The global media landscape

Analyzing how the pandemic has changed media habits

GWI.

In this report

Introduction

Even before COVID-19, media was in a state of flux. There was growing recognition of "the attention economy" whereby providers increasingly realized they were all in competition for consumers' time, and not just with their peers.

In this report we've put the numbers to these recent developments, to figure out how consumers spend their time, and how their attention can be gained, retained, and monetized.

The report is written with media planners in mind, but we anticipate the insights within will also be valuable to anyone seeking guidance on changing media habits during a pandemic. We have broken down many of our over-time charts into halves and quarters, to best see how 2020 developed, and to help see which lockdown behaviors will revert, and which will sustain.

To identify future trends, we look for clues in three places: in changes over time, in younger age groups, and in markets where rapid digital adoption can herald wider changes (for an example, look no further than TikTok).

Methodology

All figures in this report are drawn from GWI's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle-East and Africa, and the Asia-Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

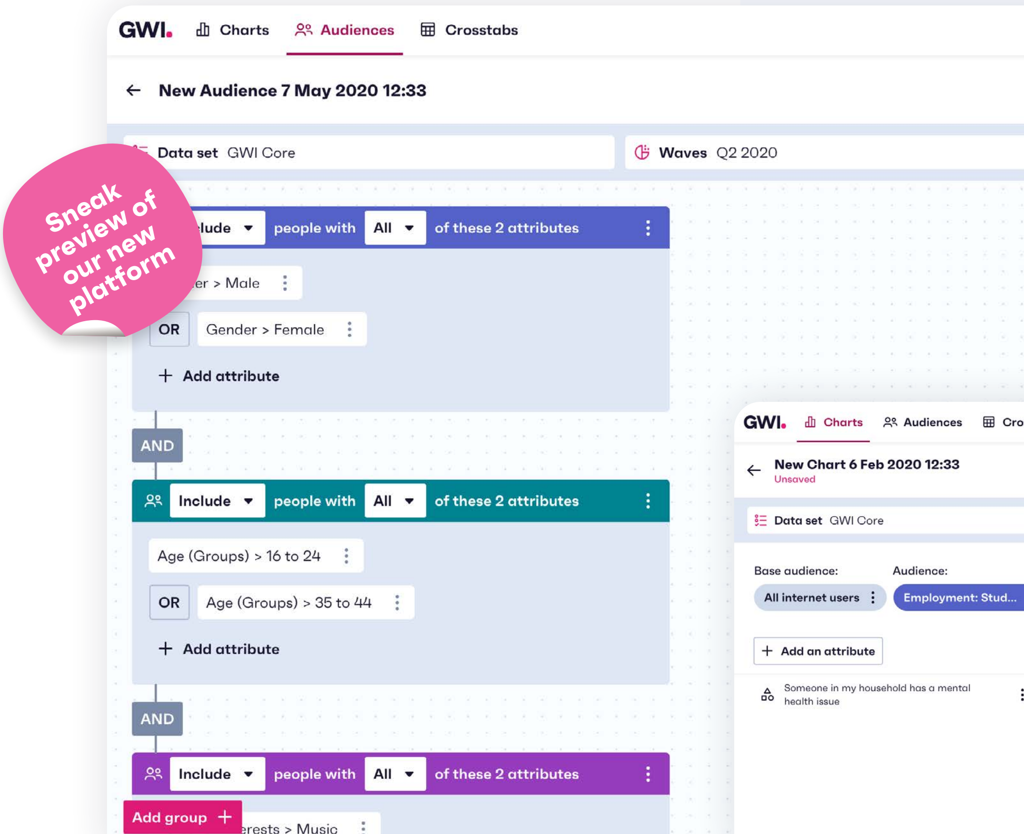
Each year, GWI interviews over 700,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet.

When reading this report, please note that we use a mixture of data from our ongoing quarterly global research, and insights from our Zeitgeist research and recontact studies, which are carried out in the U.S. and UK only.

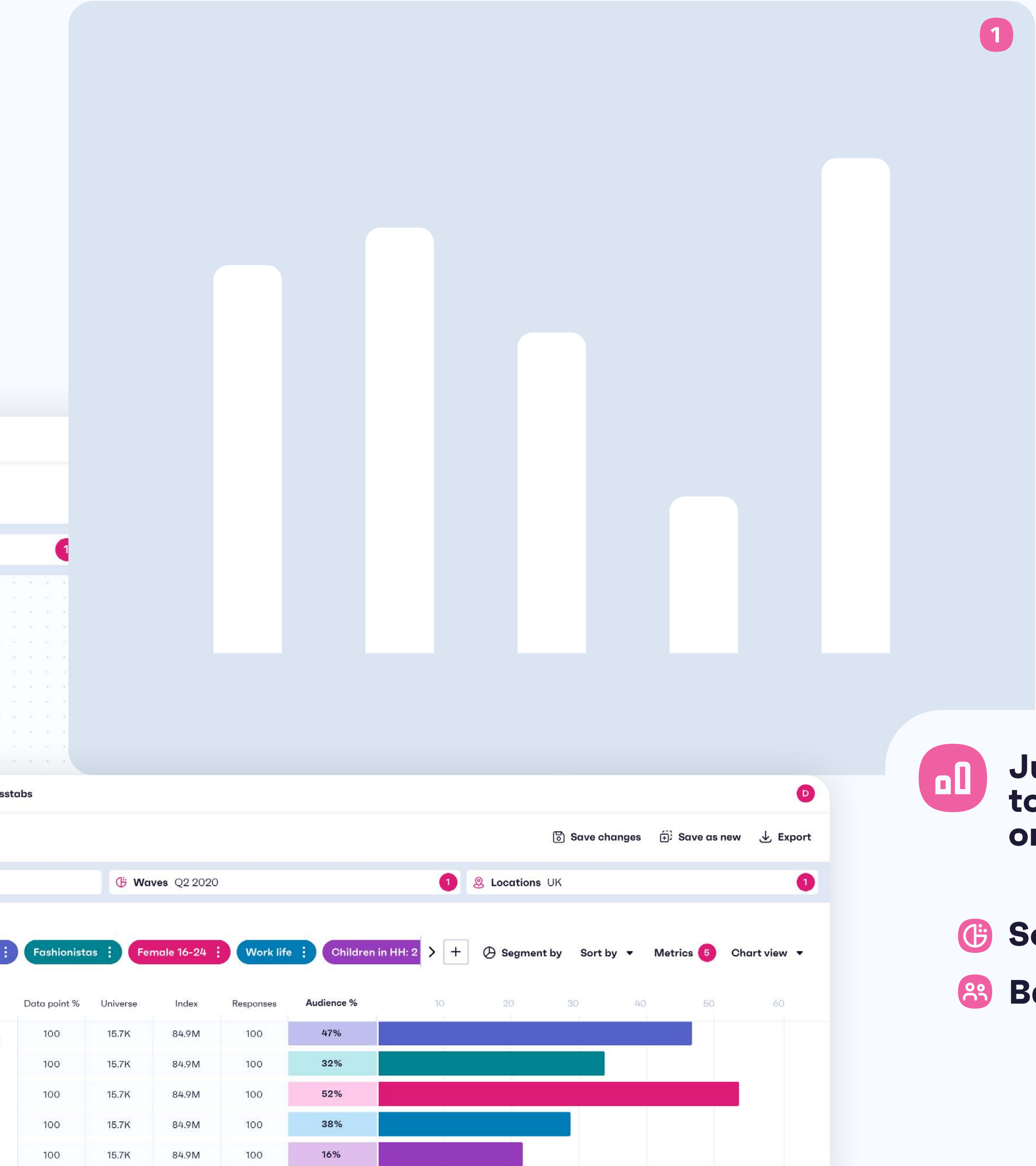
Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Discover the data on our **platform**

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.



Click the dots to navigate



Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report

Just click this icon to explore the data on the platform

Source

Base

Information about the source and base

Key insights

The gap between online and offline media is widening.

Before COVID, they were neck-and-neck in terms of how much attention they command during the day, but now online media is inching ahead of offline. Initial lockdowns saw spikes for all behaviors, but since then the story is one of online media pulling ahead.

Media has been affected by changed movement patterns – but not how you might expect.

Outdoor advertising and print media consumption have declined as commutes have been suspended, but podcasts have thrived. And more time spent at home has allowed smart speakers to consolidate their place as a new kind of media hub.

TV ad effectiveness is falling, but perceptions remain positive.

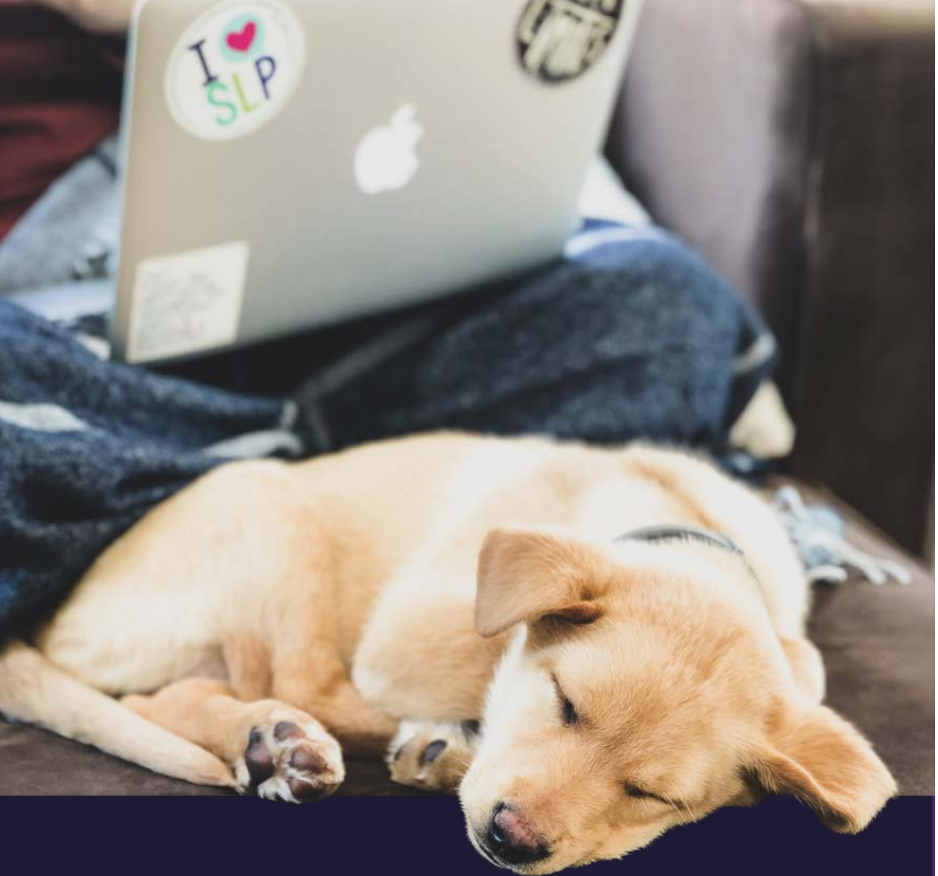
Though TV ads remain the most effective media channel for consumers to discover new brands, 2020 hints at change down the line; ads seen on social media overtook ads seen on TV among 16-24s for the first time. For the time being, perception of TV ads tends to be more positive; internet users typically describe them as entertaining or informative, while ads on social media are generally considered more invasive.

More people are reading news, and with more scrutiny.

Since the early days of the pandemic, consumers have been turning to news with more regularity. Online press has seen particularly good growth for time spent, and reading the news is now the third most important reason people use social media. While this is creating more opportunities for advertisers, general perceptions of trust have dipped slightly since the pandemic began.

Gaming now complements other forms of media.

While gaming became more prominent in 2020, gaming devices have opened up other media opportunities too; time spent on games consoles is now divided up into gaming or watching TV. At the same time, esports is now a popular activity among younger audiences.



01

Media consumption overview

The pandemic has given PCs/laptops renewed importance

As smartphones continue to be near-universal among the online population, PC/laptops, in decline prior to 2020, have became more important amid an increased reliance on working from home tools during the pandemic. Preliminary data from Q1 2021 suggests, however, that this decline is set to continue again.

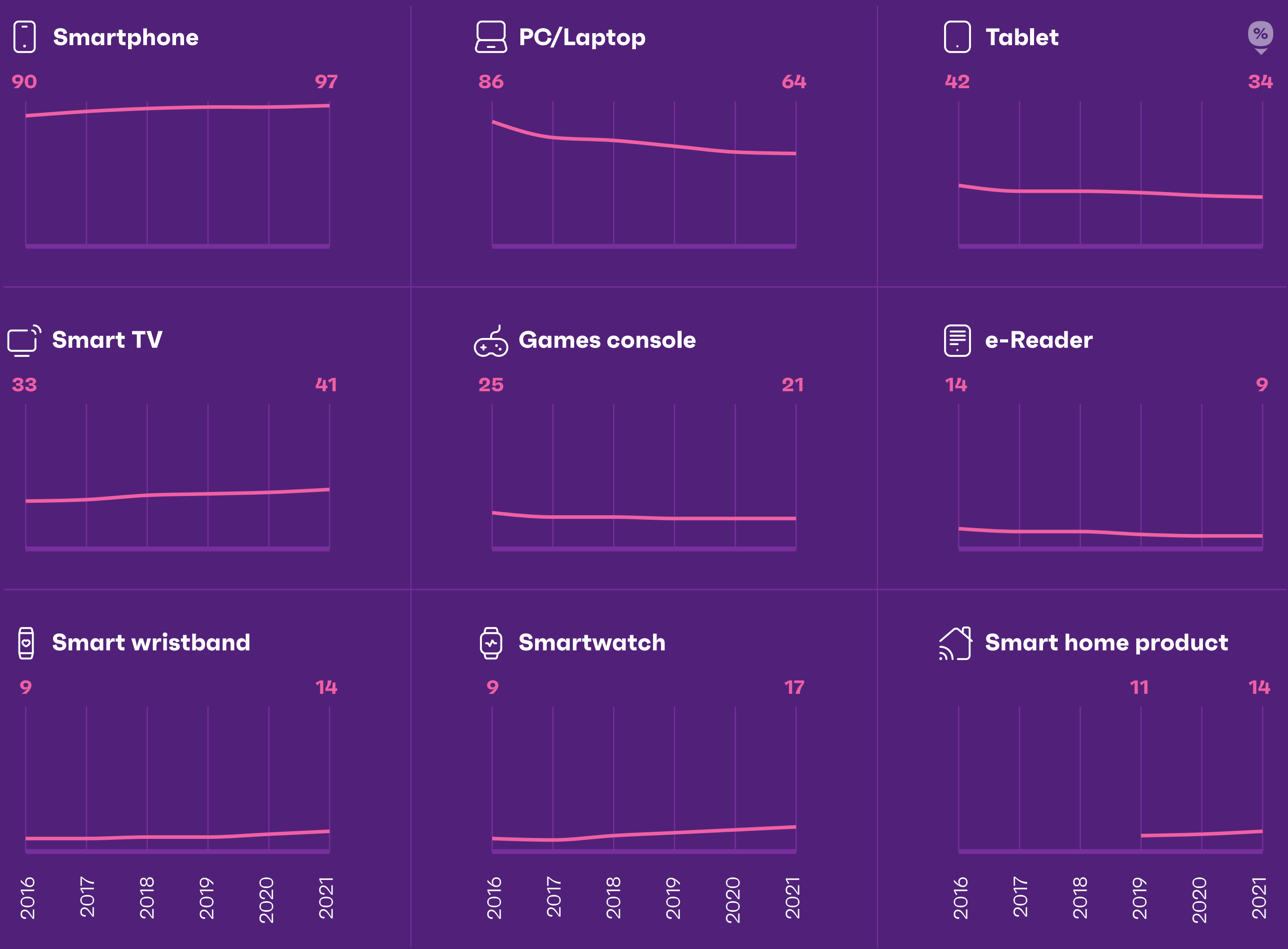
Similarly, games consoles, also tapering off ahead of the pandemic, likely owe their slight climb in H1 2020 to a surge in gaming throughout the year – around 27% of internet users play games on them as of 2020.

2020 saw a dramatic increase in smart product ownership worldwide, a side-effect of increasing time spent at home, while a surge in exercise behaviors, or use of health-tracking tools, benefited the likes of smart wristbands/watches.

