The global media landscape

GWI's flagship report on the latest trends in global media

GWI.

In this report

Click the dots to navigate

Methodology

All figures in this report are drawn from GWI's online research among internet users aged 16-64. 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 younger and more urban, affluent and educated than the total population.

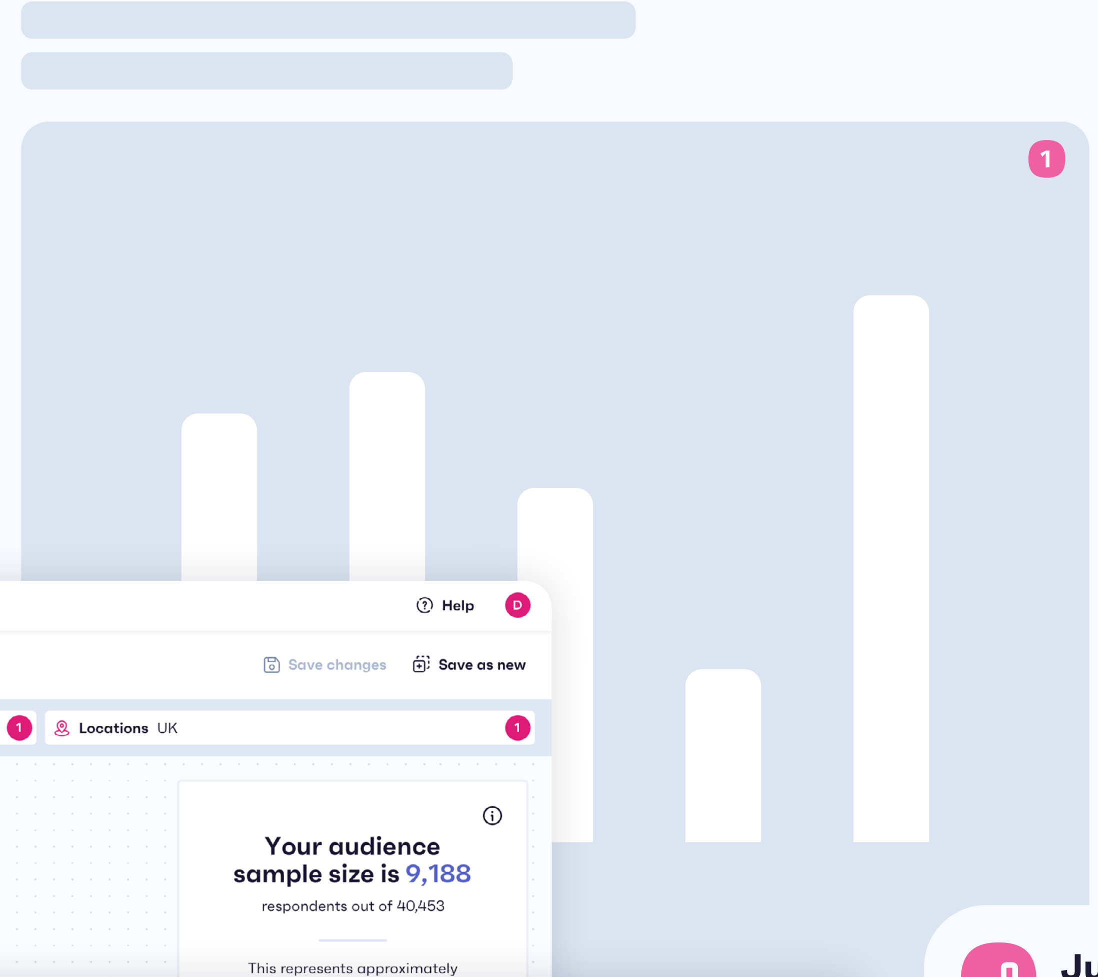
Each year, GWI interviews over 900,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all 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 focus on data from our ongoing global quarterly research, but also refer to our monthly Zeitgeist studies across 12 markets.

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.

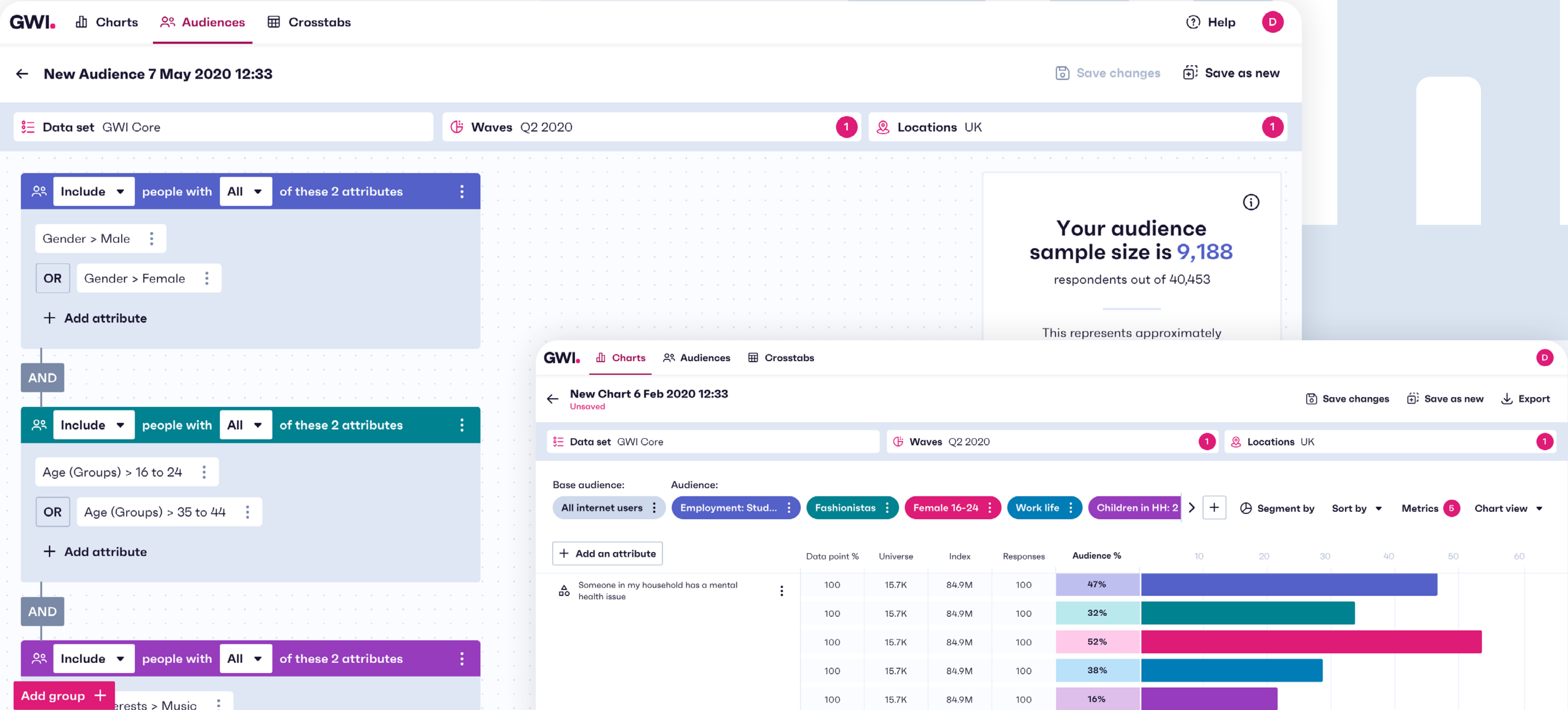
Discover the data on our platform

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.



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

Smart devices are in high demand.

The pandemic accelerated demand for smart devices, something that's stuck post-pandemic too. Smart home product ownership increased by 41% worldwide since 2019, while smartwatch ownership doubled, heightened by demand for at-home health and fitness tracking during the lockdown period.

In the US, trust in the media continues to fall.

The past three years have been big for news but interest is falling. This decline is due to misinformation and overexposure, which is creating a sense of fatigue. According to our September 2022 Zeitgeist, when thinking about this time last year only 13% of internet users said they trusted the news. Thinking about trust in the media today, the number who say they do has fallen by 14%.

TV viewing on consoles grew 15% year-on-year.

Users are spending more time on their games consoles, although ownership has plateaued. TV viewing on consoles is popular among millennials and in APAC, with the number of console owners watching television on their device growing year-on-year. These viewers spend significantly longer than average each day watching streaming services.

Comedy is the most popular podcast genre for younger generations.

Podcasting is still on the rise. It's moved into the top 5 preferred types of music and audio content, and the industry as a whole is expected to make $4 billion annually by 2024. Comedy is the most popular genre among 16-24s, 25-34s, and 34-44s. True crime has also gained traction as the second most popular genre among these age groups.

Social media is how Gen Z finds products.

TikTok and Instagram are becoming the key places for brand discovery – especially among younger generations. Since 2015, the number of people searching for products on social media has risen by 43%. Ads on social are becoming more curated for the consumer and purchasing an item takes less time.

01 Media consumption overview

Device ownership

Despite plateauing over the last three years, smartphone ownership is now so ubiquitous that it's spurred growth of other devices connected to the IoT (Internet of Things).

Smart TV ownership, in particular, saw a dramatic increase over the past few years – climbing 19% since 2018. This is **especially the case** in North America (+26%) and Latin America (+41%).

The same can be said for the wearables market. Smartwatch ownership has doubled in the past three years, while smart wristband ownership has grown by 46% in the same timeframe. Notably, this growth has stuck post-pandemic, as ownership of smart tech continues to tick upward in 2022.

Some devices have, however, seen quite a decline. PC/Laptop ownership has dropped by 19% since 2018, despite a brief spike during the pandemic, when pent-up demand was higher. The same can be said for e-Readers, with ownership declining by 20% during this time.

Smart home product ownership has increased by 41% worldwide since 2019

Device ownership

% who own the following devices

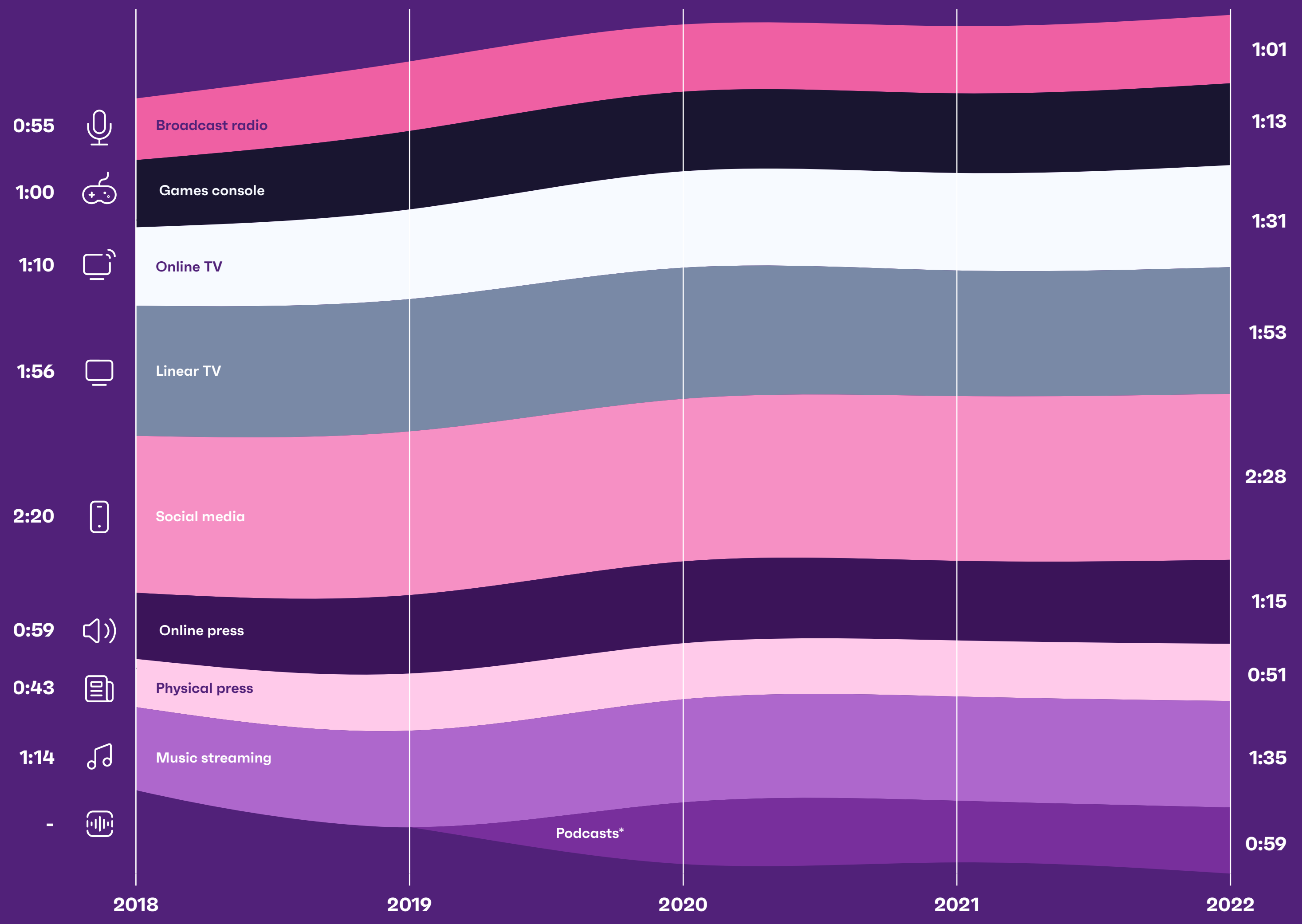
3,073,732 internet users aged 16-64 *added in Q1 2019

GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)

The evolution of media

Average daily time spent on the following (h:mm)

2



*added in Q1 2020

GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022) 3,073,732 internet users aged 16-64

Media habits in 2022

After a brief spike during the pandemic, daily time spent watching broadcast TV has fallen by 3 minutes worldwide since 2018. At the same time, although time spent watching online TV is lower than its broadcast counterpart, the format continues to make impressive growth – daily time spent is up 21 minutes since 2018, and has climbed quickest among Gen X viewers (+23 minutes).

