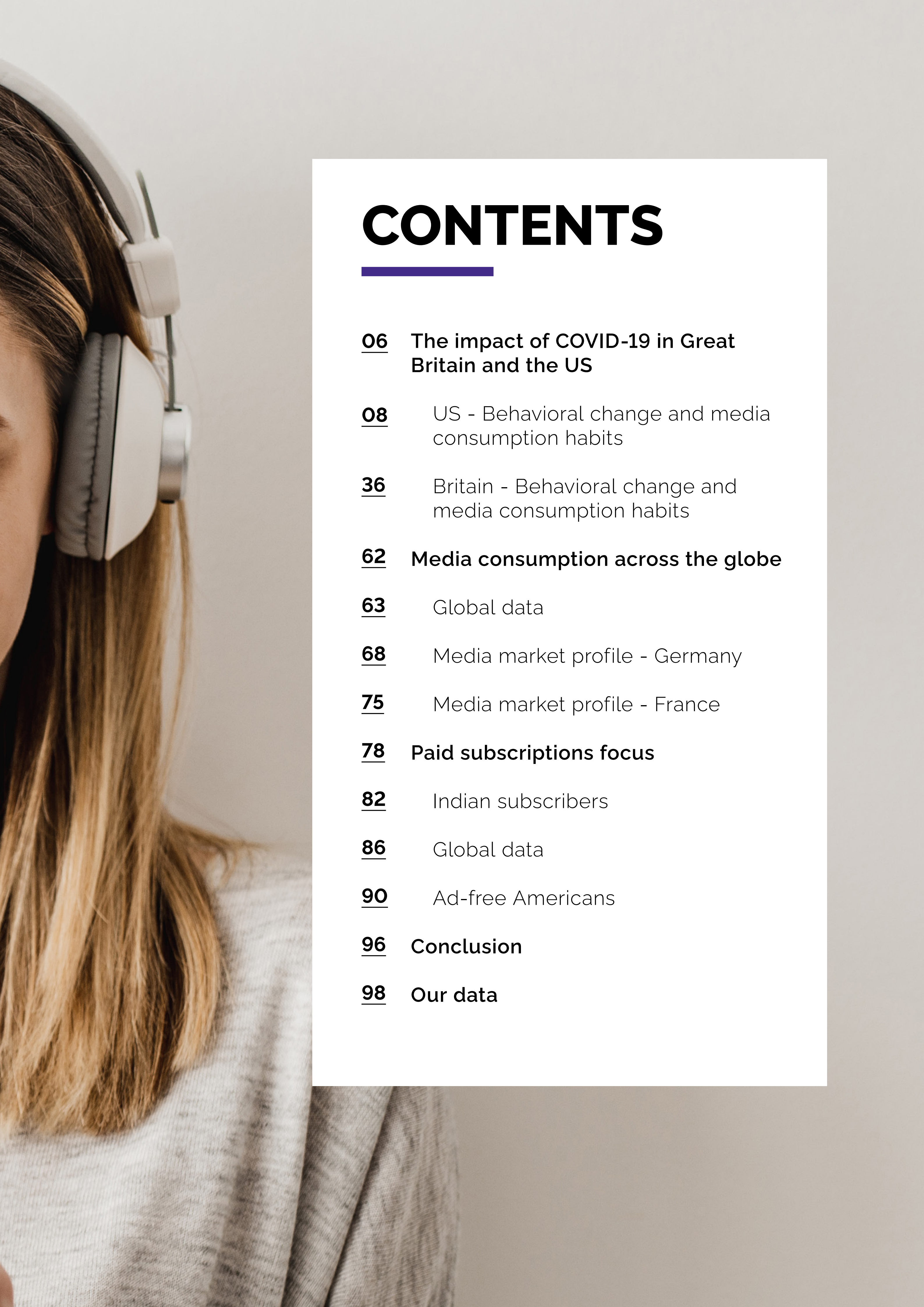
MEDIA & CONTENT

INTERNATIONAL MEDIA CONSUMPTION REPORT 2021

Is there a new normal?

YouGov



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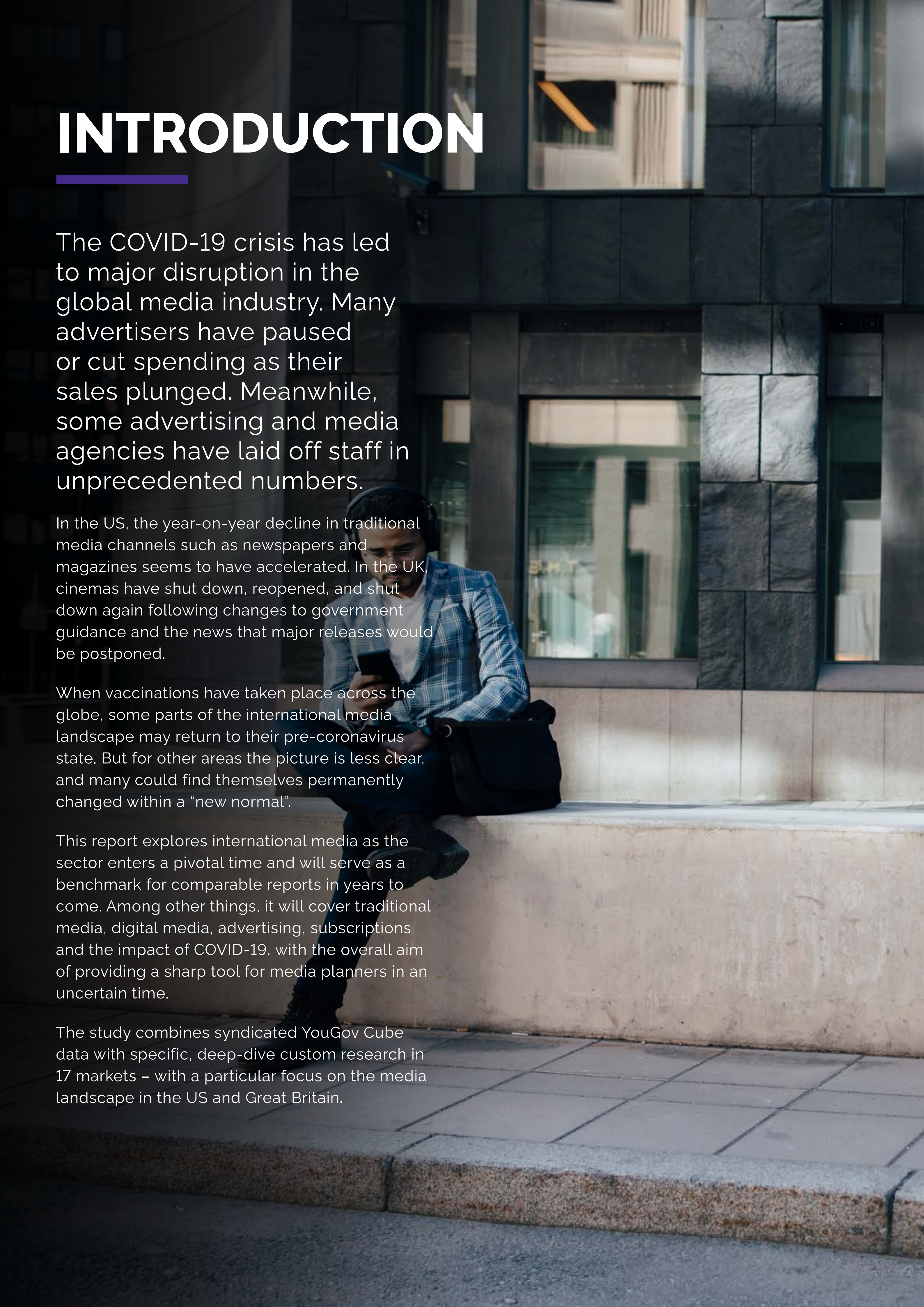


INTRODUCTION

The COVID-19 crisis has led to major disruption in the global media industry. Many advertisers have paused or cut spending as their sales plunged. Meanwhile, some advertising and media agencies have laid off staff in unprecedented numbers.

In the US, the year-on-year decline in traditional media channels such as newspapers and magazines seems to have accelerated. In the UK, cinemas have shut down, reopened, and shut down again following changes to government guidance and the news that major releases would be postponed.

When vaccinations have taken place across the globe, some parts of the international media landscape may return to their pre-coronavirus state. But for other areas the picture is less clear, and many could find themselves permanently changed within a "new normal".

This report explores international media as the sector enters a pivotal time and will serve as a benchmark for comparable reports in years to come. Among other things, it will cover traditional media, digital media, advertising, subscriptions and the impact of COVID-19, with the overall aim of providing a sharp tool for media planners in an uncertain time.

The study combines syndicated YouGov Cube data with specific, deep-dive custom research in 17 markets – with a particular focus on the media landscape in the US and Great Britain.

In most markets, samples are nationally representative but some samples are online representative and national urban representative. For more details, see the table at the end of the report. Though we endeavor to ensure our samples are as representative as possible, YouGov surveys are online only, so there may be a skew towards digital behaviors

THE IMPACT OF COVID-19 IN GB AND THE US

The pandemic has dramatically changed many people's behaviors across the world. In turn, these changes are likely to have affected the way we consume media. In this chapter, we look at how and by how much – with a specific focus on the US and Great Britain.

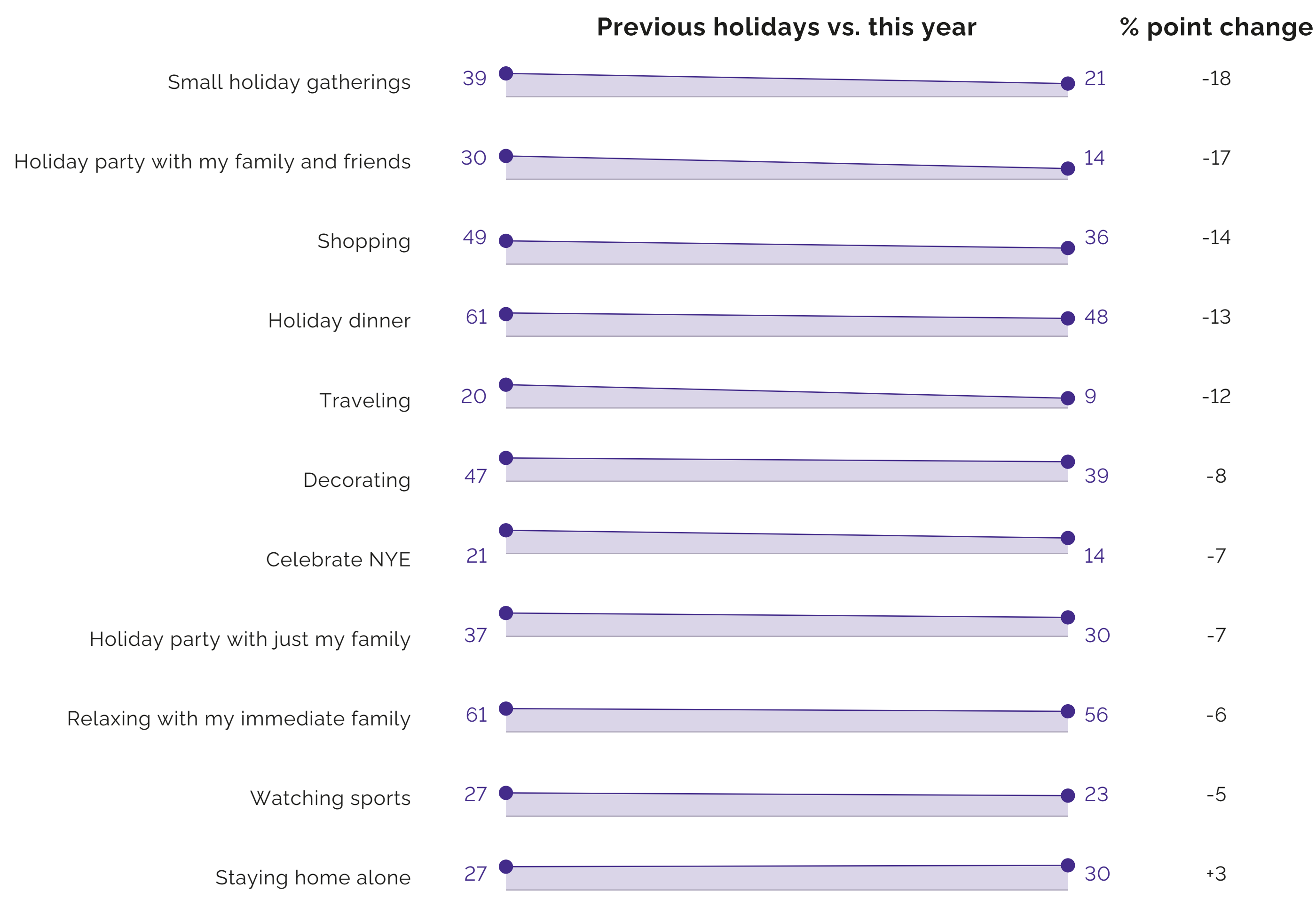
COVID-19 has given some media companies something close to a captive audience. Where people have not been legally restricted from venturing outside, many have been uneasy about engaging in certain consumer behaviors – and altogether prohibited from engaging in others. But such huge changes in the way we go about our lives do not necessarily make life easy for media companies or the media buyers who rely on their content.

Major films have been postponed, popular TV productions have shut down and newspaper publishers have been hit hard by the effects of the pandemic: suffering major disruption to their distribution systems, a loss of advertisers, and, in some cases, mass layoffs.

Data shown to the right, examines Americans' declining intention to participate in holiday activities in 2020, raises questions about not just how to market - but what to market.

Fewer Americans plan to participate in their usual holiday activities this year (2020)

Which, if any, of the following activities do you typically participate in / plan to participate in during the winter holiday season? Please select all that apply (%)



On a consumer level our global COVID-19 data shows that, over the course of this crisis, people have become increasingly worried about the prospect of a recession. Beyond macroeconomic worries, they've also become more concerned about their household financial situation in the short and long term, saved more money, and limited their spending on shopping and entertainment.

With these concerns in mind, this chapter will explore the effects of the COVID-19 pandemic on the media landscape in the US and Great Britain.

US - Behavioral change and media consumption habits

Few societies have remained unaffected by COVID-19. Its consequences have been wide-ranging, from fears around food supplies to completely re-calibrating the patterns of family life.

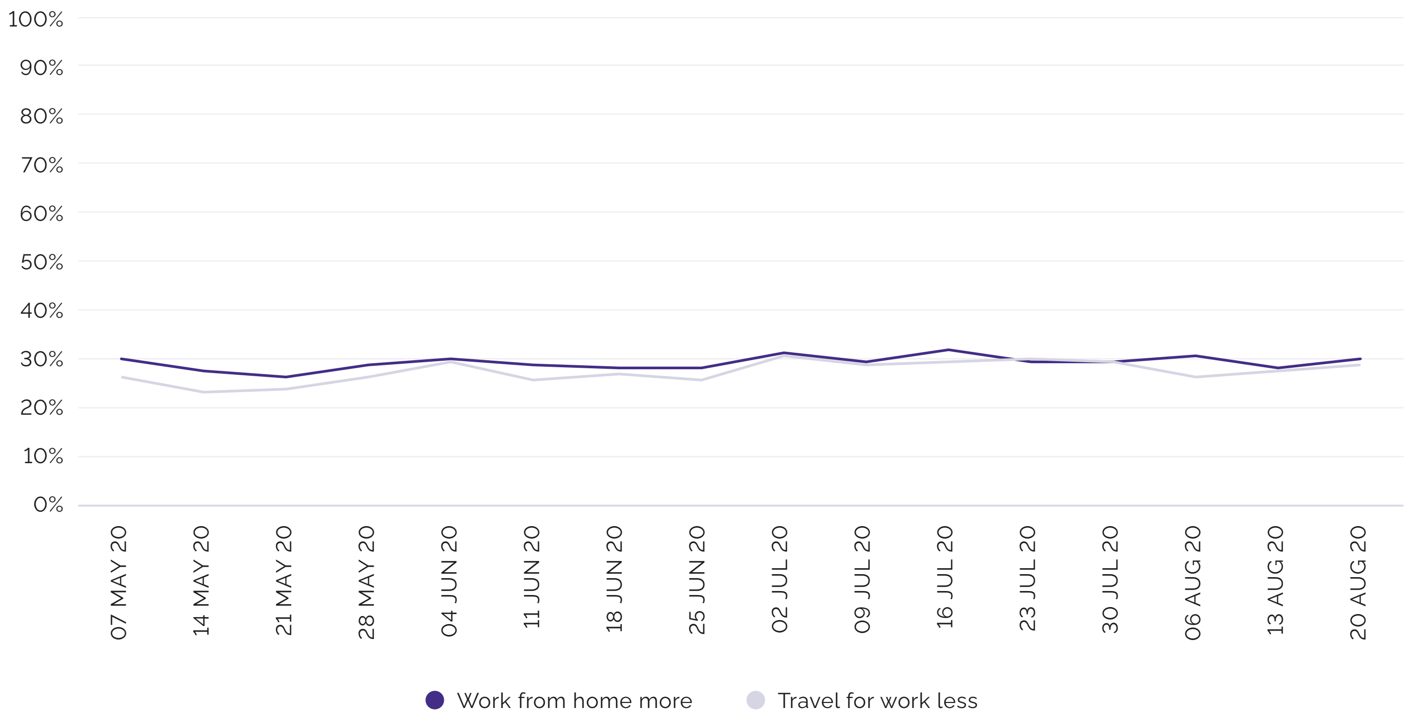
Here, we quantify a handful of the changes in the US that many of us will recognize from our own experiences, wherever we live.

1

Homeward bound? More Americans believe they're unlikely to commute - in future

It's clear that many workers have successfully made the shift from office to home working (and equally clear that it's simply not possible for many others). Overall, among American workers who now operate from their homes, 47% tell us that they would be interested in doing so permanently, compared to just 12% who would not.

Rising to a third of US workers believe they will 'travel much less for work' and 'will work from home a lot more'



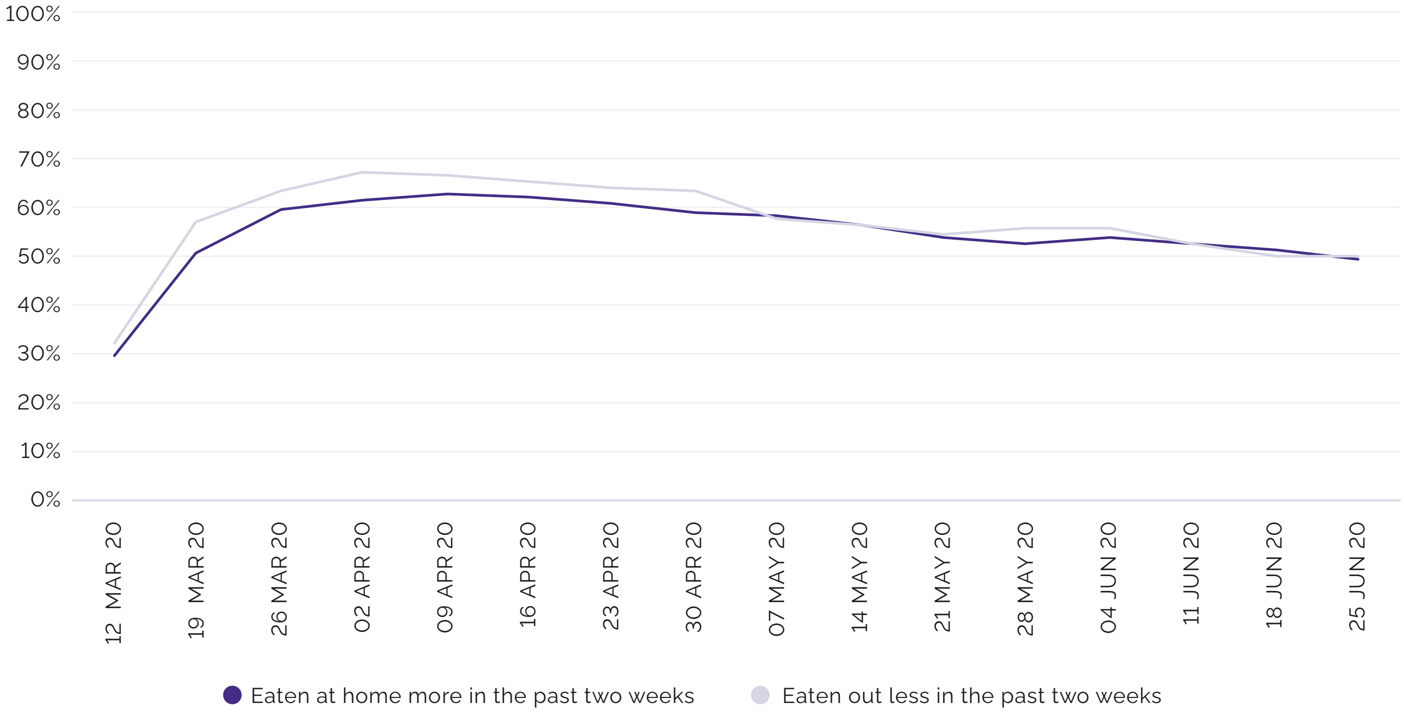
Our data suggests that between May and August 2020, more workers – rising to a third of Americans – believed that they would “travel much less for work” and “work from home a lot more” in the future.

2

Eating

As the pandemic progressed over these months, American consumers reported that they were eating at home more and eating out less.

Changing American eating habits

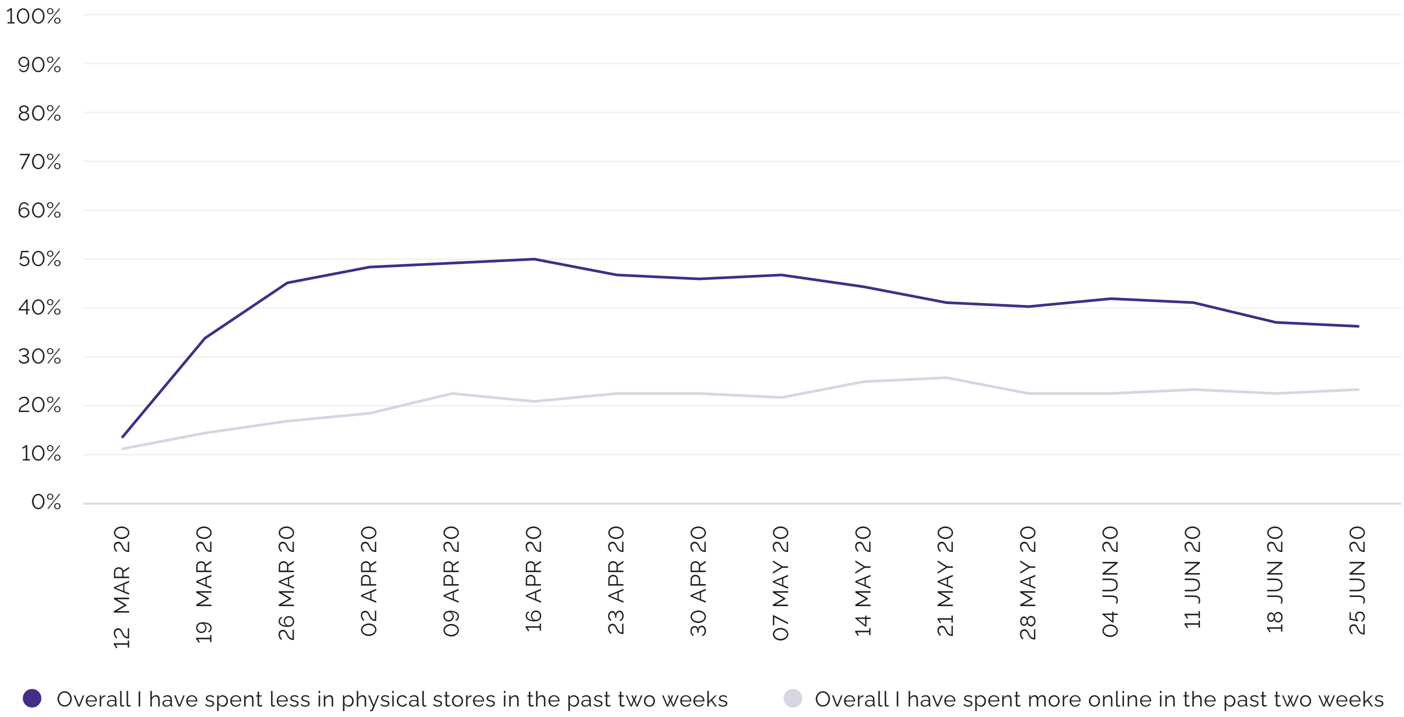


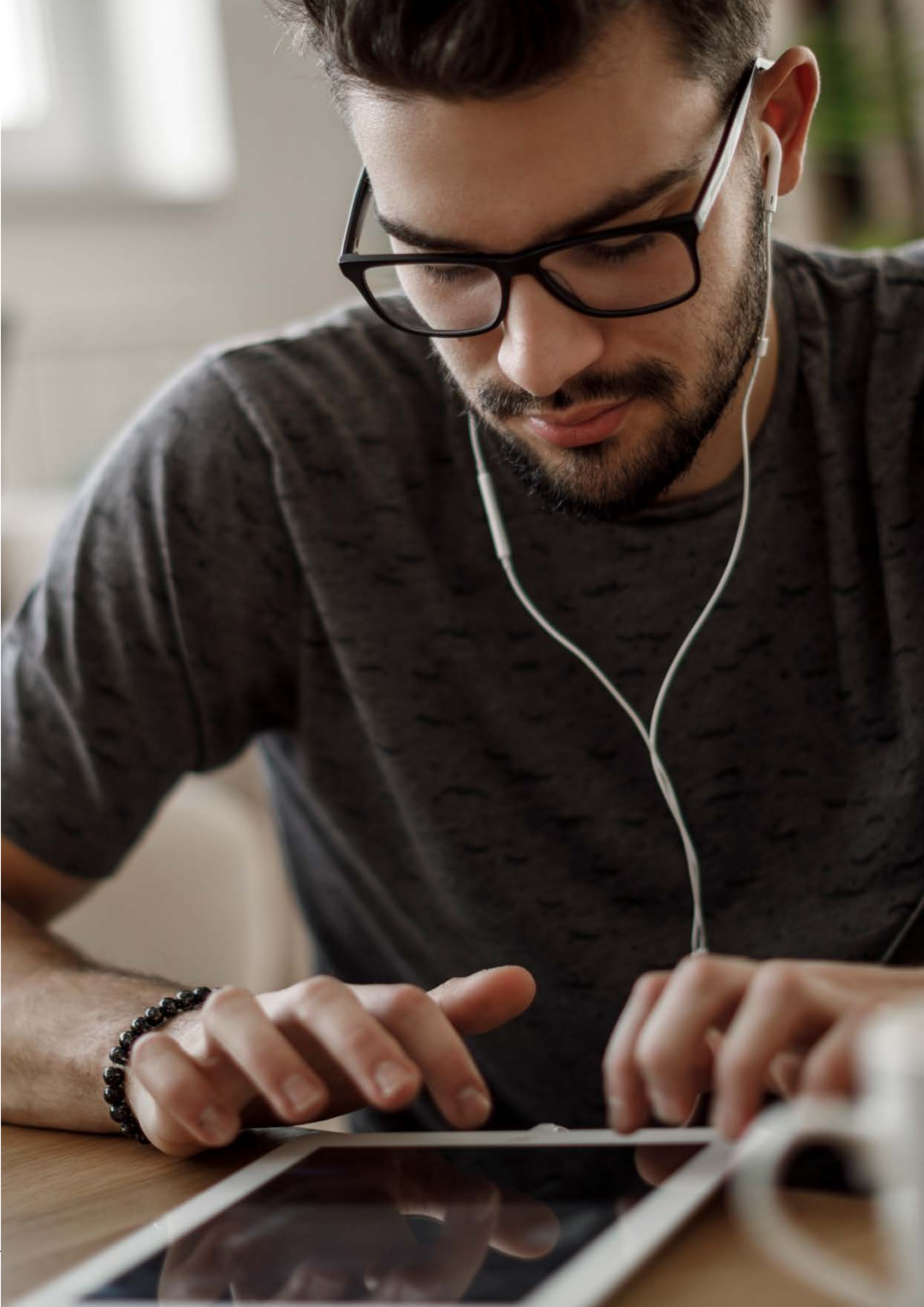
3

Physical spending declined – while overall online spend increased

With more consumers confined to their homes, physical spend declined and digital spend trended upwards in the United States. For retailers, investment in the online user experience, logistics and everything in between, has arguably never been more important.

Changing spending habits of American consumers





US media consumption habits

People's lives have been drastically affected by the pandemic and it makes sense that their media consumption has changed too. But where and by how much?

Here we dive into the media consumption behaviors and habits of Americans to see how they interacted with the media before and after the beginning of the COVID-19 pandemic. We look at four distinct areas:

Watch Listen Read Social

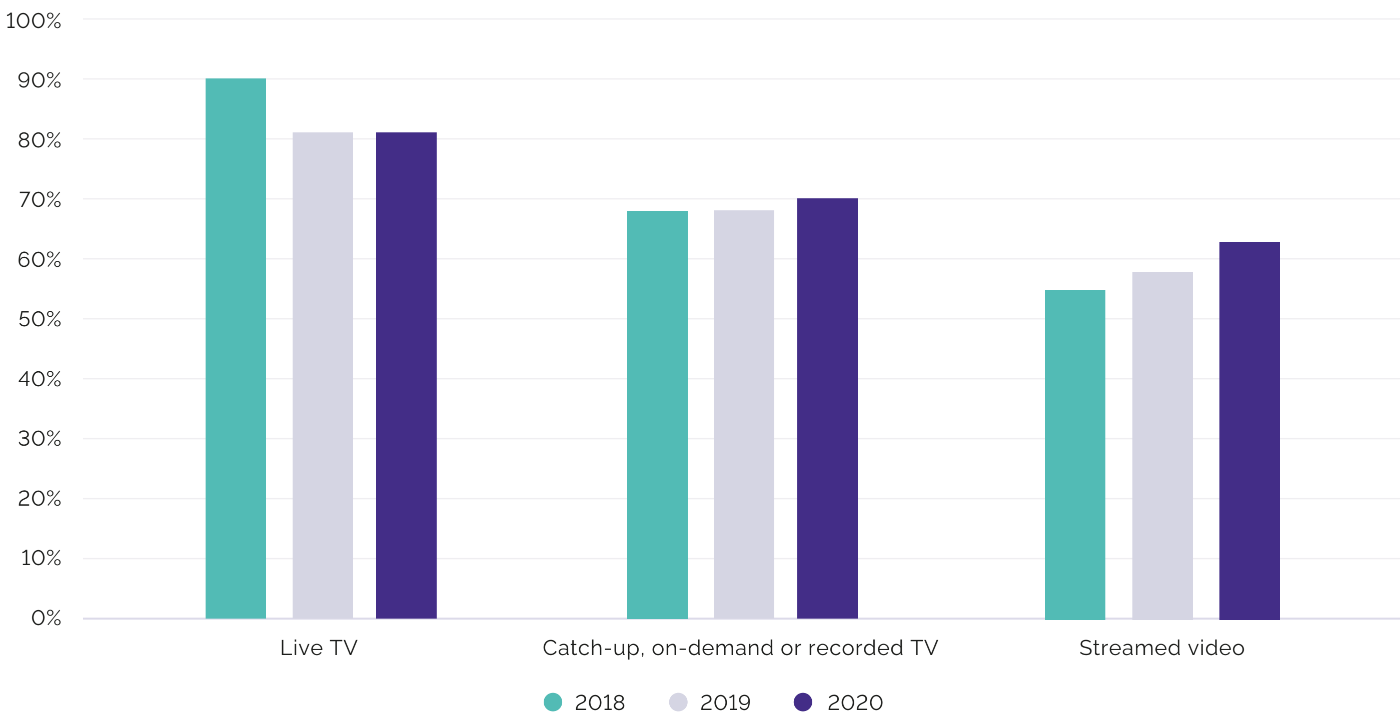
1

Watch

For many Americans, COVID-19 meant spending more time at home. That translated into more time watching content - such as live TV, on-demand and streamed video.

