

A photograph of a man and a young girl lying on a dark, textured surface, possibly a rug. The man is on the left, wearing a light blue shirt, and is holding a dark tablet. Both are smiling and looking towards the camera. The background is a dark, textured surface.

YouGov®

MEDIA AND CONTENT WHITE PAPER

Global media outlook report 2022

yougov.com/media-content

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Digital, as we know it today, now sits at the heart of enabling contactless experiences. The risks and restrictions associated with in-person interactions, largely as a result of the pandemic, have meant we continue to see **day-to-day consumer routines dramatically impacted - from work to shopping, to entertainment and socialising, to engagement with different types of media.**

Globally, as some traditional media were hit by lockdown restrictions and changing work routines, many pre-pandemic digital media trends accelerated. We have witnessed a significant increase in the use of on demand TV streaming services such as **Netflix and Amazon Prime, as well as the younger generations driving a rise in the popularity of podcasts.** On the other hand, as routines have been disrupted by the pandemic, a proportion of radio listeners who traditionally listened out of home (in the car, at work, or when travelling) have reduced their listening behaviour.

This report takes deep dives into the Watch, Listen, Read and Social channels of media consumption. Within the report, we unveil past and present consumption levels for the most relevant media across different demographics, with a particular focus on the US and Great Britain. As consumer media consumption patterns continue to evolve and adapt to the pandemic-caused disruption across different regions, YouGov data sheds light on media growth opportunities for media planners and brand marketers alike, whilst also revealing which digital trends are likely to stick around in the future, and which global markets and demographics are encouraging this stickiness. The study combines YouGov deep dive custom research across living data from multiple products, including **YouGov Custom Research, in 17 international markets and YouGov syndicated Profiles data with specific focus on the US and GB.**

Is the strong foothold of TV news weakening?

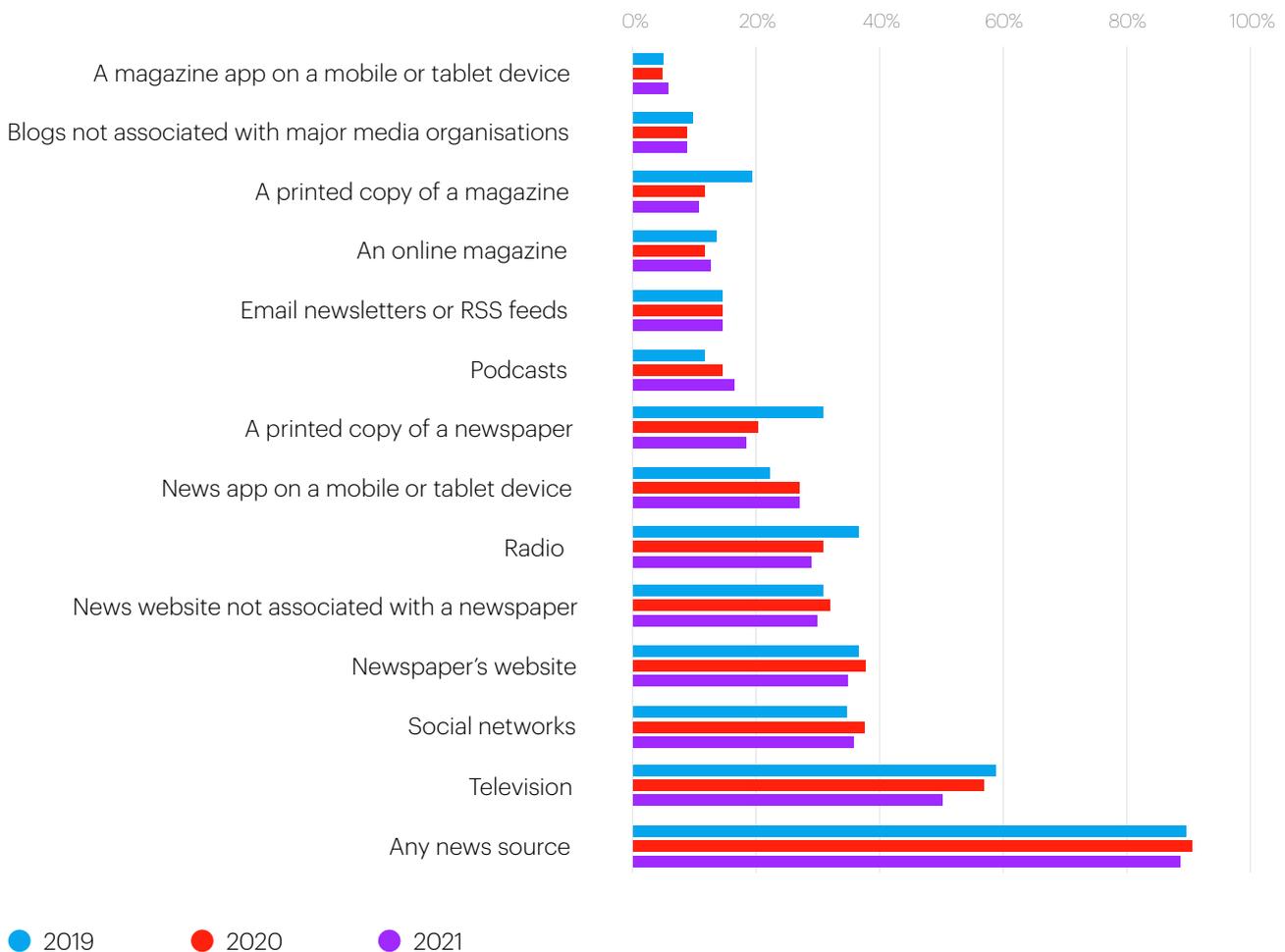
Before we explore media consumption patterns across the regions, this first section explores how news consumption has changed over the last three years within the US and GB. Over the past couple of years, an unparalleled level of news has been delivered across the world, centred around the COVID-19 health crisis as it unfolds.

The pandemic has both disrupted and transformed how news is gathered and digested. News consumption across the world experienced an increase at the start of the pandemic, but for some consumers, it eventually led to news fatigue. In the US, the proportion of adults consuming news increased marginally from 93% in 2019 to 94% in 2020 fuelled by both the pandemic and the presidential election, and then dropped back to pre-pandemic levels in 2021. Whilst overall news consumption penetrations have remained steadily high over the last three years, traditional media sources (TV, radio, and print) have experienced consistent decline, suggesting a gradual shift to digital news sources.

Television in the US, for instance, has maintained its stronghold as the main source of news for Americans over the last three years, the pandemic helped slow a downward trend, with TV news penetrations in the US falling slightly in 2020, and then dropping more significantly in 2021. Most digital news sources increased penetration between 2019 and 2020, and then dropped to pre-pandemic levels in 2021, except for podcasts which have continued to grow in popularity. In 2021, social networks and newspaper websites (in second and third place) are almost at equal levels with a third of Americans using them for their source of news.



Sources used to access news (US)



Q: Which, if any, of the following sources do you use to access news?

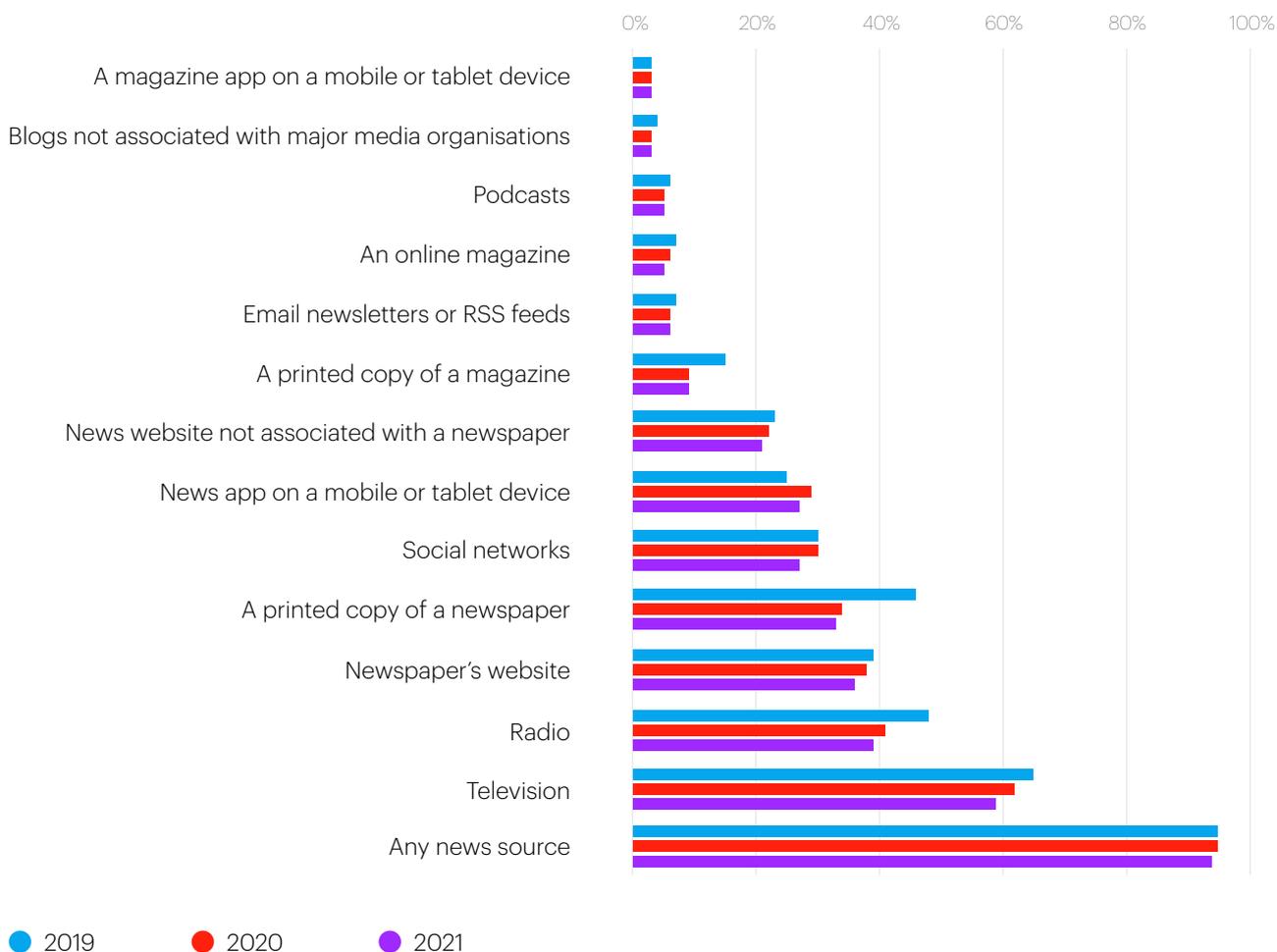


The pandemic effect on news consumption

Trends in news consumption in Great Britain are similar to those seen in the US. In terms of individual media types, whilst TV remains the dominant news source, traditional media registered the largest downturn in news consumption

in GB between 2019 and 2020 (particularly radio, and printed newspapers and magazines). This decline slowed in 2021, suggesting the pandemic may have stabilized a downward trend for traditional news sources.

Sources used to access news (GB)



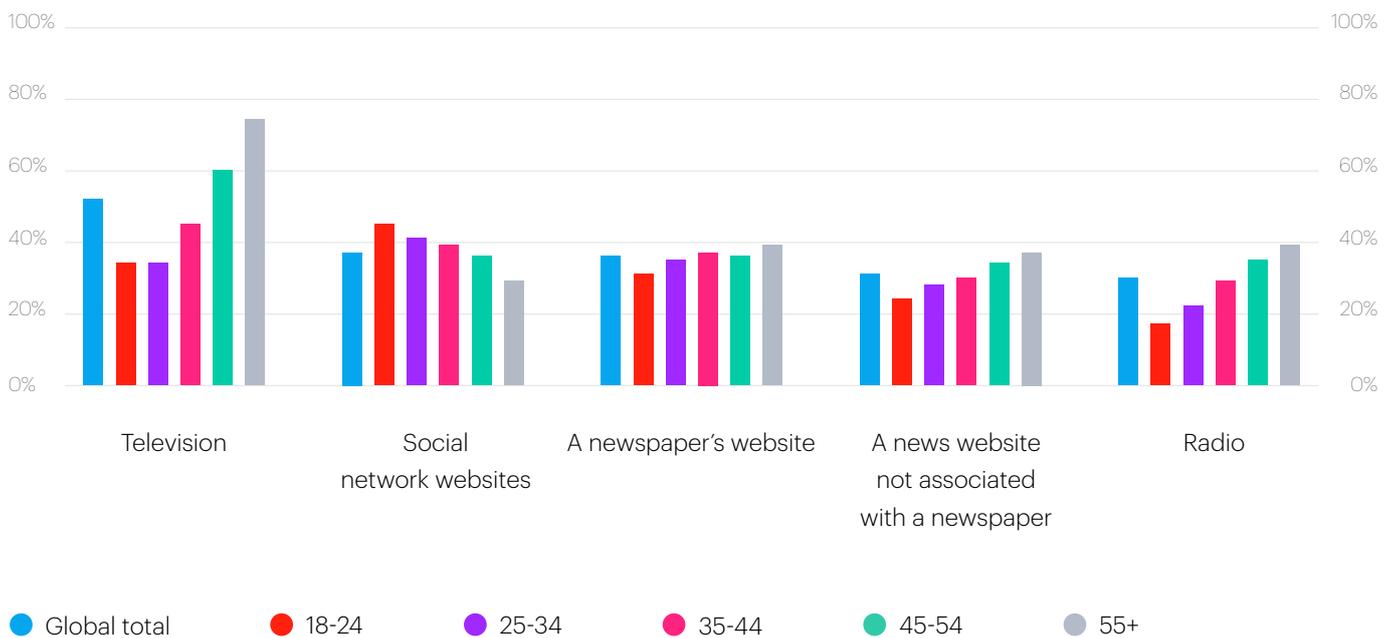
Q: Which, if any, of the following sources do you use to access news? Please select all that apply.

Social media is Gen Z's top news source

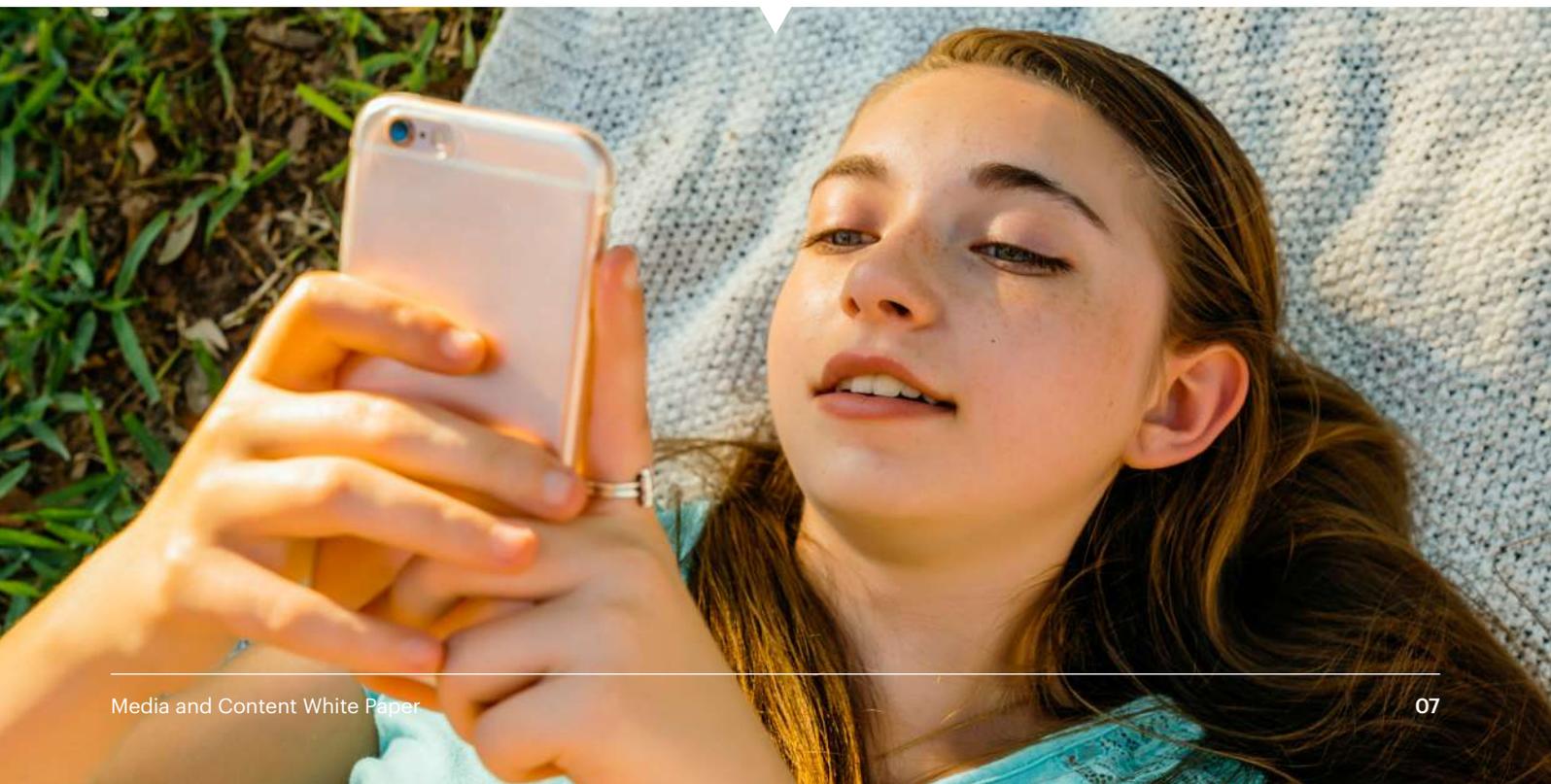
Interestingly, there are clear demographic differences for the top news sources used in 2021. In the US, television is significantly more popular among adults aged 45+ along with radio and news websites, whereas for the Gen Z cohort (those aged 18-24) and younger

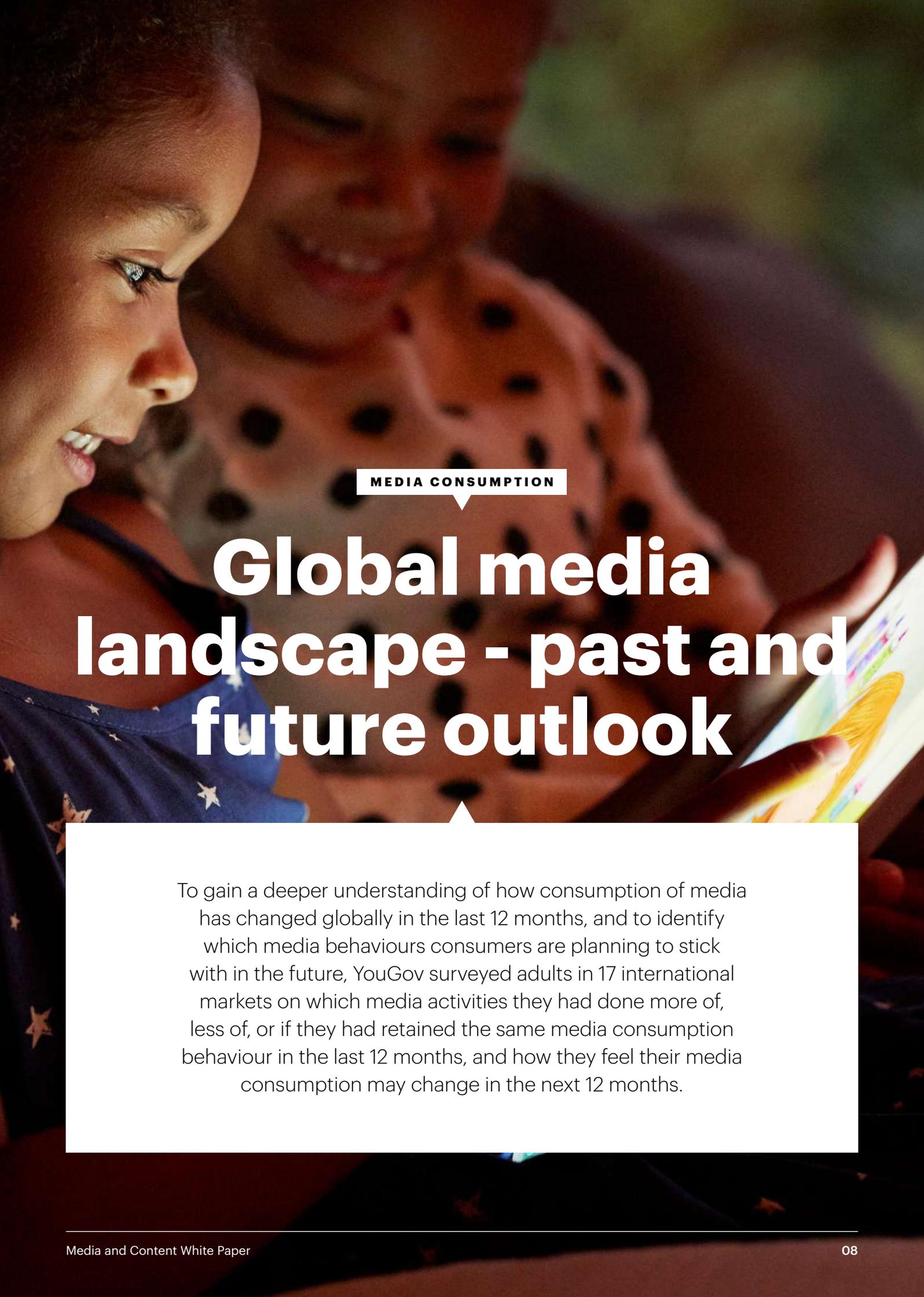
millennials aged 25-34, social media is the top news source ahead of TV. This trend is mirrored in GB where social media news penetration reached 41% among those aged 18-24, followed by TV (33%).

Top 5 sources of news by age (US)



Q: Which, if any, of the following sources do you use to access news? Please select all that apply.



A young girl with dark hair and a blue star-patterned shirt is looking at a tablet held by a woman wearing a red polka-dot top. They are both smiling and looking at the screen. The background is softly blurred.

MEDIA CONSUMPTION

Global media landscape - past and future outlook

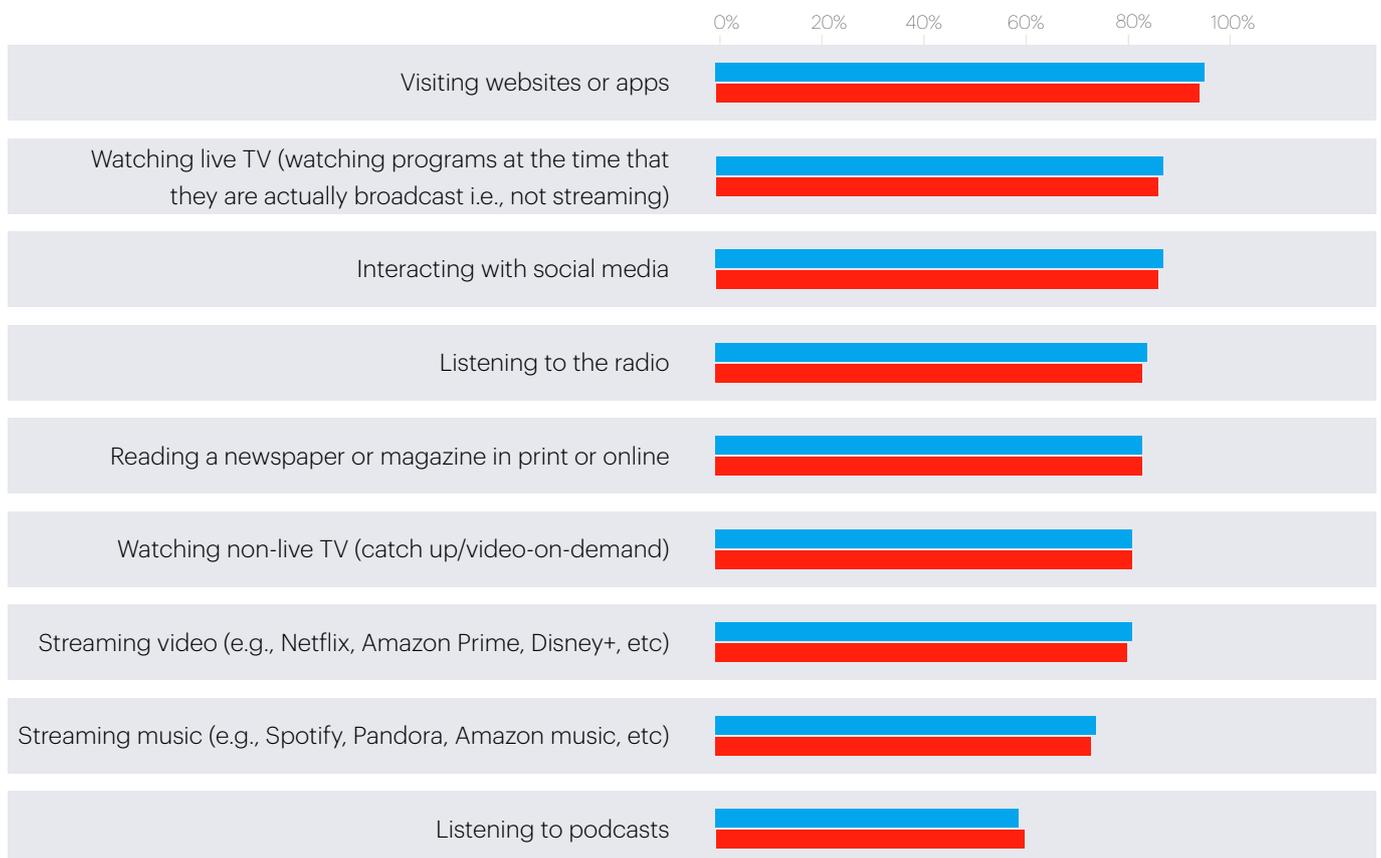
To gain a deeper understanding of how consumption of media has changed globally in the last 12 months, and to identify which media behaviours consumers are planning to stick with in the future, YouGov surveyed adults in 17 international markets on which media activities they had done more of, less of, or if they had retained the same media consumption behaviour in the last 12 months, and how they feel their media consumption may change in the next 12 months.

