

# The global media landscape

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Notification



What does the future hold?

00:30 am

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# ► Introduction

A lot has happened since the last YouGov Global Media Outlook report was released earlier this year. Major global events, from the easing of the global pandemic, to war in Ukraine, to the cost-of-living crisis and the threat of a global recession, have presented new challenges for the media industry.

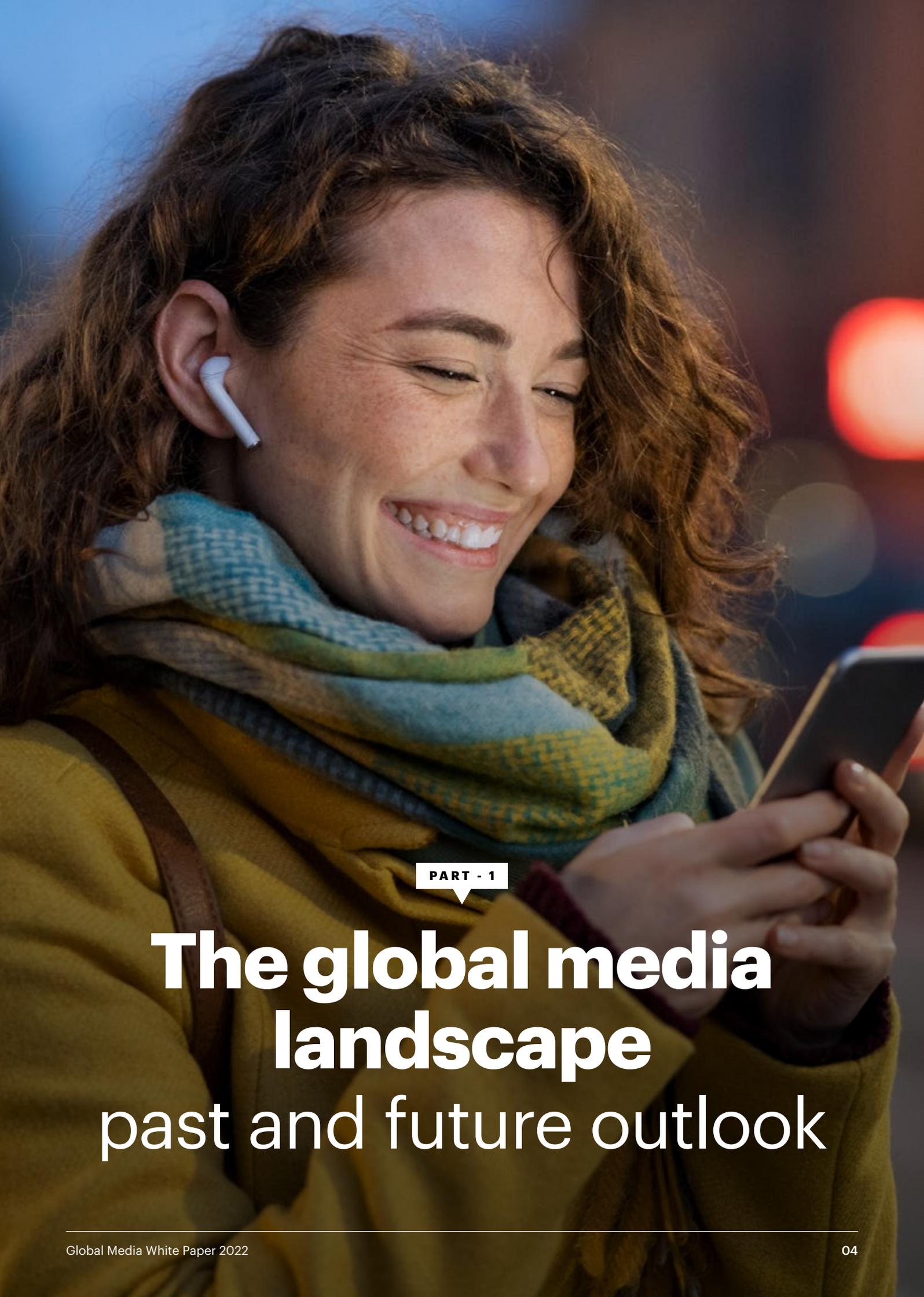
But how have global consumers adjusted their engagement with information and entertainment in these changing times, and how are they likely to evolve their media consumption patterns?

Understanding how media behaviour has changed during the last 12 months and what the future media landscape might look like in the year ahead is the key focus for this year's report. Investigating which media activities consumers are planning to stick with, and which they expect to do more of, will help guide marketers and advertisers in connecting with global audiences in the future. This report also explores attitudes to sustainability in advertising, and the potential measures that companies could implement when it comes to reducing CO<sub>2</sub> emissions in advertising.

This report combines recent YouGov research in 18 international markets and YouGov syndicated Profiles data with a specific focus on the United States and Great Britain.

Please note, our samples in East Asian markets such as China, Hong Kong, and Singapore as well as India are not all nationally representative (with some being representative of the online or urban population; see methodology for details)

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PART - 1

# The global media landscape past and future outlook

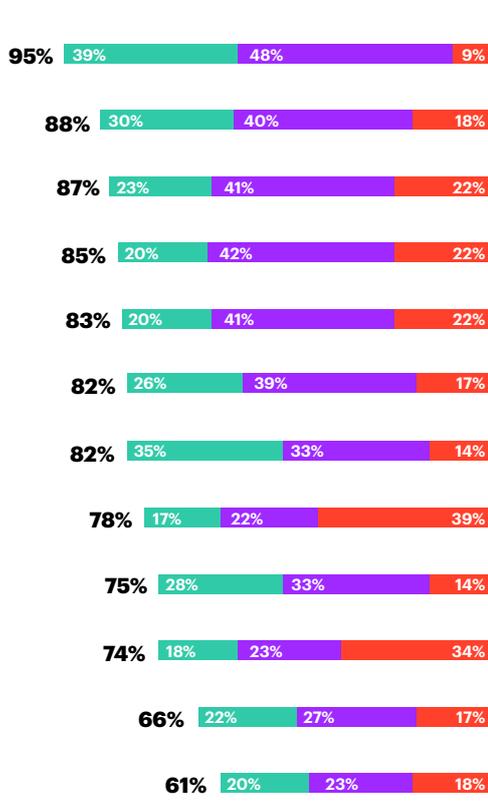
# Annual media consumption penetrations remain high

When comparing global future media behaviour to the previous 12 months, recent YouGov research shows that media penetrations remain high and stable. Digital media continues to dominate consumer choice, with websites or apps registering the highest penetration. More than nine out of ten (**95%**) global consumers report having visited

websites/apps in the last 12 months and a similar proportion (**93%**) intend to continue this activity in the next 12 months. In addition, **88%** have interacted with social media in the previous 12 months, and a similar proportion are likely to use social media in the coming 12 months.

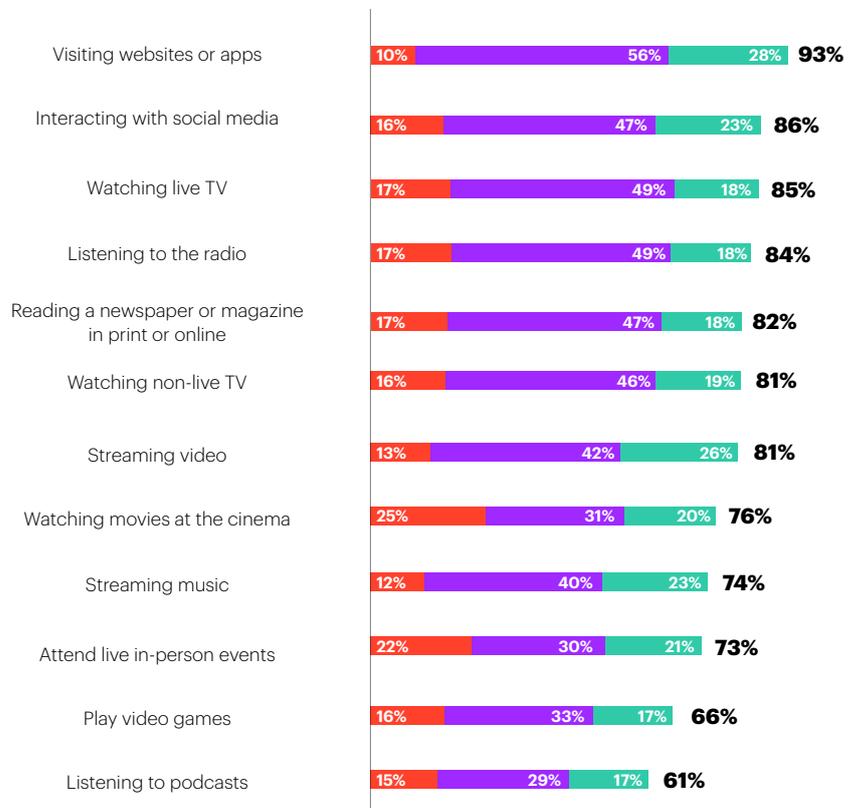
## Media activities done

In the last 12 months



## Media activities planning to do

In the next 12 months



● Less ● About the same ● More

Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

Across all media types, the global annual penetrations are almost identical between behaviour in the last 12 months and intentions in the coming 12 months. Around three quarters of all global adults have attended a live in-person event e.g. theatre, concerts, sporting events, etc. and watched movies at the cinema in the last 12 months and a similar proportion plan to undertake these activities in

the year ahead. Two thirds of global consumers have played video games on a console, PC, mobile or other device in the last 12 months and intend to participate in gaming in the next 12 months.

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# In-person activities experienced the largest decline in the previous year



The global events industry suffered one of the biggest blows during the pandemic. Recent YouGov research shows that more than a third of global consumers (**34%**) have attended fewer live events in the last 12 months, and almost four in ten visited the cinema less often. Similarly, our data shows decline in consumption for traditional

media such as listening to the radio and reading newspapers or magazines in print or online. In contrast, digital activities saw the largest increases in consumption in the previous 12 months, with more than three in ten stating they spent more time accessing websites or apps, streaming video, and interacting with social media.



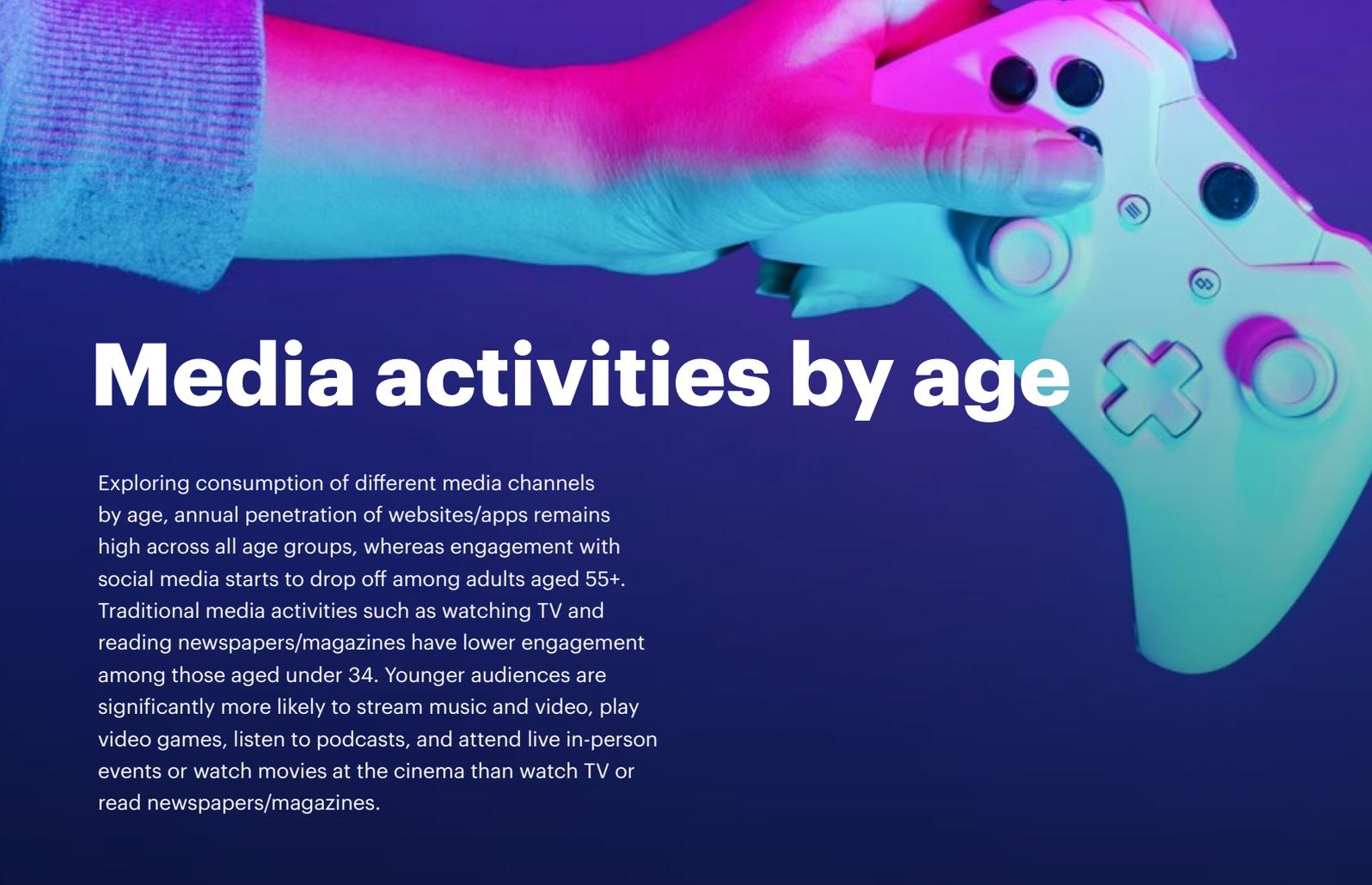
# In-person activities returning slowly

Looking to the future intentions of consumers, one fifth of global consumers plan to attend more live events and make more trips to the cinema in the next 12 months. However, this is almost entirely offset by an equal proportion of people intending to do fewer out of home activities over the same period. This suggests the lingering effect of the pandemic on cinemas and live events.

But is the uncertainty of attending physical events and media entertainment likely to continue, or are there grass shoots appearing for in-person entertainment? We will explore this further in Part 2.

In the next 12 months, digital media activities register the largest uptick in increased behaviour with around a quarter of global consumers stating they will be spending more time using websites or apps, streaming video, and music, and interacting with social media. For traditional media, (watching live and non-live TV, reading publications, and listening to the radio), the majority (circa **50%**) are not planning on changing their consumption compared to the previous year. However, the proportion who plan to decrease their consumption of traditional media (**17%**) almost cancels out those planning to increase.