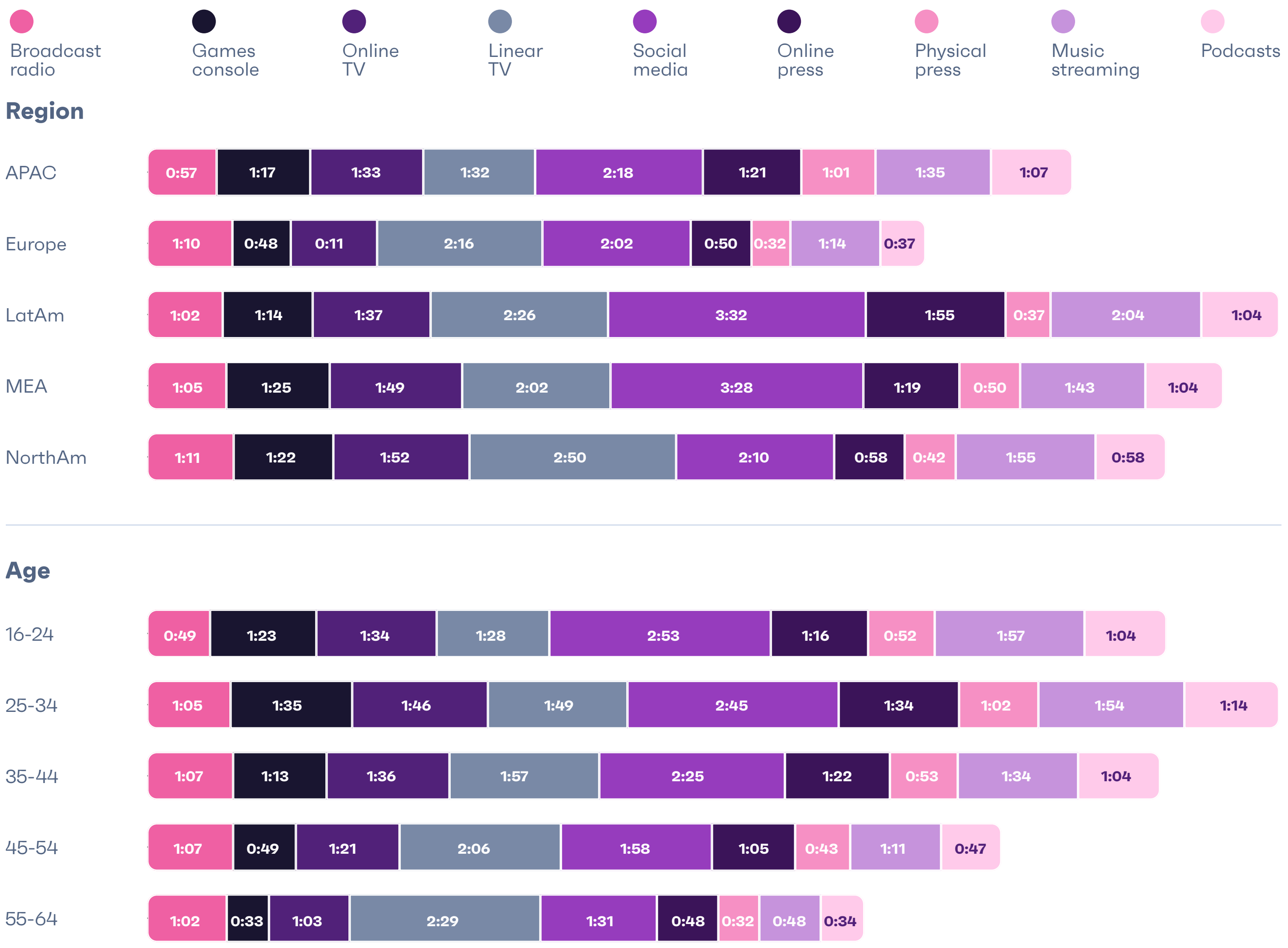
Social media continues to take up the greatest share of audiences' daily time in 2022. In Latin America and the Middle East & Africa, consumers spend over 3 hours a day browsing through their feeds. While this is mostly driven by younger audiences (Gen Z/millennials average 2 hours 44 minutes on social media per day) Gen X/boomers now spend just shy of 2 hours there too – up 14 minutes since 2018.

Apart from APAC, consumers across markets are spending 50 minutes or less on physical press in 2022. The convenience of online press makes it easier to find, track, and share news stories, with daily time spent there only increasing, reaching a high of 1 hour 15 minutes in 2022.

3

Media habits across demographics

Average daily time spent on the following (h:mm)



(Links on page 10)

GWI Core Q2 2022 244,231 internet users aged 16-64

PC vs. mobile

Average daily time spent on the following (h:mm)

GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)

3,073,732 internet users aged 16-64

Media effectiveness

We can get further insights into media effectiveness by plotting average time spent per day against its maximum reach. As might be expected, mobile dominates consumers' time spent and attention in 2022, with a reach of 98% globally.

Despite falling time spent, our data shows broadcast TV's resilience – reaching a greater share of consumers than its online counterpart, and remaining a top source of brand discovery in turn. That being said, online TV is still growing quickly, and reaches more consumers with each passing year.

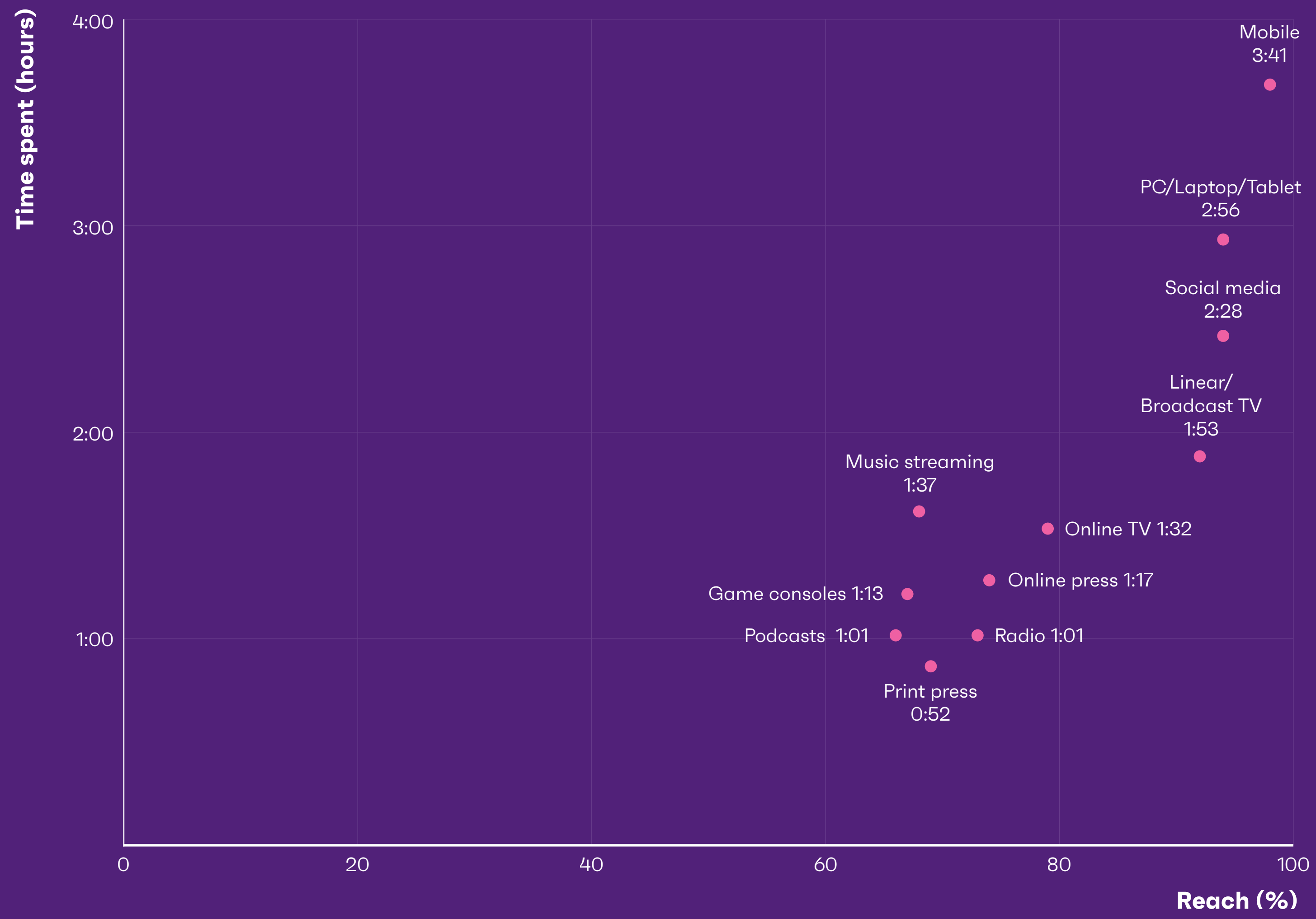
Social media deserves a shout out here too. Occupying a sizable share of consumers' daily time, and reaching 94% of consumers, the format ranks ahead of competition from all other forms of media. This is down to many social platforms acting as a hub for all their users content needs, where formats like short-form video keep them scrolling and interacting for longer.

Internet users spend nearly 2½ hours a day on social media

5

Reach vs. time spent

Average daily time spent on the following (h:mm) and the % who use them



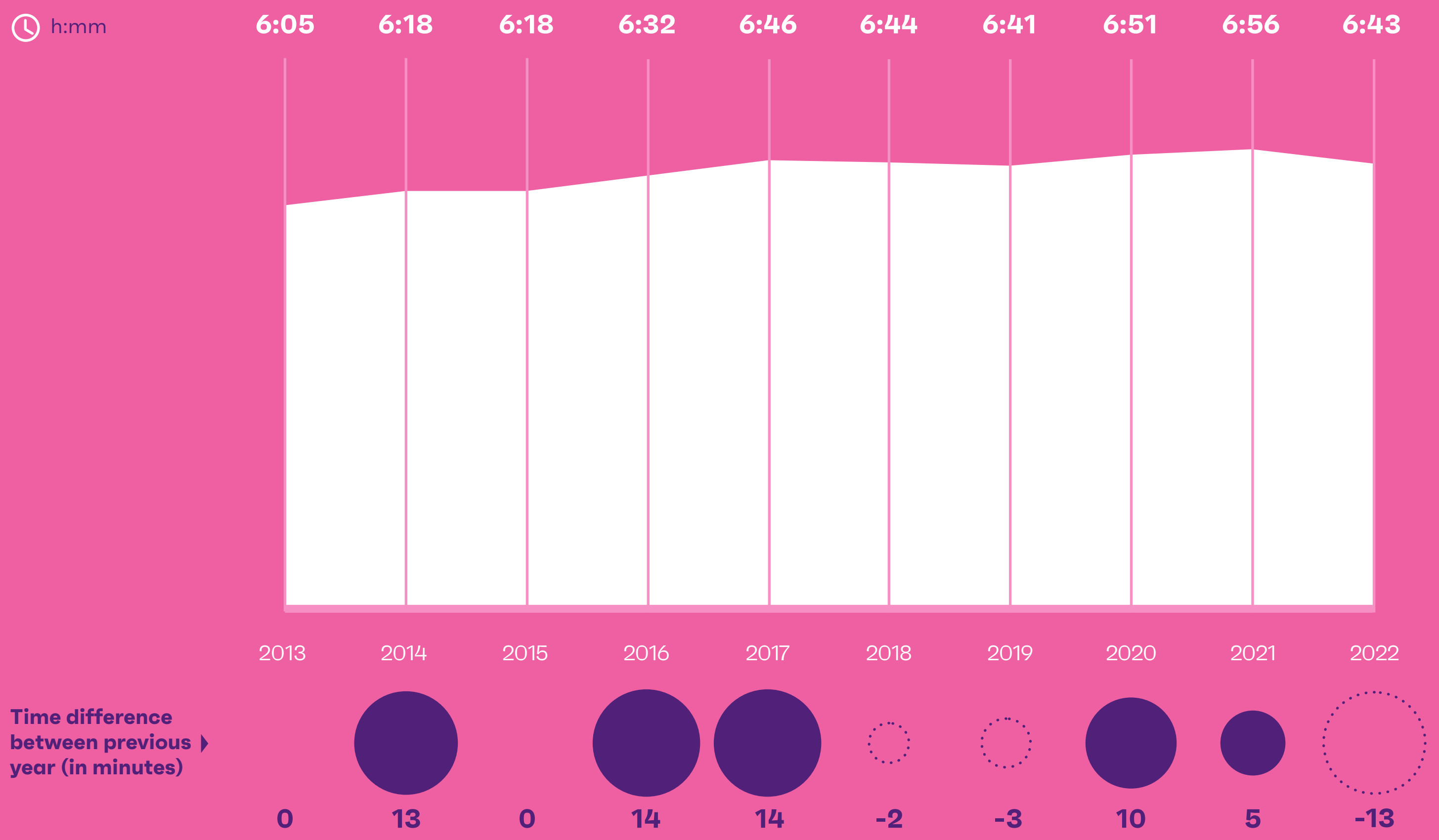
(Links on page 10)

GWI Core Q2 2022 244,231 internet users aged 16-64

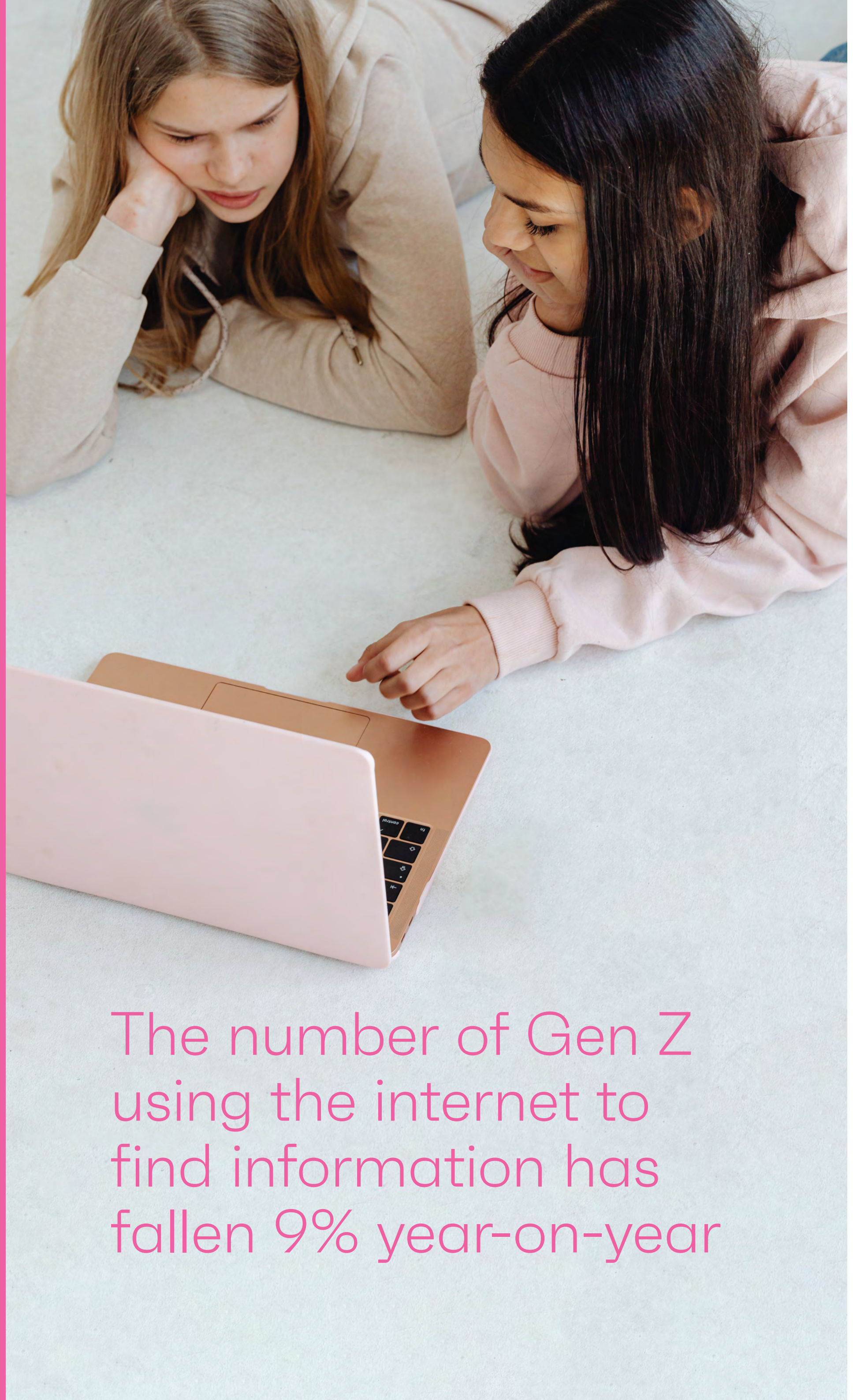
Online time has hit a ceiling

6

Average daily time spent online (h:mm)



GWI Core 2013-2022 (averages of all waves conducted each year between Q1 2013-Q2 2022) 2,595,435 internet users aged 16-64



The number of Gen Z using the internet to find information has fallen 9% year-on-year

The internet saturation point

Despite consumers spending almost 7 hours (6 hours, 43 minutes) a day online using a mobile, PC, laptop, or tablet, these figures have actually hit a ceiling. This is the case even in internet growth markets like the Middle East & Africa and Latin America, where average daily time spent online has fallen by 20 minutes and 34 minutes respectively since 2021.