Annual media consumption penetrations remain high

The results reveal that websites or apps are the dominant media choice. More than nine in ten (95%) of all adults globally claimed to have visited websites/apps in the last year, and a similar proportion intend to use websites/apps in the next 12 months. Watching live TV (e.g., watching programs at the time that they are broadcast) is ahead of video streaming, with annual penetration levels on a par with those who interacted with social media. Whereas watching non-live TV (catch-up or video on demand) is slightly ahead of using video streaming services such as Netflix and Amazon Prime, but behind listening to the radio.

More than four in five listened to the radio globally, whereas three quarters streamed music. Whilst annual podcast consumption has not quite reached the penetration levels of other media counterparts, an impressive three in five global consumers claimed to have listened to podcasts in the last year or intend to do so in the next 12 months. Looking ahead, podcasts are the only media type registering a higher projected annual consumption in the next 12 months, compared to the previous year.

Media types consumed in last 12 months/plan to consume in next 12 months (Global)



● 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?

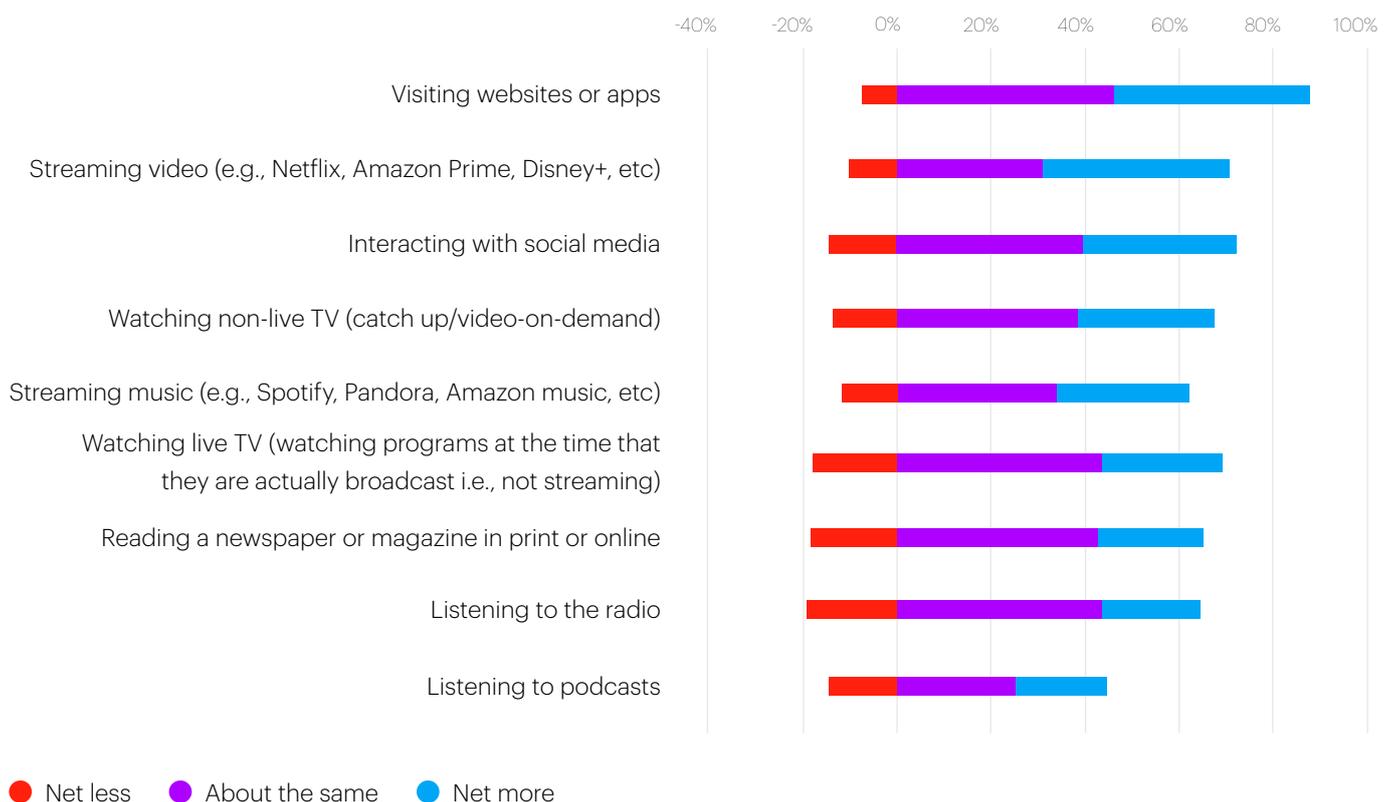


Digital media consumption is outpacing traditional media

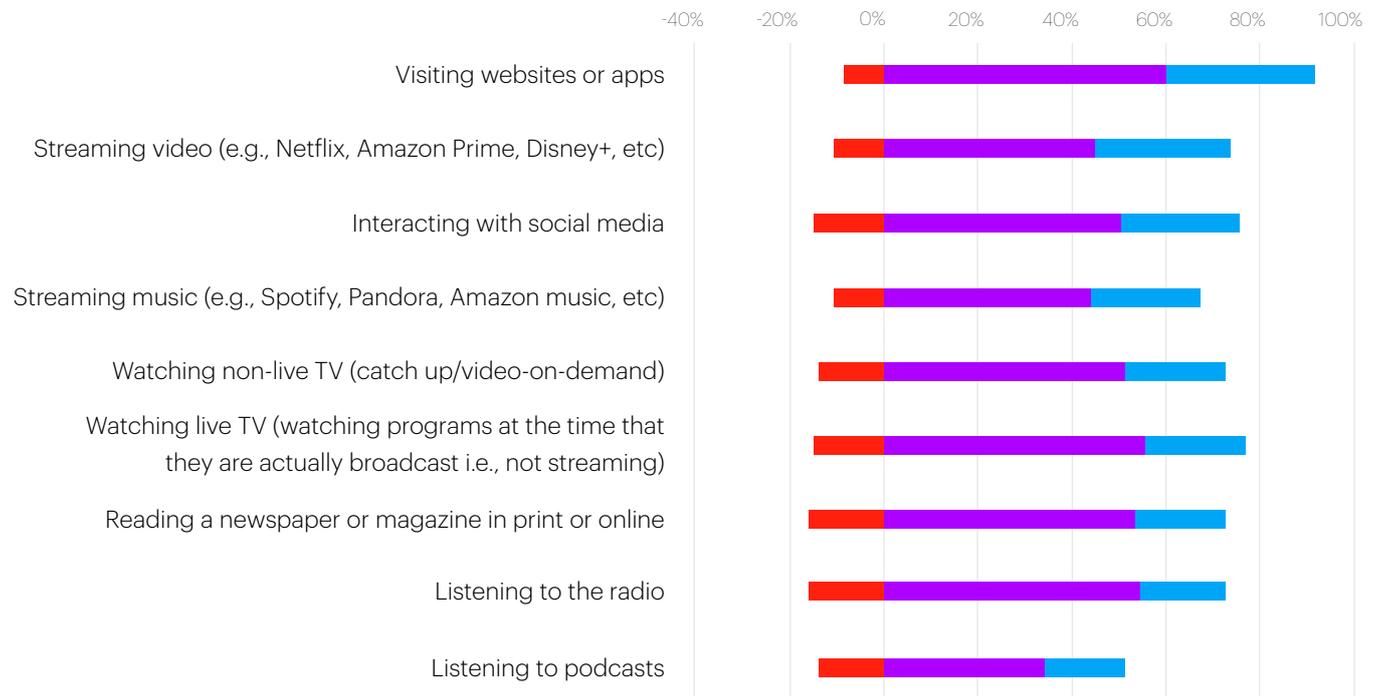
In the last 12 months, a higher proportion of all global consumers claimed to have increased their consumption of websites/apps, social media, and streaming video services than more traditional media such as TV or radio. The media type showing the highest growth was online consumption of websites/apps, with 42% of global consumers claiming to have increased consumption in the last 12 months. On the other hand, a higher proportion of global consumers claimed to have decreased their consumption of traditional media in the last 12 months with 19% consuming less radio, 18% reading fewer newspapers or magazines, and a similar proportion watching less live TV. The pandemic fuelled a

surge in media consumption over the last 12 months, and in the coming 12 months, our data suggests a 'levelling out' in consumption. The proportion of global adults expecting to increase consumption is slowing, whereas the proportion of adults likely to consume about the same of each media type is increasing. Despite this 'levelling out', consumers expect to spend more time with digital media than any other type of traditional media. Among these projected increases in digital media sources are websites and apps (29% of global consumers are likely to increase their consumption) followed by streaming video (27%) and social media (24%).

Media activities have done more, less or the same in last 12 months (Global)



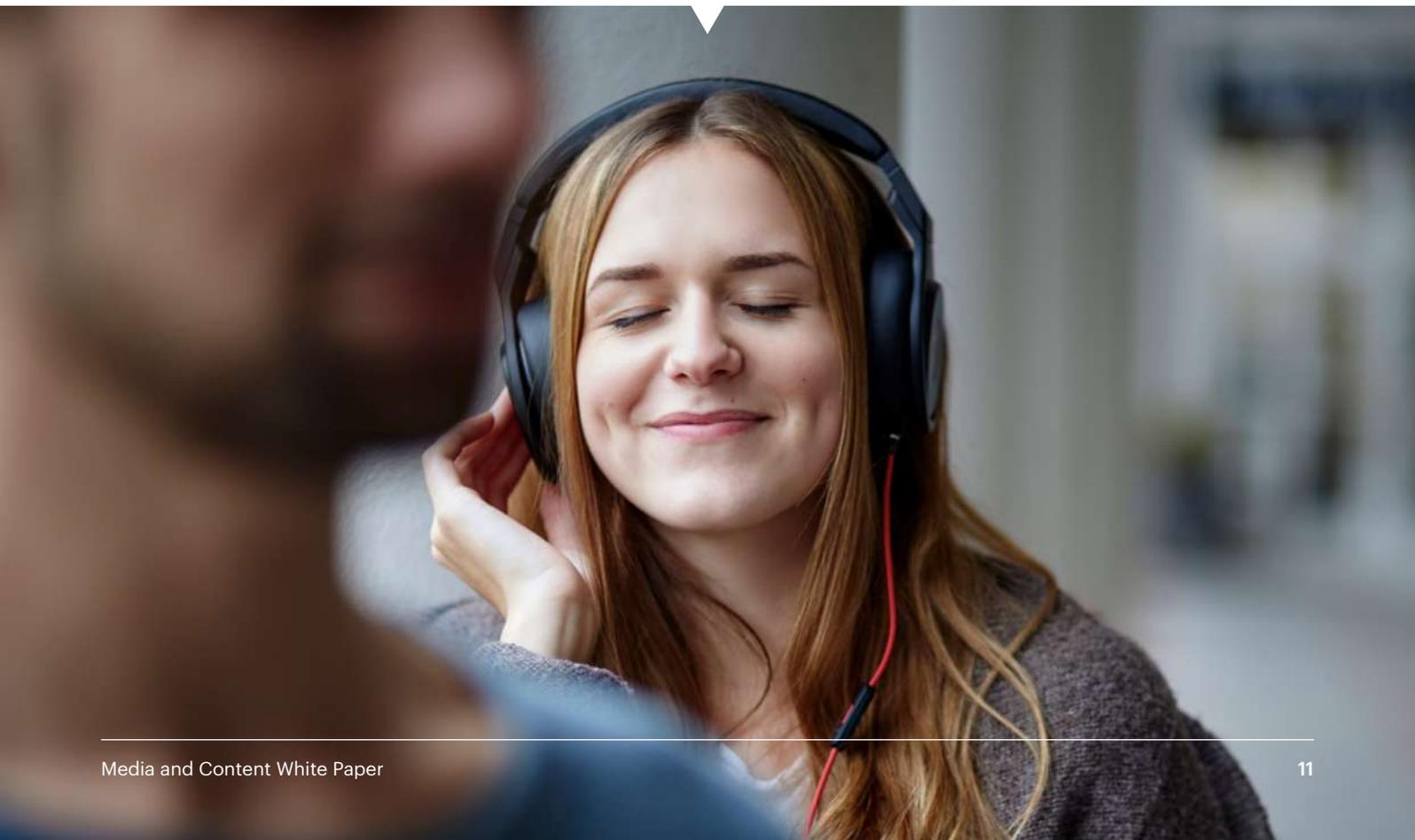
Expected media consumption in next 12 months (Global)



● Net less ● About the same ● Net 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?



Key changes in global media consumption

1 Online streaming experienced the highest growth in watched content

Undoubtedly, the pandemic has contributed to the accelerated growth in the amount of video streaming in the last 12 months as millions of people went online for their entertainment whilst lockdown restrictions swept the world. Across the 17 international markets surveyed, two in five adults claimed to have used more video streaming services in the last 12 months, and just under a third (27%) intend to use more in the next 12 months, with 42% expecting their video streaming behaviours to remain the same.

3 Music streaming is driving audio consumption

Looking at consumption of audio media, the pandemic has clearly fuelled a global growth in streaming music in the last year. Furthermore, in the next 12 months, the proportion of global consumers likely to increase their music streaming overtakes live TV in terms of anticipated growth in consumption. On the other hand, the proportion of global consumers registering an increase in their radio listening last year, and a likely increase in the next 12 months, is slightly lower than other types of traditional media. With daily routines disrupted due to lockdowns and an increase in working from home, radio listening has declined. Consequently, radio registered the highest proportion of global consumers claiming to have decreased their radio listening in the last 12 months, and plan to listen to less in the next 12 months. Turning to podcasts, we have already seen that annual penetrations are lower than other media types across the 17 international markets surveyed. In other words, a higher proportion of the global population did not consume podcasts last year, and do not intend to do so in the next 12 months compared to other media types. Consequently, the proportion of all global consumers likely to increase their consumption of podcasts is also lower. However, in the next section we explore the outlook of consumption among those already actively involved in each media type, and this presents a new set of insights and opportunities for podcasts.

2 Will the appeal of social media continue?

In the wake of the pandemic, social media channels became one of the primary ways of interacting and connecting with family and friends. A third of global adults reported an increase in their use of social media in the last 12 months, and a further 40% interacted with social media at the same level. This behaviour is set to continue for the next 12 months, with almost half (47%) expecting to maintain the same level of interaction with social media, and almost a quarter (24%) planning to increase their use of social media in the next 12 months, the third highest uptick in future media behaviour.

4 More reading but at a lower rate than other media types

Driven by the need to keep abreast with news updates, at the start of the pandemic, 21% of global consumers claimed to have increased their readership levels of newspapers/ magazines either online, or offline, in the last 12 months (likely driven by digital properties). However, 18% registered a decrease in their consumption in the last year (likely driven by print properties), and this is the second highest proportion of global consumers (behind radio) claiming to have consumed less in the last 12 months compared to other media.

Future reading behaviour is aligned with the past, with the almost the same proportions either planning to consume more, or less in the next 12 months as they had stated in the past. However, whilst online or offline newspapers or magazines are not experiencing the uplifts in media consumption compared to some of their digital media counterparts, an increasing proportion of global adults plan to retain the same reading behaviour in the next 12 months, suggesting some stability in global consumption for online or offline newspapers or magazines in the coming 12 months.

Under our Watch, Listen, Read and Social sections we will explore all these media behaviours in more detail, revealing the key demographic groups driving these trends and how consumption differs by country.

Media stickiness and growth drivers

When exploring the future of media consumption patterns and behaviours, marketers and advertisers are wondering which of these pandemic-driven trends will stick and which channels will show growth in 2022.

Our global data has already highlighted the media types where consumption has increased or decreased in the last 12 months, and which areas consumers might change their behaviours in the next 12 months. However, we can dig deeper by exploring the relationship between past and future behaviours across the 17 international markets surveyed.

For example, among those who maintained or increased their consumption of podcasts in the last 12 months, what proportion are likely to stick around in 2022? Likewise, among those who maintained or increased their viewing of live TV in the last 12 months, what proportion are likely to increase their consumption in the next 12 months?

YouGov has created a series of consumer metrics to help profile and quantify where growth will come from, and which media types are likely to stick in the next 12 months:

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

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.



Which media will stick in 2022?

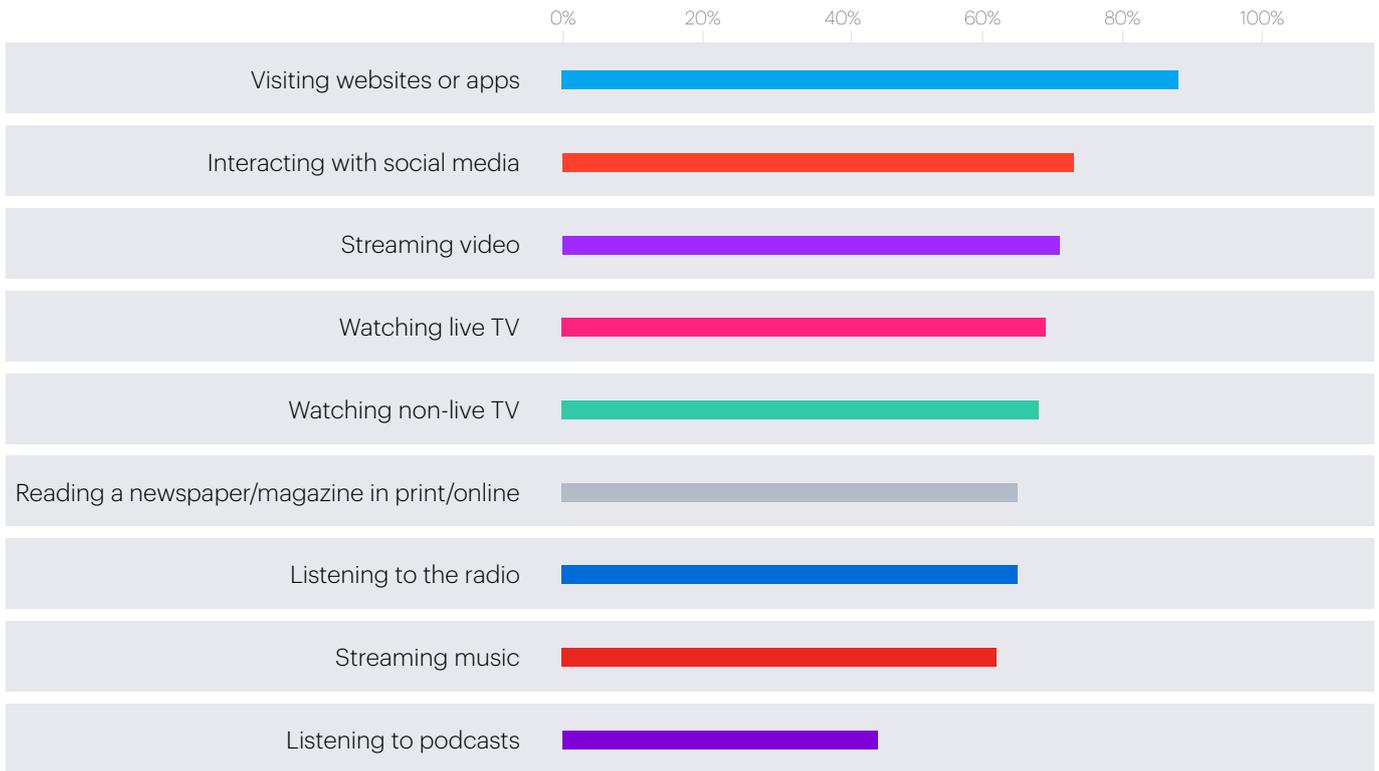
Our stickiness measure is a gauge of future intent, and whether consumers are likely to continue with their media consumption behavior of each media type. As new routines have become established amid the ongoing pandemic, our data suggests that a high proportion of global consumers are unlikely to change their media behavior dramatically in the next 12 months. Across the 17 countries surveyed, more than eight in ten adults globally registered a strong stickiness score with each media type they had previously consumed in the last 12 months. Visiting websites or apps registered the highest score, with 92% of global consumers say they will continue this behaviour over the next year.

However, as we have touched on previously, not all media are consumed in the same way. Radio is a media of habit, and listening often revolves around routines, for example,

listening to the radio in the car on the way to work. The pandemic disrupted many work and lifestyle routines in 2020, which has in turn impacted media consumption. Whilst radio registered the highest proportion of consumers globally who claimed to reduce their consumption last year, those who stuck with radio consumption appear they will remain loyal in 2022, with 91% intending to stick with radio in the next 12 months.

A large majority of global consumers who claimed to have maintained or increased their use of video streaming services (71%) or watching live TV (69%) and non-live TV (68%), show a strong propensity to stick with their level of viewing in the next 12 months (86%, 88% and 89% respectively).

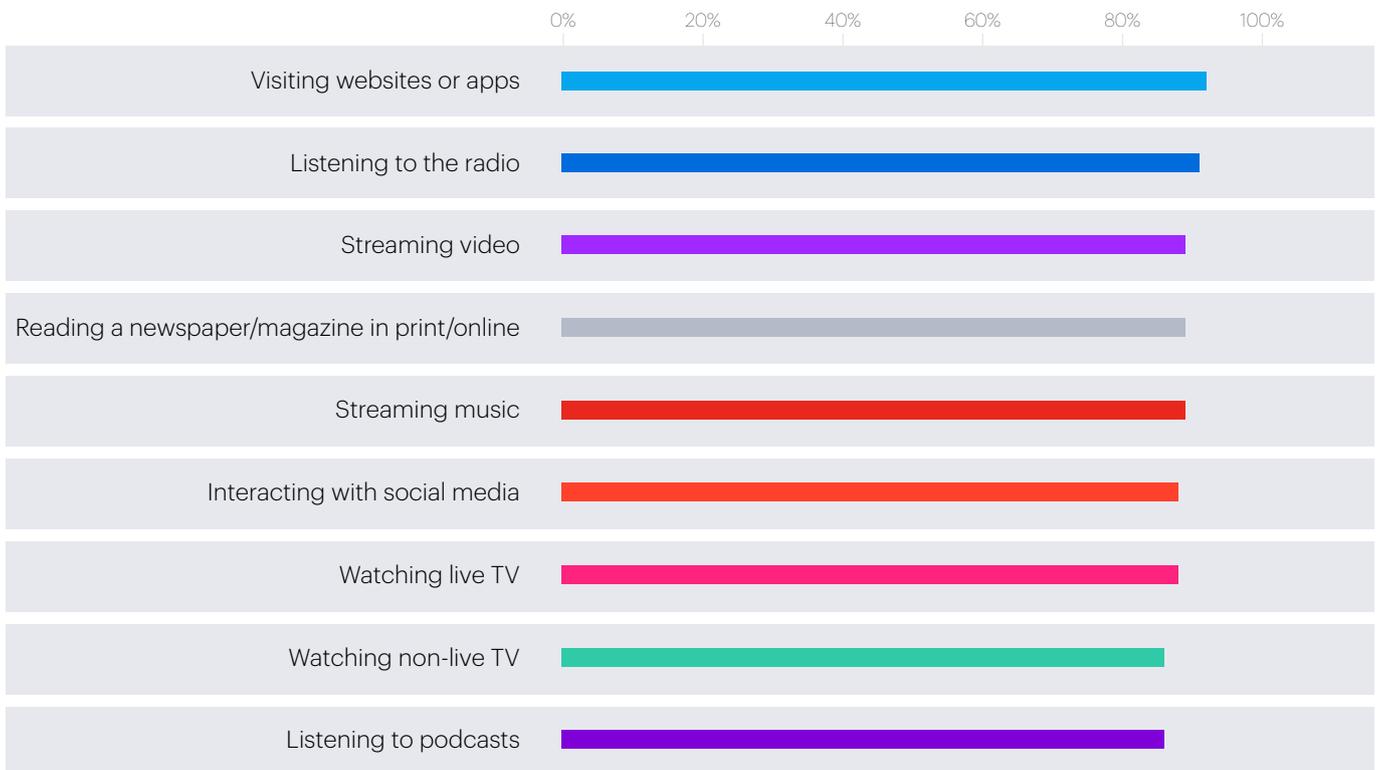
Media activity increased or maintained in last 12 months (Global)



% Plan to stick



STICKINESS - Media activity increased or maintained in last 12 months and plan to do more/same in next 12 months (Global)



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?