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# Media activities by age

Exploring consumption of different media channels by age, annual penetration of websites/apps remains high across all age groups, whereas engagement with social media starts to drop off among adults aged 55+. Traditional media activities such as watching TV and reading newspapers/magazines have lower engagement among those aged under 34. Younger audiences are significantly more likely to stream music and video, play video games, listen to podcasts, and attend live in-person events or watch movies at the cinema than watch TV or read newspapers/magazines.

Media activities done in the last 12 months-Global						
	Global total	18-24	25-34	35-44	45-54	55+
Visiting website or apps	<b>95%</b>	94%	96%	96%	96%	95%
Interacting with social media	<b>88%</b>	94%	93%	91%	89%	78%
Watching live TV	<b>87%</b>	83%	84%	86%	88%	90%
Listening to the radio	<b>85%</b>	75%	83%	86%	88%	88%
Reading a newspaper or magazine in print or online	<b>83%</b>	78%	81%	84%	85%	84%
Streaming video	<b>82%</b>	91%	91%	89%	85%	68%
Watching non live TV	<b>82%</b>	83%	86%	85%	83%	77%
Watching movies at the cinema	<b>78%</b>	86%	85%	82%	79%	65%
Streaming music	<b>75%</b>	92%	89%	83%	77%	54%
Attend live in-person events	<b>74%</b>	79%	80%	77%	75%	66%
Play video games	<b>66%</b>	84%	81%	76%	65%	44%
Listening to podcasts	<b>61%</b>	75%	76%	66%	59%	42%

Q: In the last 12 months, have you done more, less, or about the same of the following?

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# Where is media heading?

Notification ✕

**Net Growth Score:** Percentage of those who increased their consumption of each media type minus those who have consumed less in the given period.

10:15 am

It is important to look at any likely increases in media behaviour in the context of decreases. So, if we look at the 'net growth scores' for each media activity (calculated by subtracting less consumption from more consumption percentages) in the last 12 months, we see polarization between digital media activities and outdoor in-person activities.

At the top end of the scale, websites and apps registered the highest 'net growth score' in the last 12 months (+30%), followed by streaming video (+21%). On the other hand, in-person events registered a negative 'net growth score' of -22% for watching movies at the cinema and -16% for attending live events.

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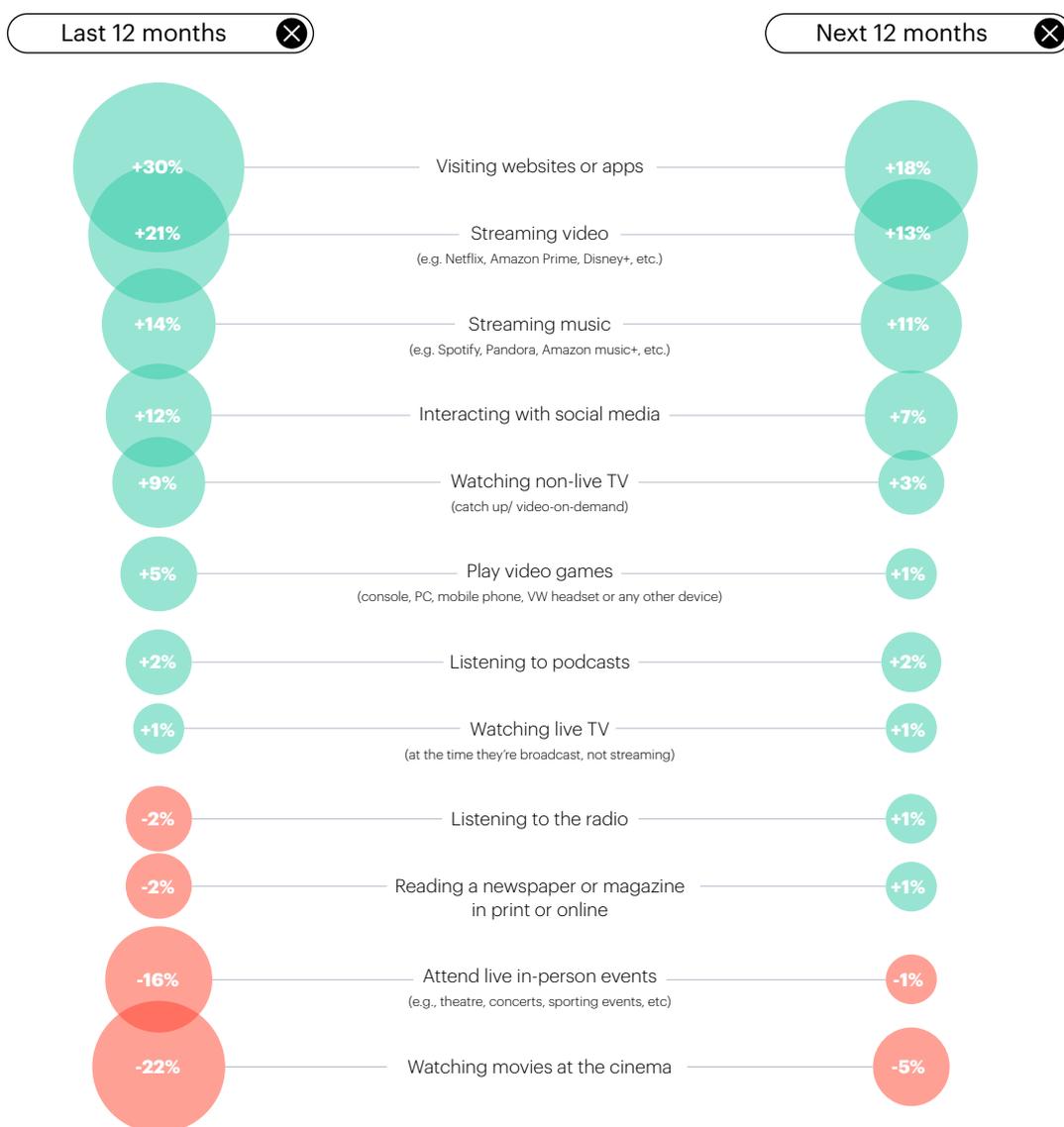
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However, the pandemic fuelled surge in digital media consumption appears to be slowing. While all digital media activities registered higher 'net growth' consumption percentages in the last 12 months than traditional media activities, looking ahead to the next 12 months, growth in consumption for all digital media types appears to be slowing. In fact, all digital media activities register lower

'net growth' scores in the next 12 months, compared to the previous 12 months. For example, the 'net growth' score for video streaming declines from **+21%** in the last 12 months, to **+13%** in the next 12 months. This deceleration in the amount of time devoted to video streaming indicates a potential increase in churn rate in the year ahead.

### Media 'net growth' scores Global total



Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

On the other hand, as the pandemic gradually eases across many markets, and travelling and commuting routines begin to pick up, radio listening shifts from a negative (-2%) 'net growth score' listening in the last 12 months, to a positive (+1%) increase in the next 12 months. Similarly, we see 'net growth' for print readership increasing from -2% in the last 12 months, to +1% in the next 12 months.

Outdoor activities registered the highest proportion of consumers doing less in the last 12 months, with a 'net growth score' of -22% for visiting the cinema, and -16% for attending live in-person events.

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Despite some consumers remaining cautious about attending physical events, the gap between those expecting to increase their number of outings (rather than decrease) is closing. For example, attending live events registered **-1%** 'net growth' in the next 12 months (compared to **-16%** in the previous 12 months) and visiting the cinema increased from **-22%** in the last 12 months to **-5%** for the next 12 months.

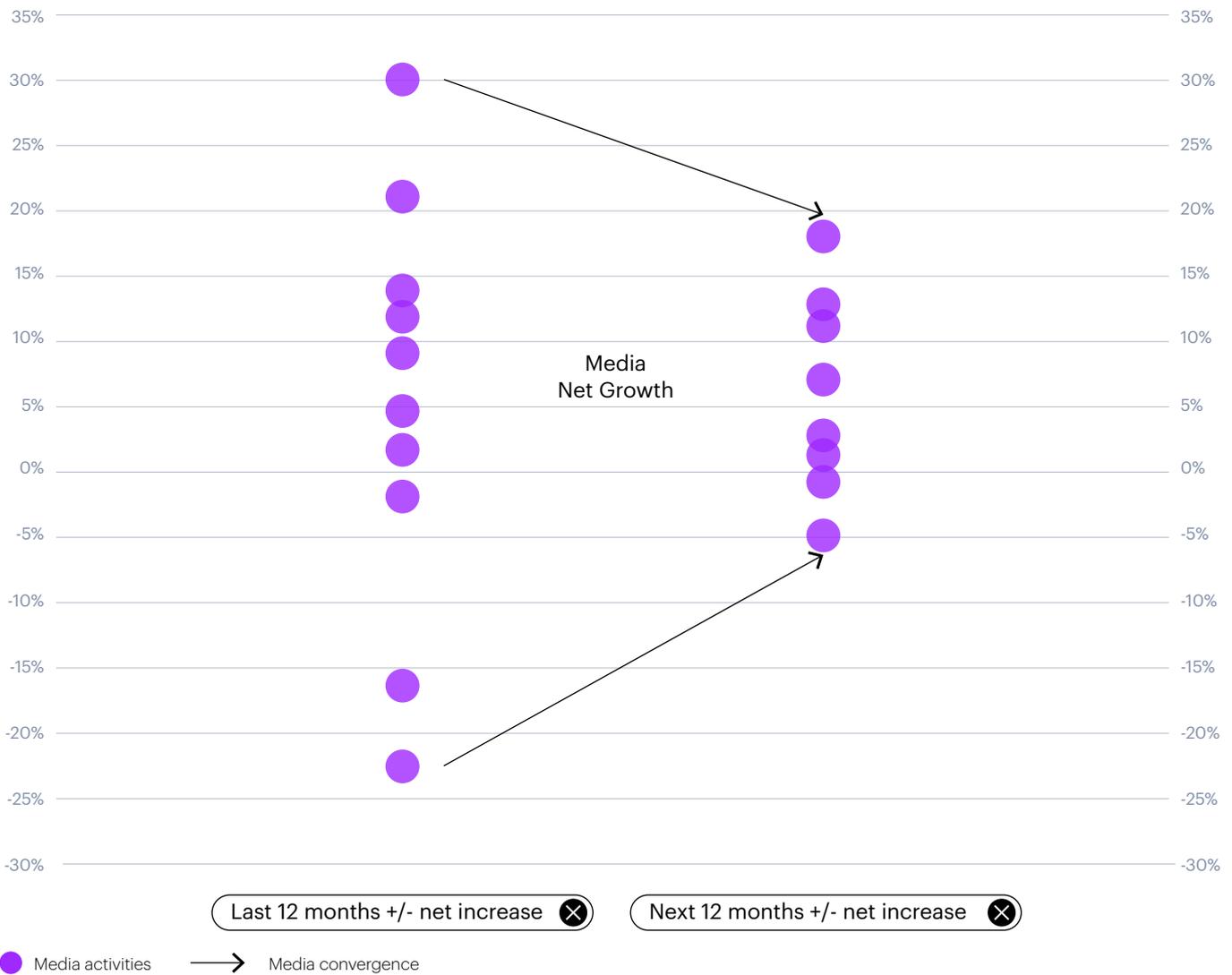
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# Convergence in media growth

When comparing the 'net growth' scores for all media activities in the last 12 months, we see a convergence of growth scores between digital and traditional media in

terms of likely increased media consumption in the next 12 months, with digital consumption slowing and traditional media, including events and outdoor activities growing:

**Media 'Net growth' convergence last 12 months/next 12 months**



Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

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PART - 2

# The Future Media State of Play

As media behaviour continues to evolve, it is key for marketers and advertisers to understand which media consumption habits are most likely to stick, and which are set to grow among current consumers. Using YouGov research across 18 international markets, our **stickiness** metrics

and **growth driver** metrics explore the relationship between past and future media behaviours, and identifies the proportion of global consumers who are likely to continue with their previous media choices, and the proportion who are likely to increase their consumption:

Notification ✕

**Stickiness:** Those who claim to have maintained or increased their consumption of each media type in the last 12 months, and are likely to maintain or consume more in the next 12 months

1:45 pm

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**Growth Drivers:** Those who claim to have maintained or increased their consumption of each media type in the last 12 months and are likely to do more in the next 12 months.

2:30 pm

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# Which media behaviour will stick around in 2023?

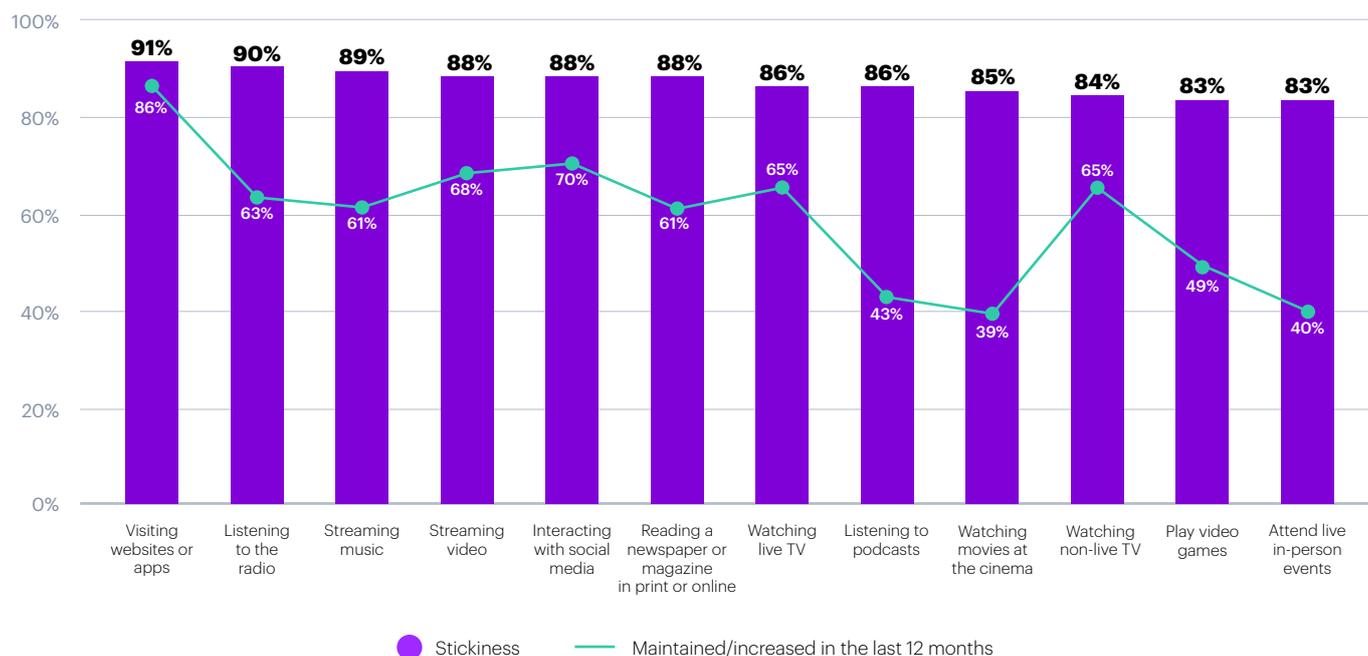
Although penetrations vary across the range of media consumed across the 18 international markets surveyed, our research reveals that global consumers are creatures of habit, with more than eight in ten intending to either increase or maintain their consumption of all media types in the coming 12 months. **91%** of global users of websites or apps will continue to do so in the next 12 months, and **89%** of consumers streaming music will continue to do so in the future.