We look into this trend in more detail in our annual trends report, **Connecting the Dots**, but it's worth noting the impact this could have on different forms of media.

Though notable drops in time spent online illustrate a decrease in pace, reflecting the post-pandemic landscape and how people now have less time to spare; a combination of media fatigue, subscription churn, and the cost of living crisis play an equally important role in flattening the curve.

02

TV/video

Streaming's stable growth

Even though linear TV still leads in many regions, the growth of online TV is quickly eating into broadcast's share of TV time. Since 2018, global daily time spent watching streaming services has increased by 21 minutes. Despite a notable uptick across all markets, MEA has seen the largest spike, with daily streaming increasing by 40 minutes since 2018. Earlier this year the region saw several streaming developments, most notably the **arrival** of Disney+, as well as several more localized launches including TOD (with expansive sports content) and **Vidio**.

Streaming has also achieved significant growth in North America since 2018, increasing by 33 minutes while linear activity has seen no change. That's also the case in Latin America, where streaming has increased by 33 minutes per day.

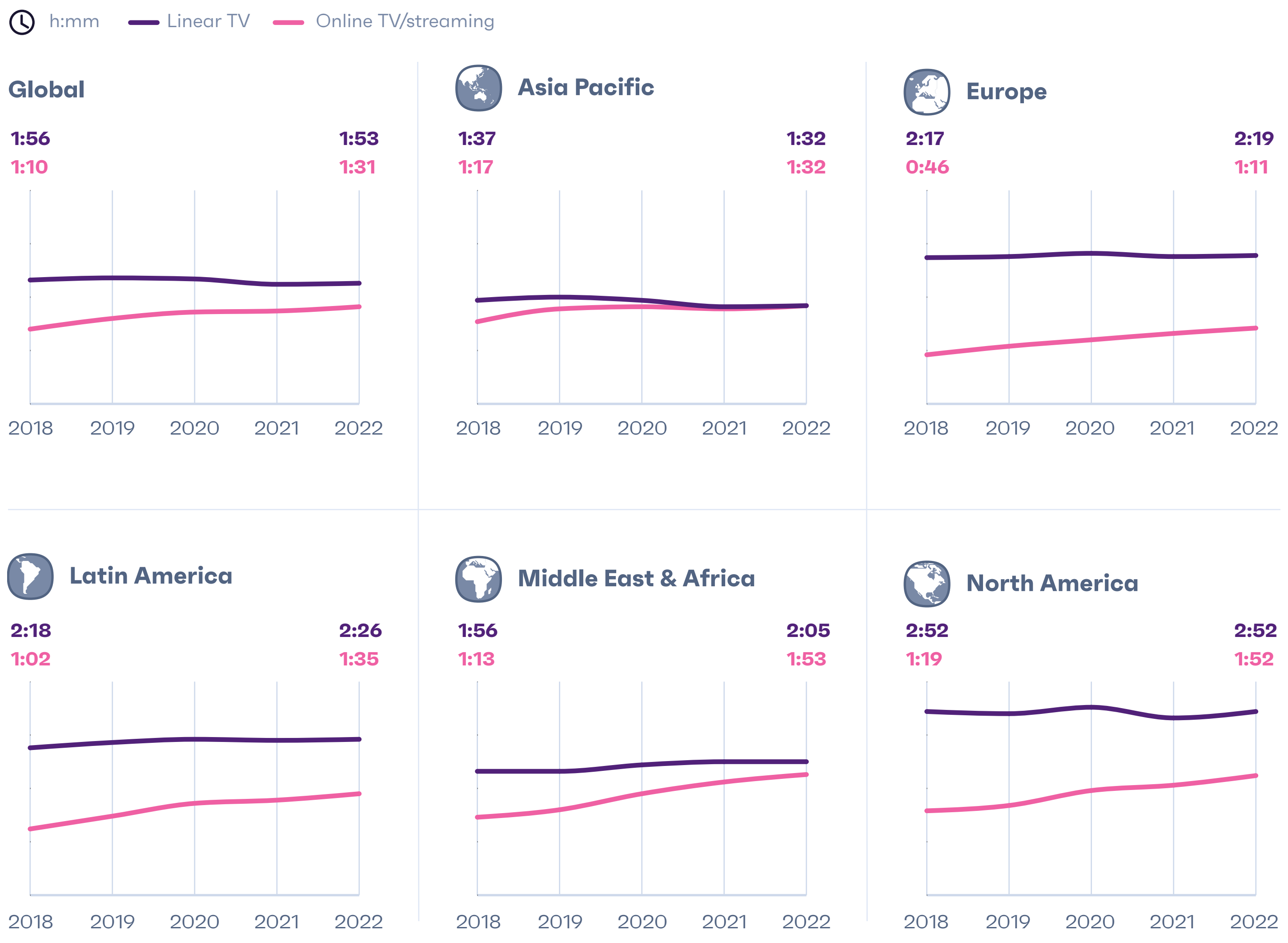
In terms of streaming platforms, Netflix remains on top across all regions, with the highest market share in Latin America (79%) and North America (65%). This comes after a year of ups and downs for the platform - from losing **1.2m subscribers** in April, to gaining **2.4m new subscribers** in Q3 2022.

In APAC, time spent watching online TV/ streaming has caught up to broadcast TV

7

Streaming vs linear

Average daily time spent on the following (h:mm)

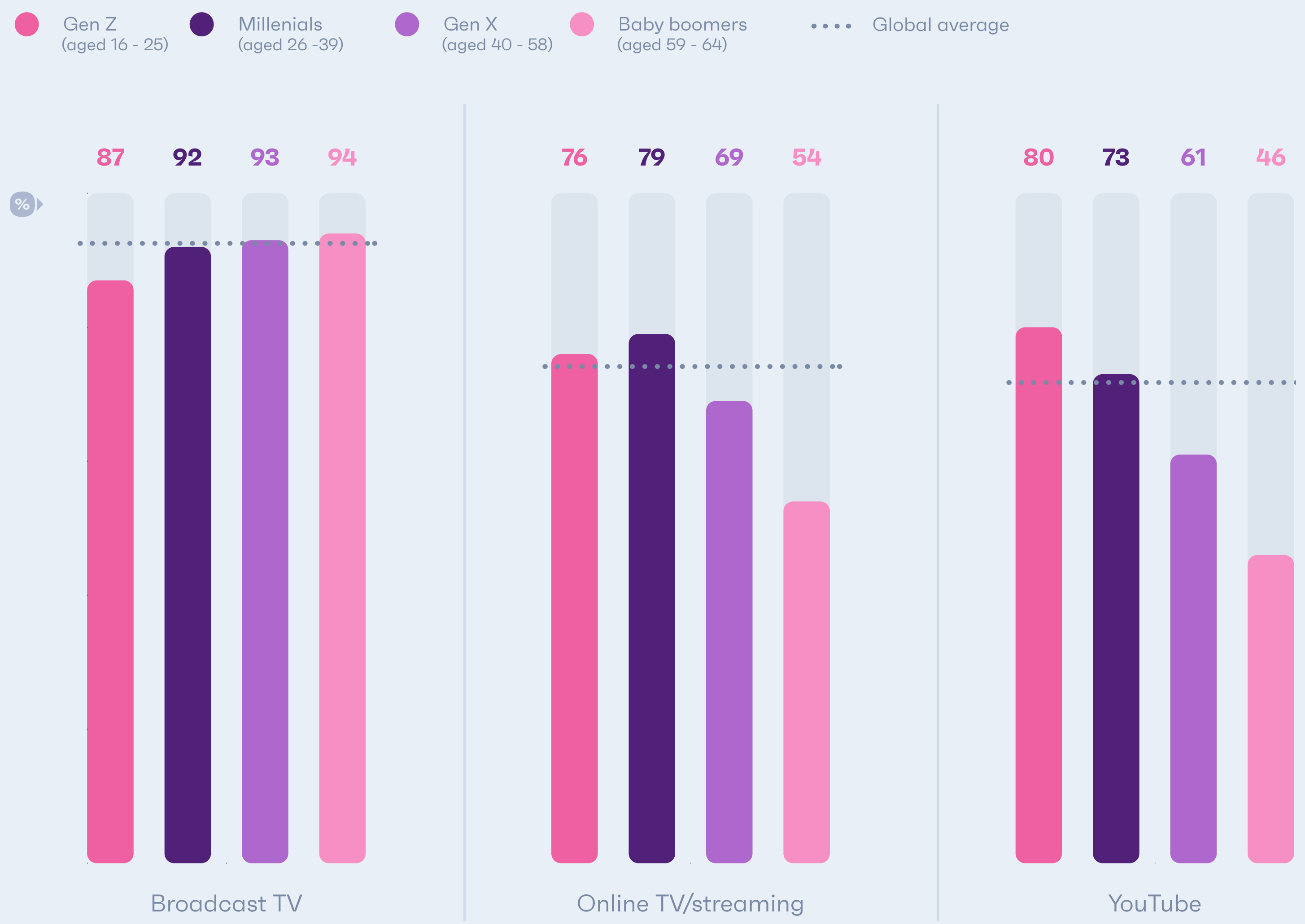


GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)

2,291,933 internet users aged 16-64

YouTube is the new media norm for young consumers

% in each generation who watch the following



GWI Core Q2 2022 | 152,746 internet users outside China aged 16-64

Outside of China, the number of consumers using TikTok has grown 40% since Q4 2020

TV behaviors

The saturated and ever-changing media landscape has made it harder to capture and maintain consumers' attention. Brands are now faced with the challenge of keeping consumers entertained so they come back for more – and they're competing with all other forms of media to do this.

Our data shows that while consumers favor live TV (91%) and streaming and subscription services (73%), these formats aren't completely clear of competition, with video/social platforms like Twitch and YouTube gaining traction, especially among younger generations. This doesn't mean traditional viewing habits are out, but that different viewing formats need to work together – and complement each other.

A great example of this in action was the 2021 Netflix series Arcane **debuting** across Netflix and Twitch, to accommodate Netflix users, and those who prefer free-to-use platforms.

Given the demand for short-form content, big names such as Meta have also acknowledged its importance, **doubling down** on short-form features of their own in order to compete with the success of competitor platforms like TikTok.

What are consumers currently watching?

Streaming fared really well throughout the pandemic, and while time spent viewing streaming has risen since its covid peak, viewing broadcast hasn't maintained the same momentum. It's an interesting trend, as not only have consumers viewing habits changed, so have the popular genres in different regions.

Since Q2 2021, the biggest changes in TV genre interest have been in children's TV (+18%) and reality TV (+8%), while films/movies (-6%) and sports (-7%) haven't fared so well.

For the Americas, there has been a huge upturn in viewing of game/quiz shows, increasing 25% in North America and 26% in Latin America. In Europe, horror shows (+7%) and dramas (+10%) are on trend, while in the Middle East and Africa, watching educational content has grown (+14%), while entertainment is falling (-11%).

Such changes year-on-year reflect the dynamism of the landscape. There are new audiences rapidly emerging as TV media becomes more accessible through competing web services and TV offerings - Disney+ is a great example. In the 28 markets we track, the number of users has doubled in the last year, with exclusive offerings driving new waves of interest.

YouTube has a strong presence across markets, while entertainment, film, and news top the list across ages by genre

Most popular video services

9

% in each region who use the following services

Asia Pacific	YouTube 76	NETFLIX 47	Disney+ 34	prime video 28	Premium 19
Europe	YouTube 60	NETFLIX 47	prime video 24	Disney+ 13	Premium 9
LatAm	NETFLIX 79	YouTube 76	prime video 43	Disney+ 41	HBO max 30
MEA	YouTube 79	NETFLIX 51	شاهد 25	Premium 15	prime video 15
NorthAm	NETFLIX 65	YouTube 53	prime video 43	hulu 40	Disney+ 38

GWI Core Q2 2022 170,078 internet users aged 16-64

Most popular TV genres

10

% in each age group who watch the following in a typical week

Key: Entertainment/variety; Films/movies; News/current affairs; Documentaries/factual; Reality; Comedy

	16–24	25–34	35–44	45–55	55–64
1	Entertainment/variety 54	News/current affairs 60	News/current affairs 63	News/current affairs 65	News/current affairs 67
2	Films/movies 54	Entertainment/variety 60	Entertainment/variety 58	Films/movies 57	Films/movies 58
3	News/current affairs 51	Films/movies 54	Films/movies 56	Entertainment/variety 55	Entertainment/variety 53
4	Comedy 49	Comedy 48	Reality 45	Reality 42	Documentaries/factual 44
5	Reality 46	Reality 48	Comedy 45	Comedy 41	Reality 40

GWI Core Q2 2022 170,078 internet users aged 16-64

Streaming in the background

Second-screening activities

11

% of second screeners in each generation who do the following when watching TV

%	Gen Z	Millennials	Gen X	Baby boomers
Chat to/message friends	69	66	58	50
Use social media	56	58	53	46
Read my emails	32	38	44	52
Read the news	32	42	43	42
Play games	44	41	33	30
Search for products to buy	35	41	39	33
Search for information related to what I'm watching	33	35	33	30
Share my opinion of a TV show	19	23	17	11
Interact with the online content of the TV show	18	21	15	10