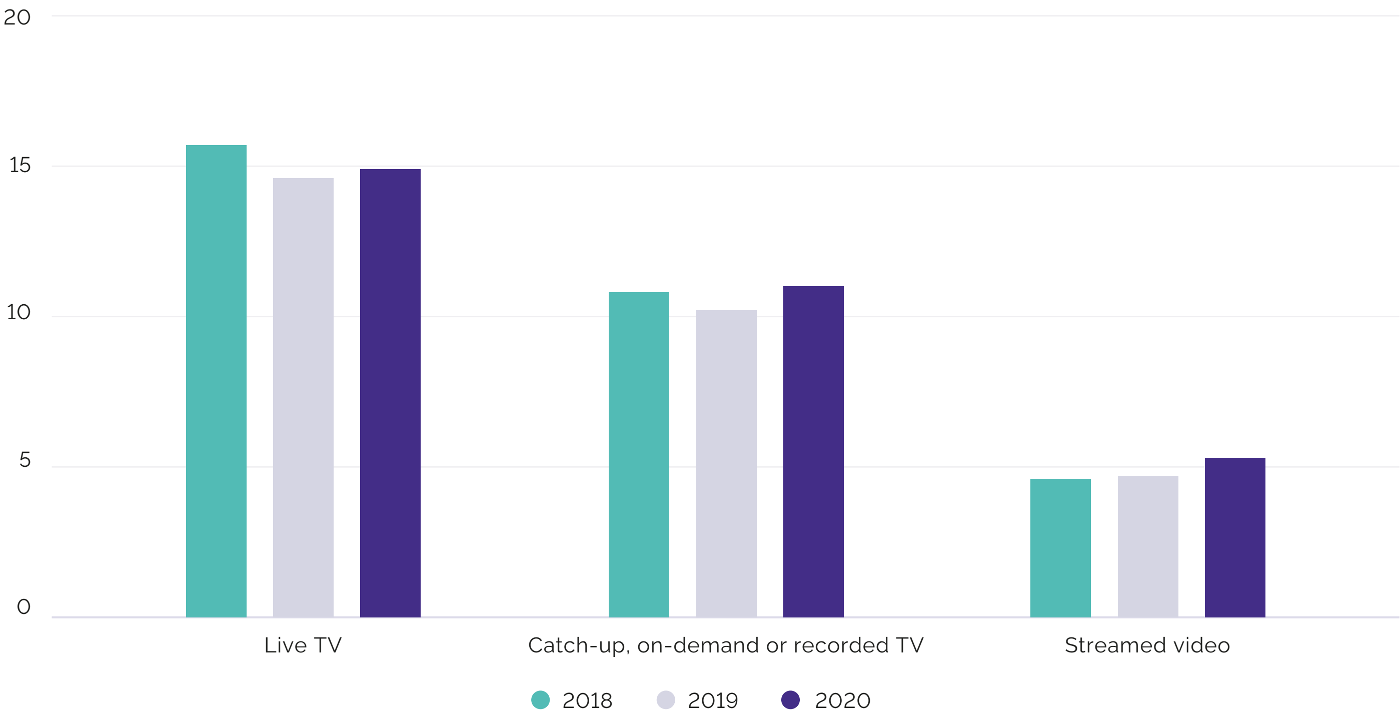
The audience for TV stabilized, with a previously noted decline in viewership (for both live and on-demand TV) coming to a halt in 2020. The audience for streaming continued to increase, with the year-on-year growth in streaming video accelerating slightly from +6% to +8% in 2020.

US: Live TV, catch-up & streaming viewers



Not only did TV (live and on-demand) retain viewers, but the number of hours watched also increased - by about a half hour per week for live TV and almost an hour for on-demand TV (although both fall short of returning to 2018 levels). There were similar gains for streaming too. More people used streaming TV and this audience watched half an hour more per week too.

US: Live TV, catch-up & streaming average hours per week (among viewers)



TV and streaming average weekly viewers and hours - by age

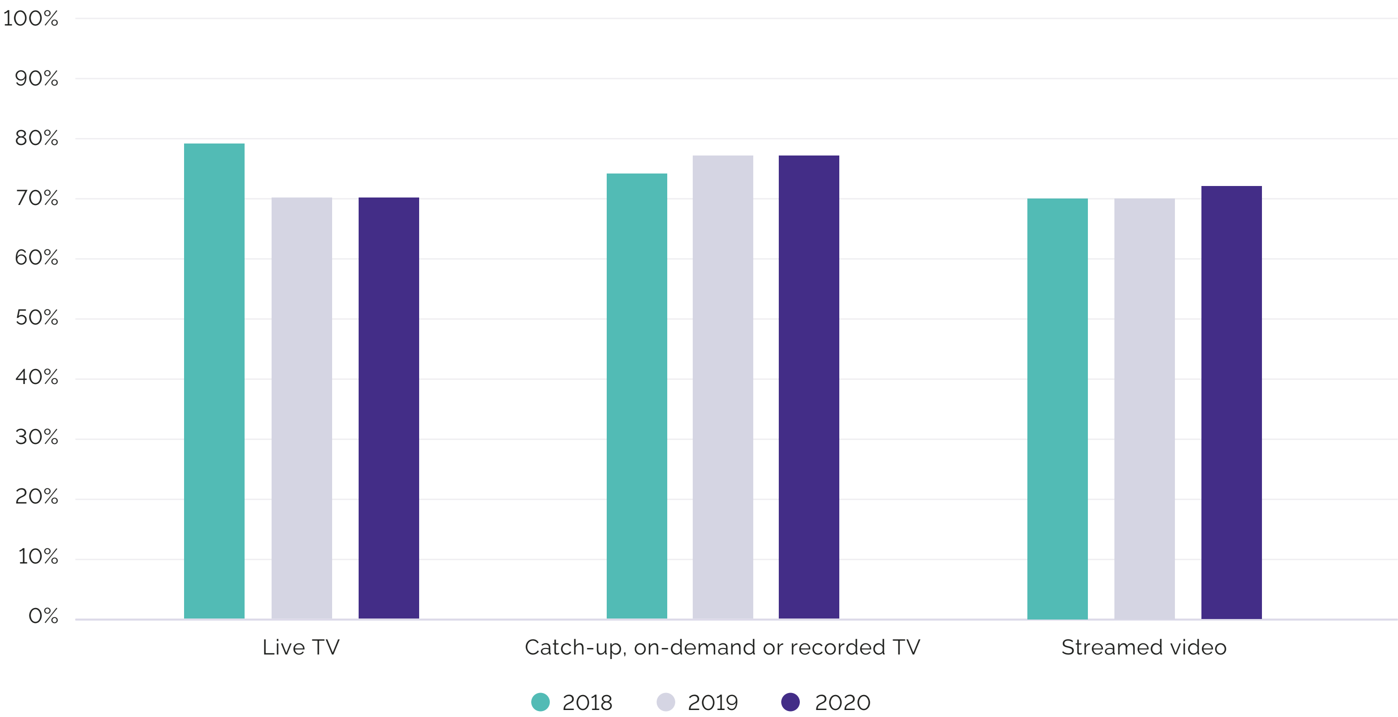
In 2020, the decline in TV penetration stopped and across all age groups there was an increase in both the audience for, and time spent on, streamed video. However, looking holistically at viewership by age, we see notably different viewing profiles.

In the US, younger adults aged 18-34 are now slightly more likely to watch on-demand TV or streamed video than live TV, although a majority can be reached through any of these vehicles.

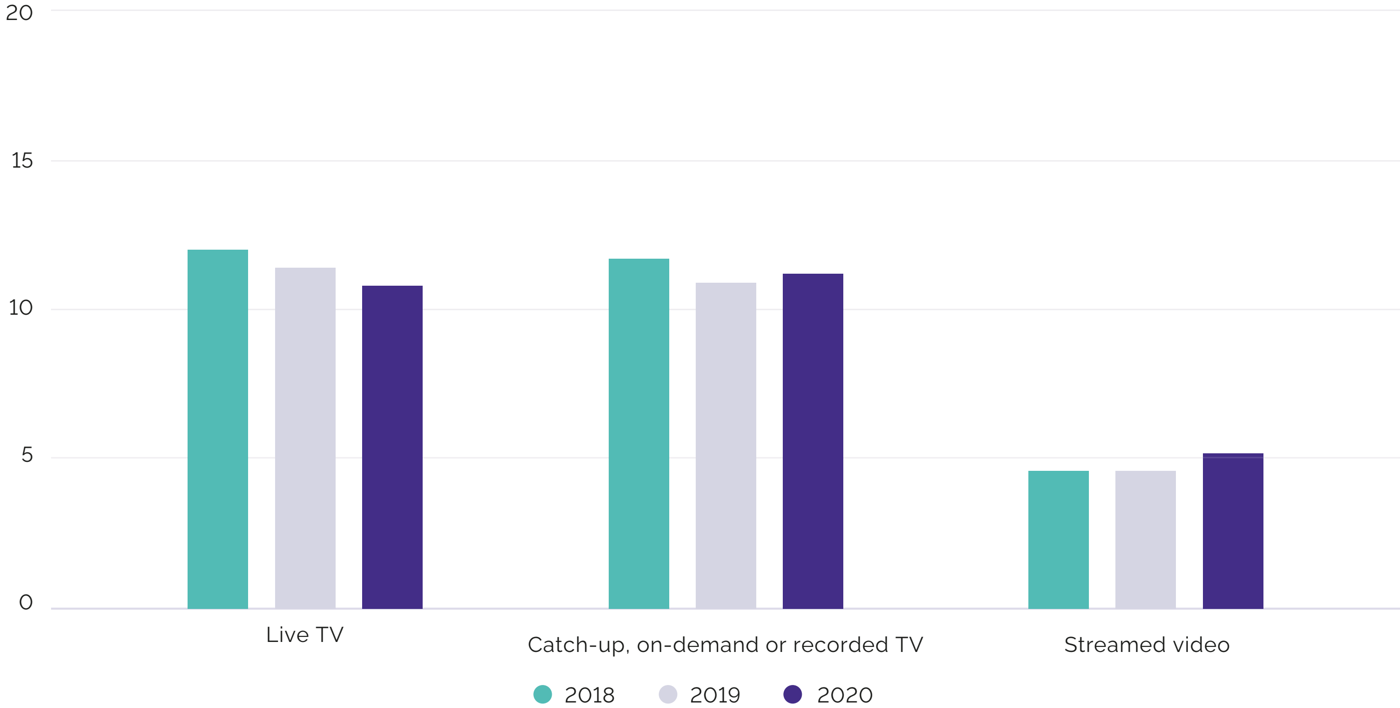
Among this age group, there is slow growth in audience size for streaming as a whole, which suggests the market may be approaching a saturation point. However, their time spent streaming increased in 2020, which could be a by-product of COVID-19 or it may be down to a greater choice of platforms available to consumers.

When it comes to both the audience size of and the time spent watching streamed video, adults aged 35-49 caught up with their younger counterparts in 2020. They're also similarly likely to watch on-demand TV, embracing the "watch what I want, when I want" mindset we see in younger generations (although in the case of these adults in their prime child-rearing and career years, it may be more of a "watch what I want, when I can" situation). However, they're still most likely to watch – and spend most hours viewing - live TV.

US Aged 18-34: Live TV, catch-up & streaming viewers



US Aged 18-34: Live TV, catch-up & streaming average hours per week (among viewers)



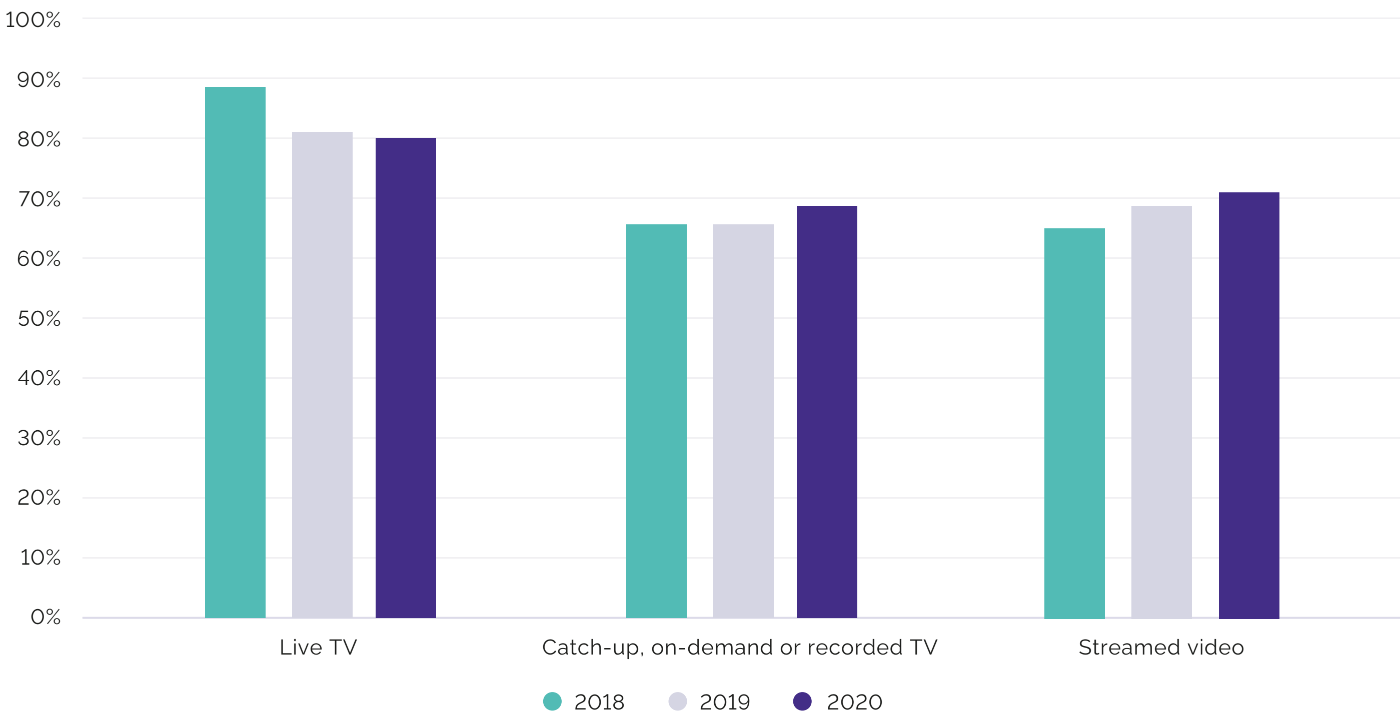
Among Americans aged 50-64, the slow declines in audience size and time spent viewing both live and on-demand TV were arrested during 2020. At the same time, among this age group streaming grew both in terms of audience size and time spent viewing.

Adults aged 65+ have not been turning away from live TV in recent years – in fact, their viewing time increased between 2018 to 2019 and continued to grow in 2020. On-demand TV watching is lower among this group and had been declining, but this trend reversed in the wake of the pandemic, with a near return to 2018 levels. And they're increasingly streaming as well, with both an eight-point jump in the proportion who streamed video in 2020 and a rise in the amount of time they spend watching content this way.

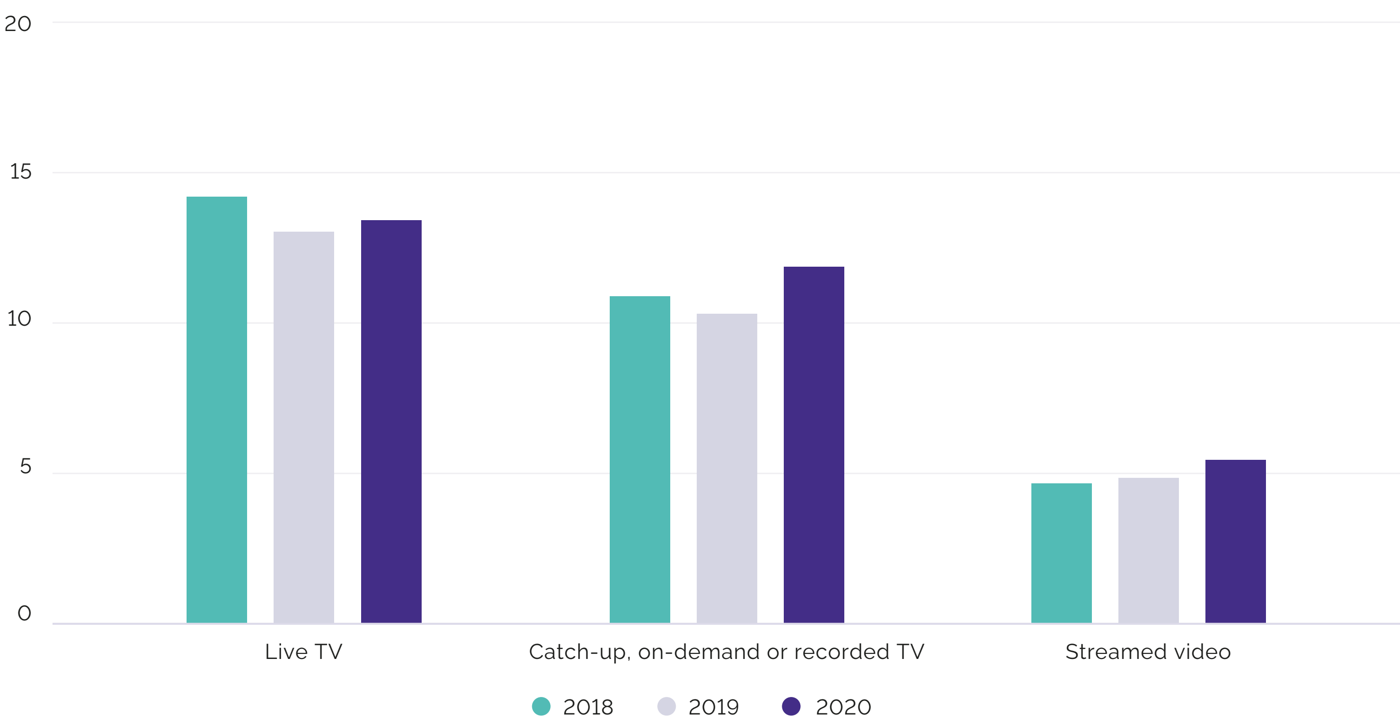
Time will tell if US viewers have fallen back in love with TV or whether the declines in viewing live and on-demand TV will resume once America fully re-opens.

> The question for marketers, given consumer habits, is perhaps no longer about the usefulness of TV and streaming. Instead, it is what the investment mix across the two should be and how can brands be present on ad-free streaming platforms via sponsorship and/or product placement?"
>
> **Tamara Alesi,** *Sector Head of Media*, North America

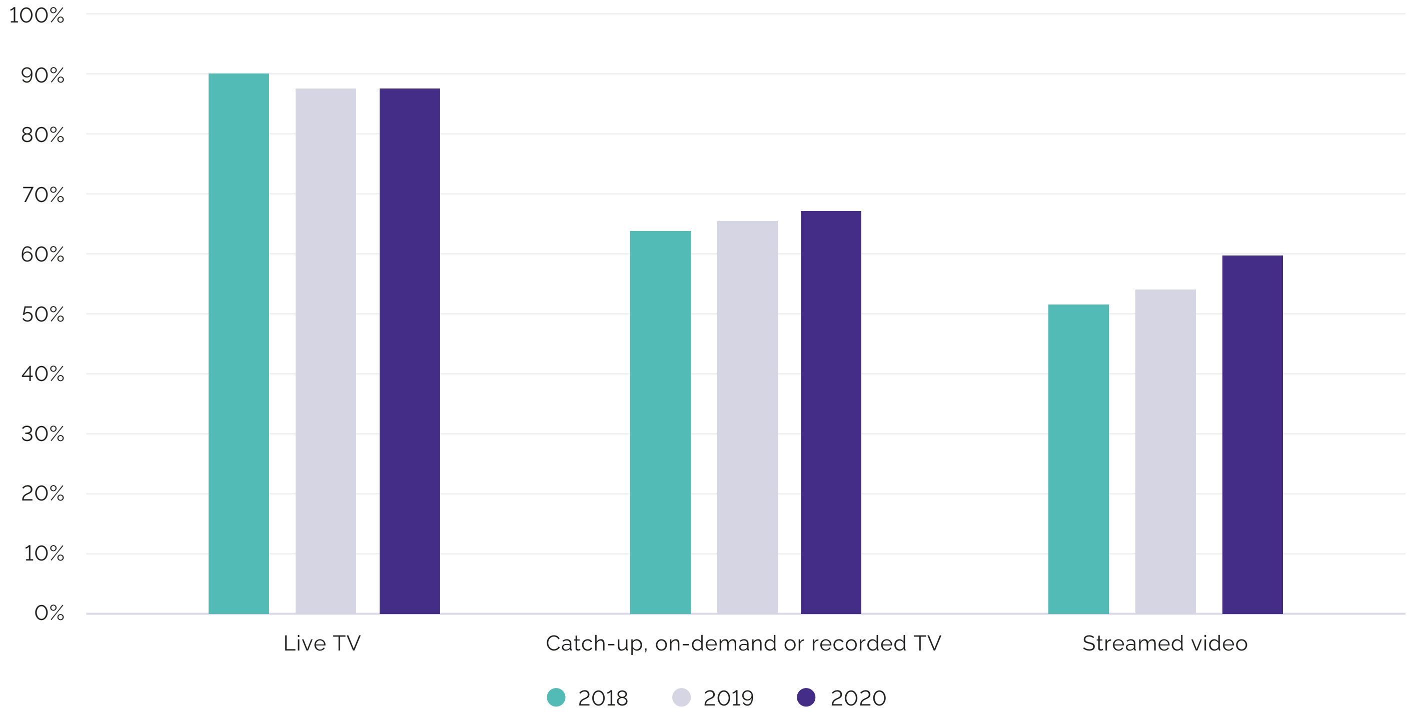
US Aged 35-49: Live TV, catch-up & streaming viewers



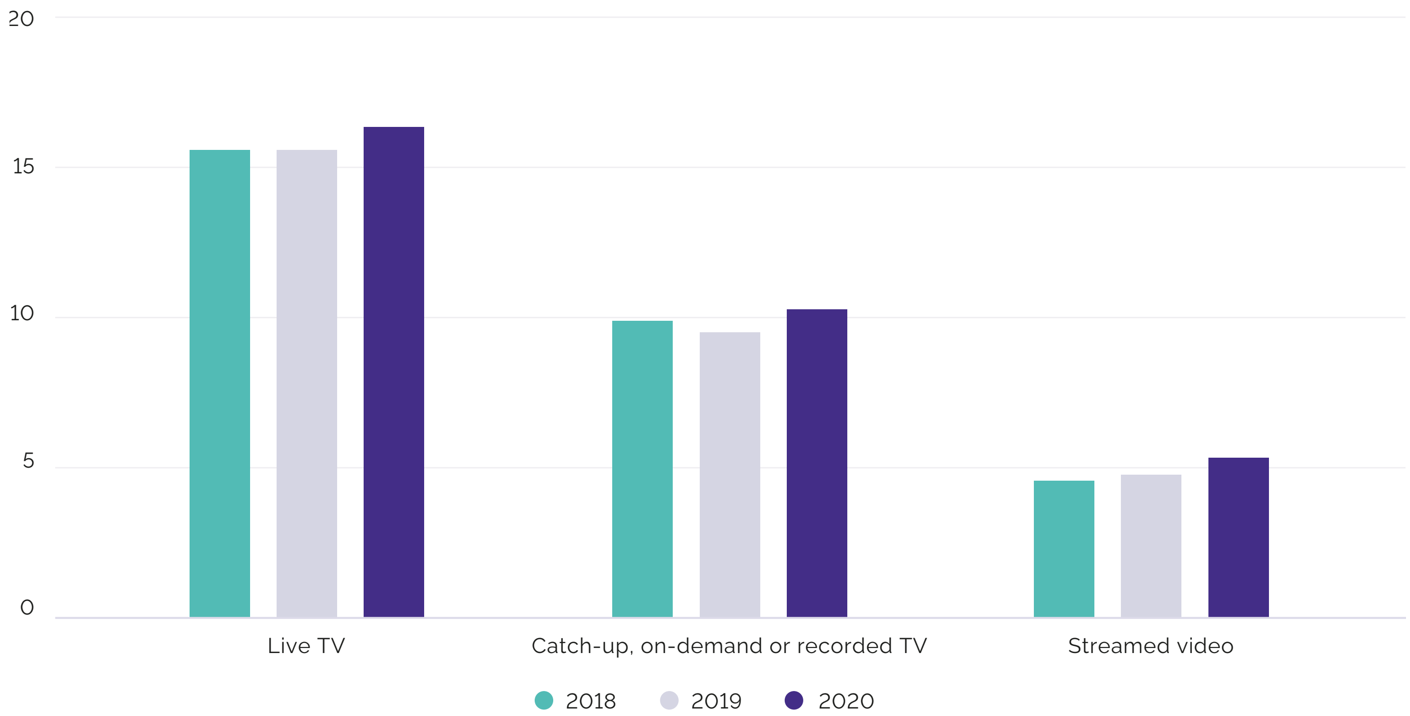
US Aged 35-49: Live TV, catch-up & streaming average hours per week (among viewers)



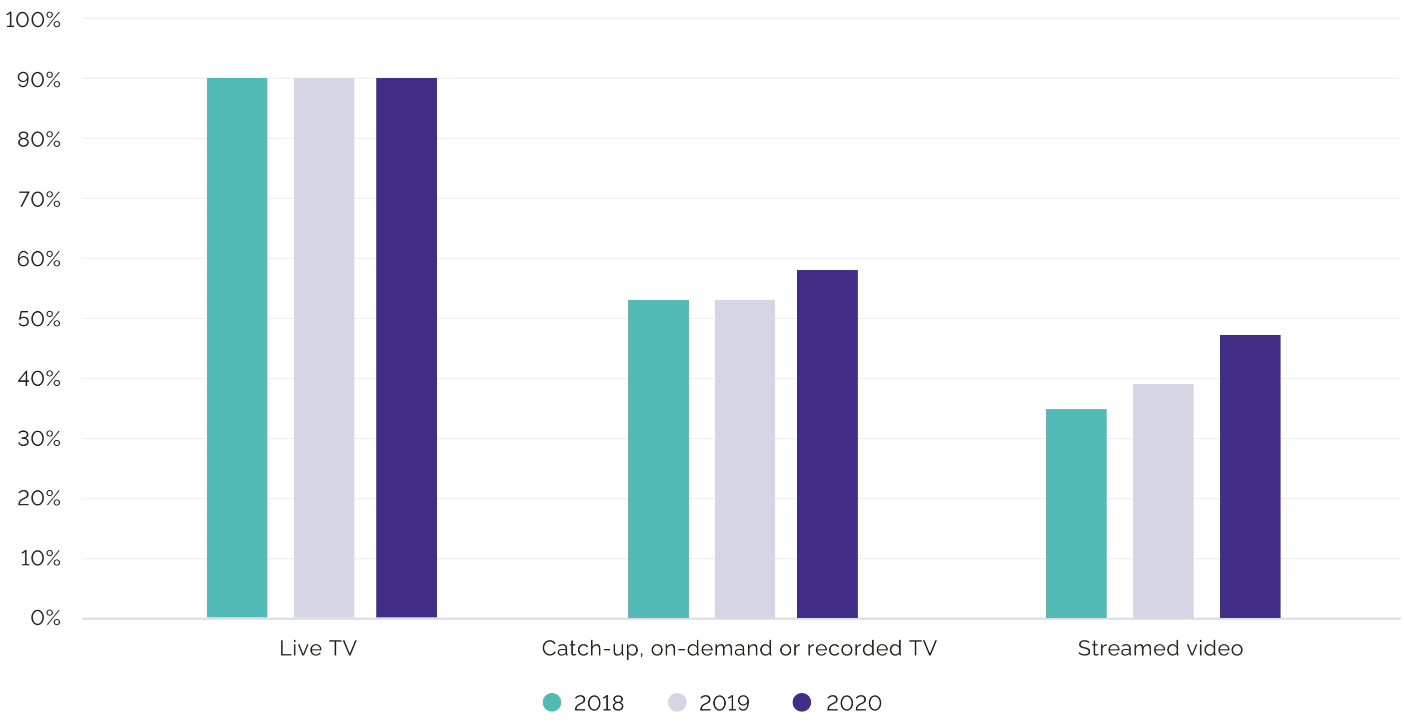
US Aged 50-64: Live TV, catch-up & streaming viewers



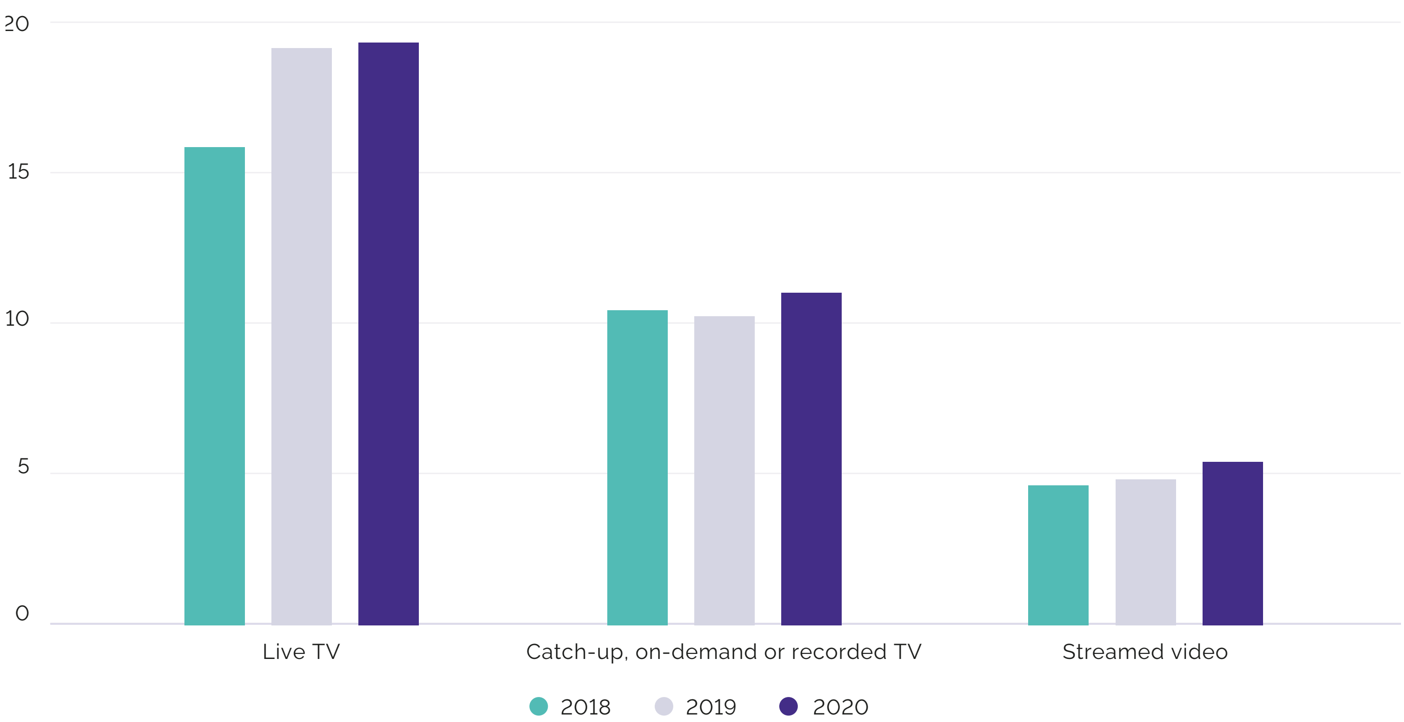
US Aged 50-64: Live TV, catch-up & streaming average hours per week (among viewers)



US Aged 65+: Live TV, catch-up & streaming viewers



US Aged 65+: Live TV, catch-up & streaming average hours per week (among viewers)



2

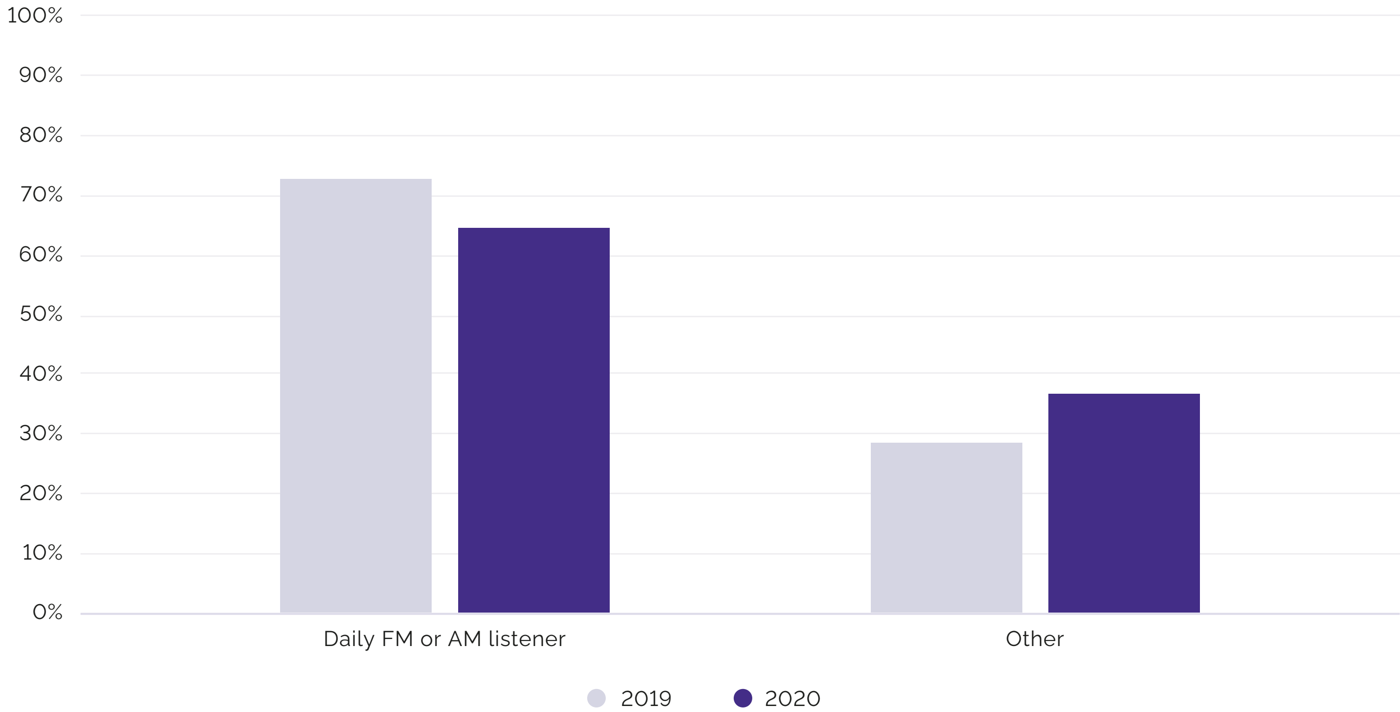
Listen

As with other media, when it comes to listening there was a shift from passive (AM/FM and satellite radio) to active (streaming and podcasting), a trend fast-tracked by consumers spending more time in the comfort of their home and less time in the car on the go. This may also in part be down to the increase in smart devices – which could be good news for up-and-coming podcast talent.