Device ownership

% of internet users who own the following devices

1



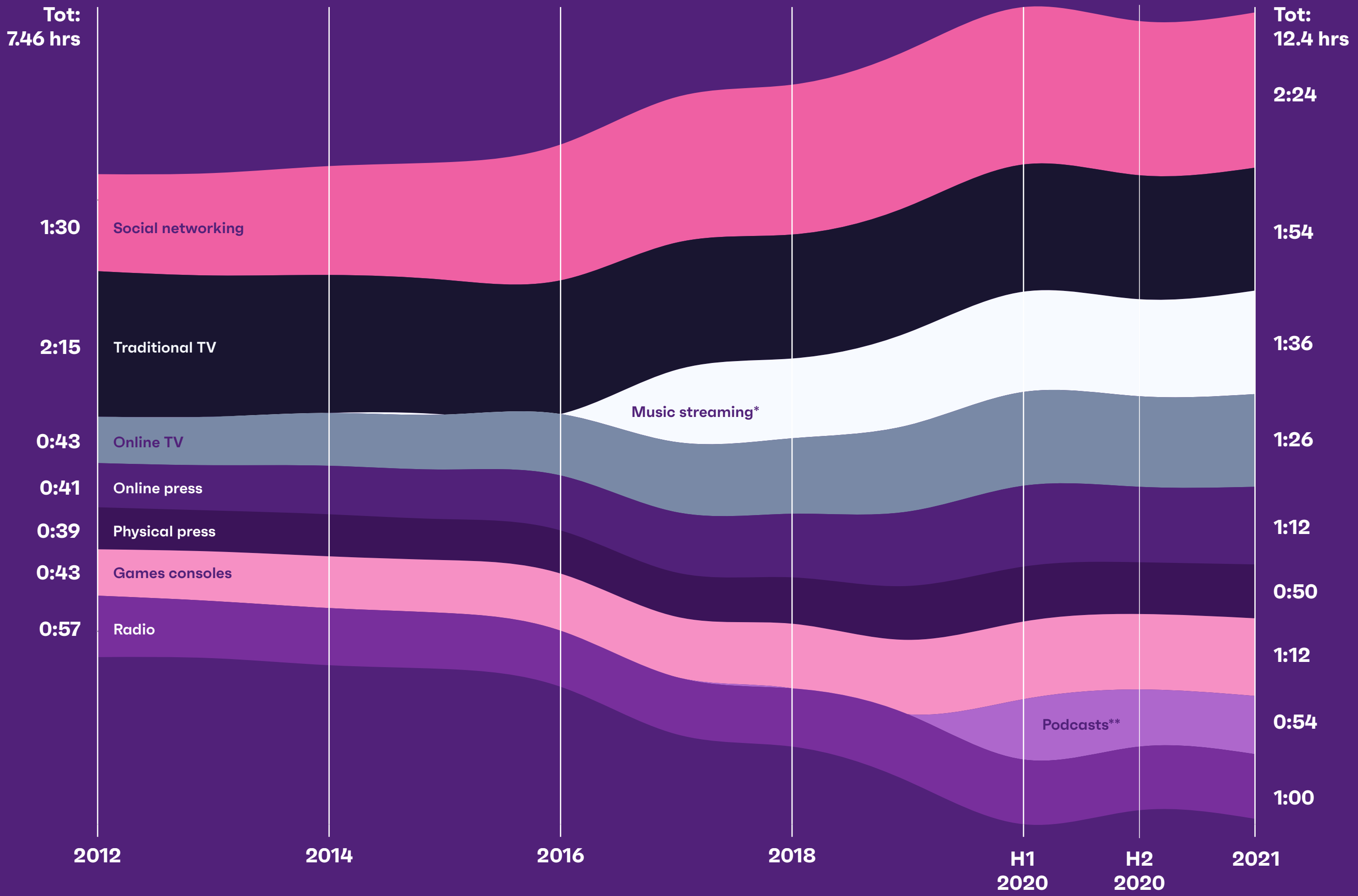
GWI Core Q1 2016 - Q4 2020 (averages of all waves conducted each year)

211,023 (2016) • 370,051 (2017) • 474,573 (2018) • 598,185 (2019) • 714,817 (2020) • 181,067 (2021) internet users aged 16-64

The evolution of media

Average time spent each day on the following (h:mm)

2



*added in 2017 **added in 2020

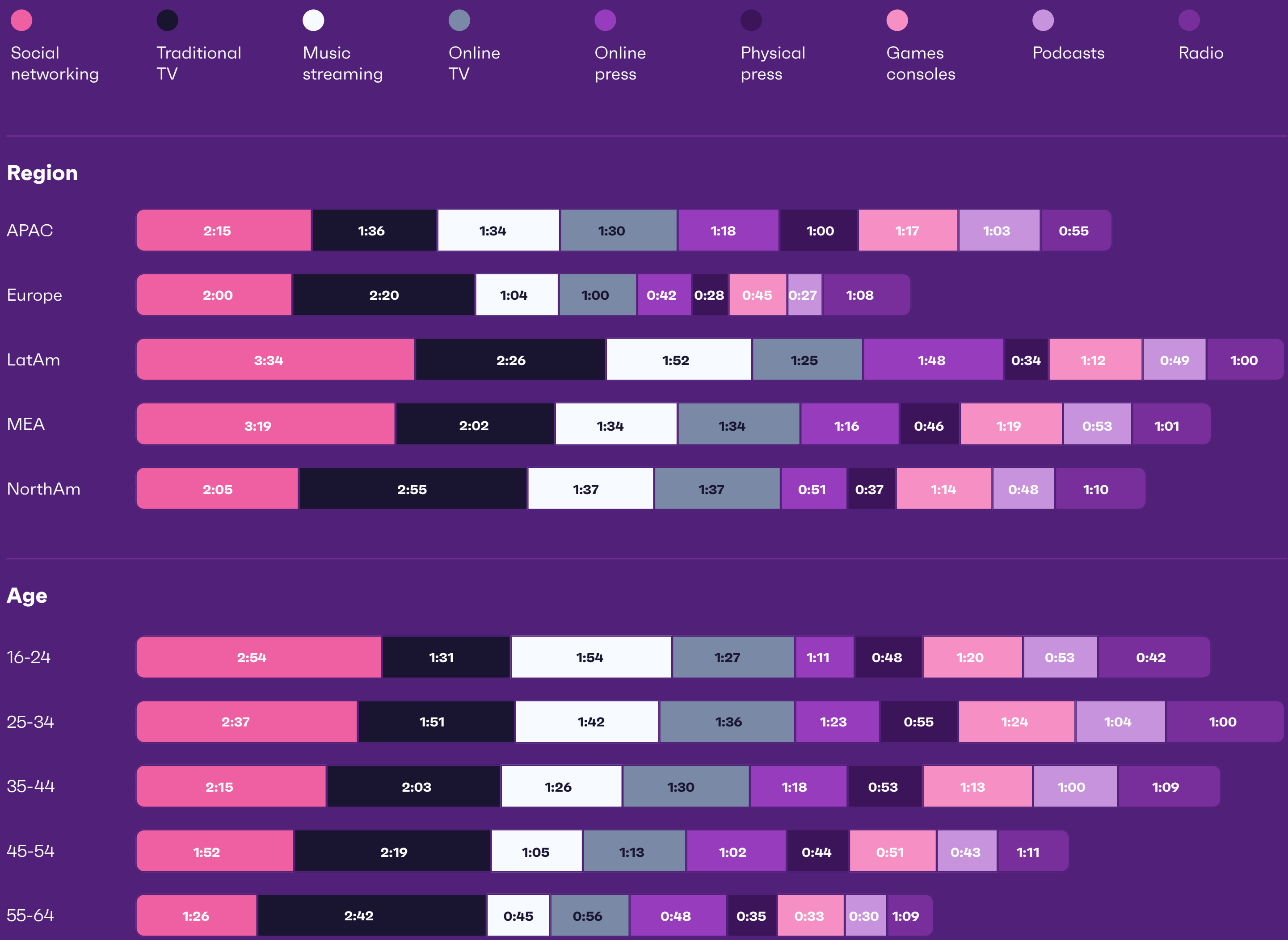
GWI Core Q1 2016 - Q4 2020 (averages of all waves conducted each year)

2,469,344 internet users aged 16-64

Media habits across demographics

Average time spent each day on the following (h:mm)

3



GWI Core Q1 - Q4 2020 | 516,365 internet users aged 16-64

Time spent on mobile overtook PCs in 2019

Crossing the mobile tipping point

A significant media milestone was reached in 2019, and it's been consolidated by the pandemic in 2020. Having trailed by over an hour as recently as 2016, the average internet user now spends 19 minutes more per day on mobile than PC.

16-24s reached this "mobile tipping point" in 2017, with 25-34s joining them a year later. In 2020, 35-44s became the latest age group to become mobile-first, in terms of average time spent per day. While 55-64s are still very much PC-first, they saw the biggest proportional jump in time spent on mobile during 2020.

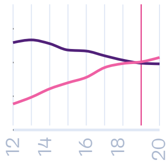
After years of decline, some demographics saw a jump in time spent on PC during 2020. But we expect this to be a short-lived increase, mostly driven by requirements specific to lockdowns. The fact it was most pronounced among 16-24s and students indicates that remote learning was a primary driver.

PC vs. Mobile

Average time spent each day on the following (h:mm)

Overall

4:19 3:16
1:17 3:35



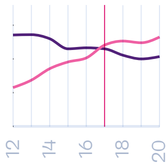
PC/Laptop/Tablet

Mobile

Tipping point

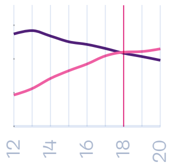
16-24

4:31 3:27
1:55 4:25



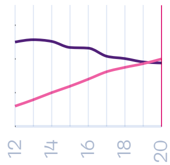
25-34

4:34 3:16
1:33 3:50



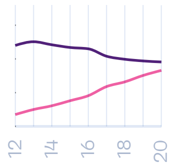
35-44

4:10 3:08
1:00 3:20



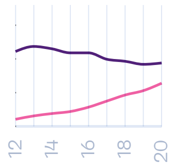
45-54

4:00 3:11
0:35 2:46



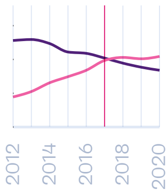
55-64

3:42 3:08
0:21 2:08



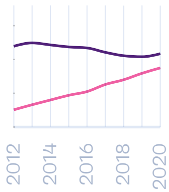
APAC

4:16 2:48
1:29 3:29



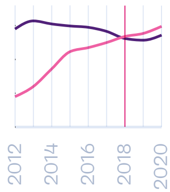
Europe

3:59 3:37
0:51 2:55



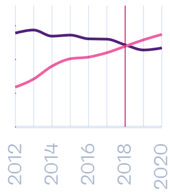
LatAm

4:50 4:32
1:30 4:58



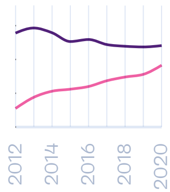
MEA

4:38 3:54
1:58 4:34



NorthAm

4:38 4:01
0:55 3:03



GWI Core Q4 2012 - Q4 2020 (averages of all waves conducted each year)

2,469,344 internet users aged 16-64

The pandemic has boosted online media

One of the best ways to understand how the pandemic has moved people online is through the lens of our media consumption segmentation.

With it, we can profile anyone who spends an average of more than 4 hours a day on at least one form of offline media as a "heavy" user, and vice versa for online media. "High" users are classed as those who spend 2-4 hours on at least one.

The chart on the right shows two meaningful trends. First, the percentage who are heavy users of either online or offline media has tilted in favor of the former. Having been roughly equal in 2019, the gap is now widening.

You can also notice the bump for all types of media in Q2 2020, a time when **half the global population** was under some kind of lockdown restrictions. While the peak in sheer time spent died down in subsequent waves, the balance has shifted in online media's favor.

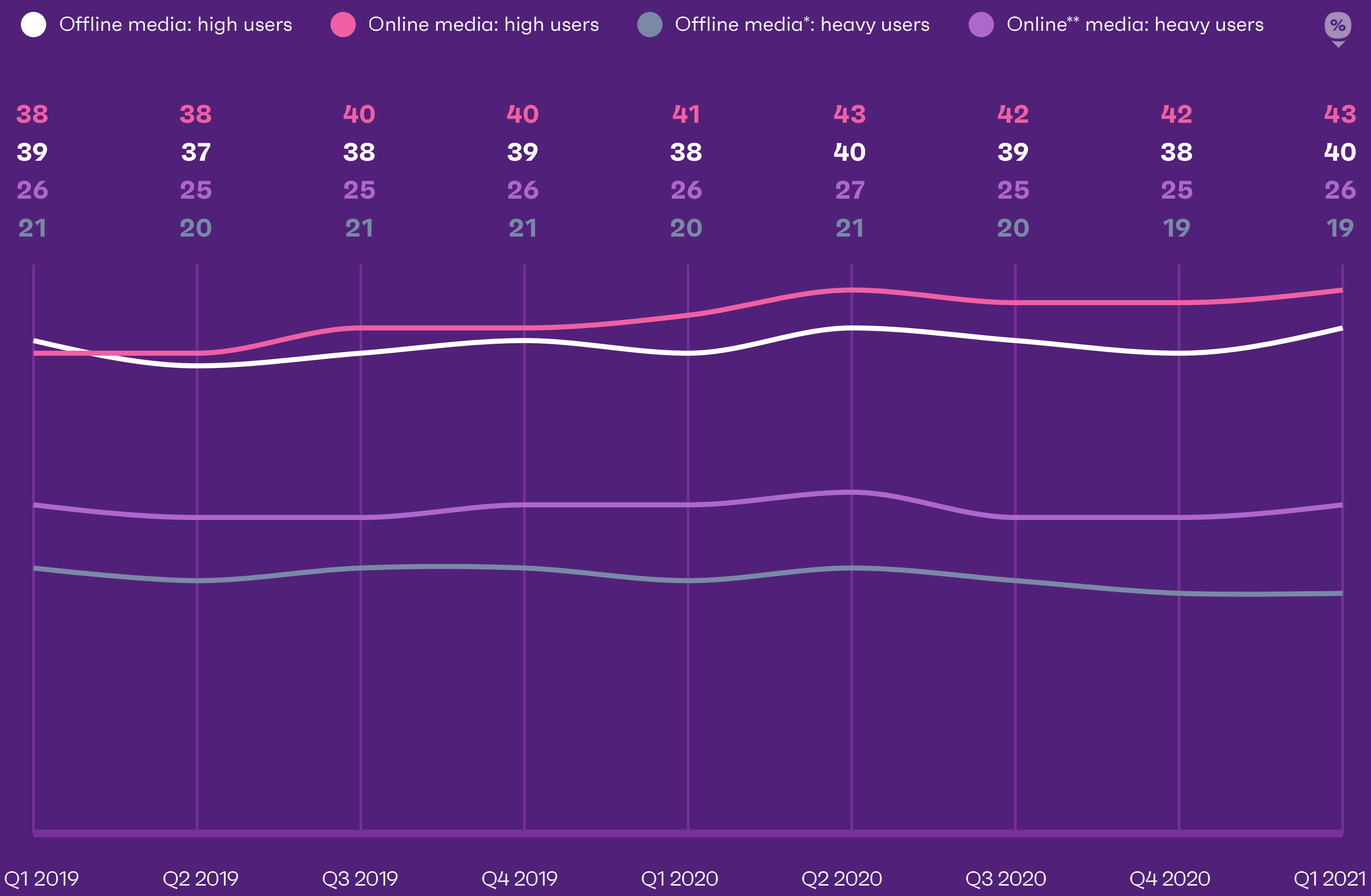
The pandemic edged online media ahead of offline

5

Online vs. Offline

% who are...

High users: 2-4 hours a day **Heavy users**: 4+ hours a day



*Games consoles/broadcast TV/physical press/radio **Music streaming/online press/online TV/podcasts/social media

GWI Core Q1 2019 - Q1 2021 1,494,069 internet users aged 16-64

Considering reach against attention

We can get further insights into media effectiveness by plotting average time spent per day against its maximum reach. Games consoles, for example, command a lower reach but take up over an hour of the average user's time per day. Likewise, while there is a cluster of media channels that reach around 7 in 10 internet users, music streaming commands the most time per day of them on average.

Games consoles have reduced reach, but attract more time per day

Reach vs. time spent

Average time spent per day on the following media in h:mm vs. % who use them

GWI Core Q1 - Q4 2020 516,365 internet users aged 16-64

Gaming and smart speakers benefited where cinema and the commute lost out

COVID-19 impact

By crunching the thousands of data points in our Core dataset, we can sift through and highlight which media attitudes and behaviors have been most affected by the pandemic, whether it's to do with personal interest, consumption levels, or ad effectiveness.

Few will be surprised that use of public transport and visits to the cinema have seen the biggest relative falls (along with effectiveness of those ad channels), as they were largely outlawed in many countries around the world.

Disruption to the commute has also had an impact on other channels, with radio ads becoming less impactful and time spent reading physical press declining.