Growth Drivers

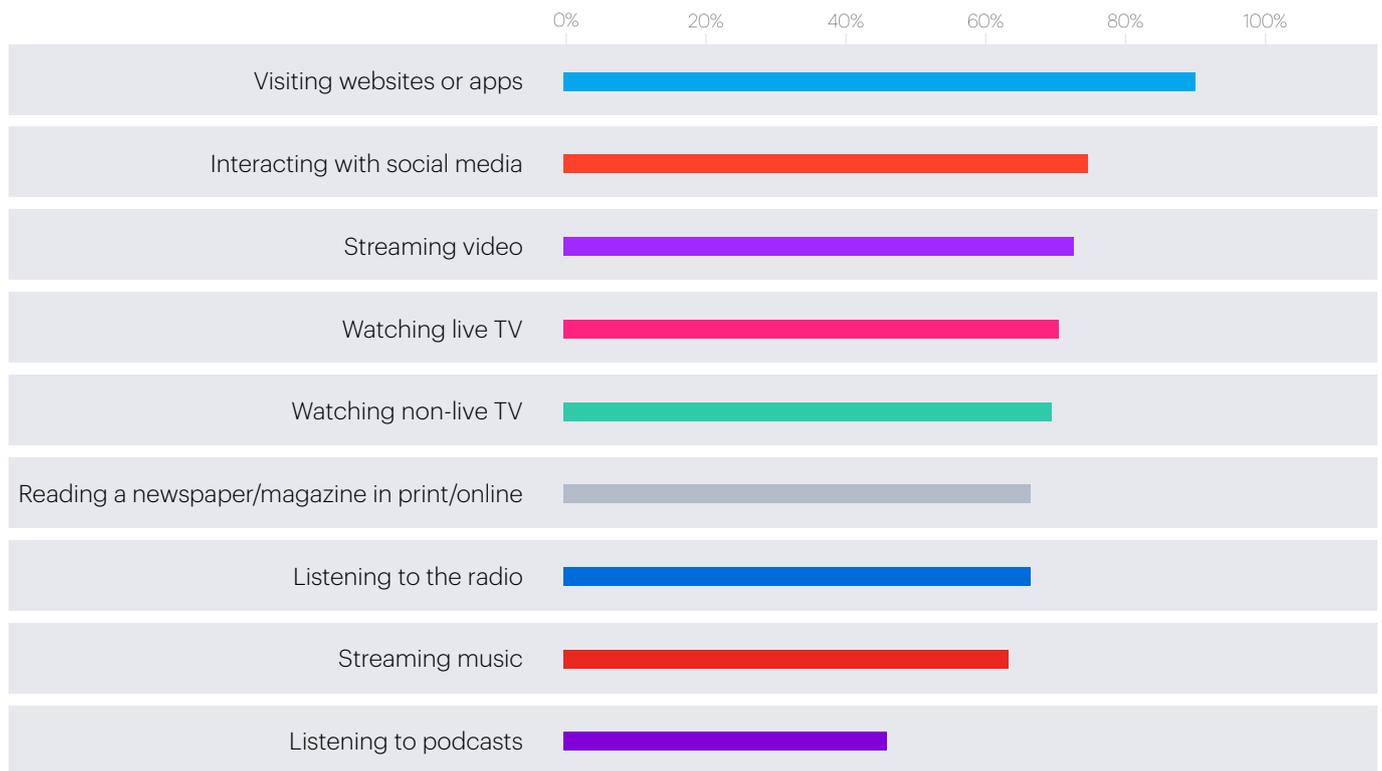
Which media activities are most likely to increase in 2022?

So, we have explored the likelihood of consumers of each media type to stick with their media choices, but what proportion are likely to increase their level of consumption?

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’, we can see that all digital media types display the largest potential growth. More than a third (36%) of those who either maintained or increased their video streaming activity in the last 12 months are likely to increase their use of video streaming services in the

next 12 months. Streaming music followed, with 32% who streamed more or the same amount of music in the last year are likely to increase their streaming activity in the next 12 months. Social media and websites/apps were in joint third position with a growth driver score of 31%. More traditional media forms (radio, newspapers or magazines and TV) are experiencing lower projected consumption growth among those who claimed to have consumed more, or the same amount of each media in the last 12 months. Interestingly, podcasts appear to be finding its niche in the media mix with a growth driver score of 30% sitting comfortably with streaming music, social media and websites or apps.

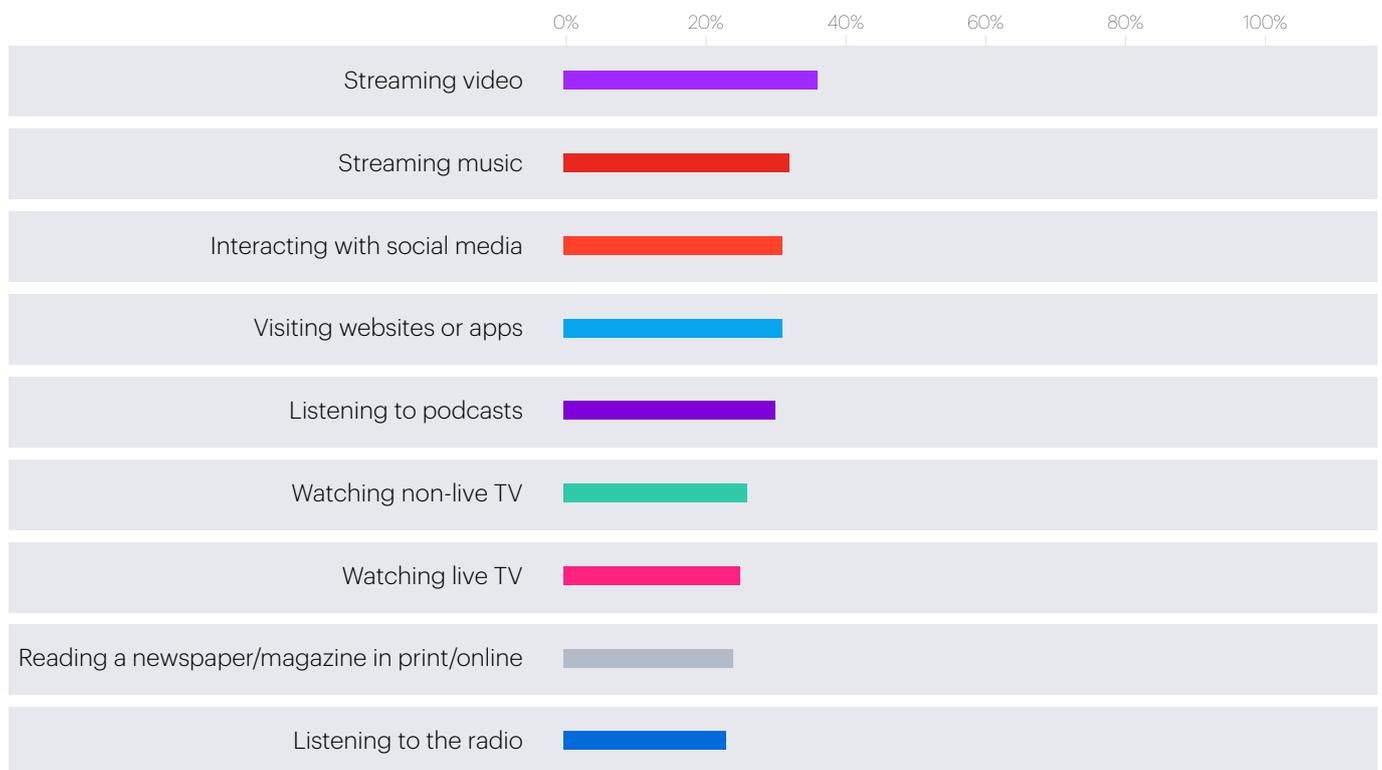
Media activity increased or maintained in last 12 months (Global)



% Plan to do more of



GROWTH DRIVERS - Media activity increased or maintained in last 12 months and plan to do MORE in next 12 months (Global)



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

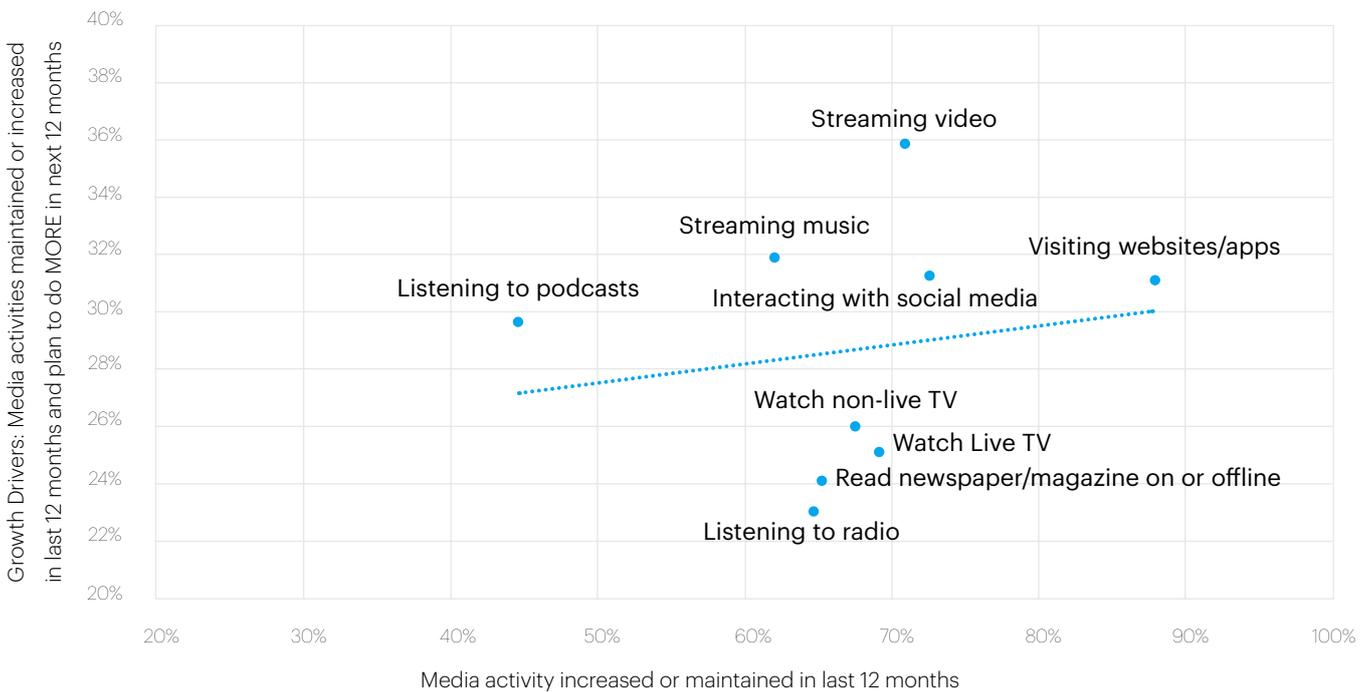
Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

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 (engaged consumers) and those who are likely to increase their consumption of each, a clear visual pattern emerges between traditional and digital media.

The scatter plot below shows 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 linear trend line represents the relationship between the two variables and presents us with three main conclusions.

The relationship between past media activity and future growth (Global)



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?

1 All media types above the trend line represent those with the greatest opportunity for growth. As it is, digital media categories such as streamed music and video, podcasts, and social media all appear above the trend line, in other words, indicating that their propensity for growth is higher than expected based on the proportion of those who have consumed each media type more, or about the same amount in the last 12 months.

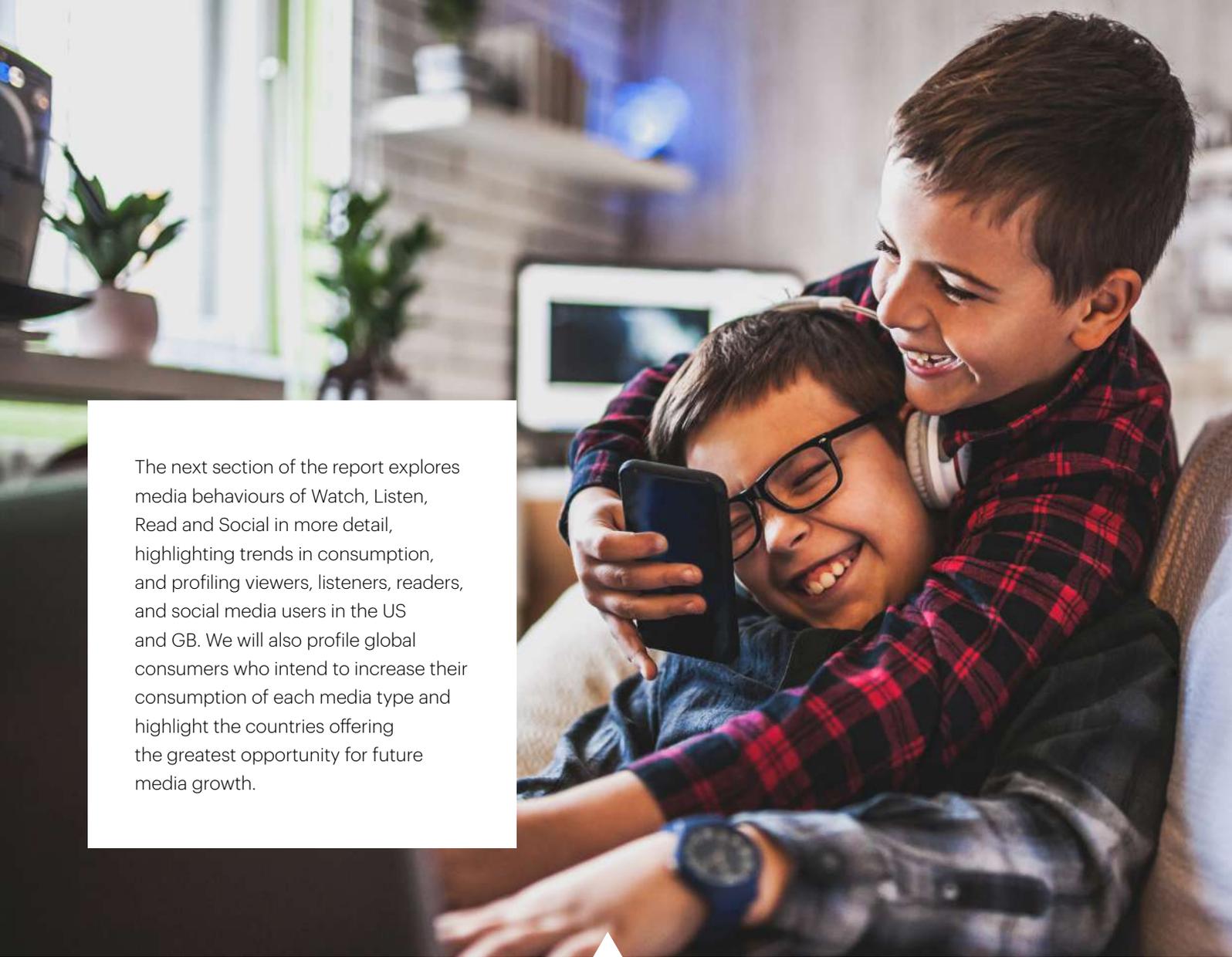
2 The media types above the trend line are well-spaced, indicating that whilst relative growth potential is high across the board, levels of those consuming more, or about the same in the last 12 months vary considerably.

3 All the traditional and more established media types are plotted below the trend line and are highly clustered. This indicates that consumption growth rates are lower than expected based on the proportion of those who claim to have consumed each media type more, or about the same in the last 12 months.

MEDIA BEHAVIOURS

Media behaviours of Watch, Listen, Read and Social

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The next section of the report explores media behaviours of Watch, Listen, Read and Social in more detail, highlighting trends in consumption, and profiling viewers, listeners, readers, and social media users in the US and GB. We will also profile global consumers who intend to increase their consumption of each media type and highlight the countries offering the greatest opportunity for future media growth.

Watch

The advent of online streaming services (online providers of content and entertainment) in the mid-2000s irrevocably changed the game for TV content. Increased time spent at home amid COVID-19 restrictions has further amplified this trend, boosting the popularity of on demand TV and streaming services such as Netflix, Disney+ and Amazon Prime. TV has moved from an era where broadcasting networks controlled what, when, and how TV content was

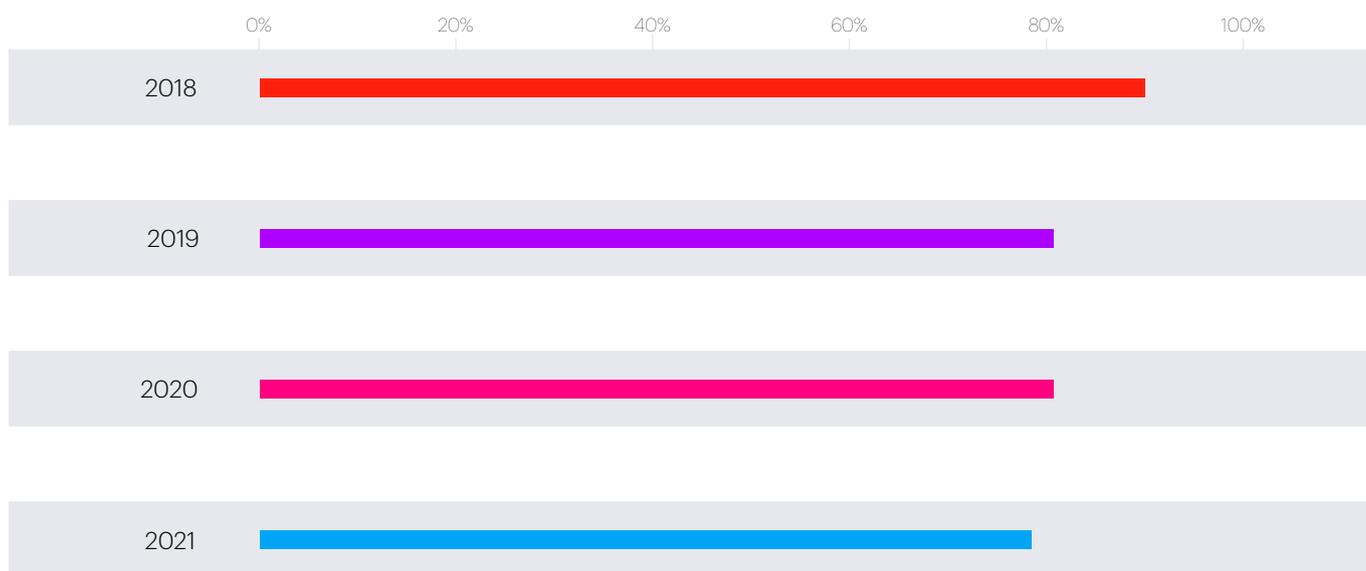
viewed, to an era where the consumer is in full control of their TV content choices. In this section, we explore live and non-live TV, and video streaming trends over the last few years with a particular focus on the US and Great Britain. We will also review which TV viewing behaviours are likely to increase globally in terms of consumption, and how these vary by age and country.

Live TV penetration remains high – particularly among the over 55s

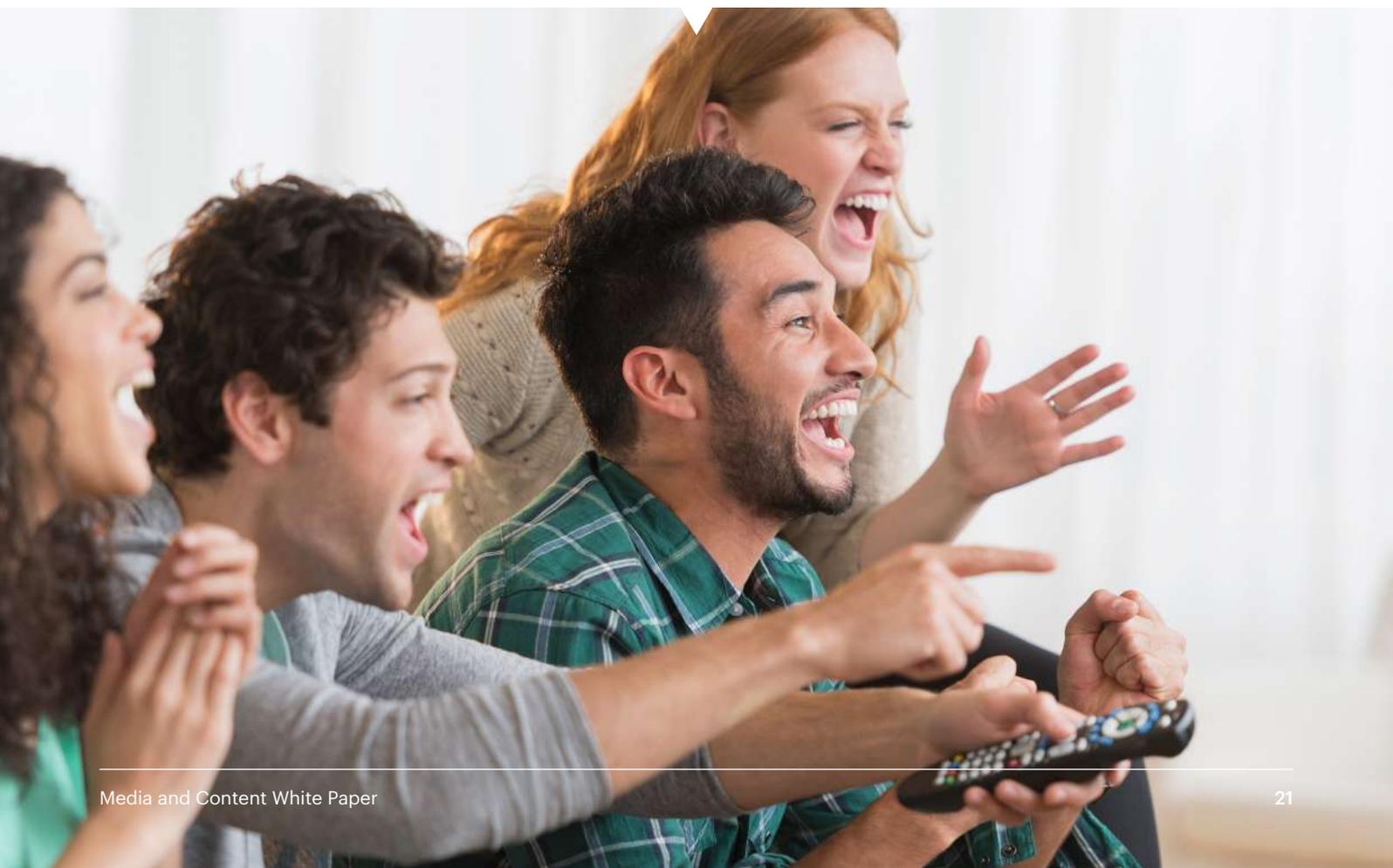
In the US, despite a drop in the weekly viewing of live TV between 2018 (90%) and 2019 (81%), consumption of live TV in the last week has remained relatively stable between 2019

and 2021. The increase in the amount of time spent at home due to the pandemic may have contributed to stabilizing this media behaviour.

Live TV viewing last week (US)



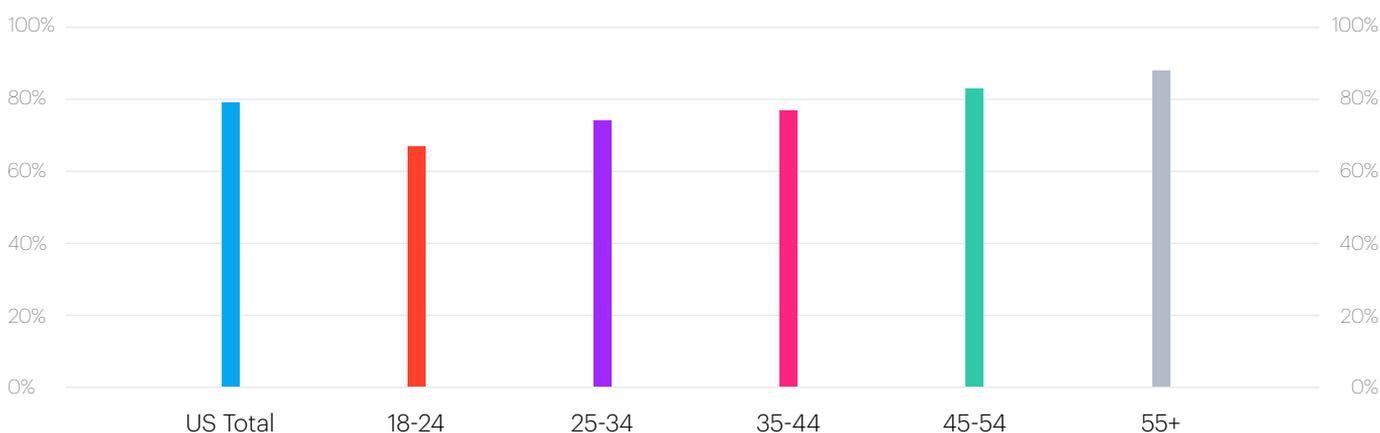
Q: In a typical week, approximately, how many hours would you spend watching live TV (on any device)? By Live TV, we mean watching programs at the time they are actually broadcast (i.e., Not on catch up or on demand) - Any weekly viewers



Over the course of 2021, data from YouGov Profiles reveals that live TV consumers tends to skew towards older generations – with 88% of US adults aged 55+ claiming to watch live TV in the previous week. On the other hand, less

than seven in ten (67%) viewers aged 18-24 reported having viewed live TV in the last week, reflecting a relatively lower, but still significant audience size.

