey, n=2,000

Facebook is the most widely used social media platform

- Facebook is the most popular social media platform across both markets, reaching more than half of consumers
- It primarily operates as a long-form service, with longer posts and community groups heavily featured. Conversely, other social video services are more reliant on short posts and short-form videos. This suggests that demand for long-form, community-based social media remains
- The popularity of Facebook is driven by older consumers, suggesting that they are leading the demand, where as Gen Alpha and Gen Z are heavier users of short-form platforms, such as Instagram and TikTok

Top social media services among consumers (%) for weekly usage



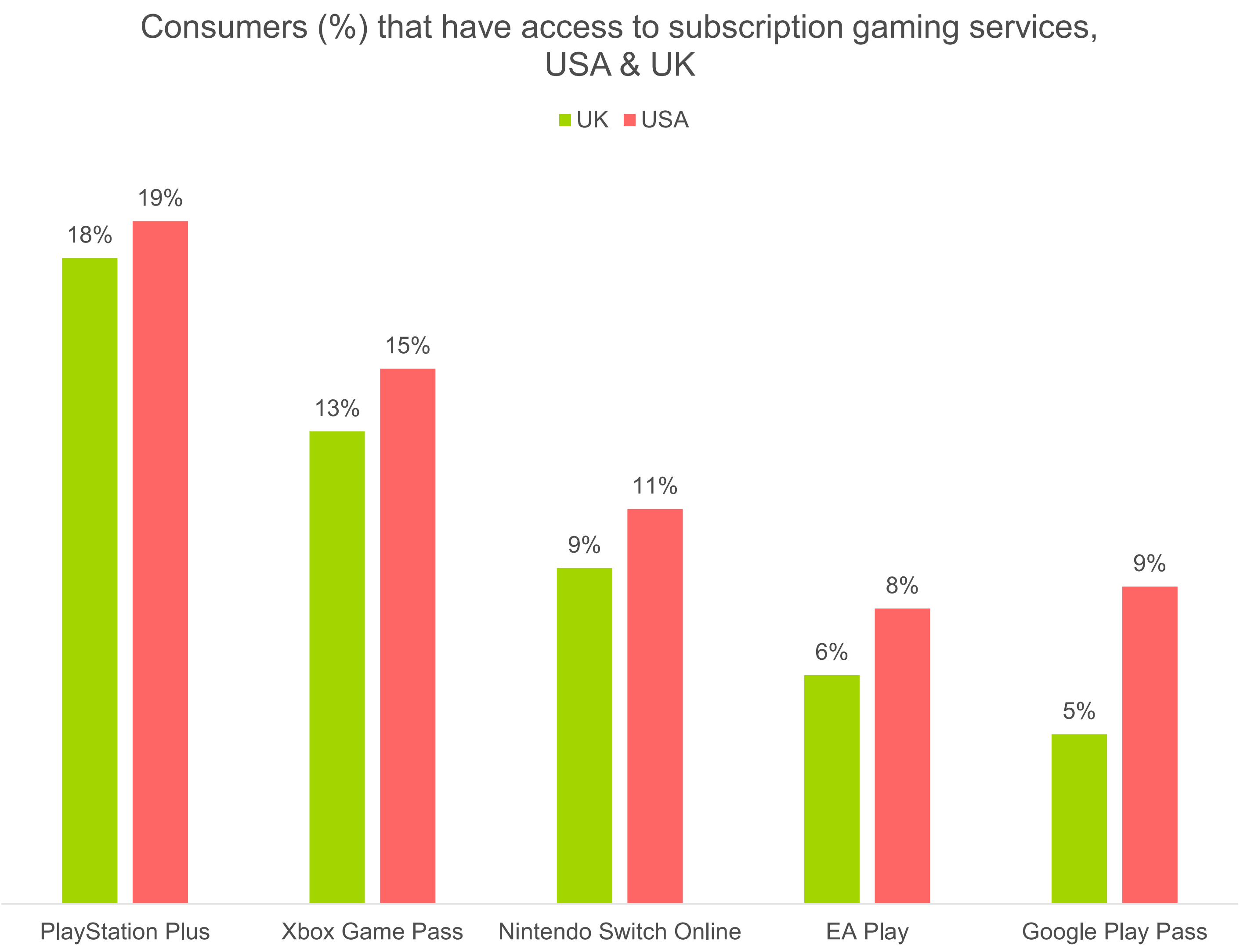
Source: Ampere Attention Economy Survey, n=2,000

In gaming, console subscription services are the most popular

- The top three platforms across both markets are console-backed subscriptions. Subscriptions are typically heavily promoted as part of the gameplay experience within consoles, allowing for features like multiplayer gaming and exclusive content

- EA Play also features in the top five. The regularity of new, popular releases like *FIFA* and *NFL Madden* make its offering appealing. Similarly, it is often included on higher tiers of other subscriptions, such as Xbox Game Pass

- The popularity of EA Play demonstrates how subscriptions can grow their reach in a crowded market through partnerships and bundling with other platforms



Source: Ampere Attention Economy Survey, n=2,000

In the UK, video and social media attract the largest audience; broadcasters are strong for older ages

Top 10 media services used, by age group, UK

Gen Alpha & Gen Z

1. YouTube
2. Netflix
3. TikTok
4. Instagram
5. Spotify
6. Snapchat
7. prime video
8. Disney+
9. Facebook
10. ROBLOX

YouTube, Netflix and TikTok are the most-used services amongst the younger generations, with other online streaming services also featuring in the top 10. Roblox is the tenth most popular media touchpoint for younger consumers, driven by Gen Alpha

Millennial

1. YouTube
2. Netflix
3. Facebook
4. Instagram
5. Spotify
6. prime video
7. TikTok
8. Disney+
9. BBC
10. BBC iPLAYER

When it comes to social and online video, Millennial preferences are broadly similar to Gen Alpha and Gen Z. Facebook is notably more popular while TikTok and Snapchat gain less attention. Broadcasters hold a more significant role, with both BBC's linear channels and online service featuring in the top 10

Gen X & Baby Boomers

1. YouTube
2. Facebook
3. Netflix
4. itv
5. BBC
6. BBC iPLAYER
7. prime video
8. 4
9. itvX
10. Instagram

The top three services remain the same as Millennials for Gen X and Baby Boomers; YouTube, Netflix and Facebook. However, the other services in the top 10 heavily feature broadcast TV, with both linear and online services by BBC and ITV making the top 10, along with Channel 4's linear channels

Source: Ampere Attention Economy Survey. Services include TV, online video, audio, gaming subscriptions, social media and Roblox, n=1,000

The USA shows a similar trend, with older audiences more likely to watch broadcast television

Top 10 media services used, by age group, USA

Gen Alpha & Gen Z

1. YouTube
2. N
3.
4. TikTok
5. f
6.
7.
8. hulu
9. prime video
10.

YouTube, Netflix and Instagram make up the top three services. Spotify is the only non-social media or online video service to be included in the top 10 list, primarily used for music streaming and podcasts

Millennials

1. YouTube
2. N
3. f
4.
5. prime video
6. TikTok
7. hulu
8.
9.
10. HBO max

YouTube, Netflix and Facebook are the top three services among Millennials. They are the only age group to feature HBO Max within the top 10 services, while other services align relatively closely with Gen Alpha and Gen Z

Gen X & Baby Boomers

1. YouTube
2. f
3. N
4. prime video
5.
6. hulu
7. CBS
8. NBC
9. abc
10. TikTok

Gen X and Baby Boomers are the only generation to feature linear TV in their top 10 services. TikTok is also within the top 10 services, showing that the service is seeing its popularity expand beyond its target younger demographic. However, YouTube remains top, highlighting its dominance across generations

Source: Ampere Attention Economy Survey. Services include TV, online video, audio, gaming subscriptions, social media and Roblox, n=1,000

Ultimately, winning attention means becoming part of consumers' routines

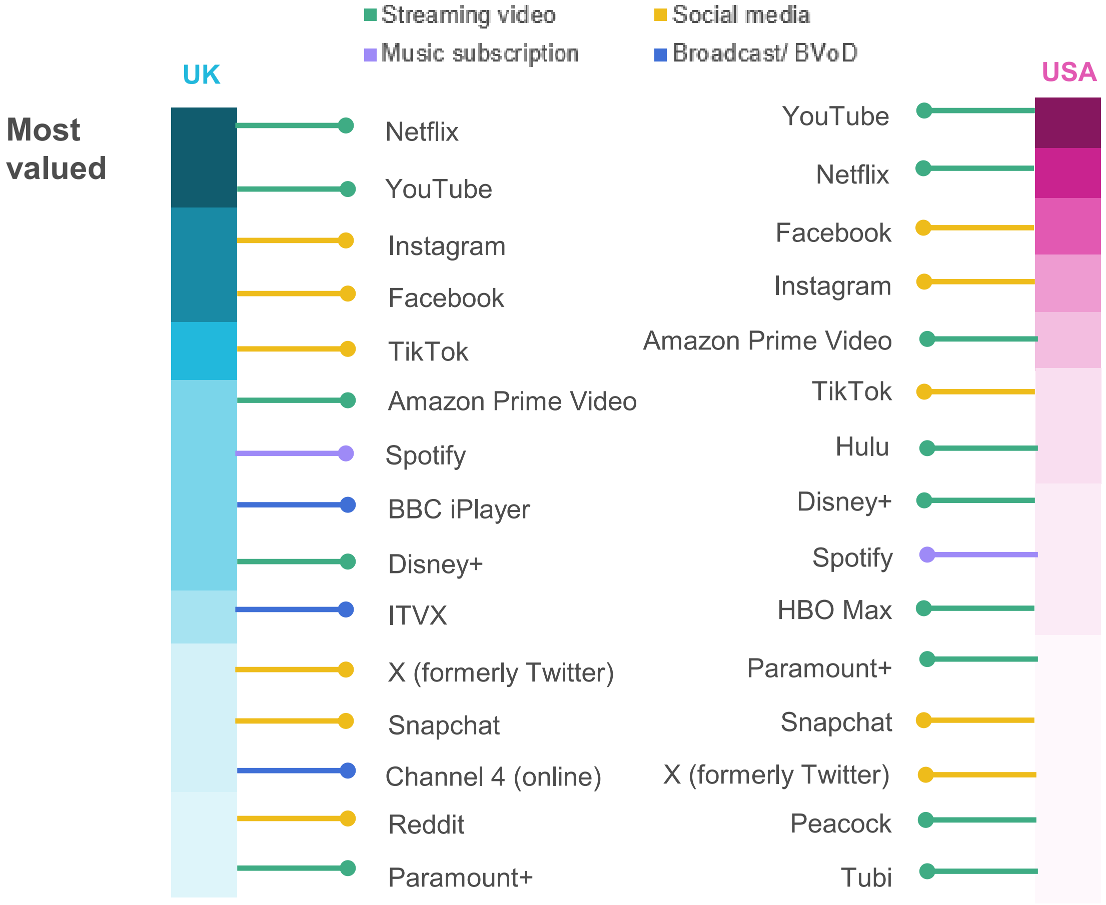
- The services consumers consider most valuable are broadly the ones they use most often, suggesting that daily relevance and habitual usage drive perceived importance in the attention economy. This shows that perceived value is driven by habit and how services fit with consumers' different needs