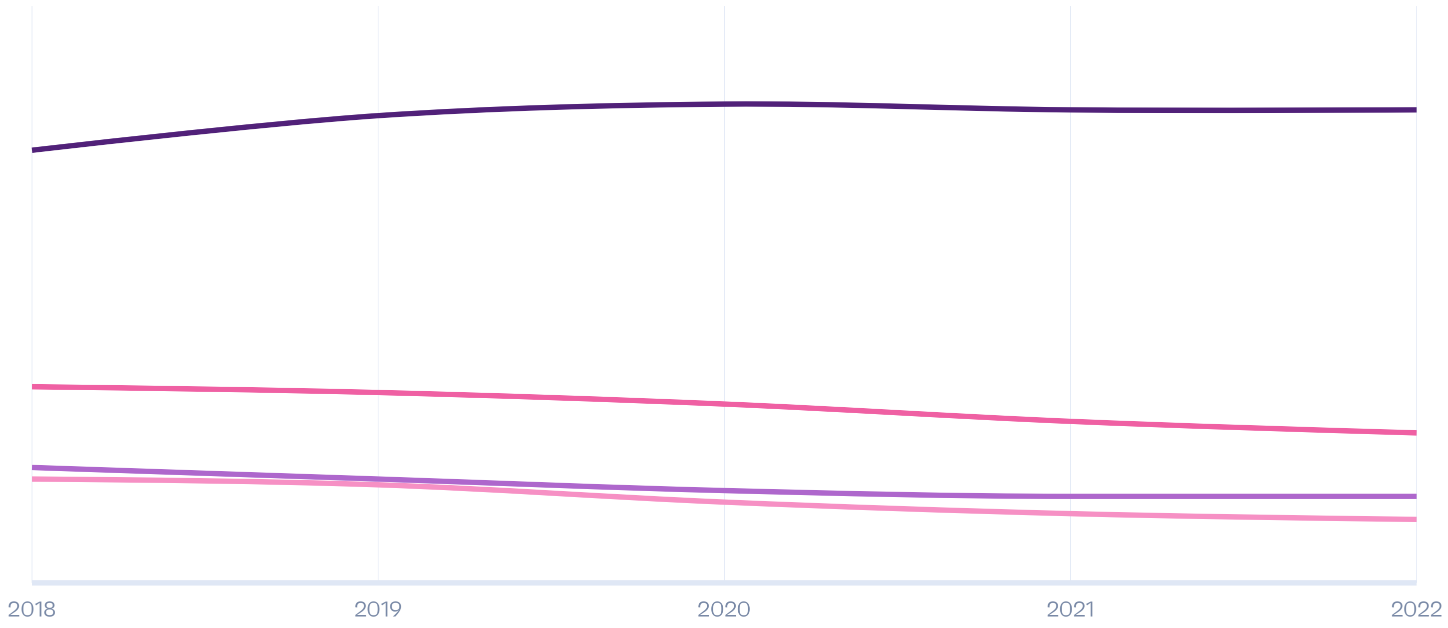
GWI Core Q2 2022
151,715 second screeners aged 16-64

Second-screening: devices over time

12

% who use the following devices when watching TV

%	2018	2019	2020	2021	2022
Smartphone	75	81	83	82	82
Laptop	34	33	31	28	26
Tablet	20	18	16	15	15
Desktop PC	18	17	14	12	11



GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)
3,073,732 internet users aged 16-64

The short-form phenomenon

Every social media platform has its own vibe, with unique audiences and niche features that set them apart from the next service. But now the lines are **blurring**. TikTok's success with short-form video has led other platforms to look for ways to build video features of their own.

Let's be clear, not every platform is attempting to emulate TikTok's success. In fact sometimes the direction of influence is reversed. For example, even though TikTok made its name through short-form video, it's now turning to Instagram for more ways to **bolster its offering**.

Nonetheless, TikTok is turning heads, and as more social media platforms **double down** on video features, we can use data to gauge the growth opportunity here.

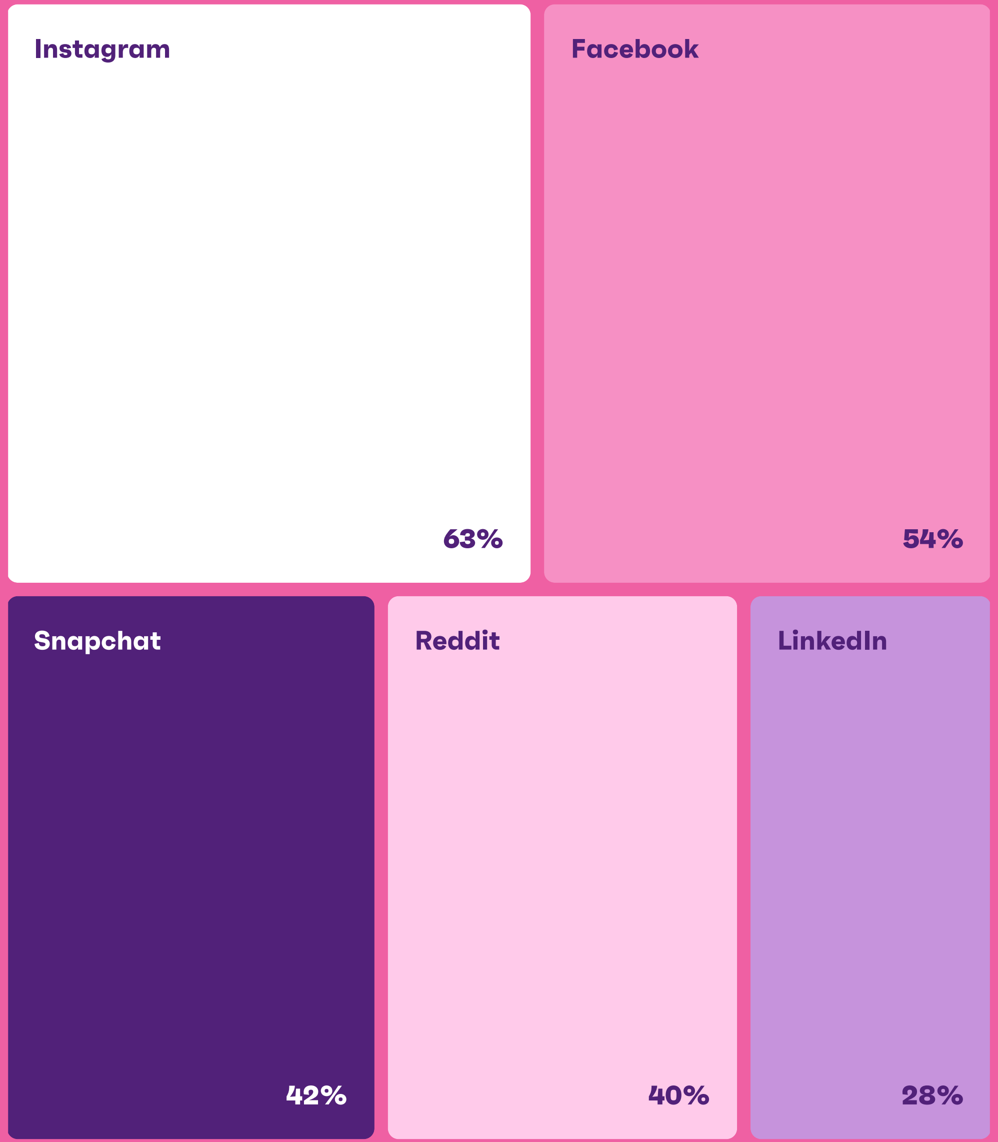
Instagram, a service known for its photo-sharing features, now sees over two-thirds of its users watching videos on the platform every month. The situation is similar for Facebook, where over half its users do the same. As these services accommodate more kinds of media, they're better placed to attract new users – or avoid losing them elsewhere.

Even a business networking service like LinkedIn (where 3 in 10 watch videos every month) has successfully integrated video into its offering without losing what makes it unique.

The number of TikTok users outside China has grown 12% since Q2 2021

Video watching on social

% of users on the following platforms who watched videos on them in the past month



GWI Core Q2 2022

Users aged 16-64:
Facebook 175,006
Instagram 147,599
Snapchat 59,006
LinkedIn 58,336
Reddit 32,114

03

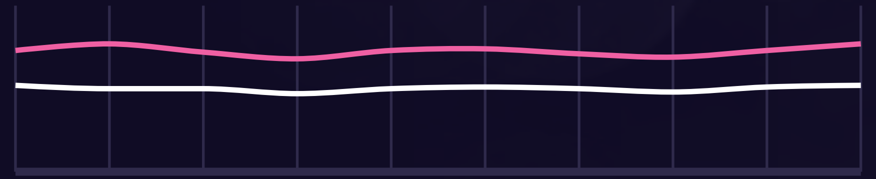
News

Online vs. offline press

Average daily time spent on the following (h:mm)

14

	Q1 2020									Q2 2022
Online press	1:13	1:17	1:12	1:08	1:13	1:14	1:11	1:09	1:13	1:17
Physical press	0:52	0:50	0:50	0:47	0:50	0:51	0:50	0:48	0:51	0:52



GWI Core Q1 2020-Q2 2022

1,407,547 internet users aged 16-64

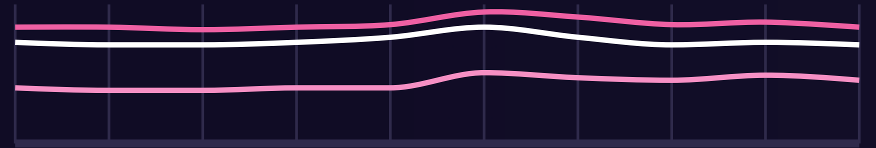
Social vs. site

% who get their news from the following sources

15

	Q1 2020									Q2 2022
Social media	46	46	45	46	47	52	50	47	48	46
News website	40	39	39	40	42	46	42	39	40	39
News app	22	21	21	22	22	28	26	25	27	25

%



GWI Core Q1 2020-Q2 2022

1,407,547 internet users aged 16-64

More consumers get their news from social media than news websites

Where consumers get their news

Accessing global news is easier than it has ever been. Consumers nowadays, can reach into their back pockets to read the daily headlines on their mobiles instead of buying the day's paper. As of Q2 2022, daily time spent reading online press beats the physical counterpart by 25 minutes. This however, doesn't mean consumers won't pick up their favorite magazine or newspaper. In fact, time spent reading physical press is the highest it has been since Q1 2020. Across all mediums, time spent reading the news is on the rise.

In Q2 2022, 58% of consumers consumed news via either social media or a news website. Social media is the dominant channel for news discovery for most consumers worldwide.

Apps like Flipboard or Apple News are falling behind though. The number of users reading news apps has increased by 52% between Q2 2018 and Q2 2022. With news consumption on the rise worldwide, consumers might be on the lookout for more diverse news stories that don't come from a single source.

Each country's top current affairs, business, and societal interests 16

- Economy/finance
- Entrepreneurship
- % diff since Q2 2020
- News/current affairs
- Environmental Issues
- Charities/volunteering
- Investments

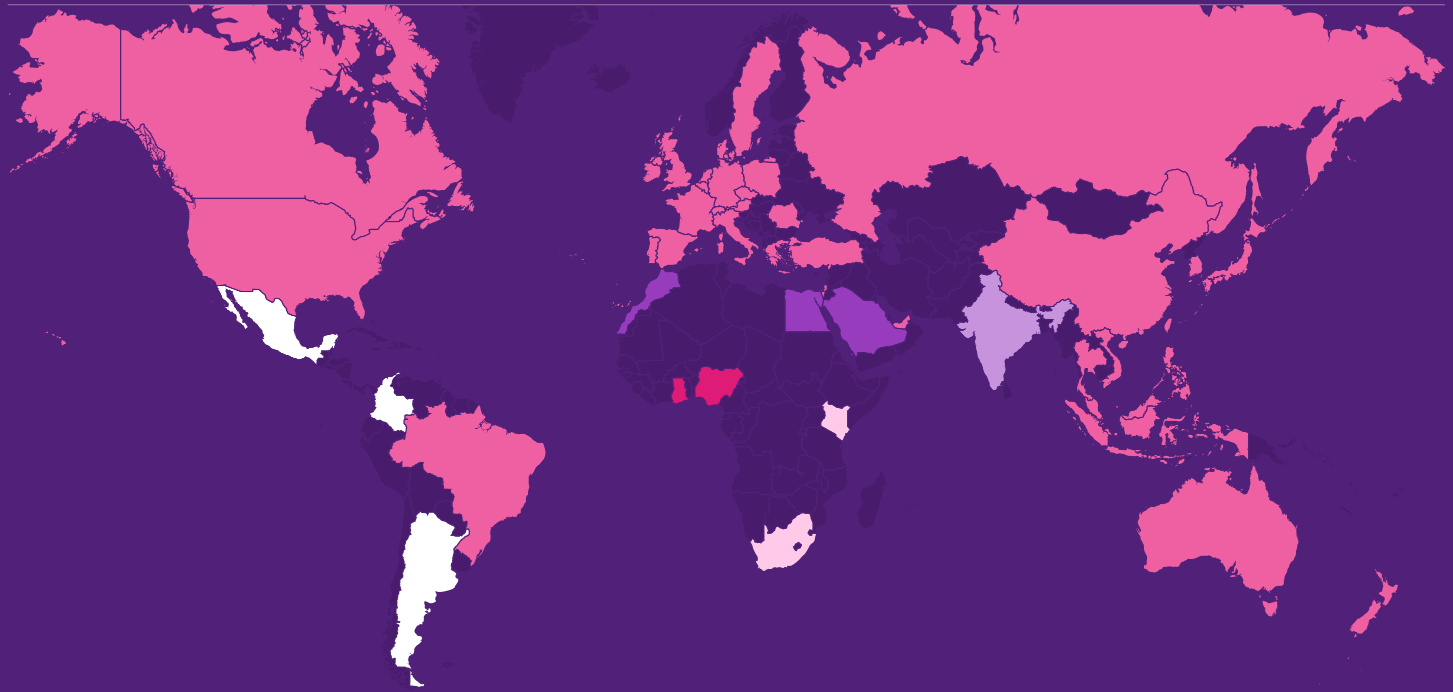
Country	%	% diff since Q2 2020
Argentina	43	-8
Australia	43	-19
Austria	50	-17
Belgium	43	-12
Brazil	53	-6
Canada	44	-13
China	33	-7
Colombia	49	3
Czech R*	50	-
Denmark	42	-12
Egypt	26	-18
France	40	-9
Germany	49	-13
Ghana	56	45
Greece**	53	-
Hong Kong	47	-14
India	41	3
Indonesia	49	-13
Ireland	49	-4
Israel	41	-22
Italy	50	-10
Japan	38	-16
Kenya	54	-7
Malaysia	43	-21
Mexico	46	-5
Morocco	18	10
Netherlands	50	-10
New Zealand	49	-18
Nigeria	55	-3
Philippines	47	-16
Poland	52	-15
Portugal	53	-8
Romania	47	-10
Russia	55	-5
Saudi Arabia	27	-23
Singapore	43	-15
South Africa	53	6
South Korea	44	-17
Spain	54	-11
Sweden	47	-12
Switzerland	47	-15
Taiwan	49	-10
Thailand	49	-14
Turkey	52	-15
UAE	36	12
UK	45	-15
USA	40	-11
Vietnam	47	-9

Keeping on top of affairs

While people are reading more news content, the number who say they are actually interested in news has fallen year-on-year in most countries. The decline could be due to the world's slow exit from the pandemic, or perhaps news fatigue has taken over as consumers grow tired of reading negative headlines - or simply reading news altogether.