Comparing 2020 and 2019 data tells a story of decline for radio. The average proportion of daily AM/FM radio listeners dropped by eight percentage points, falling from 72% to 64%. Meanwhile, the proportion of people listening to satellite radio each day also fell - from 38% to 32%.

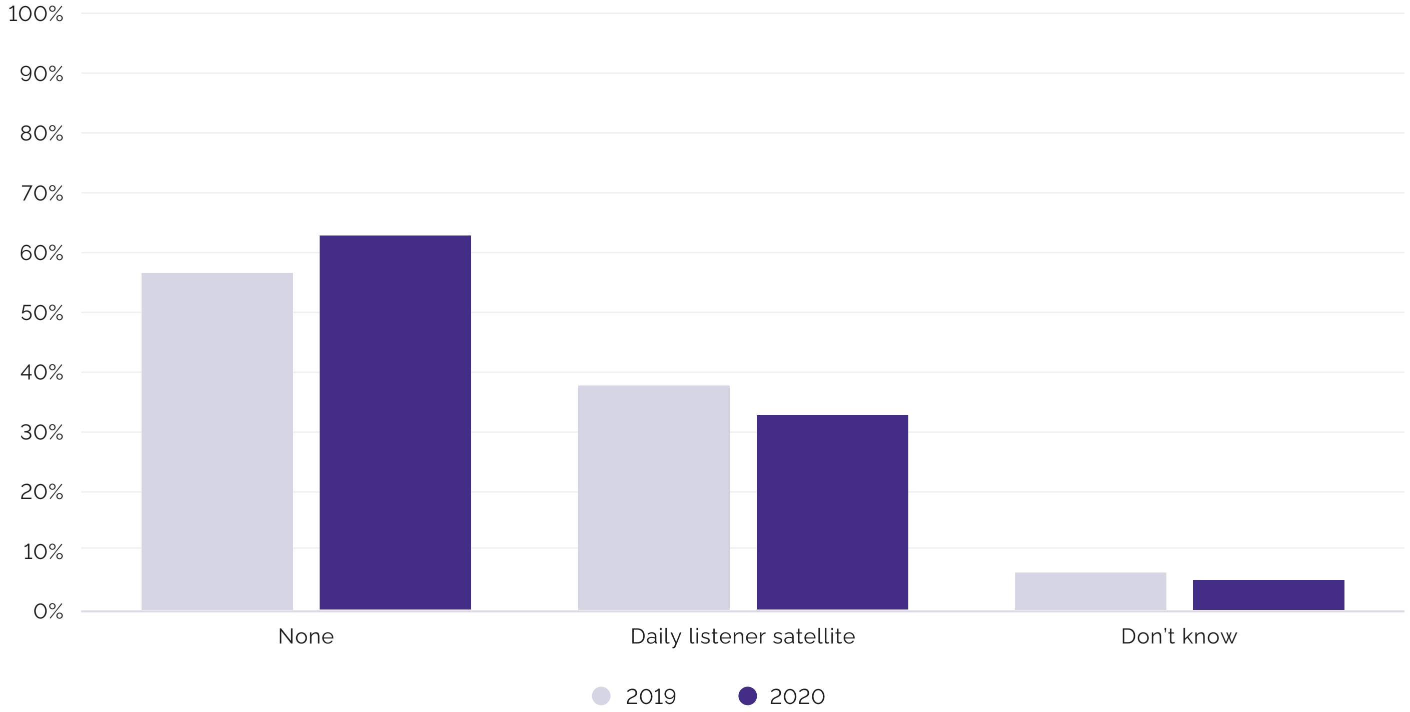
US: Average daily AM or FM radio listeners

On average, how much time do you spend each day listening to AM/FM Radio?



US: Average daily satellite radio listeners

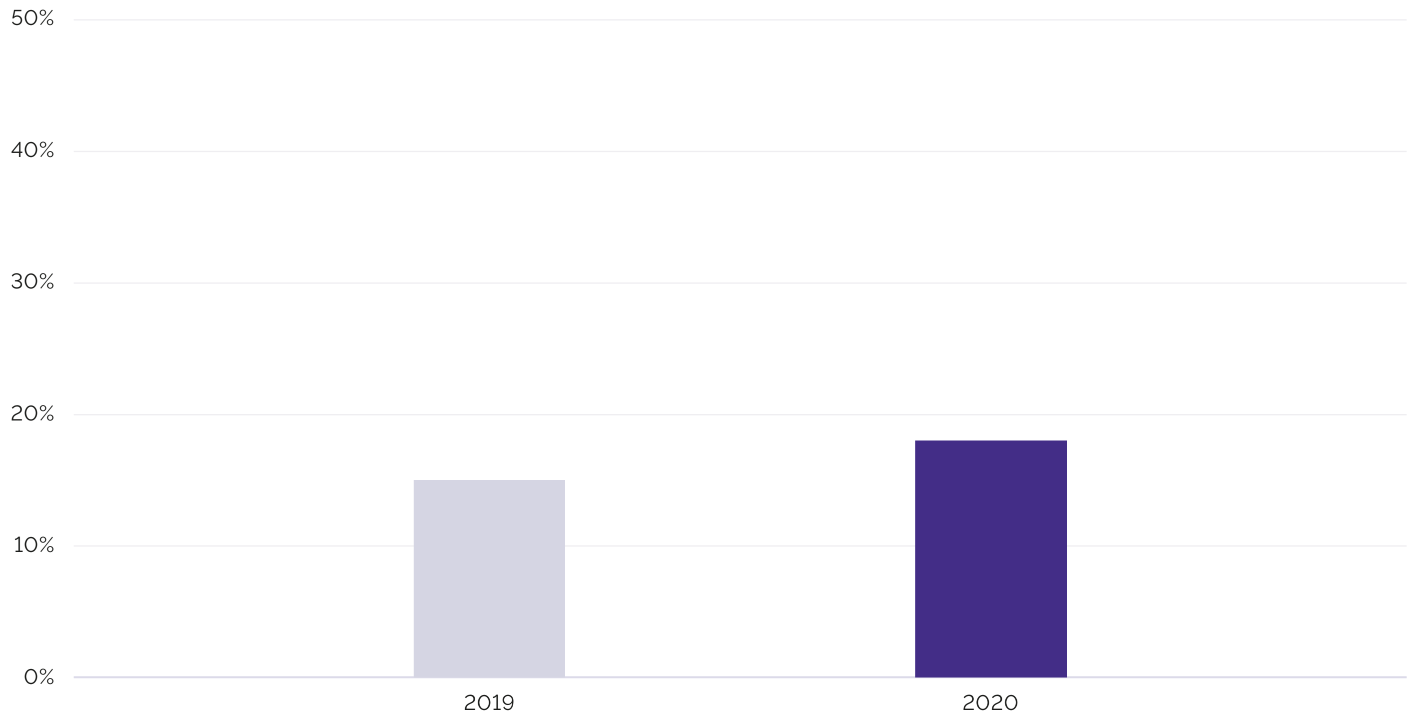
On average, how much time do you spend each day listening to Satellite Radio?



It is more of a mixed picture when it comes to streaming. For example, Spotify saw its usership figures increase by two percentage points year-on-year, but this is not the case for every brand in the US.

US Average Spotify users

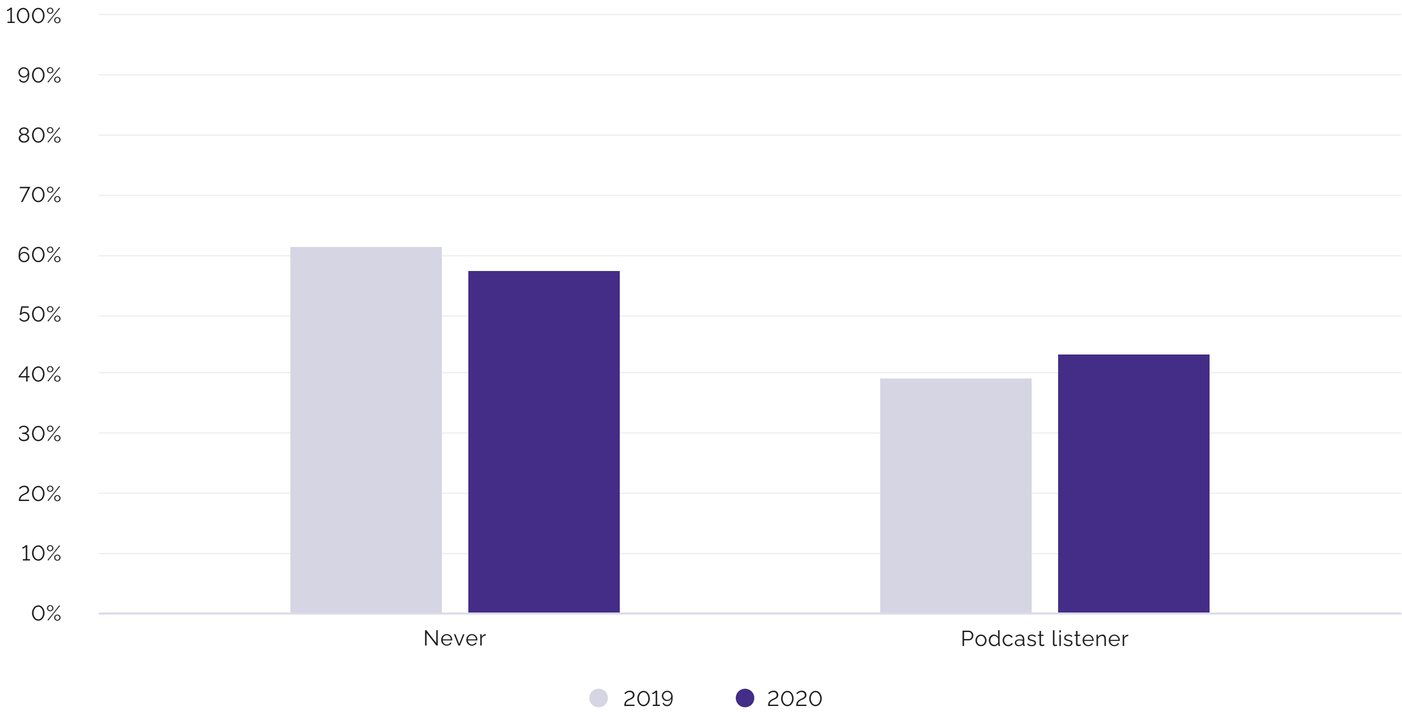
Have you visited any of the following online brands in the past 30 days (through desktop/laptop, tablet, or mobile phone)?



US yearly average podcast listenership rose from 39% in 2019 to 43% in 2020. With this notable growth in the market, podcasters have leaned into new strategies such as podcasts embracing audio and video and delivering exclusive content.

US: Average podcast listener penetration

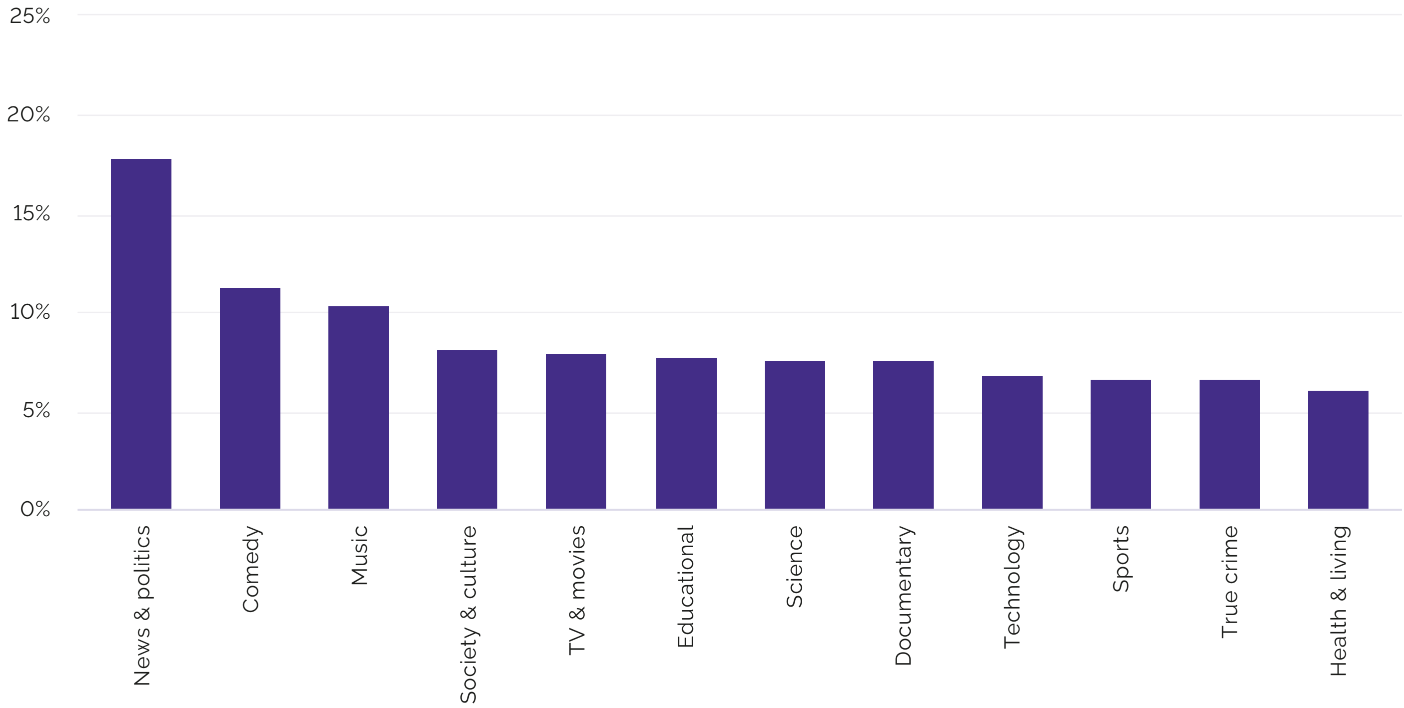
How often, if at all, do you do the following activities? - Listen to podcasts



> Listening is still relevant. However, marketers might begin to think less about shifting investment out of 'Listening' as a strategy and think more about placing brand support behind streaming audio and/or emerging podcasters, to engage attentive listeners."
>
> **Tamara Alesi,** *Sector Head of Media*, North America

US: Podcast genres regularly listened to

Which, if any, of the following genres of podcasts do you regularly listen to? Please select all that apply.



Our data shows that news and politics is currently the most listened-to genre of podcast among Americans, easily outperforming music in second place. These podcasts, as well as those on society and culture, and science may well be a strong option for those buyers who have traditionally used print to reach the audiences interested in these kinds of subjects.

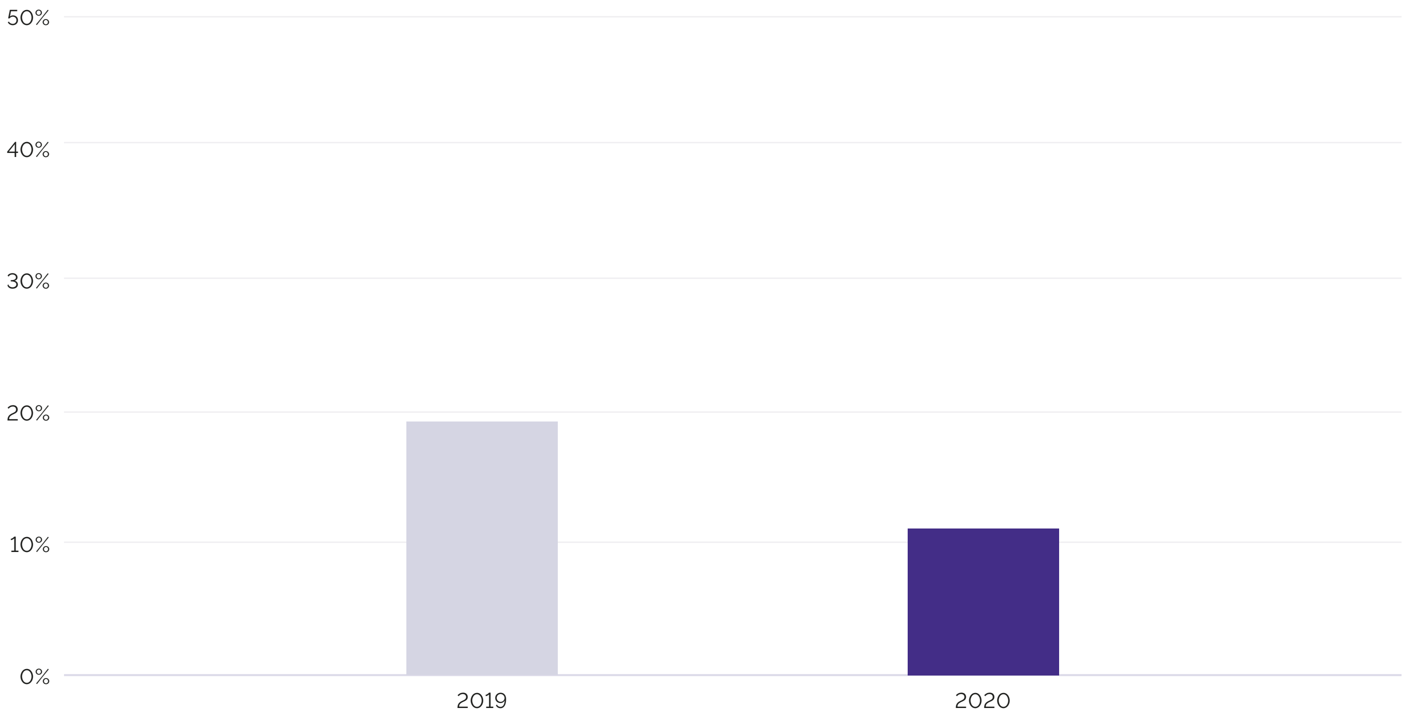
Any increase in audiences for free-to-air podcasts and non-subscription music streaming (and that accounts for more than 80% of users) has a great upside for streaming companies - every extra hour heard creates opportunities for advertisers to reach target consumers.

3

Read

US: Average print magazine readers

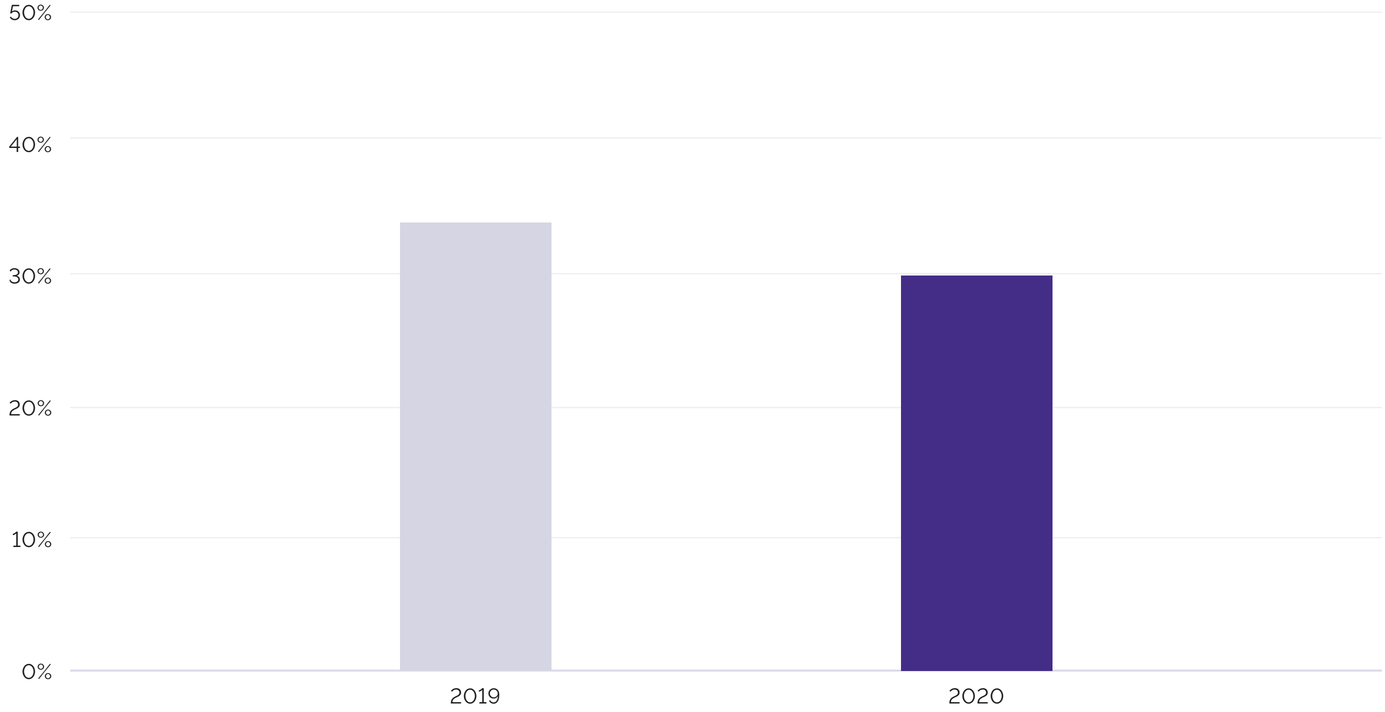
In a typical week, approximately, how many hours would you spend reading a magazine in print? By this we mean, a physical print copy of a magazine rather than reading online or through any other medium.[1]



[1] This question is used to calculate the overall percentage of the population who consume this medium

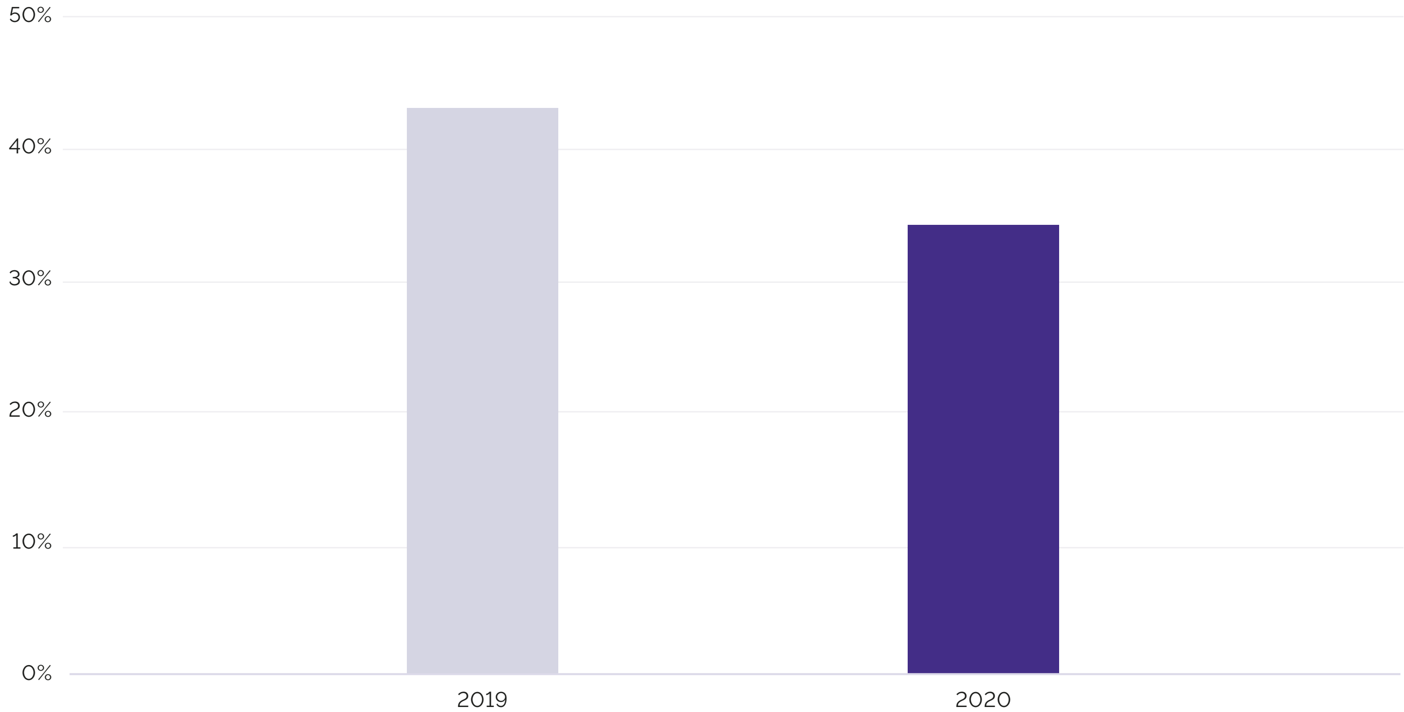
US: average print newspaper readers

Approximately, how much time in total, if at all, did you spend reading or looking into daily newspaper printed on paper last week in the last week? Please do not include reading or looking into a newspaper's free website. [2]



US: Average digital magazine readers

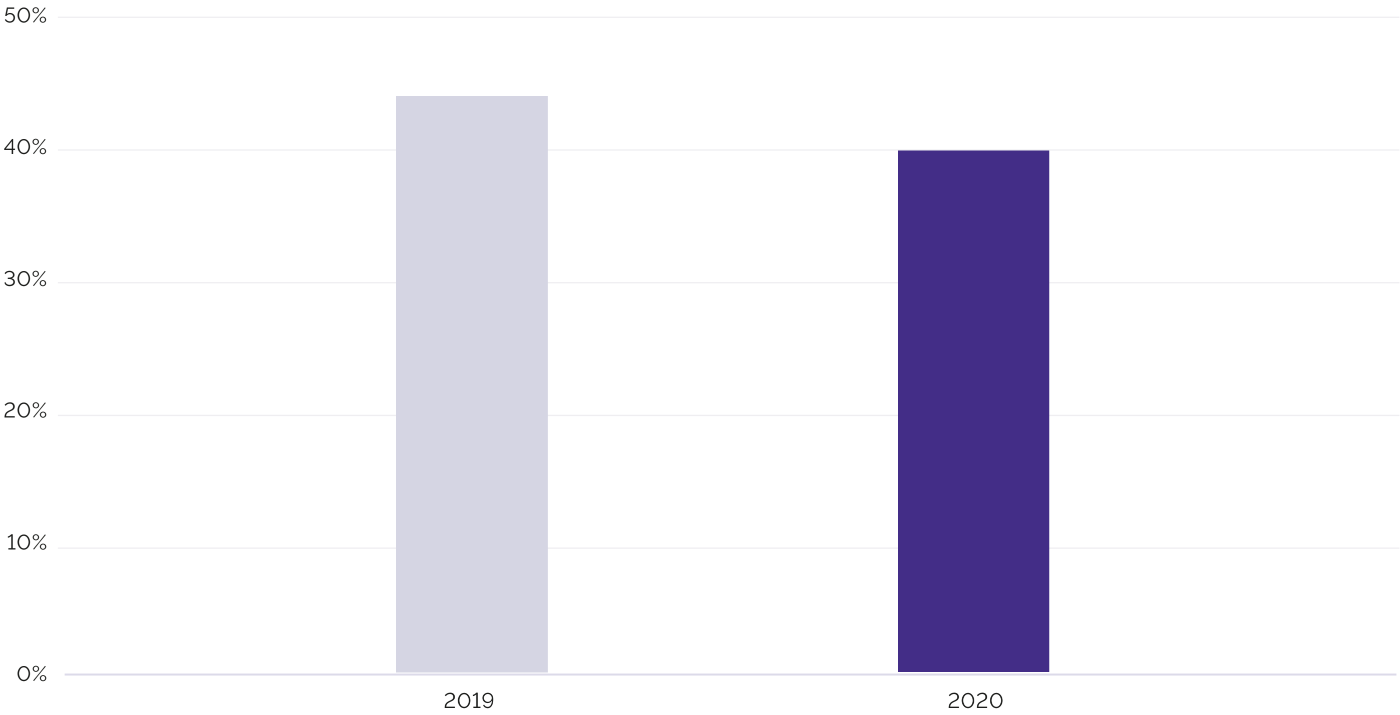
Approximately, how much time in total, if at all, did you spend reading or looking into magazines in electronic form in the last week? Please do not include reading or looking into a newspaper's free website. [2]



[2] This question is used to calculate the overall percentage of the population who consume this medium

US: Average digital newspaper readers

Approximately, how much time in total, if at all, did you spend reading or looking into daily newspaper in electronic form in the last week? Please do not include reading or looking into a newspaper's free website.[3]



Our data shows that print saw a notable decline between 2019 and 2020. Magazine readership fell from 19% annually to just 11% in 2020, while print newspaper readership also dropped from 34% to 30%.

Digital magazine readership also fared badly, declining from an average of 44% in 2019 to 34% in 2020 as people turned away from the medium.