Interestingly, traditional media including radio and reading newspapers or magazines also register strong stickiness scores, confirming high levels of continued engagement

across the mix of media activities. Although listening to podcasts and gaming register lower annual penetrations compared to more established media activities, among those engaged in these activities, there is a strong propensity to continue.

Due to the ongoing impact of the global pandemic, activities involving travel, such as visiting the cinema, or attending live events, registered lower annual penetrations globally in the last 12 months. However, stickiness levels remain high among current consumers at **85%** and **83%** respectively, and interesting insights emerge for the events and cinema sectors when we explore our growth driver metric.

**Stickiness by media type**  
Global total



Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

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# Gen Z loyalty challenge

With strong proportions of global consumers intending to stick with their media choices, do certain demographic groups have higher propensities to stick than others? Exploring media stickiness by different demographic groups we see very little difference by gender with equal proportions of males and females intending to continue their existing engagement with each media channel.

Comparing differences by age, older age groups have more established routines than younger generations, and consequently have a higher propensity to stick with all media types globally, particularly more traditional media activities such as watching TV, listening to the radio, and reading newspapers or magazines.

While stickiness levels remain high for all media types among global 18–24-year-olds (ranging from **74%** to **87%**), younger adults present a loyalty challenge for marketers and advertisers and are less loyal and less likely to stick with their media choices than older generations, particularly for more traditional media activities such as listening to the radio, reading a newspaper or magazine, and watching live and non-live TV.

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## Stickiness by media type - Global by age

	Global stickiness	18-24	25-34	35-44	45-54	55+
Visiting websites or apps	<b>91%</b>	87%	90%	92%	92%	92%
Listening to the radio	<b>90%</b>	77%	84%	90%	92%	95%
Streaming music	<b>89%</b>	87%	89%	90%	89%	87%
Streaming video	<b>88%</b>	84%	87%	90%	89%	89%
Interacting with social media	<b>88%</b>	84%	88%	89%	88%	90%
Reading a newspaper or magazine in print or online	<b>88%</b>	82%	83%	87%	90%	92%
Watching live TV	<b>86%</b>	77%	83%	85%	88%	91%
Listening to podcasts	<b>86%</b>	82%	86%	86%	87%	87%
Watching movies at the cinema	<b>85%</b>	81%	85%	86%	86%	85%
Watching non-live TV	<b>84%</b>	74%	83%	85%	85%	87%
Play video games	<b>83%</b>	78%	83%	84%	83%	84%
Attend live in-person events	<b>83%</b>	78%	83%	83%	84%	84%

Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

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# Media growth drivers in 2023

So, we have explored whether global consumers are likely to increase or decrease their consumption of each media type, and highlighted media convergence among 'net growth' consumers (where more traditional media and outdoor activities are closing the gap on digital), but which media activities are likely to increase the most in the coming 12 months among current consumers?

Using our growth driver metric, defined as 'Those who claim to have maintained or increased their consumption of each media type in the last 12 months and are likely to do more in the next 12 months'. In line with our 'net growth scores', digital media activities register the highest growth driver scores among existing users.

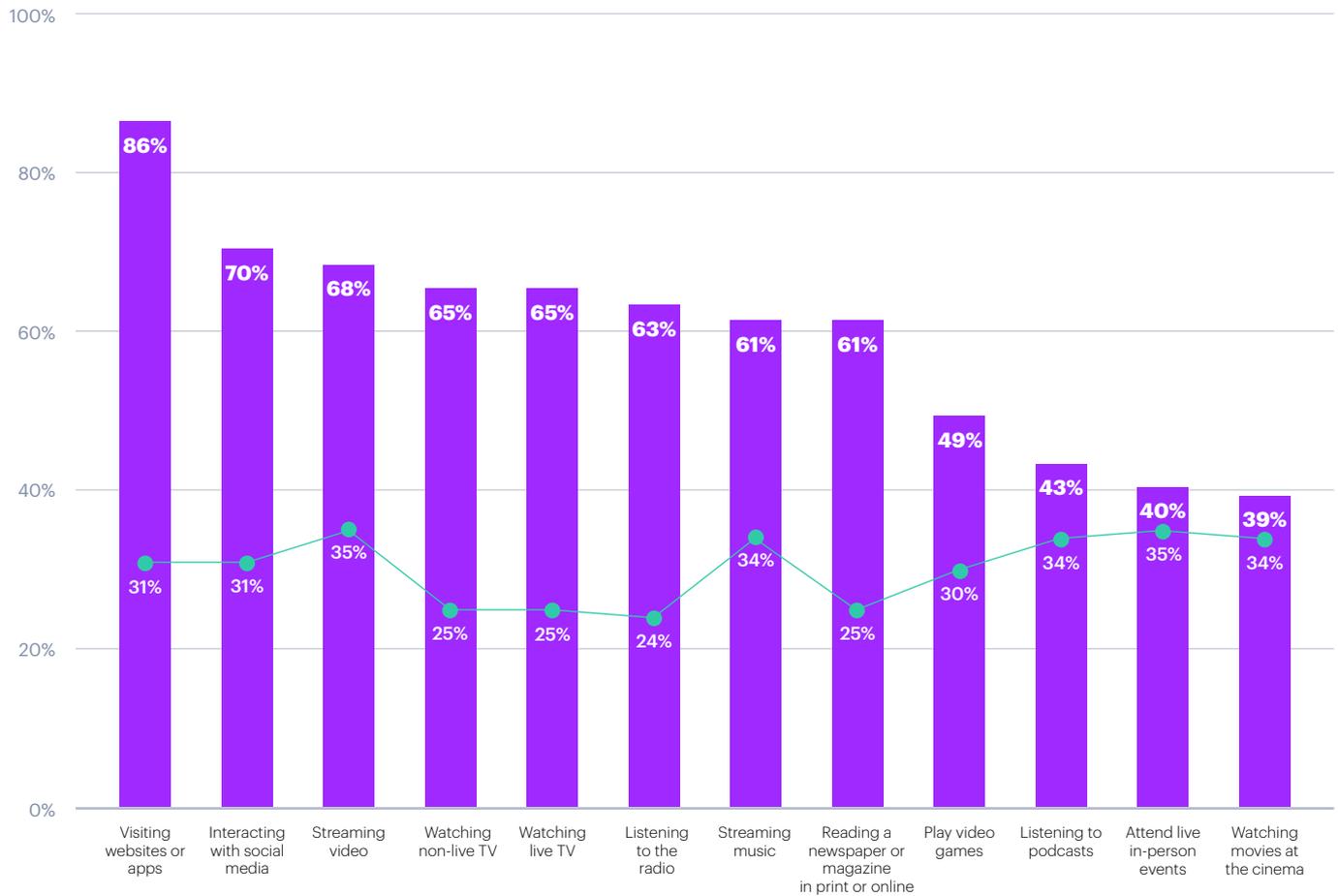
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## Growth drivers

● Media activities done more/same in last 12 months — Growth driver



Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

More than a third (**35%**) of global consumers who either maintained or increased their video streaming consumption in the last 12 months are likely to increase their use of video streaming services in the next 12 months. Streaming music followed, with a growth driver score of **34%**. While a lower proportion of the global population have consumed podcasts more or the same in the last 12 months than other digital activities, the growth driver score for podcasts is high (**34%**), and aligns with streaming video and music, reflecting the growing level of engagement podcasts have among listeners. Video games also displays a strong growth driver score of **30%**. More traditional media channels such as radio, newspapers or magazines, and TV, register lower growth driver scores of around **25%**.

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One of the most compelling findings from our research is that attending live in-person events (**35%**), and watching movies at the cinema (**34%**), registered the top growth driver score globally (equal to streaming video). This suggests that among current users, their appetite to do more outdoor activities in the coming 12 months is on a par with streaming digital content.

This anticipated growth among current participants present significant opportunities for the cinema and events sector. Many marketers recognise the value of these increasingly engaged audiences and have raised their cinema and events budgets to reach them, but the challenge for both the cinema and events sectors is how to encourage consumers who still feel uncertain about engaging in these activities, to consider returning.



# Gen Z cohort dominates growth drivers

Earlier in the report we explored media stickiness by different age groups and identified that older generations are more likely to stick with all the media types they consume than younger generations, however, when we look at growth drivers for each media type by age, the opposite pattern emerges.

Adults aged 18-24 who have maintained or increased their media consumption of each media type in the last 12 months, are significantly more likely to increase their consumption of all media activities in the coming 12 months compared to older generations. This is particularly true for

digital media where growth driver scores among 18-24-year-olds are between **46%** and **48%** for streaming music, accessing websites/apps, streaming video, and interacting with social media, compared to **16%** to **24%** among the over 55s. In most cases, their growth driver scores for all media are double the amount of their older counterparts.

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This data suggests three things, firstly, older consumers have established routines for the media types they consume and are more likely to maintain their media consumption patterns, and less likely to do more. Secondly, while younger consumers are less likely to stick around, if they can be attracted and retained by publishers and content providers, they are highly engaged, and their propensity to do more is significant, which is particularly true for digital media. Younger adults offer a greater lifetime value than older demographics and are a hugely important demographic for

marketers and advertisers alike. Finally, 18-24-year-olds who have already used each media type in the last 12 months, have a high appetite for increasing their consumption, although this cohort often use freemium based brand models, so while marketers should target them, often older age demographics can present larger potential revenue opportunities. The 55+ age group are often a forgotten generation for marketers but represent not only a sizeable proportion of the population but also have significant spending power.

Growth drivers by media type – Global by age						
	Global growth drivers	18-24	25-34	35-44	45-54	55+
Watching Live TV	<b>25%</b>	36%	35%	28%	23%	15%
Watching non-live TV	<b>25%</b>	34%	32%	28%	22%	17%
Streaming video	<b>35%</b>	46%	41%	37%	31%	24%
Listening to the radio	<b>24%</b>	29%	32%	28%	25%	17%
Streaming music	<b>34%</b>	48%	39%	34%	30%	20%
Listening to podcasts	<b>34%</b>	42%	39%	35%	32%	23%
Visiting websites or apps	<b>31%</b>	47%	39%	35%	29%	18%
Interacting with social media	<b>31%</b>	47%	39%	33%	28%	16%
Reading a newspaper or magazine in print or online	<b>25%</b>	38%	33%	28%	22%	15%
Watching movies at the cinema	<b>34%</b>	40%	39%	36%	32%	23%
Attend live in-person events	<b>35%</b>	45%	41%	36%	32%	25%
Play video games	<b>30%</b>	43%	36%	32%	26%	15%

Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

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# Growth drivers by country

When comparing media growth driver rankings by country, we see some interesting differences emerging. Attending live in-person events (ranked first equally with streaming video globally) appears in the top three for 12 out of the 18 international markets surveyed and is the top growth driver in 10 countries. Growth driver rankings for attending in-person events compared to other media activities are higher in Canada, US, Australia, and Western Europe. With the exception of Singapore, live events do not rank in the top three tier in any Asian market, possibly due to the continuing impact of the pandemic across the region. Continuing the out-of-home theme, visiting the cinema appears in the top three for half of the countries reported, mainly the European markets.

Streaming video has a strong presence in 13 out of 18 Asian and European countries. Asian markets generally, have a stronger prominence of digital media, with websites/apps identified as their top growth drivers. More traditional media forms such as radio, newspapers or magazines and TV do not appear in the top three for any of the markets except Poland. Poland places live events/radio and podcasts on equal levels of predicted growth in the next 12 months. Podcasts rank second or third across 10 of the markets and streaming music appears second in Mexico, Denmark and India and third for China, Poland, and the US.

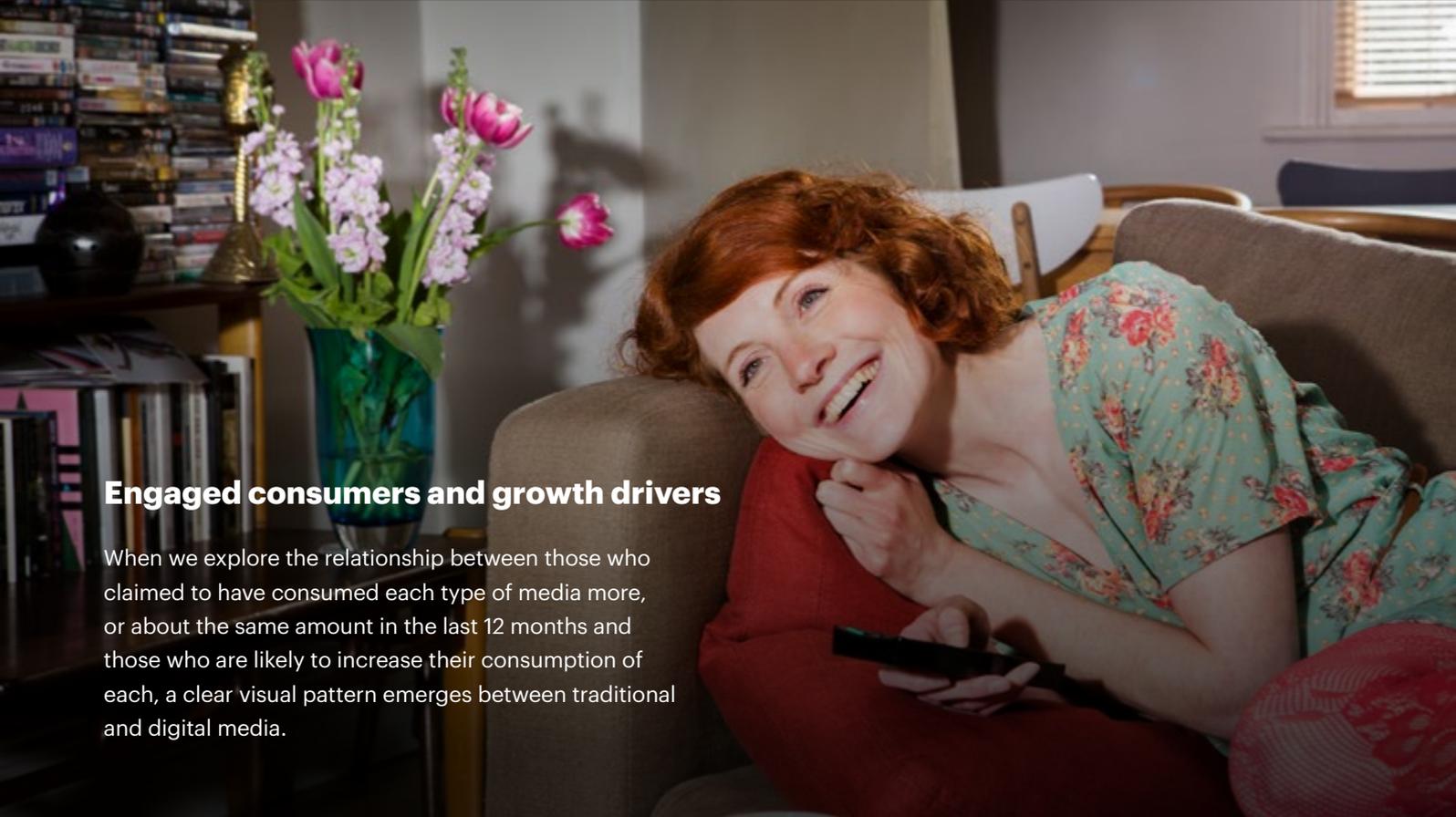
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## Growth drivers by media type and by country