When asked which sector of business, social interest, or current affairs our users are more interested in, consumers in just 12 countries were interested in something else other than news/current affairs. LatAm and MEA countries like Argentina, Colombia, Ghana, Kenya, and South Africa were the outliers in finding business topics like investment, entrepreneurship, and economy/finance most interesting.

Interest in news/current affairs is ahead of current affairs, business and politics/social issues in most countries



GWI Core Q2 2020 & Q2 2022 423,450 internet users aged 16-64 *Czech Republic added Q1 2022 **Greece added Q4 2020

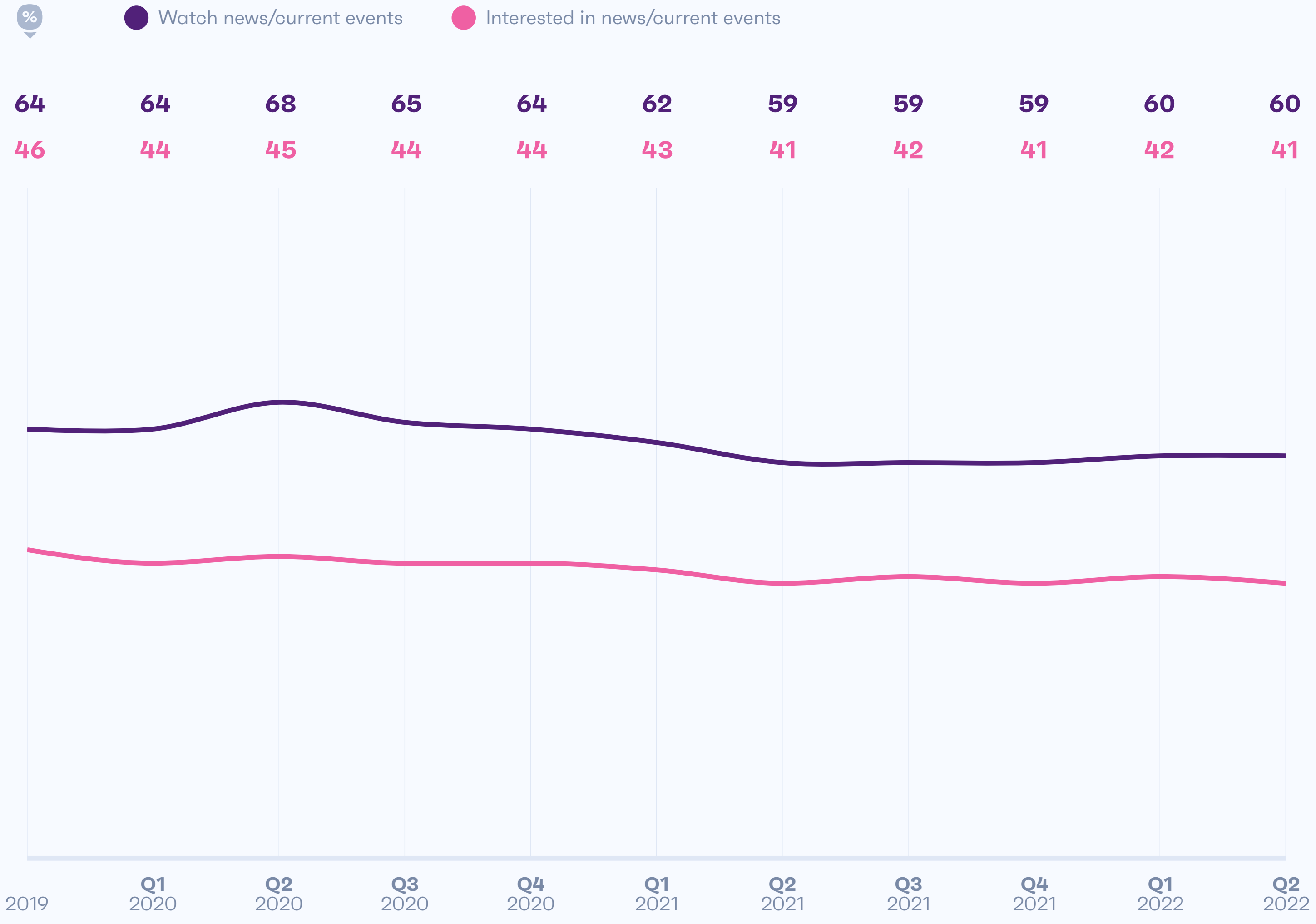
Perception of the news

Interest in the news is ticking downward. It's tricky to identify a single root cause, but our data points to misinformation and overexposure, with the perception of the news worse than in previous years. According to our September 2022 Zeitgeist, when thinking about this time last year, 13% of internet users said they trusted the news. Thinking about trust in the media today, the number who say they do has fallen by 14%.

17

The post-pandemic news decline

% who are interested in news/current events and who watch news/current events



GWI Core Q1 2019-Q2 2022 2,599,159 internet users aged 16-64

> Of 3,800 reporters surveyed, 32% said maintaining credibility as a trusted news source and combatting accusations of fake news was their biggest challenge

BARNEY BARRON
Senior Director Global Insights at Cision, EMEA

There are some generational attitudes at play here; boomers are the most skeptical of what's said on the news while millennials are the most trusting. The main issue appears to be social media however. 45% of Americans say they have no trust in social media companies – that's more than for any other institution, and up 8% on figures in Q2 2020. Given most news consumption comes from social media, it's possible that trust in the news shares a relationship with attitudes towards social media companies on the whole.

News coverage over the past two years has focused heavily on social justice issues and political discourse. It's easy to see why consumers may be tired of this, but it's really something that varies by age. Contrary to what you might think, in 11 markets outside of China, 46% of millennials say they're tired of hearing about social causes all the time - the largest of any generation. They're even 13% more likely to think this than Gen X or Boomers, who show the lowest signs of social justice fatigue.

Could this change the narrative that boomers are the least woke of all generations?

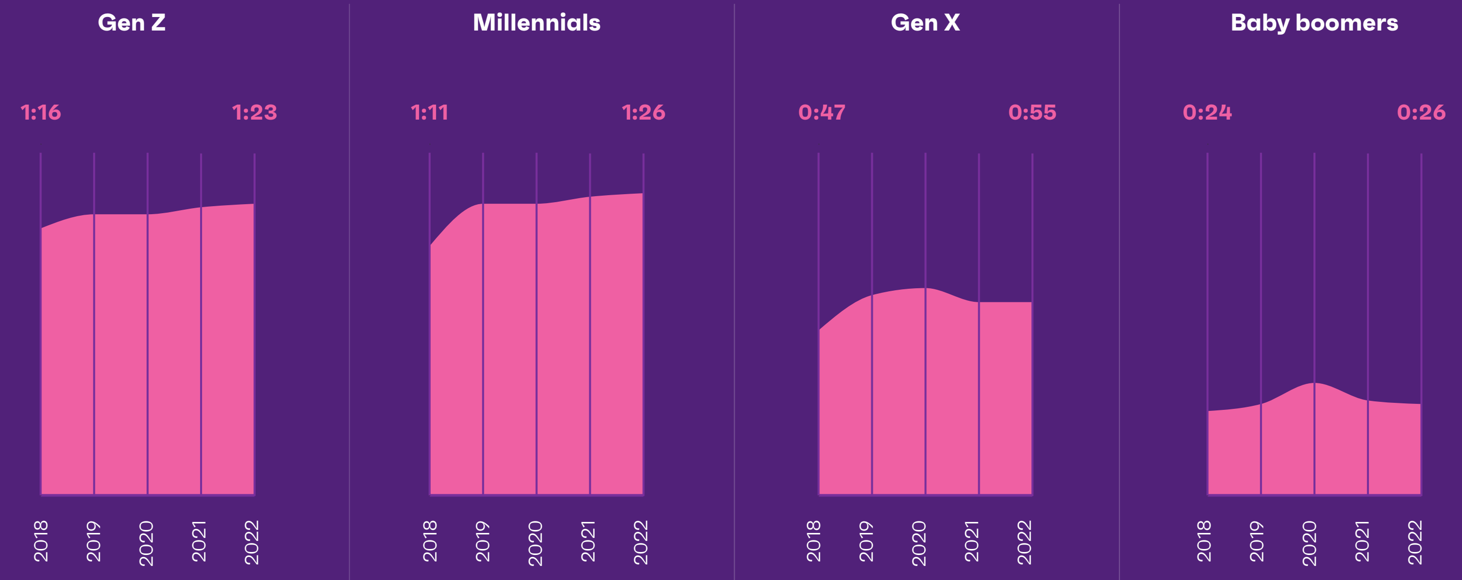
04

Gaming

For Gen Z & millennials, daily time spent on games consoles has passed its pandemic peak

18

Average daily time spent on games consoles by generation (h:mm)

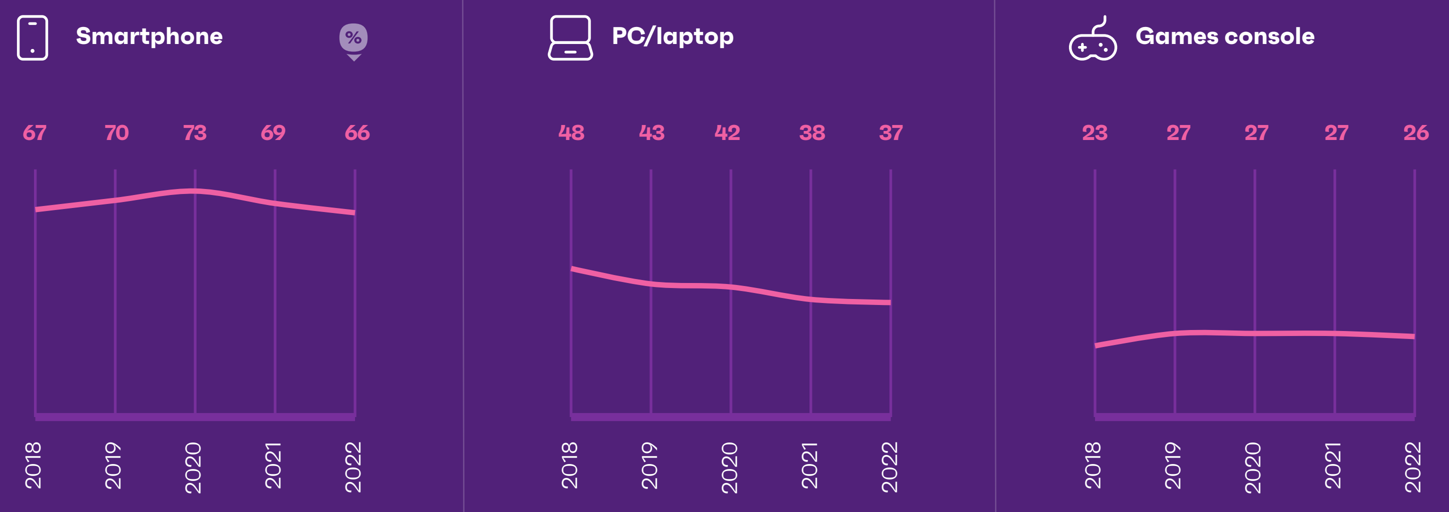


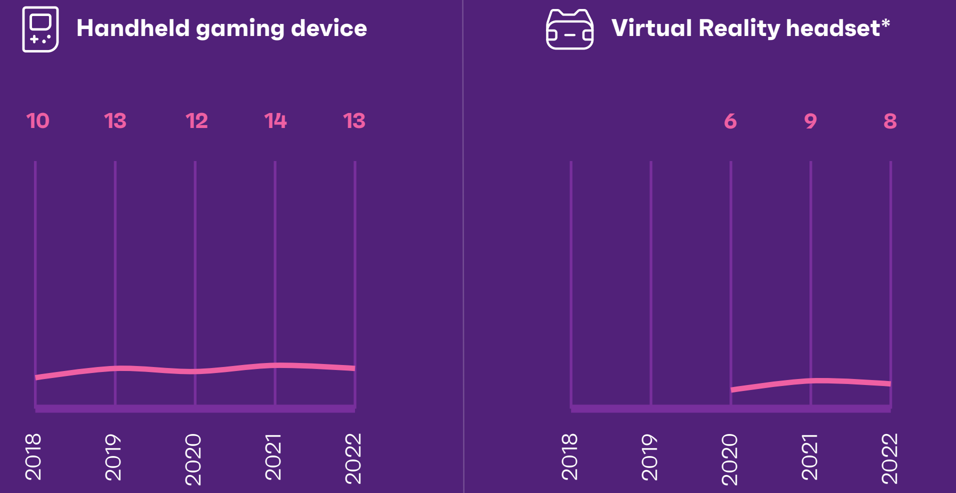
GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022) 2,291,933 internet users aged 16-64

Gaming on major devices has fallen

19

% who use the following devices for gaming





*added Q2 2020

GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)

2,291,933 internet users aged 16-64

The gaming state of play

Gaming boomed during the pandemic, so how popular is it in today's media landscape?

We often associate gaming with younger consumers, but between 2018 and 2020 Gen X's console time went up by 12 minutes a day, and even boomers added an extra 8 minutes a day. If we fast-forward to 2022, things have changed again; older consumers are now easing back on console use, while Gen Z and millennials are spending more time gaming than they were during the pandemic.

What this shows is the increased opportunities for entertainment that consoles provide, something reflected in the next-gen consoles recently released by Sony and Microsoft. At the same time we need to treat this insight with slight caution, as it doesn't tell us whether the increase is in time spent gaming or using the console as a multimedia platform.

Nor does it tell us if their attention is actually being taken away from other gaming devices.

In 2020, 73% of consumers were using a smartphone to play games - hardly surprising given mass mobile ownership. Today however, the figure has fallen to 66%, a 10% decline in only two years. It was widely expected that smartphones would lead to a boom in gaming with the likes of **Asus and Xiaomi** releasing specialist gaming phones to market - but this dynamic seems to be losing some steam.

In the last year, there's been a decline in the number of smartphone gamers who watch live-streams on their mobiles, as well as declines in the number who say they're interested in gaming, esports, or technology. This is against a slight uptick in the number who have actually purchased a mobile game in the last month, although that only makes up 16% of smartphone gamers.

Gen Z/ millennials are spending more time on their consoles post-pandemic

Gaming has changed, find out how

Download report

Console gamers prefer to watch on-demand/streaming services...

% of console gamers in each region who use the following

%	APAC	Europe	LatAm	MEA	NorthAm
A game console to watch Live TV/TV channels	22	12	14	16	17
A game console to watch on- demand TV/streaming services	21	14	20	16	20

...but TV viewing is a younger console gamers trend

% of console gamers in each generation who use the following

	Gen Z	Millennials	Gen X	Baby boomers
A game console to watch Live TV/TV channels	19	20	14	12
A game console to watch on-demand TV/streaming services	20	22	15	10

GWI Core Q2 2022 29,209 console gamers aged 16-64

Consoles are users' media hub

Games consoles are for far more than just gaming, acting as a media hub for music or TV/film streaming. They're becoming a one-stop entertainment shop, which begins to explain why the number of people gaming on consoles hasn't increased, but time spent on them has.