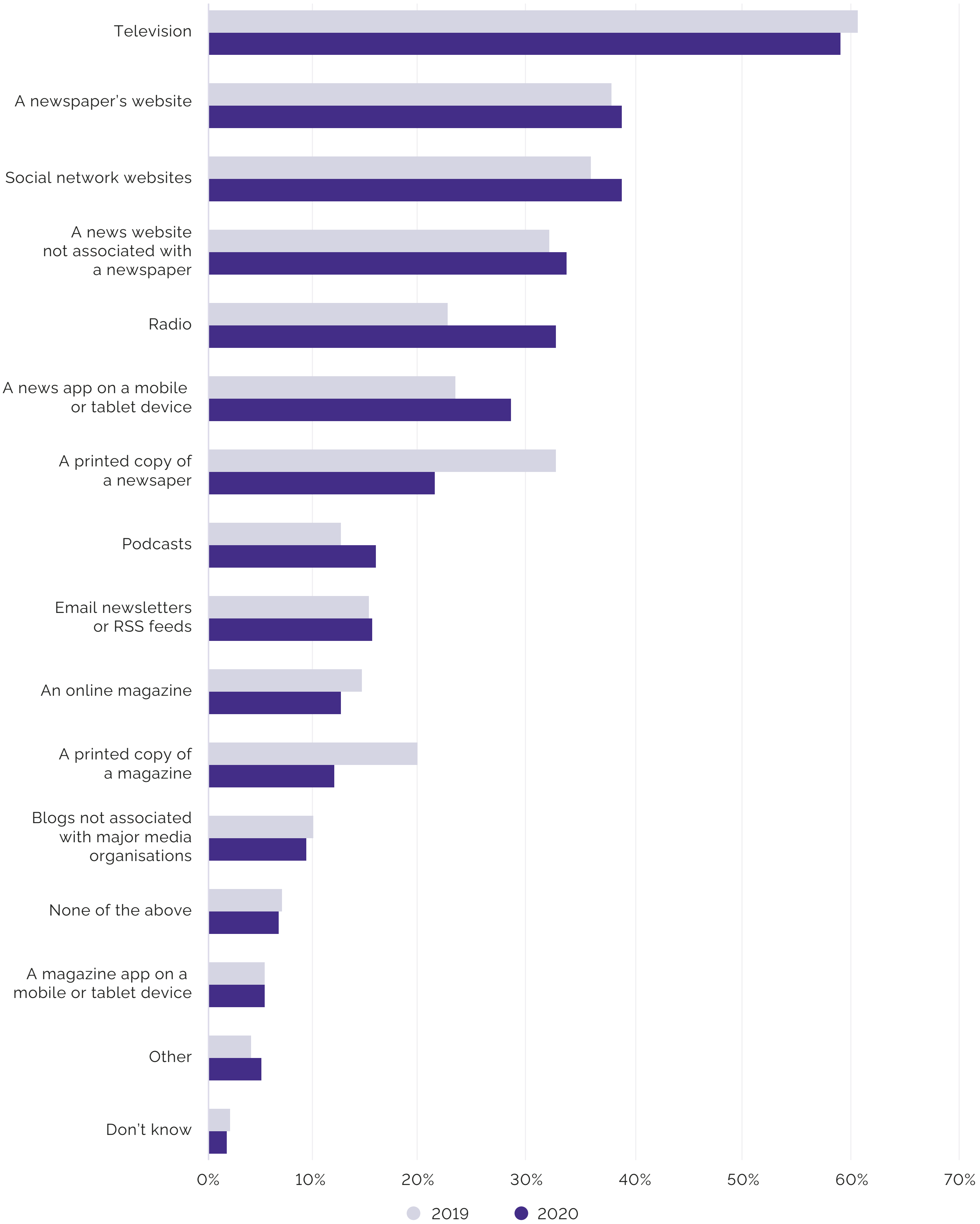
The average weekly readership of digital newspapers (a measure which excludes free news sites) fell from 44% in 2019 to 40% in 2020 – a fact that many may find surprising in light of the pandemic.

Between the pandemic and the election, Americans had lots of current affairs flying around. Their main source of news was television and we see drops in print newspaper and radio in line with more general consumption. Notably, in 2020 newspaper websites (this time including free browsing) and social network sites are the joint second most likely source of news.

[3] This question is used to calculate the overall percentage of the population who consume this medium

US: Sources used to access news

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

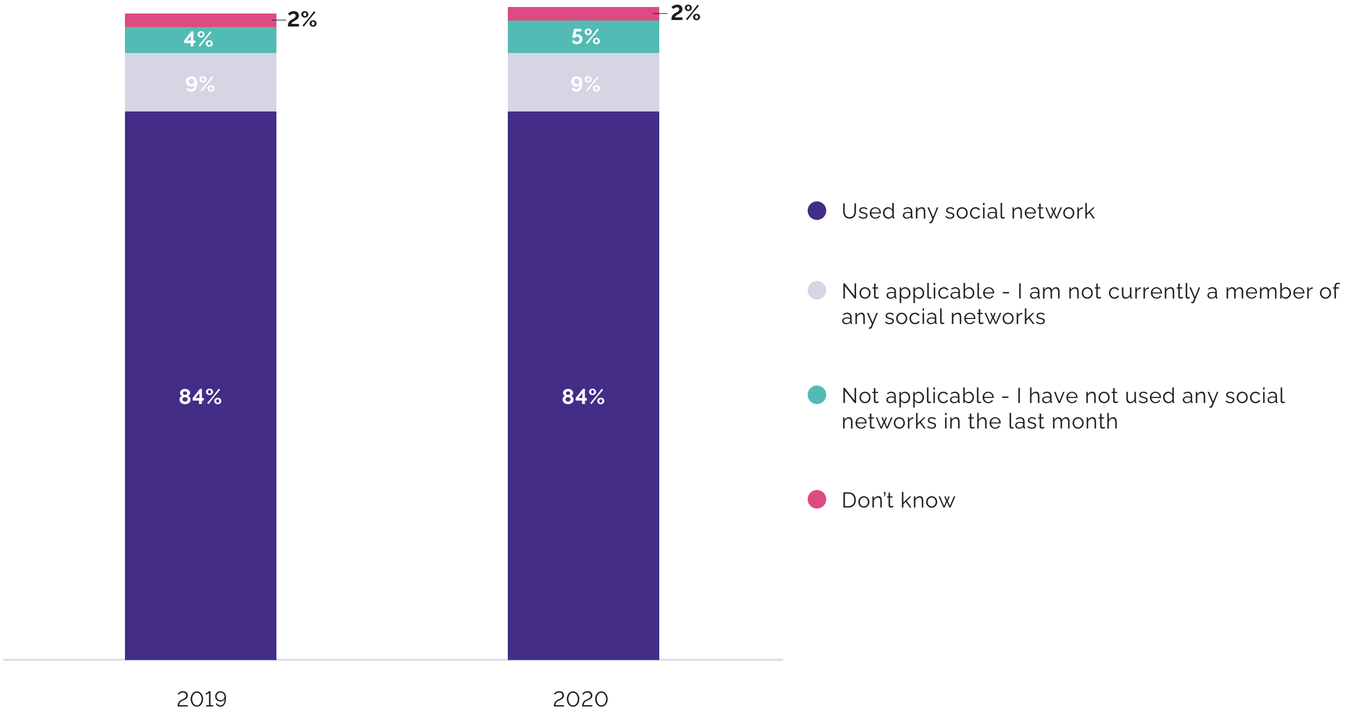


As this trend has been in motion for a while, it's maybe not surprising to see further falls, with consumers likely to be doing more watching and listening. There could also be an opportunity for print publishers to reinvent the medium; leaning into video and audio to share content and capture a greater share of advertising dollars in valuable content.

4 Social

US: Average users of any social network

Which, if any, of the following social networks have you used within the last month? Please think about any occasion on which you either visited the website directly, used a mobile application to access the network, or shared something through the network via another service. Please select all that apply.

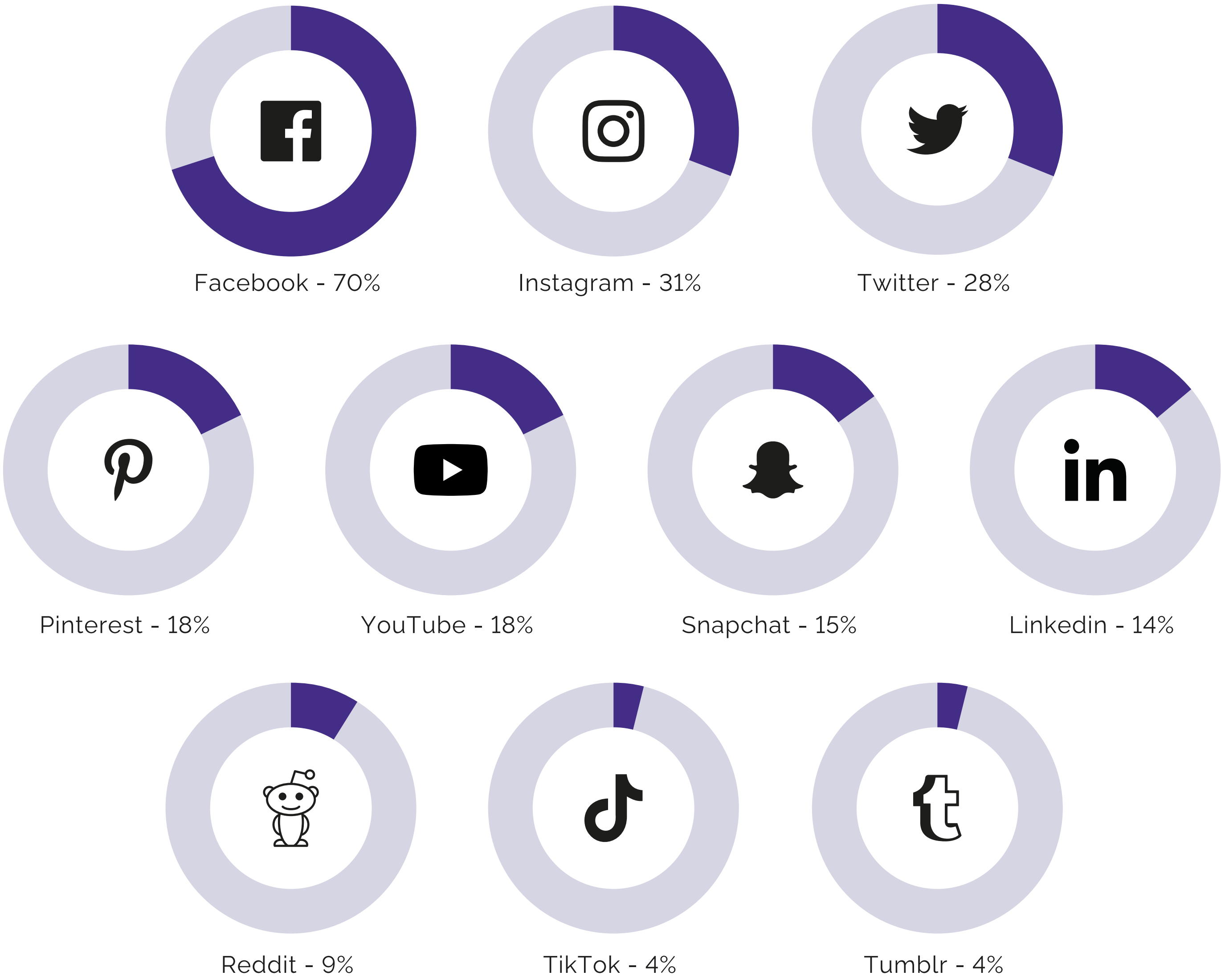


Social network usage also remained static in 2020, with an average of 84% saying they used a social media platform at some point in the month prior to being asked. But while the market looks saturated from this perspective, the amount Americans are using social appears to have changed notably over the past year – for example, 30% tell us that they are using Facebook more often, with the numbers being 18% for Instagram and 16% for Twitter.

Fewer people are reading print and it's reasonable to think they may now be using social platforms to meet the needs that they previously met through paper - everything from news (as we evidence above), through trends to lifestyle information.

US: 2020 Average social media usage

Which, if any, of the following social networks have you used within the last month? Please think about any occasion on which you either visited the website directly, used a mobile application to access the network, or shared something through the network via another service.



Facebook is the dominant social platform for American consumers (based on usage in the last month, from December 2020). Its stablemate brand, Instagram, comes in second putting the group in a powerful position with US consumers.

Their competitors follow some way behind, with less than half the market share of Facebook. TikTok won a lot of headlines in 2020 and while it still has some way to go to catch up with competitors, a top ten position is a performance worth noting.

Key takeaways for the US market

The most notable movements in the US between 2019 and 2020 include:

Static live TV viewership but growth in streamed video – from 58% to 63%

A decline in AM/FM radio listenership from 72% to 64%

An increase in podcast listenership – from 39% to 43%

Significant declines in both print news and magazine readership

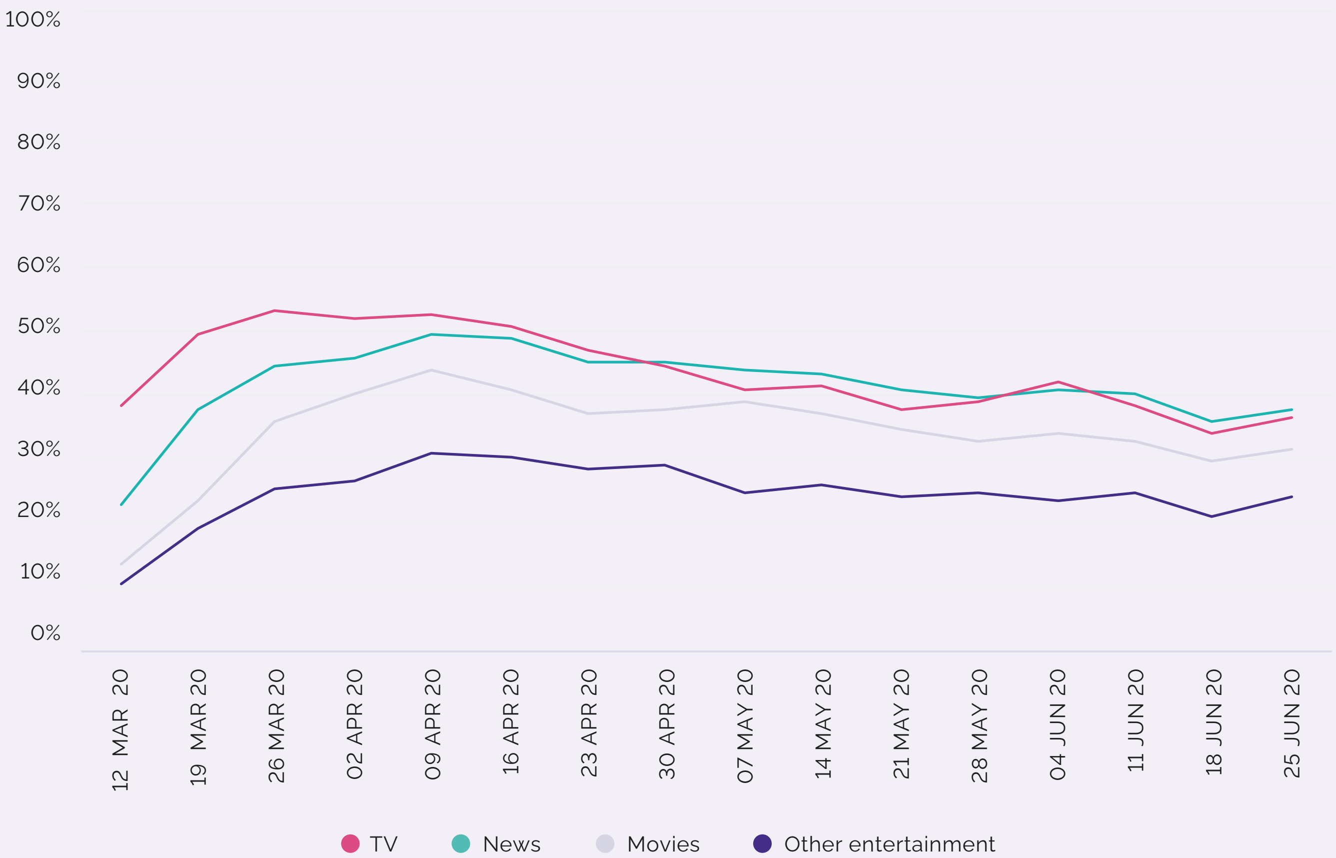
How our media experience changed – some examples

In the US, consumption of certain types of content rose sharply as measures were introduced to contain the virus. Here are a handful of examples.

1. News, movies and entertainment content became more popular

News saw a particularly dramatic increase as Americans awaited the latest updates from President Trump and Dr. Anthony Fauci. Beyond staying informed, consumers also started to watch more movies and entertainment programming. Even allowing for any seasonal patterns, these changes appear significant.

Americans consumed more of this content

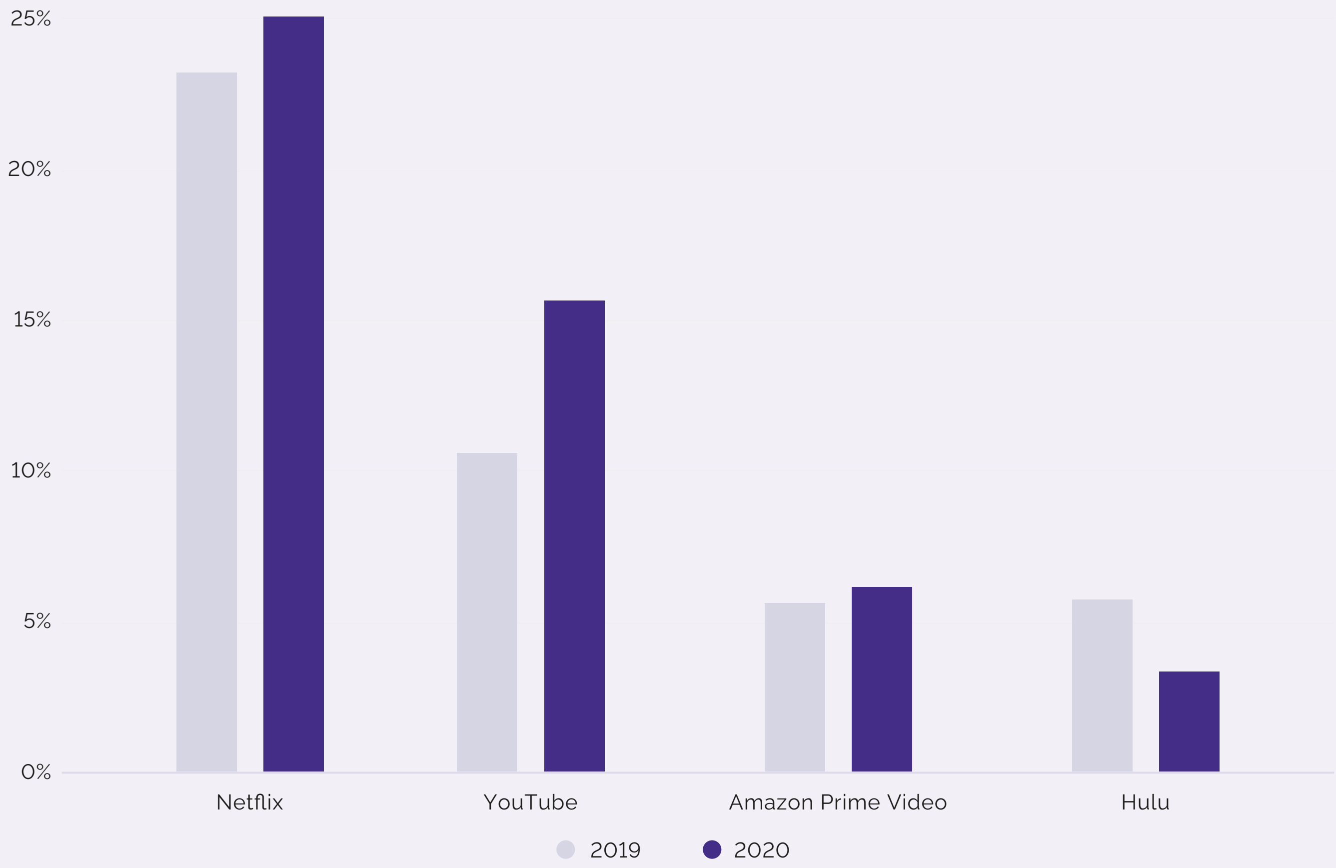


But as the pandemic progressed, weather improved, and retailers, restaurants and cinemas reopened, consumption of these forms of content slowed down over the summer.

2. Video on-demand sector saw winners and losers

US: Most used streaming services

Which, if any, of the following catch-up or on-demand services do you use the most (on any device)?



In the US, Netflix and YouTube saw the biggest gains in terms of being the most favored on-demand services. Netflix continued to be the most popular but it was YouTube which grew its share the most compared with 2019, rising from 11% to 16% year-on-year. But there was decline in the market too - Hulu fell from 6% to 3% as a most-favored option in the US.

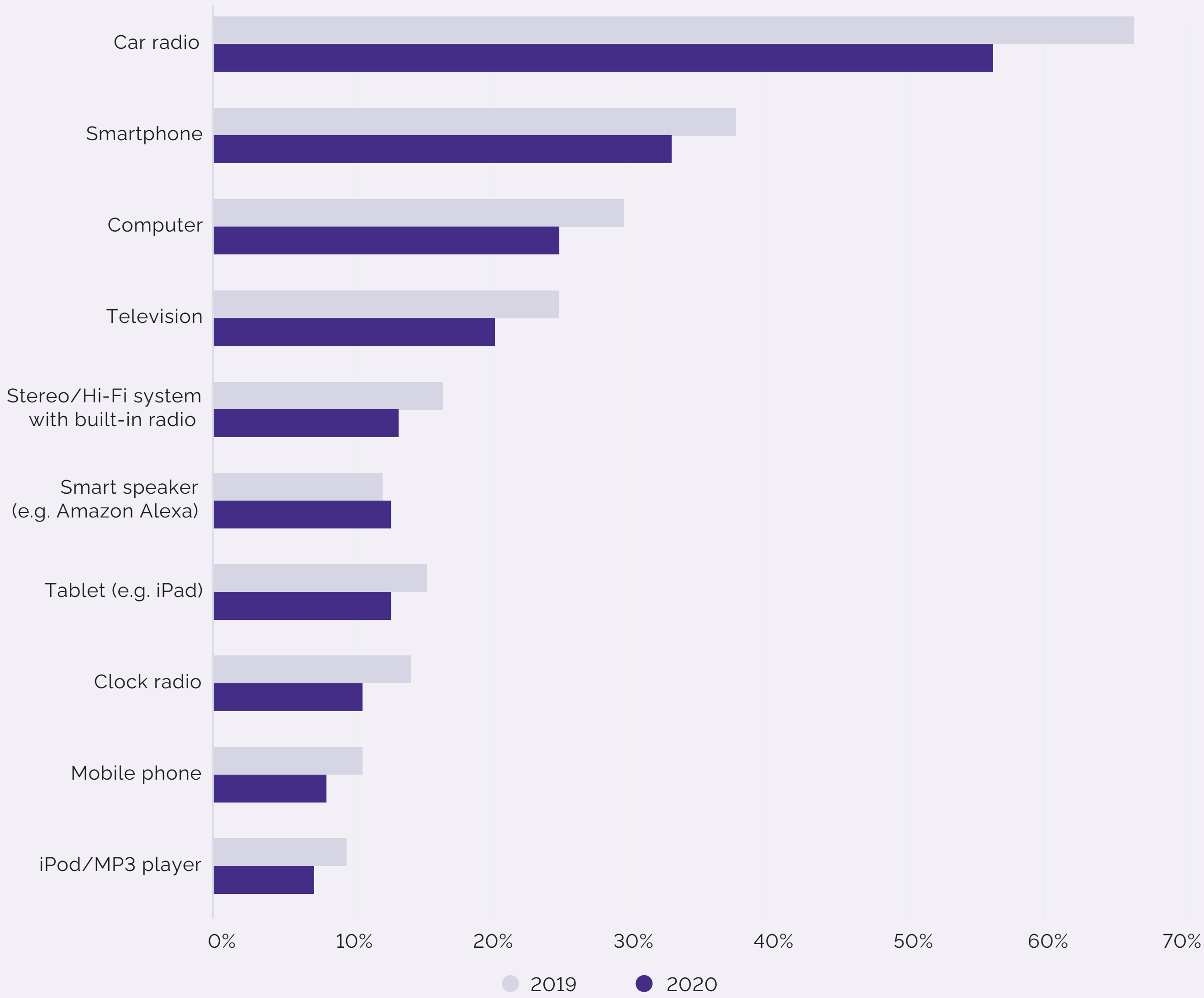
3. How we listen to the radio is changing

As we describe above, radio listenership declined in the US. The way that people listen also changed.

With guidance recommending that consumers avoid non-essential journeys and with various states and cities instituting "Stay at Home" orders at different points of the year, the proportion of the public listening to their car radios declined year-on-year.

US: Devices used to listen to the radio

Which, if any, of the following devices do you use to listen to the radio? Please select all that apply.



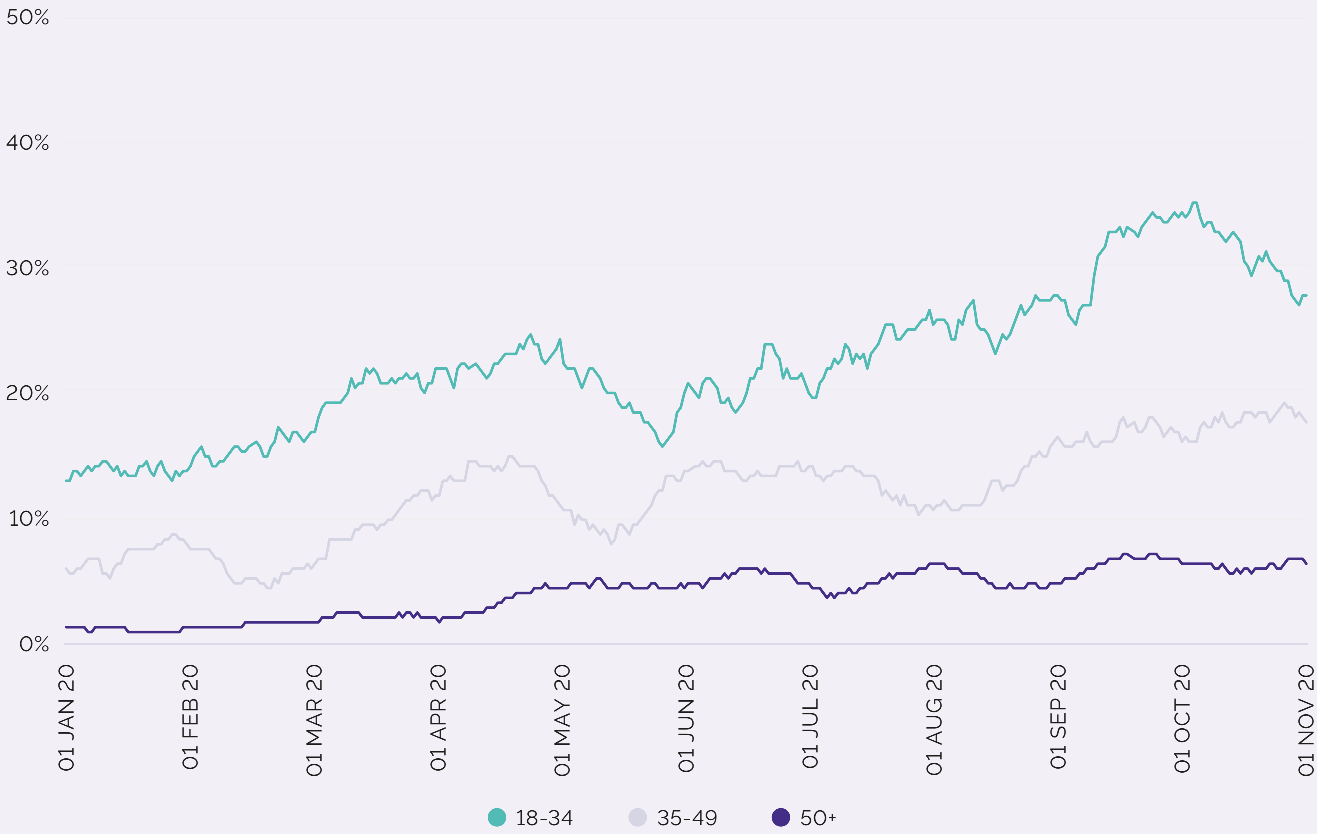
Fewer Americans also tuned in on their smartphones, and consumers were less likely to listen to the radio on their computers, TVs, stereos, tablets, and clock radios. Standalone radio also saw a slight decline. Only smart speakers saw an increase.

4. TikTok – How changing consumer behaviors shaped a new media giant

Some people had more time to be creative in 2020, and it may have accelerated the growth of a new media giant (see the section on social media above).

YouGov BrandIndex data reveals that TikTok had a very good 2020 among consumers. Usage trended upwards among all adult age groups, with the younger cohort (18-34) accounting for most of this increased adoption.

US: TikTok rises to prominence



As people under 18 make up a significant proportion of TikTok's user base, this data likely does not reflect the entire scope of the brand's American uptake.

Great Britain- Behavioral change and media consumption habits

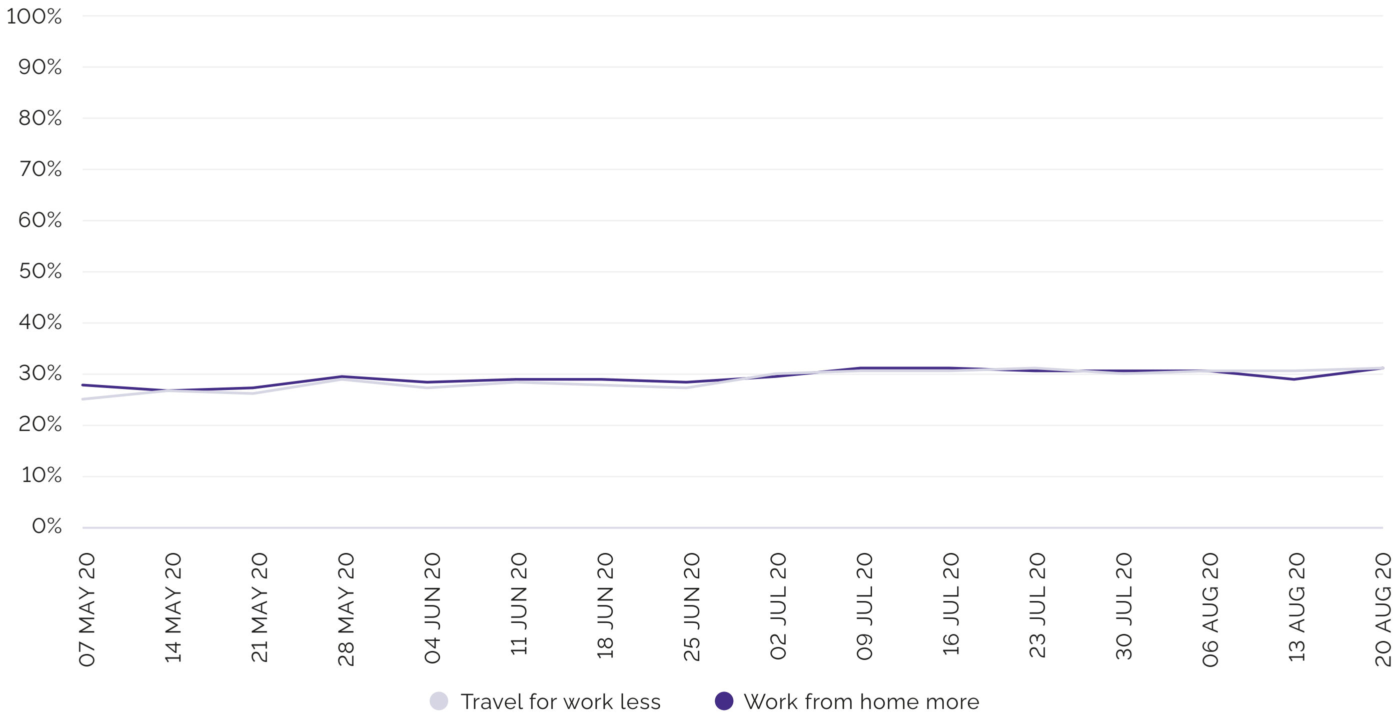
Britain demonstrated many of the same changes seen across the Atlantic in America. Here we quantify some of those changes, and then go on to investigate what effects they may be having on media consumption.

1

More Brits believe they're likely to work from home – and unlikely to commute – in the future

Like Americans, many Britons have made a successful transition to homeworking during the pandemic. In August, 25% of the whole British population was working from home, compared to 32% who were going in to work as normal.