	<b>1st TIER</b>	<b>2nd TIER</b>	<b>3rd TIER</b>
<b>Global</b>	<b>Attend live in-person events / Streaming video</b>	<b>Watch movies at the cinema / Listening to podcasts / Streaming music</b>	<b>Visiting websites / Interacting with social media</b>
<b>GB</b>	Attending live in-person events	Listening to podcasts	Watching movies at the cinema
<b>Germany</b>	Attending live in-person events	Streaming video	Listening to podcasts
<b>France</b>	Streaming video	Attending live in-person events	Watching movies at the cinema
<b>Italy</b>	Attending live in-person events	Streaming video	Watching movies at the cinema / Listening to podcasts
<b>Denmark</b>	Attending live in-person events / Listening to podcasts	Watching movies at the cinema / Streaming music	Streaming video
<b>Sweden</b>	Attending live in-person events	Watching movies at the cinema	Listening to podcasts / Streaming video
<b>Spain</b>	Attending live in-person events	Watching movies at the cinema	Streaming video
<b>USA</b>	Attending live in-person events / Listening to podcasts	Watching movies at the cinema	Streaming music
<b>Mexico</b>	Streaming video	Streaming music	Visiting websites or apps
<b>UAE</b>	Visiting websites or apps	Streaming video	Interacting on social media
<b>India</b>	Visiting websites or apps	Interacting with social media / Streaming music	Streaming video
<b>Australia</b>	Attending live in-person events	Listening to podcasts	Watching movies at the cinema
<b>Indonesia</b>	Visiting websites or apps	Interacting with social media	Listening to podcasts
<b>Hong Kong</b>	Visiting websites or apps	Streaming video	Watching movies at the cinema
<b>Singapore</b>	Attending live in-person events	Visiting websites or apps	Streaming video
<b>Canada</b>	Attending live in-person events	Listening to podcasts	Watching movies at the cinema
<b>Poland</b>	Streaming video	Attending live in-person events / Listening to radio / Listening to podcasts	Streaming music
<b>China</b>	Visiting websites or apps	Steaming video	Streaming music

Q: In the last 12 months, have you done more, less, or about the same of the following?

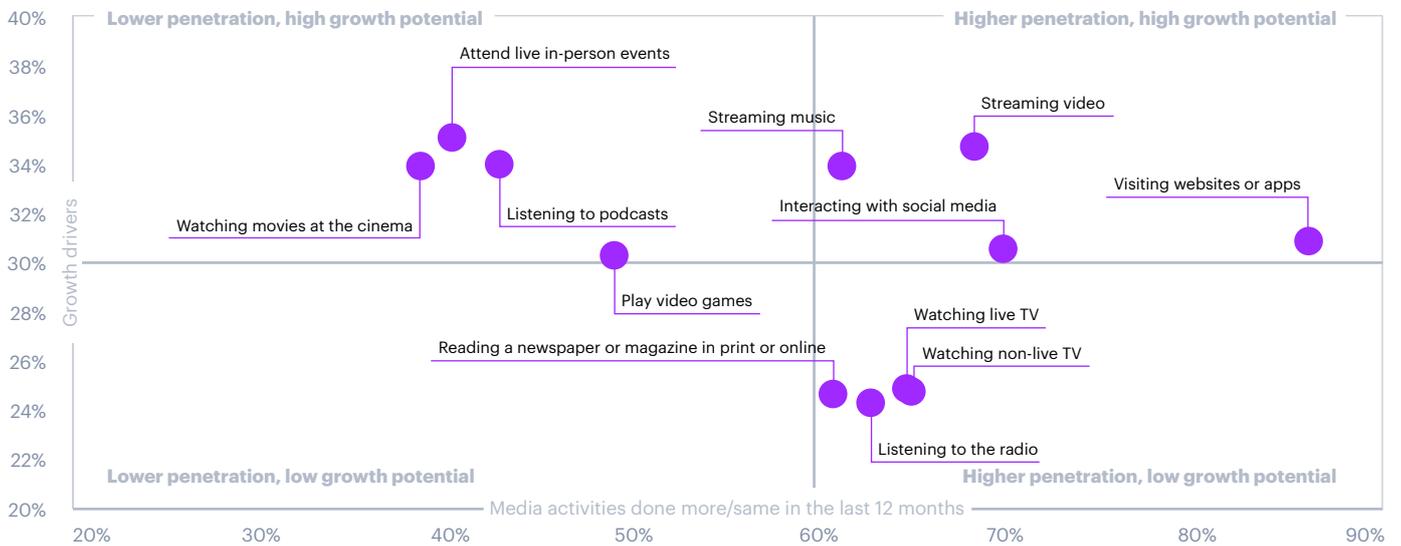
Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?



## Engaged consumers and growth drivers

When we explore the relationship between those who claimed to have consumed each type of media more, or about the same amount in the last 12 months and those who are likely to increase their consumption of each, a clear visual pattern emerges between traditional and digital media.

### The relationship between past and future media activities Global total



Q: In the last 12 months, have you done more, less, or about the same of the following?

Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

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The matrix above plots the proportion of global consumers who have maintained or increased their consumption of each media type on the X-axis, and the growth driver score on the Y-axis. The media activities can be grouped into a series of quadrants based on media use, and potential growth in consumption and some interesting insights emerge:

1. All media types in the upper quadrants represent those with the greatest opportunity for increasing consumption. They are well-spaced, indicating that while relative growth potential is high across the board, levels of those consuming more, or about the same in the last 12 months vary considerably.
2. All digital media categories including streamed music and video, podcasts, and social media sit in the upper right-hand quadrant, representing high engagement in the last 12 months, and increased activity in the future.
3. In-person events sit in the top left-hand quadrant, where engagement in the last 12 months has been lower, but potential future growth is strong. Podcasts are also one to watch, with lower user penetrations but high potential growth in listening in the next 12 months.
4. Traditional media activities including reading newspapers/magazines, listening to the radio, and watching TV sit in the higher penetration and low growth potential quadrant, and are highly clustered. Media activities in this quadrant have reached saturation point, and further growth in consumption is less likely than digital.

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PART - 3

# The path ahead for subscription services

# To subscribe, or not subscribe? That is the question.

Subscription video on demand (SVOD) surged during the pandemic as stay at home restrictions led to considerable increase in binge watching through services such as Amazon Prime, Disney+ and Netflix. In 2022, as the effects of the pandemic begin to ease in many countries, people are spending less time at home, and less time with streaming services. The cost-of-living crisis and rises in inflation and national debt are challenging consumer intentions to subscribe, and subscription rates appear to have plateaued. In addition, stiff competition from a plethora of subscription services has led to global audiences reviewing the VOD services they subscribe to.

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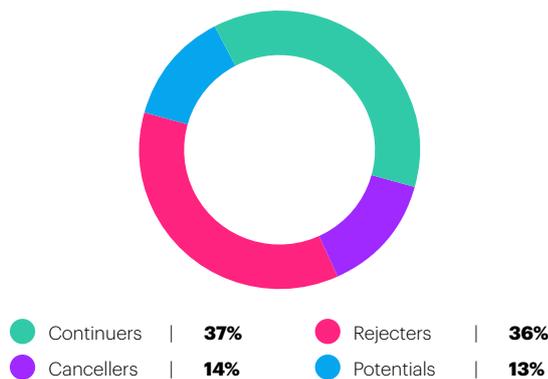


# Will consumers continue to pay for video on demand subscriptions?

As highlighted earlier, while **35%** of global consumers increased their video streaming consumption in the last 12 months, this drops to **26%** who are likely to increase their viewing in the next 12 months, suggesting growth is plateauing. However, YouGov research shows that across the international markets surveyed, **37%** of global consumers

currently subscribe to and plan to continue their SVOD services next year, and this is higher than other types of paid-for content services. Additionally, **13%** do not currently pay for VOD services, but may consider signing up in the year ahead, highlighting the potential for subscription growth.

## Paid for video on demand subscription intention | Global total

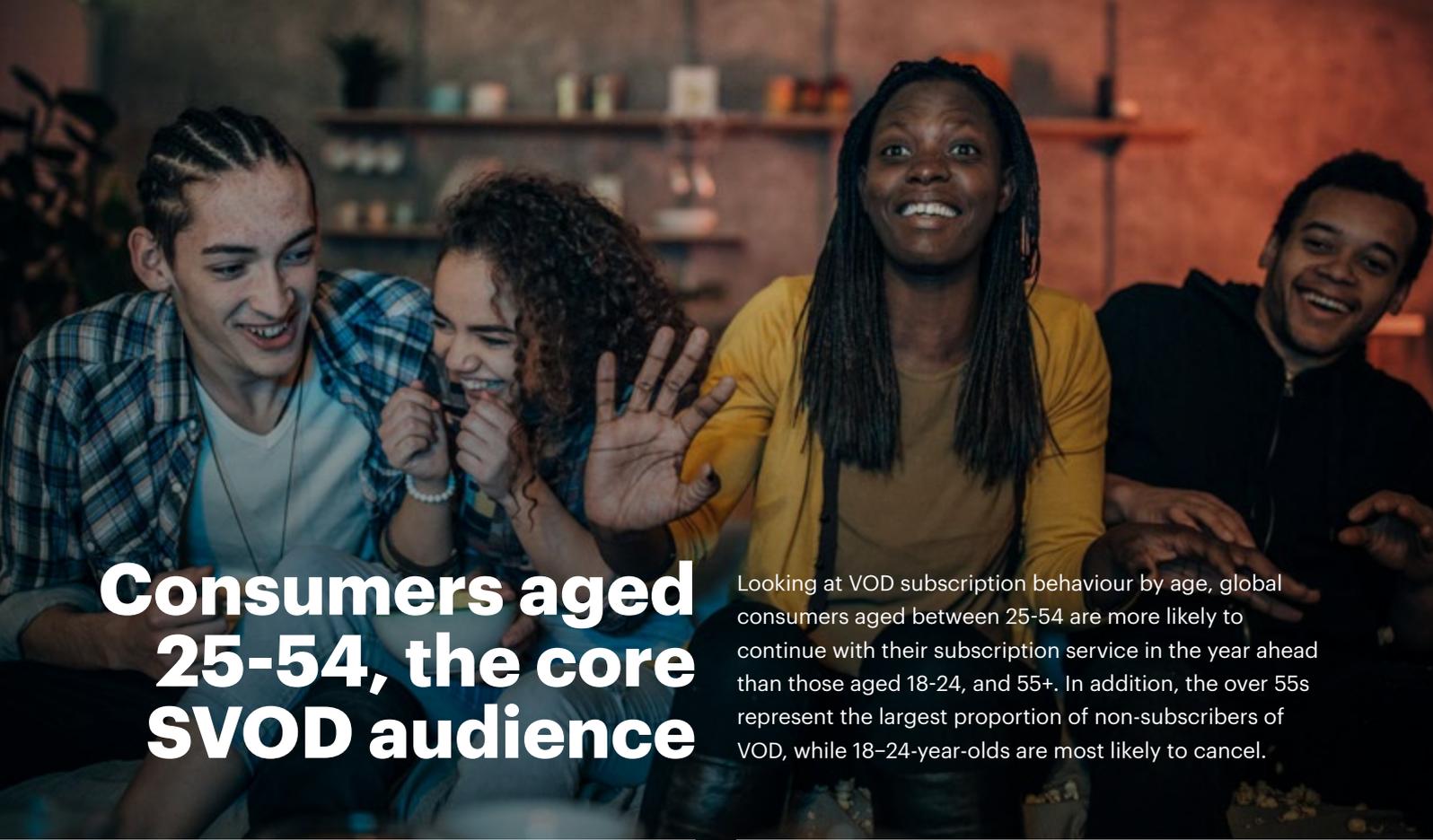


Q: Which of the following best describes your subscription(s) to the following types of paid-for content services?  
Video on Demand

Almost equal proportions of global consumers are considering cancelling their SVOD services (**14%**) as those who are potentially considering subscribing in the future (**13%**) and a third are non-subscribers (**36%**). Notably, we see

- Notification ✕  
**Continuers:** Currently pay for and likely to continue next year 12:37 pm
- Notification ✕  
**Potentials:** Do not pay for, but may consider subscribing next year 12:38 pm
- Notification ✕  
**Cancellers:** Currently pay for, but likely to cancel next year 12:39 pm
- Notification ✕  
**Rejecters:** Do not pay for and unlikely to subscribe next year 12:40 pm

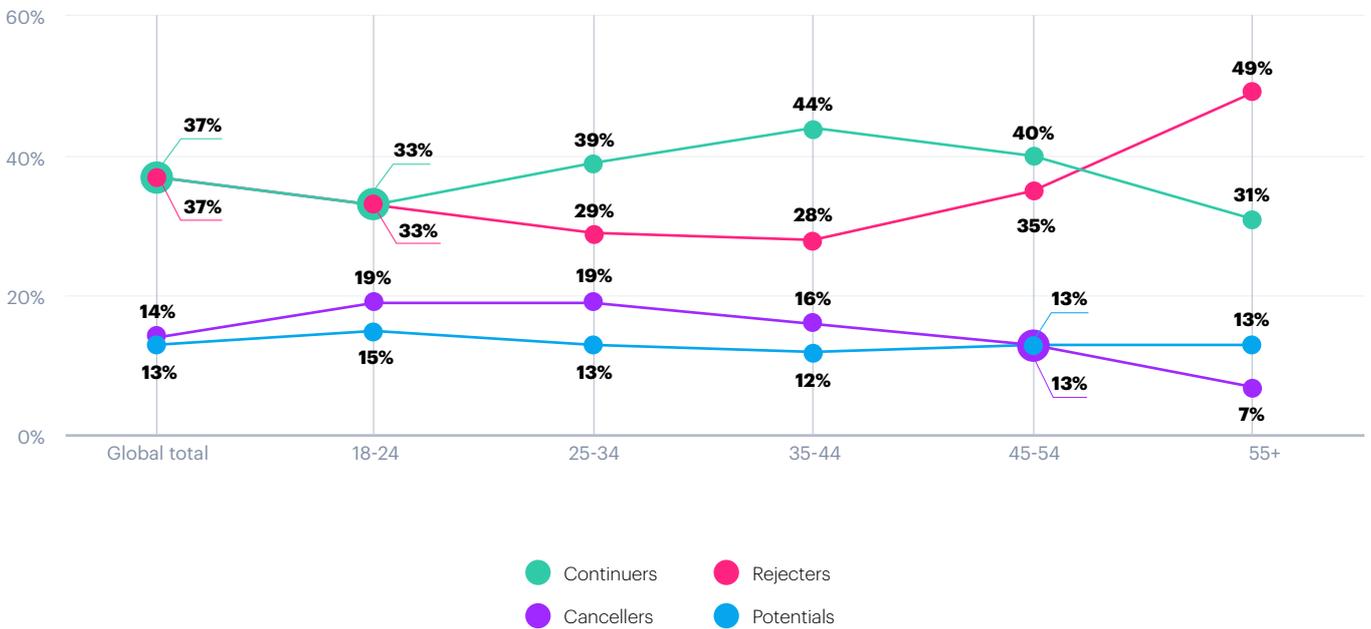
an equal split between global consumers likely to continue to pay or may consider paying for VOD subscriptions next year than those unlikely to sign up or cancel (both **50%**).