Live TV viewing last week by age (US)



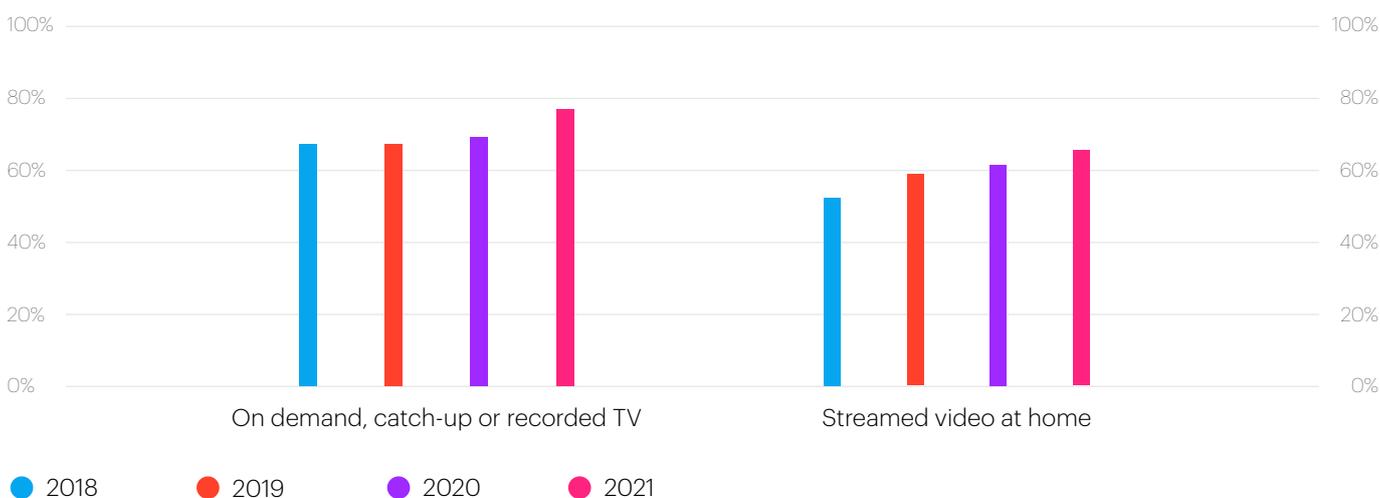
Q: In a typical week, approximately, how many hours would you spend watching live TV (on any device)? By Live TV, we mean watching programs at the time they are actually broadcast (i.e., Not on catch up or on demand) - Any weekly viewers

On demand TV viewing and video streaming continues to grow

YouGov Profiles data in the US revealed that weekly use of on demand, catch-up, or recorded TV services gathered further momentum in 2021, with weekly penetrations up

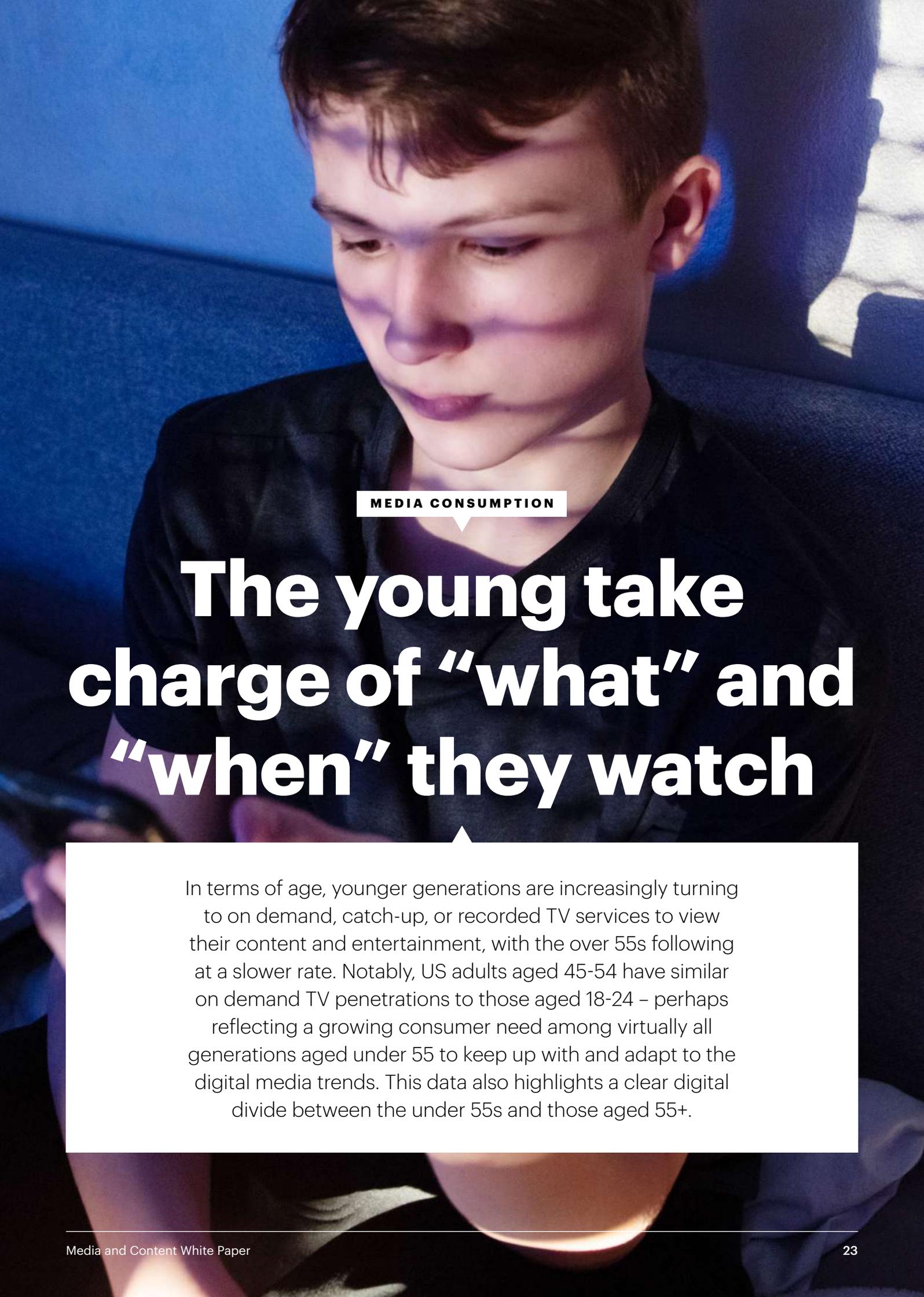
from 70% in 2020 to 78% in 2021. Similarly, weekly viewing of streamed video content also increased steadily from 63% in 2020 to 66% in 2021.

On demand TV viewing and video streaming last week (US)



Q: In a typical week, approximately, how many hours would you spend watching catch up, on demand, or recorded TV (on any device)?

Q: Approximately, how much time, did you spend watching streamed video in the last week inside your home for personal reasons? – All weekly streamed video viewers



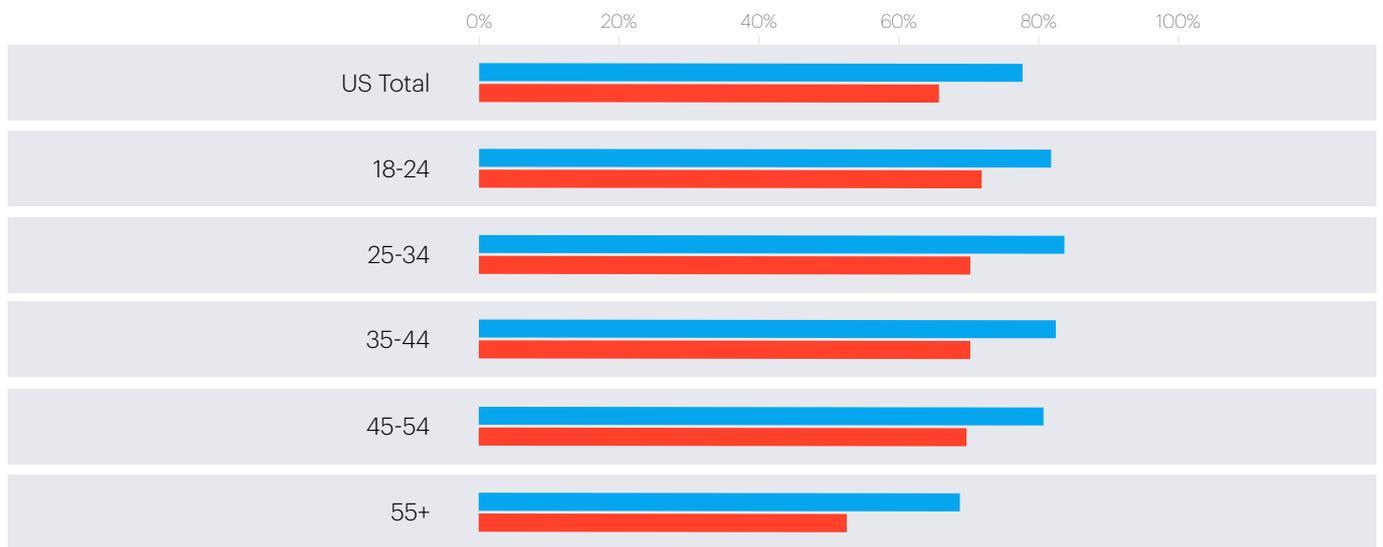
MEDIA CONSUMPTION

The young take charge of “what” and “when” they watch

In terms of age, younger generations are increasingly turning to on demand, catch-up, or recorded TV services to view their content and entertainment, with the over 55s following at a slower rate. Notably, US adults aged 45-54 have similar on demand TV penetrations to those aged 18-24 – perhaps reflecting a growing consumer need among virtually all generations aged under 55 to keep up with and adapt to the digital media trends. This data also highlights a clear digital divide between the under 55s and those aged 55+.



On demand TV viewing and video streaming last week (US)



● On demand, catch-up or recorded TV ● Streamed video at home

Q: In a typical week, approximately, how many hours would you spend watching catch up, on demand, or recorded TV (on any device)?

Q: Approximately, how much time, did you spend watching streamed video in the last week inside your home for personal reasons? – All weekly streamed video viewers

Hulu and Amazon Prime increase their audience sizes in the US

We have already seen a consistent increase in the proportion of US consumers streaming TV content between 2018 and 2021. In terms of the specific streaming players used to access streamed TV content, Roku is the primary device used

in the US in 2021 with the proportion of US adults claiming to use the service yesterday, rising from 15% in 2018 to 23% in 2021 (ahead of Amazon Fire and Apple TV).

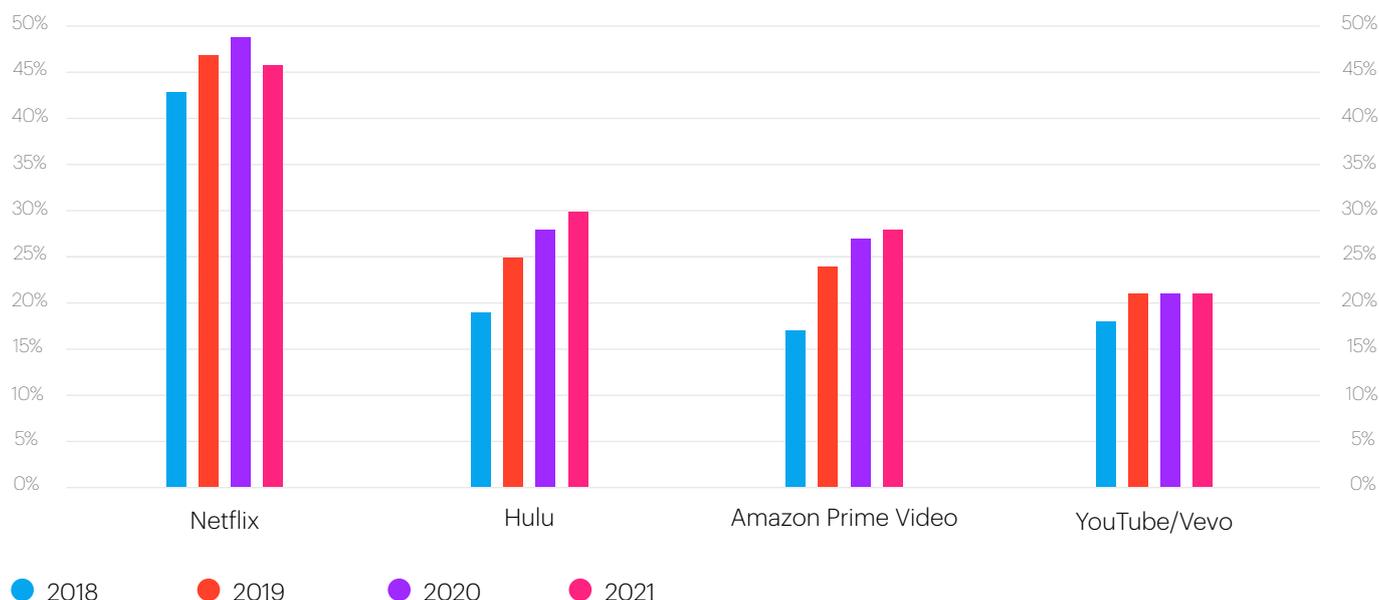
Streaming Players used to watch TV yesterday (US)				
	2018	2019	2020	2021
Roku	15%	18%	22%	23%
Amazon Fire	13%	15%	15%	16%
Apple TV	6%	8%	8%	9%
Chromecast	6%	7%	6%	7%
Sling TV	3%	4%	3%	4%

Q: Devices used to watch TV yesterday?

Turning to on demand TV services used yesterday in the US, channels such as Netflix, Hulu, and Amazon Prime have all increased consumption since 2018. Netflix is the

clear market leader in terms of penetration, but Hulu and Amazon Prime register the greatest four-year growth.

On demand TV services used yesterday (US Top 4)



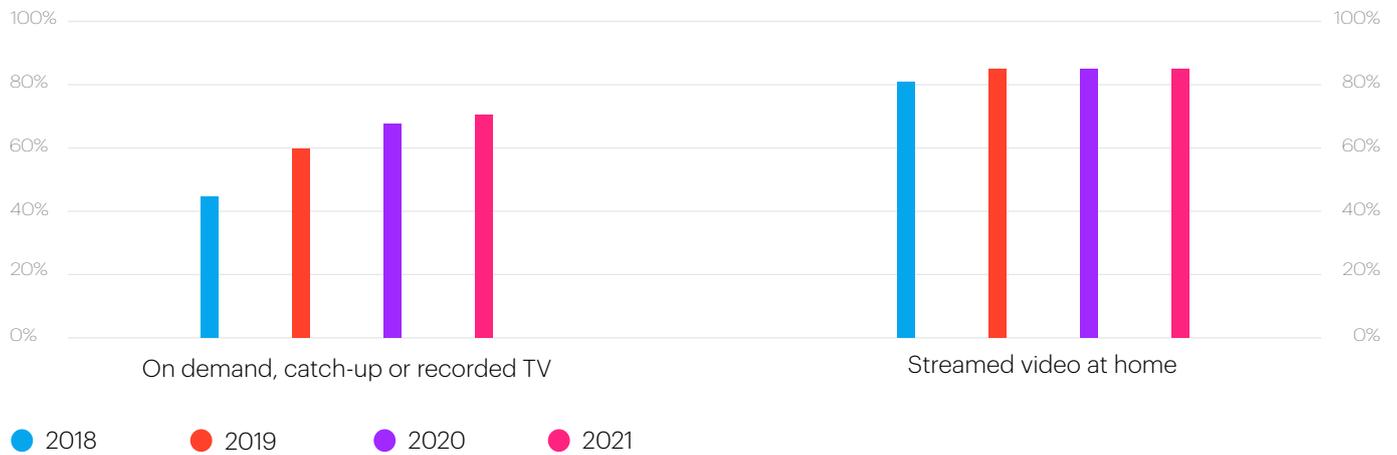
Q: Devices used to watch TV yesterday?

Strong growth for on demand TV services

Looking at Great Britain, YouGov Profiles data reveals that whilst weekly video streaming increased slightly between 2018 and 2019, penetrations have remained stable at 85% for the last three years.

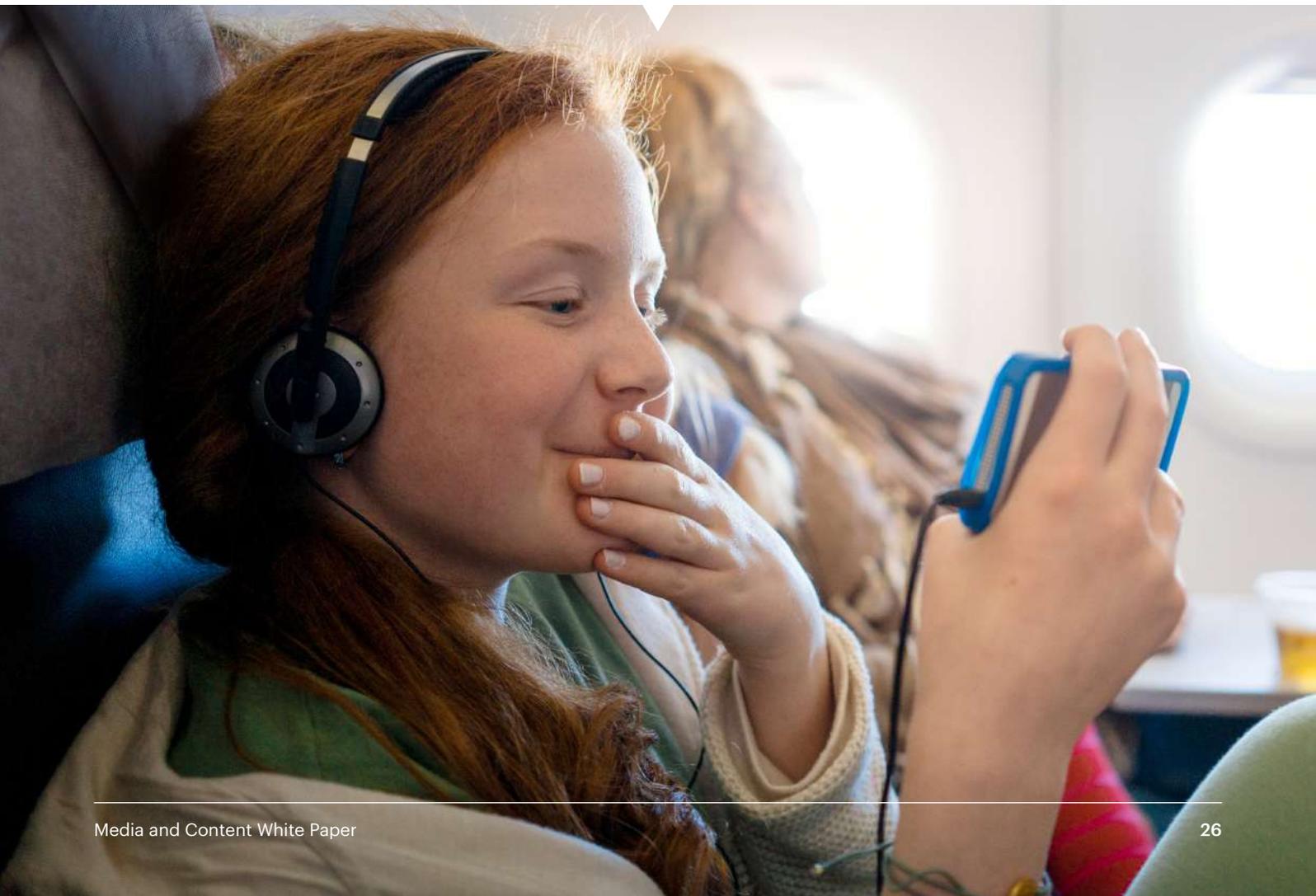
Weekly penetrations of on demand, catch-up or recorded TV services in GB have increased dramatically and consistently, from 45% in 2018, to 71% in 2021.

On-demand and catch up TV services used weekly (GB)



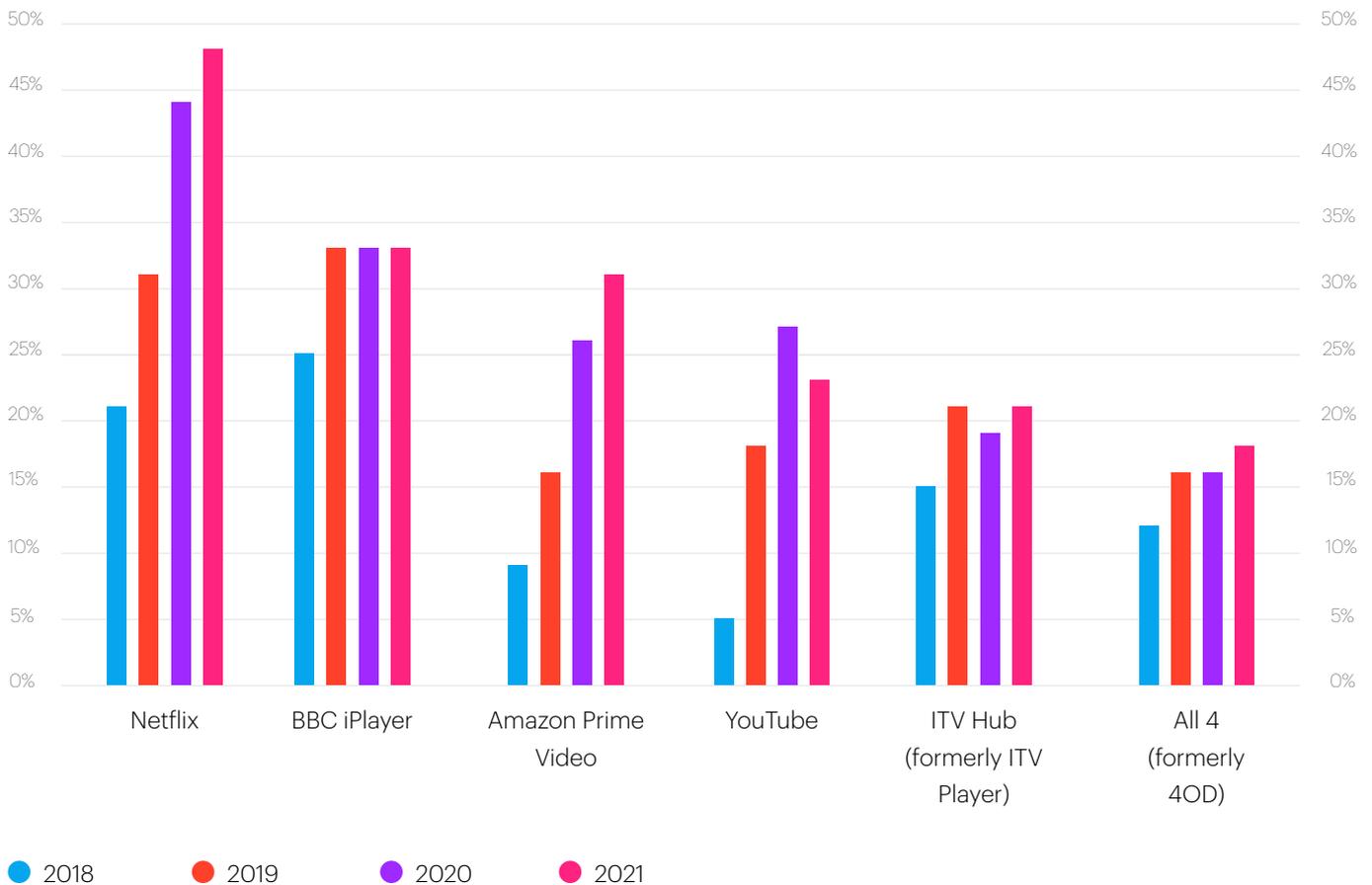
Q: Which, if any, of the following catch up or on demand services do you use on a regular basis (on any device)? By regular, we mean, at least once a week – Any weekly users

Q: Approximately, how much time, did you spend watching streamed video in the last week inside your home for personal reasons? – All weekly streamed video users



Largely driven by the pandemic and the increased amount of time spent at home, the consistent growth of on demand TV services in GB over the last four years has primarily been fuelled by Netflix, with weekly penetrations more than doubling from 21% in 2018, to 48% in 2021, and Amazon Prime increasing threefold from 9% to 31%.

On demand TV services used weekly (GB Top 6)



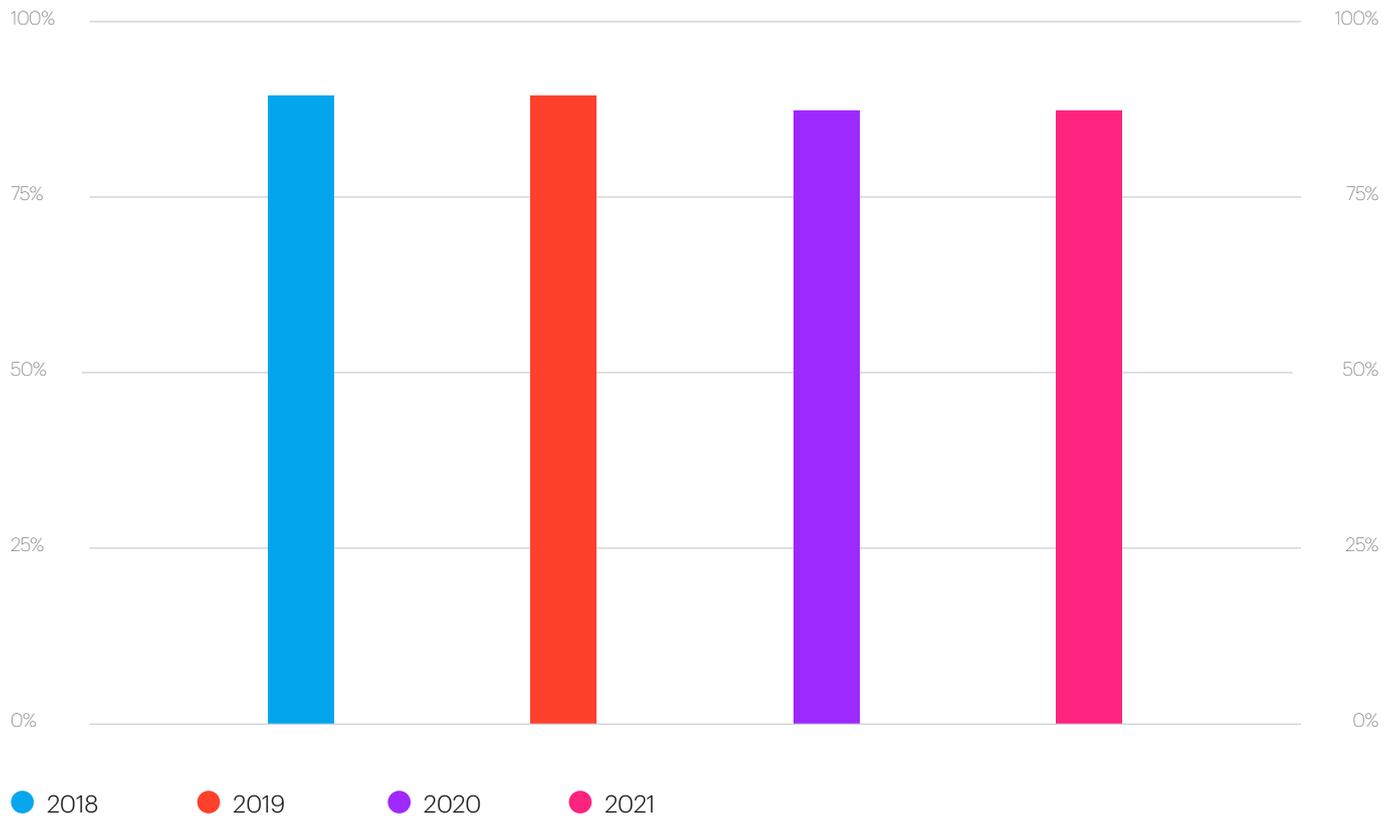
Q: Which, if any, of the following catch up or on demand services do you use on a regular basis (on any device)? By regular, we mean, at least once a week – Any weekly users

Live TV penetrations remain high and stable in GB

Despite the growing use of on demand and streaming services that enable consumers to control what, when, and how they view TV and entertainment content, live TV still maintains a high weekly penetration. As we have already seen, almost four in five consumers in the US currently watch

live TV on a weekly basis, and YouGov Profiles data presents a slightly stronger story in Great Britain, with weekly reach remaining consistently high since 2019, viewed by almost nine in ten Brits over the last four years.

