GWI’s flagship report on the latest trends in global media
In this report

- Discover our data
- Key insights
- Media consumption overview
- TV/video
- News
- Gaming
- Music/audio
- Ads/subscriptions
- Appendix
- Notes on methodology

Methodology

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

Each year, GWI interviews over 900,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GWI’s Core survey via PC/laptop/tablet.

When reading this report, please note that we focus on data from our ongoing global quarterly research, but also refer to our monthly Zeitgeist studies across 12 markets.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of “1.20” means that a given group is 20% above the global average, and an index of “0.80” means that an audience is 20% below the global average.
Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our platform, where you can investigate all data by demographics, over time, and among your own audiences.

Discover the data on our platform

Each of the graphs is numbered
More information can be found in the Appendix section at the end of this report.

Just click this icon to explore the data on the platform

Source
Information about the source and base

Base

Information about the source and base
Smart devices are in high demand.

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

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

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

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

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

Comedy is the most popular podcast genre for younger generations.

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

Social media is how Gen Z finds products.

TikTok and Instagram are becoming the key places for brand discovery — especially among younger generations. Since 2015, the number of people searching for products on social media has risen by 43%. Ads on social are becoming more curated for the consumer and purchasing an item takes less time.
Despite plateauing over the last three years, smartphone ownership is now so ubiquitous that it’s spurred growth of other devices connected to the IoT (Internet of Things).

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

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

Some devices have, however, seen quite a decline. PC/Laptop ownership has dropped by 19% since 2018, despite a brief spike during the pandemic, when pent-up demand was higher. The same can be said for e-Readers, with ownership declining by 20% during this time.
The evolution of media
Average daily time spent on the following (h:mm)

- Broadcast radio
- Games console
- Online TV
- Linear TV
- Social media
- Online press
- Physical press
- Music streaming
- Podcasts*
- Games console
- Online TV
- Linear TV
- Social media
- Online press
- Physical press
- Music streaming
- Podcasts*
- Games console
- Online TV
- Linear TV
- Social media
- Online press
- Physical press
- Music streaming
- Podcasts*

*added in Q1 2020

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

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

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

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

Media habits across demographics

Average daily time spent on the following (h:mm)
PC vs. mobile
Average daily time spent on the following (h:mm)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Overall</th>
<th>APAC</th>
<th>Europe</th>
<th>LatAm</th>
<th>MEA</th>
<th>NorthAm</th>
</tr>
</thead>
<tbody>
<tr>
<td>35-44</td>
<td>2:56</td>
<td>2:59</td>
<td>2:56</td>
<td>2:31</td>
<td>2:31</td>
<td>2:56</td>
</tr>
<tr>
<td>45-54</td>
<td>1:34</td>
<td>1:34</td>
<td>2:12</td>
<td>1:34</td>
<td>1:34</td>
<td>1:34</td>
</tr>
<tr>
<td>55-64</td>
<td>1:34</td>
<td>2:21</td>
<td>3:18</td>
<td>2:21</td>
<td>2:21</td>
<td>2:21</td>
</tr>
</tbody>
</table>

GW1 Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)
3,073,752 internet users aged 16-64
Reach vs. time spent
Average daily time spent on the following (h:mm) and the % who use them

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

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

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

Internet users spend nearly 2½ hours a day on social media

(Links on page 10)

GWI Core Q2 2022
294,291 internet users aged 16-64
Online time has hit a ceiling
Average daily time spent online (h:mm)

Time difference between previous year (in minutes)

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

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

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

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

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

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

In terms of streaming platforms, Netflix remains on top across all regions, with the highest market share in Latin America (79%) and North America (68%). This comes after a year of ups and downs for the platform - from losing 1.2m subscribers in April, to gaining 2.4m new subscribers in Q3 2022.

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

---

**Streaming vs linear**

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>1:56</td>
<td>1:53</td>
<td>1:37</td>
<td>1:32</td>
<td>1:17</td>
<td>0:44</td>
<td>1:11</td>
<td>1:53</td>
<td>1:37</td>
<td>1:32</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>2:18</td>
<td>2:26</td>
<td>1:56</td>
<td>2:05</td>
<td>2:05</td>
<td>2:52</td>
<td>1:19</td>
<td>2:52</td>
<td>1:19</td>
<td>2:52</td>
</tr>
<tr>
<td>Latin America</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
<td>1:02</td>
</tr>
</tbody>
</table>

---

1. GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)
2. 2,291/933 internet users aged 16-64
The saturated and ever-changing media landscape has made it harder to capture and maintain consumers’ attention. Brands are now faced with the challenge of keeping consumers entertained so they come back for more – and they’re competing with all other forms of media to do this.