# Consumers aged 25-54, the core SVOD audience

Looking at VOD subscription behaviour by age, global consumers aged between 25-54 are more likely to continue with their subscription service in the year ahead than those aged 18-24, and 55+. In addition, the over 55s represent the largest proportion of non-subscribers of VOD, while 18-24-year-olds are most likely to cancel.

**Paid for video on demand subscription intentions by age**  
Global total



Q: Which of the following best describes your subscription(s) to the following types of paid-for content services?  
Video on Demand

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Looking at consumers of VOD subscriptions by country, on balance, Western Europeans are more likely to pay for subscriptions in the coming year than Asian consumers. Regulatory controls have stifled expansion in some Asian markets such as China, who are less open to global platforms.

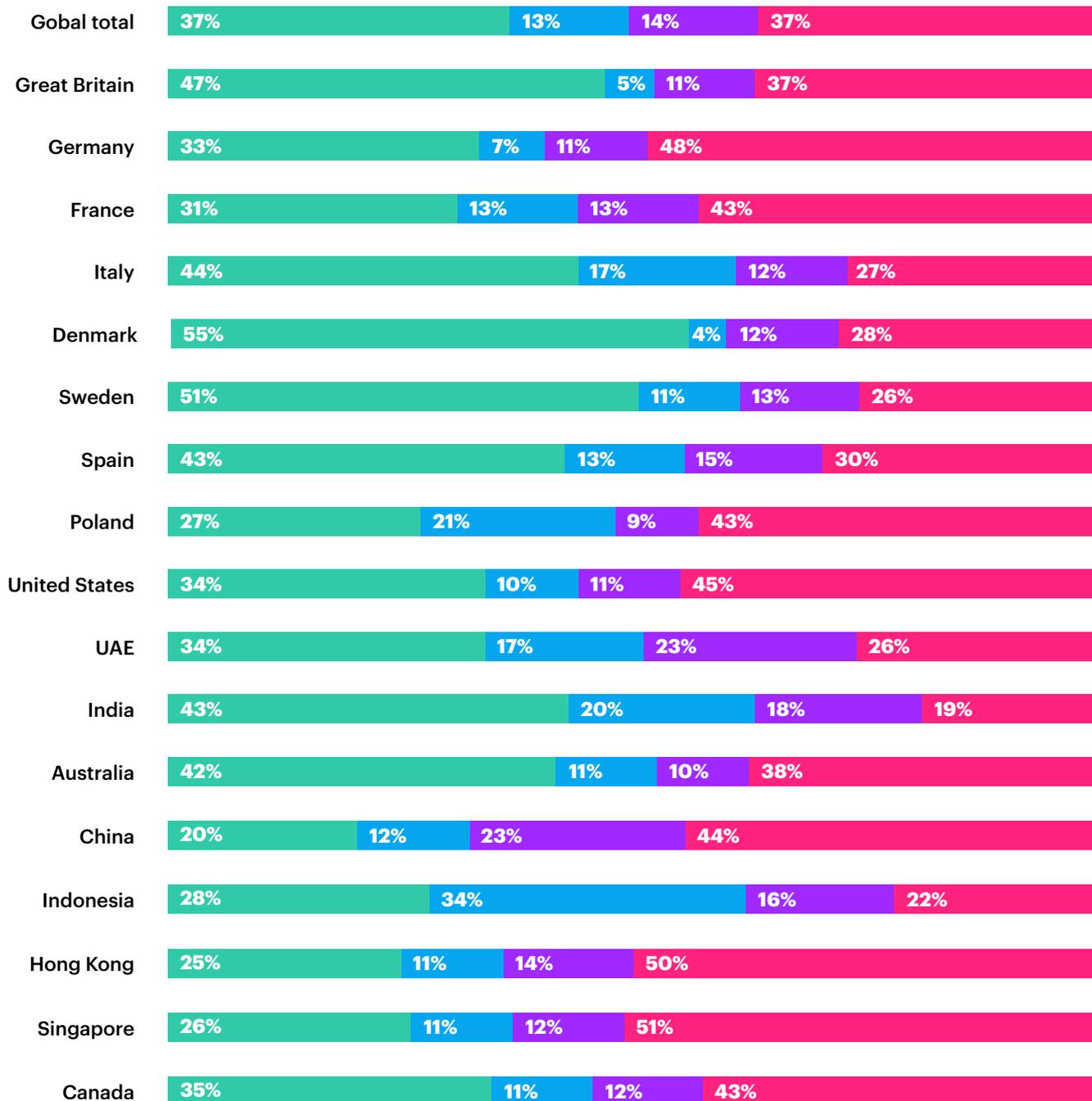
European markets such as Denmark, Sweden and Great Britain have the highest demand for VOD, with more than half (**55%**) of Danes, Swedes (**51%**), and **47%** of Brits currently paying for, and likely to continue subscriptions next year.

Indonesia has the highest proportion of potential new VOD subscribers in the year ahead. Among the markets surveyed,

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### Paid for video on demand intentions by country

Continuers Potentials Cancelers Rejecters



Q: Which of the following best describes your subscription(s) to the following types of paid-for content services?  
Video on Demand



# What influences VOD paid subscriptions?

But what drives decisions to sign up to paid VOD services? Using YouGov data, we explored the factors that may influence subscription decisions in the next 12 months among our global SVOD continuer, potential, and canceler audiences and some interesting differences emerged.

Among global continuers, a third claim to be satisfied with their current subscription package and more than a fifth cite general contentment with the service provided and a feeling that their subscription package offers them good value for money. They balance this air of satisfaction with a view that they would not pay for a service they would not use, suggesting if their SVOD provider is catering to their entertainment needs, they will continue to subscribe.

For global potentials, who are considering subscribing, they need assurance that they will make full use of the service they pay for, and they need to be convinced that the content offering will provide them with something they cannot get elsewhere for free. They are also cautious about being locked into a contract, and therefore may look for the flexibility to 'opt out' and cancel at any time. This has been addressed

by some providers such as Netflix, where they offer an on/off subscription model, as these are not long-term contracts, producing and releasing new content at key intervals is essential in retaining and encouraging new customers.

Although cost is a key influencer for cancelers when considering changing their subscription plans, it is also a key factor for all subscription groups. For global cancelers specifically, they are open to ad free content which may offset the cost of subscribing and are open to deal switching and free trials generally, suggesting they are more cost conscious. Many providers are now offering ad supported services at a lower rate or free, such as Amazon Freevee in the US, UK, and Germany. In addition, Netflix 'Basic with Ads' is a cheaper subscription plan that includes ads, and the service is available in The UK and US, Canada, Mexico, Australia, Brazil, France, Germany, Italy, Japan, South Korea and Spain.

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# Factors influencing changes to subscriptions in the next 12 months | Global

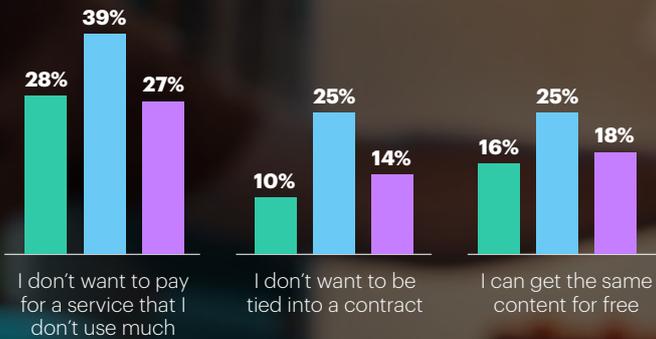
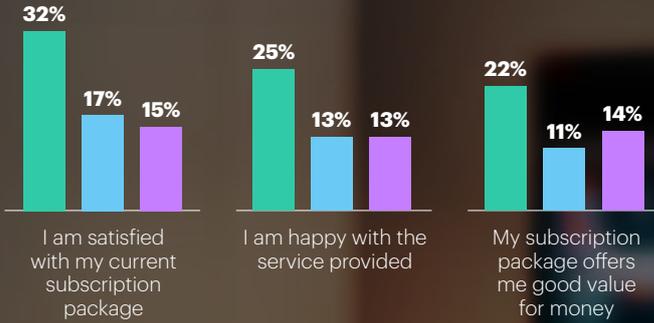
Continuers Potentials Cancelers

Notification

From messages:



1:45 pm



Notification

From messages:



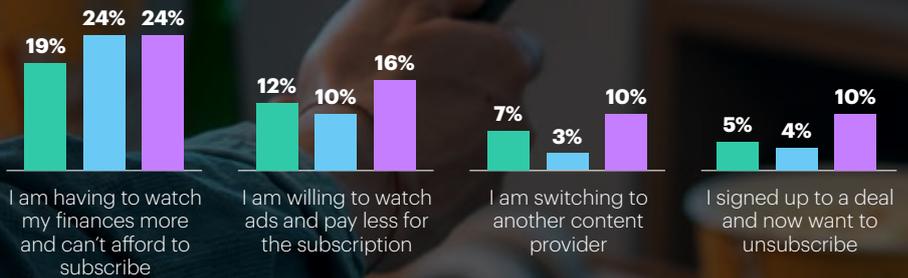
1:47 pm

Notification

From messages:



1:45 pm

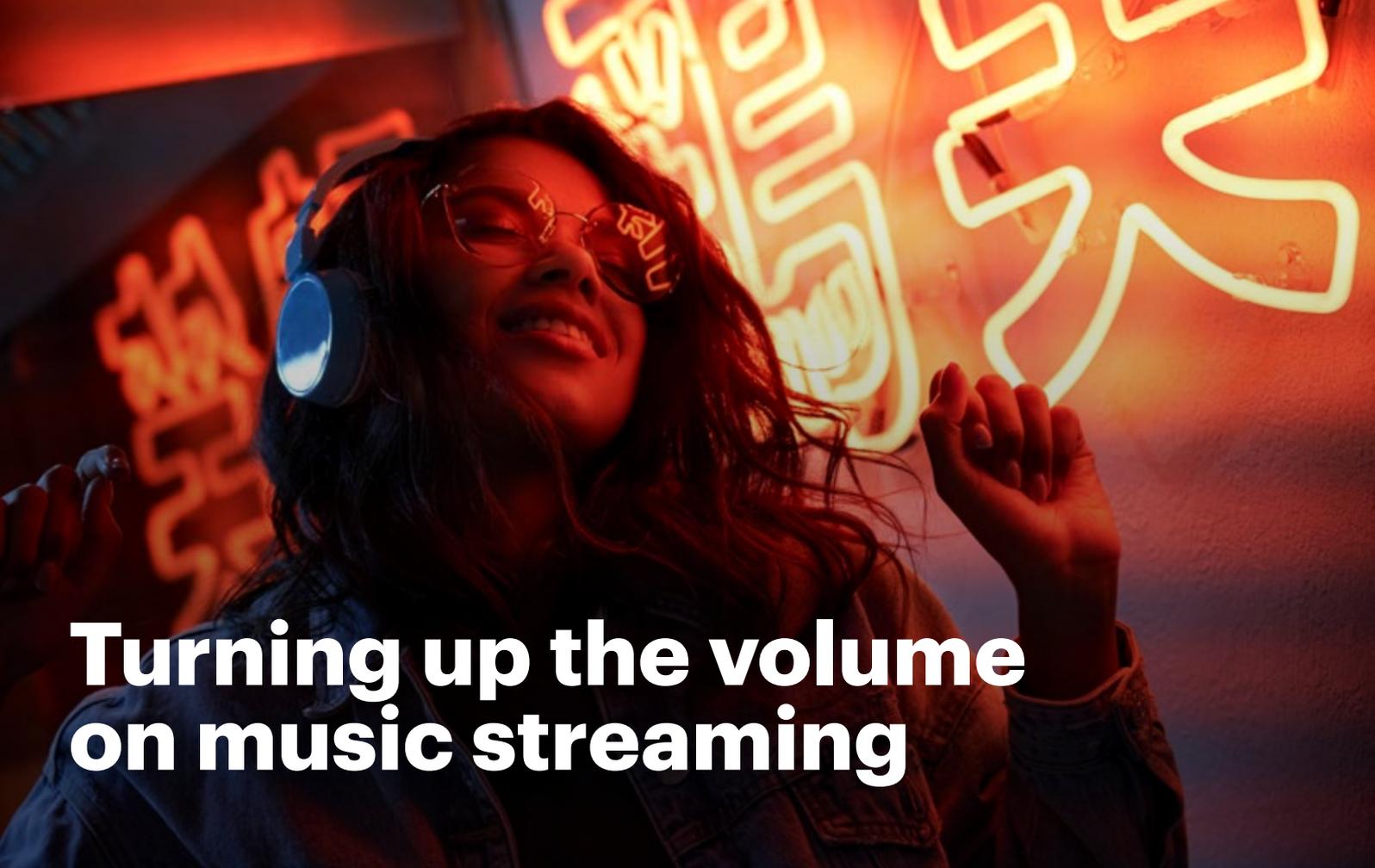


Q: Which of the following factors are likely to influence any changes to your subscription plans in the next 12 months?

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Speak to sales

Run a survey

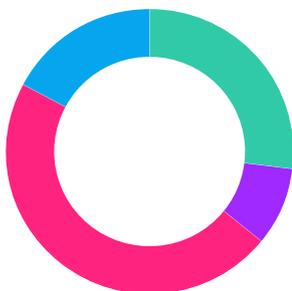


# Turning up the volume on music streaming

Music streaming remains popular across the regions, and like many other digital media streaming services, peaked during the pandemic. Whilst our data is predicting music streaming growth in the next 12 months, we are seeing a slight slowing down, with **23%** of global consumers predicting they will stream more music in the next 12 months compared to **28%** who increased their consumption in the previous 12 months.