Rising to a third of British workers believe they 'will travel much less for work' and 'will work from home a lot more'



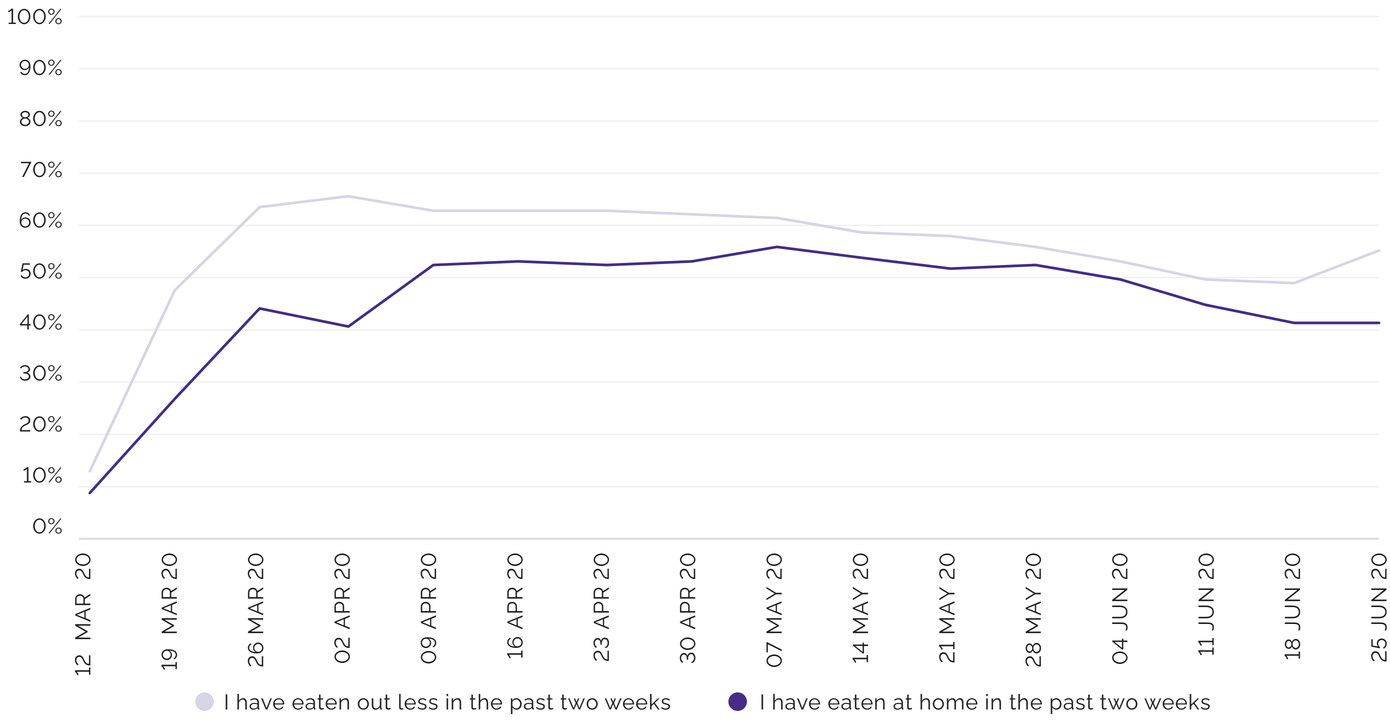
Our data suggests that between May and August 2020, more workers – rising to a third of Britons in employment – believed that they would "travel much less for work" and "work from home a lot more" in the future.

2

Eating

As the pandemic grew, increasing numbers of Britons reported eating out less and eating in more. Our data shows just how much.

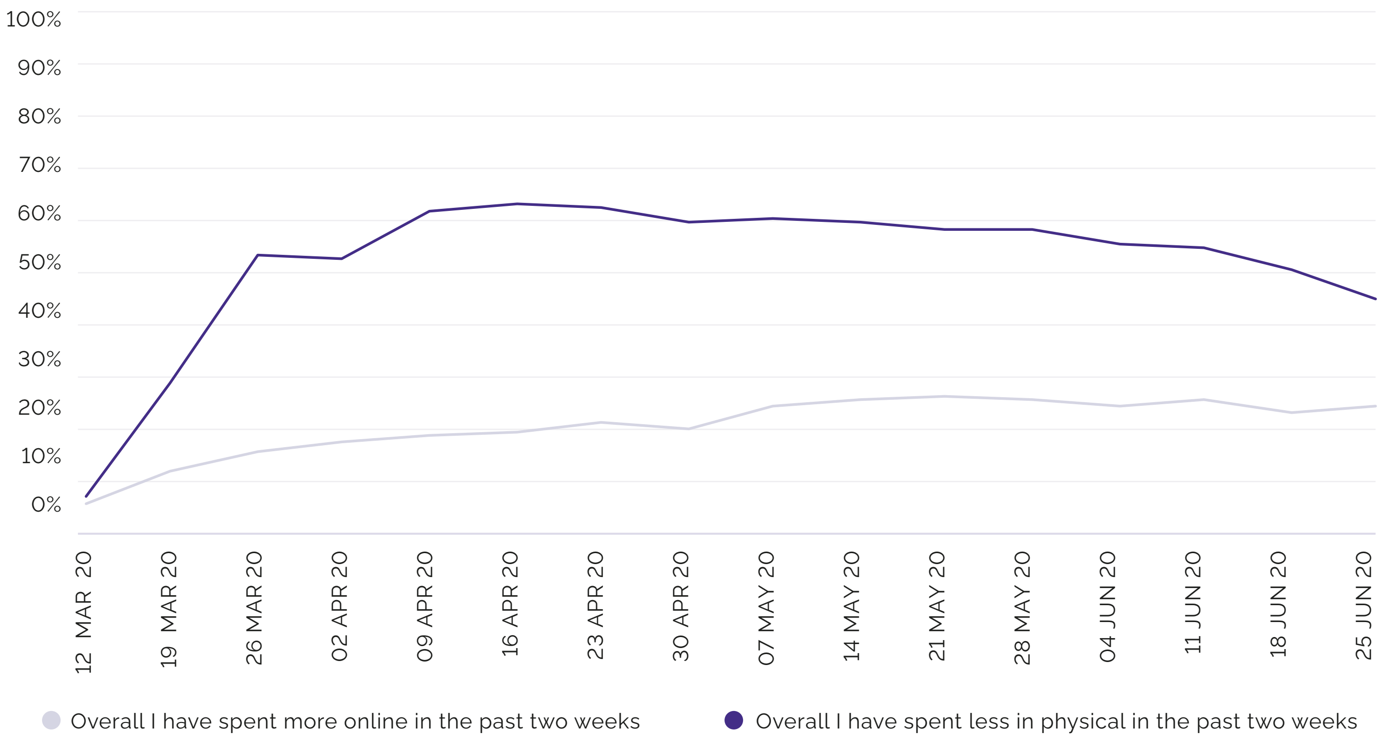
Brits have eaten at home more and eaten out less



3

Physical spending reduced – while overall online spend grew

Brits have spent more online and less in physical stores



As consumers spent more time at home, their opportunities to spend in-store fell away. And while more Brits reported spending more online over the same period, they didn't do so in the same proportions of those who spent less in physical stores.

GB media consumption habits

As in America, it makes sense that as people's lives have changed, so have their media consumption patterns. In this section, we examine the habits of Britons in four distinct areas:

Watch | Listen | Read | Social

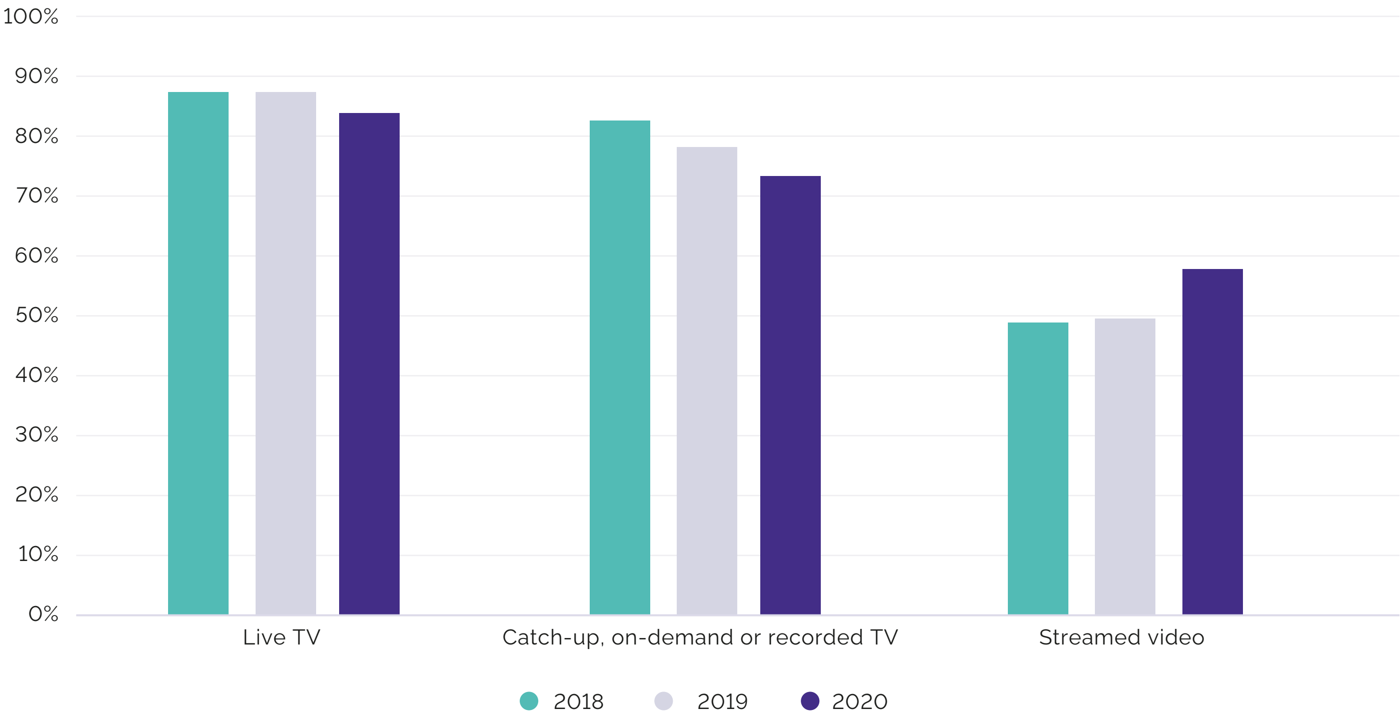
1

Watch

In Great Britain, watching live TV continued to dominate the market, and overall viewership of live TV changed very little. However, COVID-19 contributed to accelerating the growth of video streaming – both in terms of audience size and time spent.

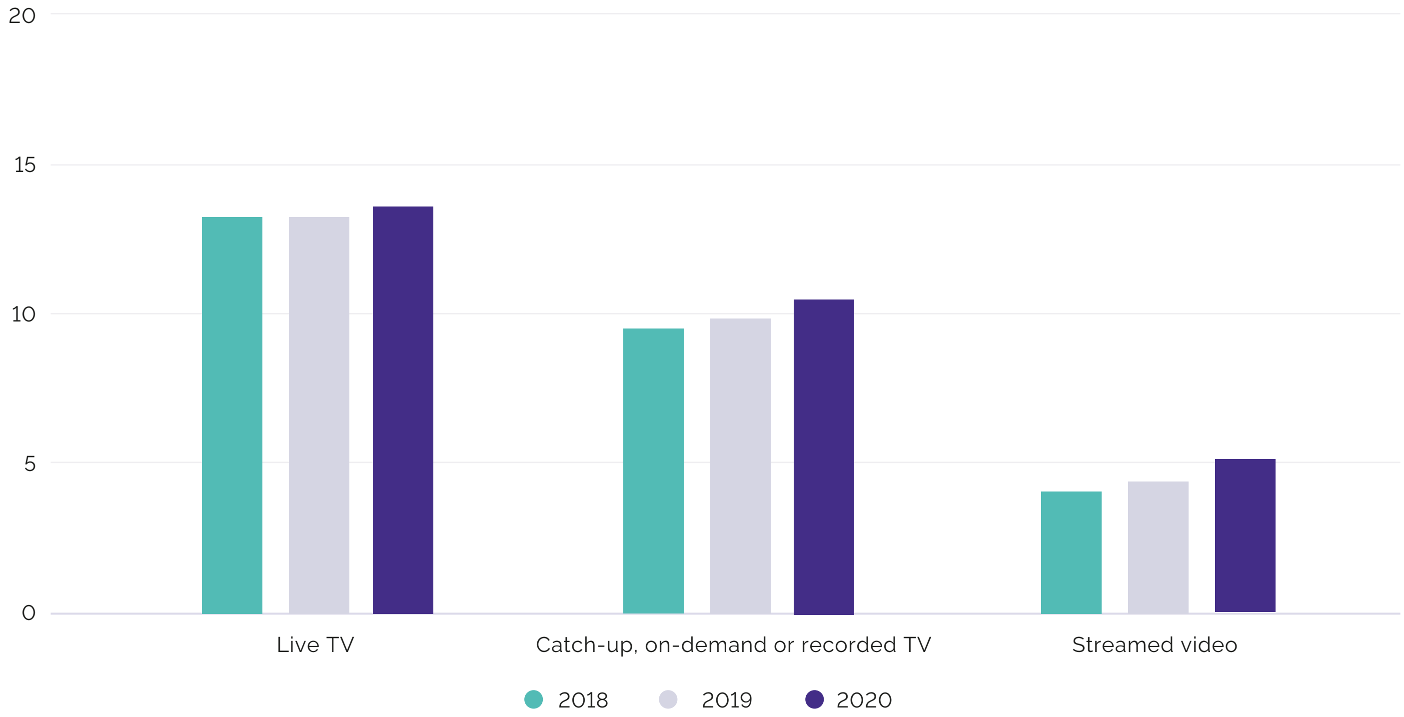
On-demand TV in Great Britain is in a unique situation. There has been a decline in audience size at the same time as an increase in time spent per viewer using on-demand. That means that the number of those who watch on-demand has fallen, but those who do watch view more.

GB: Live TV, catch-up & streaming viewers



The time spent watching every method increased in 2020. While live TV saw modest growth, those still watching on-demand TV spent about a half hour more per week doing so. Streaming both increased its audience and the time each viewer spent watching, which grew by just over a half hour more per week compared to 2019.

GB: Live TV, catch-up & streaming average hours per week (among viewers)

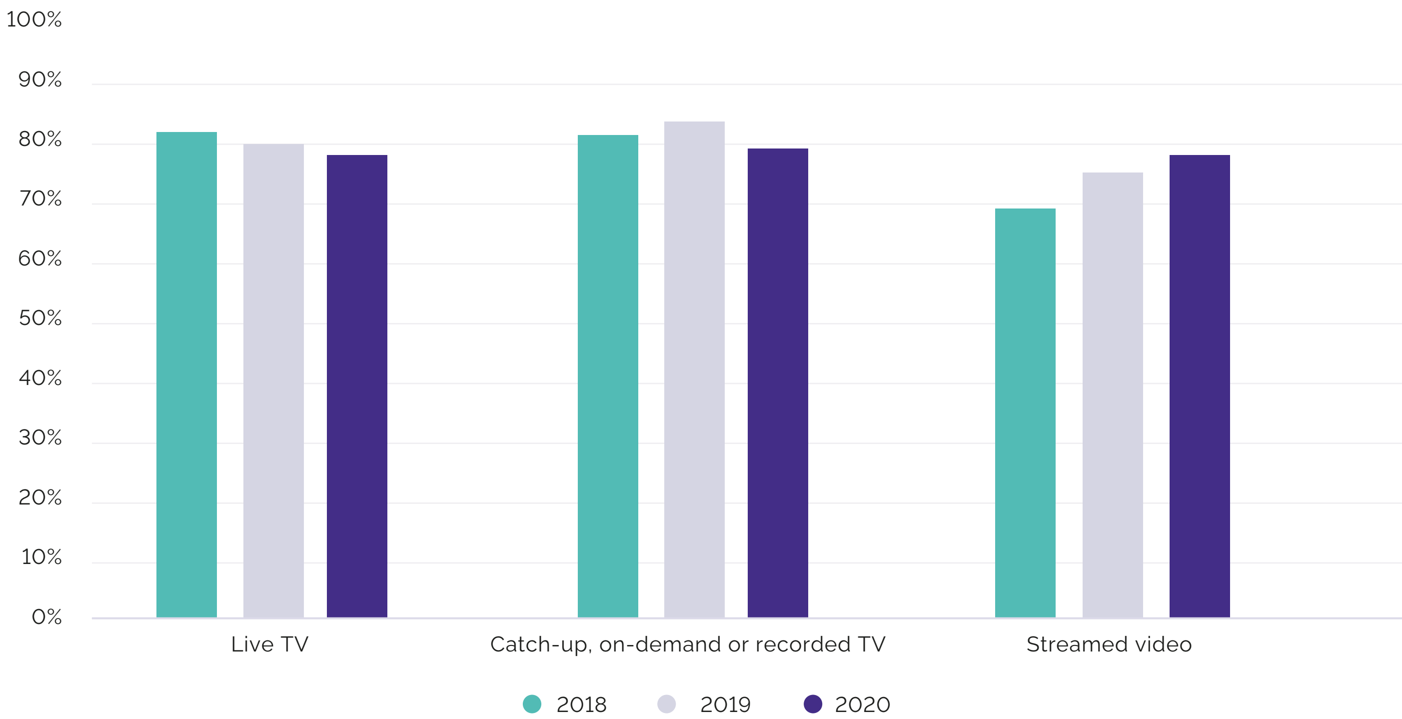


TV and streaming average weekly viewers and hours - by age

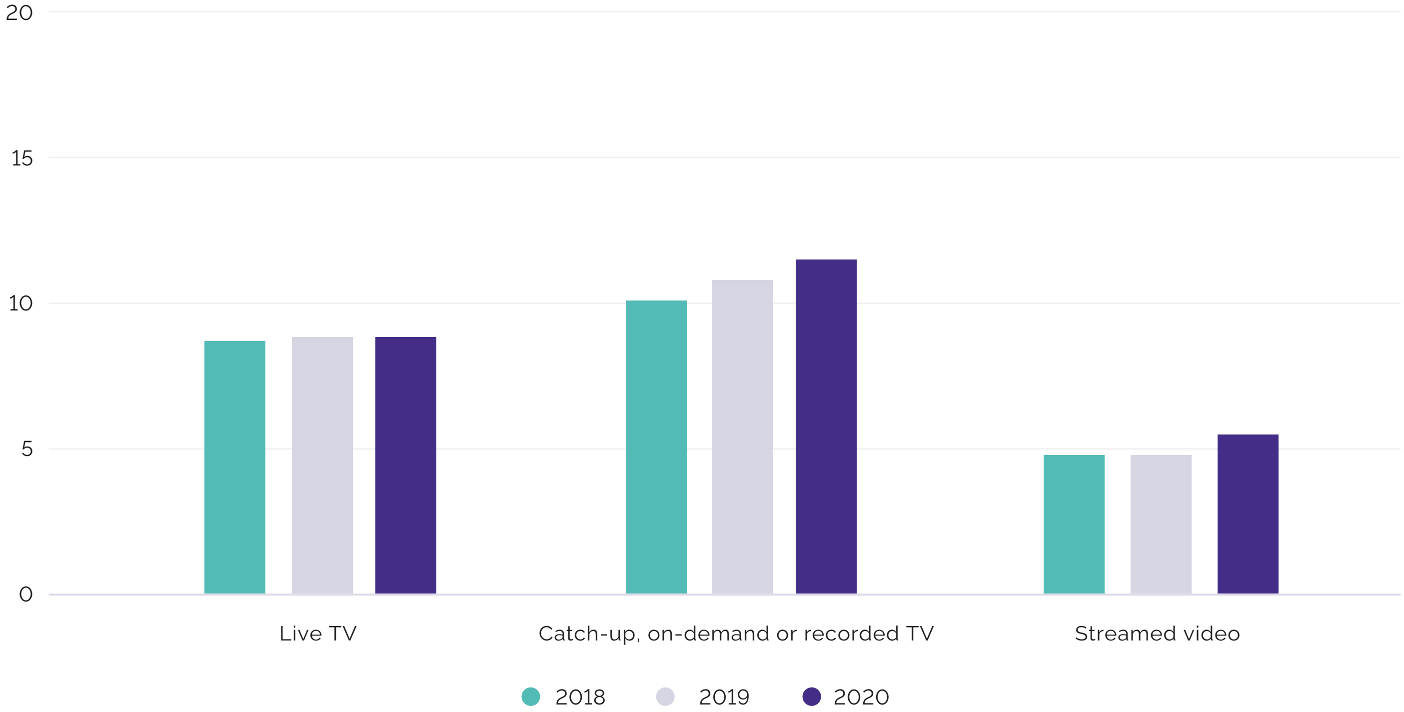
Looking at viewership by age in Great Britain, we see that the increases in both streamed video audiences and time spent are evident across every age group. However, there are slightly different contours to TV viewing among those under 35 and those over that age.

The relative stability of overall TV viewing in Great Britain conceals a slow downward trend among adults 18-34. In 2020, this group was as likely to have watched streamed video as live TV in the past week. They're also slower to leave on-demand TV versus their older counterparts, suggesting they continue to enjoy TV content but want flexibility about when they watch it. Although time spent viewing TV continues to be higher than streaming, it is flat. And while time spent watching streamed video is much lower, it increased in 2020.

GB Aged 18-34: Live TV, catch-up & streaming viewers



GB Aged 18-34: Live TV, catch-up & streaming average hours per week (among viewers)

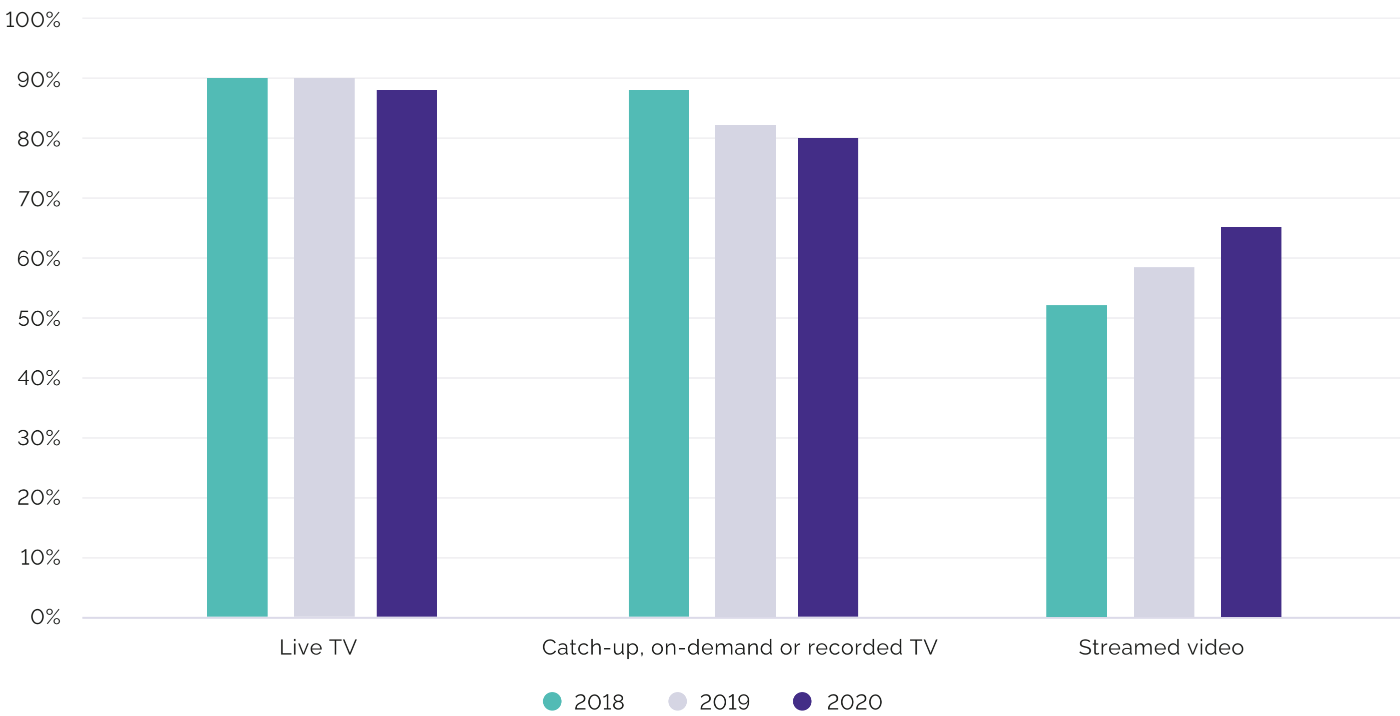


While TV's audience size among those aged 35-54 shrank slightly in 2020, the time viewers spent watching both live and on-demand TV increased by over half an hour a week each. The streaming audience continued growing at a similar rate to pre-pandemic times, and this cohort spent an additional half hour per week watching video this way.

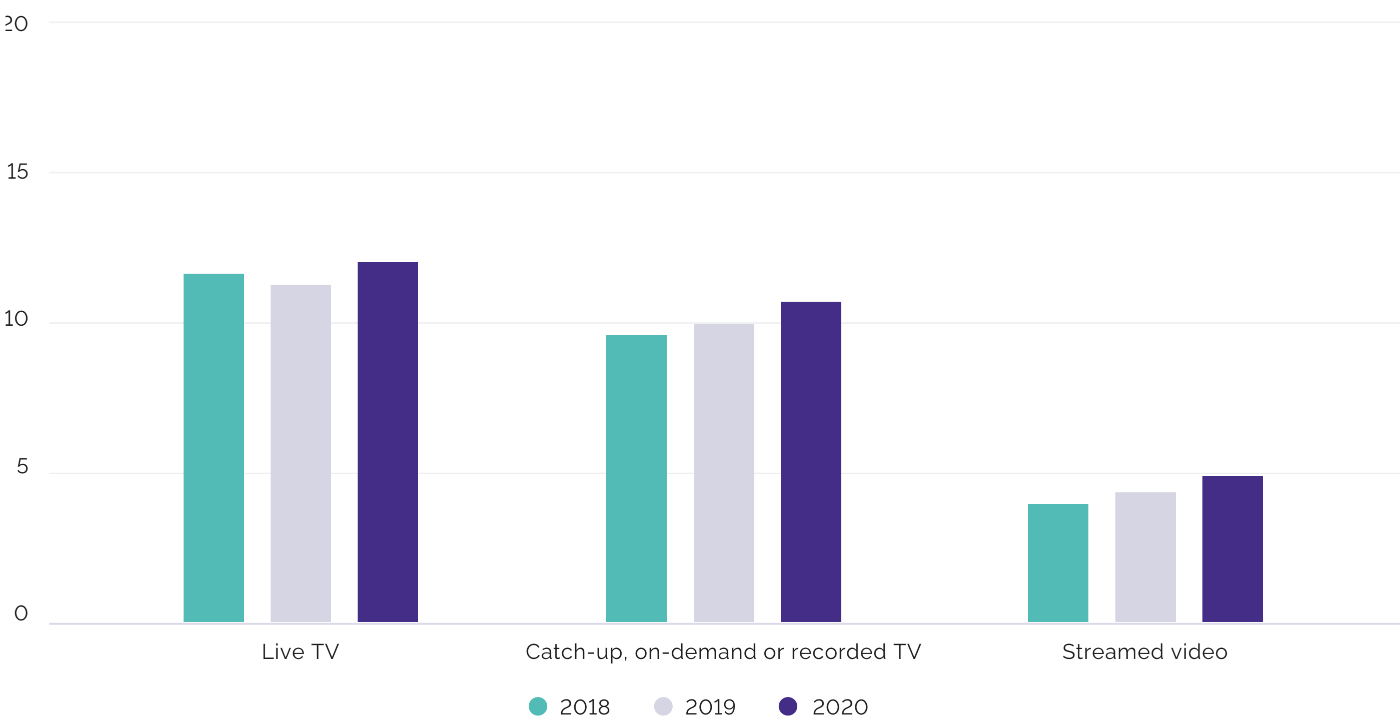
Those aged 55 and over remained the strongest live TV audience in terms of audience size and time spent, but there has been a slight erosion in audience over the past couple of years – a trend that COVID-19 did not halt.

However, time spent watching live TV grew by nearly an additional hour per week in 2020. On-demand TV's audience size continued to decline among those aged 55+, while the audience for streaming video increased. Time spent watching both of these options increased in 2020.

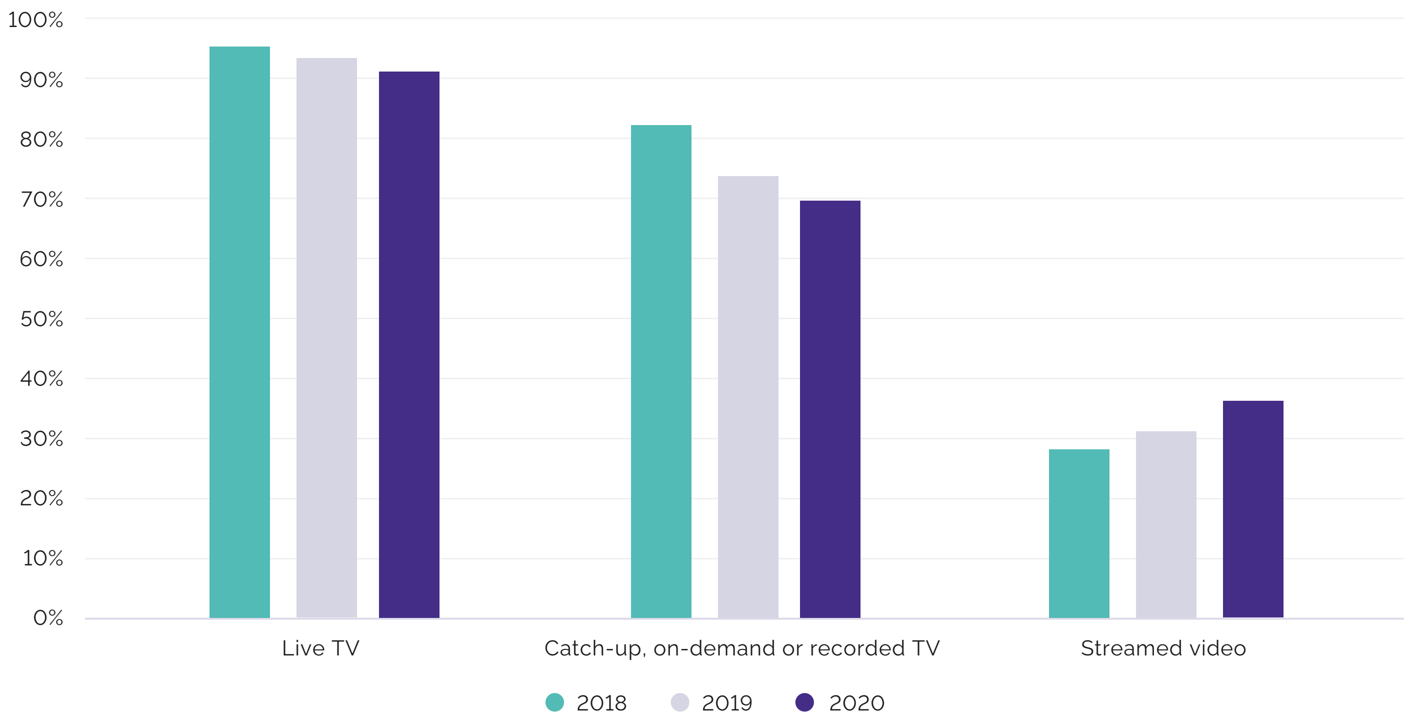
GB Aged 35-54: Live TV, catch-up & streaming viewers



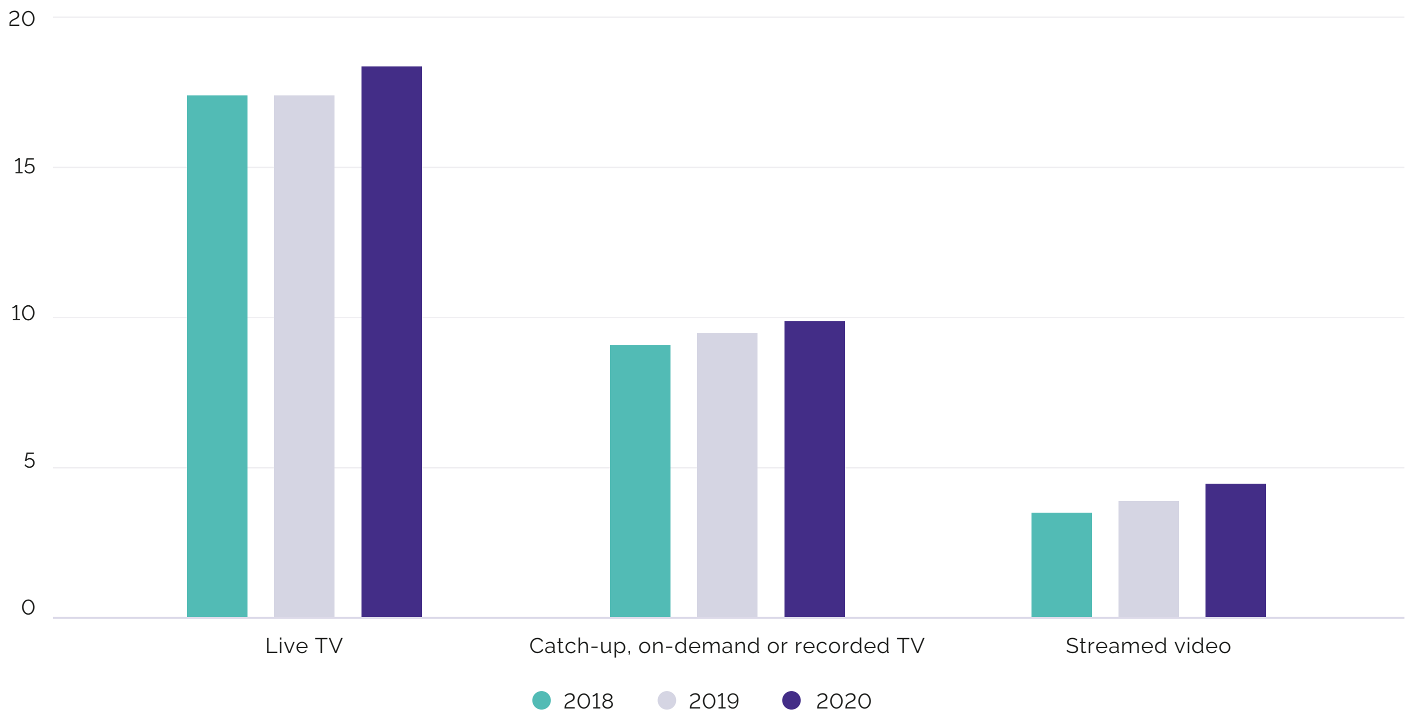
GB Aged 35-54: Live TV, catch-up & streaming average hours per week (among viewers)