- A small set of platforms have become 'must-haves', despite consumers using a wide range of services. The core group, led by YouTube, Netflix and major social platforms, dominates perceived value, positioning them as default, non-replaceable parts of everyday media consumption

- Winning attention is about becoming part of routines, not just gaining reach. The alignment between value and reach shows that being present in consumers' daily habits matters when it comes to keeping them locked in and avoiding churn. Understanding the different needs that draw consumers to a service will help platforms to do this

This analysis was undertaken via MaxDiff methodology; wherein respondents repeatedly choose the most and least important services from small sets, with the objective of measuring the relative importance of different platforms. In this instance, Ampere asked consumers which of the services they have access to is most valuable to them

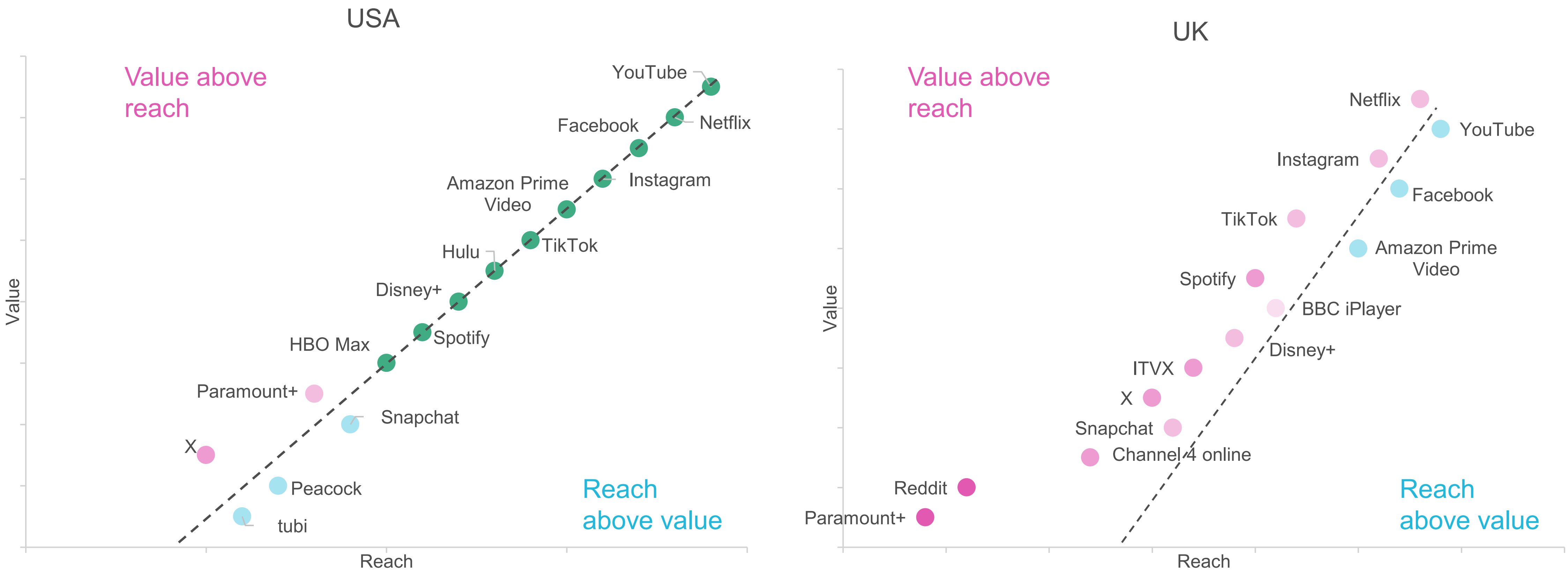
Top 15 most valued services by users



*Source: Ampere Attention Economy Survey, n=1,748. *Out of 132 services*

Usage is a clear indicator of service value, particularly in the US

Reach vs value rating for the 15 'most valuable services', USA & UK



Source: Ampere Attention Economy Survey, n=1,748

Services should focus on identifying and catering to a defined role in the attention economy

Consumers spread attention across many platforms, rather than committing to a single service. Instead, they juggle an average of 11.5 platforms per week, depending on age. This fragmentation means that being “used” is no longer enough — platforms must earn a distinct, repeatable place in weekly routines or risk being deprioritised as attention becomes more constrained

There is no single winning model; different offerings can all achieve reach. Across video, audio, social and gaming, very different propositions coexist successfully: linear and on-demand, paid and free, long-form and short-form. The implication for services is strategic rather than tactical; they need to decide what role to play in consumers’ lives and optimise for that role

Value matters as much as reach. A small group of platforms consistently over-index on perceived value relative to their reach, becoming non-negotiable “must-haves” in the attention economy. Others achieve scale without the same depth of importance, leaving them more vulnerable to substitution or churn. Winning attention long-term depends on converting reach into perceived value through habit, relevance and routine

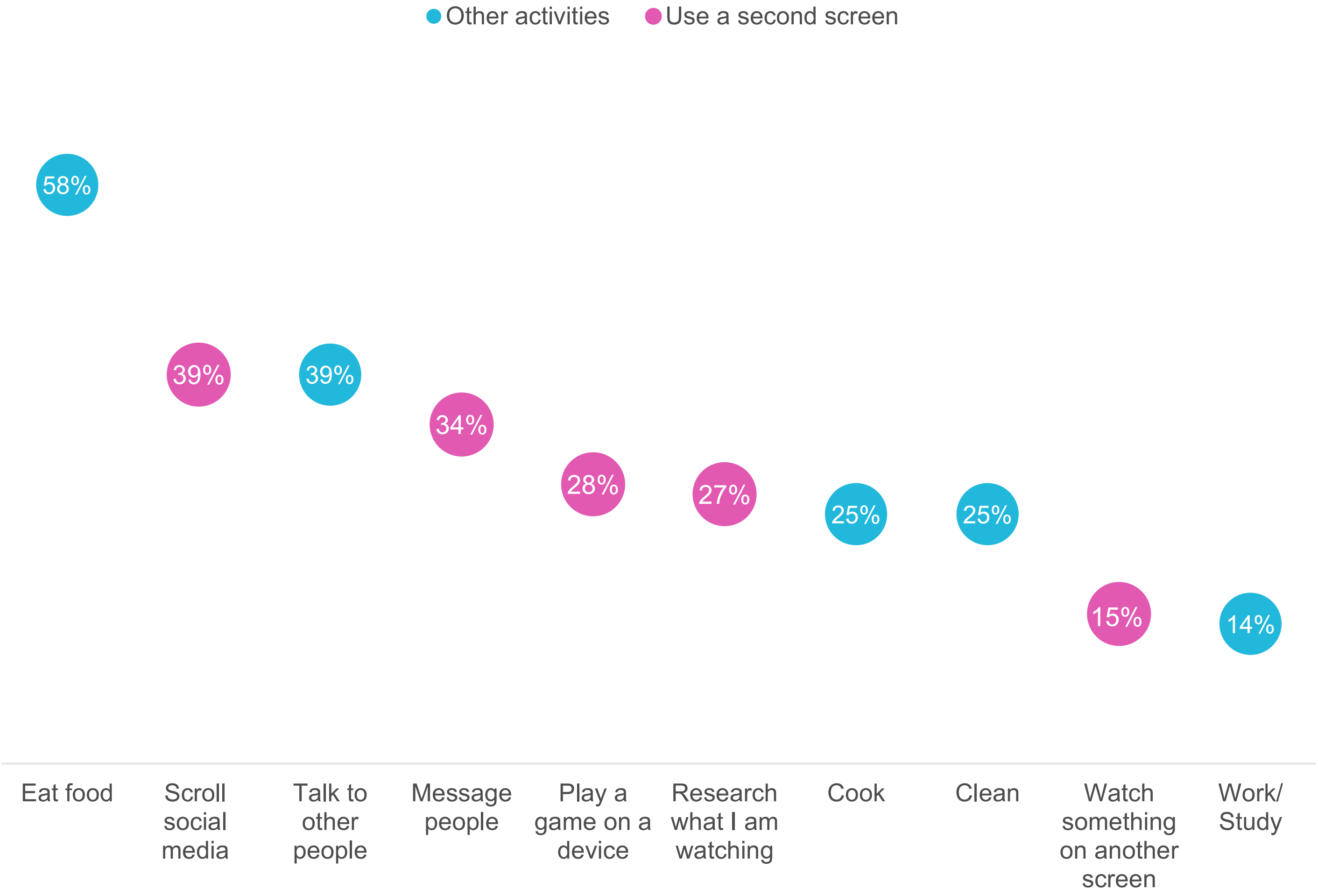
Quality of attention

Reach alone does not guarantee attention; context, multitasking and mindset determine engagement