Watched live TV on any device weekly (GB)



Q: In a typical week, approximately, how many hours would you spend watching Live TV on any device? (By Live TV, we mean watching programs at the same time they are actually broadcast, i.e. Not on catch up or on demand) – Any weekly viewers



TV advertising maintains its stronghold in grabbing attention

Turning our attention to advertising in GB, YouGov Profiles data reveals that whilst online advertising is most likely to grab the attention of 44% of Brits, TV adverts are in close second position with 43% penetration. However, among those aged 55+, TV is the advertising medium most likely to grab attention (50%), followed by online and printed newspapers (both 31%), reiterating the role that TV still plays in the media mix, and, particularly among older audiences.

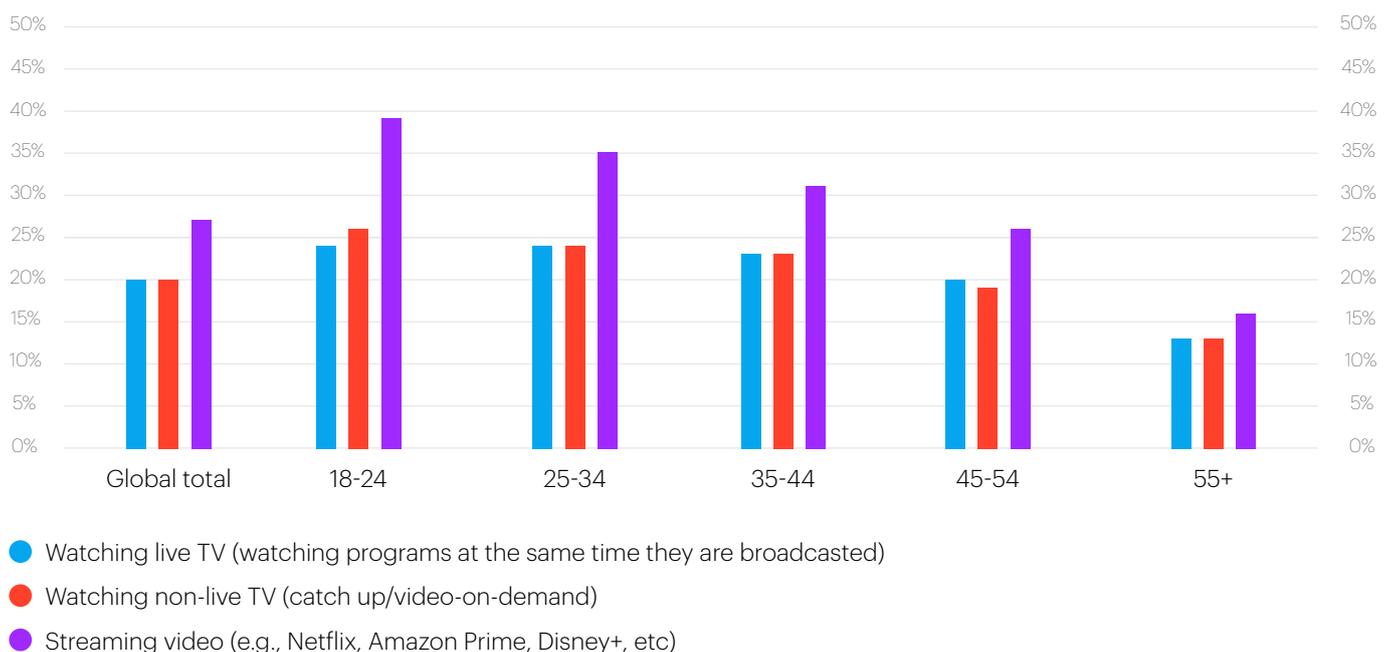


Streaming wars set to further drive consumption among young viewers

We have already looked at TV consumption trends over the last few years in the US and GB, and which TV types are likely to increase globally in terms of consumption in the next 12 months. But which age groups and countries are driving this potential global growth in TV viewing? Across the 17 international markets surveyed, YouGov data reveals that 20% of global consumers intend to increase their

consumption of both live TV, and non-live TV in the next 12 months, increasing to 24% and 26% respectively among adults aged 18-24. Those aged over 55 are least likely to increase the amount of TV they watch since their viewing behaviour is already well established compared to those in other age categories.

Intent to watch more live TV, non-live TV and streamed video in next 12 months (Global)



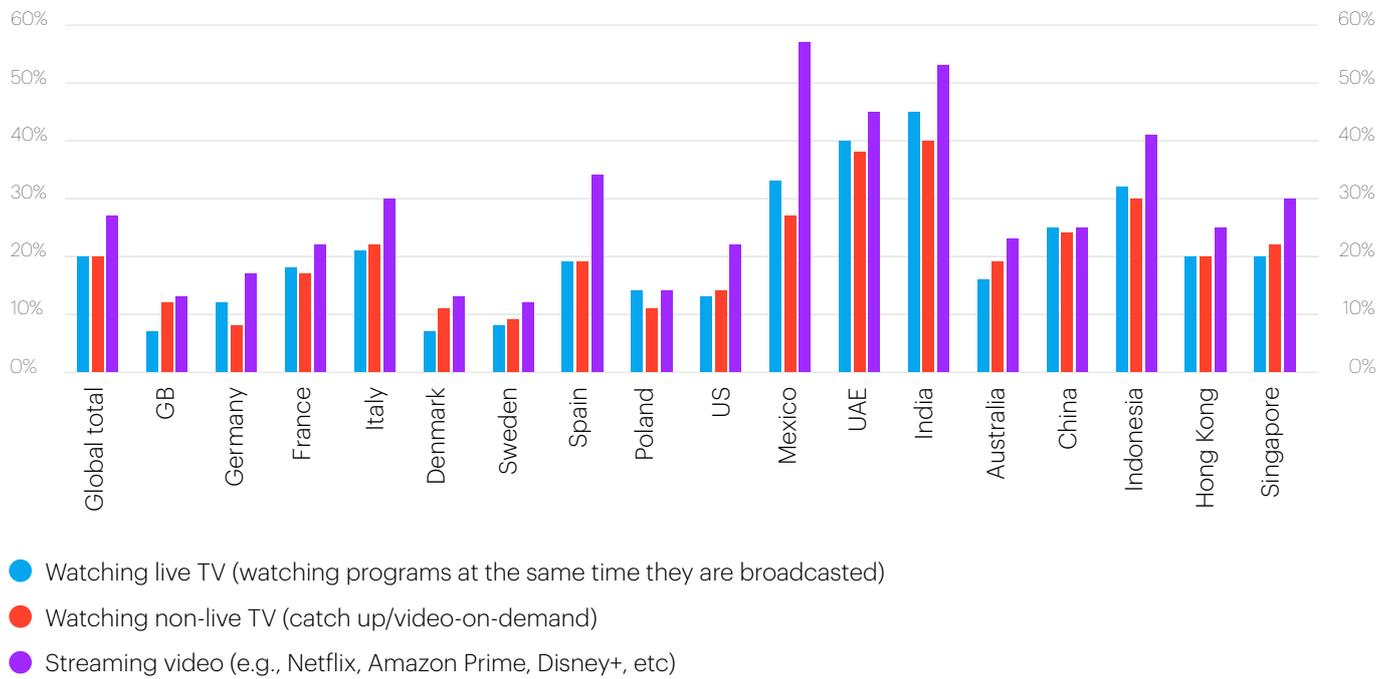
Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?



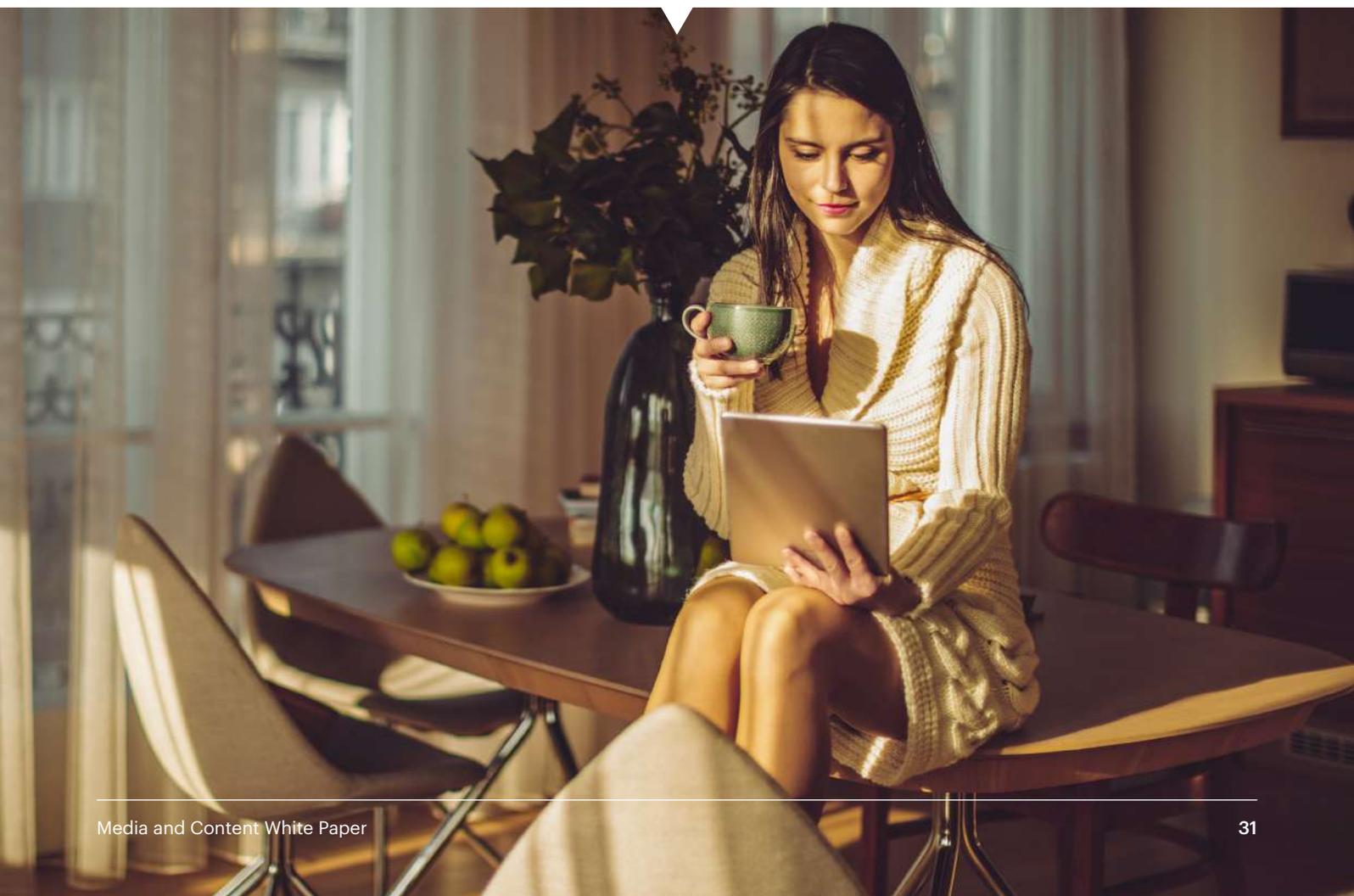
Turning to video streaming services, a higher proportion of global consumers plan to increase their consumption of streamed video next year across all age groups compared to live TV, and non-live TV. Notably, consumers aged 18-44 are twice as likely to increase their consumption of streamed video than those aged 55+. Whilst the pandemic has clearly fuelled penetrations of video streaming services such as Netflix and Disney+, all these services are continually investing in improving production quality and content libraries to enhance the viewing experience for consumers and these attributes are most likely to encourage engagement among younger media consumers. Looking

at the data by emerging markets, factors such as growing smartphone penetrations, improved internet connectivity and the entry of big players with curated content offerings, seem to be encouraging viewers to stream more video content. The countries with the highest proportion of viewers planning to increase their use of video streaming services in the next 12 months include India, UAE, Mexico, and Indonesia. In addition, live TV and on demand TV still have a strong grip on viewers in these markets – with more consumers intending to increase their consumption of all TV options in these markets.

Intend to watch more live TV, non-live TV and streamed video in next 12 months (Global)



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

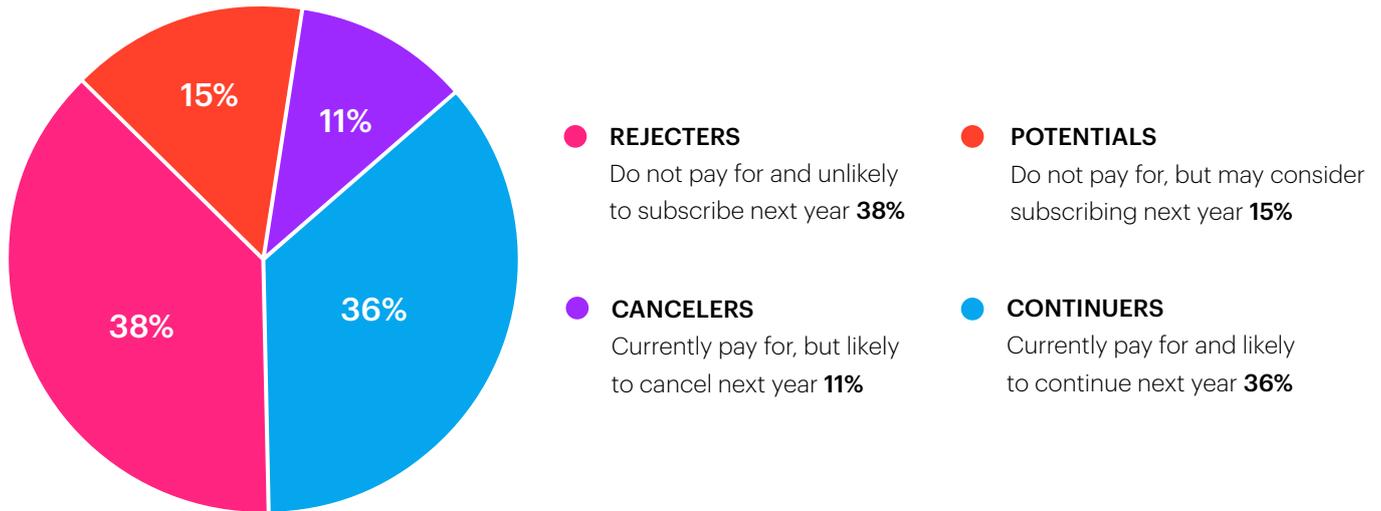


MEDIA CONSUMPTION

Will consumers continue to pay for video on demand subscriptions?

In 2020, stay-at-home restrictions provided a strong boost to video on demand (VOD) services such as Amazon Prime, Disney+ and Netflix. YouGov data shows that across the 17 international markets surveyed, consumers display relatively more stickiness to VOD than other types of paid-for content services. Over a third of all global consumers (36%) currently subscribe to and intend to stick with paying for VOD services in the coming year. Additionally, 15% do not currently pay for VOD services may consider signing up next year, representing a clear opportunity for subscription growth.

Paid for video on demand - Global

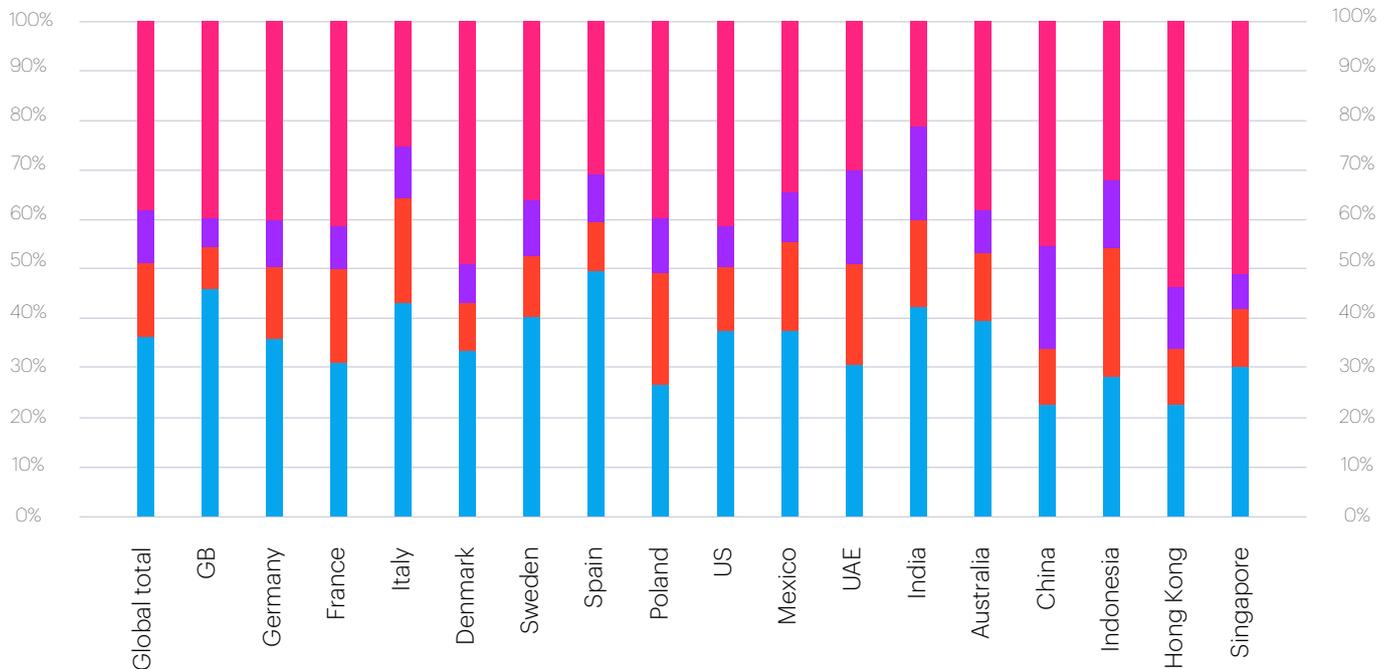


Q: Which of the following best describes your subscription(s) to following types of paid-for VOD services?

Looking at consumers of VOD subscriptions in the next 12 months by country, on balance, consumers in Western European markets are more likely to pay compared to those in Asian markets. Among the 17 markets surveyed, Spain and Great Britain have the highest demand for VOD, with almost

half (49%) of Spaniards, and 46% of Brits currently paying for, and likely to continue subscriptions next year. Other markets where consumers are more likely to stick with their VOD subscriptions include Italy (43%), India (42%), and Sweden (40%).

Relationship with VOD by country



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



Social

Social media platforms have transformed marketing and advertising across the globe and are continuing to grow and evolve. Across the 17 international markets surveyed, 87% claimed to have interacted with social media in the last 12 months. Throughout the pandemic, the importance of social media increased and not only became an essential communications platform to help consumers to stay in

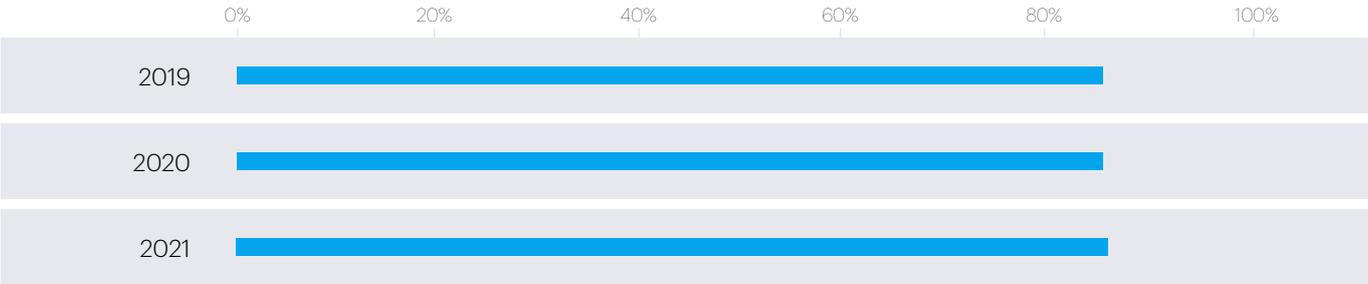
touch with friends and family, but it also enabled consumers to access and share important health updates regarding COVID-19. This section highlights social media trends within the US and Great Britain and identifies which age groups and markets register the greatest potential growth for social media.

Social media is going from strength to strength

YouGov US Profiles data reveals that monthly penetration of social media has remained stable in the last three years, with

85% of US adults accessing a social network via any platform at least once in the last month in 2021.

Use of social media networks last month (US)



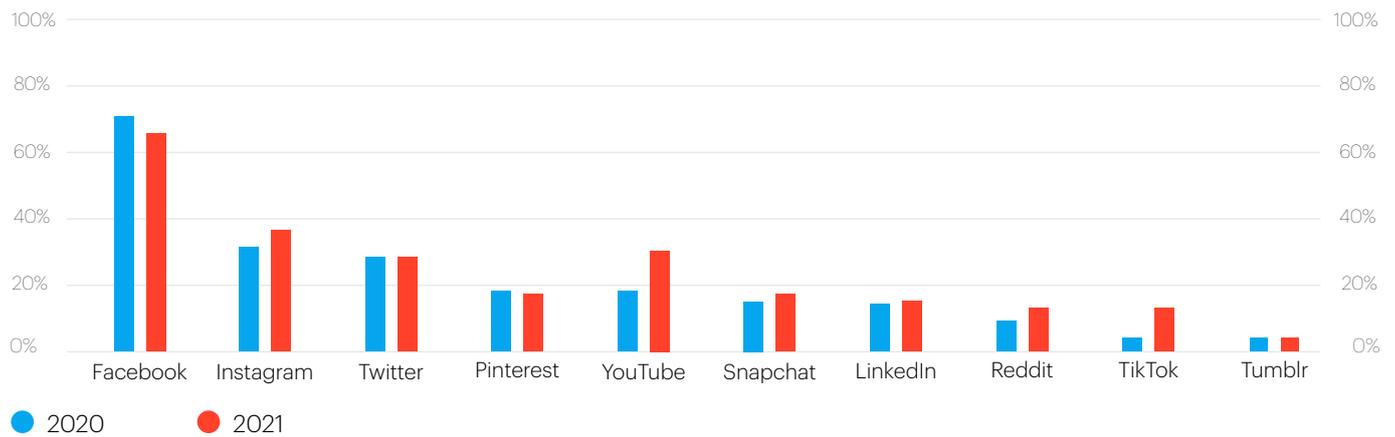
Q: Which, if any, of the following social networks have you used in the last month? Please think about any occasion that you either have visited the website directly, used a mobile application, or shared something through the network via another device – Any social media monthly users

Social media engagement in the US and Great Britain

Whilst overall penetration of social media has remained steady in the US, there has been some movement in terms of which specific social networks people tend to use. In the last two years Facebook monthly penetration in the US fell from

70% in 2020 to 65% in 2021. On the other hand, YouTube increased monthly reach from 18% to 30% year-on-year, and TikTok penetration grew three-fold from 4% to 13%.

Use of social media networks last month (US)



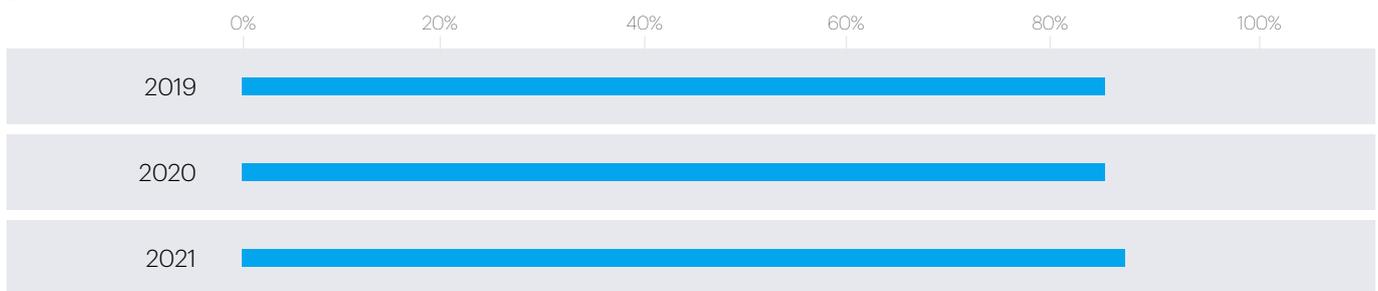
Q: Which, if any, of the following social networks have you used in the last month? Please think about any occasion that you either have visited the website directly, used a mobile application, or shared something through the network via another device – Any social media monthly users





Use of social media networks last month (GB)

YouGov GB Profiles data reveals that monthly social media penetrations over the last three years are almost identical to the US.