For example, 18% use their console to watch live TV or TV channels, and 19% use them to watch on-demand or streaming services. The number of users watching live TV on their consoles has increased 15% since Q2 2021, with the biggest rises among millennials, and consumers in MEA and Latin America.

But it's not just the number who watch TV on these devices that's growing; it's how long they spend using them too.

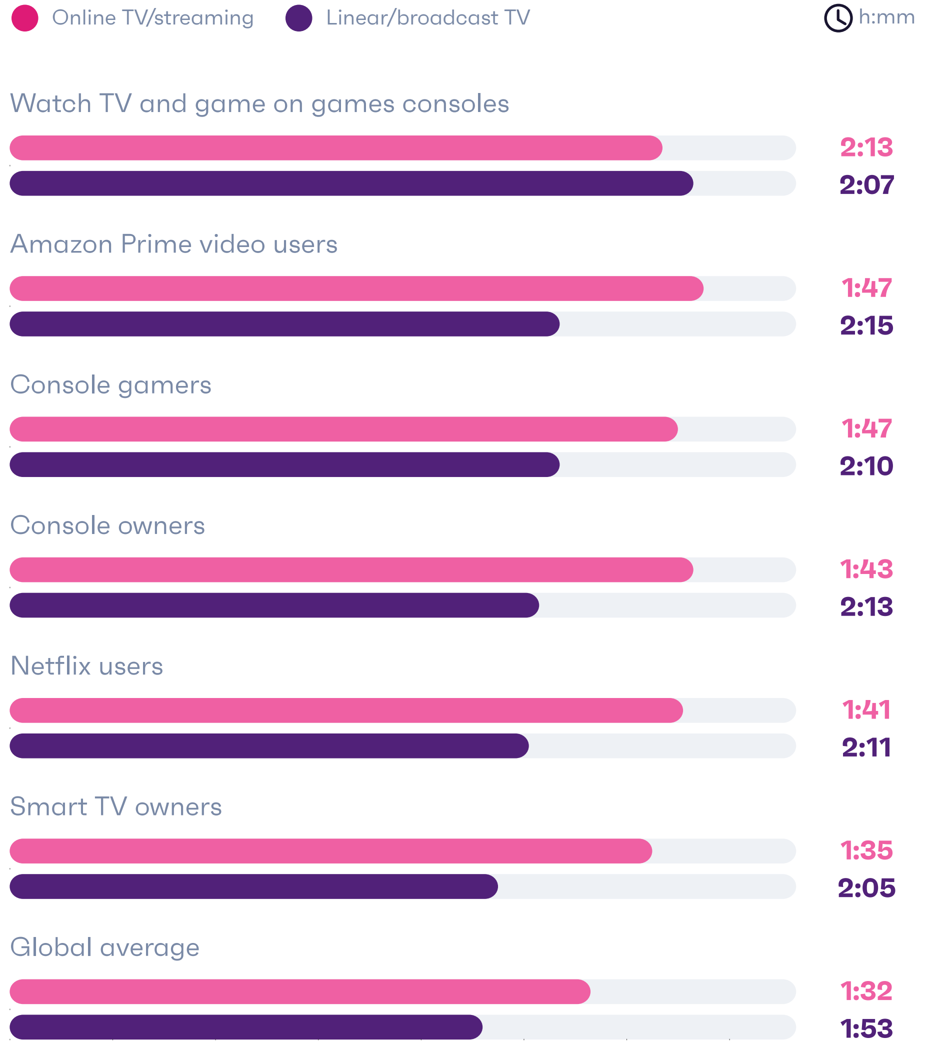
Compared to the average consumer, console gamers spend an extra 17 minutes watching broadcast TV, and extra 15 minutes watching online TV, per day. This rises dramatically for those who both game and watch TV on their games consoles (+41 minutes). It's a huge figure, and one that should catch the attention of brands and media companies alike.

Games consoles allow users to follow all their media interests using one convenient device. More gamers are watching TV on their consoles than ever before, and their standout interest in TV genres like anime means there's a growing audience to entertain.

Live TV viewing on games consoles grew 15% since Q2 2021

Streaming on consoles among console gamers is a heavy interest

Average daily time spent watching TV, by consumer group (h:mm)



GWI Core Q2 2022 170,078 internet users aged 16-64

The battle for gamers' attention

Esports are typically preferred by younger audiences, with nearly half of Gen Z and millennial gamers saying they're very or extremely interested. For brands, understanding esports fans' behaviors will likely give them a better understanding of how they consume other media.

Gen Z are more likely to engage with esports on social media, while millennials are more likely to buy content. For brands that means approaching both groups differently, but always keeping digital content front of mind. Social media has a growing influence for both generations, especially video platforms and community-oriented messaging services.

Discord, Snapchat, Twitch, and Reddit all stand out among these esports fans as their preferred social platforms. In fact, they actually spend more time on social media than the average gamer, with those who get their gaming information from social platforms also more likely to use them to watch live streams. It's where a lot of the battle is happening right now for media brands and social media companies - enticing viewers and creators to their platforms while creating new audiences for advertisers. But where **Twitch and YouTube** - and sometimes **Facebook** - have often taken the lead on such offerings, there's a new player in the game: TikTok.

We saw TikTok introduce **LIVE Subscription** earlier this year, a monthly fee enabling users to show support for their favorite live creators, with their **TikTok made me play it** global gaming event, one of their first major gaming endeavors. TikTok is matching content creators with viewers in new spaces, attracting gamers' attention when away from their consoles.

For video game fans who like esports, their main fandom appeal is being part of a community with a common interest. Platforms and brands that can foster this relationship between the content creators and users to create a sense of community, will be able to stay front of mind with gaming and esports fans alike.

Discord is the standout social media app for esports fans

22

% of esports fans who use the following social media platforms for information and content, sorted by top over-index

GWI Gaming Q2 2022

4,395 esports fans who find gaming information/content on social media in 17 markets aged 16-64

05

Music/audio

The state of streaming and radio

According to Bloomberg, recorded music earnings surpassed $25 billion last year for the first time. As listening to music becomes more accessible, revenue from recorded music won't be declining anytime soon, but that doesn't mean radio's days are numbered.

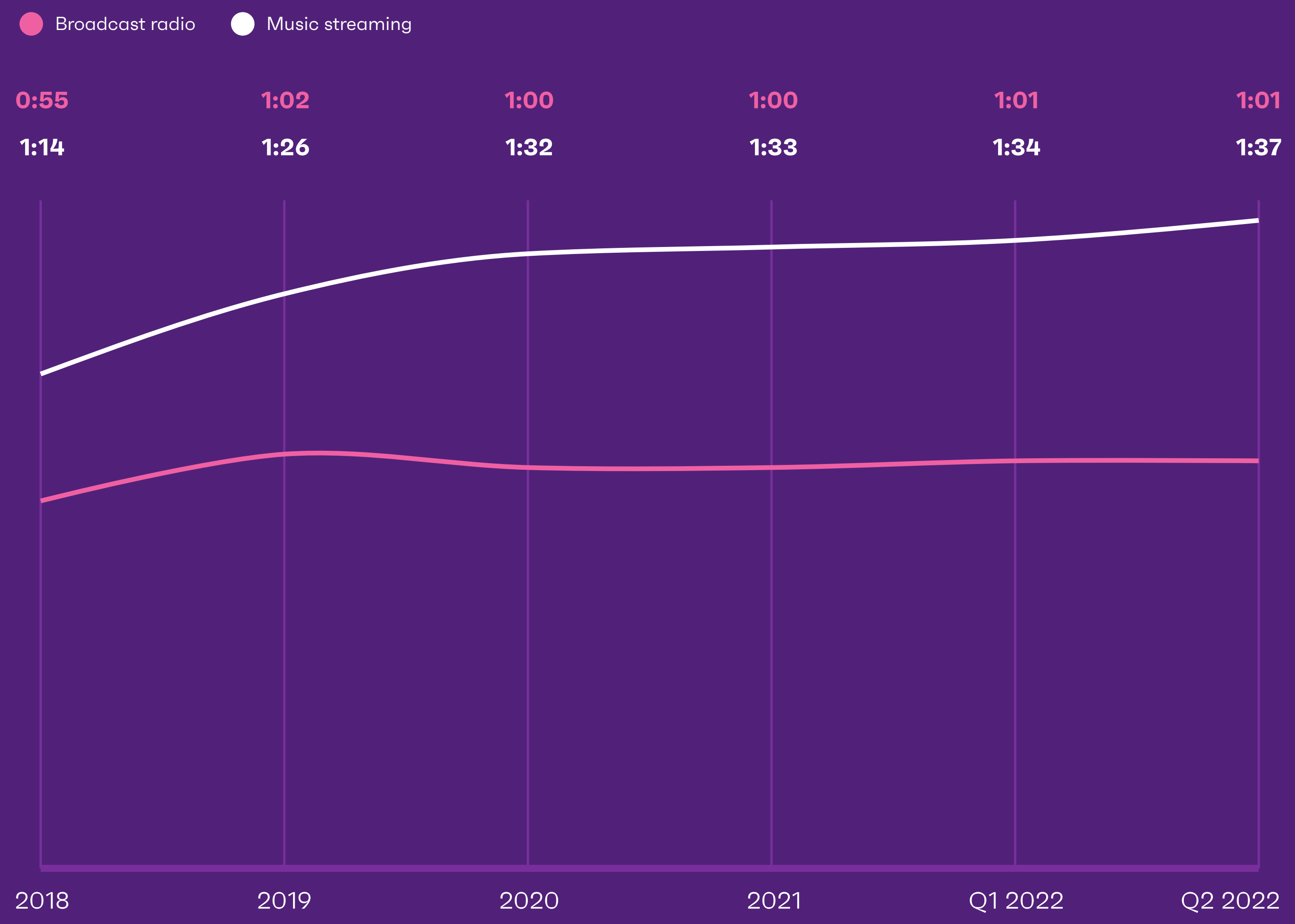
Time spent listening to the radio has held steady in the past few years. Radio's ability to adapt to new technology by adding streaming options and allowing phone and tablet users to listen via their devices has helped maintain its century-long popularity into the modern day. But the appeal of streaming may have to do with the freedom to control the music – and the lack of ads. In Q2 2022, 48% of internet users say they typically prefer to be in control of the music they listen to, while 38% say they're bothered by audio ads and avoid them when they can.

Gen Z stream music for nearly 2 hours every day

23

Time spent on radio vs. streaming

Average daily time spent listening to the following (h:mm)



GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)
2,291,933 internet users aged 16-64

Music streaming services

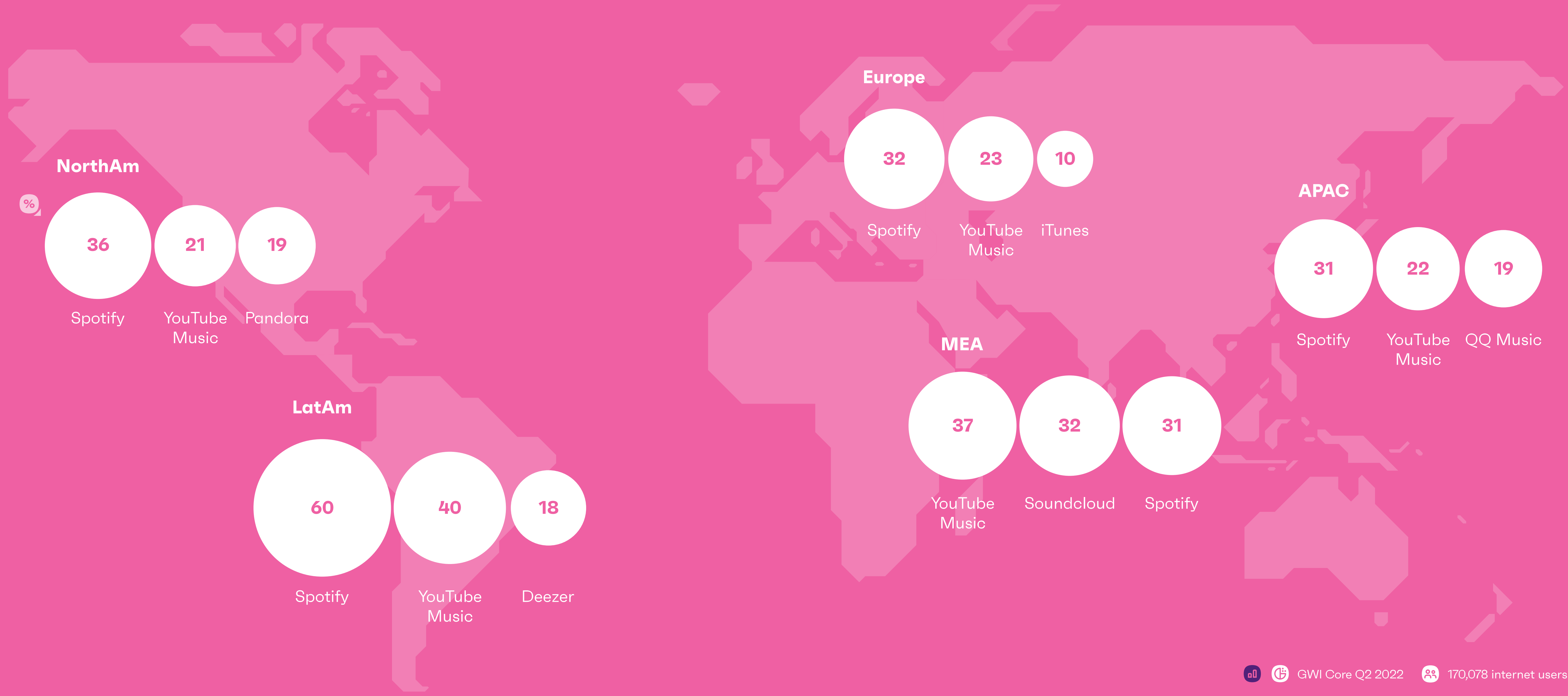
Spotify has entered the audiobook world. The music streaming giant offers music, comedy shows, podcasts, and numerous other forms of spoken entertainment. Now they've added audiobooks to the list – effectively accommodating all forms of audio on one platform. With 44% of consumers using the platform every month and 195 million paid subscribers, Spotify is the world's top streaming service, way ahead of its competitors.

Outside of China, YouTube Music is quickly making an impression on older generations, with just a one percentage point difference between Spotify and YouTube Music among baby boomers. Meanwhile, Apple Music has stayed relatively steady despite a slight dip in Q2 and Q3 2020, while Soundcloud has found success in the MEA.