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

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

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

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

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

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

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

YouTube has a strong presence across markets, while entertainment, film, and news top the list across ages by genre.
### Most popular TV genres
% in each age group who watch the following in a typical week

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Films/movies</th>
<th>Reality</th>
<th>Comedies</th>
<th>Entertainment/variety</th>
<th>Documentaries/factual</th>
<th>News/current affairs</th>
</tr>
</thead>
<tbody>
<tr>
<td>16–24</td>
<td>54</td>
<td>60</td>
<td>63</td>
<td>60</td>
<td>76</td>
<td>76</td>
</tr>
<tr>
<td>25–34</td>
<td>54</td>
<td>60</td>
<td>58</td>
<td>60</td>
<td>76</td>
<td>53</td>
</tr>
<tr>
<td>35–44</td>
<td>54</td>
<td>60</td>
<td>56</td>
<td>66</td>
<td>53</td>
<td>53</td>
</tr>
<tr>
<td>45–55</td>
<td>49</td>
<td>48</td>
<td>45</td>
<td>45</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>55–64</td>
<td>49</td>
<td>48</td>
<td>44</td>
<td>44</td>
<td>40</td>
<td>40</td>
</tr>
</tbody>
</table>

### Most popular video services
% in each region who use the following services

- **Asia Pacific**
  - YouTube: 76%
  - Netflix: 47%
  - Prime Video: 34%
  - Disney: 28%
  - Hulu: 19%

- **Europe**
  - YouTube: 60%
  - Netflix: 47%
  - Prime Video: 24%
  - Disney: 13%
  - HBO MAX: 9%

- **LatAm**
  - Netflix: 79%
  - YouTube: 76%
  - Prime Video: 43%
  - Disney: 41%
  - HBO MAX: 30%

- **MEA**
  - YouTube: 79%
  - Netflix: 51%
  - Prime Video: 25%
  - Disney: 15%
  - Hulu: 15%

- **NorthAm**
  - Netflix: 65%
  - YouTube: 53%
  - Prime Video: 43%
  - Disney: 40%
  - Hulu: 38%
### Streaming in the background

#### Second-screening activities

| % of second screeners in each generation who do the following when watching TV |
|---------------------------------|----------|----------|----------|----------|
| Chat to/message friends         | Gen Z    | Millennials | Gen X    | Baby Boomers |
| Use social media                |          |            |          |            |
| Read my emails                  |          |            |          |            |
| Read the news                   |          |            |          |            |
| Play games                      |          |            |          |            |
| Search for products to buy      |          |            |          |            |
| Search for information related to what I'm watching |          |            |          |            |
| Share my opinion of a TV show   |          |            |          |            |
| Interact with the online content of the TV show |          |            |          |            |

#### Second-screening: devices over time

| % who use the following devices when watching TV |
|---------------------------------|--------------|--------------|--------------|--------------|
| Smartphone                      | 75           | 81           | 83           | 82           | 82           |
| Laptop                          | 34           | 33           | 31           | 28           | 26           |
| Tablet                          | 20           | 18           | 16           | 15           | 15           |
| Desktop PC                      | 18           | 17           | 14           | 12           | 11           |

---

1. GWI Core Q2 2022
2. 16,775 second screeners aged 16-64
3. GWI Core 2018-2022 (averages of all waves conducted each year between Q1 2018-Q2 2022)
4. 3,073,732 internet users aged 16-64
Every social media platform has its own vibe, with unique audiences and niche features that set them apart from the next service. But now the lines are blurring. TikTok’s success with short-form video has led other platforms to look for ways to build video features of their own.

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

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

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

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

The number of TikTok users outside China has grown 12% since Q2 2021
Where consumers get their news

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

More consumers get their news from social media than news websites

In Q2 2022, 58% of consumers consumed news via either social media or a news website. Social media is the dominant channel for news discovery for most consumers worldwide. Apps like Flipboard or Apple News are falling behind though. The number of users reading news apps has increased by 52% between Q2 2018 and Q2 2022. With news consumption on the rise worldwide, consumers might be on the lookout for more diverse news stories that don’t come from a single source.