- When watching TV shows, movies or sport, consumer attention is often split with other activities. Content is used as background to doing other things such as cooking, cleaning and working, while using another screen at the same time is also popular. This suggests that while reach of video such as TV and online streaming is high, not all engagements can be considered highly attentive

- Broadcasters and streamers can take advantage of this second-screening behaviour. Many sports broadcasters are gamifying sports coverage with examples like Fox Sports' 'Super 6' predictions game via the Fox Sports app, which gives fans the chance to win money by predicting certain outcomes across its coverage

Consumers (%) engaged in other activities, by activity, while watching content, USA & UK



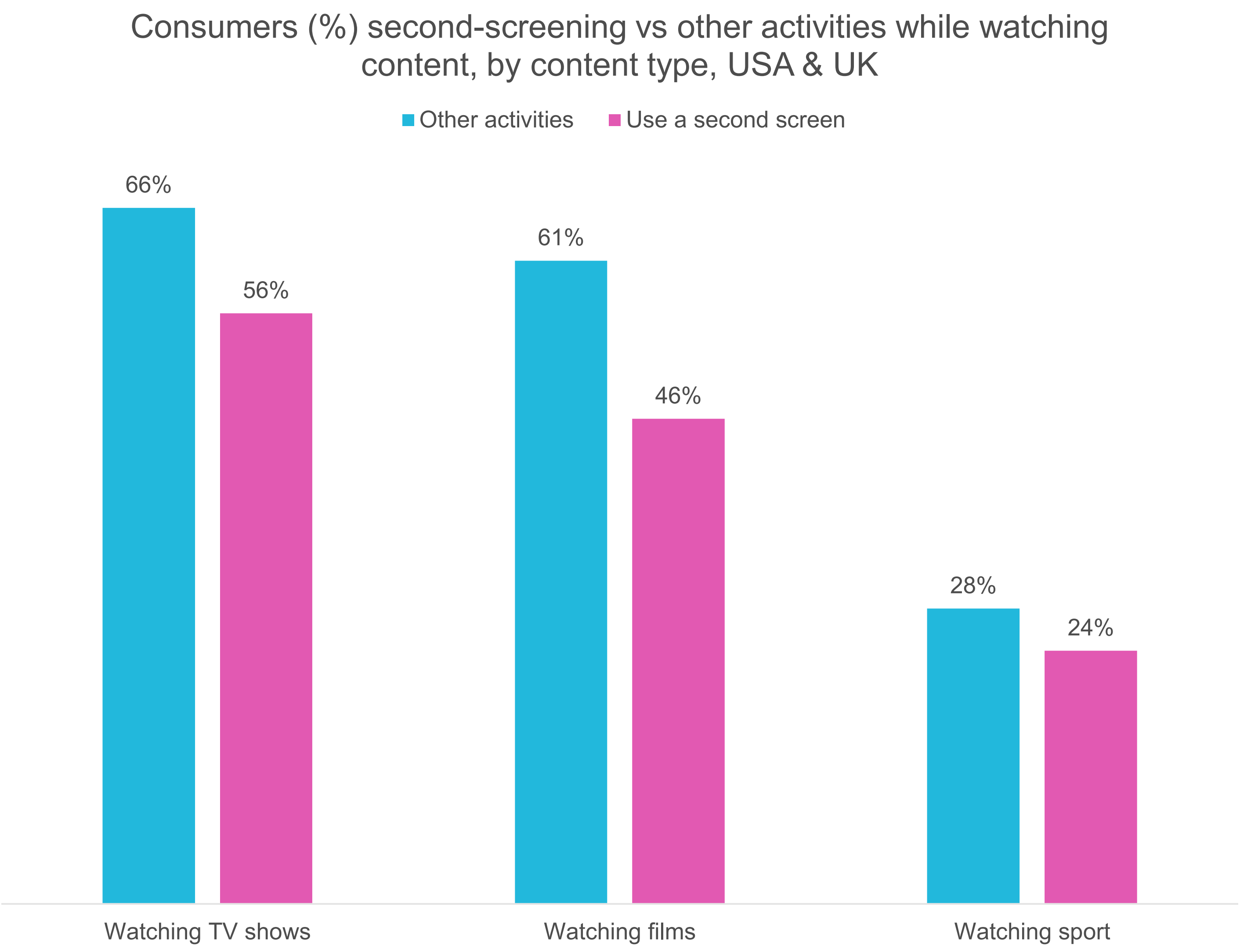
Source: Ampere Attention Economy Survey; respondents ages 18-64 (n=1,748)

Not all viewing delivers the same level of attention, with sports and movies holding more intentional viewing experiences

- When it comes to different types of content, movies see the lowest incidence of second-screening, while TV shows more commonly see both second-screening and other activities happening at the same time

- Broadcasters of TV shows can lean into this style of viewing, with easy-to-follow genres like Reality likely to fit well with dipping in and out of a show. Bingeable series with multiple episodes, or platforms with strong, recommendation-based autoplay features could also prove to be a draw for consumers

- Offering more attentive content, such as live sport and immersive film can allow media platforms to achieve a balance across background-friendly content and active viewership

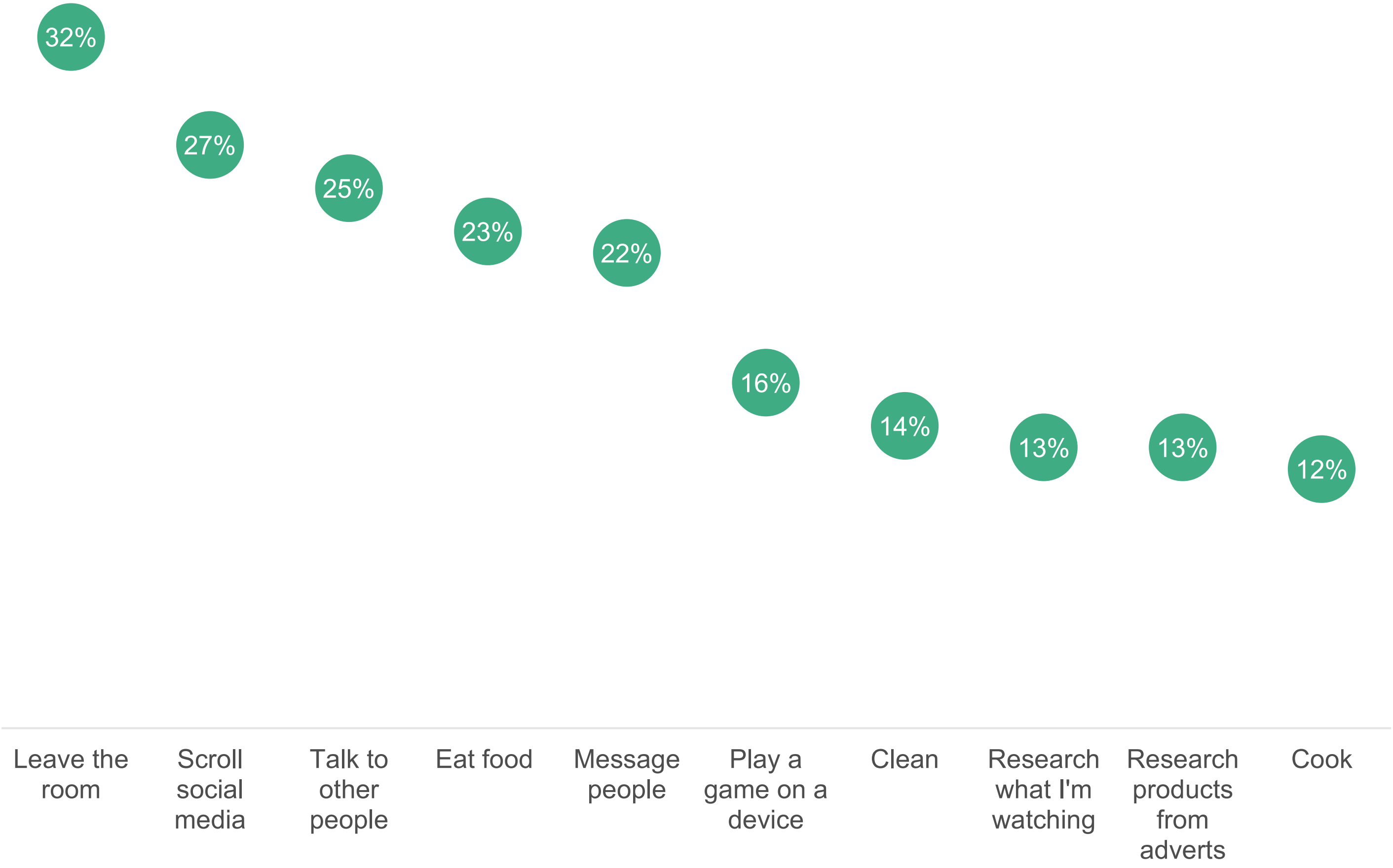


Source: Ampere Attention Economy Survey; respondents ages 18-64 (n=1,748)

Even highly-viewed content faces attention challenges, with almost a third of consumers leaving during ad breaks