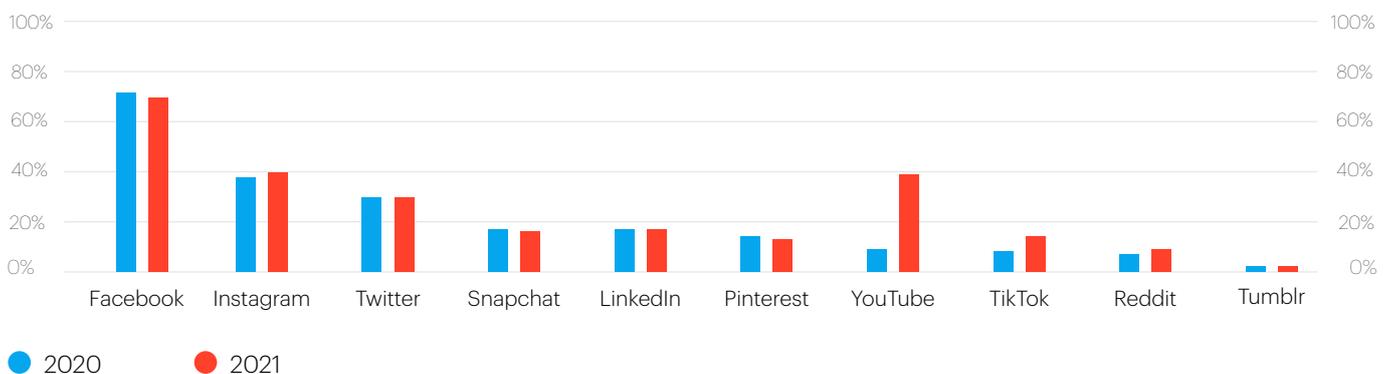


Q: Which, if any, of the following social networks have you used in the last month? Please think about any occasion that you either have visited the website directly, used a mobile application, or shared something through the network via another device – Any social media monthly users

Similar to the US, Facebook registered a year-on-year decline in GB, with monthly penetration falling from 72% in 2020 to 70% in 2021. As consumers have been confined to their homes during the pandemic, YouTube registered the most

significant gain, with monthly penetration increasing three-fold, from 9% in 2020, to 39% in 2021. Notably, TikTok also increased monthly reach from 4% to 13% year-on-year.

Use of social media networks last month (GB)



Q: Which, if any, of the following social networks have you used in the last month? Please think about any occasion that you either have visited the website directly, used a mobile application, or shared something through the network via another device – Any social media monthly users

YouTube's social media penetration fuelled by Gen Z

Looking at monthly consumption of social media networks in 2021 by age, the Gen Z cohort is driving growth for video-content platforms YouTube and TikTok in GB. In fact, among the Gen Z cohort, YouTube monthly reach exploded from 12% in 2020, to 65% in 2021, closing the gap significantly

on Instagram that dropped marginally from 74% in 2020, to 72% in 2021 among 18–24-year-olds. TikTok year-on-year monthly penetration also grew from 27% to 42% among adults aged 18-24.

USE OF SOCIAL MEDIA NETWORKS LAST MONTH BY AGE (GB)

	Total GB	18-24	25-34	35-44	45-54	55+
Any social network	86%	92%	93%	91%	88%	78%
Facebook	70%	64%	73%	74%	72%	69%
Instagram	40%	72%	63%	50%	36%	18%
YouTube	39%	65%	53%	46%	37%	25%
Twitter	30%	49%	37%	35%	34%	17%
LinkedIn	17%	20%	25%	21%	20%	10%
Snapchat	16%	61%	28%	15%	8%	2%
TikTok	14%	42%	23%	15%	10%	3%
Pinterest	13%	19%	16%	13%	13%	10%
Reddit	9%	26%	19%	9%	4%	1%
Tumblr	2%	7%	3%	1%	1%	1%

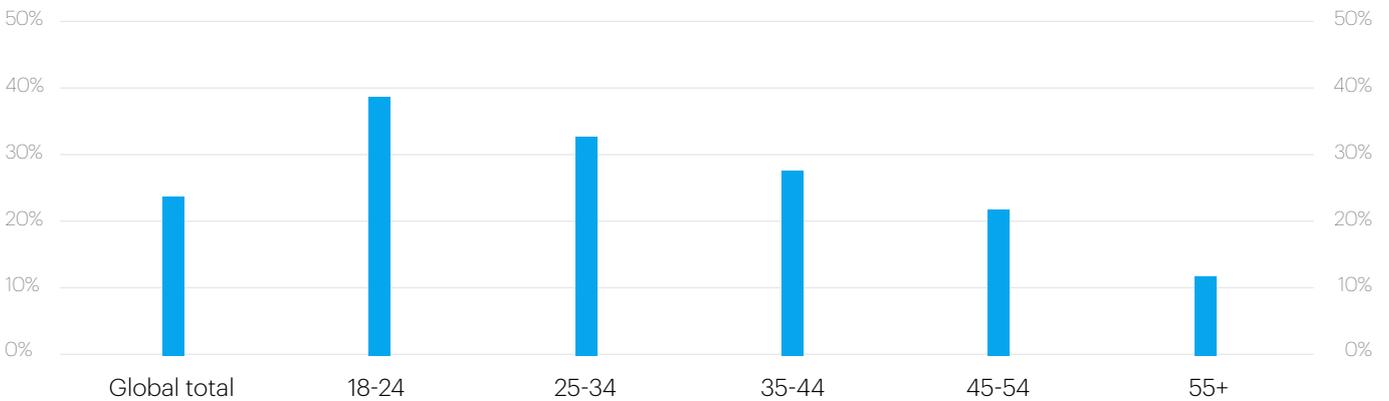
Q: Which, if any, of the following social networks have you used in the last month? Please think about any occasion that you either have visited the website directly, used a mobile application, or shared something through the network via another device – Any social media monthly users

Gen Z most likely to engage more with social media in 2022

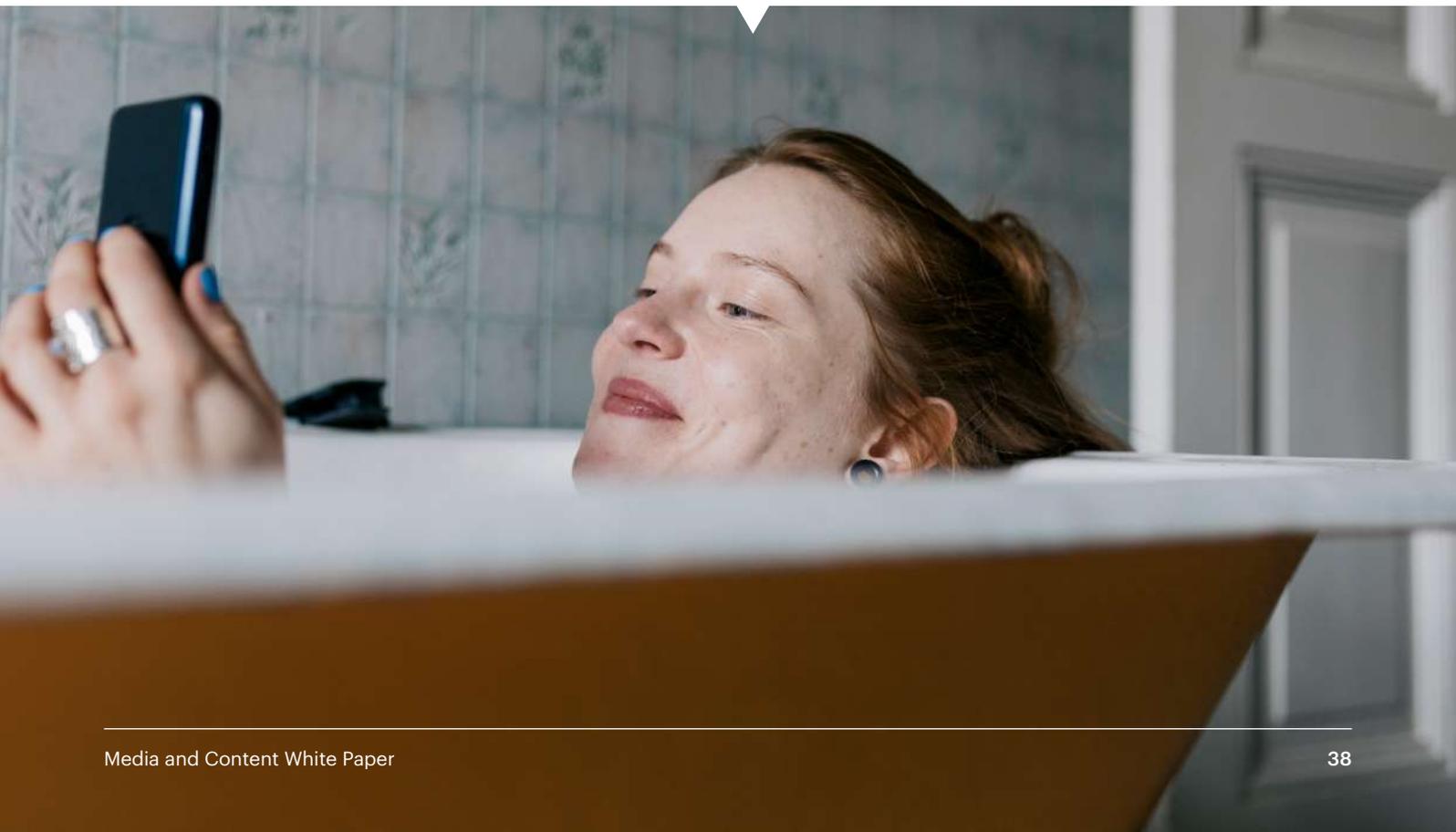
The social media landscape has evolved significantly over the past decade. The likes of Snapchat and TikTok have strongly challenged dominant industry players including Facebook, Twitter, and Instagram – ushering in unique, more entertaining and interactive ways of engaging users. Taking the old-school text and picture-sharing features to the next level, social media today is all about ‘content creation,’ opening up a myriad of marketing opportunities, such as influencer marketing. As popular platforms roll out more

engaging features – for example, Instagram launched Reels in 2020 – social media’s appeal has been growing, especially among the young. Looking at growth opportunities, YouGov data shows that globally, almost four in ten (39%) of the Gen Z cohort intend to interact more with social media in the next 12 months, with a third in the 25-34 age group registering similar intentions. Social media’s appeal is least likely to increase among those aged 55+, with only 12% reporting an intention to increase their social media consumption.

Plans to interact with social media more in next 12 months (Global)



Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following? - Any who plan to interact with social media more in the next 12 months.



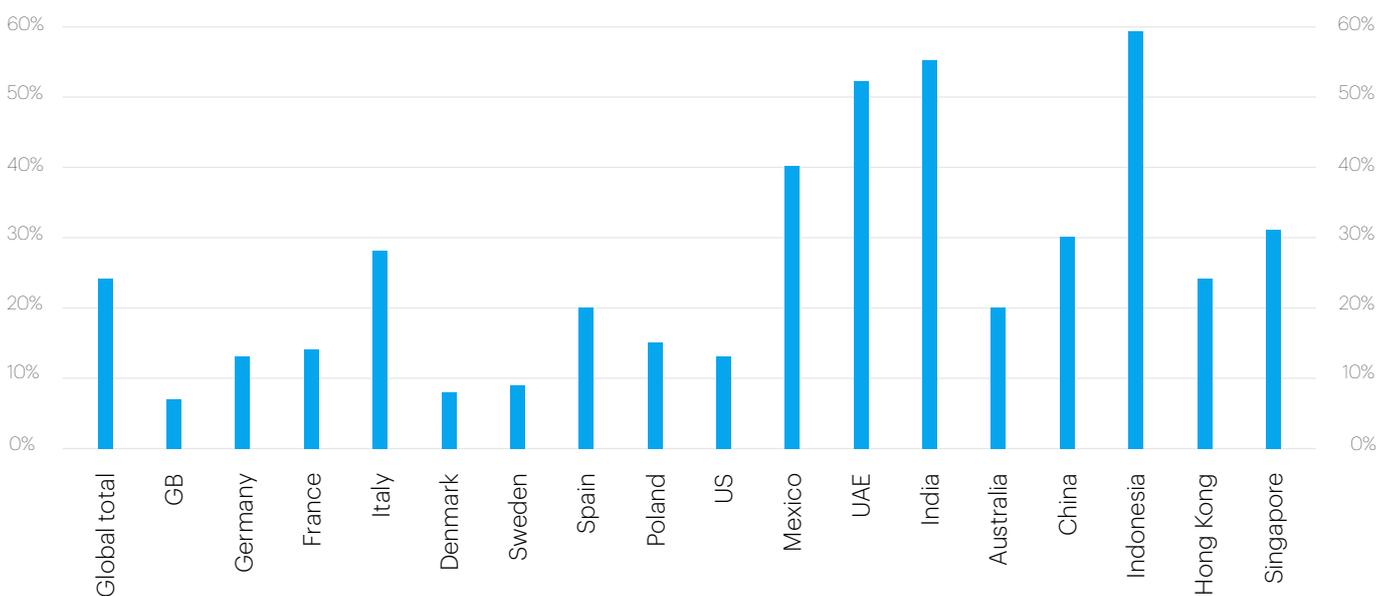


Asia drives growth in global social media consumption

YouGov data reveals that consumers in Asia are much more likely to increase their interaction with social media in the next 12 months compared to their European counterparts. Driven by young populations and large social media user

bases, Indonesia, India, and UAE register the highest proportion of consumers who intend to increase their interaction with social media in the next 12 months.

Plans to interact with social media more in next 12 months by country (Global)



Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following? - Any who plan to interact with social media more in the next 12 months.



In this audio section, we explore radio, music streaming, and podcast consumption trends over the last few years, with a particular focus on the US and Great Britain. We will also review which audio behaviours are likely to increase globally in terms of consumption, and how these vary by age and country.

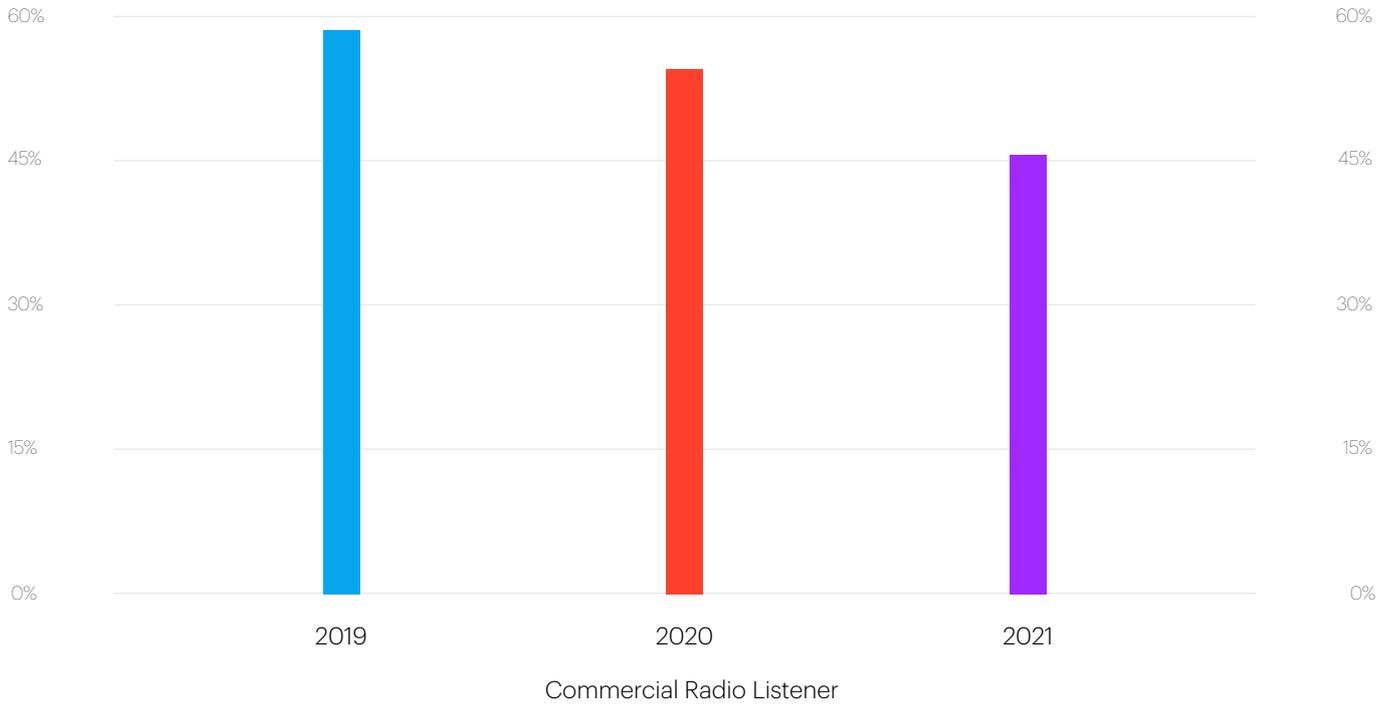
Listen

Radio listening hit hard by lockdown restrictions

Radio listening is habitual, and listening behaviour tends to follow a regular pattern. With daily routines disrupted over the last few years, and movement restricted due to lockdowns, a high proportion of radio listening which is traditionally out of home (e.g., in the car, at work, or when travelling) has declined. Looking at radio listening data in

Great Britain and the US, YouGov Profiles shows a downward trend for radio in both markets, with weekly listeners of commercial radio falling from 59% of the GB adult population in 2019 to 46% in 2021 and more regular daily listeners of AM or FM radio in the US dropping from 72% in 2019 to 62% in 2021.

Weekly commercial radio listening (GB)



Q: In a typical week, approximately, how many hours do you spend listening to commercial radio? Please include times when you are listening to the radio while also doing other things - Any weekly listeners.

In addition to the pandemic-induced reduction in travelling and commuting, changes to work routines and the emergence of new hybrid working models could alter radio consumption routines for the long

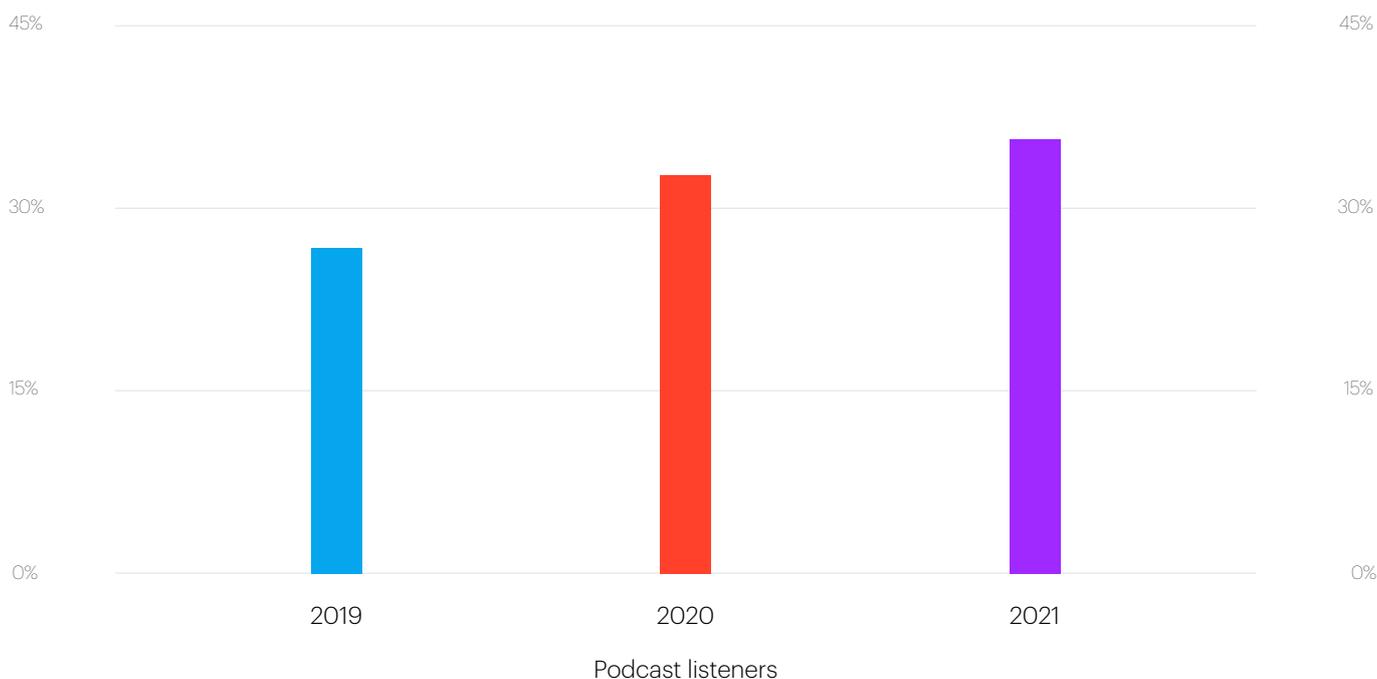
term - we have already seen that radio registered the highest proportion of global consumers claiming to have reduced their radio listening in the last 12 months, and likely to listen less in the next 12 months.

Are podcasts attracting more listeners?

Whilst radio listening is in decline, podcasts appear to be bucking the audio trend in many markets, with the proportion of weekly podcast listeners in GB increasing

reach consistently from 27% in 2019 to 36% in 2021. Similarly, the number of US consumers who ever listen to podcasts increased from 39% in 2019 to 47% in 2021.

Weekly podcast listeners (GB)

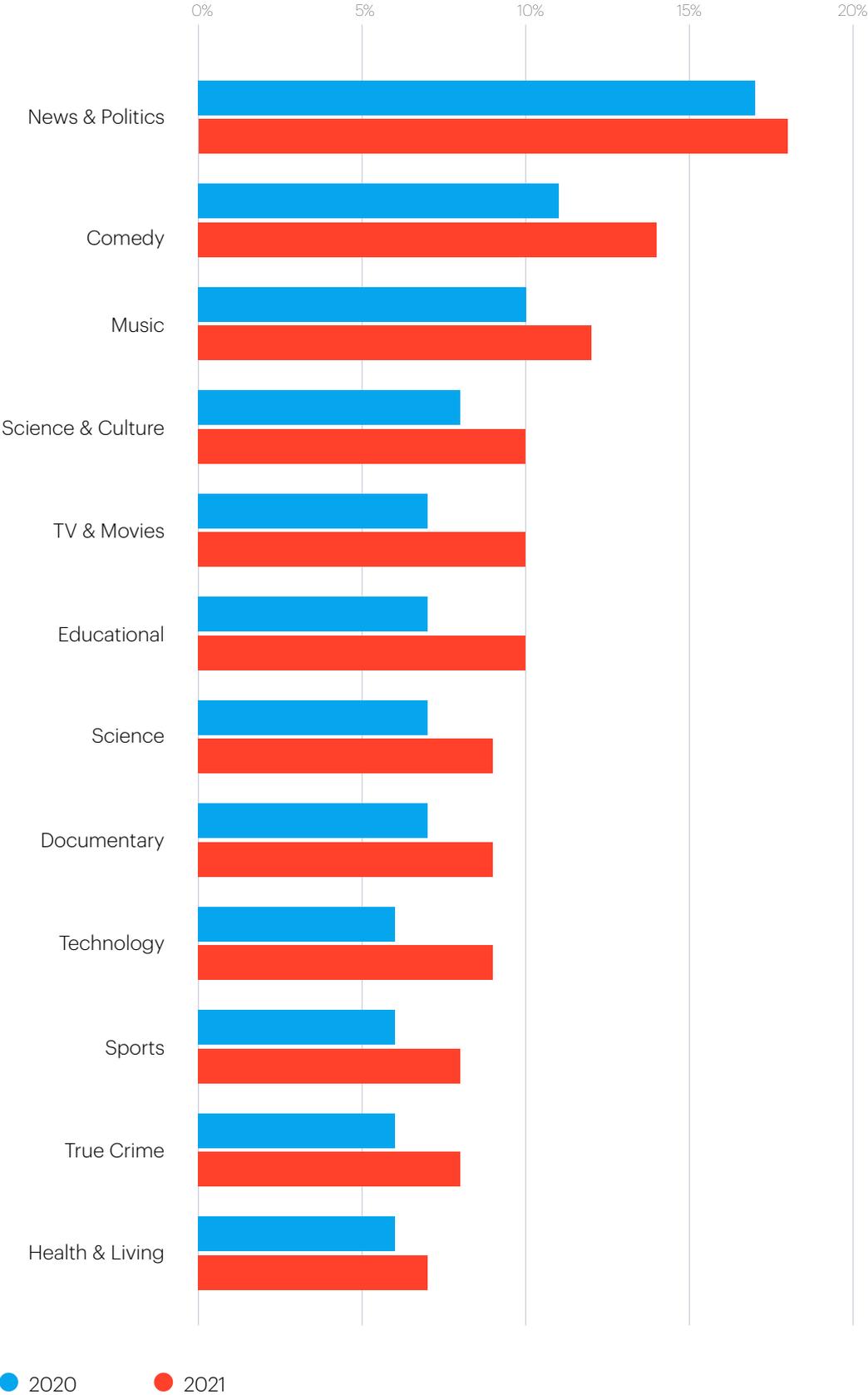


Q: Approximately, how many hours per week do you typically spend listening to podcasts? - Any weekly listeners

We have already seen that across the 17 international markets surveyed, 59% claim to have listened to podcasts in the last 12 months, with 19% of consumers claiming to have listened to them more in the last 12 months. But what type of podcasts are engaging listeners? The growing level of interest in podcasts is endorsed in the US, where every podcast topic has grown in terms of

regular listening between 2020 and 2021. Looking at individual podcast genre, news and politics is the top content type listened to regularly among US consumers in 2021, followed by comedy, and music. In GB, the podcast content preferences were slightly different, with comedy scoring highest among 15% of the GB population, followed by music (10%), and news and politics (8%).

Podcast genres regularly listened to (US)



Q: Which, if any, of the following genres of podcasts do you regularly listen to? – Any regular listeners

Mobile phones are the primary device for listening to music among those aged under 34

Whilst the pandemic has disrupted radio listening, increased time spent at home has amplified the popularity of streaming music services, with streamed music consumption increasing over the last few years, and likely to continue to grow in the coming years. Whilst streaming music is increasing in popularity, in the US, traditional radio remains the most popular platform of choice when

listening to music in 2021 (65%), followed by online radio or streaming services (54%). Among US consumers aged 18-24, online radio or streaming services is the top platform choice for music (72%) followed by mobile phone (70%) whilst older generations are more likely to favour traditional radio.