GB Aged 55+: Live TV, catch-up & streaming viewers



GB Aged 55+: Live TV, catch-up & streaming average hours per week (among viewers)

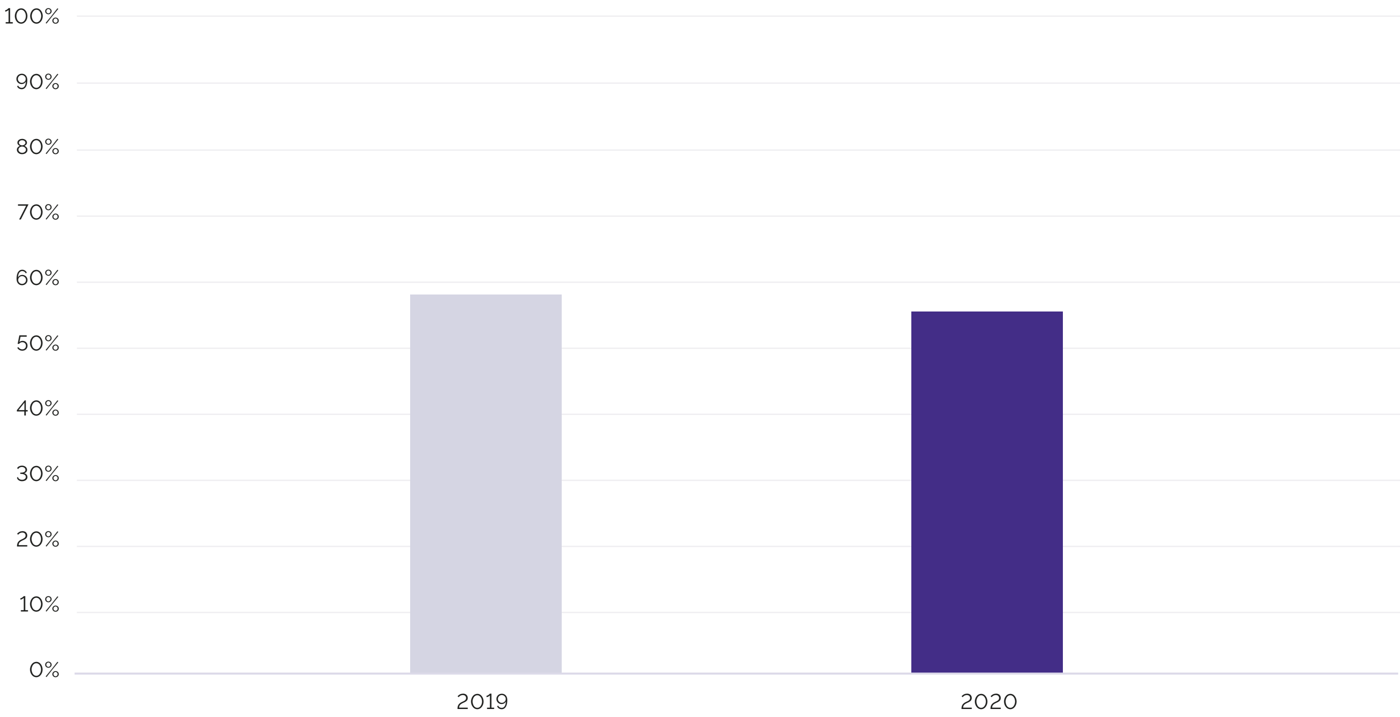


2

Listen

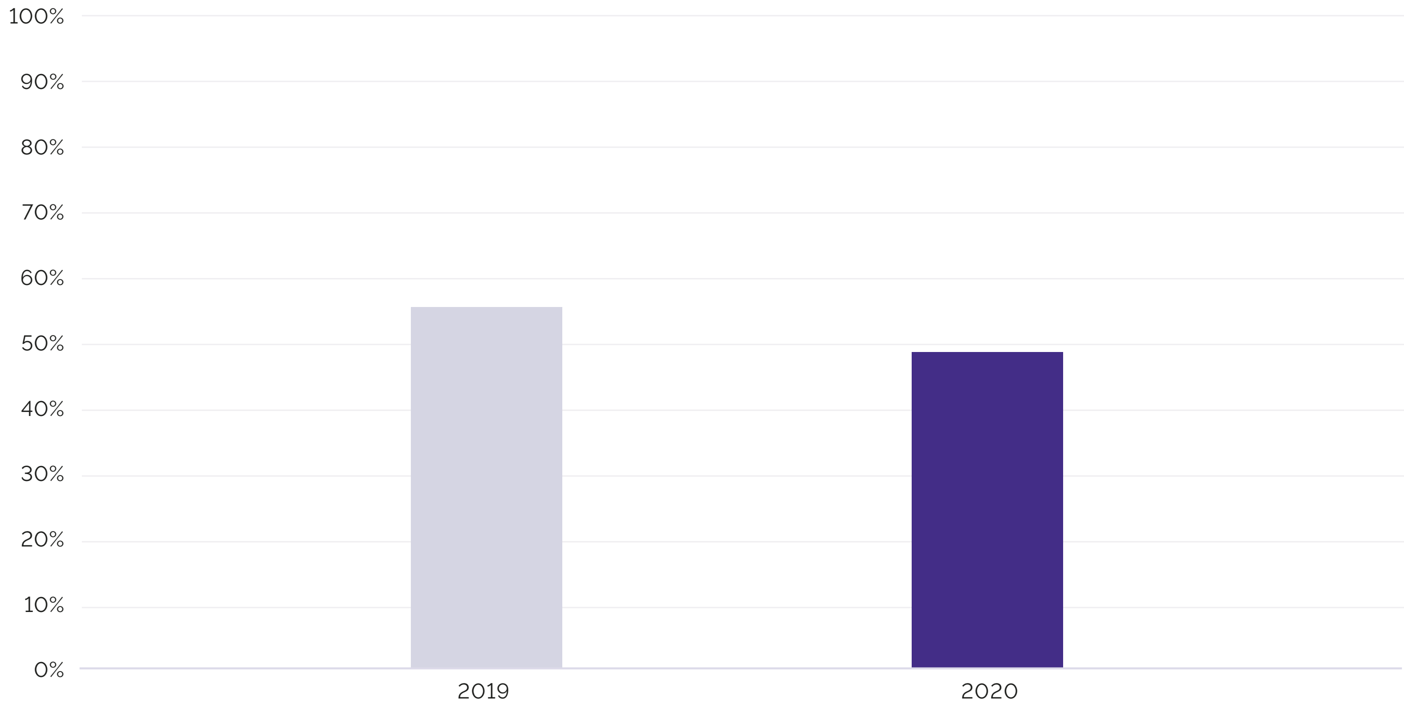
GB: Average Commerical radio listeners

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.



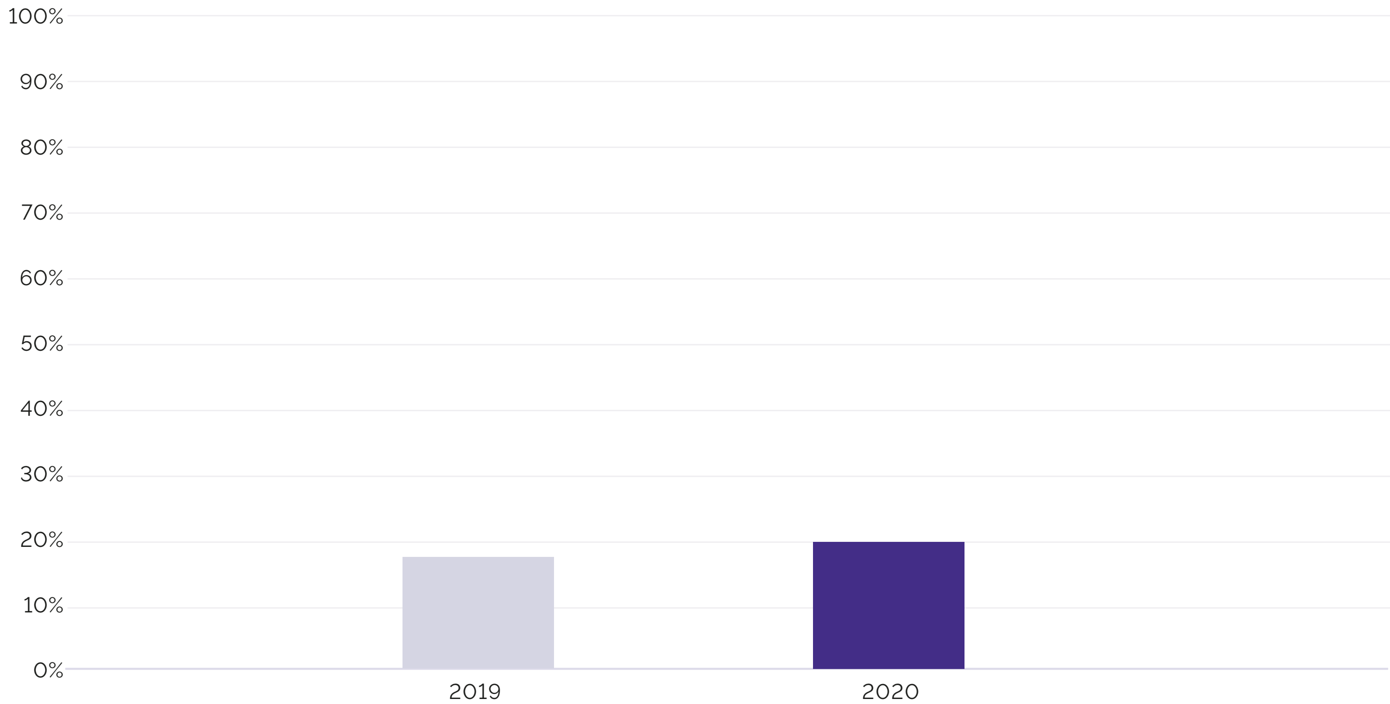
GB: Average BBC radio listeners

In a typical week, approximately, how many hours do you spend listening to BBC Radio? Please include times when you are listening to the radio while also doing other things.



Average Spotify users UK

Have you visited any of the following online service websites in the past 30 days?



YouGov data shows a noticeable decline in commercial radio listenership between 2019 and 2020 – decreasing by four percentage points from 59% to 55%. BBC listenership had an even steeper fall, dropping from 55% in 2019 to 48% in 2020.

This might be attributed to a decline in commuting following the UK government's instruction to work from home where possible at various points of the year. This trend could also be exacerbated by the increase in must-see content on TV, including the news.

Use of some streaming brands also increased year-on-year. For example, Spotify users have increased from 18% of the UK (not GB) population to 20%.

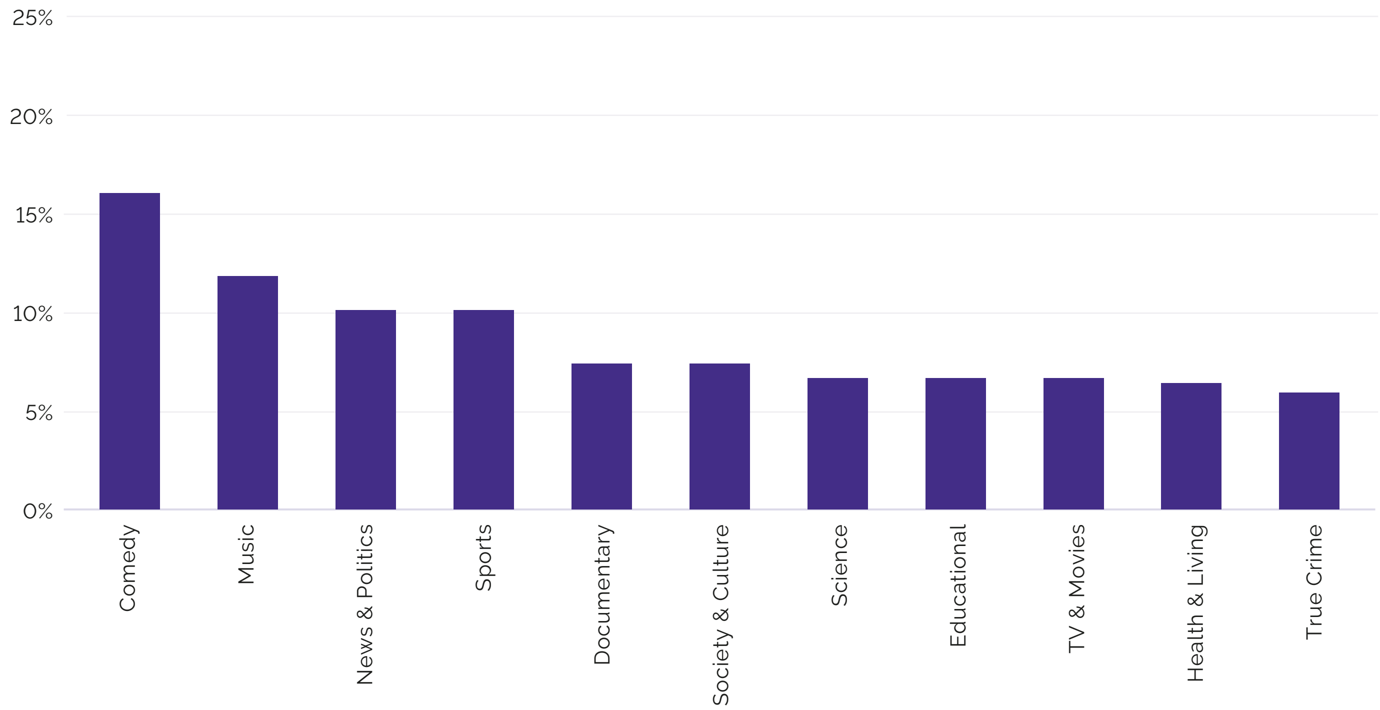
GB: Average podcast listeners

Approximately, how many hours per week do you typically spend listening to podcasts?

Podcast listenership increased in 2020, just as it did in the US. The increase has been significant, too, rising from 27% in 2019 to 33% in 2020. As we write above, some commentators speculated that a reduction in the time spent on commuting and other activities would impact listenership. However, this data suggests that this is not the case for podcasts and that people continue to find time to listen to content through this medium.

GB: Podcast genres regularly listened to

Which, if any, of the following genres of podcasts do you regularly listen to? Please select all that apply.



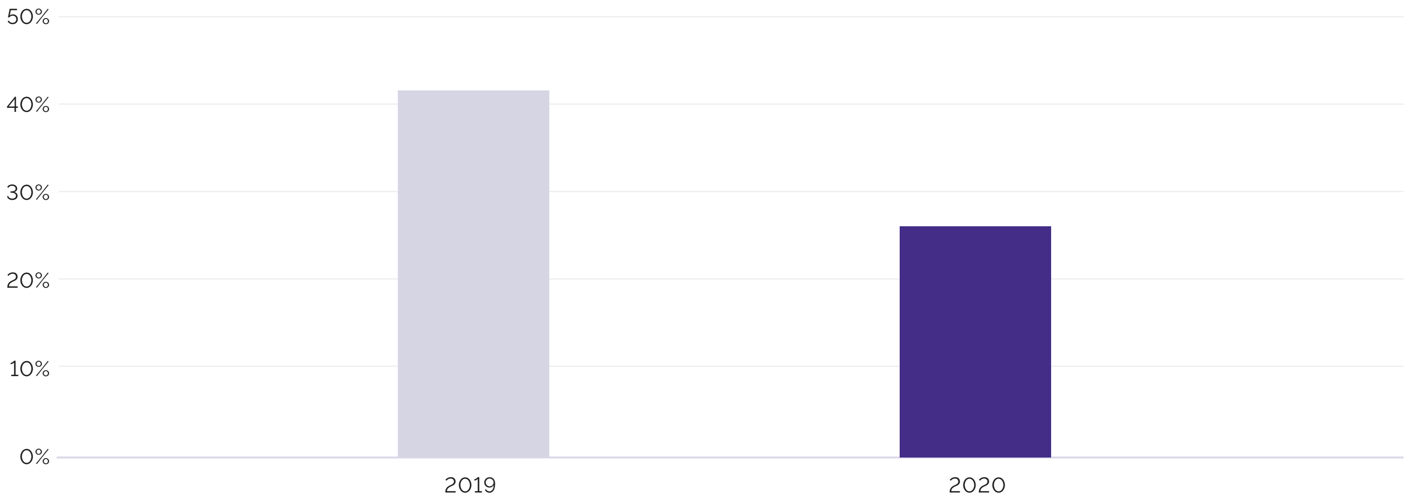
The most popular podcast genres in the UK over the last 90 days are comedy and music. News and politics take a strong third place - something which may coincide with the move away from newsprint, and perhaps providing an option for advertisers who have previously utilized the more tangible medium.

3

Read

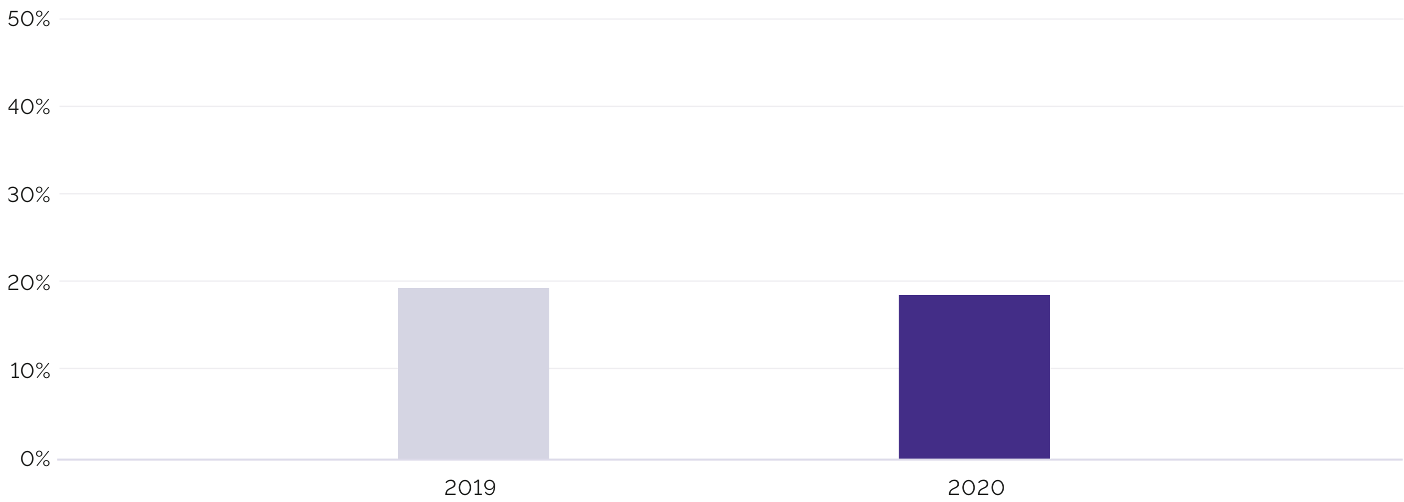
GB: Average print magazine readers

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 magazine rather than reading online or through any other medium.[4]



GB: Average digital magazine readers

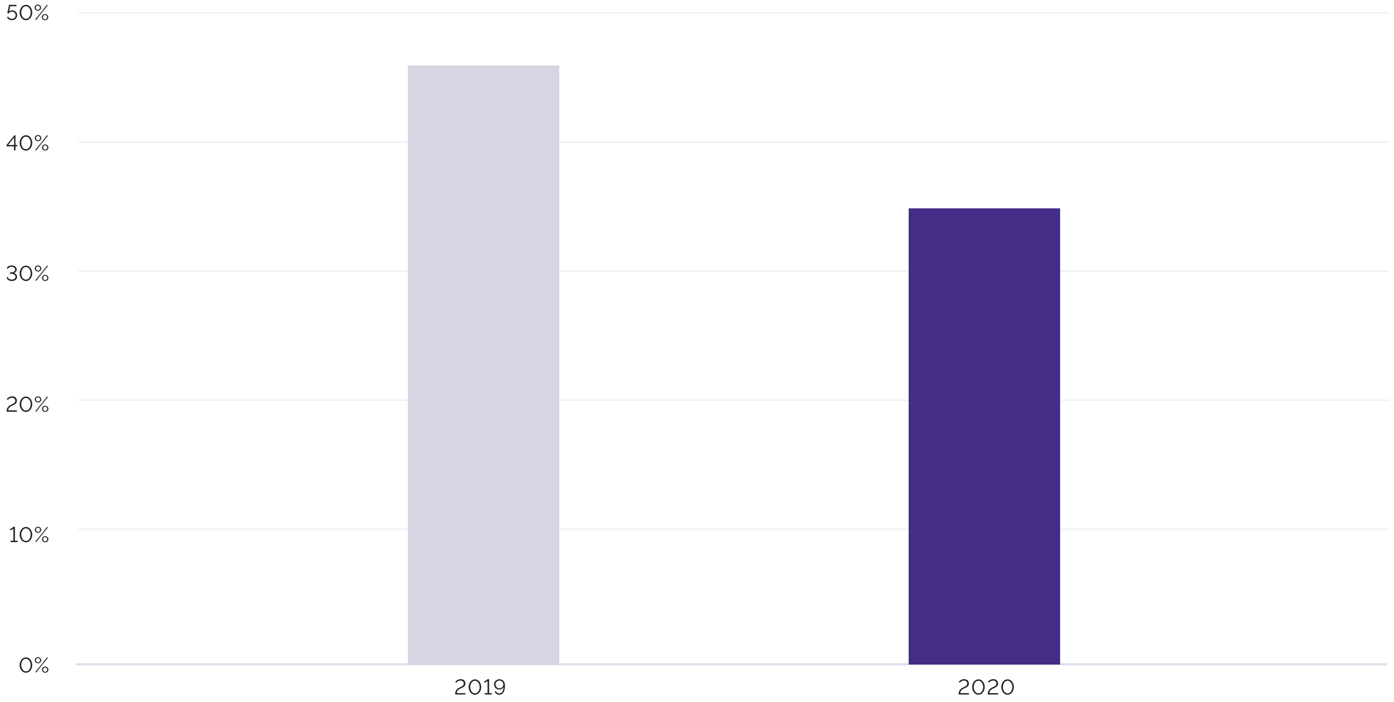
Approximately, how much time in total, if at all, did you spend reading or looking into magazines in electronic form in the last week? Please do not include reading or looking into a newspaper's free website.[4]



[4] This question is used to calculate the overall percentage of the population who consume this medium

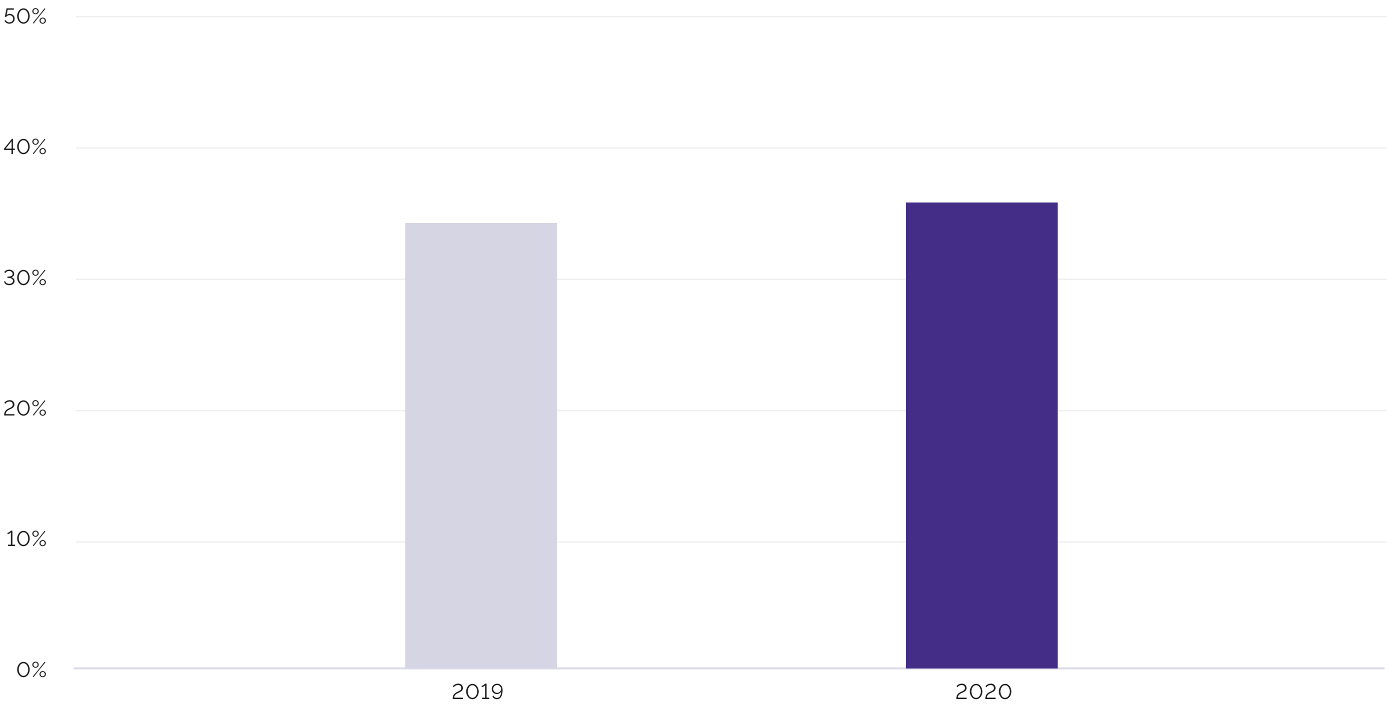
GB: average print newspaper readers

Approximately, how much time in total, if at all, did you spend reading or looking into daily newspaper printed on paper last week in the last week? Please do not include reading or looking into a newspaper's free website.[5]



GB: Average digital newspaper readers

Approximately, how much time in total, if at all, did you spend reading or looking into daily newspaper in electronic form in the last week? Please do not include reading or looking into a newspaper's free website.[5]

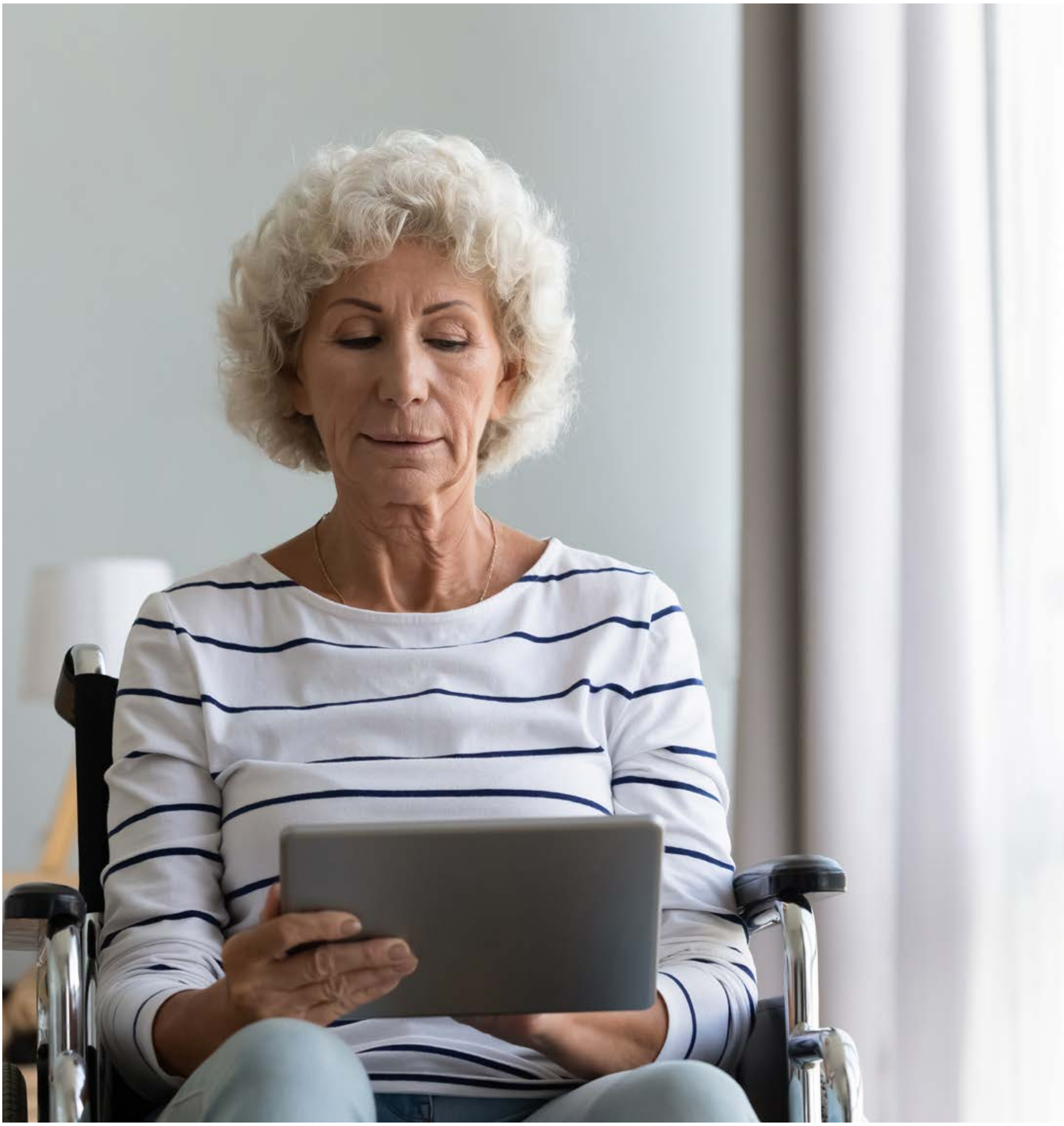


[5] This question is used to calculate the overall percentage of the population who consume this medium

Our data shows a significant decline in some print consumption amongst the British public and a relatively static year for equivalent digital channels.