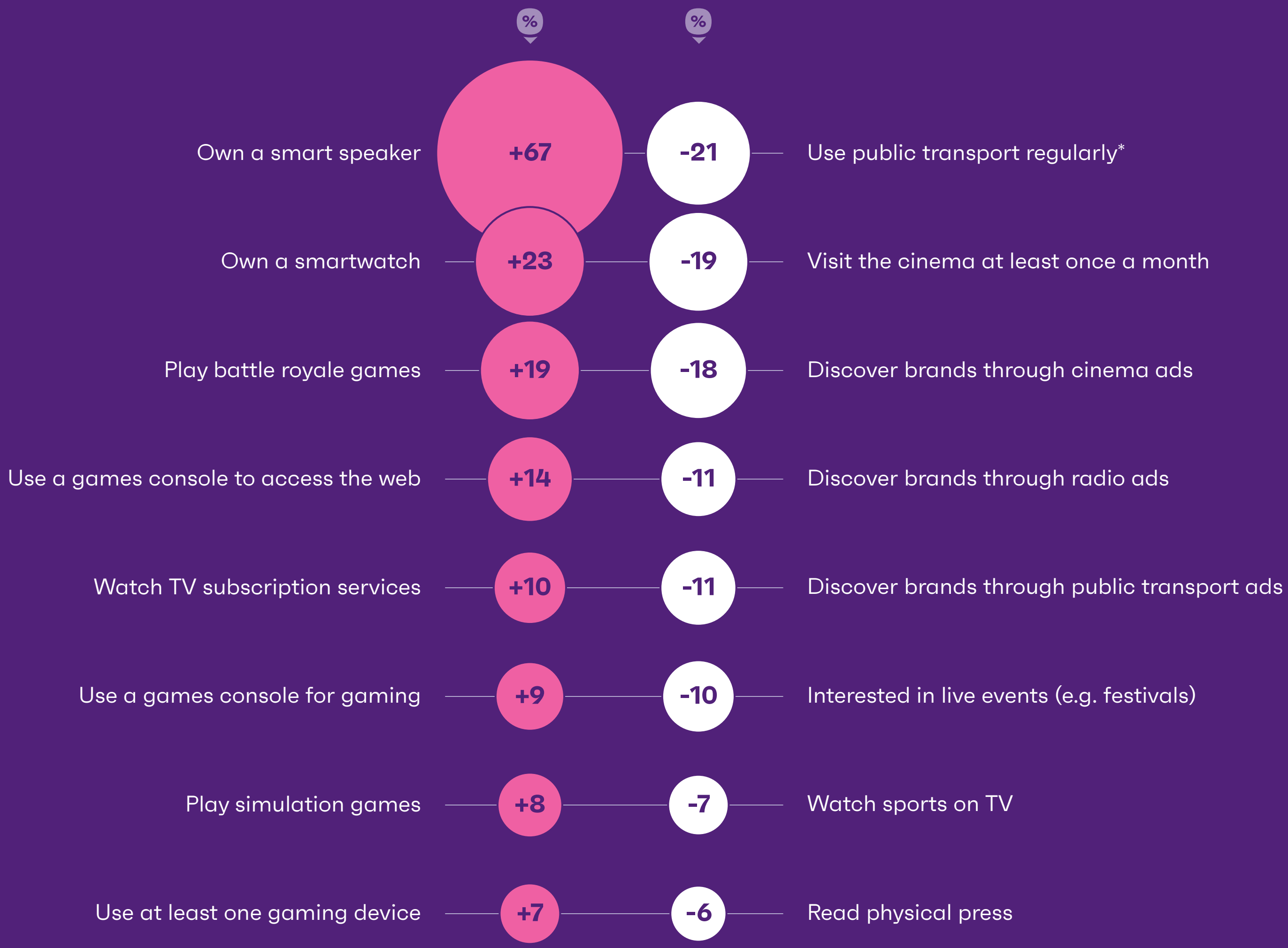
Of the media that has seen increases, gaming is the closest thing to a "winner" of the pandemic. Not only is use of gaming media up, it's also become more embedded as a hub for other online activities (like watching TV), and it's sown the seeds for alternative kinds of social media, such as the persistent gaming universes of battle royale games (e.g. *Fortnite*).

Ownership of smart speakers and smartwatches have both increased sharply. For the former, increased time spent at home has made their convenience more appealing and reduced some anxieties about having smart tech in the home. Smartwatches, meanwhile, have likely benefited from the increased amount of at-home exercise. Both devices could well emerge more in the next few years as media hubs in their own right.

The COVID-19 Impact: Biggest media increases/decreases

7

% change between Q4 19-Q4 20 in the following data points



*more than once a week

GWI Core Q4 2019 - Q4 2020 354,711 internet users aged 16-64 • 266,775 internet users aged 16-64

02

TV/Video

Broadcast TV remains firmly ahead of streaming

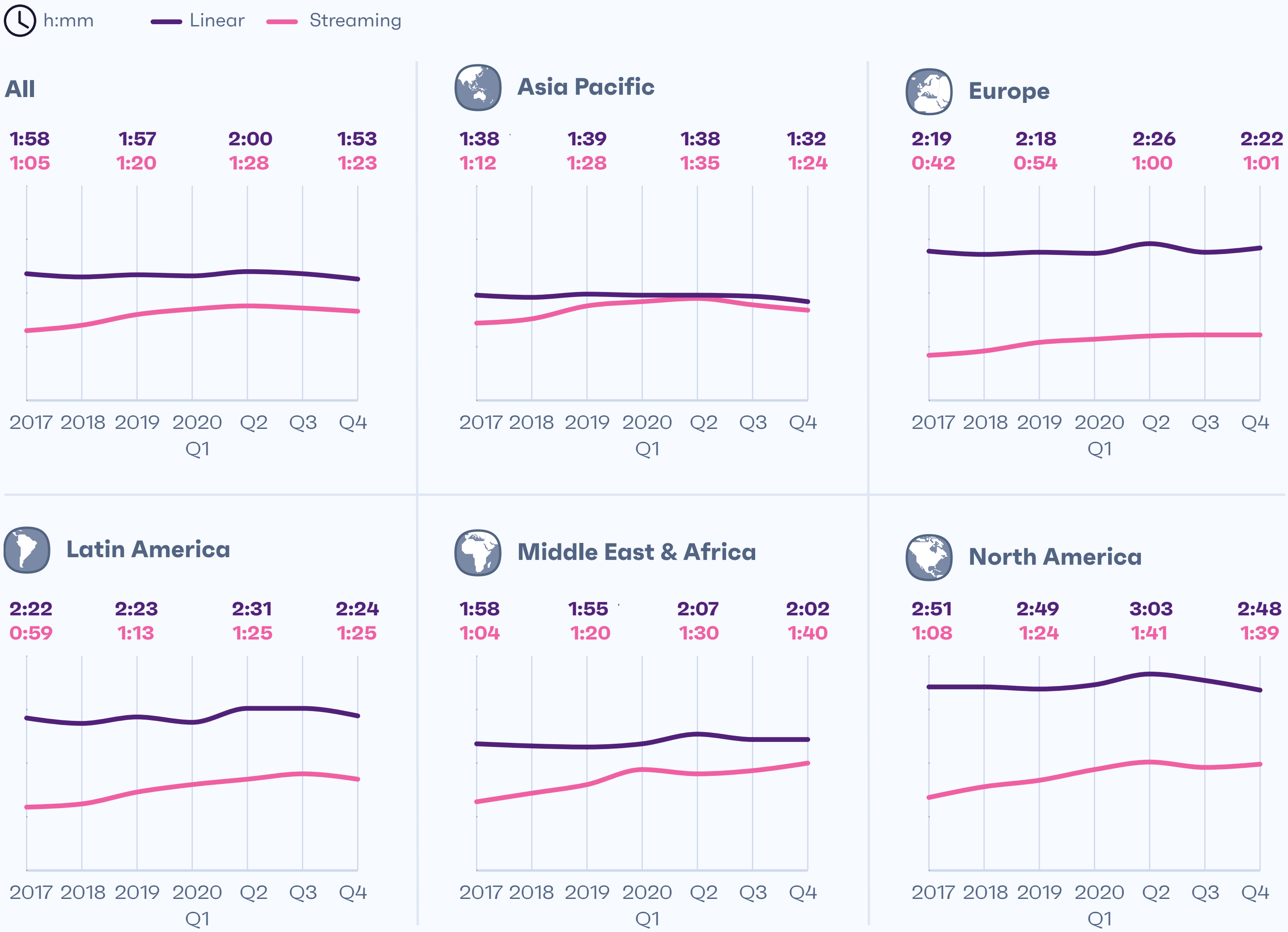
While broadcast TV remains the firm favorite worldwide, daily time spent on it has declined by 5 minutes since 2017. This was briefly interrupted in Q2 2020, when the effects of the pandemic took hold, but the resulting decline in Q3 onwards has seen it revert to normal levels.

The situation is similar for streaming; daily time spent has climbed 18 minutes since 2017, but has declined from the Q2 2020 peak. There are notable exceptions, particularly among internet users in MEA, where daily time spent actually grew by 10 minutes. Elsewhere, streaming shows resilience in Europe and LatAm, while reverting in APAC.

Broadcast TV viewers are more likely than online TV viewers to watch for more than 2 hours per day

Streaming vs linear

Average time spent each day on the following (h:mm)



GWI Core Q1 2017 - Q4 2020 (averages of all waves conducted each year)

303,502 (2017) • 391,130 (2018) • 493,256 (2019) • 516,365 (2020) internet users aged 16-64

Watching TV on mobile grew even under stay-at-home orders

Big vs small screen

For the most part, TV sets are still the most-used device for TV watching. Other devices are starting to catch up, though, with watching any kind of TV, on a TV, having fallen four percentage points since 2018, while mobile has had a steady increase.

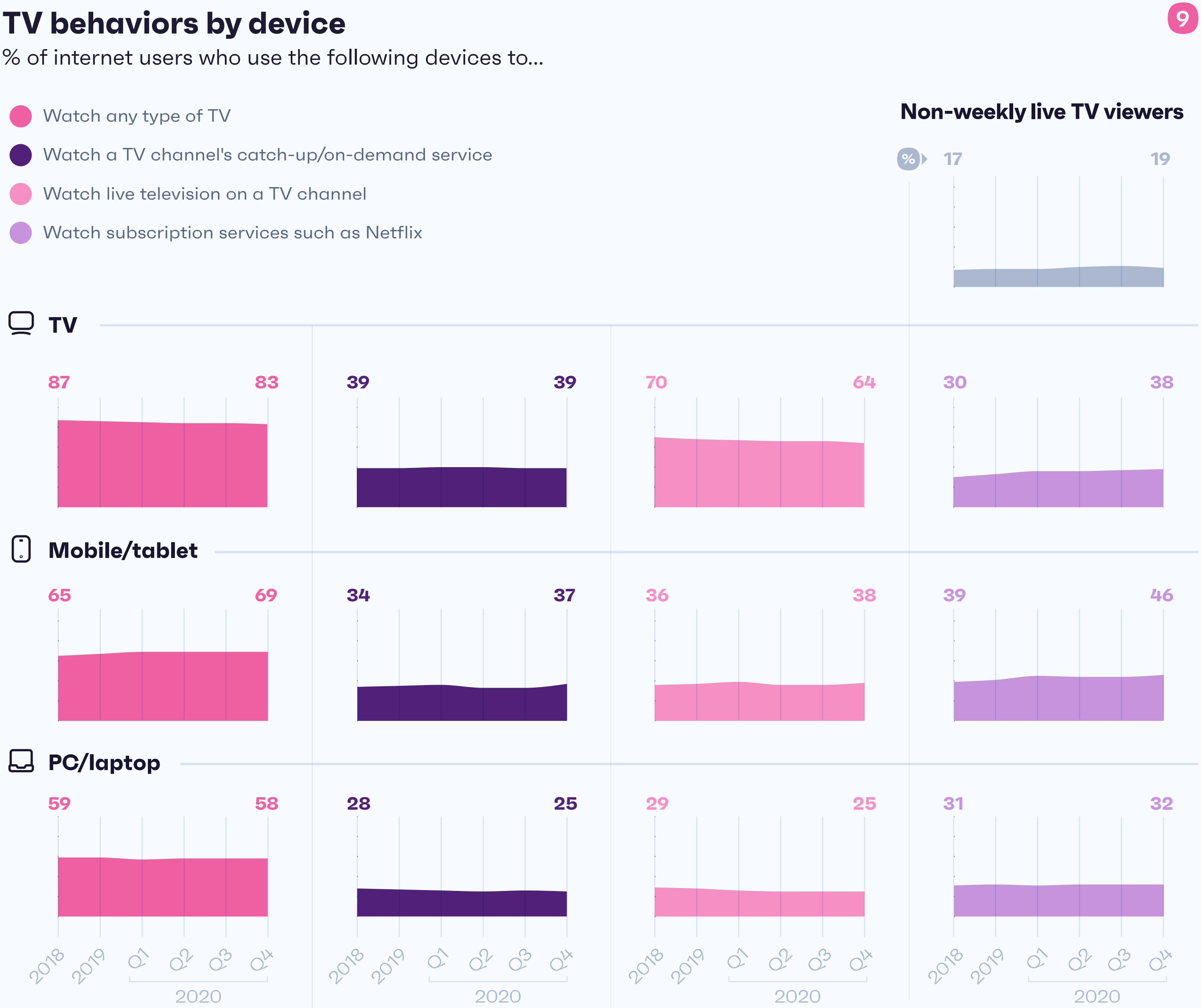
Mobiles/tablets continue to climb in regards to watching subscription services such as Netflix. Even at a time where many have been confined to their homes, these devices remain the firm favorite compared to TVs and PCs – a telling sign that convenience is still important in viewing behaviors.

Though subscription viewing has climbed slightly faster on TVs than smaller-screen devices over time, a return to working locations outside the home could potentially benefit mobiles/tablets for internet users on the commute.

The situation is far different on PC/laptops, however. Viewing behaviors, of any kind, have stayed flat since Q2 2020 with mobiles/tablets snapping up time spent on subscription services, live, and catch-up TV – the latter having climbed four-percentage points since Q3 2020.

TV behaviors by device

% of internet users who use the following devices to...



GWI Q4 2018 - Q4 2020 (averages of all waves conducted each year)

391,130 (2018) • 493,256 (2019) • 516,365 (2020) internet users aged 16-64

Services/genres

YouTube takes the ascendancy as the most popular place to watch online videos in all regions, with the exception of North America, where Netflix leads.

Disney+ has grown quickly to command a decent market share in English-speaking countries; it's now the 5th most-watched TV service in the U.S., and the 4th most-watched in New Zealand.

When it comes to the type of programming watched, news and current affairs is the most popular genre for all age groups bar the 16-24s. The pandemic likely played a role here – for all waves of our bespoke coronavirus research throughout spring/summer 2020, watching/reading more news was consistently the most common change in media behavior.

Sport and the arts have been similarly affected, but in reverse. With competitions and performances kept off the airwaves for months at a time, both have fallen in popularity since 2019 more than any other genre.

Netflix leads YouTube for video consumption in North America

Most popular video services

% who use the following services

Asia Pacific	YouTube 48	NETFLIX 27	iQIYI 27	YOUKU 18*	prime video 16**
Europe	YouTube 67	NETFLIX 47	prime video 22	Disney+ 10†	VK 9††
Latin Am.	YouTube 82	NETFLIX 80	prime video 40	Claro 17	Premium 16
MEA	YouTube 83	NETFLIX 47	شاهد 20	Premium 17	prime video 13
North Am.	NETFLIX 65	YouTube 53	prime video 41	hulu 35	Disney+ 31

GWI Core Q4 2020 | 124,758 internet users aged 16-64

* China and Hong Kong only
**Not China †Selected markets only ††Russia only

Most popular TV genres

11

% who watch the following in a typical week

Key

Entertainment/variety · Films/movies · News/current affairs · Comedy · Documentaries/factual · Reality · Science/nature · Sports

16–24

Genre	%
Entertainment/variety	59
Films/movies	57
News/current affairs	54
Comedy	51
Reality	44

25–34

Genre	%
News/current affairs	63
Entertainment/variety	59
Films/movies	59
Comedy	49
Sports	46

35–44

Genre	%
News/current affairs	67
Entertainment/variety	61
Films/movies	59
Comedy	46
Science/nature	46

45-55

Genre	%
News/current affairs	71
Films/movies	60
Entertainment/variety	59
Documentaries/factual	48
Sports	44

55–64

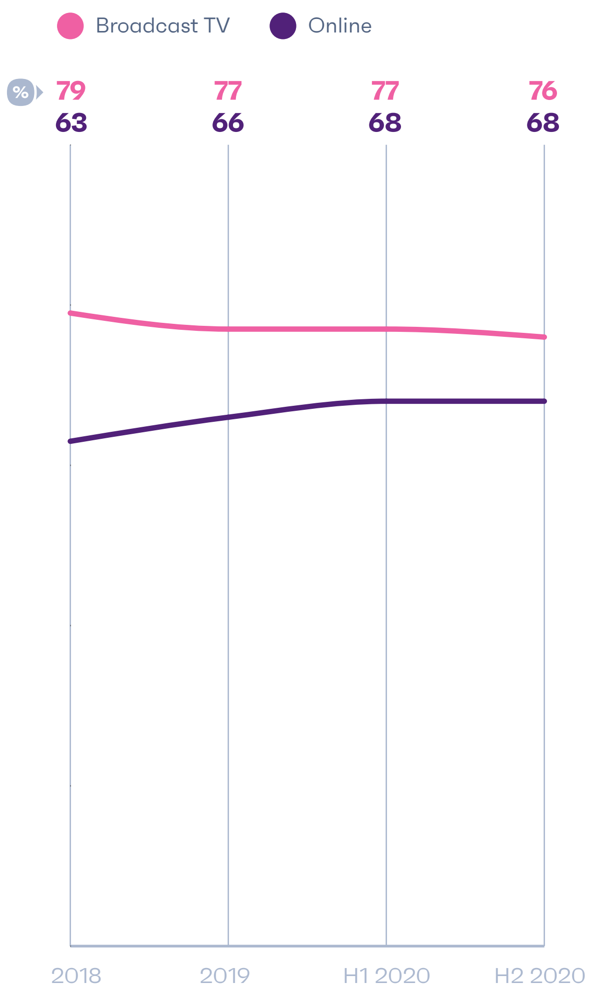
Genre	%
News/current affairs	75
Films/movies	60
Entertainment/variety	54
Documentaries/factual	49
Science/nature	43

GWI Core Q4 2020 · 124,758 internet users aged 16-64

Sports: Broadcast vs. Online

12

% who watch sports on...