- Consumers are also distracted during advertising breaks, with leaving the room topping the list of things viewers do while watching
- The attentiveness of viewing is key for advertisers. Metrics like content completion rates and viewing figures are less meaningful on their own. Brands are already looking to navigate the issue of attention, with interactive adverts, QR codes and measurement of further search activity on companion devices serving to provide a measure of attention
- This has cross-media implications, with platforms compatible with more advanced ad formats, receiving higher levels of attentive viewing and effective measurement solutions, at an advantage

Consumers (%) engaged in other activities, by activity, during advertising breaks, USA & UK

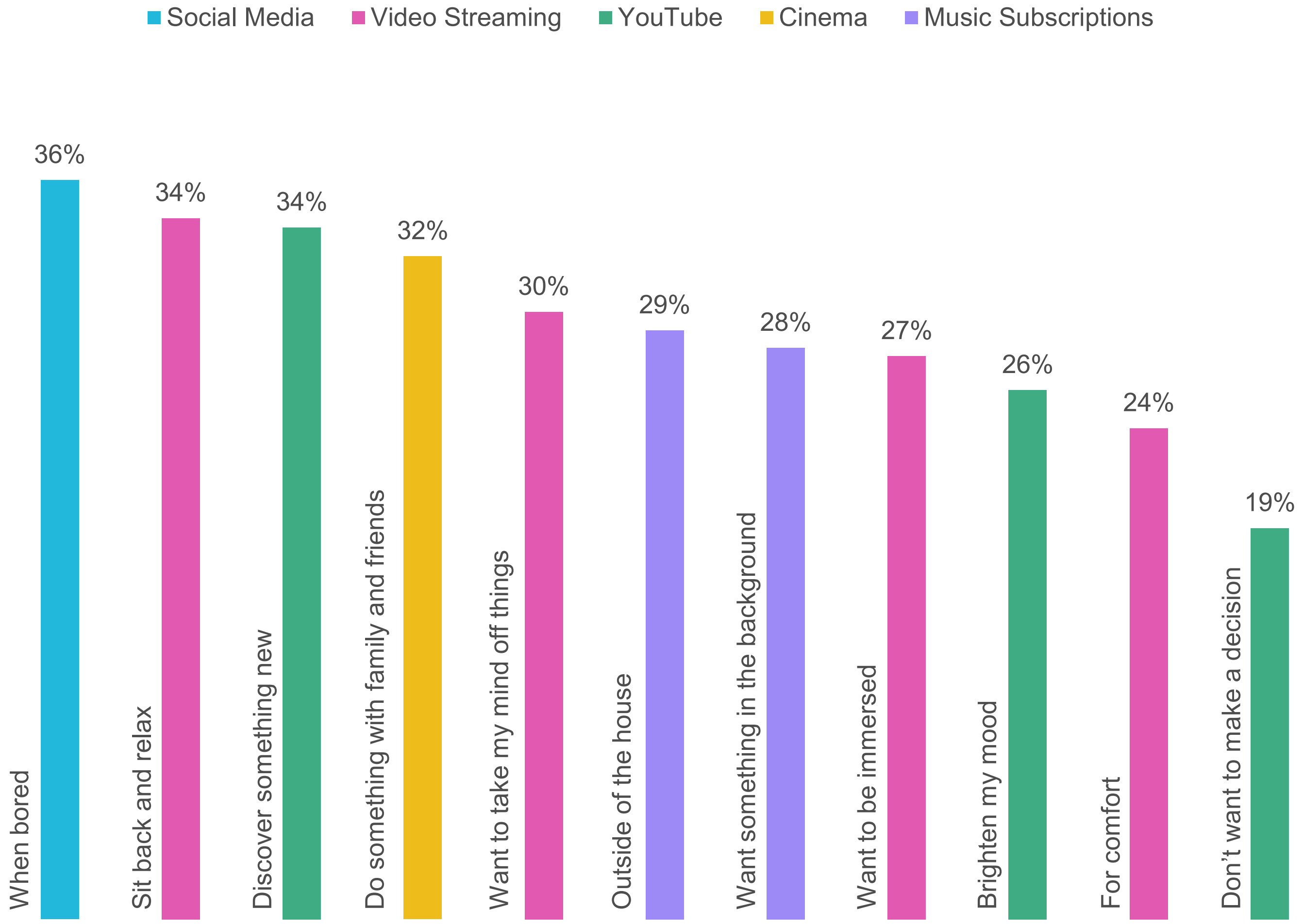


Source: Ampere Attention Economy Survey; respondents ages 18-64 (n=1,748)

The media consumers turn to for different needs are varied, showing there is a place for different experiences

- The need states that consumers approach different media touchpoints with can provide insight into how attentive viewing is likely to be, allowing platforms to ensure their content strategy matches the demand
- When consumers are looking for something that immerses them and captures their attention, they are most often driven to online streaming services. Audio services are more commonly used for times when consumers want something on in the background or while they are out of the home
- This suggests that for video services, providing highly captivating movie content or live sports will be a draw for consumers. Whereas for audio services, features like effective algorithm-driven autoplay are key

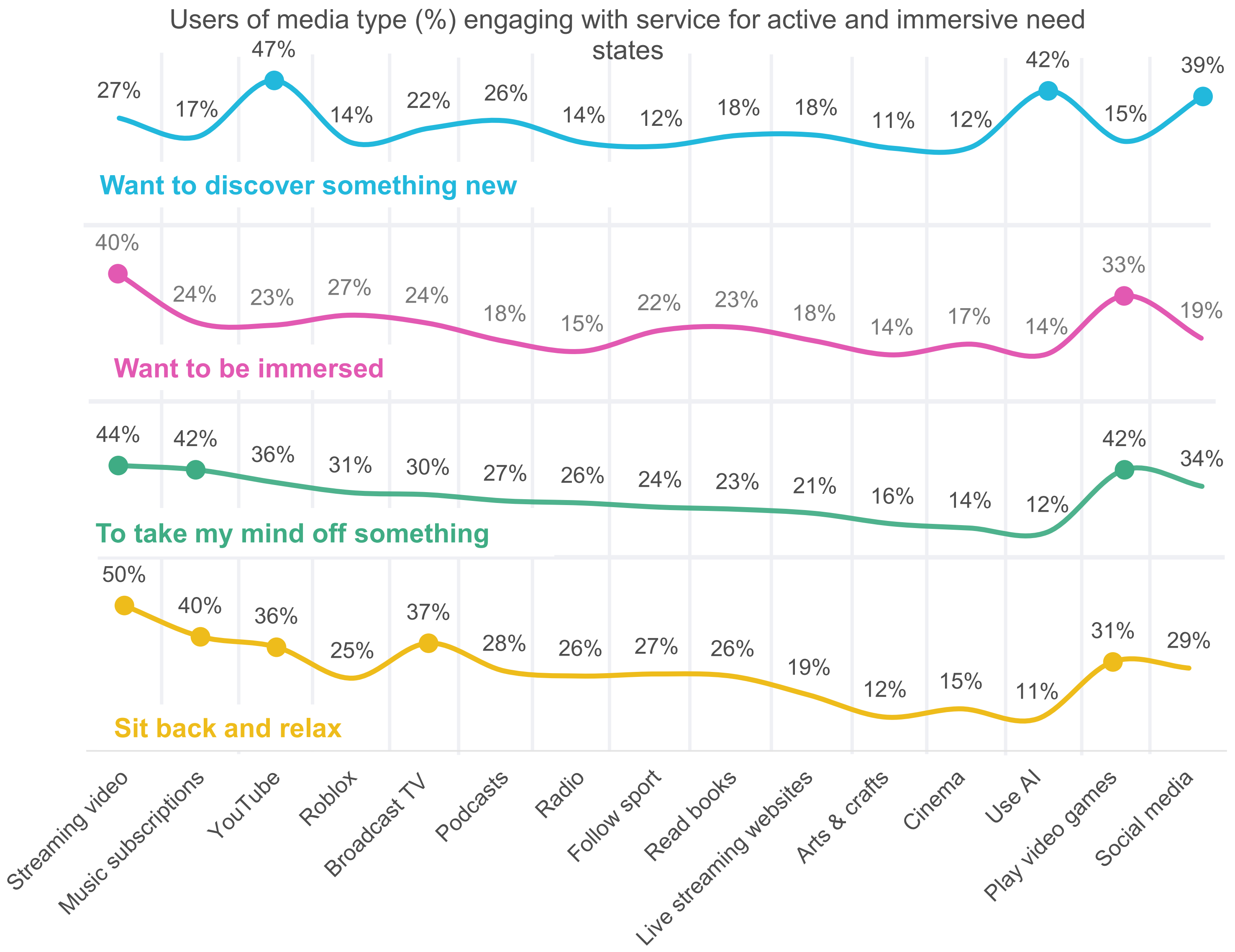
Consumers (%) that use media type for specific need states, USA & UK



Source: Ampere Attention Economy Survey, n=2,000

Video and gaming emerge as the leading choices when consumers seek fully immersive experiences

- When it comes to sitting back and relaxing, it's not only streaming video that scores highly but other types of video service, such as broadcast TV and YouTube, and playing video games
- For discovery, AI services like ChatGPT are popular among their users. Video platforms are increasingly incorporating AI-powered search and recommendations to meet this need within their own ecosystems
- In 2025, Netflix launched an opt-in beta of a generative AI search tool that allowed users to find content using conversational prompts such as "I want something funny and upbeat". By making discovery more intuitive, platforms can help users find relevant content without leaving the service, reducing the risk of losing attention to competing platforms