Online vs. offline press
Average daily time spent on the following (h:mm)

Social vs. site
% who get their news from the following sources
Keeping on top of affairs

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

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

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

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

The post-pandemic news decline

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
<th>Q1 2021</th>
<th>Q2 2021</th>
<th>Q3 2021</th>
<th>Q4 2021</th>
<th>Q1 2022</th>
<th>Q2 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>64</td>
<td>46</td>
<td>44</td>
<td>46</td>
<td>44</td>
<td>44</td>
<td>44</td>
<td>43</td>
<td>41</td>
<td>42</td>
<td>41</td>
<td>42</td>
<td>41</td>
<td>41</td>
</tr>
<tr>
<td>Q2</td>
<td>68</td>
<td>64</td>
<td>65</td>
<td>64</td>
<td>62</td>
<td>59</td>
<td>59</td>
<td>59</td>
<td>60</td>
<td>60</td>
<td>60</td>
<td>60</td>
<td>60</td>
<td>60</td>
</tr>
</tbody>
</table>

GWI Core Q1 2019-Q2 2022
2,599,159 internet users aged 16-64
There are some generational attitudes at play here; boomers are the most skeptical of what’s said on the news while millennials are the most trusting. The main issue appears to be social media however. 45% of Americans say they have no trust in social media companies – that’s more than for any other institution, and up 8% on figures in Q2 2020. Given most news consumption comes from social media, it’s possible that trust in the news shares a relationship with attitudes towards social media companies on the whole.

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

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

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

BARNEY BARRON
Senior Director Global Insights at Cision, EMEA
Gaming

For Gen Z & millennials, daily time spent on games consoles has passed its pandemic peak
Average daily time spent on games consoles by generation (h:mm)

Gaming on major devices has fallen
% who use the following devices for gaming
Gaming boomed during the pandemic, so how popular is it in today’s media landscape?

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

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

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

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

Gaming has changed, find out how
Console gamers prefer to watch on-demand/streaming services...
% of console gamers in each region who use the following

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

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

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

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

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

Consoles are users’ media hub

Live TV viewing on games consoles grew 18% since Q2 2021
Esports are typically preferred by younger audiences, with nearly half of Gen Z and millennial gamers saying they’re very or extremely interested. For brands, understanding esports fans’ behaviors will likely give them a better understanding of how they consume other media.

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

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

We saw TikTok introduce LIVE Subscription earlier this year, a monthly fee enabling users to show support for their favorite live creators, with their TikTok made me play it global gaming event, one of their first major gaming endeavors. TikTok is matching content creators with viewers in new spaces, attracting gamers’ attention when away from their consoles. For video game fans who like esports, their main fandom appeal is being part of a community with a common interest. Platforms and brands that can foster this relationship between the content creators and users to create a sense of community, will be able to stay front of mind with gaming and esports fans alike.

<table>
<thead>
<tr>
<th>Social Media Platform</th>
<th>% of esports fans who use for information and content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discord</td>
<td>1.43</td>
</tr>
<tr>
<td>Snapchat</td>
<td>1.42</td>
</tr>
<tr>
<td>Twitch</td>
<td>1.41</td>
</tr>
<tr>
<td>Reddit</td>
<td>1.26</td>
</tr>
<tr>
<td>Twitter</td>
<td>1.22</td>
</tr>
<tr>
<td>TikTok</td>
<td>1.19</td>
</tr>
<tr>
<td>Instagram</td>
<td>1.16</td>
</tr>
<tr>
<td>Facebook</td>
<td>1.09</td>
</tr>
<tr>
<td>YouTube</td>
<td>1.06</td>
</tr>
</tbody>
</table>

Discord is the standout social media app for esports fans
Music/audio

The state of streaming and radio

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

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

Gen Z stream music for nearly 2 hours every day

---

Time spent on radio vs. streaming
Average daily time spent listening to the following (h:mm)

- Broadcast radio
- Music streaming

<table>
<thead>
<tr>
<th>Year</th>
<th>Broadcast Radio</th>
<th>Music Streaming</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>0:55</td>
<td>1:14</td>
</tr>
<tr>
<td>2019</td>
<td>1:02</td>
<td>1:26</td>
</tr>
<tr>
<td>2020</td>
<td>1:00</td>
<td>1:32</td>
</tr>
<tr>
<td>2021</td>
<td>1:00</td>
<td>1:33</td>
</tr>
<tr>
<td>Q1 2022</td>
<td>1:01</td>
<td>1:34</td>
</tr>
<tr>
<td>Q2 2022</td>
<td>1:01</td>
<td>1:37</td>
</tr>
</tbody>
</table>