GWI Core Q3 2018 - Q4 2020
(averages of all waves conducted each year)

391,130 (2018) • 493,256 (2019) •
516,365 (2020) internet users aged 16-64

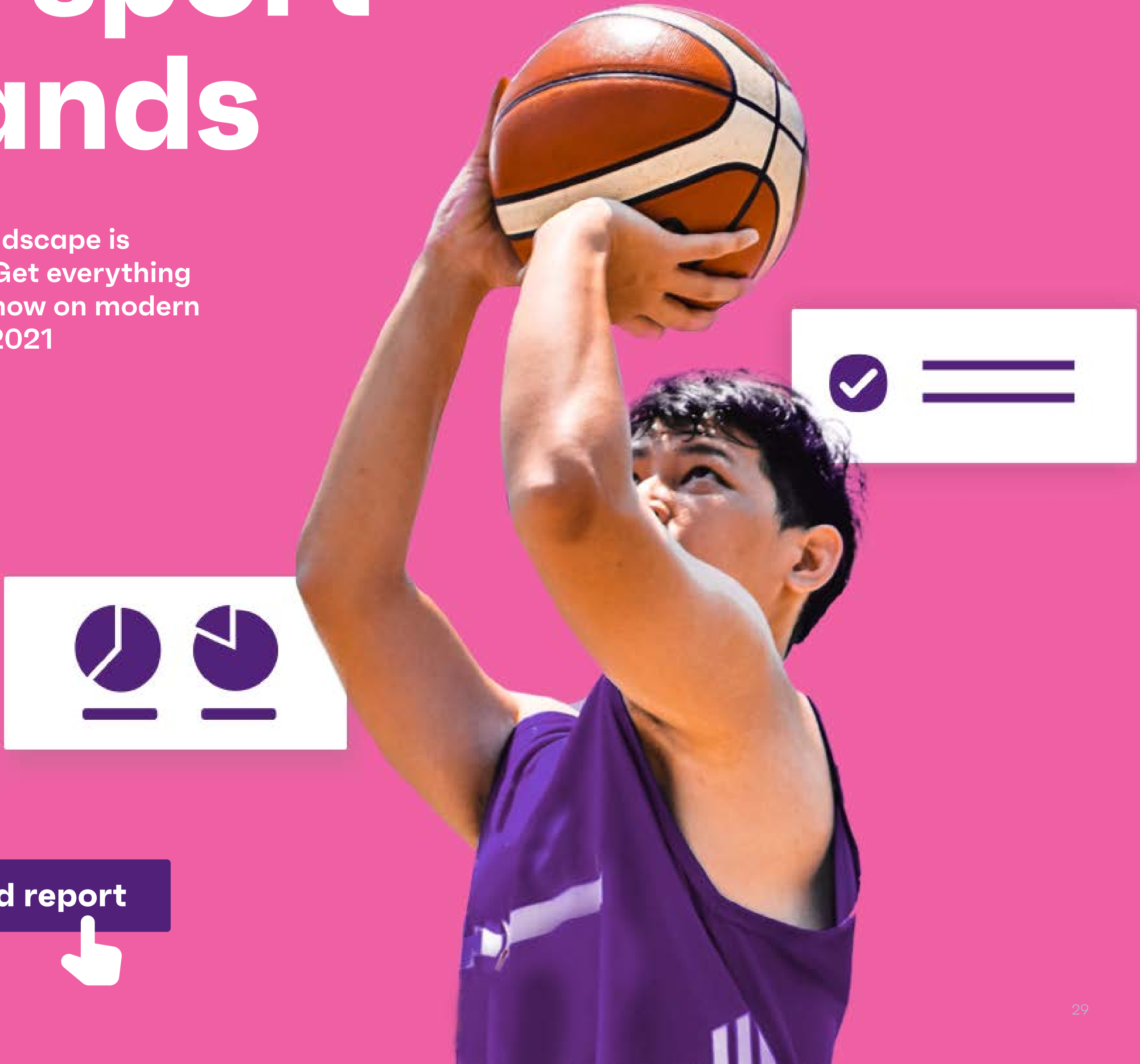
Sports

In the immediate aftermath of the pandemic, a widespread halt to sporting events contributed to a fall in viewing behaviors on broadcast TV – the growth of online suggesting fans opted for services covering ongoing leagues in foreign countries, while some made the **switch** to esports as an alternative.

While sports viewership on broadcast TV was already in decline ahead of 2020, recent data from our Zeitgeist studies hint at a potential revival for viewing of this type. In the UK and U.S. 60% of internet users, who are fans of the Summer Olympics, intend to watch the games on live TV.

Insights for sport brands

The sports landscape is shifting fast. Get everything you need to know on modern sport fans in 2021



Download report

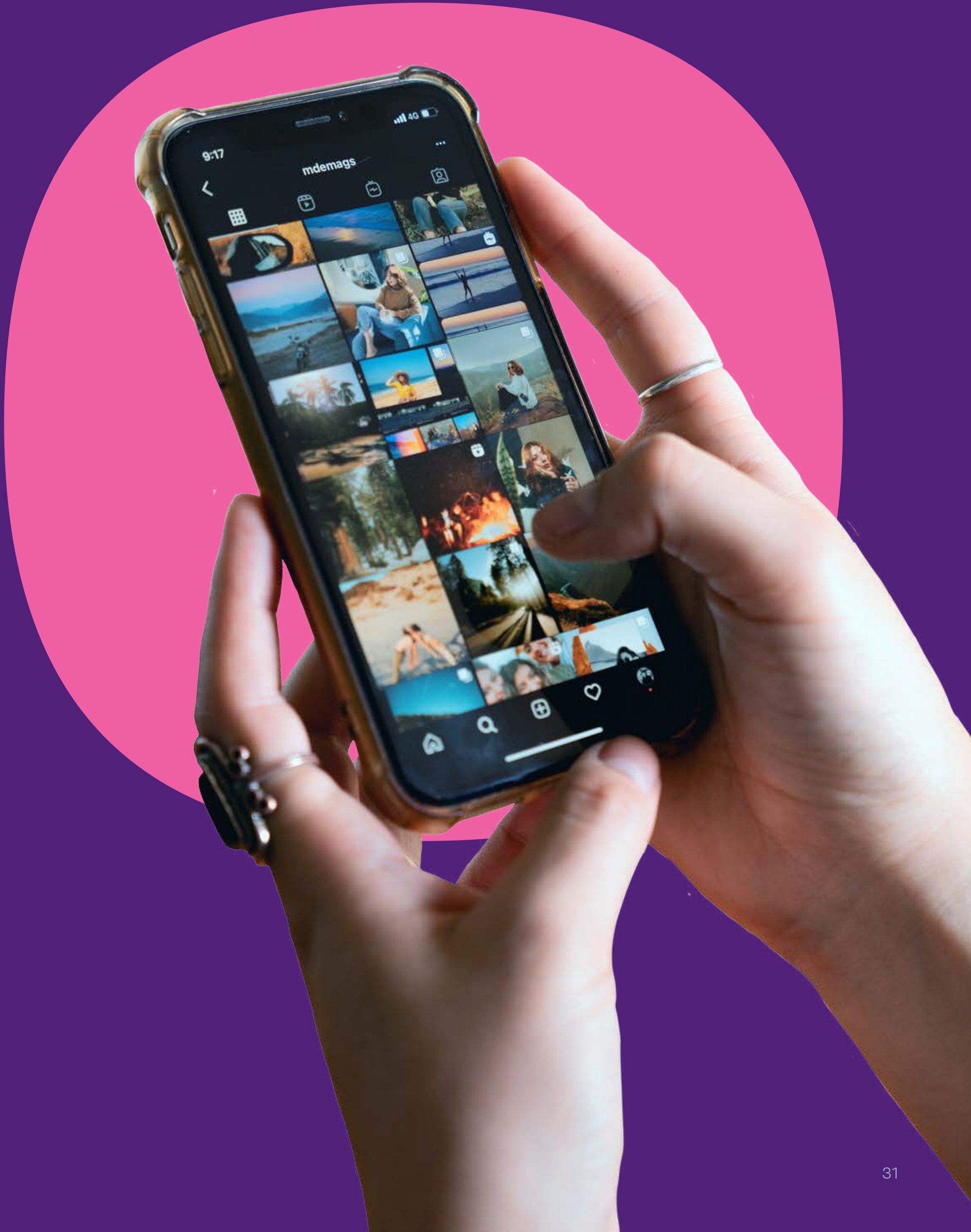
The role of content on social media

% of social media users who say the following are their main reasons for using social*

Age	Finding content	Seeing what's trending/what's being talked about	Reading news stories	Watching live streams	Watching/ following sports
16–24	38	35	35	27	23
25–34	34	31	37	27	23
35–44	30	29	38	25	22
45–54	26	25	39	20	19
55–64	22	21	36	16	15

GWI Core Q4 2020 Base: 176,424 social media users aged 16-64

*concerning media-related actions only

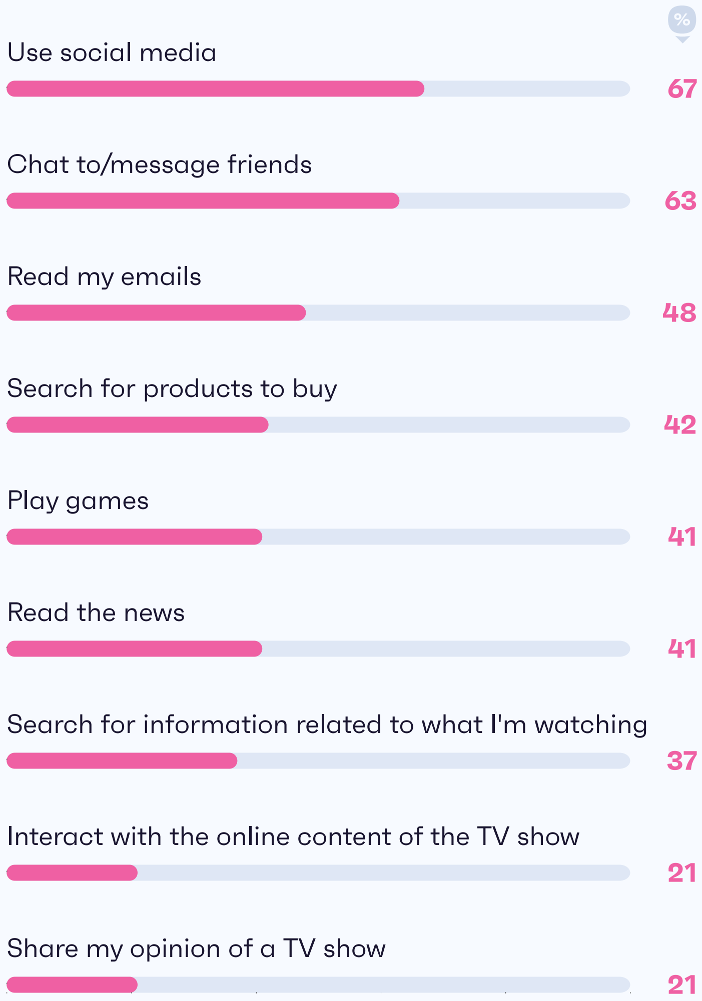

9:17
mdemags

Viewers of educational (34%), cultural (31%) and children's TV (30%) are most likely to interact with the online content of a TV show