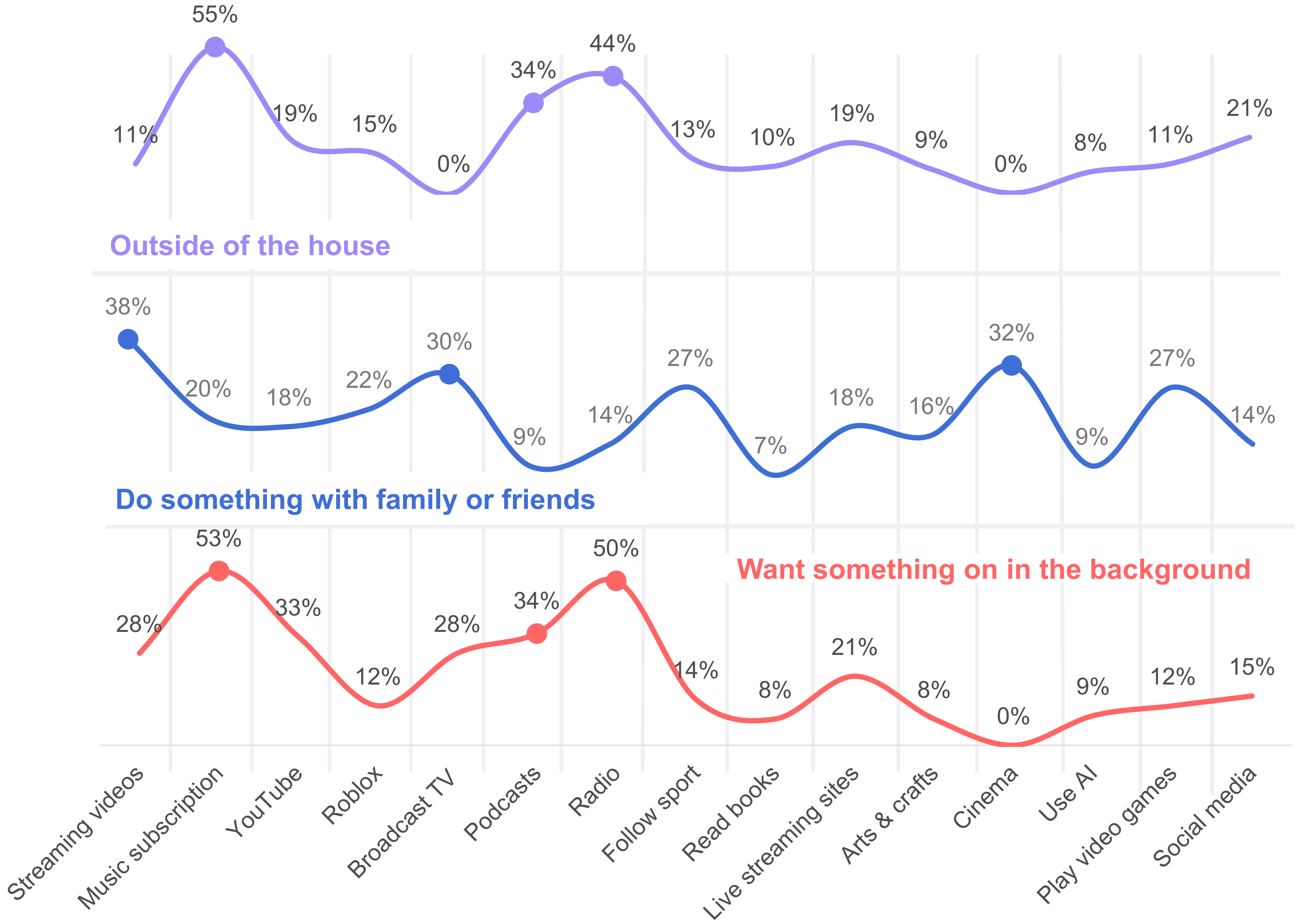
Source: Ampere Attention Economy Survey, n=2,000

Audio services play a distinctive role, particularly when consumers are outside the home or looking for background noise

- For background and when outside of the house, non-visual formats are popular. Podcasts are working to move beyond background listening and into more attentive viewing categories, with many now having a video element. This is proving successful, with 52% of consumers mostly watching podcasts, rather than just listening, showing that by diversifying content delivery outputs, different media can appeal to multiple need states

- Cinema still plays a big role when it comes to spending time with family and friends. Following a turbulent period with Covid-19 lockdowns leading to a decline, Ampere's Media Consumer data has shown consistent growth in cinema visits in the UK and USA. Need states suggest that social experiences remain at the forefront of this resurgence

Users of media type (%) engaging with service for background need states



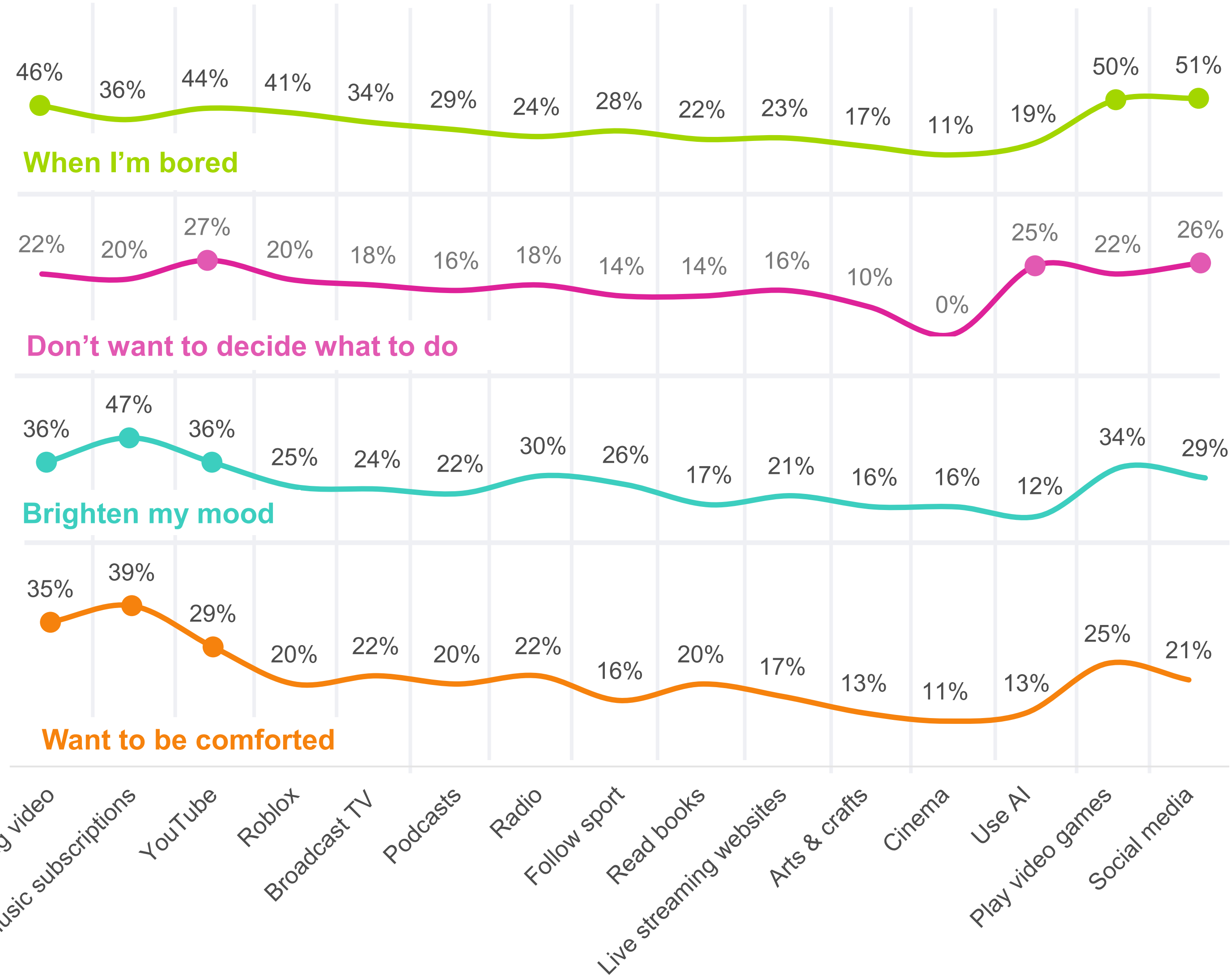
Ampere Attention Economy Survey, n=2,000

Social media fills moments of low intent, becoming the default choice when consumers are bored or unsure what to do

- Boredom need states lean into the nature of social media scrolling. Platforms like TikTok and Instagram have an algorithm that means that platforms can deliver an almost infinite amount of relevant content to users. Other platforms can capitalise on this by using their own social media presence, with SVoDs like Amazon Prime Video, Netflix and Disney+ already creating their own short, vertical video clip formats

- Streaming video is also significant in comfort and mood brightening, benefitting from a viewer's ability to deliberately choose titles that make them feel good. Playlist categories that focus on mood will benefit streaming services by leaning into what consumers are seeking

Users of media type (%) engaging with service for emotional need states



Source: Ampere Attention Economy Survey, n=2,000

Media choices are consistent across age groups, with differences emerging in low-intent moments

Top service type used for need states by users of media type, by age group, USA & UK

	Sit back and relax	Want to be immersed	Want to be comforted	Want to discover something new	Want something on in the background	Do something with my family or friends	Brighten my mood	Don't want to decide on what to do	When I am outside of the house	Want to take my mind off things	When I'm bored
Gen Alpha	Music subscriptions	Video games/ game apps	Music subscriptions	YouTube	Music subscriptions	Streaming services	Music subscriptions	Video games/ game apps	Music subscriptions	Video games/ game apps	Video games/ game apps
Gen Z	Streaming services	Streaming services	Streaming services	Social media	Music subscriptions	Streaming services	Music subscriptions	Use AI	Music subscriptions	Streaming services	Social media
Millennials	Streaming services	Streaming services	Music subscriptions	YouTube	Music subscriptions	Streaming services	Music subscriptions	YouTube	Music subscriptions	Video games/ game apps	Video games/ game apps
Gen X/ Baby Boomers	Streaming services	Streaming services	Music subscriptions	YouTube	Listen to the radio	Streaming services	Music subscriptions	Social media	Listen to the radio	Streaming services	Video games/ game apps