Delving into paid-for music streaming subscriptions, YouGov research shows that just over a quarter of global consumers currently pay for music subscriptions and are likely to continue to do so in the next 12 months (**27%**). And almost a fifth (**17%**) are potential music stream subscribers stating they don't have a paid subscription and are considering signing up next year.

## Paid for video on demand subscription intention | Global total



<span style="color: #00A651;">●</span> Continuers		<b>27%</b>	<span style="color: #E91E63;">●</span> Rejecters		<b>47%</b>
<span style="color: #9C27B0;">●</span> Cancellers		<b>9%</b>	<span style="color: #00A651;">●</span> Potentials		<b>17%</b>

Less than one in ten (**9%**) globally are cancelers, who currently pay for but are likely to cancel music subscription services next year. And almost half (**47%**) globally do not currently pay for music subscriptions and are unlikely to convert in the next 12 months. But how do our music streaming subscription groups vary by age?

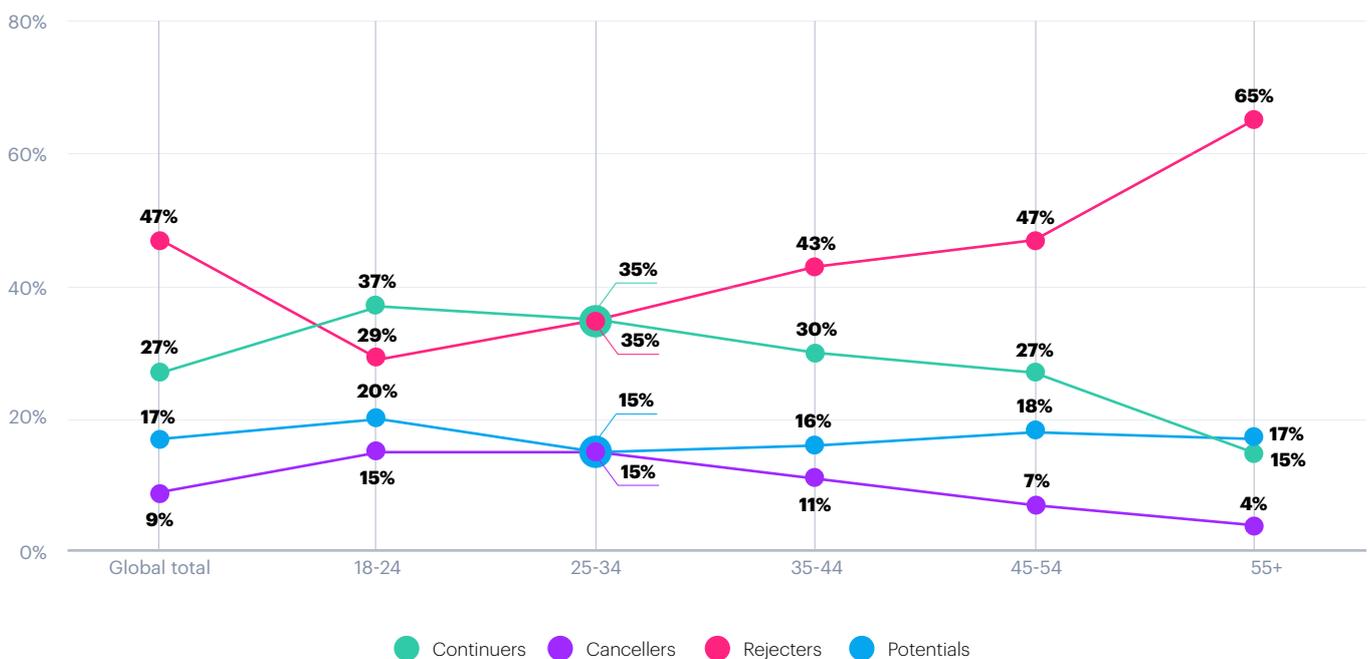
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Q: Which of the following best describes your subscription(s) to the following types of paid-for content services?  
Music streaming services

# Younger audiences more likely to stay tuned

More than a third of under 34s globally, intend to continue with their music streaming subscription service in the next 12 months and three in ten 35–44-year-olds are also planning on remaining loyal. Whilst 18–34-year-olds have a higher propensity to continue, **15%** are considering cancelling. Older age groups are the least likely to subscribe to music streaming services, with almost two thirds (**65%**) of over 55s currently not paying for a music subscription and are unlikely to subscribe next year.

**Paid for music streaming subscriptions intentions by age**  
Global total



Q: Which of the following best describes your subscription(s) to the following types of paid-for content services?  
Music streaming services



# Music streaming potential growth highest in Indonesia, Italy, and Poland

In the hometown of Spotify, **43%** of Swedes intend to continue subscribing to any paid for music streaming service in the next 12 months, boasting the highest proportion of continuers across the international markets surveyed. India and Denmark closely follow. The opportunity to convert non-subscribers to subscribe is highest in Indonesia, Italy, and Poland, where the proportion of those who currently do not pay for music subscriptions but may consider doing so in the next year are greatest.

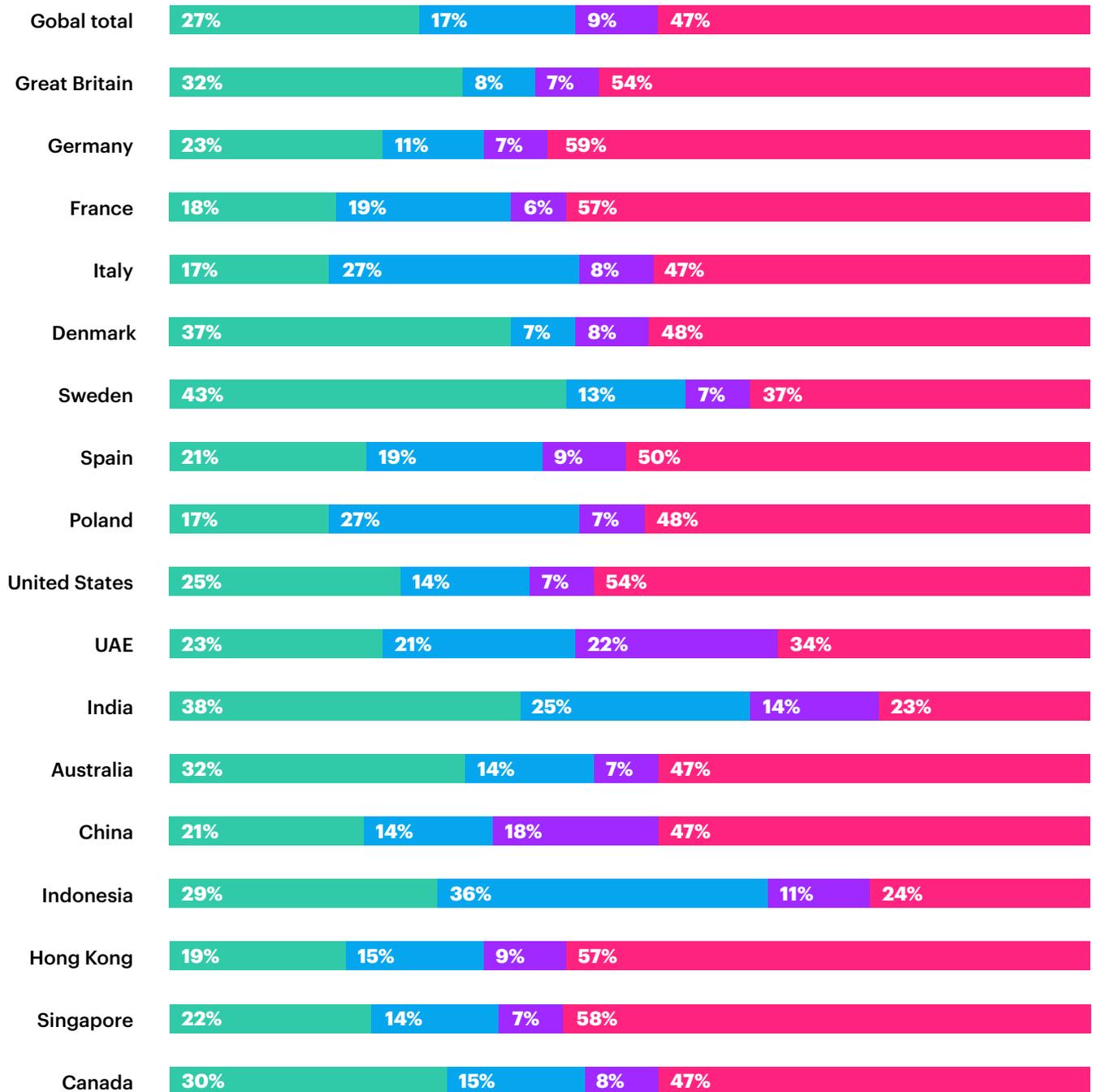
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## Paid for music streaming subscriptions intentions by country | Global

Continuers Potentials Cancelers Rejecters



Q: Which of the following best describes your subscription(s) to the following types of paid-for content services?  
Music streaming services

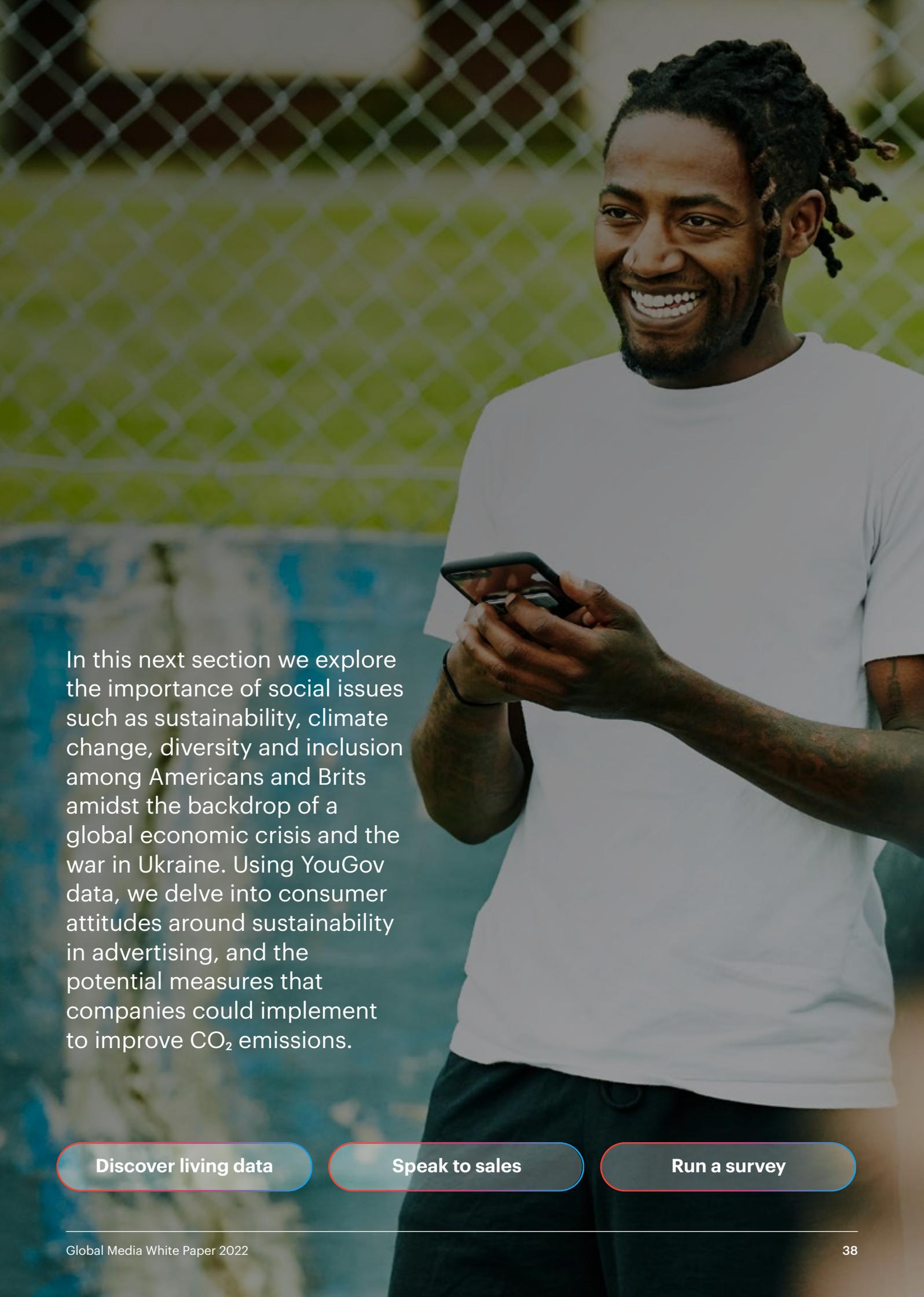
Exploring how the media landscape has evolved and where it might be heading will help guide marketers and advertisers to connect with global audiences now and in the future. But what else is important to consumers and what are they looking for from advertisers?

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PART - 4

# Sustainability in advertising

A photograph of a man with dark skin and dreadlocks, smiling broadly while looking at a smartphone in his hands. He is wearing a white t-shirt and dark pants. The background is a chain-link fence with a blurred green and blue area behind it. The image has a semi-transparent dark overlay on the left side where the text is located.

In this next section we explore the importance of social issues such as sustainability, climate change, diversity and inclusion among Americans and Brits amidst the backdrop of a global economic crisis and the war in Ukraine. Using YouGov data, we delve into consumer attitudes around sustainability in advertising, and the potential measures that companies could implement to improve CO<sub>2</sub> emissions.

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# Sustainability is centre stage

Recent YouGov research explored global issues that are impacting UK and US consumers and found that while the challenges that directly impact everyday lives such as the cost of living, war and health are top of consumers' minds, awareness of broader issues such as climate change, the importance of sustainability, social justice, and social responsibility are also core areas of concern for UK and US consumers.