Spotify is the top service for listening to or downloading music, radio and audiobook content

Top 3 music services by region

% who've used the following music services in the past month



GWI Core Q2 2022 | 170,078 internet users aged 16-64

People trust their own taste in music

Playlists are still the preferred way for consumers to listen to music, but close behind are playlists created by the platform they're using. When you take a look at platform-curated playlists, many of those are less about genre and more about the desired mood. Some of Spotify's popular curated playlists are titled, "Confidence Boost," "scarf season," "Sad Hour," and "Feelin' Myself." **Mood-based music** is becoming more popular as genres are becoming harder to define. Why look through Spotify's 5,071 subgenres when you can set the vibe with a perfectly curated playlist?

When given the option of genre, most audiences stick to a specific generation. Excluding 16-24s, every age group stuck to 80s or 90s music. Hip-hop/rap was most preferred by 16-24s, most likely due to the fact they don't have a certain period of music to look back on from their younger years, except 00s music. Five of the top ten most-streamed artists on Spotify all fall under the hip-hop/rap category.

Brands have taken note of what young people are listening to and are now eyeing up the power of celebrity advertising. McDonalds has most recently gained even more exposure with their **celebrity meals** that include Saweetie, BTS, J Balvin, and Travis Scott. The likes of McDonalds, Taco Bell, KFC, and Sprite **have all teamed up with artists** to appeal to young people and gain free promotion.

Coming close to entering the top five for 16-24s is K-pop. With a dedicated fan base, K-pop has been gaining popularity for years now – potentially because of the genre's focus on **self-love and social issues**. In fact, it's become such a global phenomenon that a new **Exchange Traded Fund** has been created so US investors can back companies tied to bands like BTS and BlackPink. This shows how the genre is breaking cultural barriers and extending beyond South Korea.

Top 5 music genres

% in each age group who like listening the following

16-24s		25-34s		35-44s		45-54s		55-64s	
Hip-Hop/Rap	31	90s music	36	90s music	41	80s music	47	80s music	51
90s music	29	Rock	30	80s music	34	90s music	45	50s/60s/70s music	41
Rock	27	Hip-Hop/Rap	26	Rock	31	Rock	33	90s music	39
Pop/Top 40	23	Pop/Top 40	25	Pop/Top 40	26	Pop/Top 40	26	Rock	34
00s music	23	80s music	24	00s music	24	50s, 60s, 70s music	26	Pop/Top 40	23

Preferred audio content

% in each age group who most like to listen to the following

16-24s		25-34s		35-44s		45-54s		55-64s	
My own playlists	52	My own playlists	48	My own playlists	47	My own playlists	47	My own playlists	42
Platform playlists	31	Platform playlists	29	Platform playlists	27	Radio shows	28	Radio shows	30
Top of the charts	25	Top of the charts	27	Top of the charts	27	Top of the charts	23	CD/vinyl	25
Remixes/covers	23	Podcasts	22	Radio shows	25	Platform playlists	23	Top of the charts	21
Podcasts	23	Radio shows	22	Podcasts	20	CD/vinyl	20	Platform playlists	19

GWI Core Q2 2022 170,078 internet users aged 16-64

Comedy is the most popular genre for younger generations in both podcasts and TV/film

Podcasts are here to stay

A report by the **Interactive Advertising Bureau** projected the podcasting industry will make $4 billion annually by 2024. This is a huge leap from the **headlines** in 2021 stating podcasting hit the $1 billion mark. Much of this growth comes from increased time listening to podcasts as well as advances in ad technology so advertisers can better target audiences.

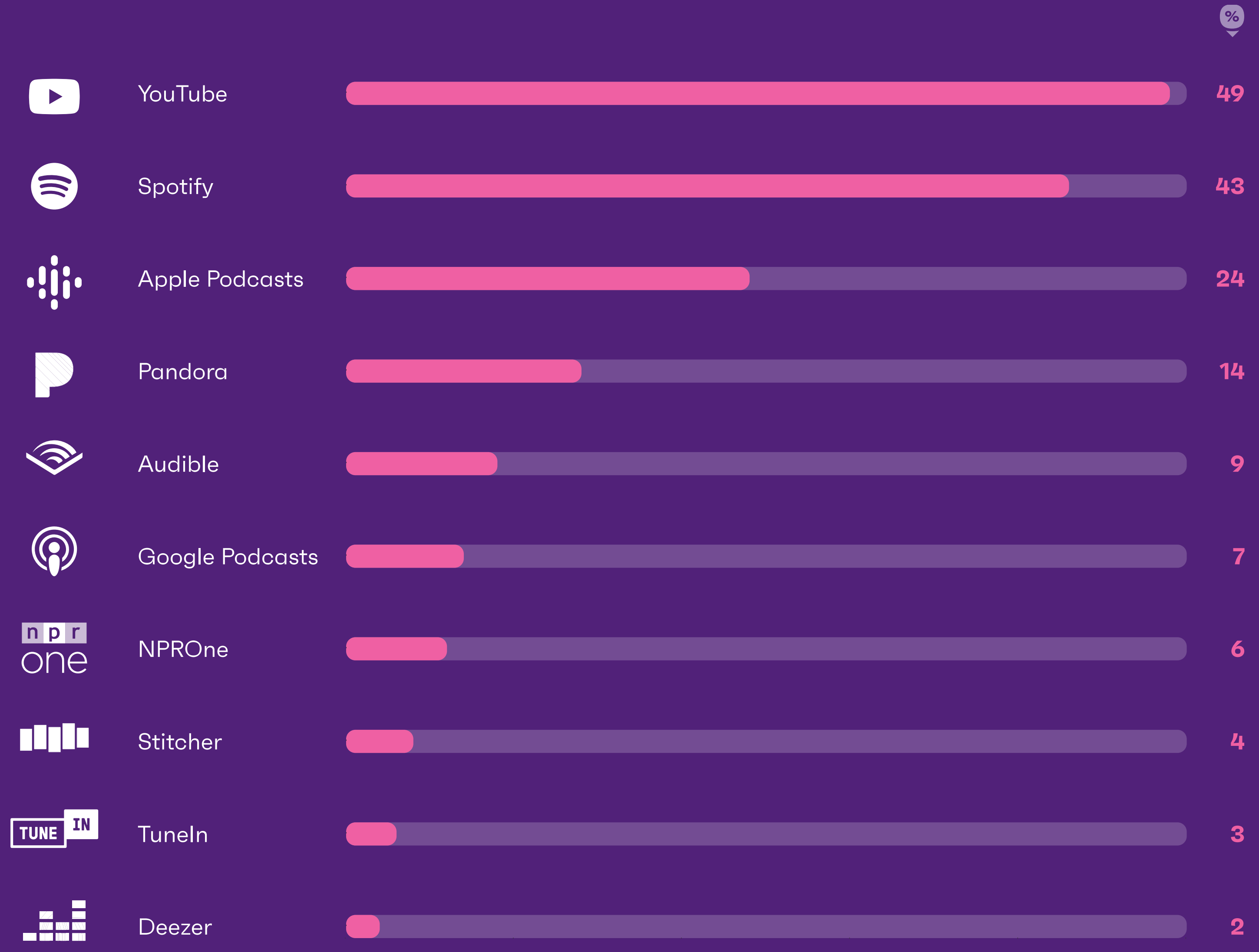
In Q1 2022 podcasts moved into the top 3 preferred types of music and audio content, replacing CDs and vinyls. In the US, YouTube is the preferred way consumers listen to podcasts with Spotify close behind. When split by age groups, 67% of 16-24s prefer listening to podcasts on Spotify, and over 53% say YouTube – despite the video sharing platform's popularity among younger generations.

Many turn to podcasts for a mood booster, with comedy being the most popular genre among 16-24s, 25-34s, and 34-44s. True crime has also gained traction as the second most popular genre among all three age groups, while older generations lean more toward

Leading podcast platforms in the US

26

% of US podcast listeners who use the following platforms

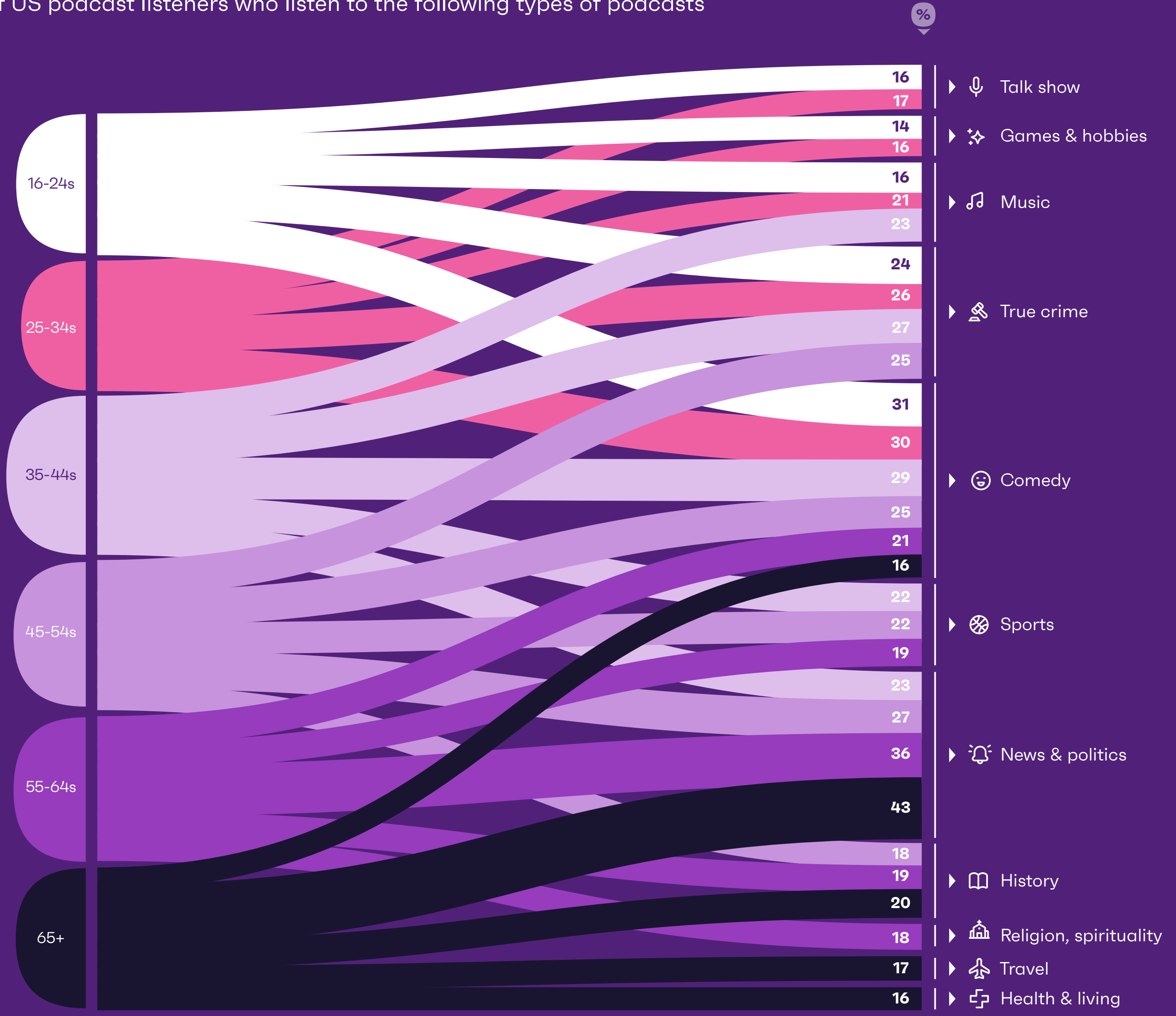


GWI USA Q3 2022   6,491 podcast listeners in the US aged 16+

Podcast genres in the US

27

% of US podcast listeners who listen to the following types of podcasts



GWI USA Q3 2022   6,491 podcast listeners in the US aged 16+

06

Ads/ subscriptions

Brand discovery

Search engines and TV ads have long battled to be the most effective way for consumers to find brands or products. However, the number who use TV for brand discovery has ticked downward over the past few years. The number who discover via TV ads has fallen 16% since Q2 2018, and in the US 46% of Americans skip through TV commercials if possible.

What people think of as a search engine is very different compared to even 5 years ago. Google still rules, but social media sites are also quickly gaining prominence. Our data tells us that Gen Zs, outside of China, use Instagram almost as often as Google, and millennials are on a similar path. On top of this, as the number who discover brands via search and TV ads drops, social media has remained relatively steady in comparison, managing to nab the top spot on the brand discovery leaderboard for Gen Z.

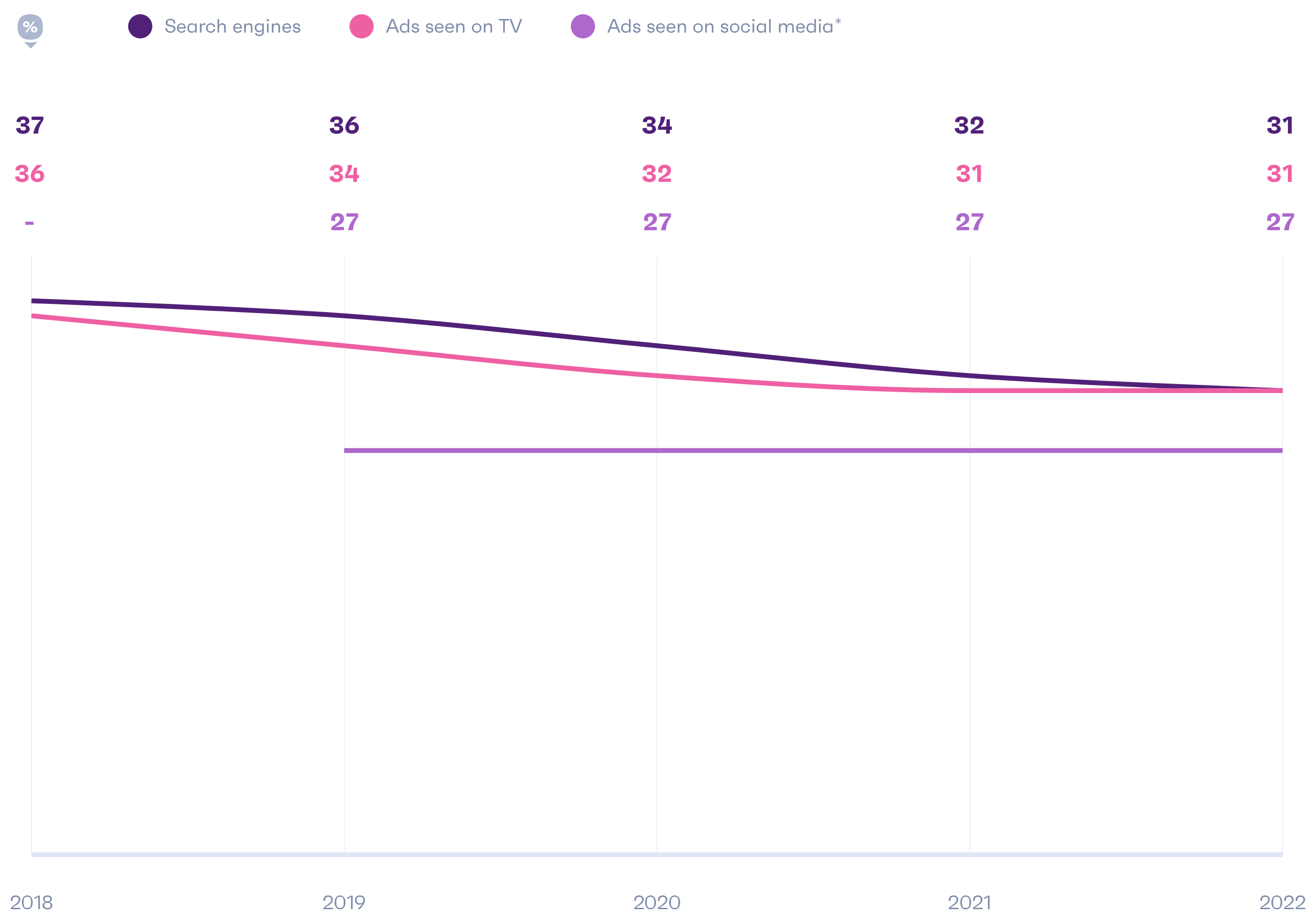
Move over ecommerce, scommerce has arrived

Download report

Brand discovery by medium

% who discover brands through the following

28



GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)

3,443,783 internet users aged 16-64 *added in Q1 2019

Ads seen on social are Gen Z's top way to discover brands

TikTok is spearheading this shift in finding information online. The appeal of TikTok is real people recounting their real experiences, instead of a search engine offering up hundreds of links that may get you the answer you're looking for. In a New York Times **article**, Kalley Huang explains that while Google is still the most prominent search engine, they're taking notice of TikTok doing the things they can't, like showing the atmosphere of a restaurant in a short clip or the real material of a clothing purchase. It's becoming much more likely for a young person to type into TikTok "best place for lunch in San Francisco" or "best skincare for dry skin" and see a person's review, followed by checking the accuracy of the review in the comment section.