Second-screening: activities

14

% of second-screeners who do the following online when watching TV

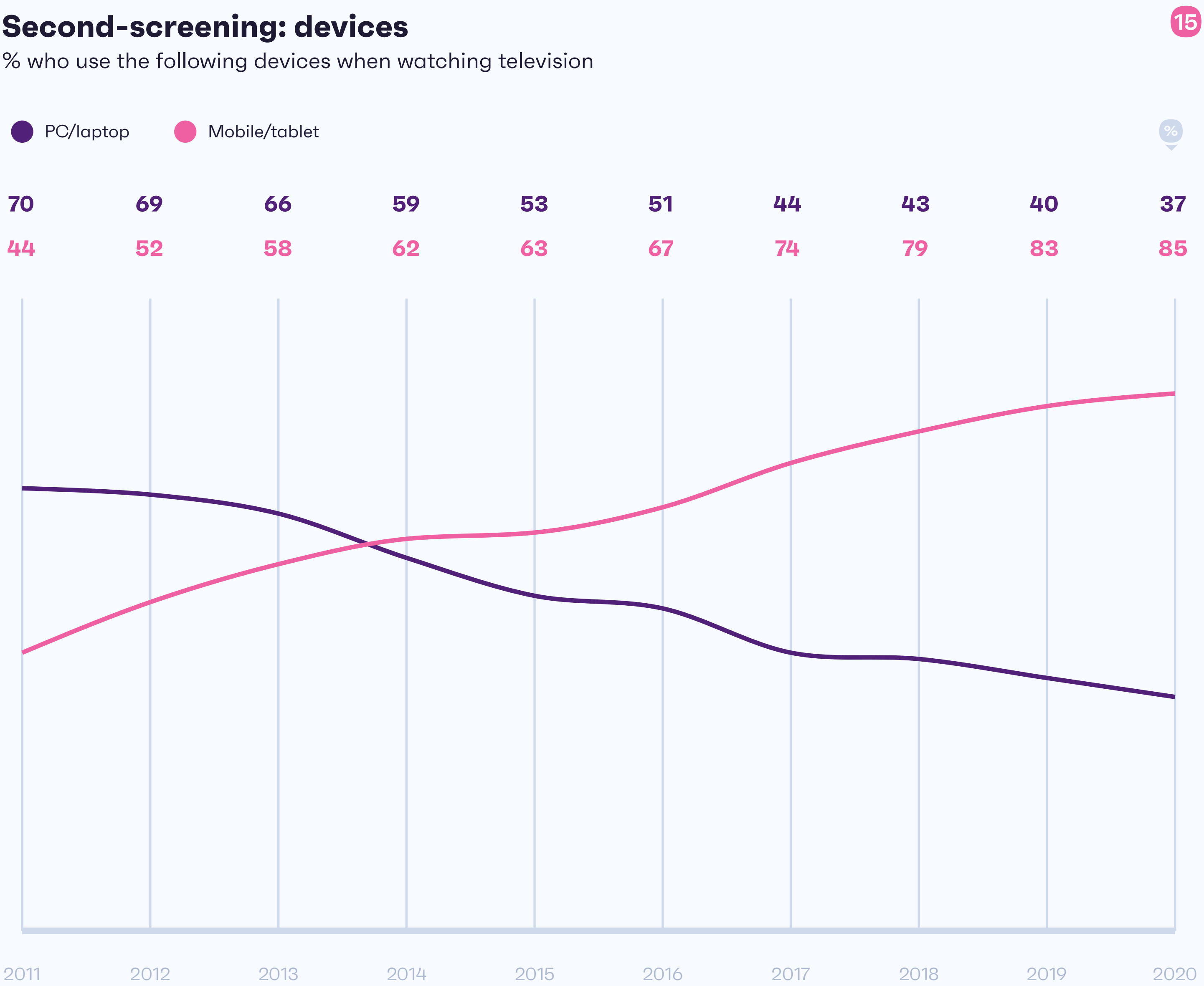


GWI Core Q4 2020

111,327 second-screeners aged 16-64

Second-screening: devices

% who use the following devices when watching television



GWI Core Q2 2011 - Q4 2020

3,003,638 internet users aged 16-64

03

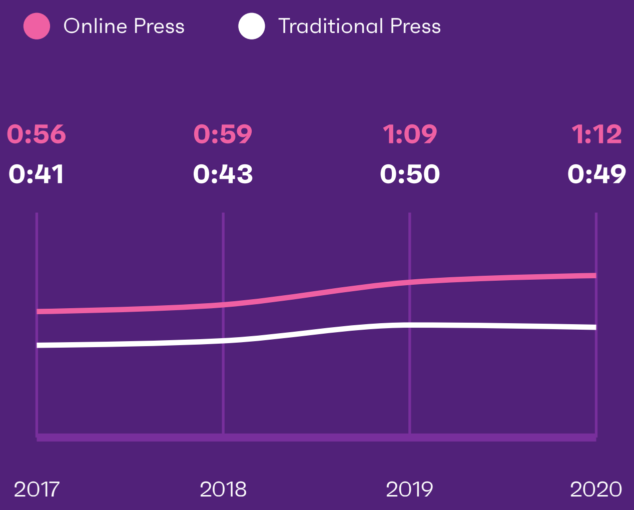
News consumption

Where consumers get their news

Online vs. offline press

16

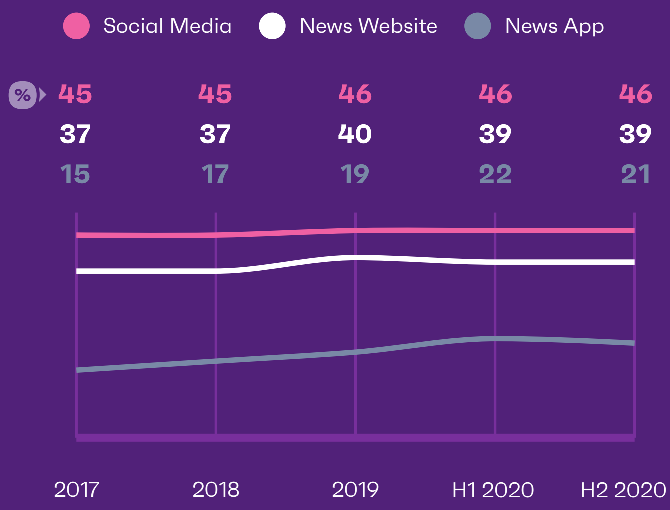
Daily time spent in h:mm



Social vs. site

17

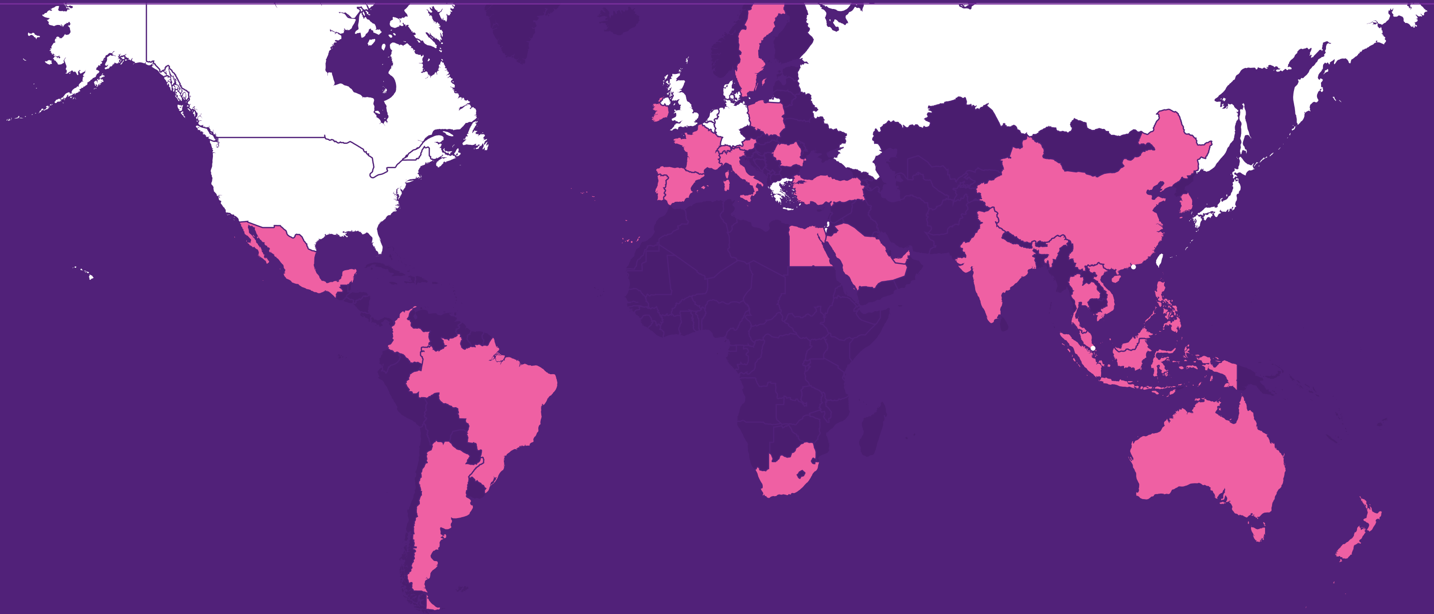
of internet users who get their news from...



GWI Core Q1 2017 - Q4 2020 (averages of all waves conducted each year)

303,502 (2017) • 391,130 (2018) • 493,256 (2019) • 516,365 (2020) internet users aged 16-64

Countries where news services are more often viewed ... on social media / on news websites



On social media:

Argentina
Australia
Austria
Brazil
China
Colombia
Egypt
France
India
Indonesia
Ireland
Italy
Malaysia
Mexico
New Zealand
Philippines
Poland
Portugal
Romania
Saudi Arabia
South Africa
South Korea
Spain
Sweden
Switzerland
Thailand
Turkey
UAE
Vietnam

On news websites:

Belgium
Canada
Denmark
Germany
Greece
Hong Kong
Israel
Japan
Netherlands
Russia
Singapore
Taiwan
UK
USA

33 of our 47 tracked markets typically see news sources on social media more than news websites

Global trust in news has remained unchanged since 2017, declining only slightly in the aftermath of the pandemic

News by source

The daily time spent reading online press surpasses that spent on print by 23 minutes. It's a gap that's been widening year-on-year since we began tracking both forms of media in 2012.

But in the last year, time spent reading press of any kind has increased; digitized media has become more accessible and, in some cases, more **financially viable.** Data from wave 1 of our bespoke COVID-19 research, fielded in March 2020, revealed 66% of internet users were watching more news coverage, while 15% were reading more news in general – a clear sign of the pandemic's impact on news consumption.

Though readers of news apps, such as Flipboard, typically spend the most time on online press, those doing so via social media are quickly catching up. In 2017, news app users spent 18 minutes longer a day on online press, falling to just 6 minutes in 2020.

Globally, 46% of internet users say they view news sources on social media, compared to 40% on websites. There are some exceptions, most notably by age; baby boomers still prefer to use sites, while Gen Xers engage with the two equally – Gen Zs and millennials, however, remain social-first.

Trust in news

"Fake news" is often touted as a key issue when it comes to social media, particularly in the aftermath of the COVID-19 pandemic. Reading the news on social media is now the third most important reason internet users say they use social media (36% do).

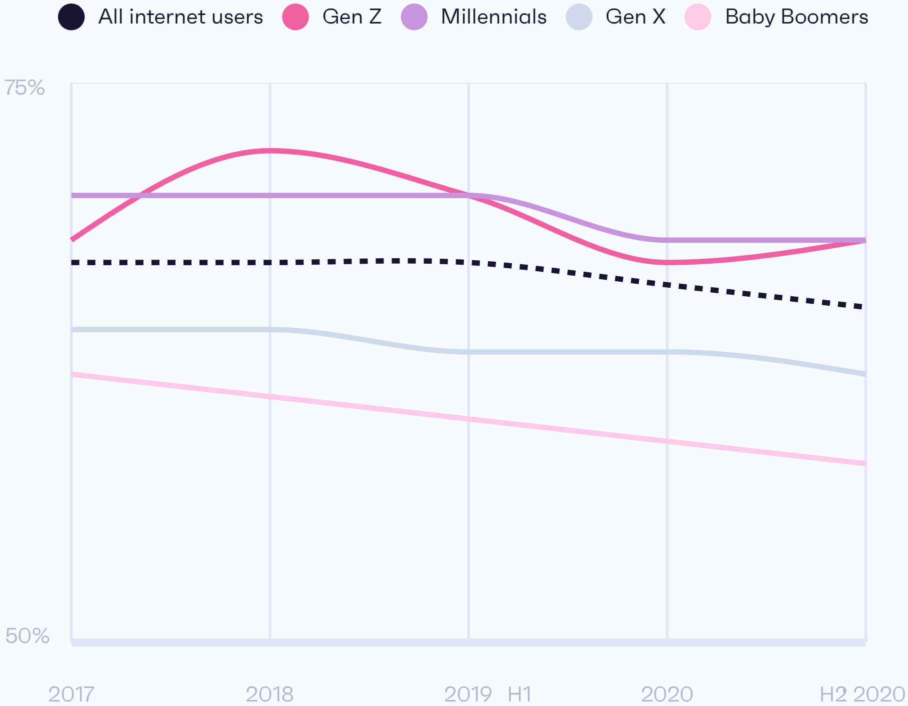
Internet users who see our tracked publishers on social media are the least likely to say they're trustworthy or accurate (85% say this), compared to when they view them on websites (88%) or news apps (92%). Trust in news can be very contextual; a **report** from the Reuters Institute showed attitudes towards news that readers saw on social media often depended on how strongly they felt towards the news brands they encountered there. Convenience was a winning factor, but the act of finding news here was often secondary to why they mainly used these platforms in the first place.

News trust

news brands are trustworthy and accurate*

*based on a list of named news services

% who agree with the above statement:



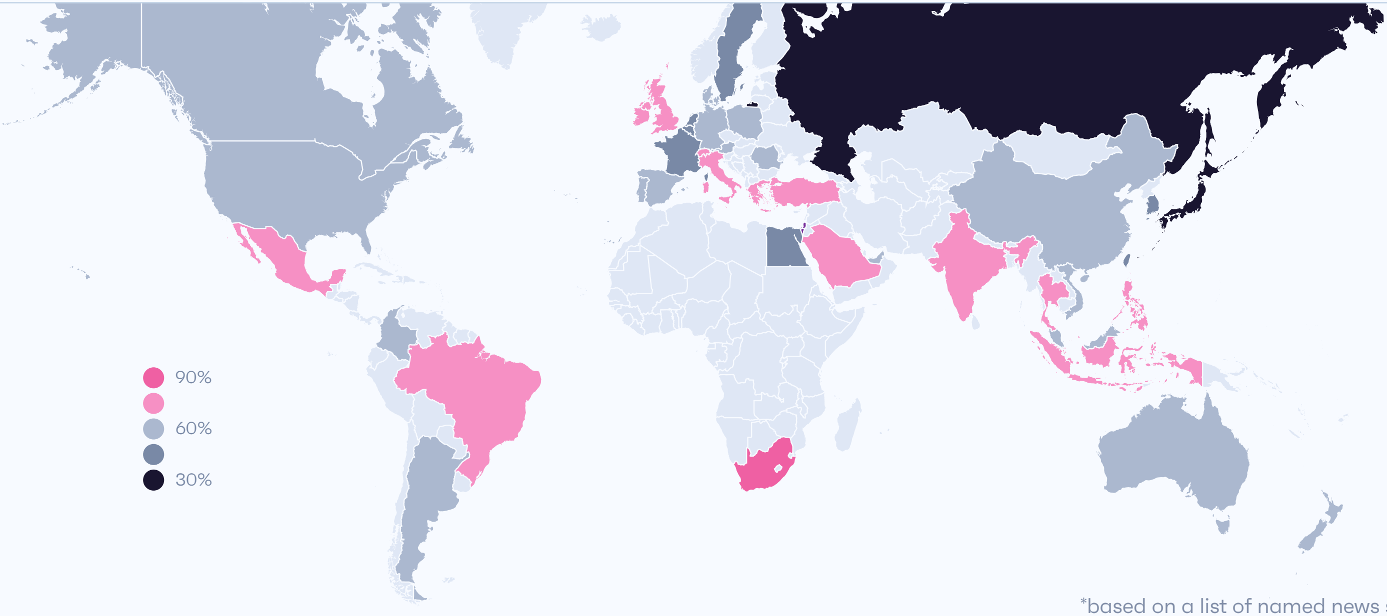
GWI Core Q1 2017 - Q4 2020 (averages of all waves conducted each year)

370,051 (2017) • 474,573 (2018) • 598,185 (2019) • 714,817 (2020)

internet users aged 16-64

% in each country, who say that news brands are trustworthy and accurate*

19



*based on a list of named news services

South Africa	82	Brazil	71	Austria	67	Egypt	58
Philippines	78	Hong Kong	71	New Zealand	67	Sweden	58
India	77	Singapore	70	USA	67	Belgium	57
Ireland	77	Vietnam	69	Poland	67	Netherlands	56
Indonesia	74	Colombia	69	Denmark	64	Taiwan	55
Thailand	74	UAE	69	Australia	64	France	54
Saudi Arabia	74	Greece	69	Romania	62	South Korea	52
Turkey	73	Spain	69	China	61	Israel	45
UK	73	Canada	68	Switzerland	61	Russia	38
Mexico	73	Malaysia	68	Germany	61	Japan	36
Italy	72	Portugal	68	Argentina	60		

GWI Core Q4 2020 124,758 internet users aged 16-64

*based on a list of named news services

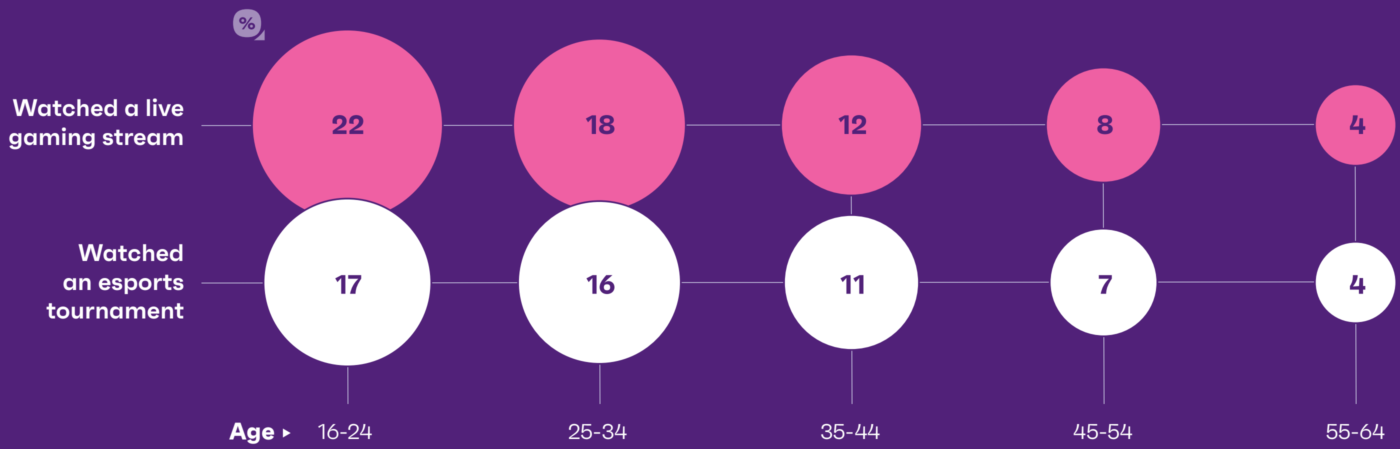
04

Gaming

The modern gaming landscape

Gaming activities

% of internet users who have done the following in the last month



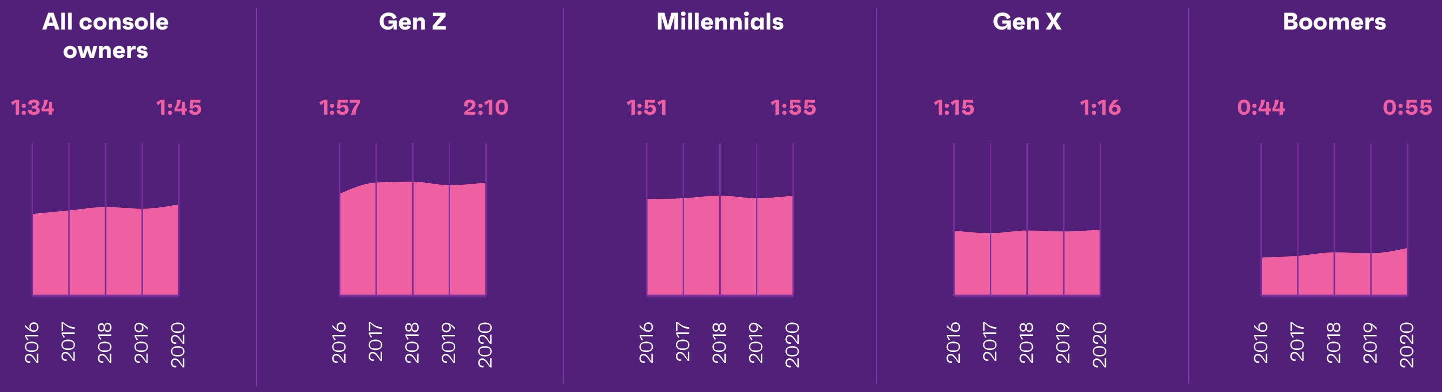
GWI Core Q1 2016 - Q4 2020 (averages of all waves conducted each year)

64,228 (2016) • 102,005 (2017) • 129,424 (2018) • 165,728 (2019) • 190,160 (2020) games console owners aged 16-64

Playtime

21

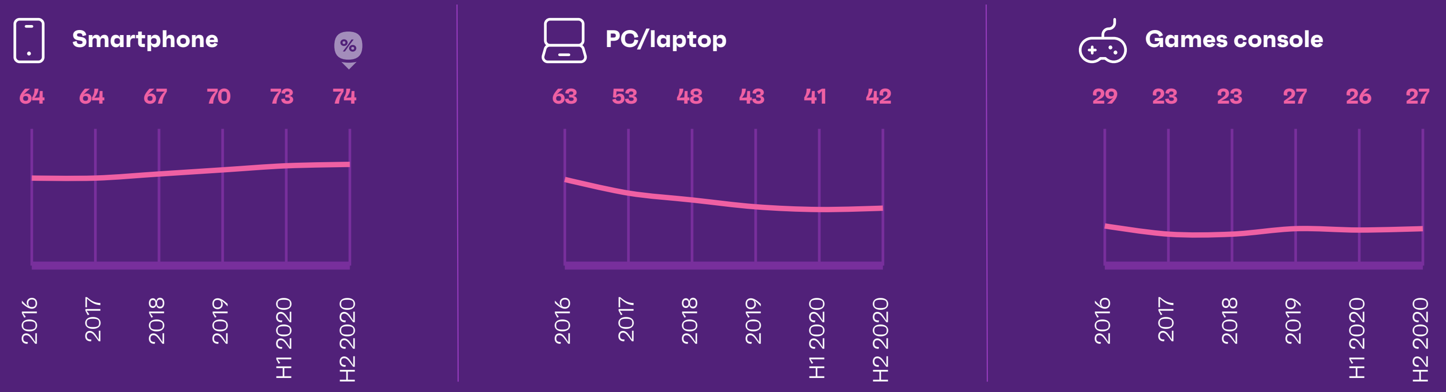
Average time spent each day on games consoles (h:mm)



Devices used for gaming

22

% of internet users who play games on the following



GWI Core Q4 2020

124,758 internet users aged 16-64

The number of grandparents who play games has grown 28% since 2018

The growth of gaming

Globally, gaming on any device fell seven percentage-points between 2016 and 2019, with particularly dramatic declines amid Gen X and baby boomers. At the same time, however, smartphone gaming climbed from 64% to 70%, as the likes of PC/laptops and games consoles began to subside. Gaming was changing quickly, bolstered by newcomer audiences who were finding more accessible ways to game through mobile devices.