Method used to listen to music by age (US)						
	US Total	18-24	25-34	35-44	45-54	55+
Radio	65%	49%	50%	57%	65%	72%
Online radio or streaming	54%	72%	70%	66%	64%	42%
CDs	46%	20%	33%	39%	42%	54%
Mobile phone	44%	70%	63%	52%	50%	33%
Desktop/laptop	42%	49%	50%	47%	44%	37%
Music TV channels	22%	8%	23%	22%	24%	23%
Vinyl records	11%	13%	13%	9%	9%	12%
Cassette tapes	8%	7%	5%	6%	6%	10%

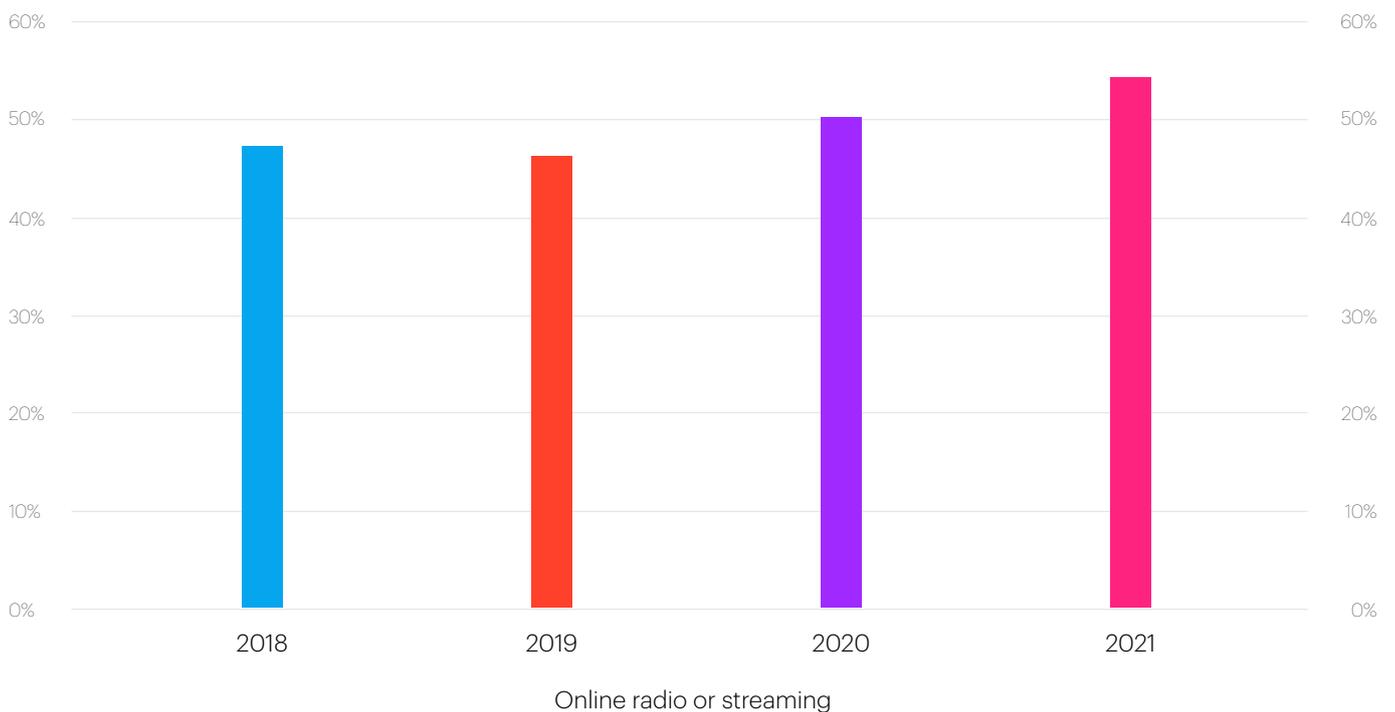
Q: Which of the following do you normally use to listen to music?

Growing trend for online music consumption

The use of online radio or streaming services to listen to music continues to grow in popularity as they provide better sound quality, music search tools and offer genre specific channels for listeners. In the US, online consumption of music has increased steadily from 47% of all US consumers in 2019

to 54% in 2021, and in terms of streaming music services, Spotify remains the most popular choice, with 18% of the US population claiming to use Spotify monthly (increasing from 15% in 2019).

Use online radio or streaming to listen to music (US)



Q: Which of the following do you normally use to listen to music?

We have already looked at audio consumption trends in the US and GB, and which audio media types are likely to increase global listening in the next 12 months, but which age groups are driving this potential global

growth in listening? This next section will also look at which countries register the highest potential growth and how these results compare by audio type.



MEDIA CONSUMPTION

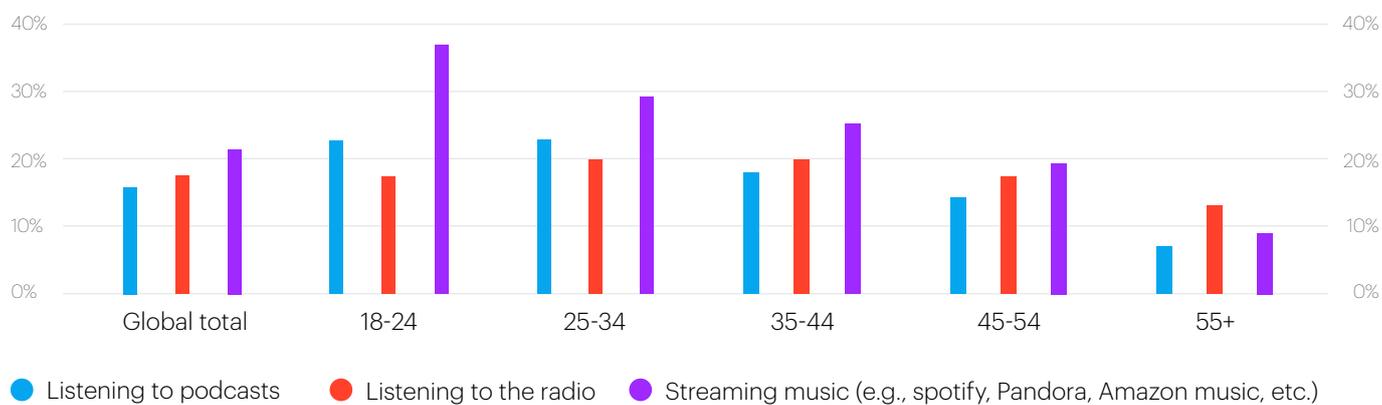
Two in five Gen Z consumers plan to stream more music in 2022

Across the 17 international markets surveyed, a higher proportion of consumers plan to stream more music in the next 12 months (22%) compared to listening to more radio (17%) and more podcasts (16%). Within the audio industry, younger generations are set to boost the popularity of streaming music as well as podcasts. About two in five (38%) Gen Z global consumers plan to stream more music in the next 12 months, followed by 30% of adults aged 24–34. The likelihood to stream more music in the coming

12 months declines gradually by age, with only 9% of global consumers aged 55+ planning to increase their music streaming activity. In terms of podcasts, about a quarter (23%) of those in each of the 18–24 and 25–34 age groups are likely to increase their consumption of podcast content in the next 12 months – a higher proportion than any other age groups. Once again, we see the lowest potential growth for all audio platforms among the over 55s.



Plan to listen to more podcasts, radio or streamed music in next 12 months by age (Global)

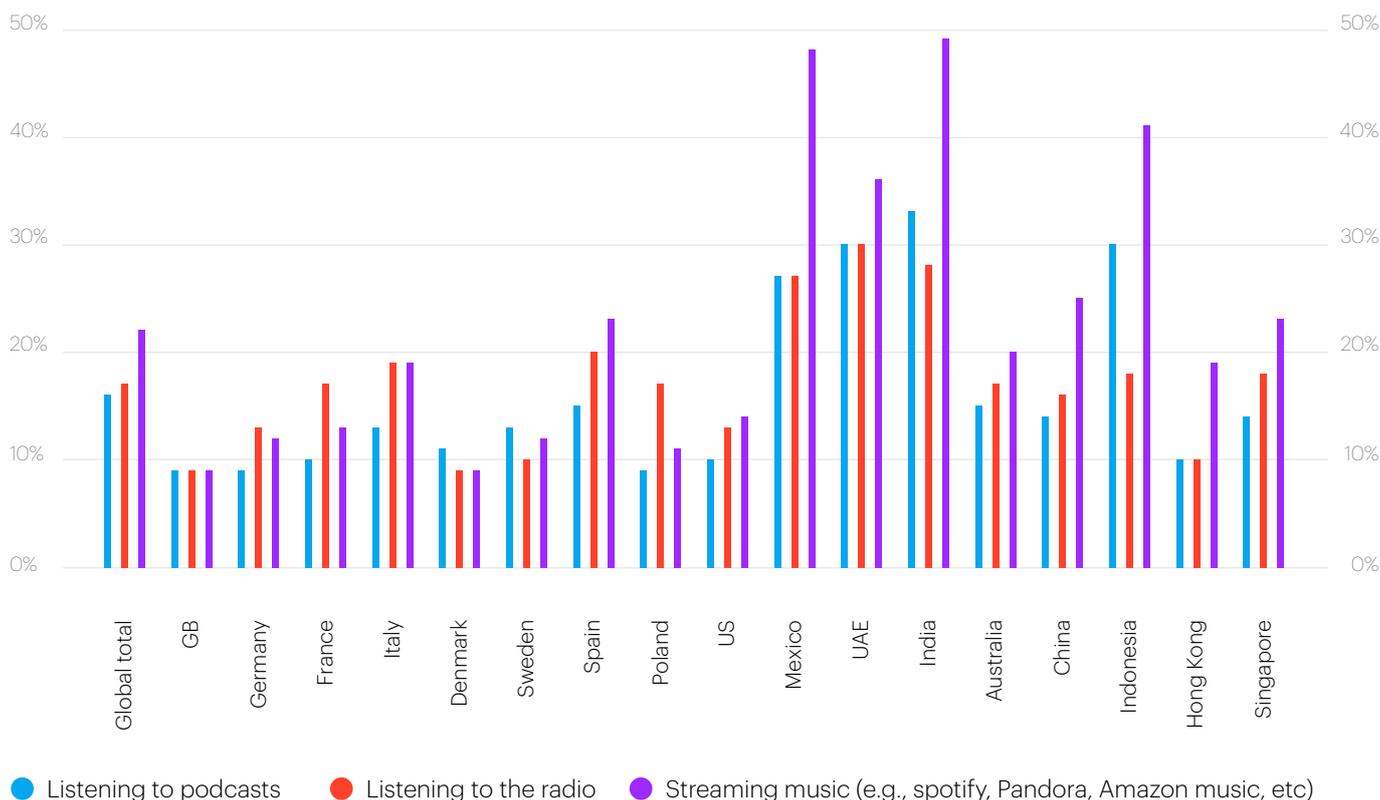


Q: In the next 12 months, do you think you are likely to do more, less, or about the same of the following?

Looking at potential increases in audio content in the next 12 months by market, countries with older populations are less likely to increase their radio, podcast, or streamed music consumption. For example, less than 15% of consumers

in GB, Germany and France intend to increase their music streaming in the next 12 months. The proportion of consumers likely to increase their use of podcasts is even lower in GB (9%), Germany (9%), and France (10%).

Plan to listen to more podcasts, radio or streamed music in the next 12 months by country (Global)



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, when we look at emerging markets with younger populations, always-on listeners powered by improving internet connectivity and high smartphone penetrations are driving the demand for all audio platforms. For example, almost half of all consumers in India (49%) and Mexico (48%), and over two in five (41%) in Indonesia, plan to stream more music in the

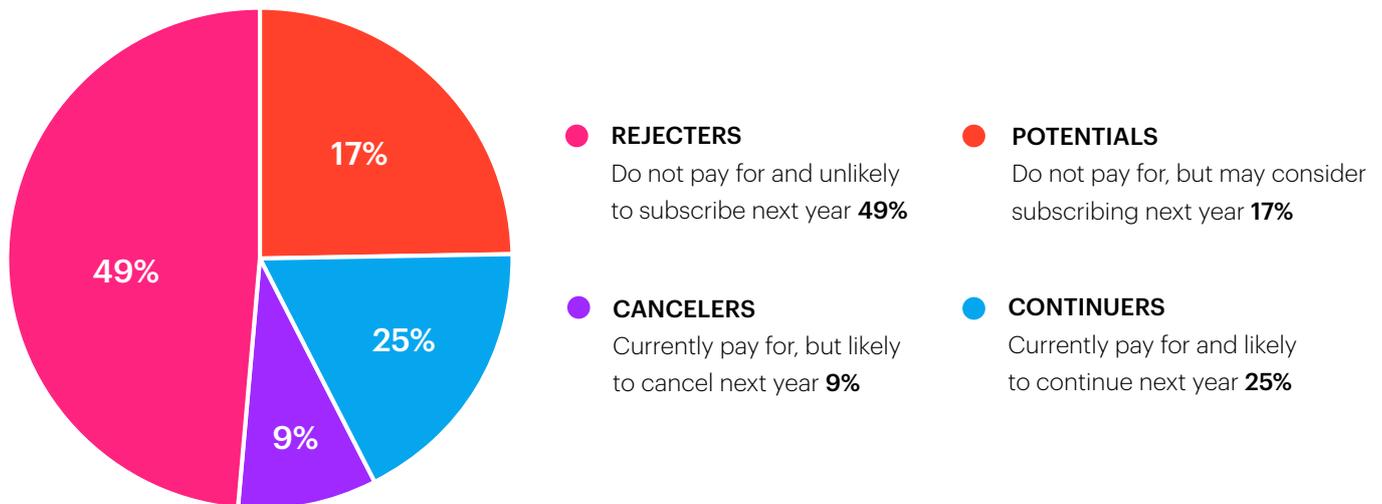
next 12 months. Free and ad-supported services and subscription promotions could also be likely pull factors for music streaming in these markets. As the popularity of podcasts skews towards the young, a third of Indians plan to increase their use of podcasts in the next 12 months, with over a quarter intending to increase their podcast consumption in Mexico, UAE, and Indonesia.

One in four global consumers plan to sticking with music streaming services

Over the last few years, leading music streaming service providers such as Spotify have continued to see growth in subscriptions. YouGov data shows that a quarter of global consumers currently pay for music subscriptions

and are likely to continue to do so in the next 12 months. However, there is room for growth, with almost a fifth of all global consumers (17%) who currently do not have a paid subscription, considering signing up next year.

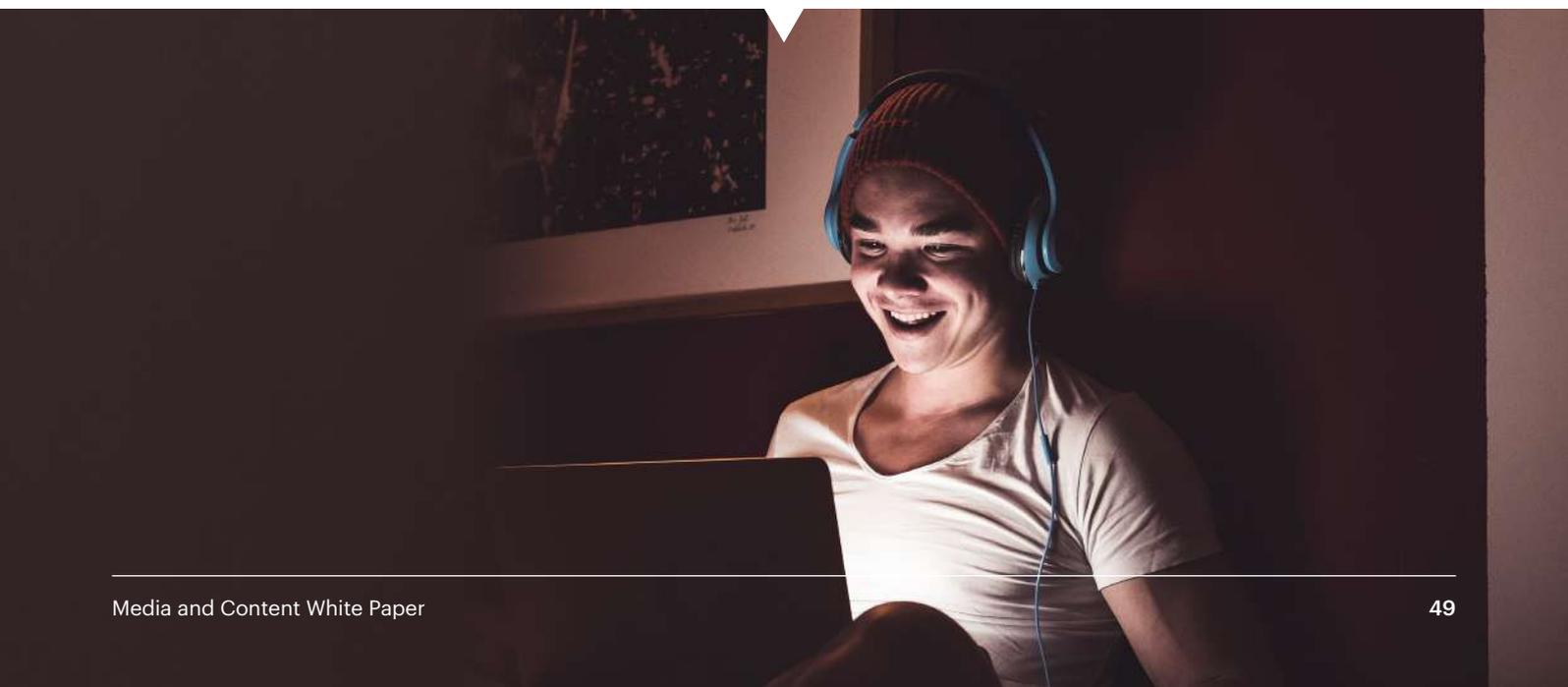
Paid-for music subscriptions (Global)



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

On the other hand, almost half (49%) globally do not currently pay for music subscriptions and are unlikely to convert in the next 12 months. Less than one in ten (9%)

globally are 'Cancelers' who currently pay for but are likely to cancel music subscription services next year.

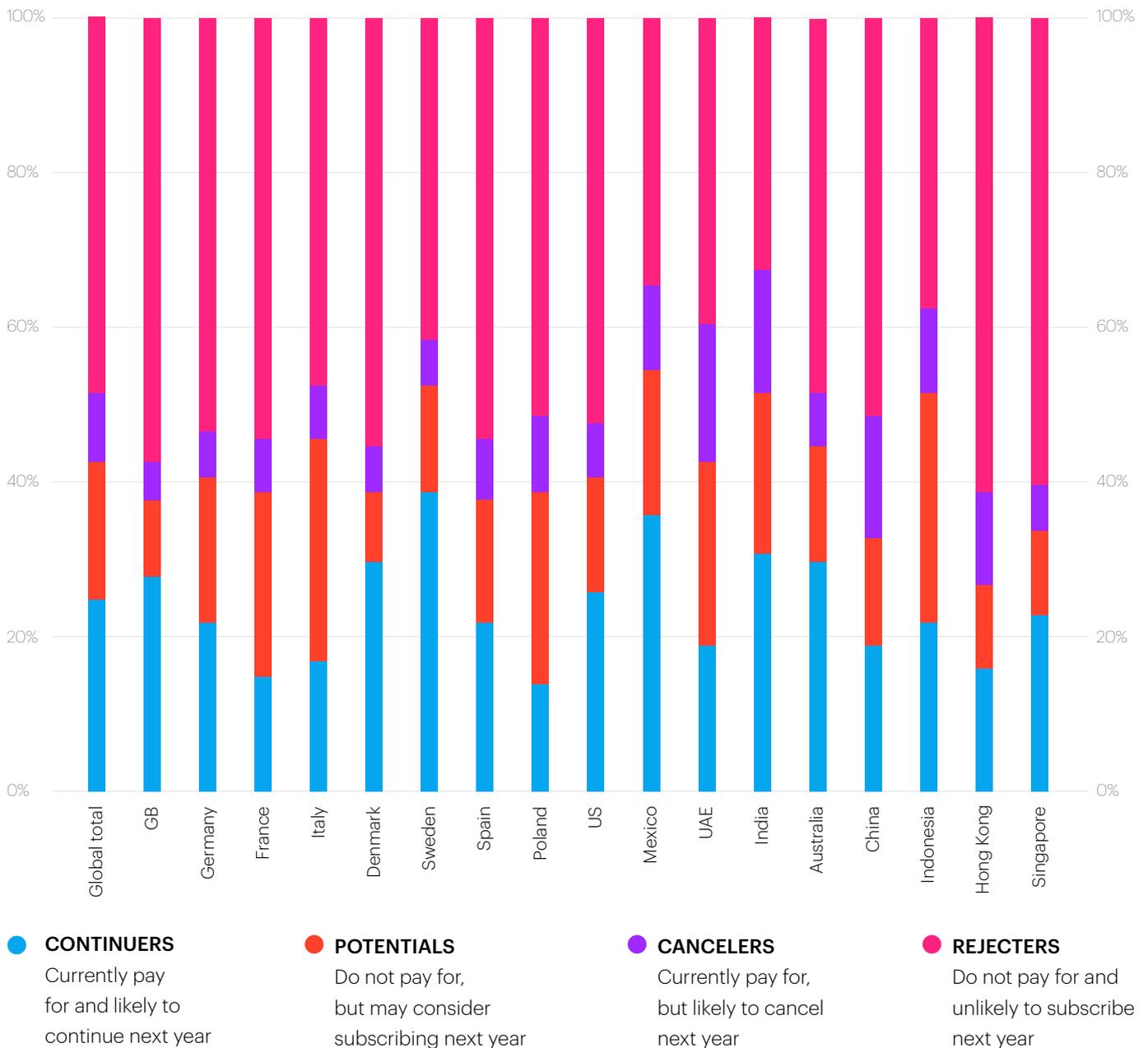


Opportunity for music streaming growth highest in Indonesia, Italy, and Poland

The easy accessibility of free music globally has kept listeners from spending money on paid streaming services. YouGov data shows that in 10 of the 17 markets surveyed, 49% of global consumers do not currently pay for music subscriptions and are unlikely to subscribe next year. Opportunity for growth 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. Paid for music streaming services are most popular Sweden – the hometown of Spotify – where about two in five (39%) of the population currently pay for and are likely to continue their music subscriptions next year. Mexico has second strongest stickiness to music subscriptions (36%), followed by India (31%).

Paid-for music subscription next year by country



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



Read

Over the last two decades, print readership and ad revenue of newspapers and magazines across many regions have been steadily declining, with readers and ad dollars increasingly migrating to digital. The pandemic has exacerbated this decline, adversely affecting several key print advertising categories such as retail, travel, and entertainment. With printing and distribution stalling, and

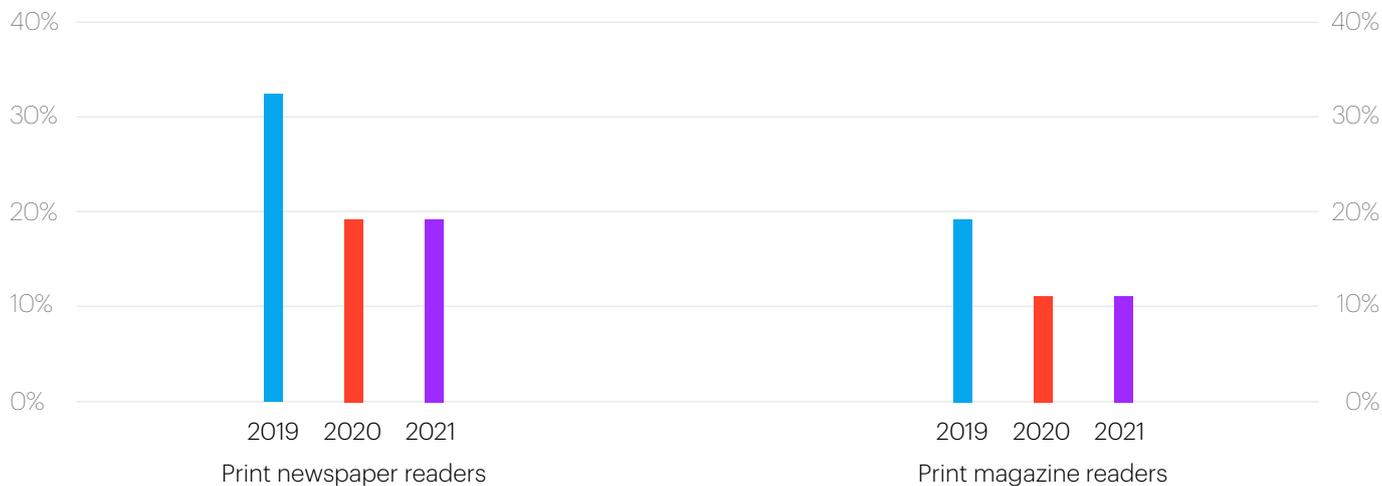
Print readership continues to be challenged

YouGov US Profiles data shows that the penetration of weekly print newspaper readership dropped considerably from 32% to 19% in 2020, although readership penetrations

consumers unable to purchase from newsstands due to lockdown restrictions, this disruption to a very traditional supply chain model has led to a further decline in print readership in 2020. This section reveals consumption trends of newspapers and magazines over the last few years with a particular focus on the US and Great Britain.

levelled in 2021. Weekly print magazine readership followed a similar trend to newspapers, with weekly penetrations falling from 19% in 2019 to 11% in 2020 and stabilizing in 2021.

Print newspaper and magazine weekly readership (US)



Q: In an average week, how much time do you spend reading a physical print edition of a newspaper?