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

---

[2018-2023 internet users aged 16-64]
Spotify has entered the audiobook world. The music streaming giant offers music, comedy shows, podcasts, and numerous other forms of spoken entertainment. Now they’ve added audiobooks to the list – effectively accommodating all forms of audio on one platform. With 44% of consumers using the platform every month and 195 million paid subscribers, Spotify is the world’s top streaming service, way ahead of its competitors.

Outside of China, YouTube Music is quickly making an impression on older generations, with just a one percentage point difference between Spotify and YouTube Music among baby boomers. Meanwhile, Apple Music has stayed relatively steady despite a slight dip in Q2 and Q3 2020, while Soundcloud has found success in the MEA.
Top 3 music services by region
% who've used the following music services in the past month

NorthAm
- Spotify: 36%
- YouTube Music: 21%
- Pandora: 19%

LatAm
- Spotify: 60%
- YouTube Music: 40%
- Deezer: 18%

Europe
- Spotify: 32%
- YouTube Music: 23%
- iTunes: 10%

MEA
- YouTube Music: 37%
- Soundcloud: 32%
- Spotify: 31%

APAC
- Spotify: 31%
- YouTube Music: 22%
- QQ Music: 19%
Playlists are still the preferred way for consumers to listen to music, but close behind are playlists created by the platform they’re using. When you take a look at platform-curated playlists, many of those are less about genre and more about the desired mood. Some of Spotify’s popular curated playlists are titled, “Confidence Boost,” “scarf season,” “Sad Hour,” and “Feelin’ Myself.” Mood-based music is becoming more popular as genres are becoming harder to define. Why look through Spotify’s 5,071 subgenres when you can set the vibe with a perfectly curated playlist? When given the option of genre, most audiences stick to a specific generation. Excluding 16-24s, every age group stuck to 80s or 90s music. Hip-hop/rap was most preferred by 16-24s, most likely due to the fact they don’t have a certain period of music to look back on from their younger years, except 00s music. Five of the top ten most-streamed artists on Spotify all fall under the hip-hop/rap category. Coming close to entering the top five for 16-24s is K-pop. With a dedicated fan base, K-pop has been gaining popularity for years now – potentially because of the genre’s focus on self-love and social issues. In fact, it’s become such a global phenomenon that a new Exchange Traded Fund has been created so US investors can back companies tied to bands like BTS and BlackPink. This shows how the genre is breaking cultural barriers and extending beyond South Korea.

People trust their own taste in music

Preferred audio content

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

Music/audio

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

Top 5 music genres

% in each age group who like listening the following

16-24s

- Hip-Hop/Rap: 31%
- 90s music: 29%
- Rock: 27%
- Pop/Top 40: 23%
- 00s music: 23%

25-34s

- 90s music: 36%
- Rock: 30%
- Hip-Hop/Rap: 26%
- Pop/Top 40: 25%
- 80s music: 24%

35-44s

- 90s music: 41%
- 80s music: 34%
- Rock: 31%
- Pop/Top 40: 26%
- 00s music: 24%

45-54s

- 80s music: 47%
- 90s music: 45%
- Rock: 33%
- Pop/Top 40: 26%
- 50s, 60s, 70s music: 26%

55-64s

- 80s music: 51%
- 50s/60s/70s music: 41%
- 90s music: 39%
- Rock: 34%
- Pop/Top 40: 23%
A report by the Interactive Advertising Bureau projected the podcasting industry will make $4 billion annually by 2024. This is a huge leap from the headlines in 2021 stating podcasting hit the $1 billion mark. Much of this growth comes from increased time listening to podcasts as well as advances in ad technology so advertisers can better target audiences.