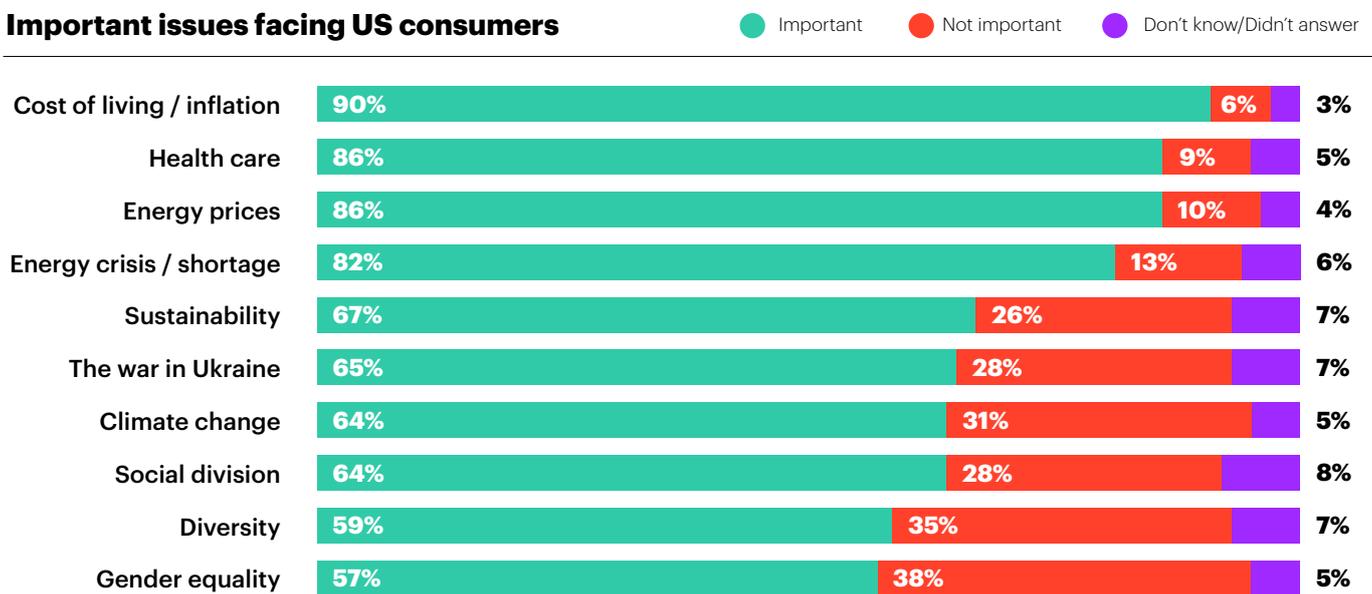
Our recent research shows that more than two thirds (**67%**) of Americans cite sustainability as an important issue, closely followed by climate change (**64%**). In addition, social

division, diversity, and equality are also important for more than half of US consumers.

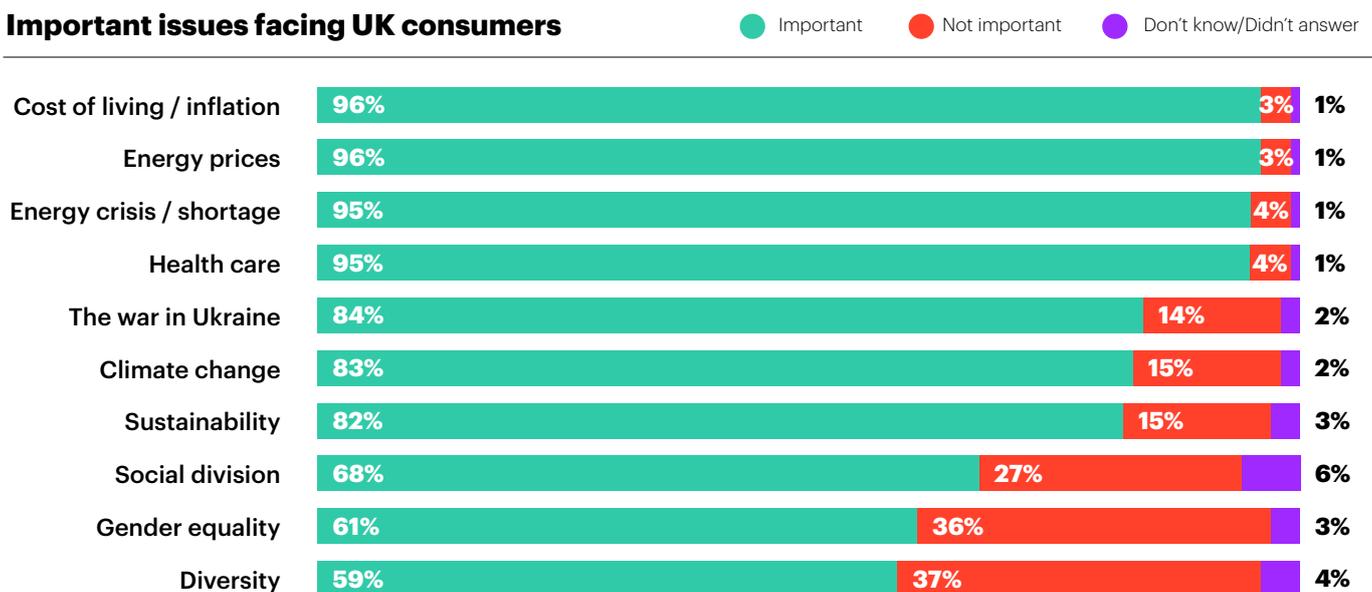
Looking at UK consumers, we see a similar picture around the topical areas of importance. More than eight in ten UK consumers consider climate change and sustainability to be important issues. In addition, almost seven in ten Brits consider social division important, and around six in ten consider gender equality and diversity important.

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## Important issues facing US consumers



## Important issues facing UK consumers



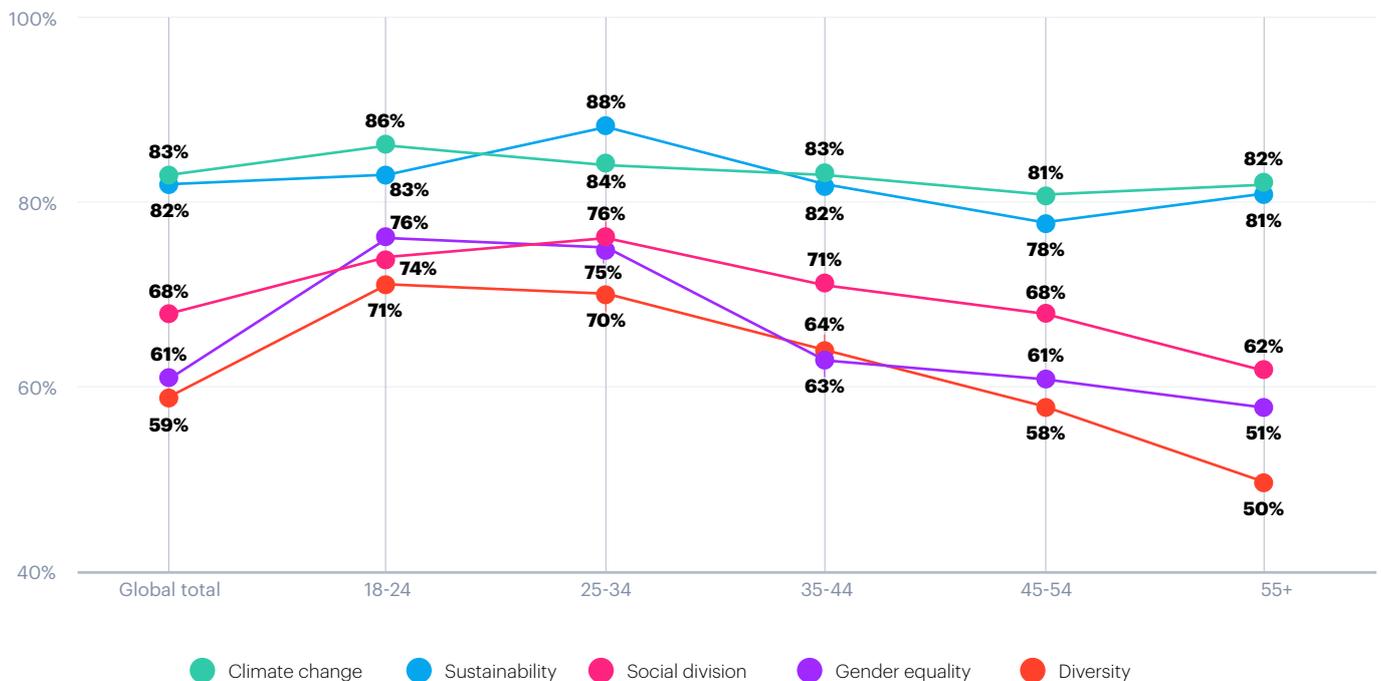
Q: How important are the following issues to you in the current situation?

# Environmental issues are high on the agenda for all ages

Looking at YouGov UK data by age, ecological and environmental issues are important to both older and younger age groups alike. More than eight in ten UK consumers, across all age groups, cite climate change as an important consideration and a similar pattern emerges for sustainability. On the other hand, socially conscious issues are higher on the agenda for younger Brits, with three quarters of under 34s considering gender equality to be important (compared to only half of consumers aged 55+), and seven in ten citing diversity as an important issue (vs. 50% of those aged 55+). This pattern was mirrored across our US audience.



**Important issues facing UK consumers by age**



Q: How important are the following issues to you in the current situation?

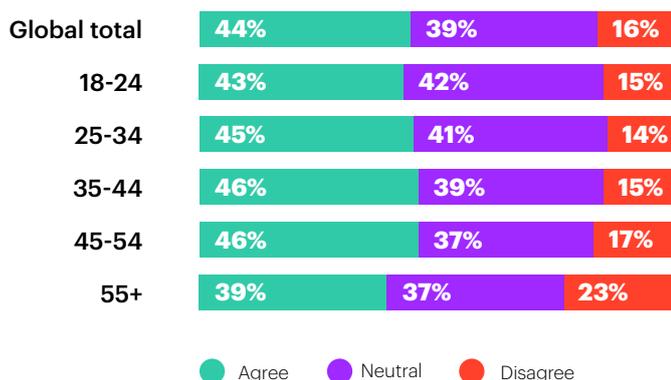
# Consumers seeking brands with a social conscience

With environmental issues and sustainability, a high priority, many consumers are choosing brands that are ethical, socially responsible, and eco-friendly. There is a growing appetite among consumers for products, services, brands, and media, that are socially responsible, and align with their values.

Turning to YouGov Global Profiles data, more than twice as many globally agree (**44%**) with the statement 'I try and buy only from companies who are socially responsible' compared to only **16%** who disagree, suggesting people want to buy from brands who are aiming to make the world a better place. This level of agreement is consistent across all age groups except for those aged 55+, which is slightly lower (**39%** agree).



## 'I try to buy only from companies who are socially responsible'



Across the globe, as consumers are expressing a growing connection with brands that are acting responsibly, more brands are embracing authenticity and becoming more transparent and proactive in the way they communicate their environmental priorities through their marketing and advertising messages and initiatives.

Q: Do you agree or disagree with the statement 'I try to buy only from companies who are socially responsible'

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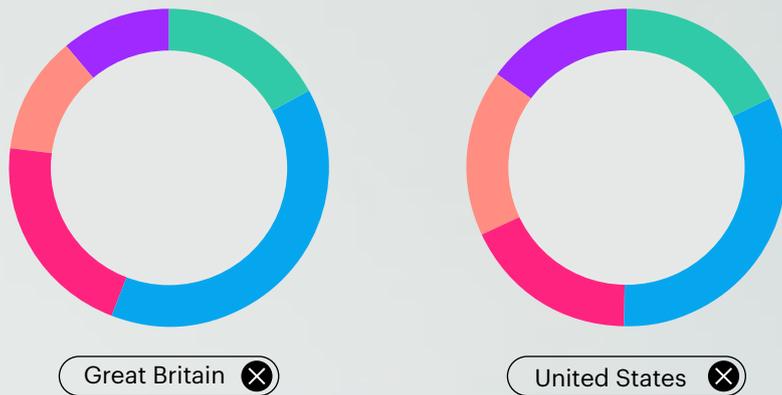
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# The importance of sustainability in advertising

Using recent YouGov research data in the UK and US, we explored the importance of sustainability in advertising and if consumers are concerned about the environmental impact of both the production, and delivery of advertising. Significantly, **56%** of Brits and **51%** of Americans state that sustainability in advertising is important to them, compared to only a third who do not consider it important.

## 'How important is sustainability in advertising to you?'



17%	Very important	18%
39%	Somewhat important	33%
21%	Not very important	18%
12%	Not at all important	17%
11%	Don't know / no answer	15%

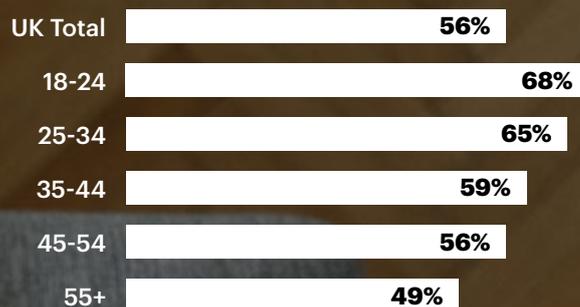
As consumers increasingly embrace environmental and social causes and seek out products and businesses that align with their values, this is extending to the advertising of those brands. Advertisers and publishers will need to prepare to address the rising concerns of the impact of the advertising industry on the environment, this is not restricted to in-print newspapers and magazines, but also the digital ecosystem, since the infrastructure of the internet is a significant contributor of greenhouse gas emissions.

*Q. The following is about sustainability in brand advertising. Here we mean both sustainable aspects in the production of the advertising medium as well as the advertising medium itself, for example whether advertising is conveyed digitally and consumes electricity in the process or is printed and distributed on paper. How important is sustainability in advertising to you?*

# Younger consumers place greater importance on sustainable advertising

Younger generations will be the driving force for reducing the carbon footprint of the advertising industry. In the UK, **68%** of consumers aged 18–24, and **65%** aged 25–34 consider sustainable advertising of greater importance than older consumers. This acknowledgement among younger generations is also mirrored in the US with younger consumers over indexing on the importance of sustainability in advertising compared to those aged 55+.

## % Net importance of sustainability in advertising | UK



*Q. The following is about sustainability in brand advertising. Here we mean both sustainable aspects in the production of the advertising medium as well as the advertising medium itself, for example whether advertising is conveyed digitally and consumes electricity in the process or is printed and distributed on paper. How important is sustainability in advertising to you?*

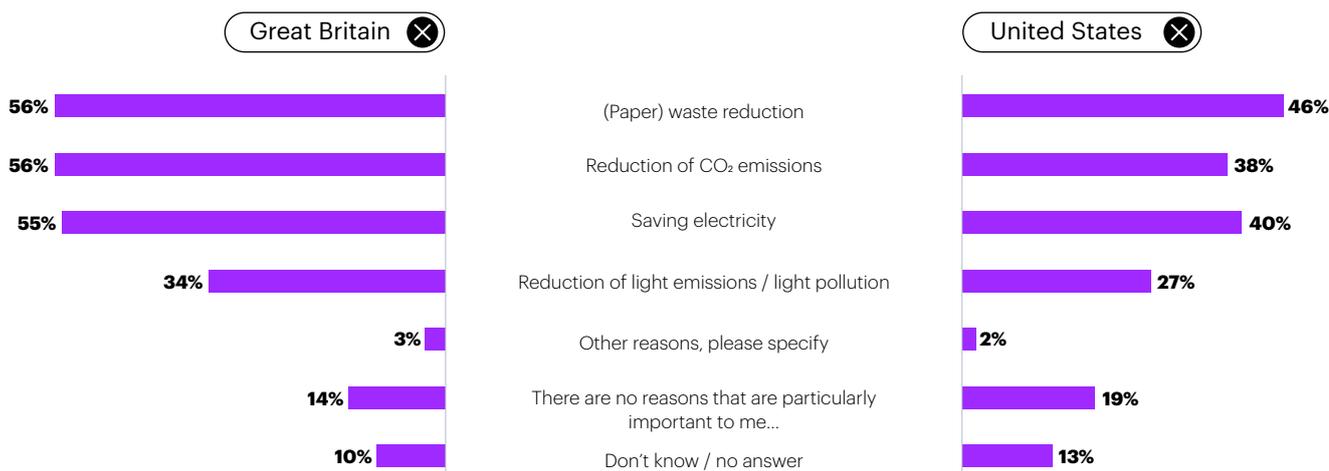
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# A new era of advertising sustainability

Consumers are recognizing the need for the advertising industry to improve its carbon footprint, but what aspects of sustainability do they consider important? Our data shows that consumers in the UK and US consider the reduction of paper waste, CO<sub>2</sub> emissions, and saving electricity as the top three priorities for the advertising industry, closely followed by the reduction of light emissions.