As of 2020, people are spending more time playing games than they were before, brought on by long periods of lockdown and time lost elsewhere. Such is the impact that even baby boomers have shown considerable uptake in the activity, with 64% now playing games on any device – up eight percentage-points since 2019.

It's worth noting that playing games is just a part of the bigger picture; 22% of internet users have watched a live gaming stream or esports tournament in the last month, which is more than the number who watch the English Premier League (EPL) worldwide. These are typically accessed via platforms such as Twitch, but with **3.8 million viewers** tuning in for the LoL Worlds Final, and BT Sport securing **exclusive** rights to the V10 R-League tournament, the potential of esports on paid-for services is gaining momentum.

This is a gamer

Gamers don’t always look the way you expect. Download our report to meet the squad

Download report

TV viewers who watch on consoles are 65% more likely to watch children's TV

Games consoles and TV

Time spent on games consoles has enjoyed a steady climb since 2016, a trend generally considered driven by typical gaming audiences, such as Gen Zs and Millennials.

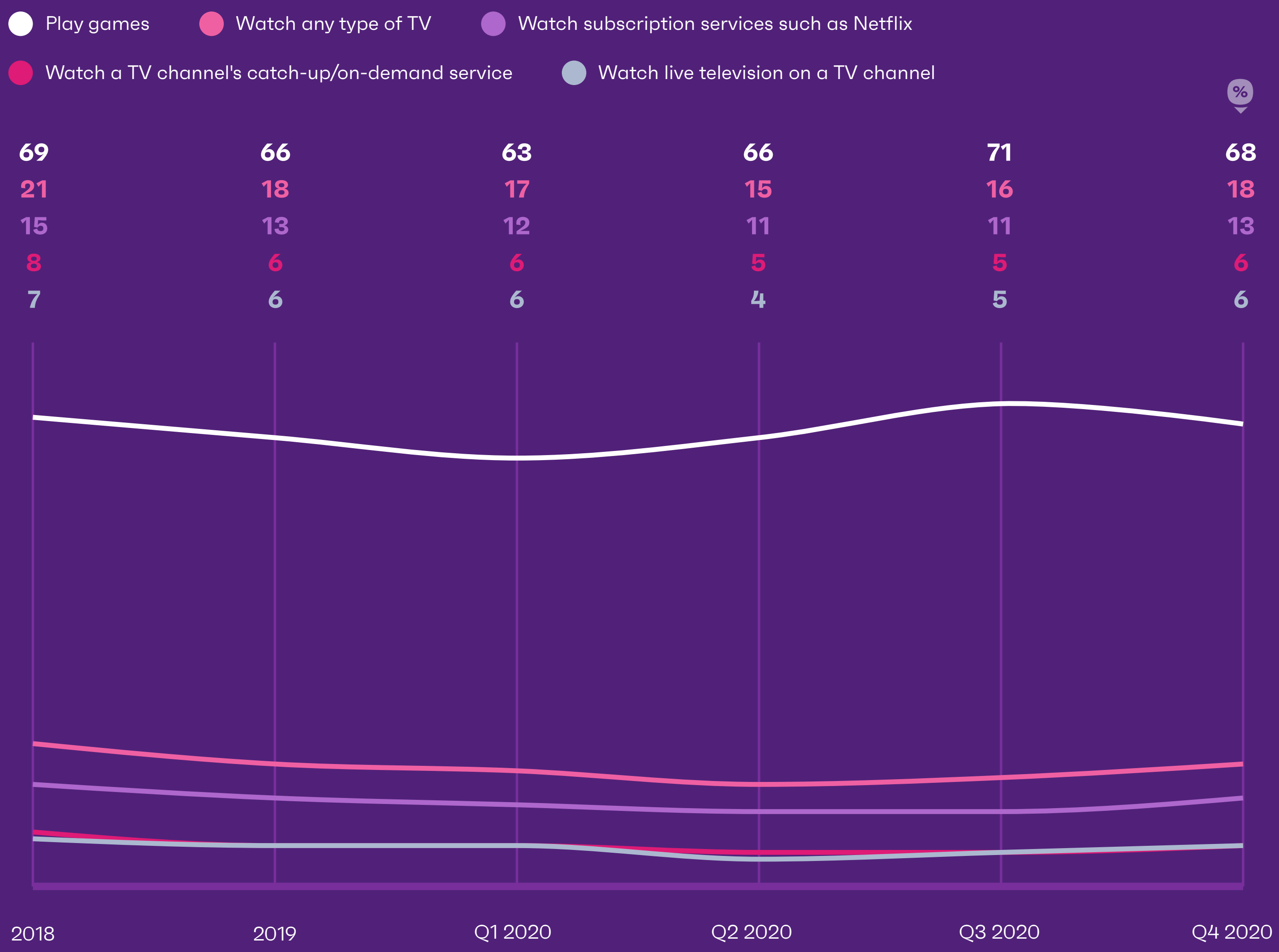
As of 2020, however, baby boomers are nearing the 1 hour mark for daily time spent here for the first time, suggesting a shift in the importance of consoles when it comes to media consumption and access.

Games consoles have long accommodated secondary behaviors; DVD capabilities, access to streaming services, web browsing and short-form video sites like YouTube – gaming is their primary function, but multimedia features have always been a priority.

As of Q4 2020, console owners playing games on these devices has fallen 4%, while viewing behaviors, such as watching streaming services or live TV, are showing signs of growing. Down the line, as more atypical gaming audiences turn to gaming, consoles could well be positioned as tempting alternatives to smart TVs and set-top box devices.

Games consoles as multi-media devices

% of console owners who use games consoles to do the following



GWI Core Q1 2018 - Q4 2020

129,424 (2018), 165,728 (2019) and 190,160 (2020) games console owners aged 16-64

05

Music/Audio

Music streaming on the charge, but radio still robust

In 2019, time spent listening to the radio led music streaming in 20 markets. By the end of 2020, this had fallen to 12 – all of which are in Europe, with the exceptions of Israel and Japan.

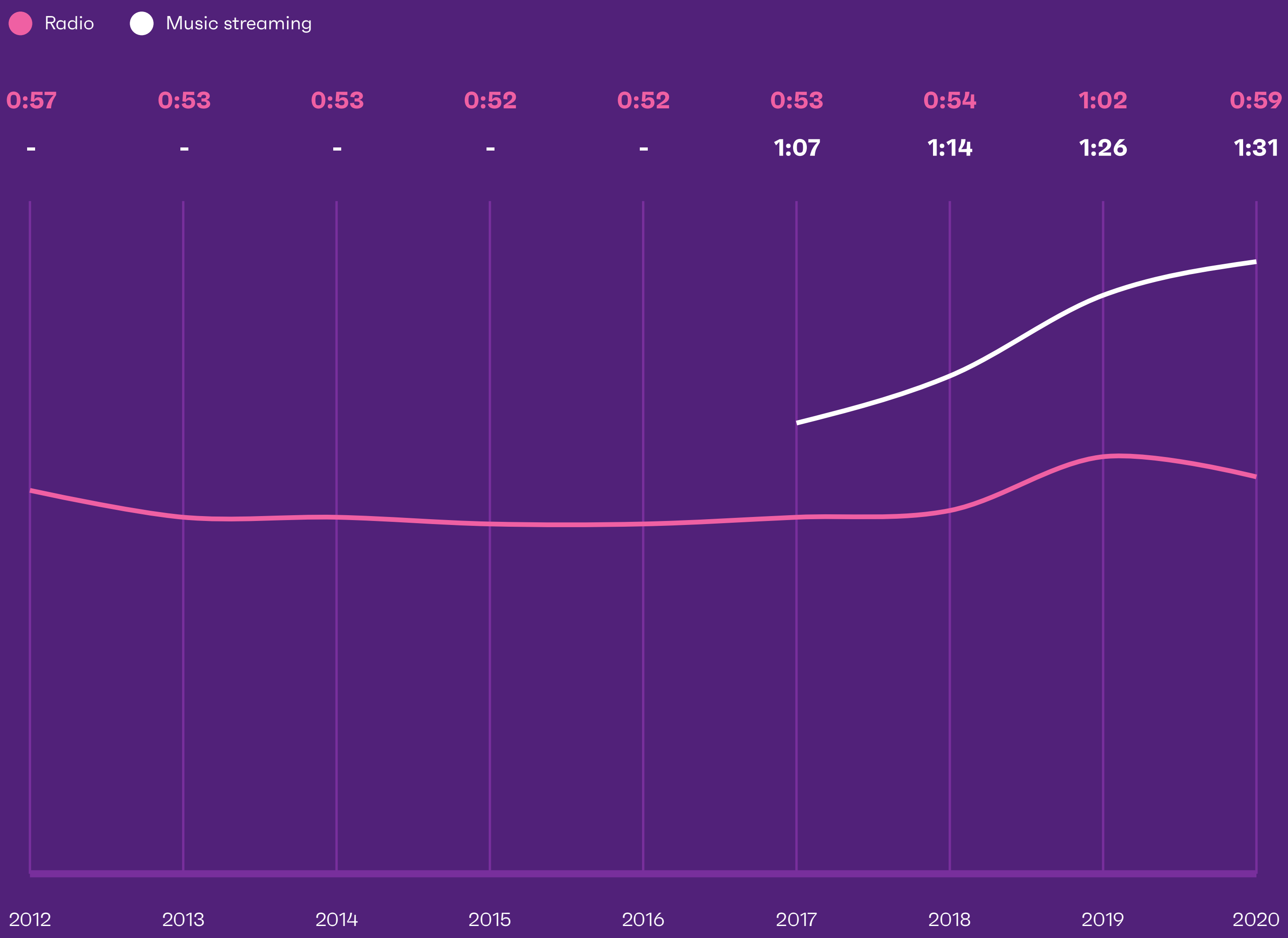
But while music streaming is growing at a rapid pace, it isn't necessarily coming at the expense of radio. Even as streaming, podcasts, and audio social spaces like Clubhouse emerge, radio remains incredibly robust. The average time spent listening to it per day has hardly changed in almost a decade.

100 years after the first commercial radio stations were founded, and even after a pandemic, radio continues to adapt to changed circumstances. Not only has average time spent per day stayed consistent, but few people are switching off completely. Radio reaches 3 in 4 consumers, and has done since we began tracking it in 2012.

Music streamers are more likely to discover new acts before they're popular, and to enjoy the process of doing so

Radio vs. streaming: over time

Average time spent each day on the following (h:mm)

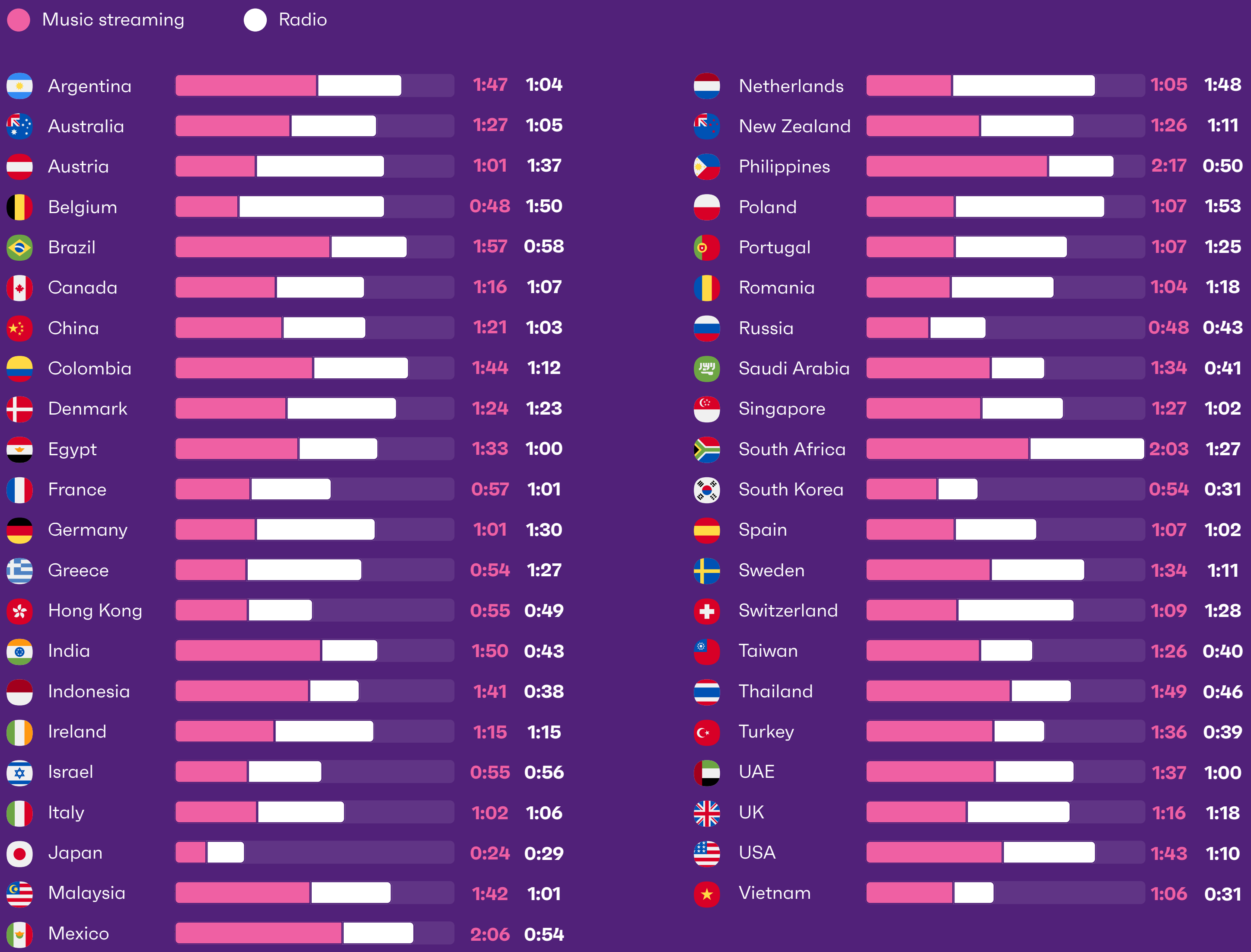


GWI Core Q4 2012 - Q4 2020 (averages of all waves conducted each year)