Source: Ampere Attention Economy Survey, n=2,000

Consumers turn to media for multiple needs, which services should strive to meet

High reach is not a guarantee of high attention. While watching video, consumers are often doing other things, such as second-screening on a smartphone. Capitalising on this with features like companion apps can capture consumers across both screens

There are clear differences in where consumers turn for different needs. Platforms should ensure that they understand the need state that they cater to and that they optimise their offering to satisfy these needs

Balancing their content offering will help video services cover themselves for different levels of attentiveness. Movies and sport are there for when consumers want to be absorbed, whereas easy-viewing TV series allow them to stay in the mix for background viewing

Platforms can also attempt to cater to a wider variety of needs by diversifying their offering, for example with video services offering AI search tools, short-form vertical video and video podcasts to go beyond immersion and into more laid-back and background needs

The problem of attentiveness creates issues for marketers, with reach not always a measure of effectiveness. Platforms that can align themselves with metrics that better show attentiveness put themselves at an advantage

Touchpoints driving purchase intent

Each media type is monetisable across reach, engagement and need states

- The modern media landscape is splintered. The populations of the USA and UK divide their attention among several media types that have varying reach, engagement, value, and ultimately monetisation opportunities for broadcasters and advertisers
- Advertisers specifically should be cognisant of the increasing variety of advertising opportunity within the fragmented attention economy of media
- For example, aggregating select data for USA/UK Gen Z from Ampere's Attention Economy Survey illustrates the differing roles of streaming, social media, AI, and music streaming in the media diet of a young person.
- Where perhaps social media holds more viewing time than media, music subscriptions are more often used when feeling happy. Such characteristics may determine that an advert on a music service may be optimal for a brand looking to associate with positivity, for example. In short, viewing time alone does not determine supremacy of a media platform in the modern attention economy

Gen Z sample media attention breakdown, USA & UK

	Streaming services	Social media	Use AI	Music subscriptions
Most used when need state is:	Want to be comforted	Want to discover something new	Don't want to decide on what to do	Brighten my mood
Average time spent daily:	1 h 53 m	1 hr 54 m	29 m	1 h 20 m
Proportion using weekly:	63%	67%	35%	60%

Source: Ampere Attention Economy Survey

Streaming services rank low among purchase intent items as USA & UK markets plateau

- Ampere asked respondents what products they bought in the past year, and what products they plan on purchasing over the next year

- Across the USA and UK, food & drink, beauty & self-care, and alcohol were most cited. Travel and device purchases were relatively higher on most intended purchases compared to in the past year. Macroeconomic conditions may have incrementally limited such big purchases in the past year, with consumers having a more positive financial outlook in the coming year

- Streaming services fell to the bottom of both lists, reflective of the plateau of streaming stacking rates and fatigue of the saturated markets. Ampere found that consumers are increasingly replacing existing streaming services rather than making additions to their current digital basket

Consumers (%), past vs future purchases, by product category, USA & UK

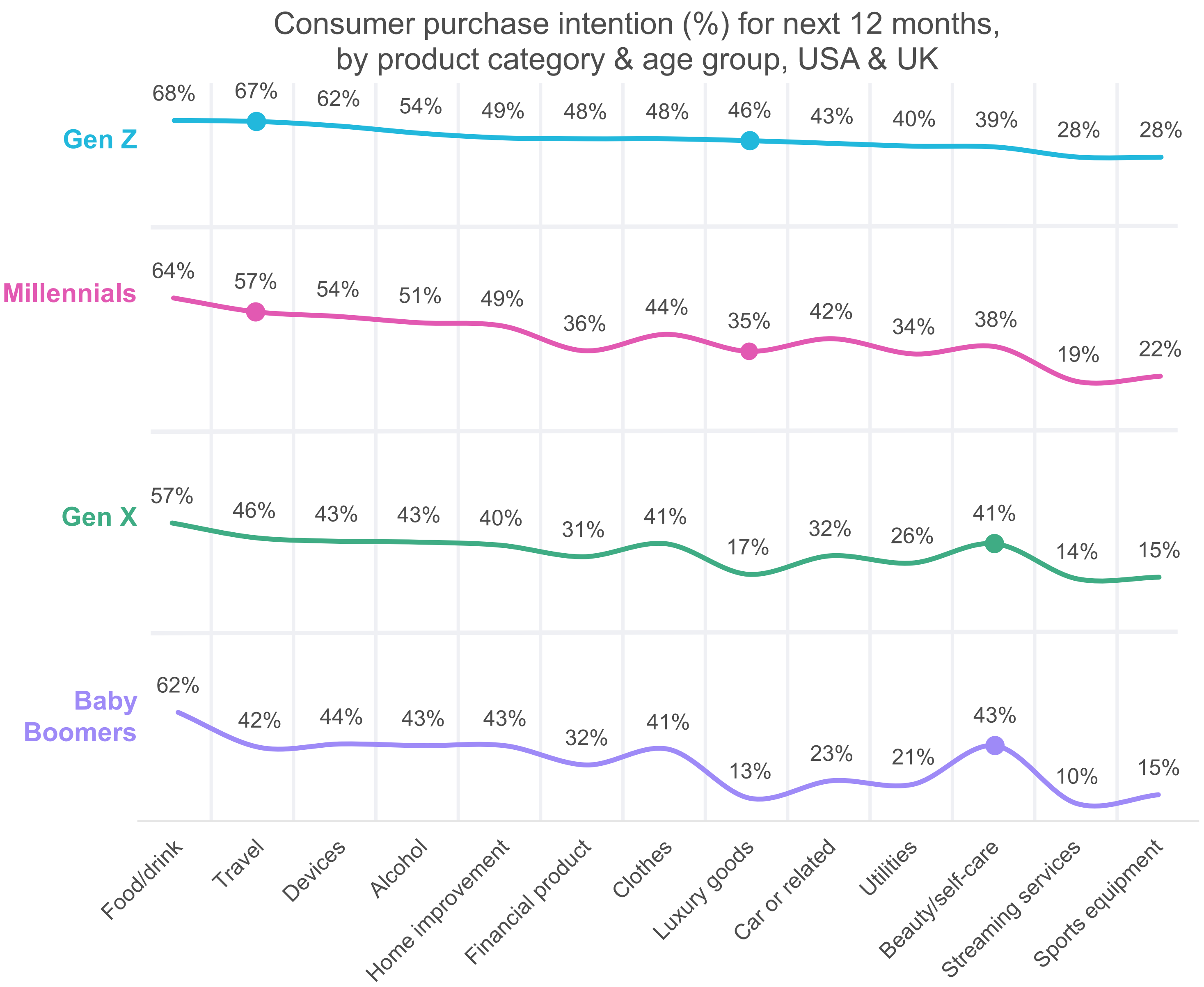
Purchases made past year	
Food/drink (non-alc)	**93%**
Alcohol	**70%**
Beauty/self-care	**66%**
Clothes	**61%**
Devices	**57%**
Travel	**57%**
Home improvement	**54%**
Financial products	**51%**
Cars or related	**39%**
Utilities	**36%**
Luxury goods	**34%**
Streaming service	**31%**
Sports equipment	**26%**

Purchase intent (coming year)	
Food/drink (non-alc)	**62%**
Travel	**55%**
Devices	**52%**
Alcohol	**48%**
Home improvement	**46%**
Clothes	**44%**
Beauty/self-care	**39%**
Cars or related	**38%**
Financial products	**37%**
Utilities	**32%**
Luxury goods	**31%**
Sports equipment	**21%**
Streaming service	**19%**

Source: Ampere Attention Economy Survey; respondents ages 18-64 (n=1,748)

Younger people over-index for purchase intent on travel, luxury, utilities, and streaming services

- Segmenting purchase intention by generation allows us to analyse which purchases different age groups aim to prioritise in the coming year
- Gen Z and Millennials over-index for travel, luxury goods, and streaming services while Gen X and Baby Boomers over-index for beauty products
- Advertisers looking to sell these product groups should take heed to focus resources into media type that skew towards these groups. For example, music services and YouTube are used more often per week by younger segments



Source: Ampere Attention Economy Survey; respondents ages 18-64 (n=1,748)
Gen Z cohort for this question excludes Gen Z age 16-17

Word of mouth and discounts still exceed advertising in purchase decision influence

- Purchase motivators vary slightly for common household buys compared to larger ‘one-off’ items like cars or luxury goods. Namely, consumers making big purchases place more weight with online reviews and friends and family recommendations

- Notably, despite AI usage becoming more prevalent, AI recommendations for products fall to the bottom of the purchase influence hierarchy in both instances. Given the information-gathering capabilities of AI, it would stand that effectiveness of this technology could be currently under-used by consumers

Consumers (%) that cited purchase motivators
by product type, USA & UK

‘Common’ purchase motivators	
Previously purchased product	**44%**
Saw in a shop (in-person/online)	**30%**
Discounted product	**28%**
Friends/family recommendation	**26%**
Social media advertising	**17%**
Saw an online review	**16%**
TV or streaming advertising	**15%**
YouTube advertising	**13%**
Other advertising	**10%**
Influencer recommendation	**8%**
AI recommendation	**7%**