Measurement and reporting are key for the advertising industry, and it is increasingly important for brands, advertisers, and publishers to communicate and validate their environmental credentials to ensure consumers are aware of the actions they are taking to improve its carbon footprint.

## Sustainability factors of importance in the advertising industry



Q: Which aspects, if any, are particularly important to you when you think about sustainability in the advertising industry?

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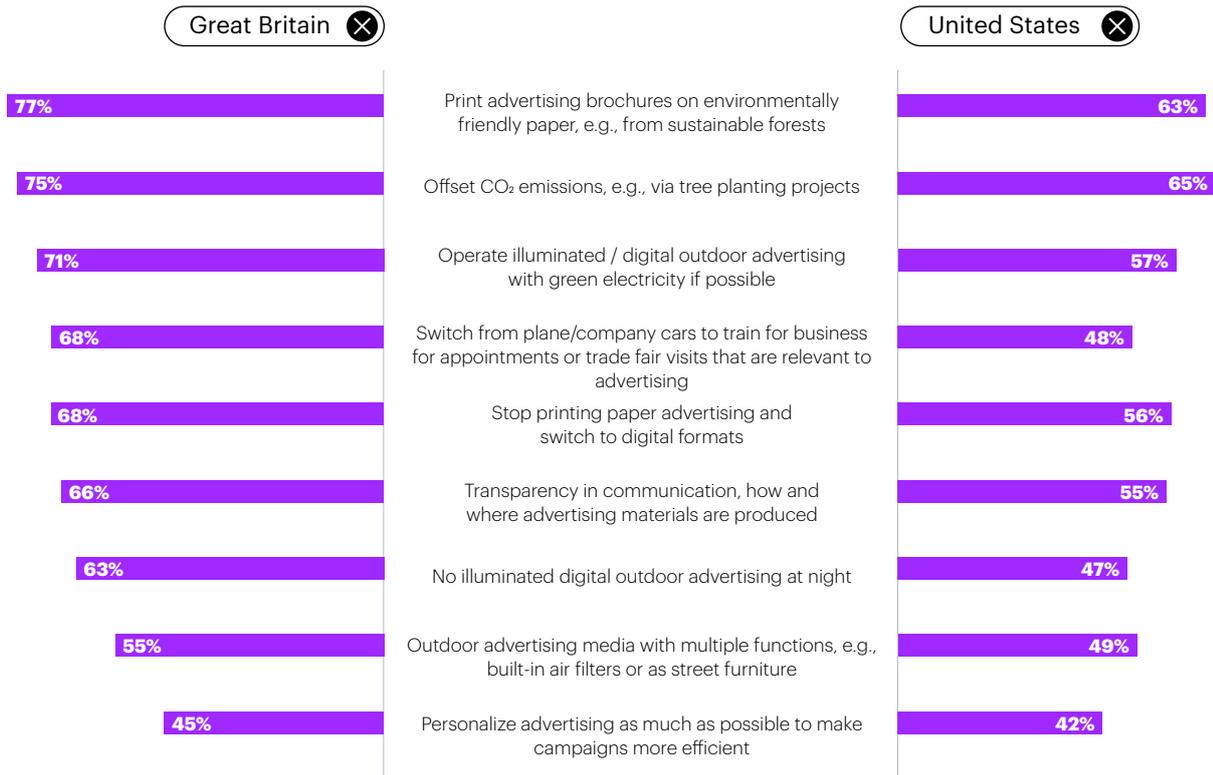
# Call for action on CO<sub>2</sub> emissions

Our UK and US data also explored the importance of various measures that companies could implement in advertising to improve CO<sub>2</sub> emissions. High on the priority list for two thirds of Americans, and three quarters of Brits is offsetting CO<sub>2</sub> emissions via restoration projects, such as tree planting. Similar proportions consider the use of environmentally friendly paper e.g., using sustainable forests, an important consideration. Using green electricity for digital Out of Home Displays ranked third in importance, closely followed by replacing print advertising with digital. Communicating the positive or negative environmental impact in the advertising industry is important in order to build trust. Two thirds of Brits and more than half of Americans seek transparency in how and where advertising materials are produced.

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## % Net importance of measures that companies could implement in advertising to save CO<sub>2</sub> emissions



Q: Which aspects, if any, are particularly important to you when you think about sustainability in the advertising industry?

Switching to alternative methods of travel to help reduce CO<sub>2</sub> emissions is also considered important for more than two thirds of Brits, and almost half of US consumers. With global sustainability a high priority for many consumers and concerns rising about the impact of advertising on the

environment, consumers are seeking brands, advertisers, and media organizations to focus on sustainability, reduce emissions, and be transparent about the contributions they are making to environmental conservation.



# Summary



As the on-going impact of the pandemic and the economic crisis continues to influence how media is consumed, it is important to look ahead, and explore which media are going to stick, which will grow, and what the future landscape will evolve into. In addition, social issues such as sustainability and climate change remain a key concern and consumers are considering the brands, advertisers, and media channels they want to be aligned with, and the impact they have on the environment.

The key take-outs from our global media study are summarized below:

**Media levelling out:** We predicted last year that following the surge in media consumption throughout the pandemic we would see high levels of global consumers sticking with their media choices. This has proved to be the case in this year's research with annual media penetrations remaining high and stickiness scores for all media remaining consistent.

**Digital and in-person experiences leading growth:** In-person media activities registered the highest

decline in the last 12 months, but we are starting to see renewed confidence in returning to physical media activities. Among those who have already engaged in live events and attended the cinema in the last 12 months, the growth opportunities are evident. Our global growth driver scores for both cinema and events, top the list alongside streaming music and video. This appetite to 'do more' is encouraging for both sectors, but the challenge for the events and cinema sectors is to plan for growth as cautious consumers gradually return.

**Media growth convergence:** When looking at media consumed in the last 12 months, we witnessed a polarization in 'net growth scores', with digital activities at the top end of the scale (+30%), and cinema at the bottom (-22%). However, in the next 12 months, this polarization is set to diminish, as the 'net growth scores' for all media activities converge, with digital growth in consumption declining, and in-person media activities on the increase. This provides useful pointers for media planners assessing the media mix in the year ahead.

**Non-linear media driving growth in audio and visual media:** Streaming video or music and listening to podcasts are predicted to grow at a higher rate than linear media such as listening to the radio and watching live and non-live TV. More traditional media activities continue to benefit from high consumption penetrations, but their rate of growth is lower than digital. While younger audiences are fuelling the growth in these mediums, stickiness amongst those consuming remains high across all demographic groups.

**Subscription reset:** Subscription video on demand (SVOD) surged during the pandemic but appears to be slowing as life slowly returns to normality. While a quarter intend to increase their streaming in the next 12 months it's at a lower rate than the previous year, suggesting growth is plateauing. For those wanting to continue their subscription, a high level of satisfaction with the service is balanced by a desire to not pay for a service they wouldn't use, suggesting their SVOD provider is catering to their entertainment needs. Fierce competition, multiple subscriptions, free trials, price hikes, and the delivery of new content create tough challenges for providers to win and maintain subscribers.

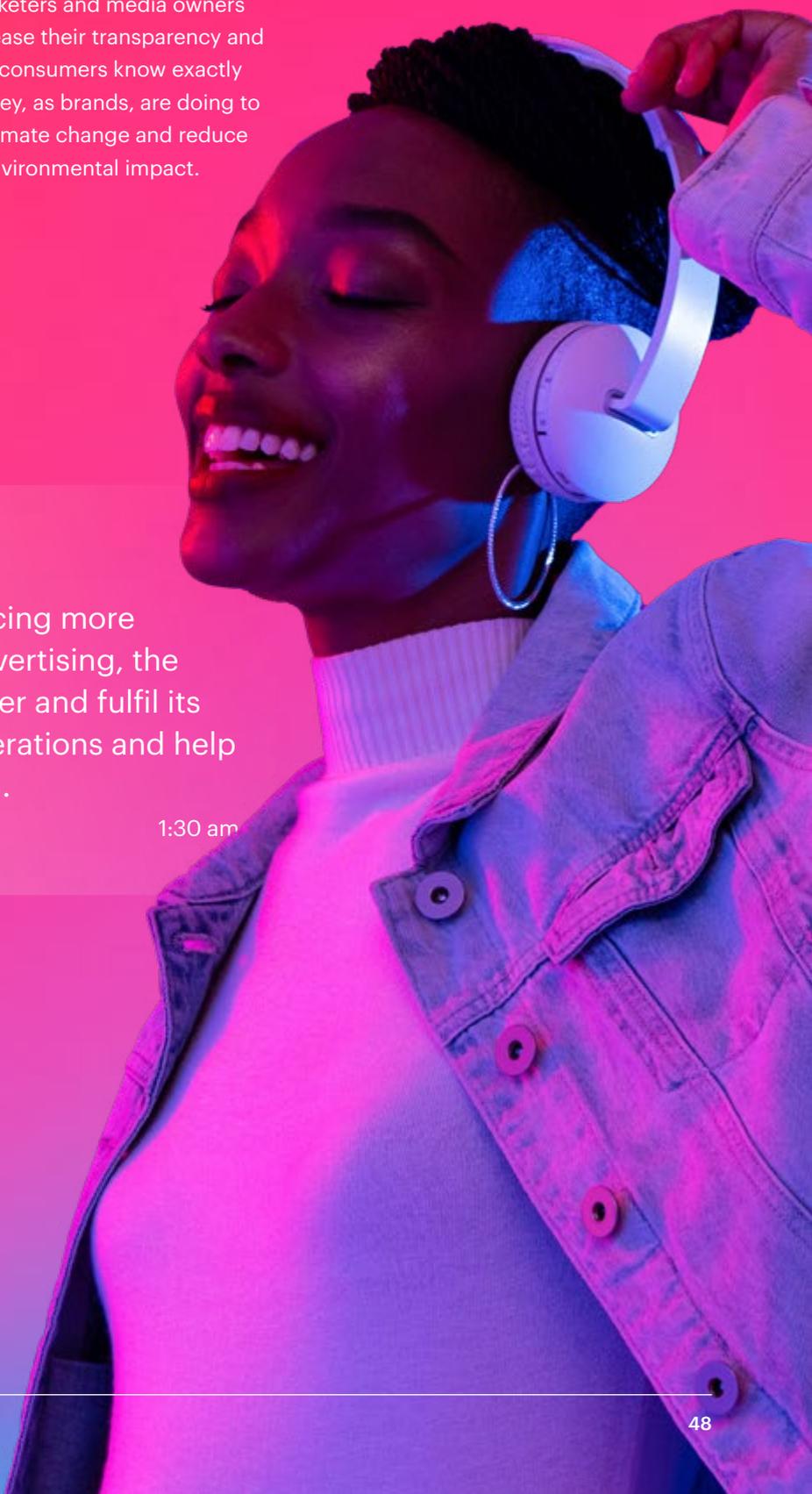
**A new era of green advertising:** Media plays a significant role in consumers lives and needs to adapt to the changing needs of its audience. With sustainability a high priority for US and UK consumers, brands, advertisers, and media channels must prepare to address the rising concerns about the impact of ads on the environment. This presents a clear opportunity for marketers and media owners to increase their transparency and ensure consumers know exactly what they, as brands, are doing to fight climate change and reduce their environmental impact.

#### Notification

With younger generations placing more importance on sustainable advertising, the industry needs to work together and fulfil its responsibilities for future generations and help deliver sustainable advertising.

1:30 am

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# Methodology

The insights in this report are drawn from a recent global Custom survey on the Global media sector, specifically past media consumption patterns and the future global media landscape, covering 18 global markets of more than 19,000 respondents. Our survey was fielded the week of 10th August to 25th August 2022. Our survey results were further bolstered by **YouGov Daily Omnibus** research conducted in the US and UK amongst 3301 respondents between 14-15th September 2022 to explore attitudes to sustainability in advertising. The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted using a mild weighting team using interlocking demographic characteristics—methodology considered advanced in the market research space. For this report series the following population representation was used:

Region	Market	Population sampled representation	Sample Size (n=)
North America	US	National representative - 18 years of age +	<b>1,707</b>
North America	Canada	National representative - 18+	<b>1,013</b>
North America	Mexico	National (Urban focus) - 18+	<b>1,056</b>
Europe	GB	National representative - 18+	<b>2,008</b>
Europe	France	National representative - 18+	<b>1,009</b>
Europe	Germany	National representative - 18+	<b>1,068</b>
Europe	Spain	National representative - 18+	<b>1,006</b>
Europe	Denmark	National representative - 18+	<b>1,019</b>
Europe	Italy	National representative - 18+	<b>1,012</b>
Europe	Poland	National representative - 18+	<b>1,005</b>
Europe	Sweden	National representative - 18+	<b>1,027</b>
APAC	Australia	National representative - 16+	<b>1,029</b>
APAC	China	National Online - 16+	<b>1,033</b>
APAC	Hong Kong	National Online - 18+	<b>513</b>
APAC	Indonesia	National Online - 18+	<b>1,062</b>
APAC	India	National Online (Urban only) - 18+	<b>1,002</b>
APAC	Singapore	National representative - 18+	<b>1,066</b>
MEA	UAE	National representative - 18+	<b>1,081</b>

For further information or for any questions about the data used in this report, please **[get in touch](#)**.

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# Thank you

YouGov is an international research, data and analytics group. We have been building an ever-growing source of consumer data for over **20** years, creating the richest and most complete understanding of your customers' complex lives. We call it living data. Understand what **22 million+** registered panel members in over 55 markets are thinking, on over a million - and growing - data points. Re-Contact and dig deeper to explore, plan, activate and track marketing activity with certainty, at speed, every time.

## **Living Consumer Intelligence.**

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