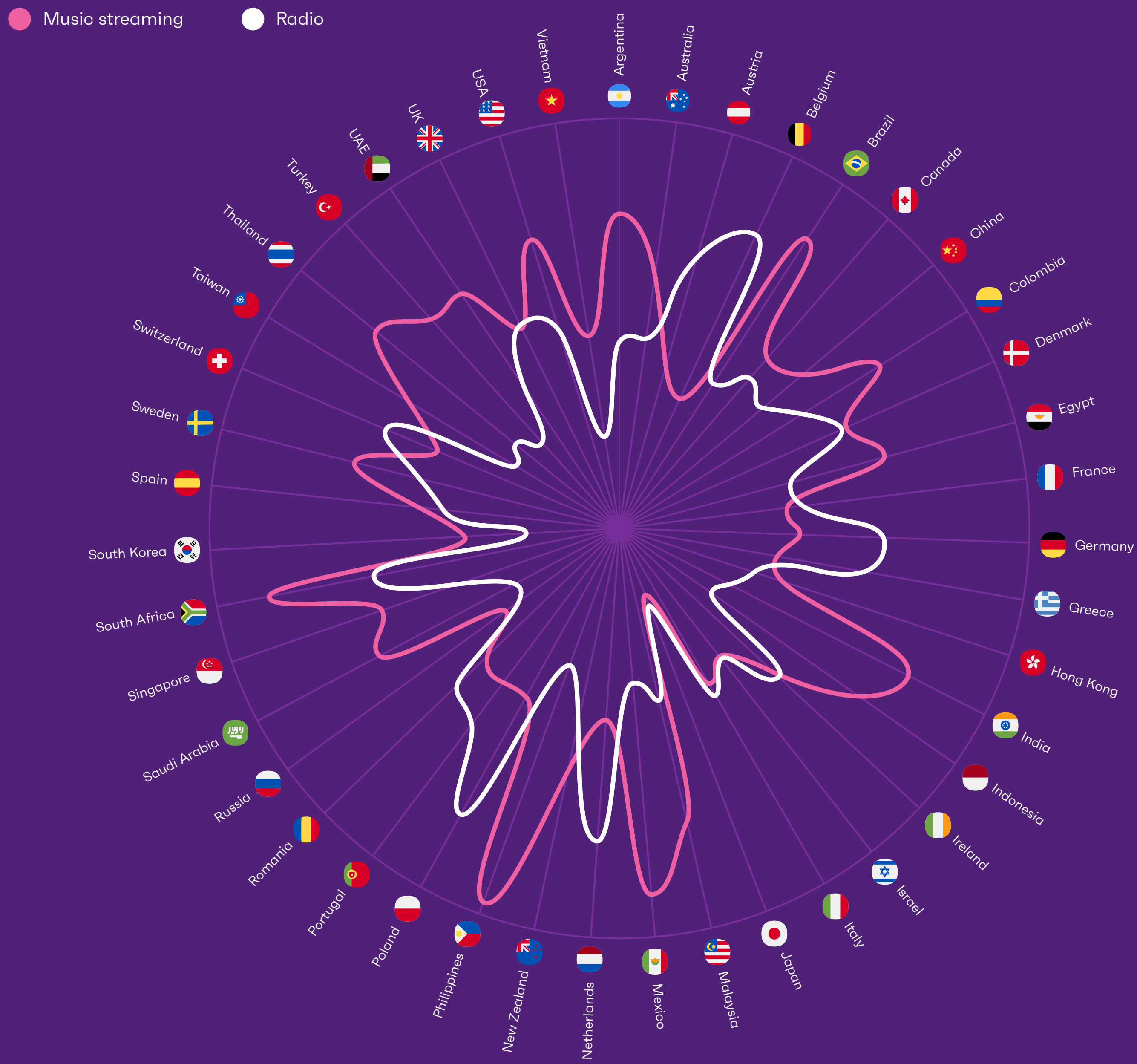
2,469,344 internet users aged 16-64

Radio vs. streaming: by country

Average time spent each day on the following (h:mm)



GWI Core Q4 2020 124,758 internet users aged 16-64



GWI Core Q4 2020 124,758 internet users aged 16-64

How listening habits are changing

By and large, consumers prefer listening to music defined by its place in time, rather than its genre. With the exception of 16-24s, all age groups say that 80s or 90s music is the kind they prefer to listen to most. The pattern of most listened-to decades is generally what you'd expect; age groups tend to prefer music from their teenage/early adult years. One interesting exception is 90s music, which has cross-generational appeal.

Looking beyond that, 16-24s look to be on the cusp of an important shift in listening preferences. Consumers over the age of 35 are connected by having rock and pop, the two genres central to popular music in the West since at least the 1960s, as their preferred genres. But for 16-24s, hip-hop/rap is now what sets the agenda in popular music. K-Pop has also made inroads with young listeners. In the U.S., it's (17%) more popular among 16-24s than EDM/ dance (14%).

Across all age groups, and all parts of the world, listeners' most preferred audio content is playlists they have made themselves. This is true even of people that don't use music-streaming services, which shows just how much listeners carve out their own listening experiences in the age of digital media. Even so, there is still a desire for curation, both in the form of platform-made playlists and in bestseller lists. Physical releases on CD/vinyl still remain relevant in some corners of the world, particularly Japan and North America.

16-24s listen to more hip-hop/rap than pop or rock

Music genres

% who like listening to the following genres

16-24s	%	25-34s	%	35-44s	%	45-54s	%	55-64s	%
Hip-Hop/Rap	34	90s music	41	90s music	45	80s music	51	80s music	53
90s music	32	Rock	33	80s music	37	90s music	46	50s/60s/70s music	44
Rock	31	Pop/Top 40	30	Rock	34	Rock	37	90s music	39
Pop/Top 40	29	80s music	28	Pop/Top 40	30	Pop/Top 40	31	Rock	38
00s music	24	Hip-Hop/Rap	27	00s music	25	50s, 60s, 70s music	30	Country	28

Preferred audio content

% who most like to listen to the following

16-24s		25-34s		35-44s		45-54s		55-64s	
My own playlists	59	My own playlists	52	My own playlists	51	My own playlists	48	My own playlists	42
Music platform	32	Top of the charts	31	Top of the charts	29	Radio shows	31	Radio shows	33
Top of the charts	31	Music platform	30	Radio shows	28	Top of the charts	25	CD/Vinyl	28
Remixes/covers	24	Radio shows	25	Music platform	27	Music platform	23	Top of the charts	20
Podcasts	21	Remixes/covers	22	Remixes/covers	19	CD/Vinyl	22	Music platform	17

GWI Core Q4 2020 124,758 internet users aged 16-64

Podcasts: a surprising pandemic success story

During the early stages of the COVID-19 pandemic, podcasts were **widely predicted** to suffer, with listening no longer able to happen on the commute. Instead, they have thrived.

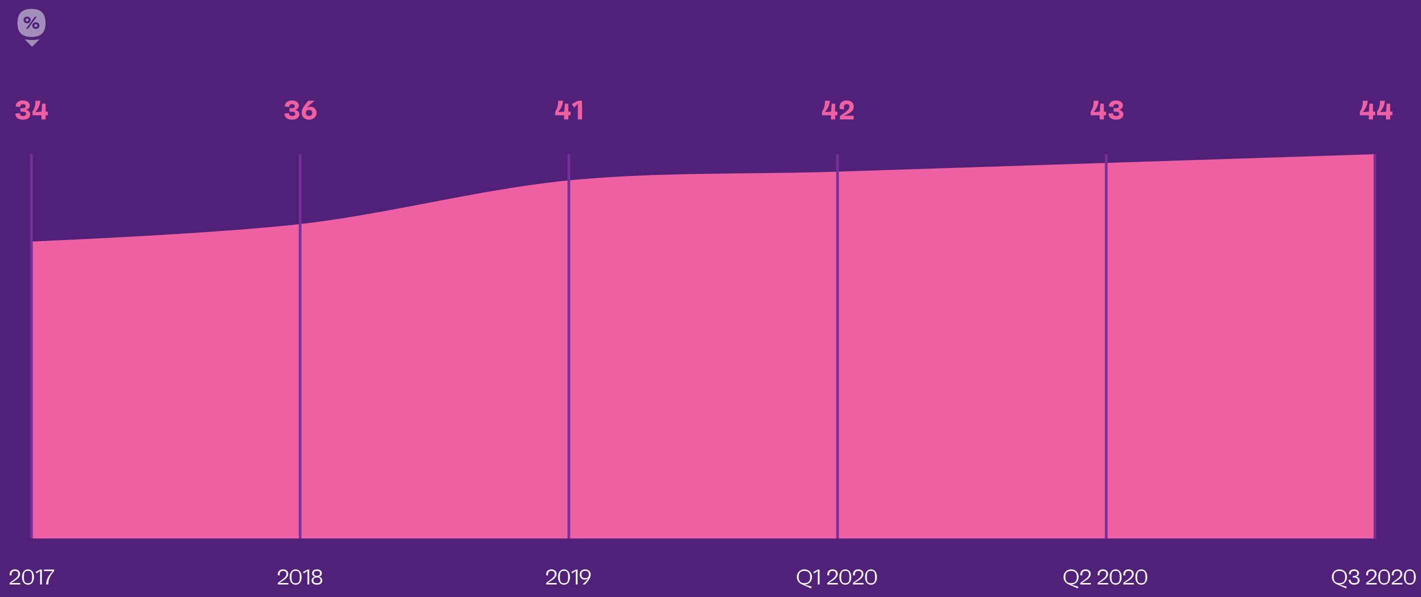
Our GWI USA dataset allows us insight into the most popular podcast genres among American consumers, and comparing them with the most popular kinds of TV programming is instructive. In TV, comedy and drama are the most popular genres across all age groups, but for podcasts, factual genres become more important for the 45+. Music, understandably, is also more popular in audio form, while true crime hits the top 3 for 16-34s.

Podcasts have also put down roots in what some may consider to be unexpected places. Their popularity in Arab countries has encouraged streaming service Deezer to **expand** its footprint in the region, while China's podcast market, sometimes viewed as synonymous with the country's "pay for knowledge" economy, has seen audio-led storytelling gain traction. *Gushi FM* has been **likened** to *This American Life* in its focus on the stories of ordinary people, and attracts more than 500,000 listeners per episode.

The number of podcast listeners grew 8% YoY, even during a pandemic

The growth of podcasts

% who have listened to or watched a podcast in the past month

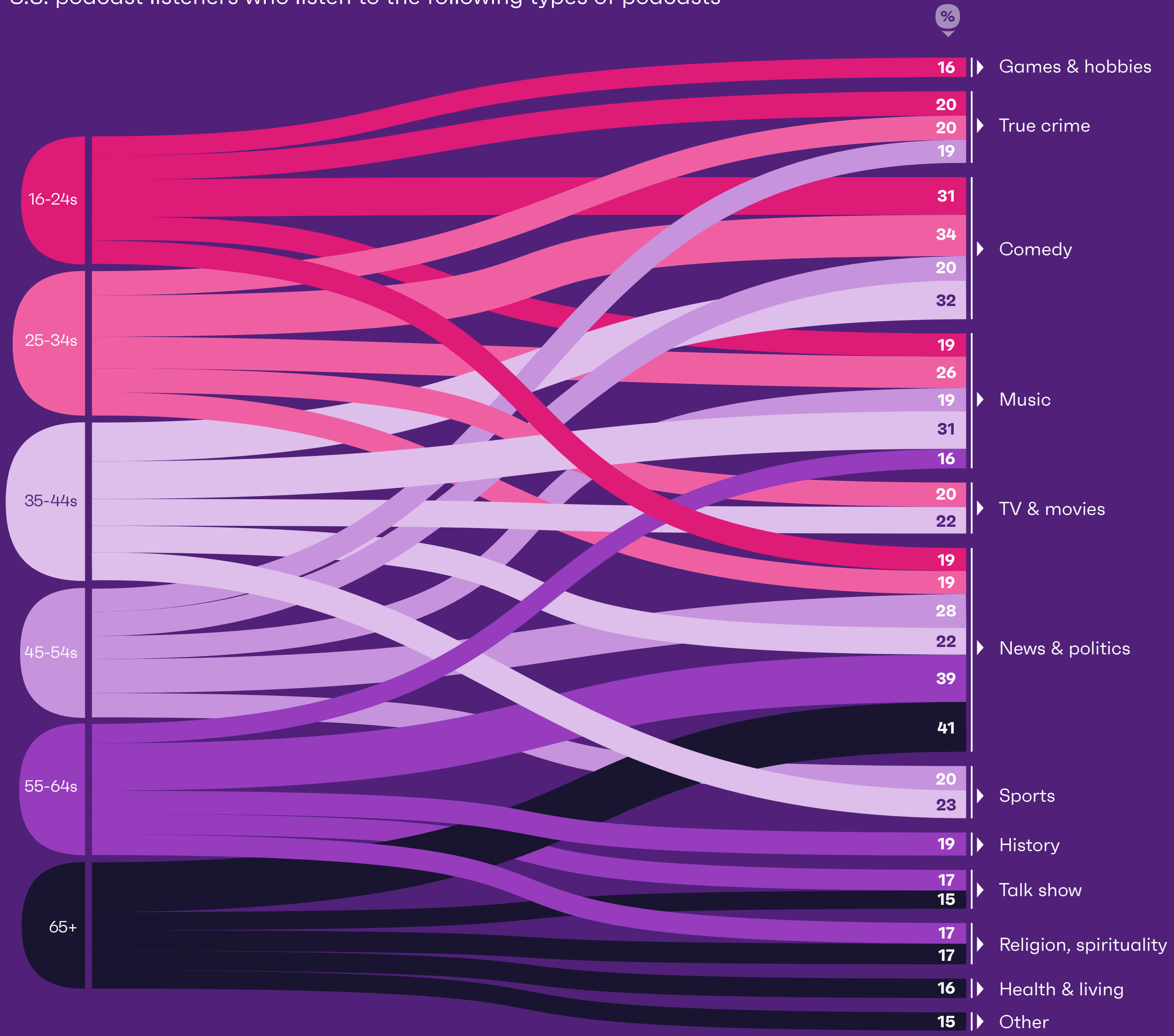


GWI Core Q1 2017 - Q3 2020 (averages of all waves conducted each year)

370,051 (2017) • 474,573 (2018) • 598,185 (2019) • 533,965 (2020) internet users aged 16-64

Podcasts genres in the U.S.

% of U.S. podcast listeners who listen to the following types of podcasts



GWI USA Q1 2021

5,891 podcast listeners, in the U.S., aged 16-64

Podcasts: by country

Average time spent per day listening to podcasts (h:mm) | % who listen per month

Country	Average time spent per day (h:mm)	% who listen per month
Argentina	0:38	33
Australia	0:46	36
Austria	0:23	27
Belgium	0:24	23
Brazil	0:54	46
Canada	0:32	32
China	1:05	56
Colombia	0:49	44
Denmark	0:43	35
Egypt	1:01	38
France	0:29	26
Germany	0:28	30
Greece	0:17	20
Hong Kong	0:29	38
India	1:04	50
Indonesia	0:48	63
Ireland	0:42	43
Israel	0:22	26
Italy	0:27	26
Japan	0:09	10
Malaysia	0:37	38
Mexico	0:52	51
Netherlands	0:26	24
New Zealand	0:32	35
Philippines	0:44	44
Poland	0:35	37
Portugal	0:27	33
Romania	0:28	30
Russia	0:20	22
Saudi Arabia	1:09	52
Singapore	0:35	35
South Africa	0:52	39
South Korea	0:22	21
Spain	0:29	39
Sweden	0:47	37
Switzerland	0:29	31
Taiwan	0:37	46
Thailand	1:05	48
Turkey	0:30	31
UAE	0:59	45
UK	0:37	33
USA	0:53	39
Vietnam	0:35	35

GWI Core Q4 2020 | 124,758 internet users aged 16-64

06

Ads/ Subscriptions

Most effective ad channels

Though its effectiveness has waned in recent years, TV remains the most effective media channel for consumers to discover brands via advertising. Change could be on the horizon, though – in 2020 ads seen on social media overtook ads seen on TV among 16-24s for the first time.