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

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

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

**Podcasts are here to stay**

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

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

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

**Podcasts are here to stay**

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

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

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

% of US podcast listeners who use the following platforms

- YouTube: 49%
- Spotify: 43%
- Apple Podcasts: 24%
- Pandora: 14%
- Audible: 9%
- Google Podcasts: 7%
- NPROne: 6%
- Stitcher: 4%
- TuneIn: 3%
- Deezer: 2%

Podcast genres in the US

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

- News & politics: 35-44s: 17%, 25-34s: 14%, 55-64s: 16%
- Comedy: 35-44s: 36%, 25-34s: 43%, 45-54s: 18%
- Music: 35-44s: 26%, 25-34s: 27%, 45-54s: 20%
- Talk show: 35-44s: 18%, 25-34s: 19%, 45-54s: 18%
- True crime: 35-44s: 17%, 25-34s: 18%, 45-54s: 17%
- Games & hobbies: 35-44s: 16%, 25-34s: 17%, 45-54s: 16%
- Sports: 35-44s: 16%, 25-34s: 17%, 45-54s: 16%
- History: 35-44s: 18%, 25-34s: 19%, 45-54s: 20%
- Religion, spirituality: 35-44s: 16%, 25-34s: 17%, 45-54s: 16%
- Travel: 35-44s: 16%, 25-34s: 17%, 45-54s: 16%
- Health & living: 35-44s: 16%, 25-34s: 17%, 45-54s: 16%
Ads/subscriptions

Brand discovery

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

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

Move over ecommerce, scommerce has arrived

Download report
TikTok is spearheading this shift in finding information online. The appeal of TikTok is real people recounting their real experiences, instead of a search engine offering up hundreds of links that may get you the answer you’re looking for. In a New York Times article, Kalley Huang explains that while Google is still the most prominent search engine, they’re taking notice of TikTok doing the things they can’t, like showing the atmosphere of a restaurant in a short clip or the real material of a clothing purchase. It’s becoming much more likely for a young person to type into TikTok “best place for lunch in San Francisco” or “best skincare for dry skin” and see a person’s review, followed by checking the accuracy of the review in the comment section.
Several new shopping options have appeared in the social media universe. Since 2015, the number of people using social media for product searches has risen by 43%. Today, people use Instagram to find product information just as much as they use it to find entertaining content.

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

Social media platforms are arranging their page to make shopping easier

Window scrolling

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

Since Q4 2020, there’s been a 7% increase in TikTok users who follow brand accounts, something that may prove fruitful thanks to further advertising opportunities like TikTok’s shopping ads. As users scroll, they see numerous ads that reflect their shopping preferences. You can even be watching a non-ad related video, and TikTok will pick out keywords for a user to be taken to different results. Among TikTok users, 46% of Gen Z and millennials make an impulse purchase online at least every 2-3 weeks, and this number is likely to increase as social media ads become increasingly more personalized.
While around a third of consumers say they paid for a TV/movie streaming service in the last month, globally that number has plateaued somewhat since mid 2020. This does differ by market though; in the US, for example, the number paying for a streaming service has increased by 11% since the start of the pandemic. However, with the cost of living ramping up, platforms will need a new game plan to keep consumers on board.

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

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

1. Which of the following devices do you own?

2. On an average day, how long do you spend on the following?

3. On an average day, how long do you spend on the following?

4. On an average day, how long do you spend on the following?

5. On an average day, how long do you spend on the following?

6. On an average day, how long do you spend online on a PC/laptop/tablet/mobile?

7. On an average day, how long do you spend watching TV?

8. On an average day, how long do you spend watching online TV/streaming | broadcast/linear TV? | In the last month, which of these services have you used to watch/download TV shows, films or videos? (YouTube)

9. In the last month, which of these services have you used to watch/download TV shows, films or videos?

10. In a typical week, which of these genres will you have watched on television?

11. Which of these things do you do online when watching TV?

12. Which of these devices do you often use while watching television?

13. What have you done on Facebook/Facebook Messenger in the last month? | What have you done on Instagram in the last month? | What have you done on Snapchat in the last month? | What have you done on LinkedIn in the last month? | What have you done on Reddit in the last month?

14. In the last month, which of these genres will you have watched on television?

15. Which of these things are you interested in?

16. Which of these things are you interested in?

17. Which of these things are you interested in?

18. Which of these things are you interested in?

19. Which of these things are you interested in?

20. Which social media platforms do you use for information and content?

21. On an average day, how long do you spend online on a PC/laptop/tablet/mobile?

22. On an average day, how long do you spend on online press?

23. On an average day, how long do you spend listening to the radio? | On an average day, how long do you spend on music streaming services?