Social media platforms are arranging their page to make shopping easier

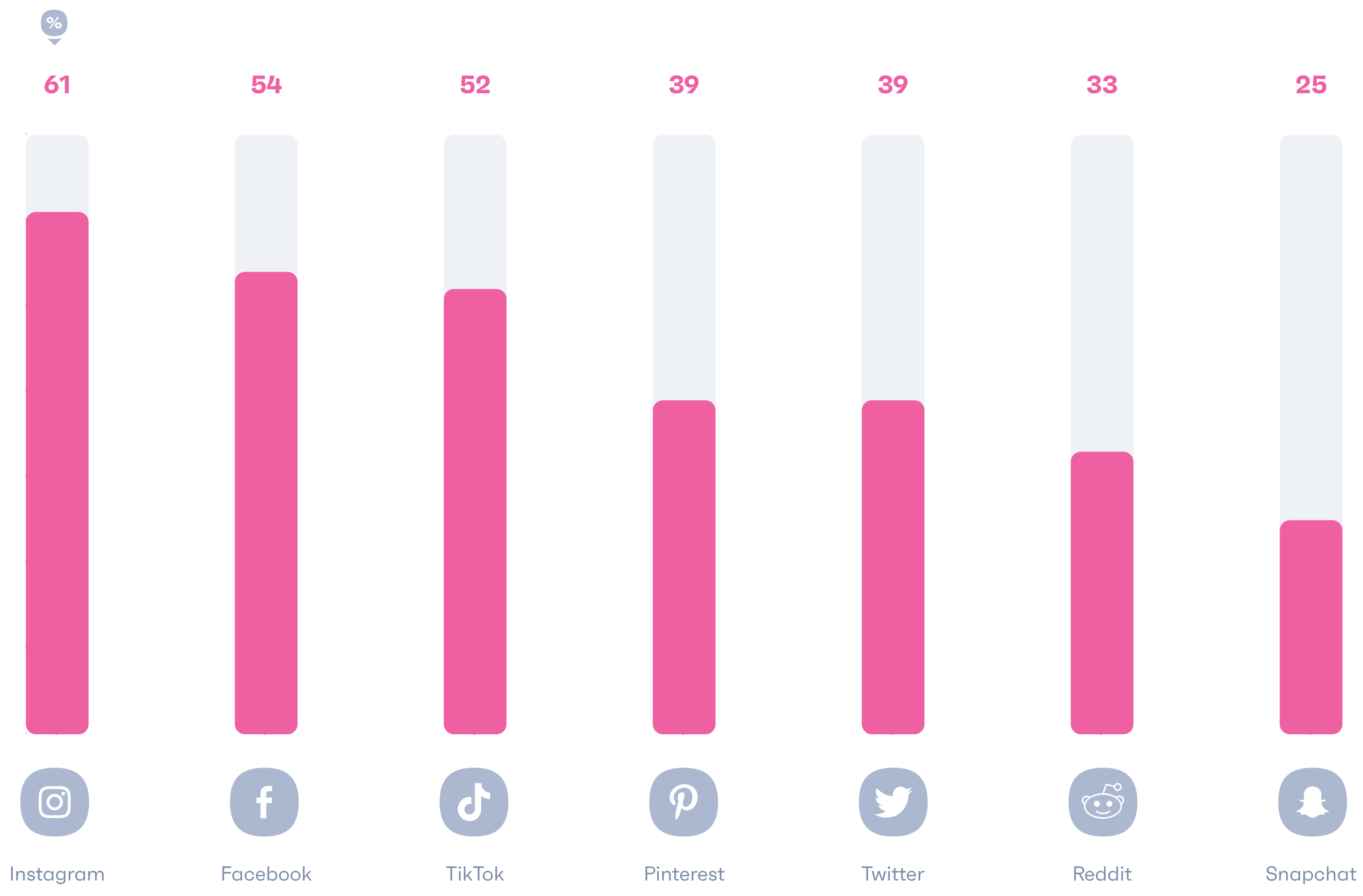
Window scrolling

Several new shopping options have appeared in the social media universe. Since 2015, the number of people using social media for product searches has risen by 43%. Today, people use Instagram to find product information just as much as they use it to find entertaining content.

Since Q4 2020, there's been a 7% increase in TikTok users who follow brand accounts, something that may prove fruitful thanks to further advertising opportunities like TikTok's **shopping ads**. As users scroll, they see numerous ads that reflect their shopping preferences. You can even be watching a non-ad related video, and TikTok will pick out keywords for a user to be taken to different results. Among TikTok users, 46% of Gen Z and millennials make an impulse purchase online at least every 2-3 weeks, and this number is likely to increase as social media ads become increasingly more personalized.

Finding products on social media

% of users on the following platforms who use them to find information about products

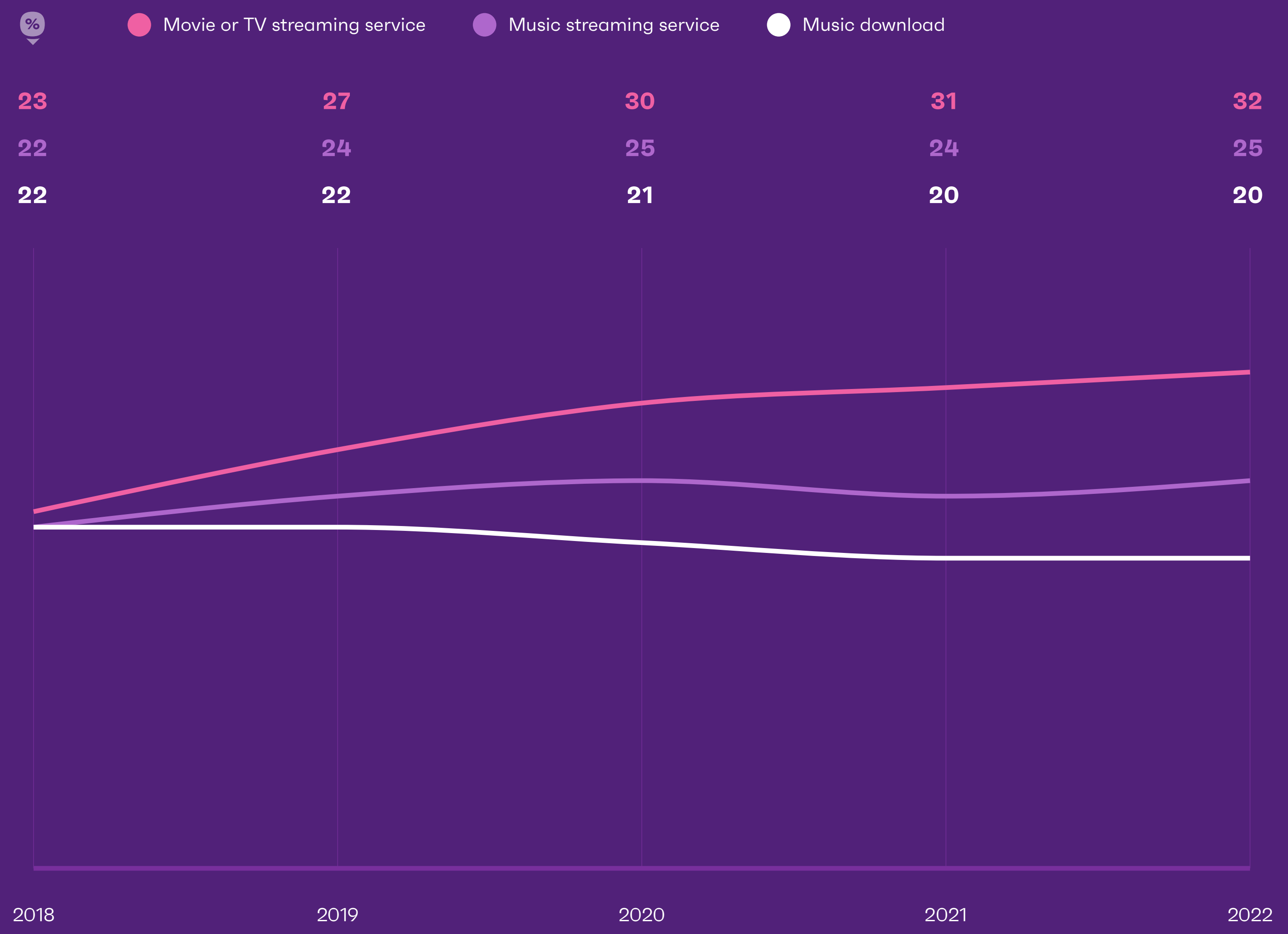


GWI Core Q2 2022

175,006 Facebook/Facebook Messenger users, 147,599 Instagram users, 112,637 TikTok users, 92,243 Twitter users, 68,258 Pinterest users 59,006 Snapchat users, and 32,114 Reddit users aged 16-64

Digital content purchased

% who've paid for the following in the past month



GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)

3,073,732 internet users aged 16-64

Services consumers are most likely to pay for

While around a third of consumers say they paid for a TV/movie streaming service in the last month, globally that number has plateaued somewhat since mid 2020. This does differ by market though; in the US, for example, the number paying for a streaming service has increased by 11% since the start of the pandemic. However, with the cost of living ramping up, platforms will need a new game plan to keep consumers on board.

Netflix and Disney+ are already on their way. Netflix is swooping into the gaming world, recently opening their fifth studio and introducing an **ad-supported tier**, something that'll likely appeal to more price-conscious consumers. Disney is also following suit later in 2022. These tactics may help streaming giants gain more traction, as 52% of internet users say price is most important to them when purchasing a streaming service. On top of this, our June Zeitgeist showed that 48% of consumers support ad-tiers on streaming services.

While music streaming overtook music downloads in Q4 2018, the number who pay for music downloads hasn't dwindled. At the same time, payment for a news service still remains low at only 12%. This links back to a subject we spoke about earlier - news fatigue. But of course, the idea of paying for news doesn't always seem necessary if you can read it on social media or watch it on TV.

Appendix

1. Which of the following devices do you own?
2. On an average day, how long do you spend on the following?
3. On an average day, how long do you spend on the following?
4. On an average day, how long do you spend on the following?
5. On an average day, how long do you spend on the following?
6. On an average day, how long do you spend online on a PC/laptop/tablet/mobile?
7. On an average day, how long do you spend watching TV | online TV/streaming?
8. On an average day, how long do you spend watching online TV/streaming | broadcast/linear TV? | In the last month, which of these services have you used to watch/download TV shows, films or videos? (YouTube)
9. In the last month, which of these services have you used to watch/download TV shows, films or videos?
10. In a typical week, which of these genres will you have watched on television?
11. Which of these things do you do online when watching TV?
12. Which of these devices do you often use while watching television?
13. What have you done on Facebook/Facebook Messenger in the last month? | What have you done on Instagram in the last month? | What have you done on Snapchat in the last month? | What have you done on LinkedIn in the last month? | What have you done on Reddit in the last month? (Watched a video)
14. On an average day, how long do you spend on online press? | On an average day, how long do you spend on physical print press?
15. On an average day, how long do you spend on online press? | On an average day, how long do you spend on physical print press?
16. Which of these things are you interested in?
17. Which of these things are you interested in? | In a typical week, which of these genres will you have watched on television?
18. On an average day, how long do you spend on games consoles?
19. Which of these devices do you use for gaming?
20. Which of these devices do you use to watch Live TV/TV Channels? | Which of these devices do you use to watch on-demand TV/streaming services?
21. On an average day, how long do you spend watching online TV/streaming? | On an average day, how long do you spend watching TV?
22. Which social media platforms do you use for information and content?
23. On an average day, how long do you spend listening to the radio? | On an average day, how long do you spend on music streaming services?
24. In the last month, which of these services have you used to listen to/download music, radio or audiobook content?
25. Which of these music genres do you like listening to?
26. Which of these platforms do you use for podcasts?
27. Which types of podcast do you listen to?
28. How do you typically find out about new brands and products?
29. Which platforms/services do you use to do the following? (Follow/find more information about brands and products)
30. 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 900,000 internet users aged 16-64 across 48 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 Q2 2022 wave of research across 48 countries, with a global sample of 244,231 respondents.

Argentina	1,841	Mexico	5,256
Australia	7,962	Morocco	1,053
Austria	2,100	Netherlands	2,631
Belgium	2,102	New Zealand	1,975
Brazil	9,199	Nigeria	876
Canada	6,565	Philippines	3,955
China	25,215	Poland	3,155
Colombia	3,944	Portugal	2,378
Czech Republic	1,315	Romania	1,315
Denmark	1,577	Russia	4,331
Egypt	1,845	Saudi Arabia	1,763
France	10,899	Singapore	3,546
Germany	10,898	South Africa	1,843
Ghana	1,053	South Korea	2,370
Greece	1,329	Spain	10,712
Hong Kong	2,063	Sweden	2,628
India	15,393	Switzerland	1,576
Indonesia	6,577	Taiwan	2,763
Ireland	1,440	Thailand	4,600
Israel	1,590	Turkey	2,109
Italy	10,532	UAE	1,751
Japan	10,566	UK	1,0543
Kenya	924	USA	2,6395
Malaysia	4,494	Vietnam	3,284

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.

	%
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

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