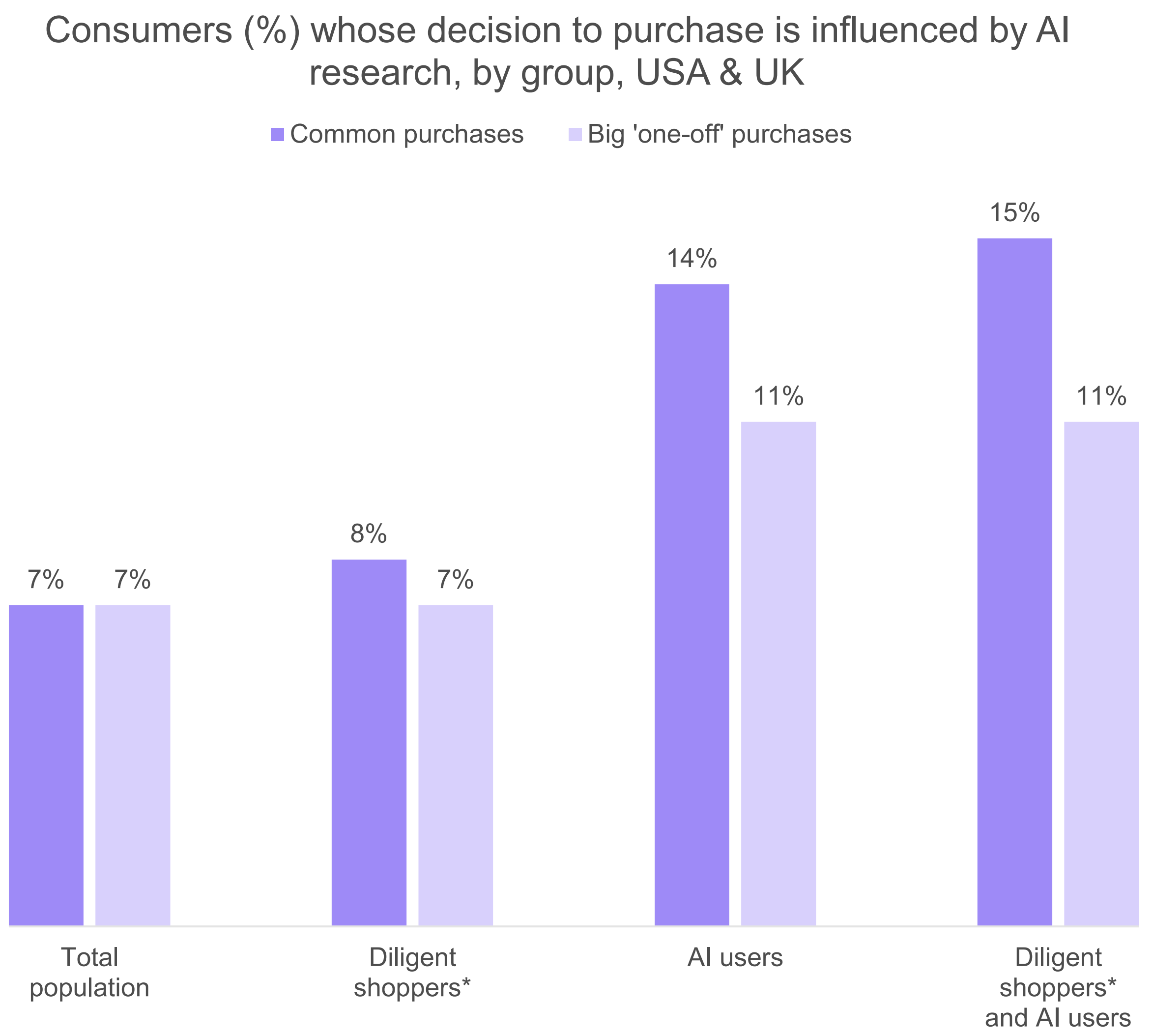
Big ‘one-off’ purchase motivators	
Previously purchased product	**26%**
Friends/family recommendation	**25%**
Discounted product	**24%**
Saw an online review	**20%**
Saw in a shop (in-person/online)	**20%**
Social media advertising	**14%**
TV or streaming advertising	**13%**
YouTube advertising	**13%**
Other advertising	**12%**
Influencer recommendation	**9%**
AI recommendation	**7%**

Source: Ampere Attention Economy Survey; respondents ages 18-64 (n=1,748)

Even among diligent shoppers, AI has yet to be widely adopted as a consumer research tool

- Only 7-8% of consumers who 'shop around' or undertake research to find deals currently use AI tools to inform purchase decisions. Examining the segment of such 'diligent shoppers' who also tend to use AI on a weekly basis, only 15% claim that AI research is an influencing factor in common purchases (and 11% for big one-off purchases)

- As mentioned in the first section of this report, AI tools like ChatGPT are beginning the rollout of sponsored results and adverts. As AI usage continues to increase, companies looking to advertise could use such ad spots to bring product awareness to diligent AI-using shoppers



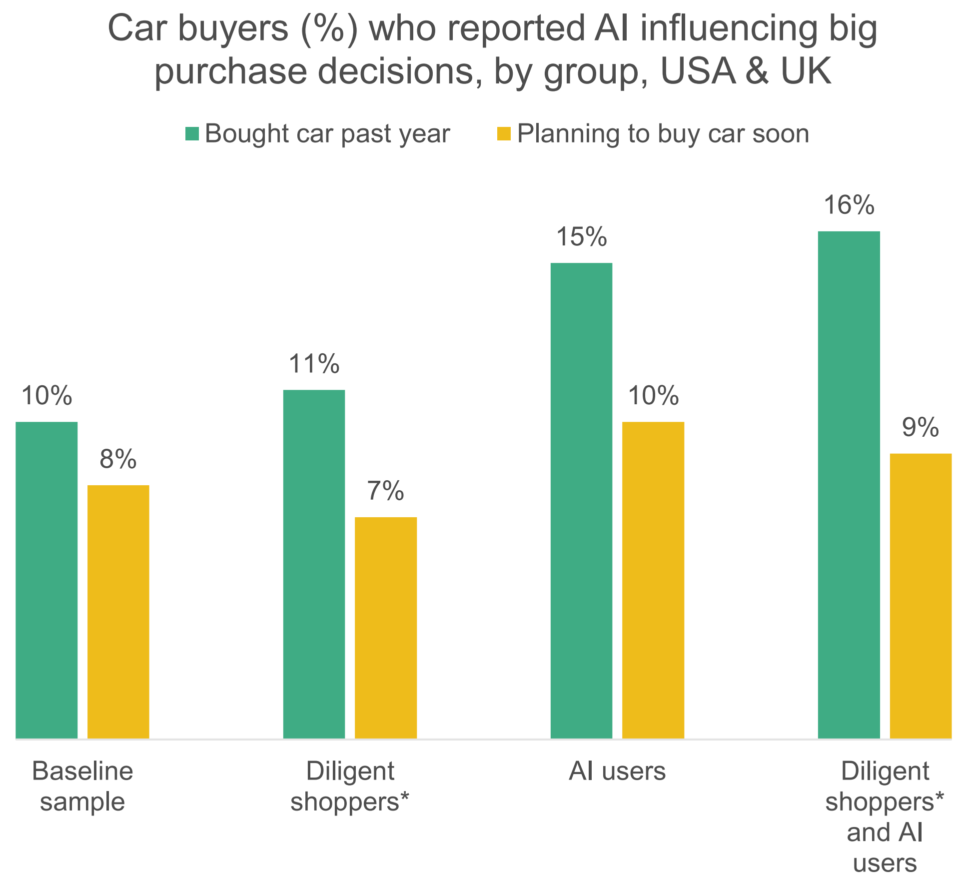
**Respondents who agree with statement "I like to shop around and do research for the best deal"*
Source: Ampere Attention Economy Survey; respondents ages 18-64

Case study: AI research for car purchasing appears to be trending upward

- While AI usage for purchase decisions remains relatively low compared to other purchase influencers like advertising and word of mouth, data for car purchasers suggests that AI research for product purchasing has not yet reached its full potential

- Buying a car is notoriously one of the most complex, opaque and difficult purchases a consumer can make. Hypothetically, the capabilities of LLM models to gather information and generate analysis on a given topic aligns with the car-buying process to offer value to the consumer

- Those who have bought a car in the past year consistently reported higher AI purchase influence than those who plan on buying in the next year. In other words, those who have recently gone through the car buying process have reported value in AI research that the soon-to-buy cohort may likely discover, reflecting the upward trend of AI usage in consumer product research