- Any weekly newspaper readers

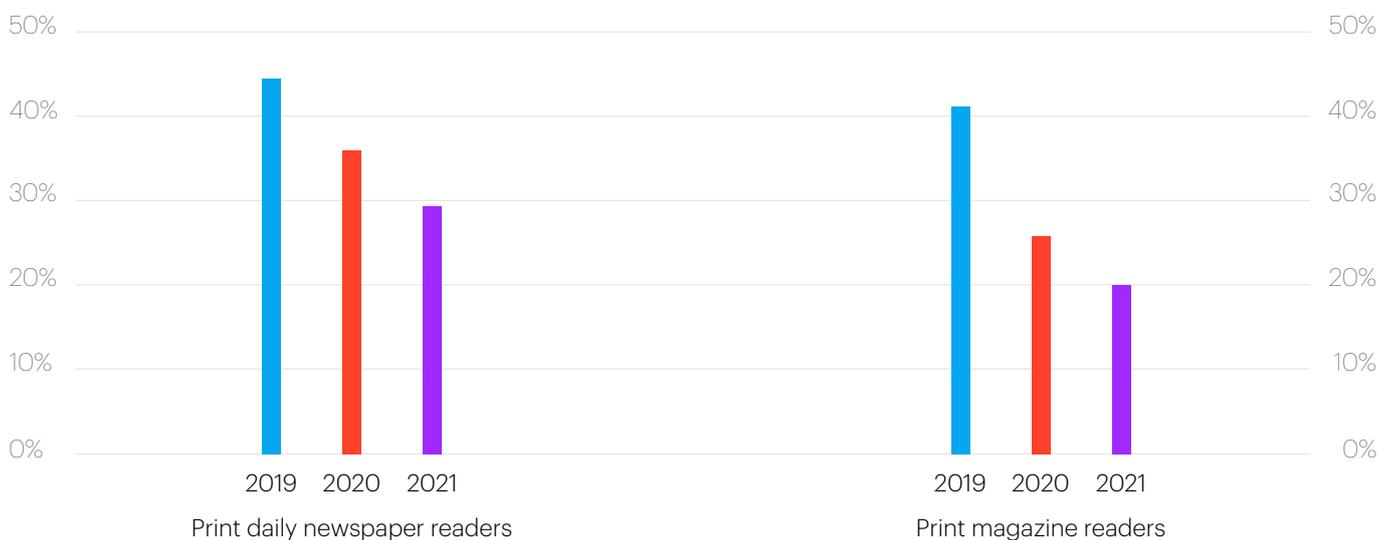
Q: In a typical week, approximately, how many hours would you spend reading a magazine in print? By this we mean, a physical print copy of a magazines, rather than reading online or via any other medium - Any weekly magazine readers



The downward trend in print readership has been more consistent in Great Britain. Weekly readership penetration of daily newspapers declining through the pandemic from

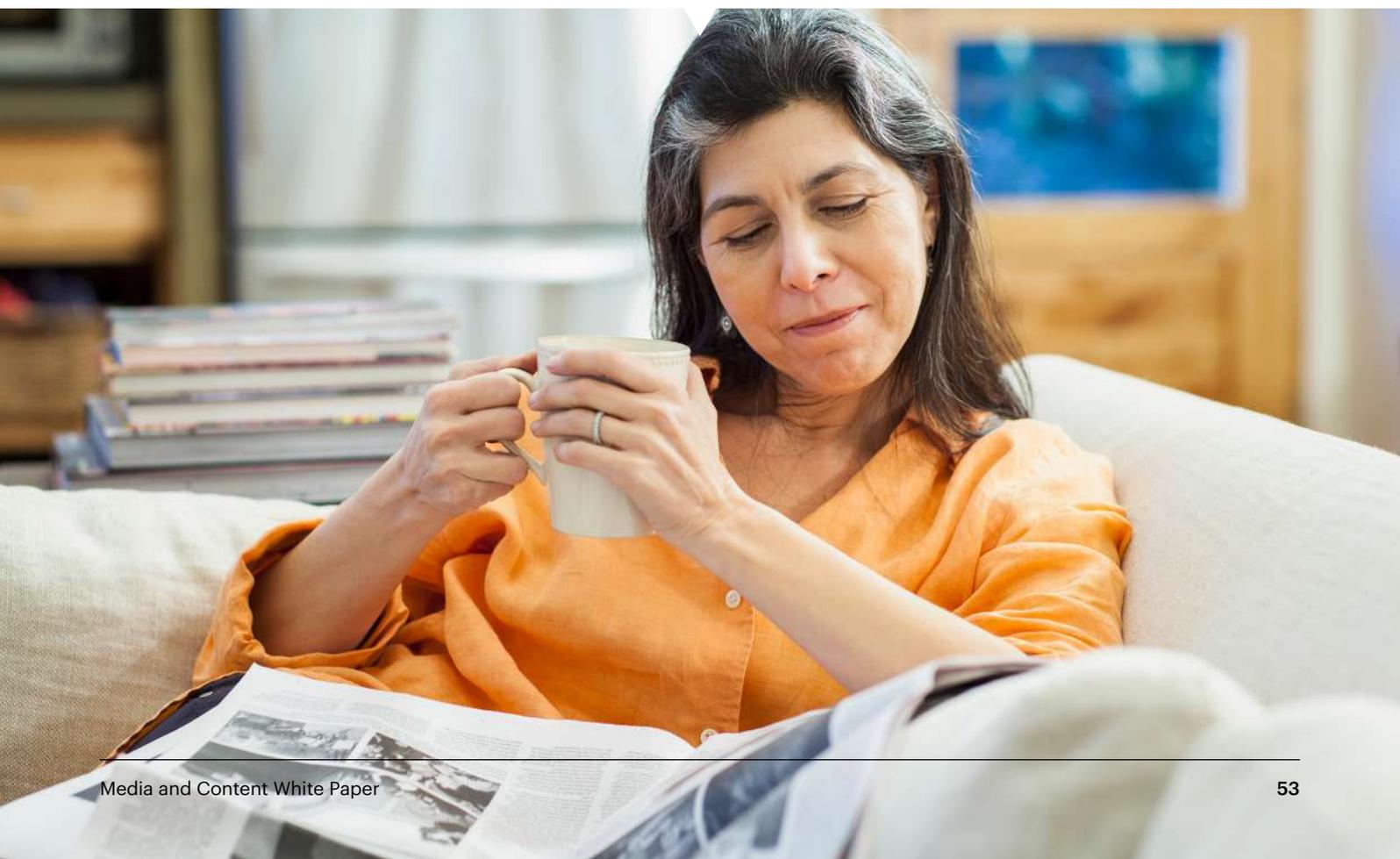
45% in 2019, to 36% in 2020, dropping further to 29% in 2021. Notably, magazine readership has halved from 41% to 20% over the last three years.

Print newspaper and magazine weekly readership (GB)



Q: Approximately, how much time in total, did you spend reading or looking at a daily newspaper printed on paper in the last week? Please do not include reading or looking at a newspaper's website – Any weekly daily newspaper readers

Q: In a typical week, approximately, how many hours would you spend reading a magazine in print? By this we mean, a physical print copy of a magazines, rather than reading online or via any other medium – Any weekly magazine readers



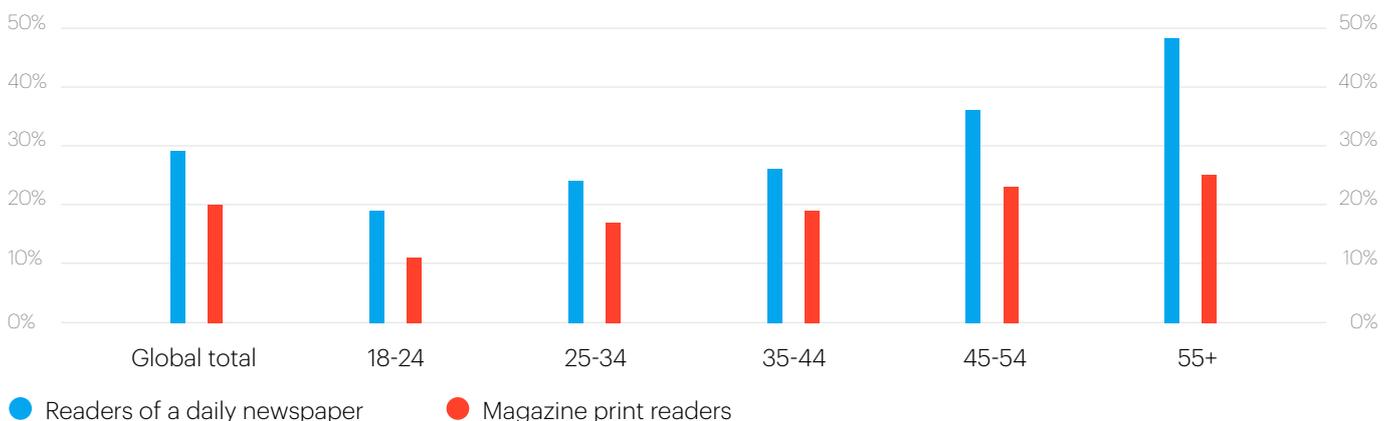


Older age groups are propping up print media

Consumers aged 55+ are the target demographic for newspaper publishers and advertisers alike. They are generally less likely to adapt to digital media. Many are sceptical about online sources and consider newspapers as the only reliable news source. Over the years, driven by

strong habits formed around regular newspaper reading, YouGov Profiles data shows that 48% of GB consumers aged 55+ claim to read a daily newspaper at least once a week in 2021, compared to only 19% of those aged 18-24.

Print newspaper and magazine weekly readership by age (GB)



Q: Approximately, how much time in total, did you spend reading or looking at a daily newspaper printed on paper in the last week? Please do not include reading or looking at a newspaper's website – Any weekly daily newspaper readers

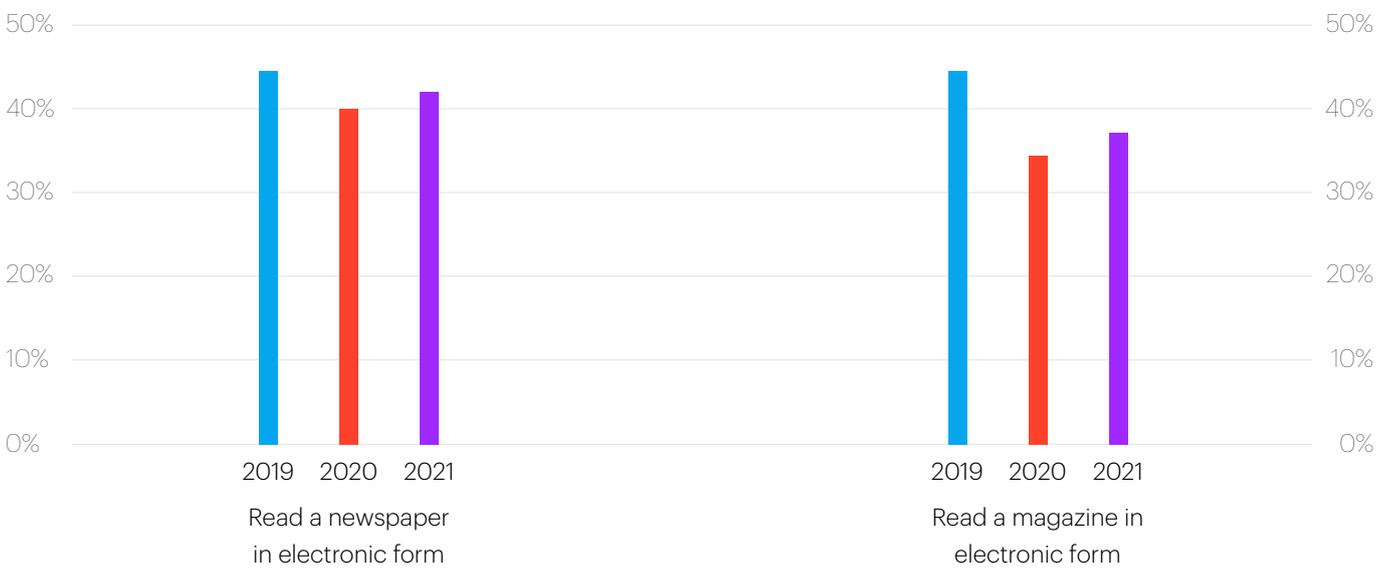
Q: In a typical week, approximately, how many hours would you spend reading a magazine in print? By this we mean, a physical print copy of a magazines, rather than reading online or via any other medium – Any weekly magazine readers

Digital newspapers and magazines face new challenges

To secure a sustainable future, a key priority for most print publishers is digital transformation and understanding how consumers are changing the way they interact with and use digital services. As advertising revenues continue to decline, diversifying revenue streams has become a key priority for many publishers across the regions. Most major magazines and newspapers across the regions have their own websites,

and news and other content is also shared through social platforms such as Facebook or Twitter. However, despite digital diversification, readership of newspapers or magazines in digital format in the US also declined between 2019 and 2021, although penetrations picked up slightly between 2020 and 2021.

Weekly readership of newspapers or magazine in electronic form (US)



Q: Approximately, how much time in total, did you spend reading or looking at daily newspaper in electronic form in the last week?

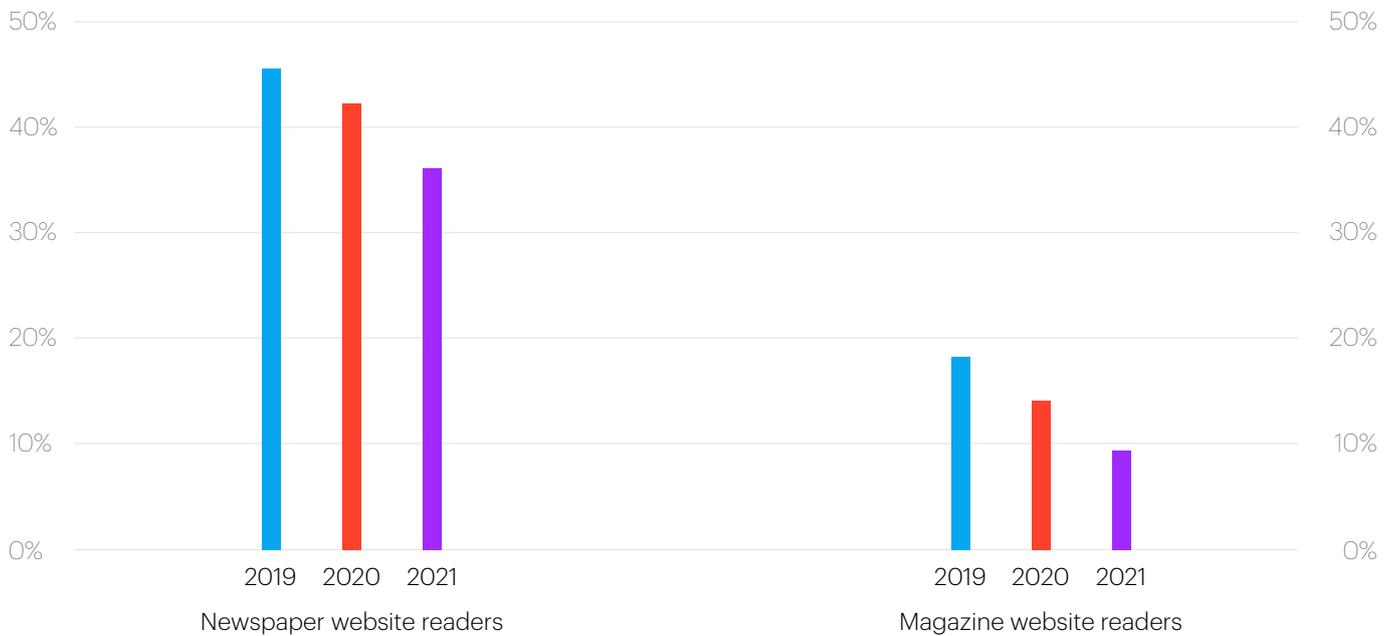
Q: Approximately, how much time in total, did you spend reading or looking at magazines in electronic form in the last week? -Any weekly electronic magazine reader



In GB, consumption of print publisher websites has also declined, with newspaper website weekly penetration falling from 46% in 2019, to 36% in 2021. Magazine websites

also dropped from 2019 and 2021, presenting a new set of audience retention challenges for newspaper and magazine publishers.

Monthly readership of newspapers or magazine website readers (GB)



Q: Which if any, of the following newspaper websites have you visited in past 30 days? – Any newspaper website visitor

Q: How frequently, if at all, do you read magazine content on a website? - Any magazine website reader in the last month



Key take-outs

GLOBAL MEDIA OUTLOOK 2022 – KEY TAKE-OUTS

1 Digital to lead media consumption growth

YouGov data shows that the top media Growth Drivers of media consumption growth in the next 12 months are all digital. Video streaming services have further tightened their grip on viewers in the wake of the pandemic and are likely to register the biggest growth in consumption in the coming year with a Growth Driver score of 36%. The switch over to digital will continue to affect the growth prospects of traditional media channels.

In the coming year, as ‘work from home’ routines and entertainment habits linger, on-demand streaming services (video/music) and social media platforms are set to continue to keep consumers hooked – presenting crucial growth opportunities for media companies and advertisers alike.

3 Gen Z will drive music streaming and podcasts growth

Listening habits of consumers have been significantly impacted by the pandemic. Whilst radio listening has been the hardest hit by the pandemic, spending more time at home has benefited other audio services such as music streaming and podcasts, especially attracting the digital-savvy younger generations.

Globally, almost a fifth (17%) of consumers do not currently pay for but may consider subscribing to music streaming services next year – presenting a considerable growth opportunity for leading service providers such as Spotify and Apple Music. Interestingly, audio content services can also boost audience growth by attracting listeners to their podcast offerings. YouGov data reveals that 30% consumers intend to listen to podcasts more in the coming year. Podcasts present a strong opportunity for brands and advertisers to engage with a highly receptive and engaged set of listeners, particularly younger generations.

2 Watching habits to be fuelled by streaming services

In the US, streaming services such as Netflix, Hulu, and Amazon Prime have all increased penetration since 2018. In the next 12 months, YouGov data shows that a higher proportion of global consumers plan to consume more streaming services than any other type of media. Notably, this higher consumption intention is more pronounced among Gen Z. Moreover, global consumers have the stronger stickiness to video on demand subscriptions than other paid-for content services, with 36% intending to renew in the coming year, and a further 15% (who do not currently pay for VOD), considering a subscription.

As the popularity of streaming video services persists in the coming year, – and consumers are spoilt for choice – intensifying competition among service providers is likely to trigger further investments in content, as well as subscription price adaptations to retain and grow audiences.

4 Live TV penetration remains high

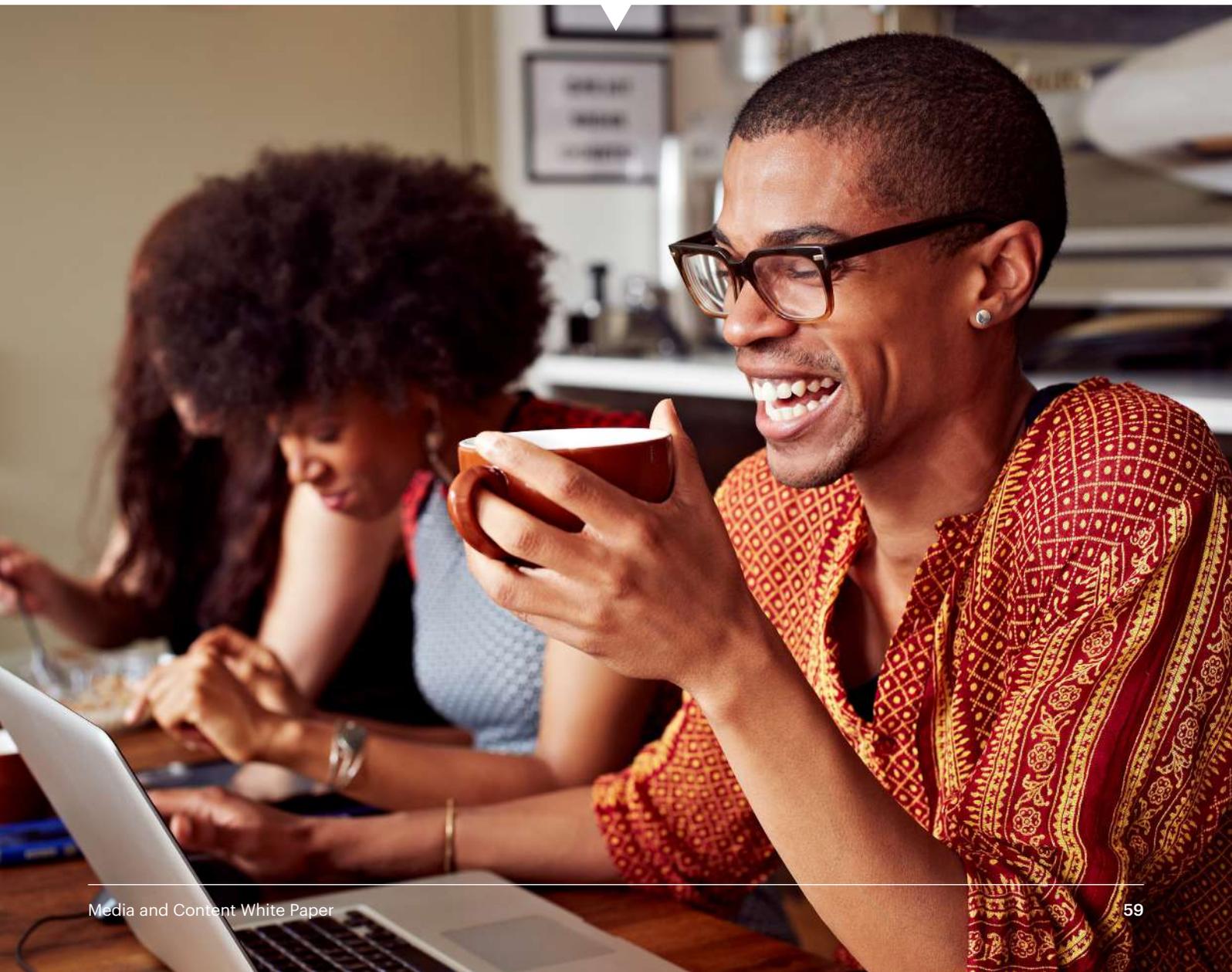
Despite the growth of streaming services and VOD, the increase in the amount of time spent at home due to the pandemic may have also contributed to an increase in the consumption of live TV. Almost nine in ten Brits consume live TV on a weekly basis and this has remained unchanged for the last four years. With access to live TV becoming increasingly available through on demand TV streaming services, the opportunities for live TV growth may continue to evolve.

5 Social media use will continue to rise further

Social media platforms today serve a myriad of purposes – from information sharing to video-based entertainment, to professional networking, to even enabling commerce. In the US, social media is the top source of news for Gen Z (45%) ahead of traditional TV (34%). The appeal and usage of social media is likely to remain robust in the coming year, with social media identified as one of the top three drivers of media consumption growth in our research. Gen Z is the most likely to increase their interaction with social media usage in the next 12 months (39%), followed by the 25-34 age group (33%).

6 Media levelling out in the year ahead

Despite the pandemic, YouGov global data identifies a high proportion of global consumers who are planning to stick with their media choices in the coming 12 months. Whilst COVID-19 fuelled a surge in media consumption over the last 12 months, and in the coming 12 months, our data suggests a 'levelling out' in overall consumption.



Our Data

The insights in this report are drawn from a recent global Custom survey on the global media sector and, specifically, exploring past media consumption patterns and the future global media landscape, covering 17 global markets of more than 19,000 respondents. Our survey results were further bolstered by connecting respondent level data to YouGov’s proprietary syndicated data solutions, Profiles, allowing us to merge our respondents and their answers to the 100,000s consumer attributes that we collect on an ongoing basis for audience segmentation and profiling.

Our survey was fielded the week of 18th October – 08th November 2021

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:

Method used to listen to music by age (US)			
Market	Population Sampled Representation	Survey Start Date	Sample Size
Australia	National representative - 16+	19-Oct	1048
China	National Online - 16+	18-Oct	1034
Denmark	National representative - 18+	19-Oct	1018
France	National representative - 18+	20-Oct	1028
Germany	National representative - 18+	19-Oct	1056
Hong Kong	National Online - 18+	18-Oct	513
India	National Online (Urban only) - 18+	19-Oct	1037
Indonesia	National Online - 18+	18-Oct	1044
Italy	National representative - 18+	20-Oct	1011
Mexico	National (Urban focus) - 18+	19-Oct	1060
Poland	National representative - 18+	20-Oct	1008
Singapore	National representative - 18+	19-Oct	1052
Spain	National representative - 18+	20-Oct	1015
Sweden	National representative - 18+	20-Oct	1022
UAE	National representative - 18+	18-Oct	1152
UK	National representative - 18+	20-Oct	2020
US	National representative - 18+	18-Oct	2001

▶ At YouGov

We are always innovating

- Through our unique data sources and expertise, we support and inform a wide range of strategic decision-making across the entire industry, including digital/social performance monitoring and global post-launch viewership.
- **YouGov Signal**, our social listening tool, collects data from all relevant digital and social sources, aggregates and analyzes the statistics into digestible quantitative metrics, and makes them available in one place. Clients are able to access the full range of digital and social data across all social media, search, Wikipedia and news articles.
- In 2021, YouGov developed proprietary technology, **YouGov Stream**, a fully verified global streaming tracker. It combines permissioned viewership data (from major platforms like Netflix, Amazon, Disney+, Hulu, Paramount+, AppleTV+) with thousands of surveyed demographic and behavioural attributes. With streaming rapidly on the rise, YouGov Stream enables companies to monitor streaming behaviour, including season retention trends and episodic drop-off rates.
- Follow the links above to read more on our new products, and keep an eye out this coming year for case studies, use cases and deep-dives as we explore how these innovations can take your business strategy to the next level.