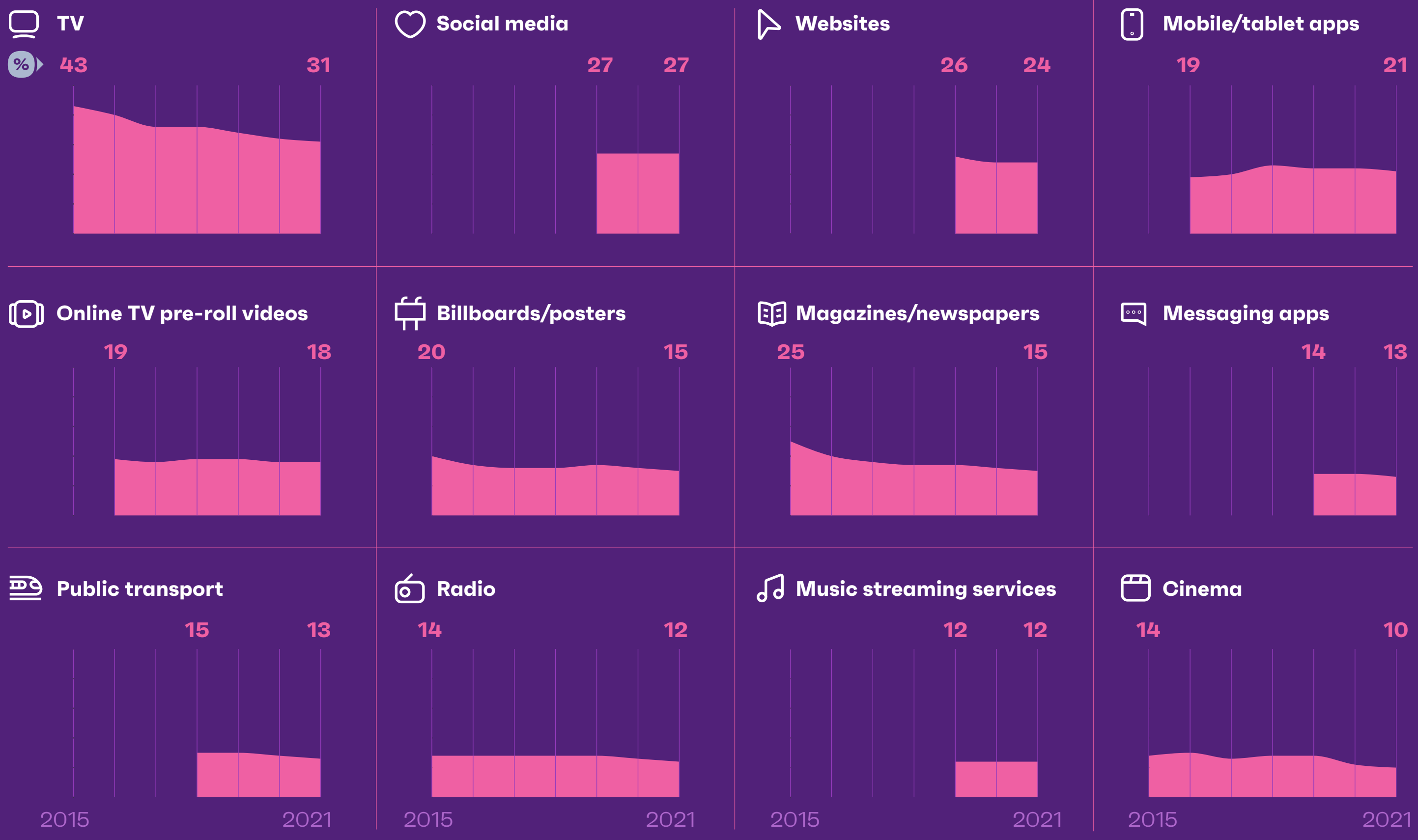
TV ads do possess the advantage of being seen in a more positive light. Consumers are **more likely** to see TV ads as "entertaining" or "informative", whereas social media and other online ads are more likely to be seen as "excessive" or "intrusive".

Looking at the bigger picture since 2015 shows just how many more routes to brand discovery there now are. The split of attention across different media is reflected in the number of possible sources through which a consumer could discover a brand. Whereas in 2015 TV, press, and outdoor could still command the lion's share of attention, the picture now is more fragmented.

Social media ads are challenging TV for effectiveness

Brand discovery by medium

% who discover brands through ads on the following



GWI Core Q2 2015 - Q1 2021 (averages of all waves conducted each year) 2,699,828 internet users aged 16-64

Media reach vs. ad impact

% who use the following each day/discover brands via ads seen on...

GWI Core Q4 2020

180,852 internet users aged 16-64

*impact is defined as the % who discover brands through stories on online magazines/newspapers, not ads

After early promise, the pandemic failed to create a new culture of paying for news

The state of subscriptions

Alongside increasing levels of consumption in recent years, both TV and music services have converted more free users and trialists into paying subscribers. Paying for news content, though, remains low. Even after one of the most eventful years in history, only 1 in 10 readers of online press pay for it each month.

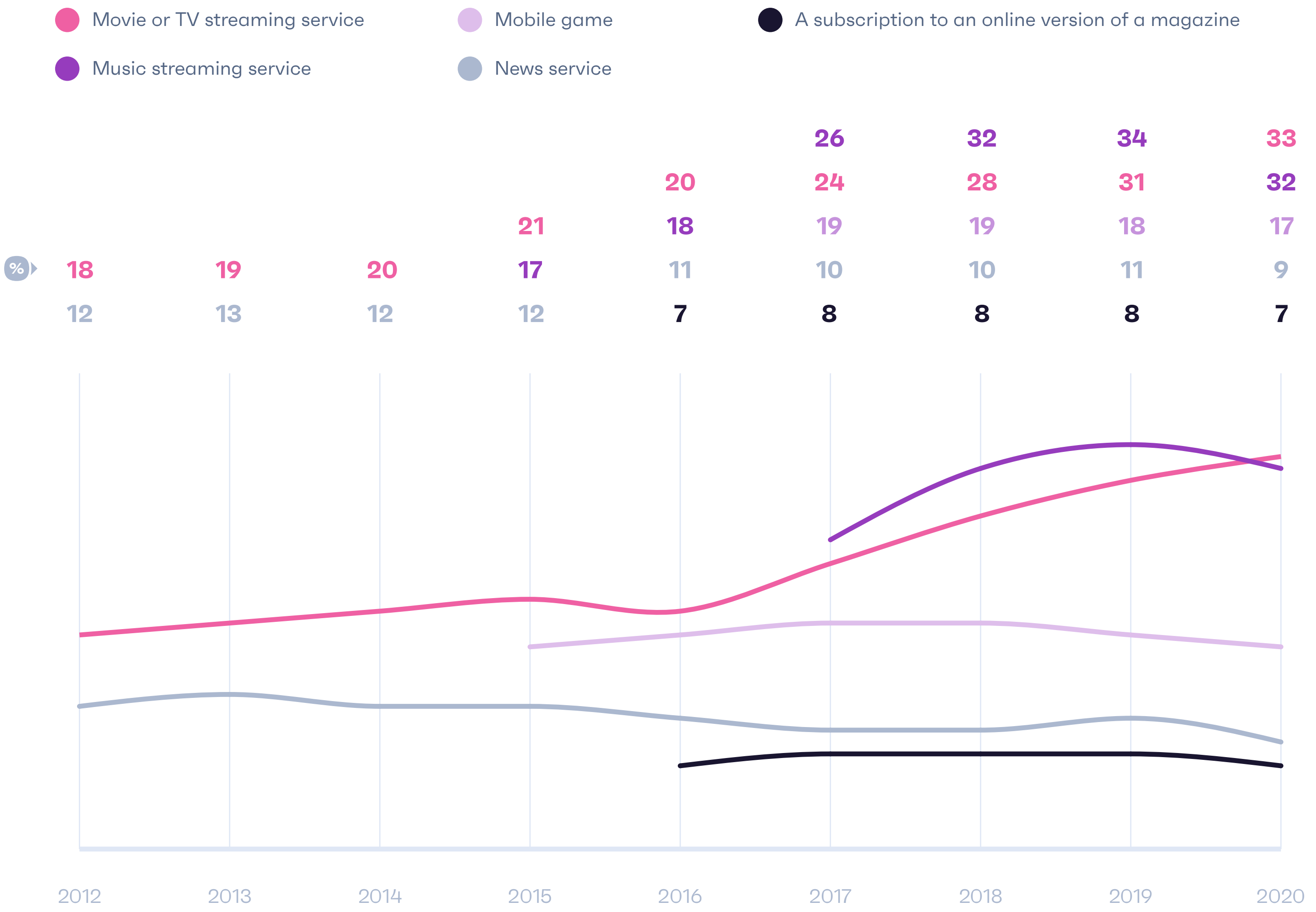
It's worth rewinding to the early stages of the pandemic to consider this in context. In March 2020, 33% of consumers in the U.S., and 16% in the UK, said they would be willing to pay for a news source to keep them accurately updated about coronavirus. At the time, we **predicted** there would be a small window of opportunity for publishers to best demonstrate the value of their news coverage to consumers. As the pandemic moved on from its most acute stage, this seems to have passed.

If there's a lesson from the pandemic for monetizing news, it's how important it is to drive conversions at the acute stage of crisis, especially if more unexpected events like COVID-19 emerge – though this obviously has to be balanced with the public interest incentive. *The Atlantic* **did this** by using a two-tier strategy to drop the paywall from some of science journalist's Ed Yong's longform pieces, but leaving it in place for other COVID-related content. Maintaining this balance also helps avoid any sense of profiteering, or creation of information inequality.

Using vs. paying

32

% of users of the following services who have also paid for them



GWI Core Q1 2012 - Q4 2020 (averages of all waves conducted each year)

1,190,404 online TV viewers aged 16-64 • 1,015,682 music streamers aged 16-64 • 721,448 smartphone gamers aged 16-64 • 1,226,733 online press readers aged 16-64

Appendix

1. Which of the following devices do you own?
2. On an average day, how long do you spend...
3. On an average day, how long do you spend...
4. On an average day, how long do you spend...
5. GWI Media Consumption Segmentation
6. On an average day, how long do you spend...
7. Sourced from multiple questions
8. On an average day, how long do you spend watching: television | online television/ streaming?
9. In the past month, which devices have you used to do the following?
10. In the last month, which of these services have you used to watch/download TV shows, films or videos?
11. In a typical week, which of these genres will you have watched on television?
12. Which of the following sports do you watch on broadcast TV/online?
13. Which of these things do you do online when watching TV?
14. Which of these devices do you often use while watching television?
15. On an average day, how long do you spend on print press/ online press?
16. For these services, could you tell us where you have seen one of their videos, articles or stories online during the last 30 days?
17. Please could you select the qualities that you would associate with each of these news brands? (Trustworthy & accurate)
18. Please could you select the qualities that you would associate with each of these news brands? (Trustworthy

& accurate)

19 Thinking about gaming, which of these things have you done in the last month?

20 On an average day, how long do you spend on games consoles?

21 Which of these devices do you use to play games?

22 Which of these devices do you use to play games?

23 In the past month, which devices have you used to do the following?

24 On an average day, how long do you spend listening to the radio/on music-streaming services?

25 On an average day, how long do you spend listening to the radio/on music-streaming services?

26 Which of these music genres do you like listening to?

27 In the past month, which of the following things have you done on the internet via any device? (legacy)

28 Which types of podcast do you listen to? (GWI USA)

29 On an average day, how long do you spend listening to podcasts? | In the past month, which of the following things have you done on the internet via any device?

30 How do you typically find out about new brands and products?

31 On an average day, how long do you spend... | How do you typically find out about new brands and products?

32 In the last month, which of these have you paid for?

Notes on methodology

Introduction

All figures in this report are drawn from GWI's online research among internet users aged 16-64. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

Our research

Each year, GWI interviews over 700,000 internet users aged 16-64 across 47 markets. Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles and digital behaviors. We source these respondents in partnership with a number of industry-leading panel providers.

Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

Our quotas

To ensure that our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the "weight" of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

Sample size by market

This report draws insights from GWI's Q4 2020 wave of research across 47 countries, with a global sample of 180,852 respondents.

Argentina	1,491
Australia	3,995
Austria	1,245
Belgium	1,248
Brazil	5,499
Canada	4,780
China	24,105
Colombia	2,499
Denmark	1,502
Egypt	1,675
France	5,018
Germany	4,983
Ghana	896
Greece	1,278
Hong Kong	1,779
India	14,037
Indonesia	5,012
Ireland	1,247
Israel	1,511
Italy	4,995
Japan	4,878
Kenya	993
Malaysia	2,835
Mexico	4,303
Morocco	1,008
Netherlands	1,241
New Zealand	1,239
Nigeria	974
Philippines	2,988
Poland	2,008
Portugal	1,243
Romania	1,253
Russia	3,515
Saudi Arabia	1,512
Singapore	2,750
South Africa	1,492
South Korea	1,877
Spain	4,998
Sweden	2,494
Switzerland	1,499
Taiwan	2,244
Thailand	3,766
Turkey	2,001
UAE	1,782
UK	10,007
USA	24,475
Vietnam	2,682

Mobile survey respondents

From Q1 2017 on, GWI has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this **document.**

Internet penetration rates: GWI versus ITU figures

As GWI's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically. Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Internet penetration rates across GWI's markets

GWI's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. This is the case throughout much of LatAm, MEA and Asia Pacific.

Internet penetration rates (GWI's Forecasts for 2020 based on 2018 ITU data)

This table provides GWI forecasts on internet penetration (defined as the number of internet users per 100 people) in 2020.This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GWI conducts online research in.

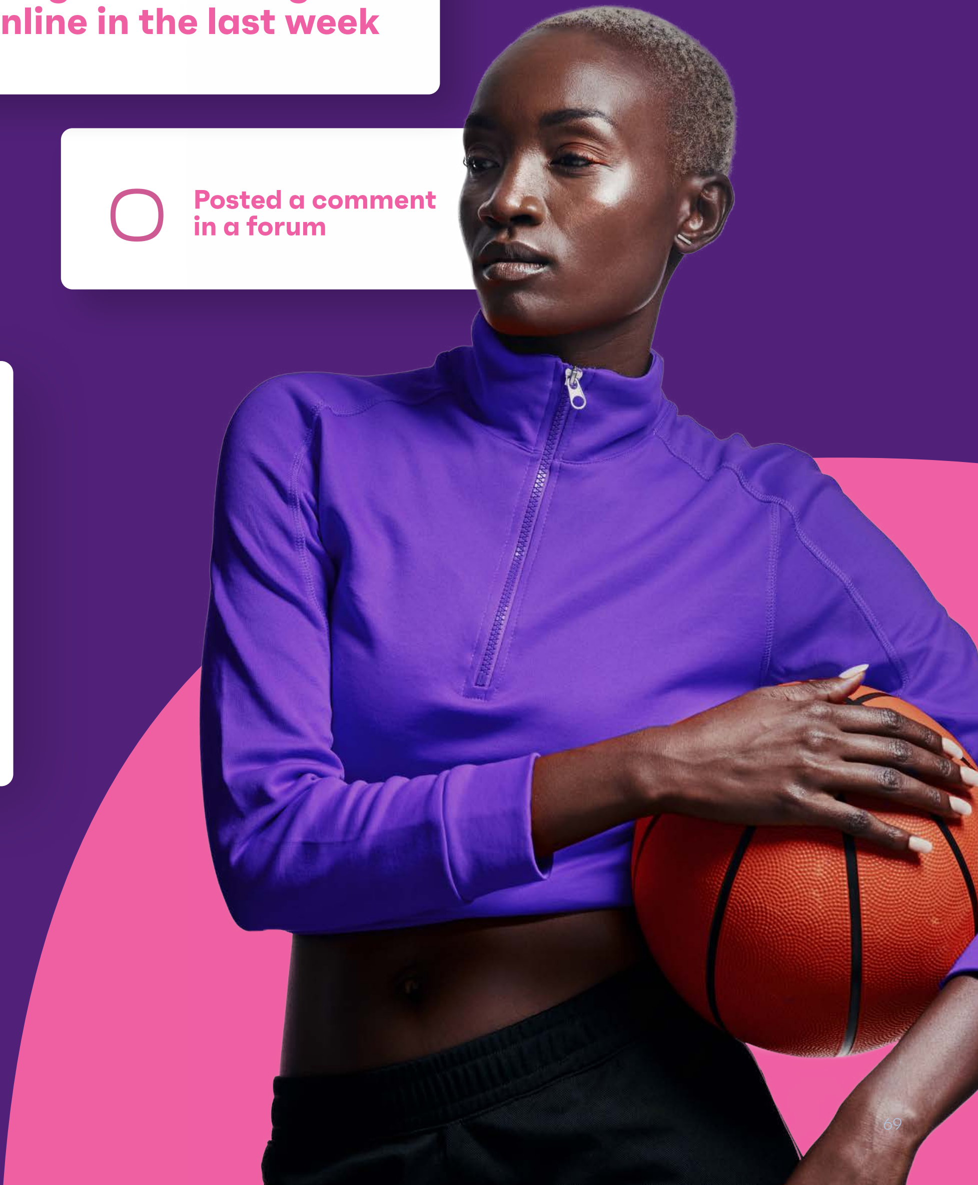
Country	%
Argentina	83
Australia	91
Austria	91
Belgium	92
Brazil	77
Canada	95
China	66
Colombia	69
Denmark	98
Egypt	59
France	87
Germany	93
Ghana	51
Greece	80
Hong Kong	93
India	47
Indonesia	49
Ireland	88
Israel	90
Italy	79
Japan	94
Kenya	42
Malaysia	86
Mexico	74
Morocco	74
Netherlands	96
New Zealand	94
Nigeria	51
Philippines	68
Poland	83
Portugal	79
Romania	78
Russia	89
Saudi Arabia	93
Singapore	91
South Africa	64
South Korea	98
Spain	93
Sweden	96
Switzerland	96
Taiwan	91
Thailand	63
Turkey	80
UAE	99
UK	97
USA	92
Vietnam	73

Bought something online in the last week

Posted a comment in a forum

1/4

buyers say blogs are very influential when researching a new product



GWI.