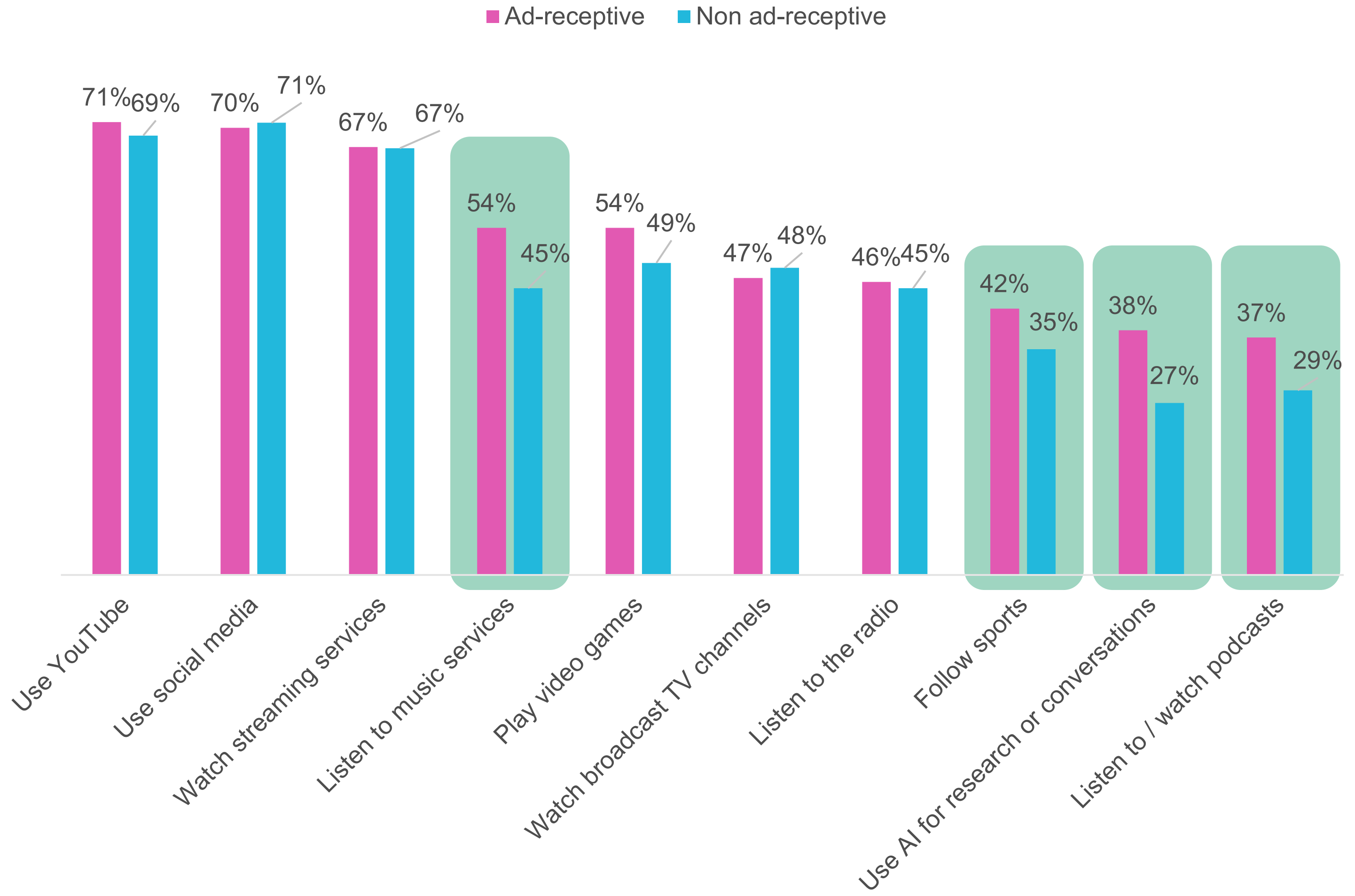
**Respondents who agree with statement "I like to shop around and do research for the best deal"*

Source: Ampere Attention Economy Survey; respondents ages 18-64

Ad-motivated consumers are more likely to use music services, follow sports, use AI, and consume podcasts

- Those who are motivated to make common or luxury purchases after seeing adverts are more likely to engage with music services, sports, AI and podcasts
- This suggests that adverts on such spaces can be particularly valuable to advertisers, as typically these consumers are ad-receptive
- Music services and podcasts offer a unique value proposition to advertisers. Music and podcast listening habits can vary greatly from consumer to consumer, and thus provides enhanced opportunity for ad-targeting

Consumers (%) motivated to buy products from advertising, by media habits, USA & UK



Filtered sample consists of those who have bought products from TV, streaming, YouTube, social media, or influencer ads
Source: Ampere Attention Economy Survey; respondents ages 18-64

Case study: Podcasts possess a unique, valuable ethos compared to other forms of media

- Having established that ad-receptive groups are more likely to listen to podcasts, the format's place within the media landscape warrants further examination. Podcasts adapt and thrive within different avenues of modern internet media. They exist as audio on music services, as long episodes on YouTube, as scrollable vertical video on TikTok, and more recently, as video programming on SVoD services like Netflix. (Ampere finds that 52% of the podcast audience tends to watch video podcasts, while 30% tends to listen to podcast audio)

- Going further, the content of podcasts operates with a similar dynamic flexibility. From humor, to news, to interviews, to social trends, podcasts cover a wide range of potential topics befit to the user by the algorithm. The wide range of both their content and their medium makes podcasts a highly compatible algorithmic ingredient for the likes of YouTube, TikTok and Spotify

- In addition to such algorithmic content assignment, podcast advertisers can also benefit from the ethos of the podcast: 17% of listeners like keeping up with the personal lives of their favorite podcasters. This denotes a parasocial relationship, and as a result, ads read by these podcasters carry a value akin to word of mouth

Top reasons for listening among podcast audiences (%), USA & UK

Source: Ampere Attention Economy Survey; respondents ages 18-64

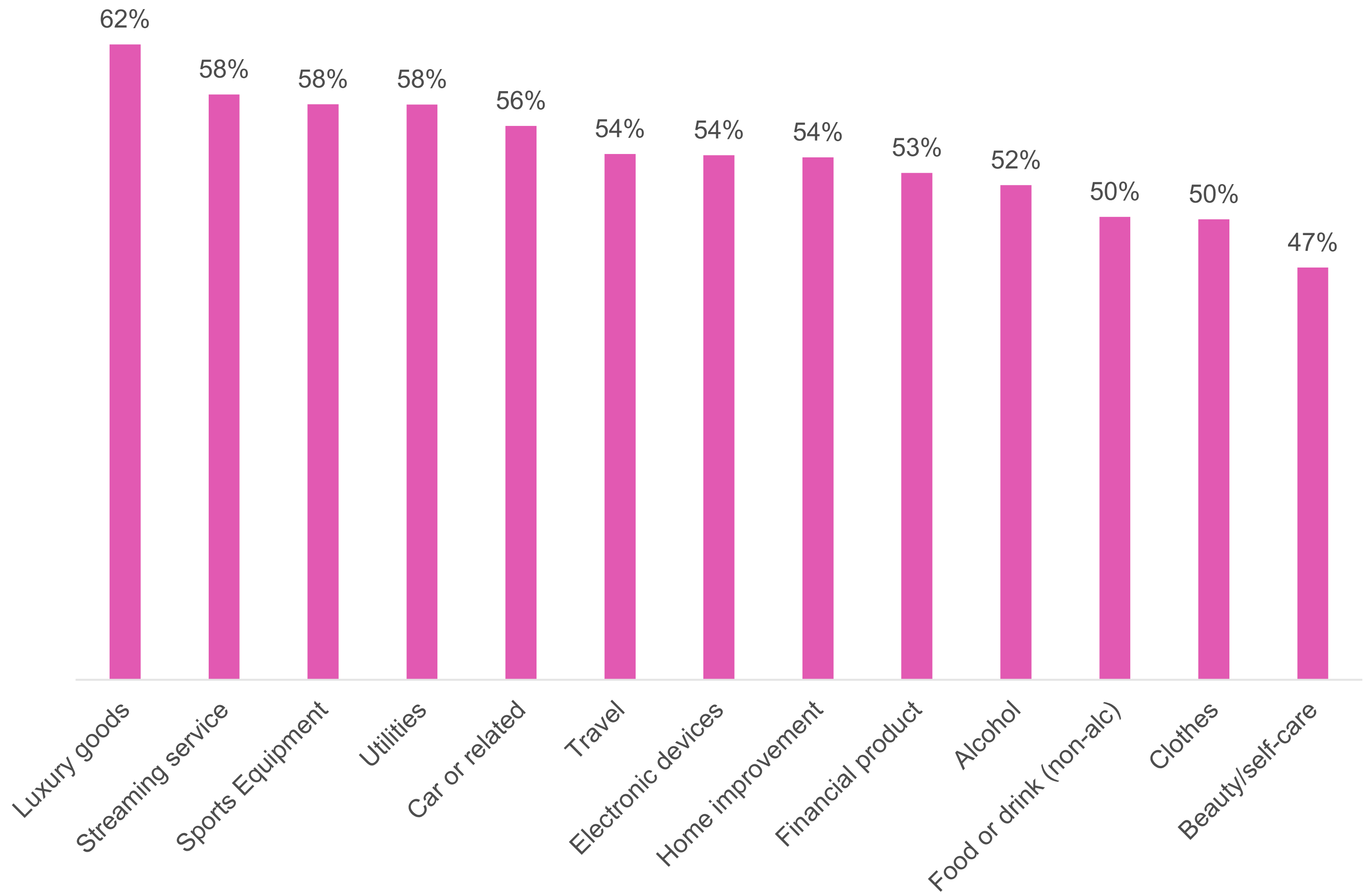
People intent on purchasing luxury goods and streaming services are most likely to use QR codes

- Respondents in the Ampere Attention Economy Survey were asked if they were likely or unlikely to scan QR codes for adverts relevant to their consumer demands

- Among the various consumer groups looking to purchase different product types, consumers intent on purchasing luxury goods, streaming services, sports equipment, and utilities (like phone plans) recorded the highest proclivity to scan QR codes

- Advertisers in these sectors should take special heed to include QR codes in their spots

Intended purchasers (%), by product type, likely to view QR-code advertising, USA & UK



Source: Ampere Attention Economy Survey; respondents ages 18-64

Preference of media type impacts not just audience age, but purchase interests and intent

Younger consumers in the USA and UK intend to spend more on travel and luxury goods than older generations in the next year, while older generations over-index for intent to purchase beauty and self-care items. Online reviews and word of mouth are relatively more important factors for large purchases compared to common items

Currently, AI consumer research ranks near bottom of the hierarchy of factors influencing purchases decisions. Consumers may start to use AI's ability to research purchase decisions more, as evident by the rate of use by car buyers within the past year

Consumers who cite having bought products from advertisements are more likely to listen to music services, watch sports, use AI, and consume podcasts. As such, these platforms should be seen as holding an especially valuable audience for advertisers

Podcasts specifically are a microcosm of the modern internet media landscape. Their dynamic nature (in both form and content) allows wide reach through ubiquitous platform algorithms. Podcasts also possess a unique ethos compared to other media that advertisers should view as valuable

Any questions?

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