24. Which of these things are you interested in?

25. In the last month, which of these services have you used to listen to/download music, radio or audiobook content?

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

27. Which types of podcast do you listen to?

28. Which platforms/services do you use to do the following? (Follow/find more information about brands and products)

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

30. How do you typically find out about new brands and products?
Notes on methodology

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

Our research
Each year, GWI interviews over 900,000 internet users aged 16-64 across 48 markets. Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles and digital behaviors. We source these respondents in partnership with a number of industry-leading panel providers.

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

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

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

Sample size by market
This report draws insights from GWI’s Q2 2022 wave of research across 48 countries, with a global sample of 244,231 respondents.

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>1,841</td>
</tr>
<tr>
<td>Australia</td>
<td>27,626</td>
</tr>
<tr>
<td>Austria</td>
<td>2,100</td>
</tr>
<tr>
<td>Belgium</td>
<td>2,102</td>
</tr>
<tr>
<td>Brazil</td>
<td>9,799</td>
</tr>
<tr>
<td>Canada</td>
<td>6,566</td>
</tr>
<tr>
<td>China</td>
<td>25,215</td>
</tr>
<tr>
<td>Colombia</td>
<td>3,944</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>1,315</td>
</tr>
<tr>
<td>Denmark</td>
<td>1,877</td>
</tr>
<tr>
<td>Egypt</td>
<td>1,845</td>
</tr>
<tr>
<td>France</td>
<td>10,899</td>
</tr>
<tr>
<td>Germany</td>
<td>10,898</td>
</tr>
<tr>
<td>Ghana</td>
<td>1,053</td>
</tr>
<tr>
<td>Greece</td>
<td>1,339</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>2,063</td>
</tr>
<tr>
<td>India</td>
<td>15,393</td>
</tr>
<tr>
<td>Indonesia</td>
<td>6,577</td>
</tr>
<tr>
<td>Ireland</td>
<td>1,440</td>
</tr>
<tr>
<td>Israel</td>
<td>1,590</td>
</tr>
<tr>
<td>Italy</td>
<td>10,532</td>
</tr>
<tr>
<td>Japan</td>
<td>10,566</td>
</tr>
<tr>
<td>Kenya</td>
<td>924</td>
</tr>
<tr>
<td>Malaysia</td>
<td>4,494</td>
</tr>
<tr>
<td>Mexico</td>
<td>5,256</td>
</tr>
<tr>
<td>Morocco</td>
<td>1,063</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2,631</td>
</tr>
<tr>
<td>New Zealand</td>
<td>1,975</td>
</tr>
<tr>
<td>Nigeria</td>
<td>1,876</td>
</tr>
<tr>
<td>Philippines</td>
<td>3,965</td>
</tr>
<tr>
<td>Poland</td>
<td>3,166</td>
</tr>
<tr>
<td>Portugal</td>
<td>2,378</td>
</tr>
<tr>
<td>Romania</td>
<td>1,315</td>
</tr>
<tr>
<td>Russia</td>
<td>4,331</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>1,763</td>
</tr>
<tr>
<td>Singapore</td>
<td>3,546</td>
</tr>
<tr>
<td>South Africa</td>
<td>1,843</td>
</tr>
<tr>
<td>South Korea</td>
<td>2,370</td>
</tr>
<tr>
<td>Spain</td>
<td>10,712</td>
</tr>
<tr>
<td>Sweden</td>
<td>2,628</td>
</tr>
<tr>
<td>Switzerland</td>
<td>1,576</td>
</tr>
<tr>
<td>Taiwan</td>
<td>2,763</td>
</tr>
<tr>
<td>Thailand</td>
<td>4,600</td>
</tr>
<tr>
<td>Turkey</td>
<td>2,109</td>
</tr>
<tr>
<td>UAE</td>
<td>1,781</td>
</tr>
<tr>
<td>UK</td>
<td>1,0543</td>
</tr>
<tr>
<td>USA</td>
<td>2,6395</td>
</tr>
<tr>
<td>Vietnam</td>
<td>3,284</td>
</tr>
</tbody>
</table>
Mobile survey respondents

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

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

Internet penetration rates: GWI versus ITU figures

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

Internet penetration rates across GWI’s markets

GWI’s research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly. Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration rate, its online population can be very different to its total population; broadly speaking, the lower the country’s overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. This is the case throughout much of LatAm, MEA and Asia Pacific.

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

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

We’ve got you covered. Reach out and we’ll explain the options.

Find out more