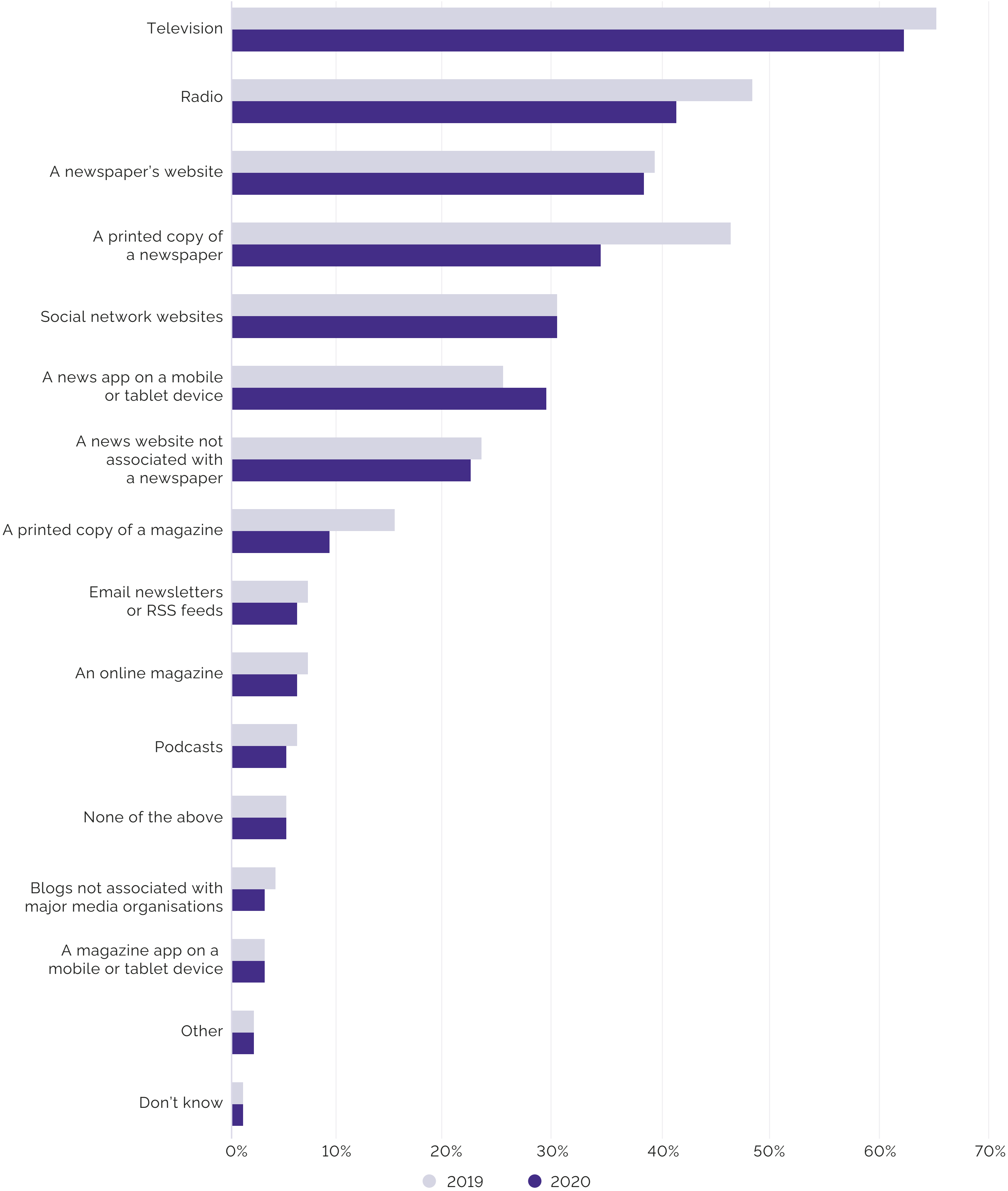
Both print magazine and print newspaper readership fell by double digits, year-on-year. Digital readership of both fared better, suggesting that these mediums may have held up relative to their US equivalents.

2020 saw some change in Britons' favored news sources. All but one source of news became less popular over the year - the exception being news from a tablet or mobile app. These apps and social media sites are now rivalling print as a favored source.



GB: Sources used to access news

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



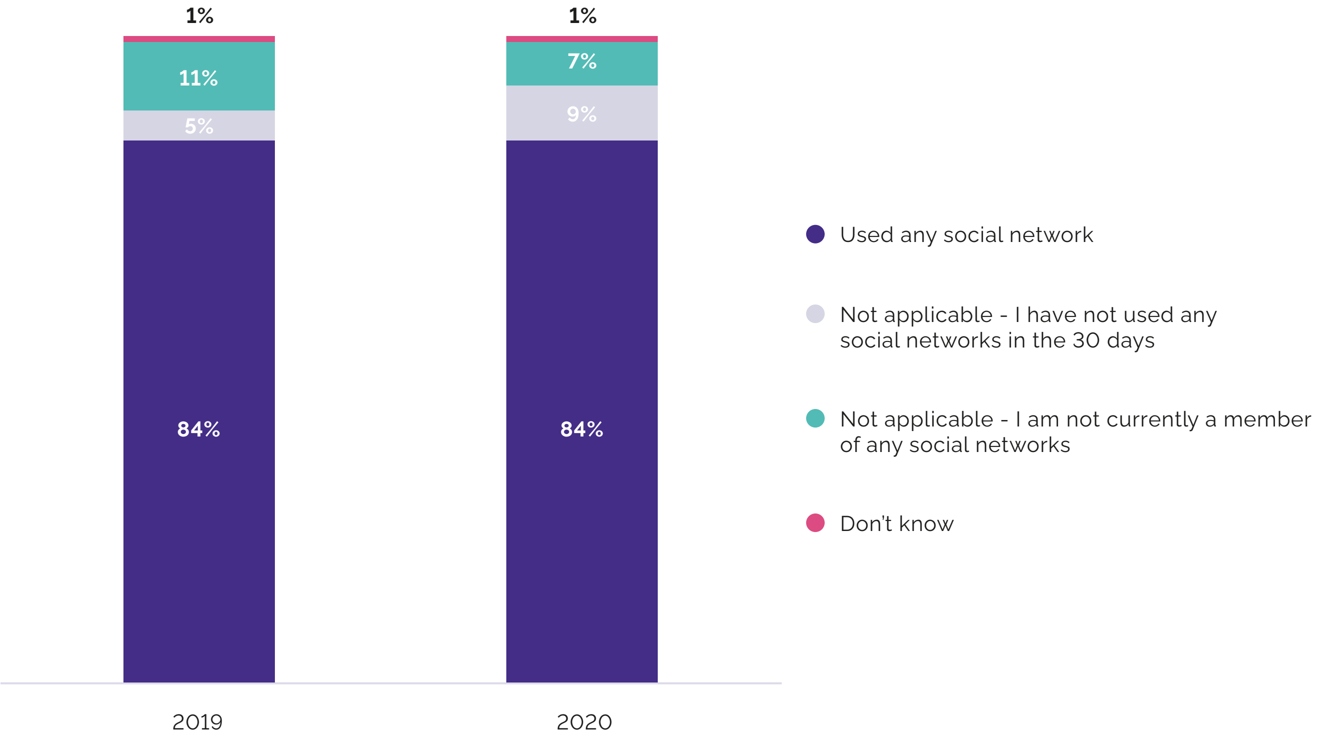
However, newspapers continue to retain their authority in Great Britain, unlike the US where nearly four in ten turn to news websites not associated with newspapers. It's worth noting here that this data doesn't describe a decline in news consumption – only changes to how it's consumed.

4

Social

GB: Average users of any social network

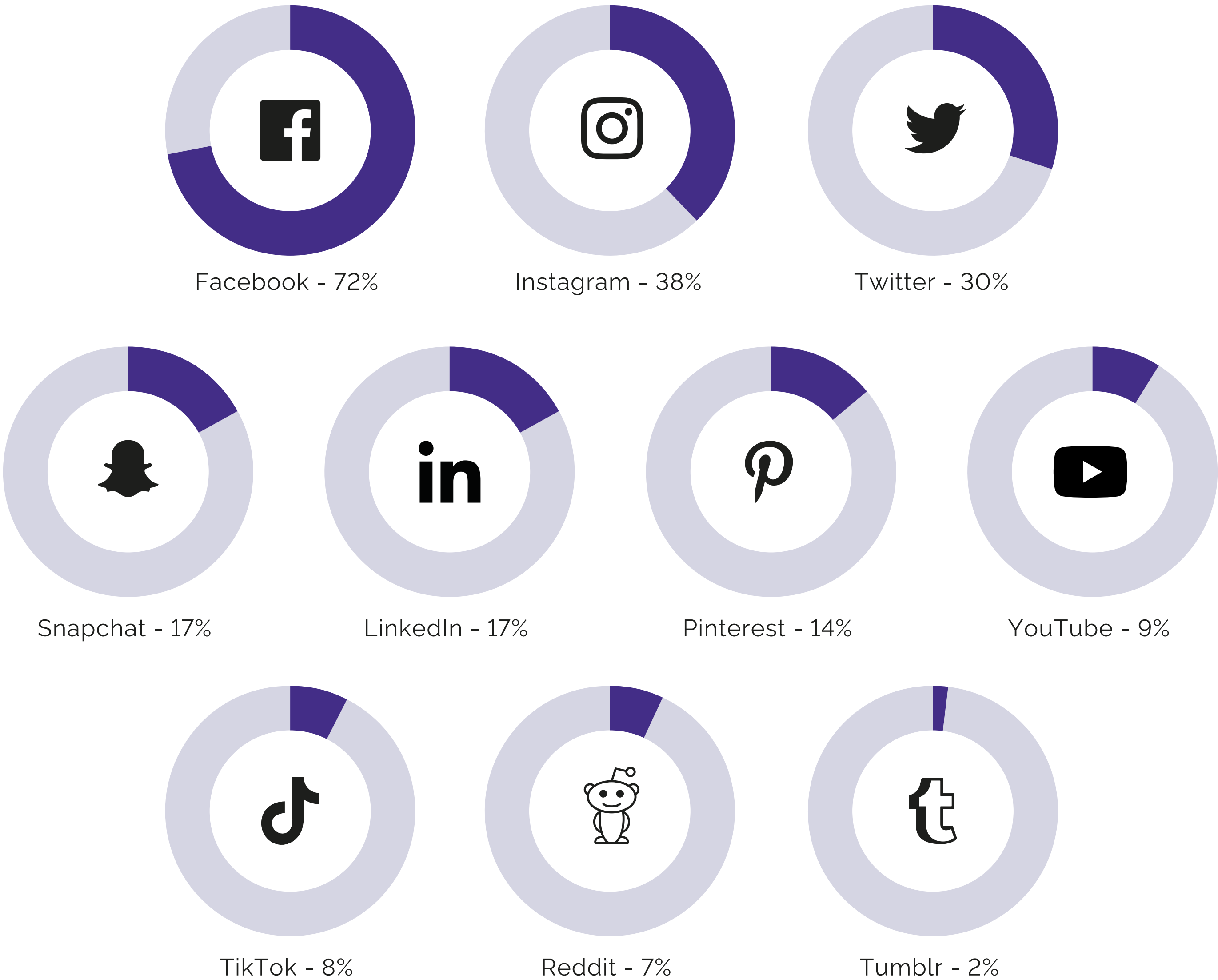
Which, if any, of the following social networks have you used within the last month? Please think about any occasion on which you either visited the website directly, used a mobile application to access the network,



> The proportion of Britons who haven't visited any social media sites recently has doubled, begging the question of whether the pandemic and lockdowns have turned some of us away from social."
>
> **Jules Newby,** *Sector Head of Media*, UK/Europe and RoW

GB: 2020 Average social media usage

Which, if any, of the following social networks have you used within the last month? Please think about any occasion on which you either visited the website directly, used a mobile application to access the network, or shared something through the network via another service.



Usage of social networks didn't change between 2019 and 2020 – the proportion who said they had used these platforms in the past month stayed at 84%. Once again, it's possible that these activities are so well embedded in the lives of most British people - in everything from staying in touch with people and news to buying and selling goods and services - that the pandemic has not made much of an impact.

Facebook continues to dominate British social media consumption (the data here is from December 2020). In a tier below come Instagram and Twitter, with consumption of between 30% and 40%, followed by Snapchat, LinkedIn and others.

Key takeaways for the British market

The most notable movements in Great Britain between 2019 and 2020 included:

- A sharp increase in streaming viewership – up eight percentage points
- An increase in the proportion of people who listen to podcasts – up six points
- A four-point decline in commercial listenership
- A reduction in the proportion of people reading print but stasis in digital news and magazine readership

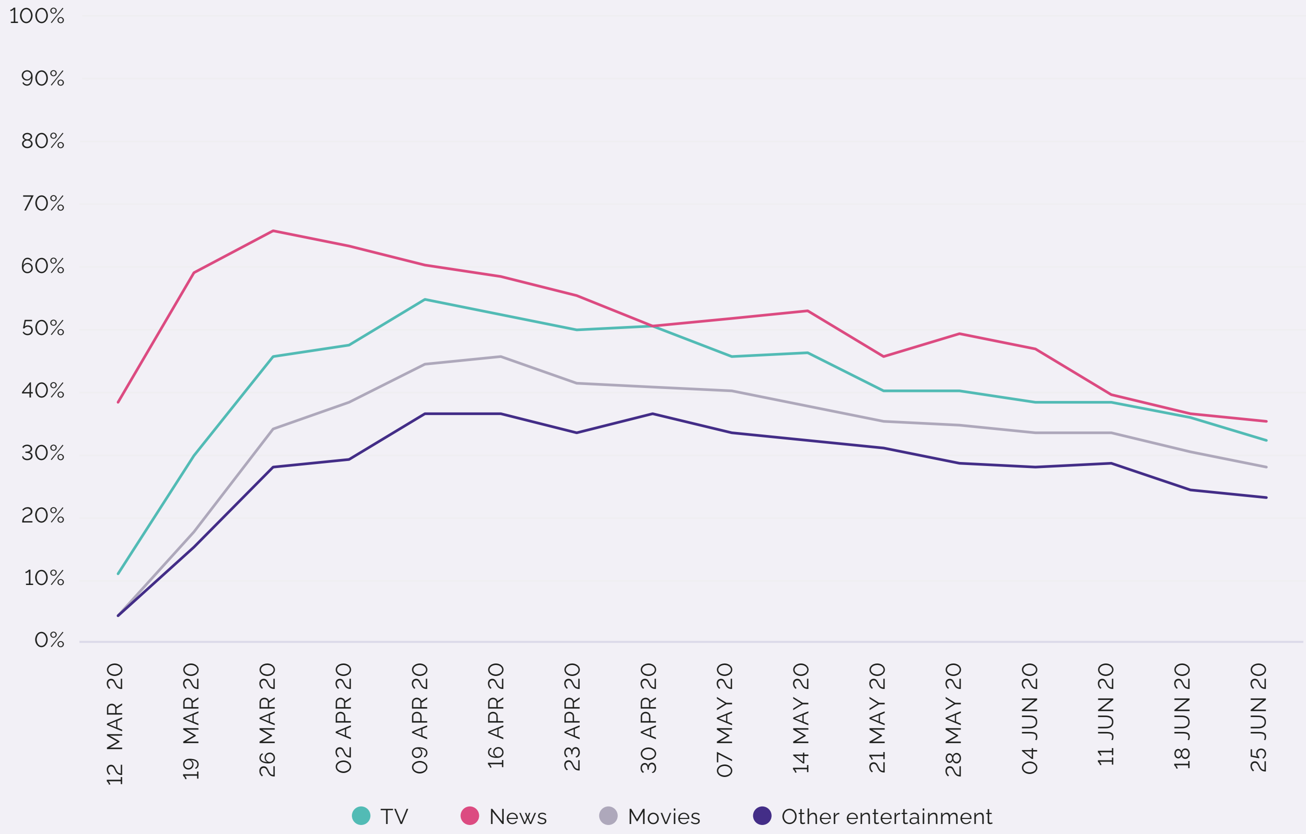
How our media experience changed – some examples

In Great Britain, consumption of certain types of content sharply rose as measures were introduced to contain the virus. Here are a handful of examples.

1. News, movies and entertainment content became more popular

Just like in the States, there was a dramatic increase in consumption of a range of types of content over the summer. News continued to be the most popular content type but there were also big increases for movies and other types of entertainment. But as in America, the trend to consume more fell away over the summer, as the environment changed. Even allowing for any seasonal patterns, these dramatic changes at the start of the pandemic appear significant.

Brits consumed more of this content



2. Video on-demand sector saw winners and losers

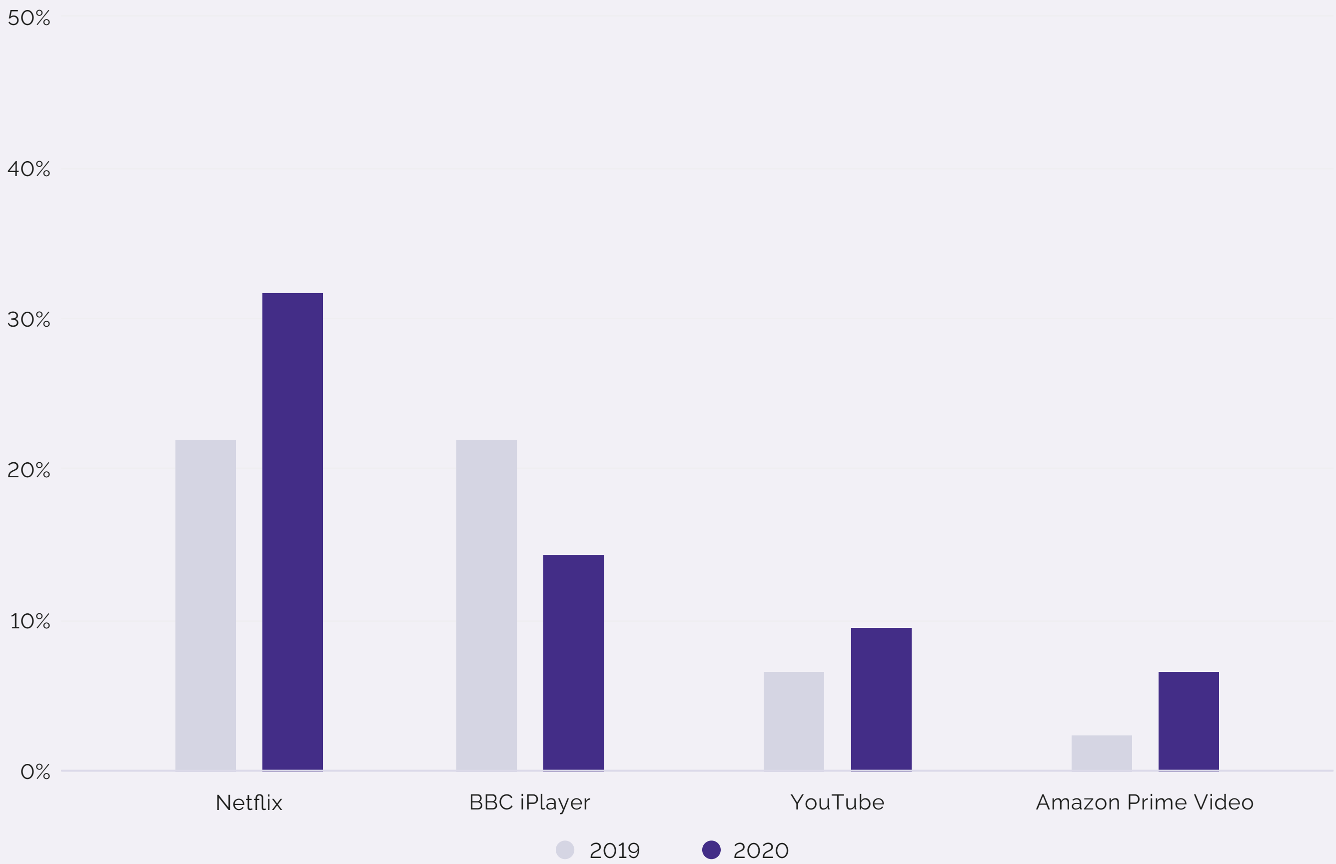
In Great Britain, Netflix and YouTube saw the biggest gains in terms of who is the on-demand favorite.

Netflix saw larger gains in Britain than it did in the US (where its favorability rose from 23% to 25%), rising by ten percentage points (22% - 32%). As of 2020, more Britons favor Netflix as a proportion of the country's overall population than Americans (32% compared to 25%).

YouTube as a favorite only rose by three percentage points – from 6% to 9% - but that was much better than the BBC iPlayer fared. It fell by eight percentage points (from 22% to 14%) year-on-year.

GB: Most used streaming services

Which, if any, of the following catch-up or on-demand services do you use the most (on any device)?



3. We still listened to the radio – but the environment changed

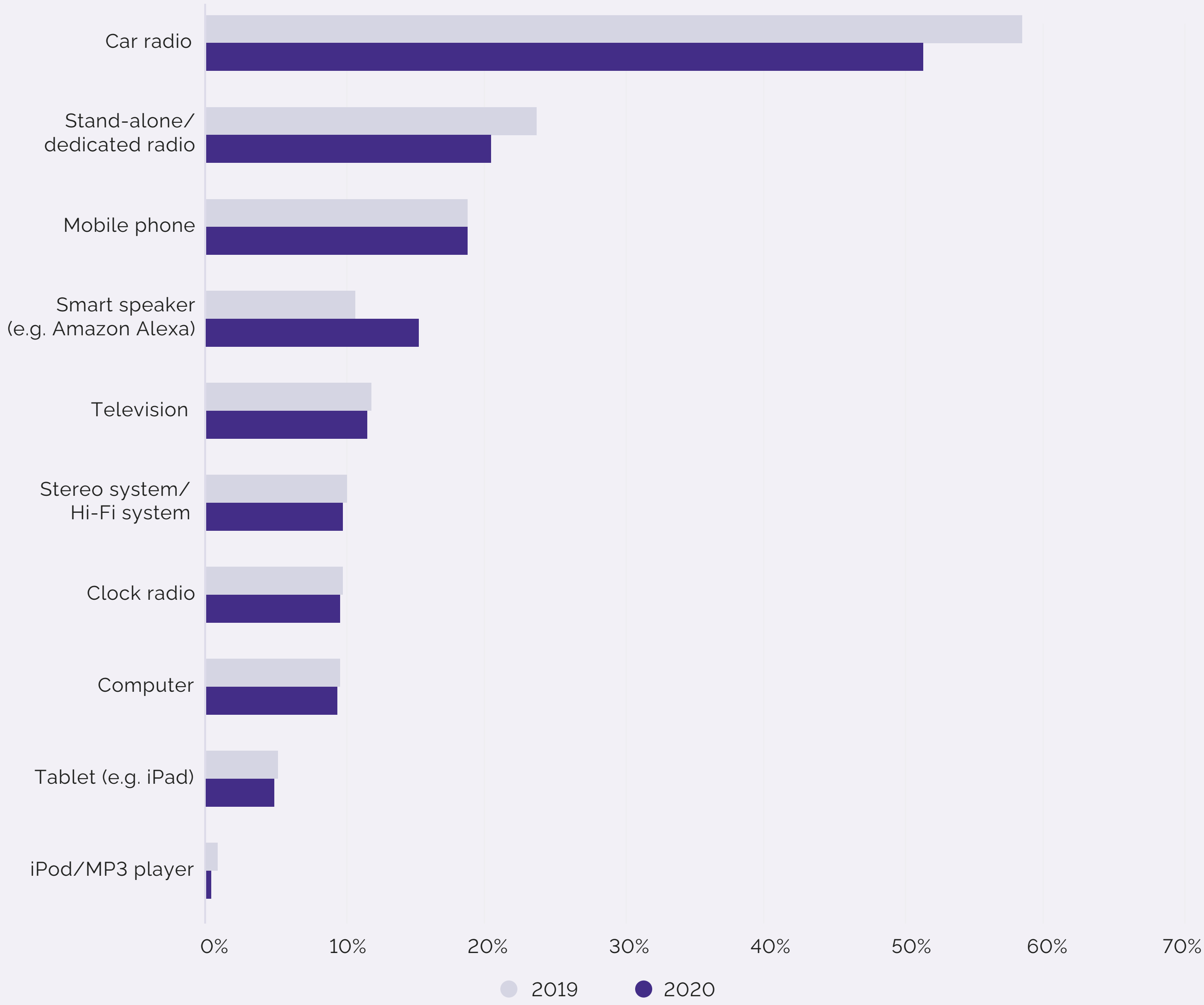
As we describe above, radio listenership declined in the UK in 2020. And, just as it did in the US, the way that people listen also changed.

As people avoided non-essential journeys, the proportion of the public listening to their car radios in 2020 declined year-on-year.

More Britons tuned in on their smartphones and smartspeakers but consumers were less likely to listen to the radio on their computers, TVs, stereos, tablets, clock radios and standalone radios.

GB: Devices used to listen to the radio

Which, if any, of the following devices do you use to listen to the radio? Please select all that apply.

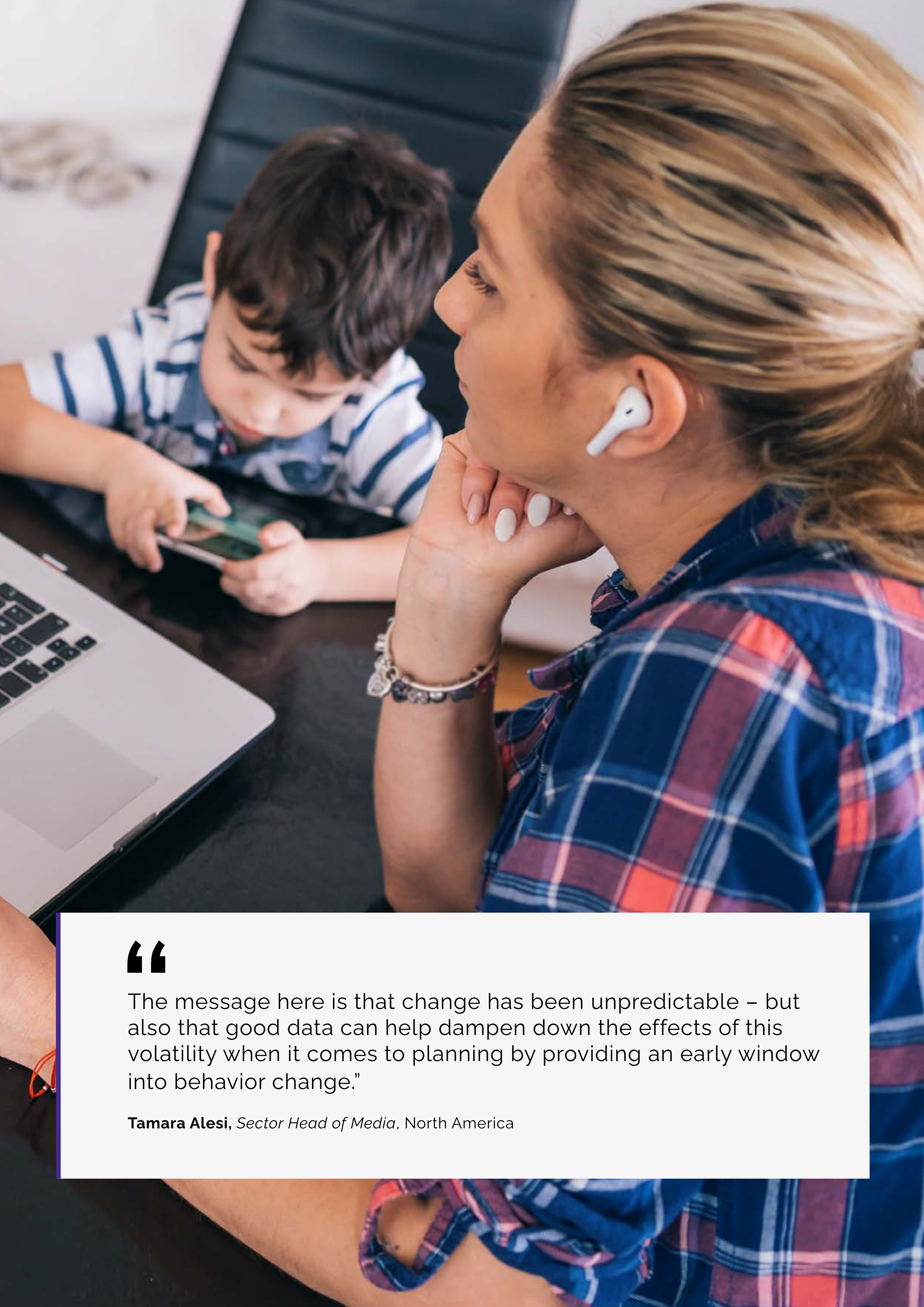


Conclusions

Taken as a whole, this data represents an enormous challenge to the media industry at large – as well as to the brands using these channels to reach their market.

Because behaviors and consumption patterns have changed so much, there are questions to be answered not just about how to reach consumers but also about what messages to reach them with and, for some brands, whether to reach them at all.

Overall what is clear is that people are understandably spending more time at home. That means less time commuting, more time with families. Less time with some types of media (like out of home), more time with others (like streaming and on-demand). Suggestions that consumption of some channels (like podcasting) would decline have not come to pass. At the same time, while the decline of live TV seems to have been arrested, the long-term fall in consumption of others – like magazine/print news readership – looks to have continued and even accelerated.



“The message here is that change has been unpredictable – but also that good data can help dampen down the effects of this volatility when it comes to planning by providing an early window into behavior change.”

Tamara Alesi, *Sector Head of Media*, North America

MEDIA CONSUMPTION ACROSS THE GLOBE

Having looked specifically at the US and Great Britain, in this section, we widen our analysis and present media consumption levels in 17 markets around the globe for 2020, as well as some deeper dives into other specific markets and audiences. Future editions of this report will use these benchmarks for year-on-year comparisons, allowing brands and planners to track habits, inform strategies and make smart planning decisions.

But even as standalone 2020 figures, this data makes for interesting reading – revealing the significant differences within markets and some surprising numbers across them.

Take outdoor advertising, for example, which many planners and brands may have assumed to be at least partially redundant in 2020. Even in this pandemic year, 33% of consumers across our markets tell us that they have seen a billboard or bus-stop poster in the past week. That suggests that the medium continues to have relevance as part of the broader marketing mix, even if it is possible that consumers are seeing fewer sites and that those sites are closer to home than ever.

Consumption of outdoor advertising outstrips readership of print magazines and newspapers in most markets, as well as more emerging channels like podcasts (with an average listenership of 13% of all consumers across all markets) or on-demand radio (16%).

And while all of the above pale in comparison to our global consumption of digital media (60% of consumers told us that they used social media in the week prior to being asked), that data shows that it makes only limited sense to think of consumers as digital-only or traditional-only media citizens.

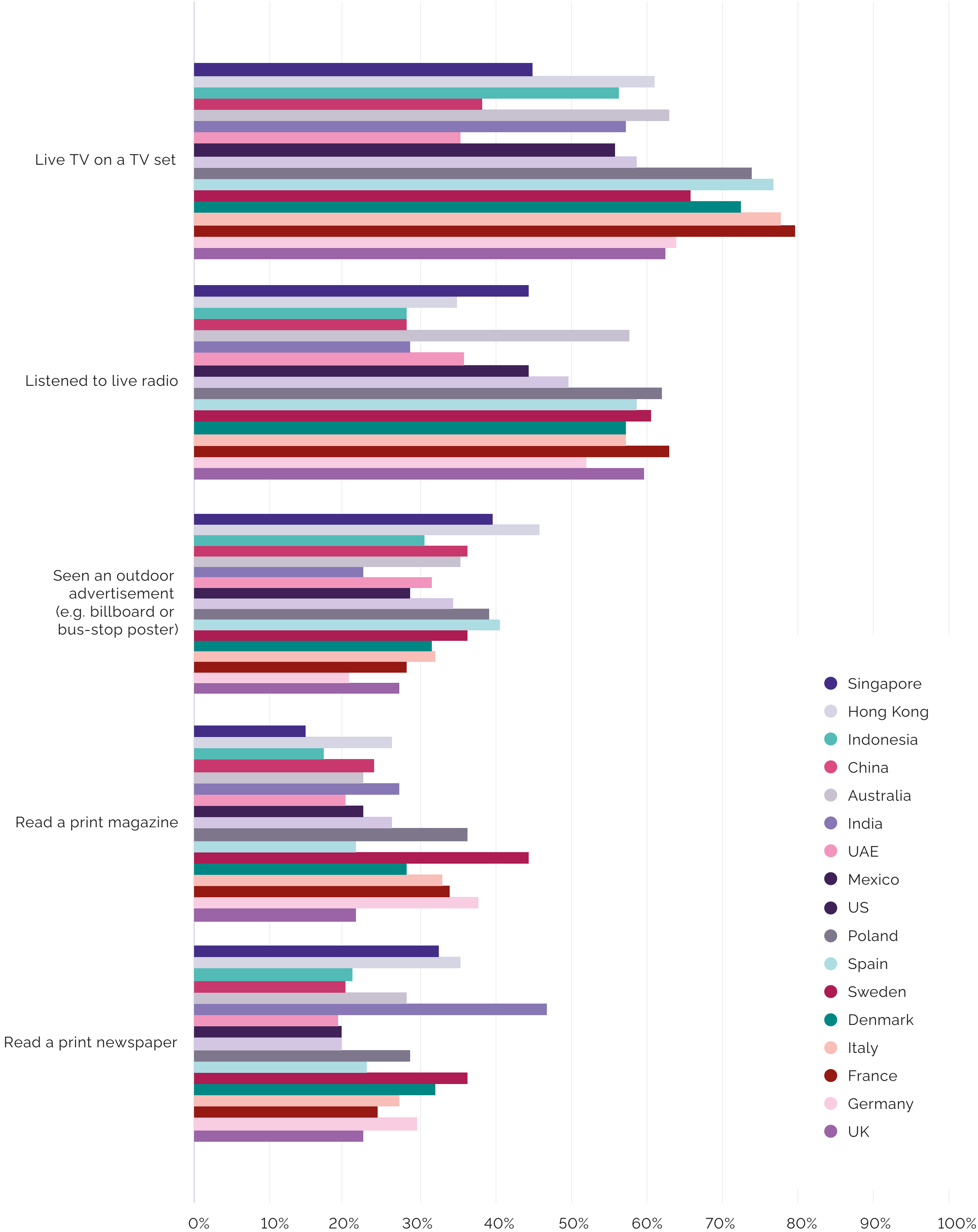
Global data

Our data from around the world illustrates the age-old importance of understanding your audience when it comes to marketing.

What comes as no surprise is the divergence between markets – for example only 35% of UAE residents told us that they watched live TV on a TV set in the previous week, compared to 79% of French people. What is more notable, perhaps, are the media mixes within markets and how even close neighbors can show drastically different patterns of media consumption.

Traditional media channels used in the last week

Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?



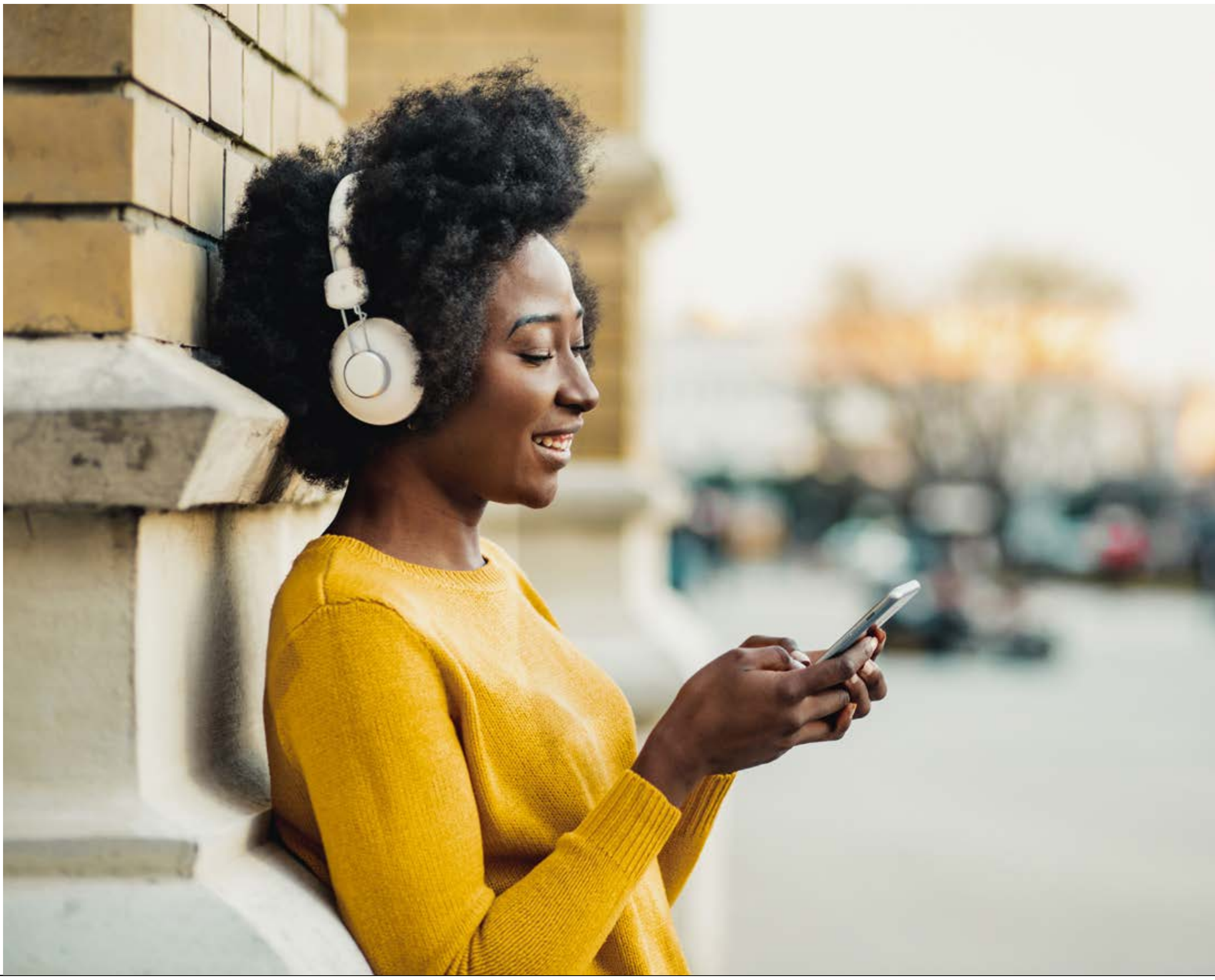
Our data shows that when global consumers are asked about the kinds of traditional media they have used in the past week, live TV still dominates other formats. Across most of the 17 markets, over half of respondents consumed it – with the only exceptions being the UAE, Singapore, and China.

And while The Buggles may have pronounced its death in 1979, in 2020, live radio is now the second most commonly consumed traditional media format.

Print sits in the middle of the international pack and is particularly popular in India – where 46% of our nationally urban representative sample read a newspaper in the week prior to being asked the question. It is a similar situation in Sweden, where 44% of people picked up a copy of Dagens Nyheter, Svenska Dagbladet, or a similar publication.

Following 2019 – when traditional media companies consolidated (such as Disney's acquisition of 21st Century Fox) and launched their own streaming services in an attempt to compete with technology-based providers – 2020 was expected to be a significant year for digital media.

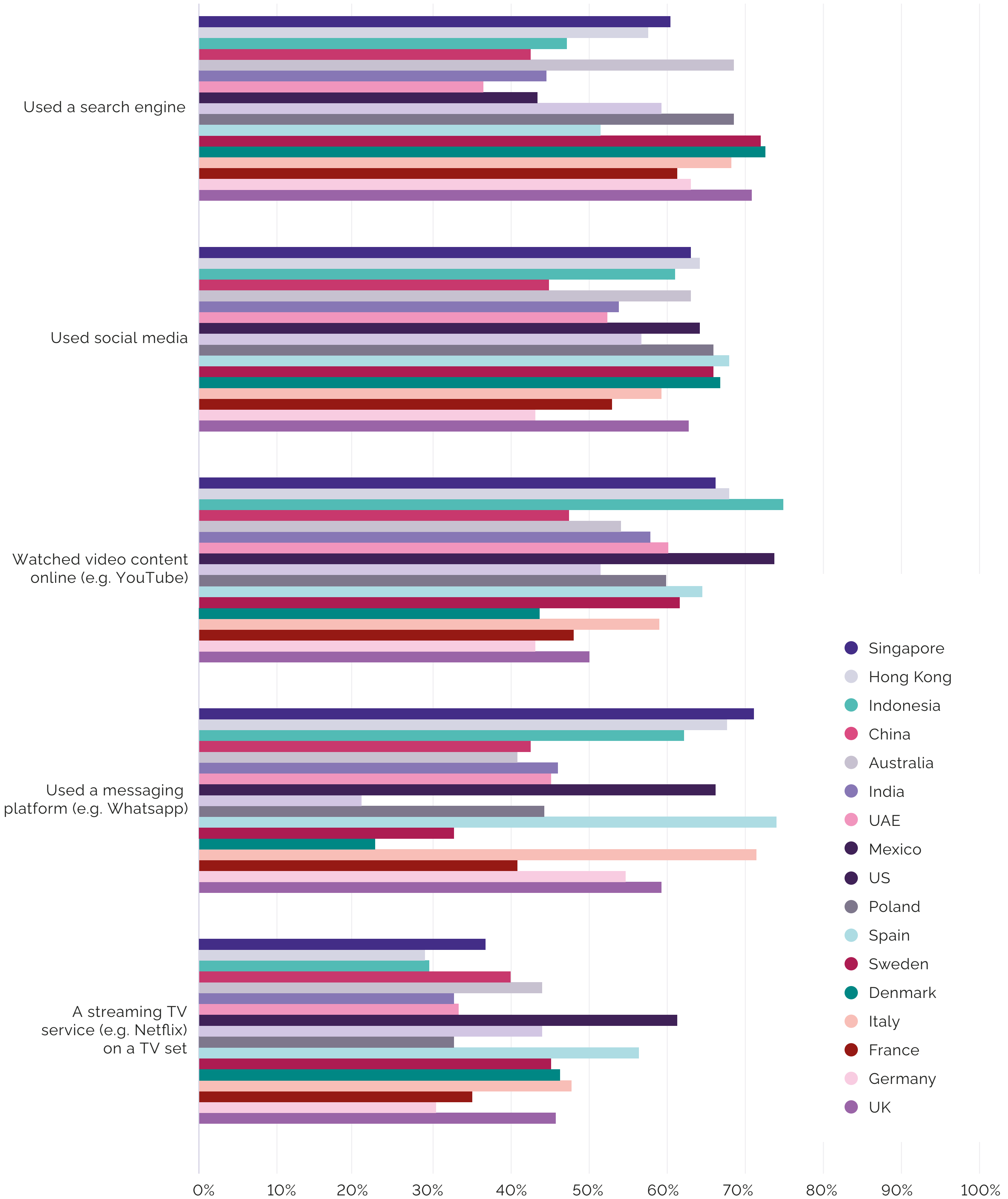
COVID-19 brought this into sharp focus, but perhaps not in the way many expected. With a pandemic keeping more people indoors than ever before, digital media occupied a place of major importance as a means of keeping the public informed more rapidly than they might have been via traditional media. It also provided entertainment at a time when some traditional forms were unavailable.



The most widely used digital media channels

Digital media channels used in the last week

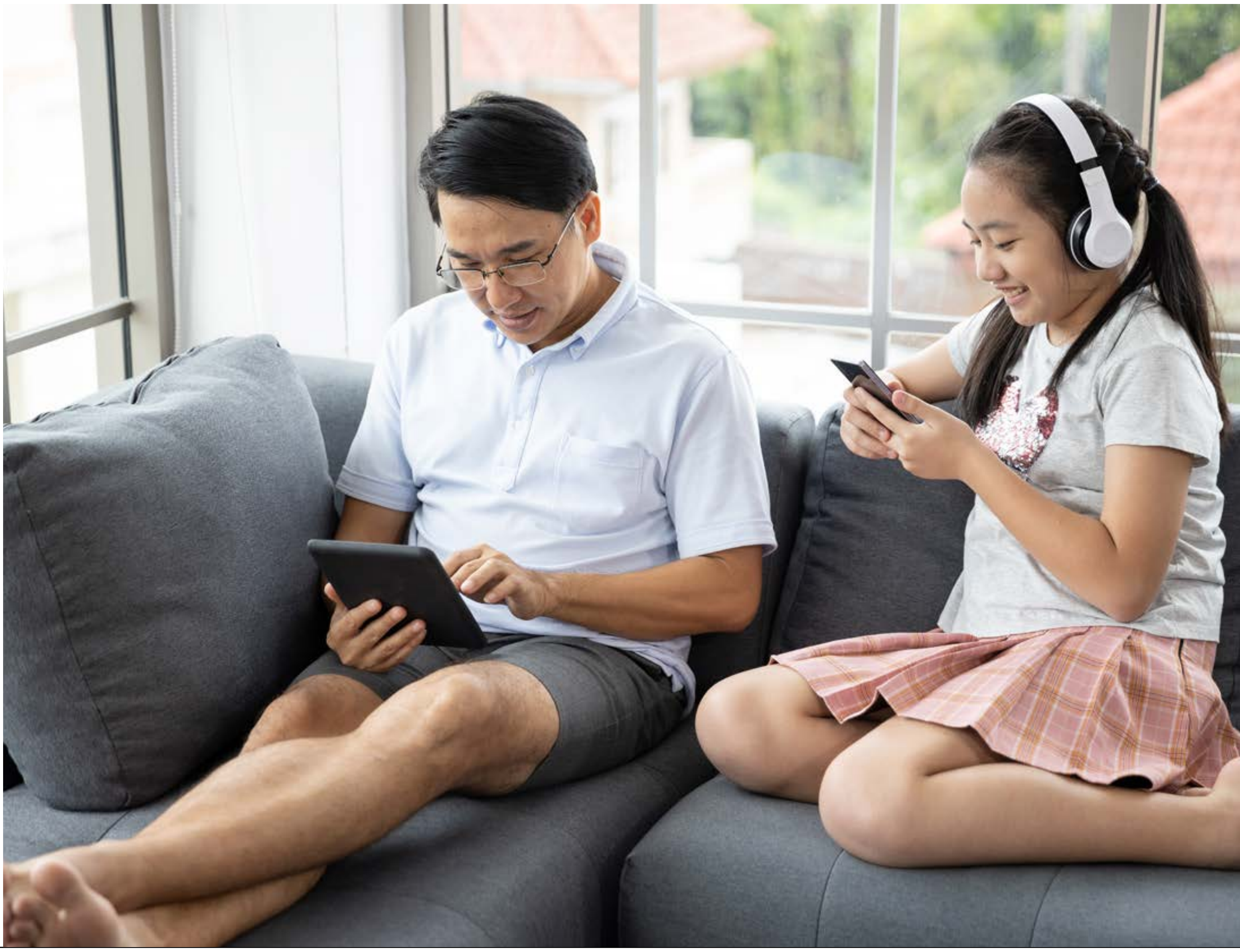
Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?



When asked what they'd done in the past week, a majority of respondents in most markets said they'd used a search engine, logged on to social media, or seen video content online. Large proportions also said they'd communicated via messaging services, viewed content-streaming platforms, or watched live TV on their phone, tablet, or computer.

The key takeaway from this data is that even the less popular digital activities are now fairly commonplace. Putting messaging services to one side, the lowest number for these types of consumption in any of the markets is in Hong Kong – for streaming on a TV set. And even then, almost three in ten (29%) people did so in the week prior to being asked. This low-water mark is still higher than the global average for watching recorded TV, reading a print newspaper, or a print magazine.

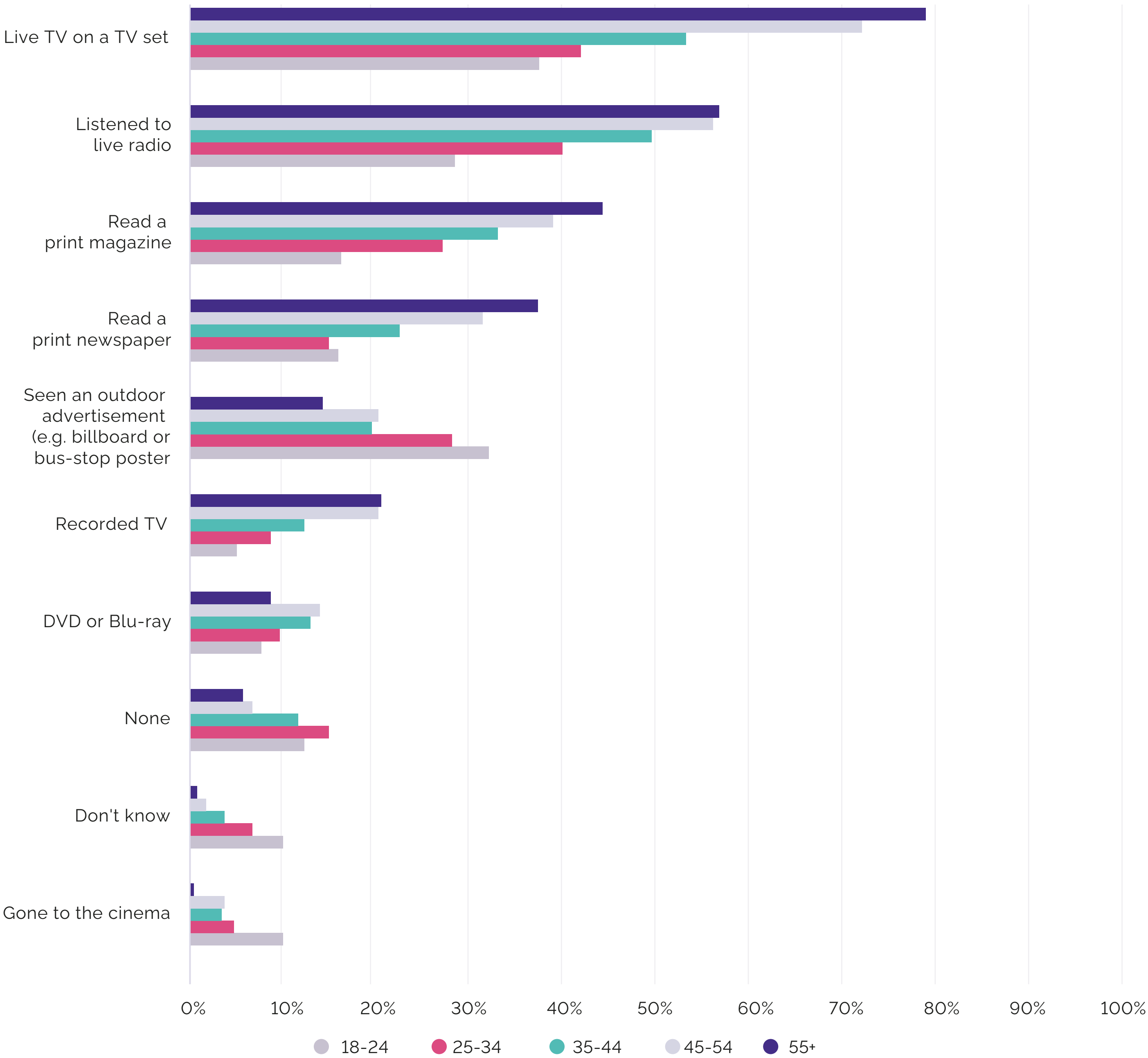
As mentioned earlier, it is not sensible to make assumptions about one country based on the experience of a close neighbor: all markets have nuances. In the UK, 17% of the population have watched live TV on a phone, tablet or computer in the previous week. In France, that figure was 29%. Only 7% of Danes listened to catch-up or on-demand radio in the previous week, compared to nearly three times as many Swedes (19%) on the other side of the Øresund Bridge.



Media market profile: Germany

German traditional media consumption by age

Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?



Germany's traditional channels may speak to the evolving nature of its media industry.

True to certain stereotypes, print media is more likely to be consumed by the older (45-54 and 55+) groups of German consumers – as is live radio and live TV.

Younger Germans are more likely than their older compatriots to consume traditional media through out of home channels such as posters/billboards and the cinema. The older groups' reluctance to visit the cinema could partially be attributed to the COVID-19 crisis, with the over-55 category being likely to contain a higher number of clinically vulnerable respondents than the younger categories.

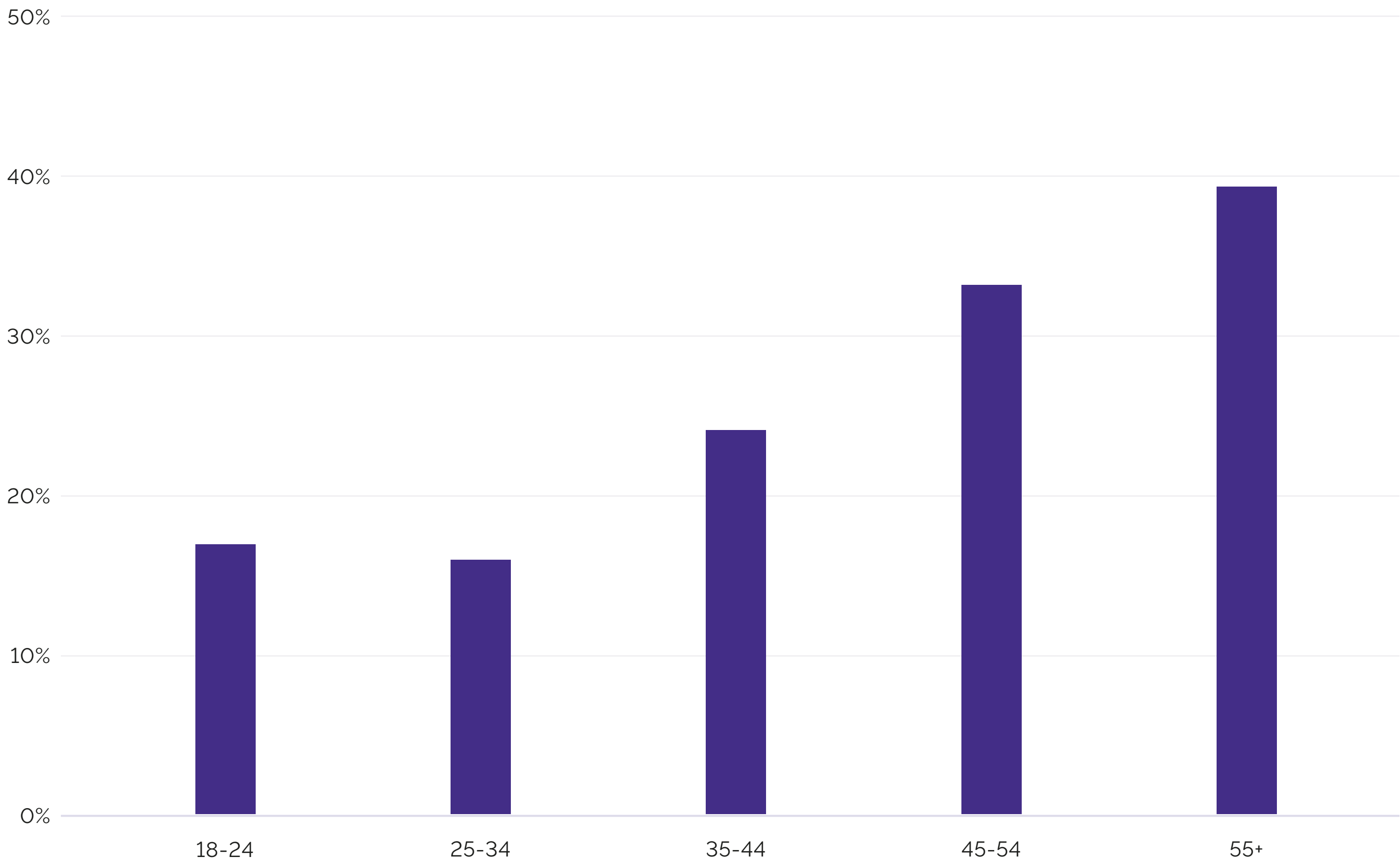
Germany's print newspaper readers are worth reaching

In an example of why scratching the surface of a media consumer profile is important, German newspaper readers show some distinct features – not least their wealth.

As mentioned, Germany's print readership skews older. Almost four in ten (38%) people over 55 read print news, as do a third (32%) of those aged 45-54. Just 16% of 18-24-year-olds and 15% of 25-34-year-olds read print news.

German's in each age group that have read a print newspaper (%)

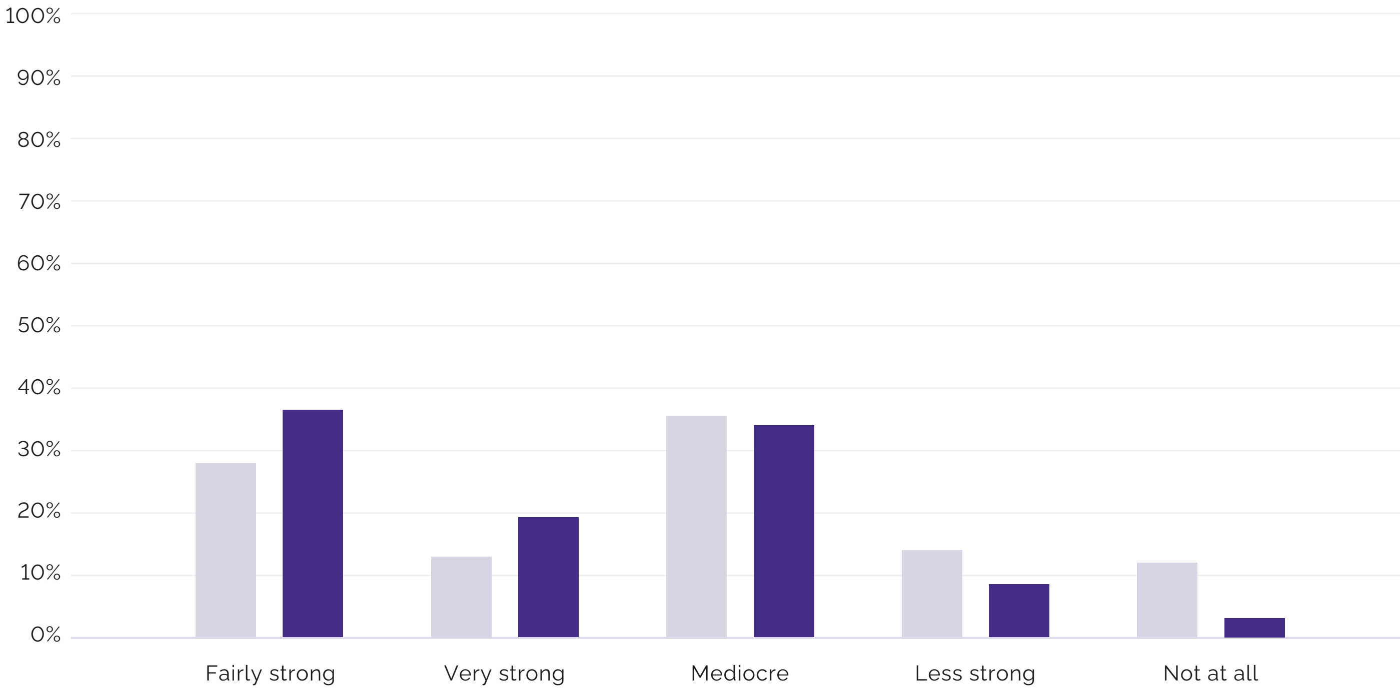
Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?



The average reader is more likely to be married and the parent of a child older than 18. In terms of income, they're also more affluent than the general public. Newspaper readers also tend to have a stronger political interest than most Germans.

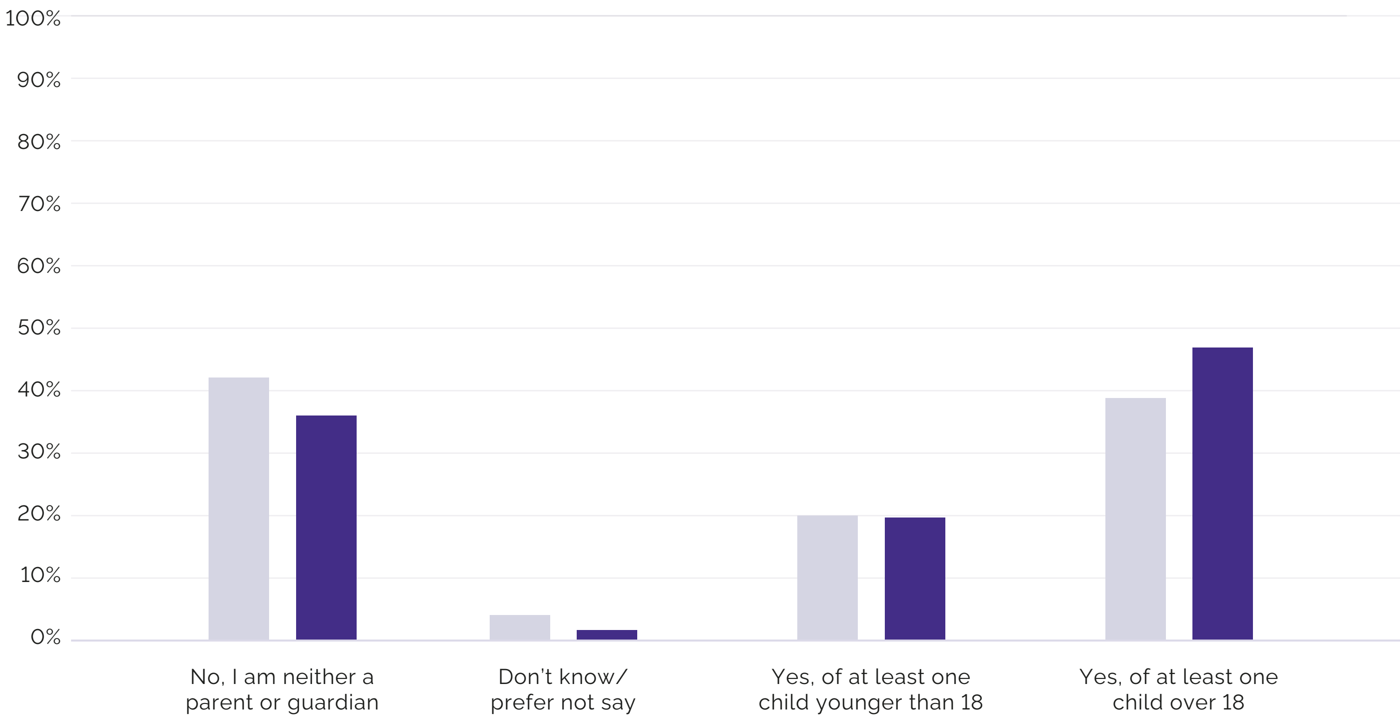
German print news readers   Nat rep

German newspaper readers' political interest



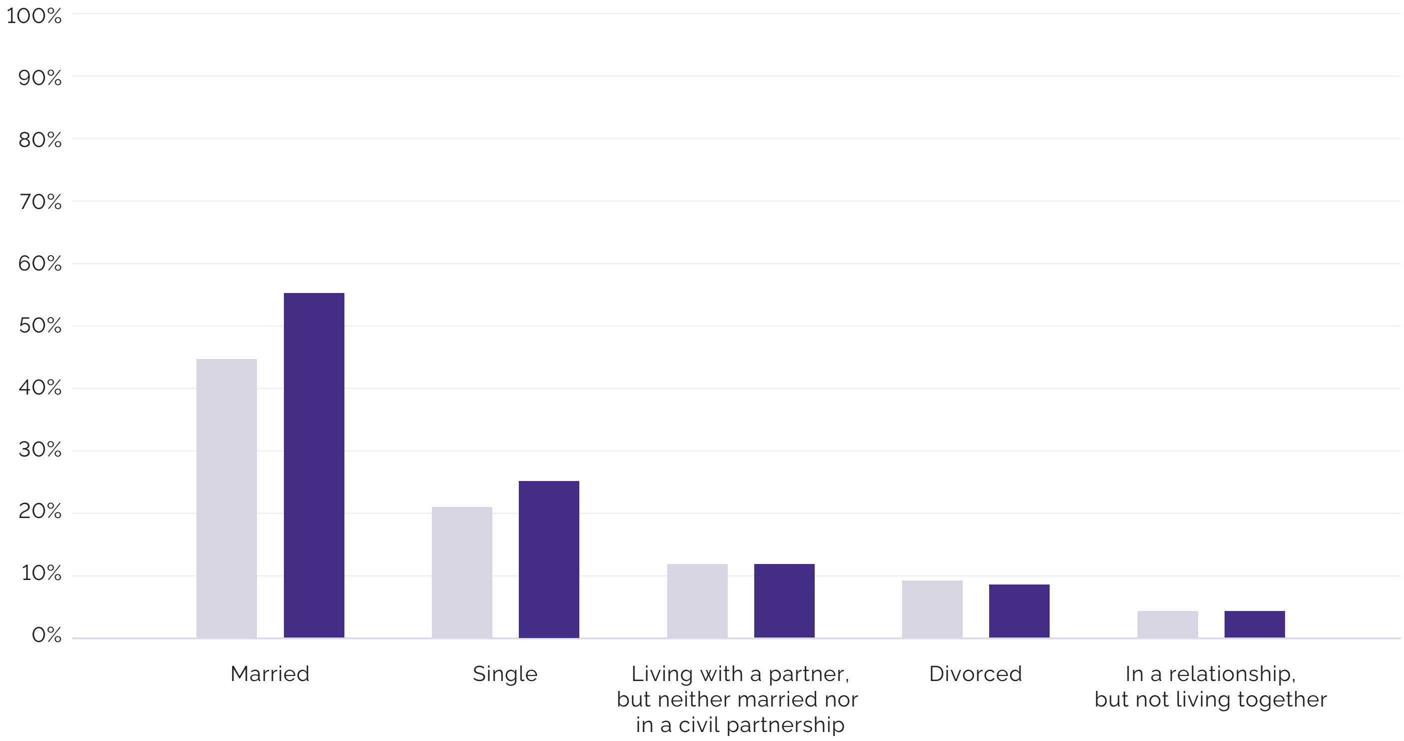
Just under half of German print newspaper readers have grown up children

Are you a parent or guardian? Please select all that apply



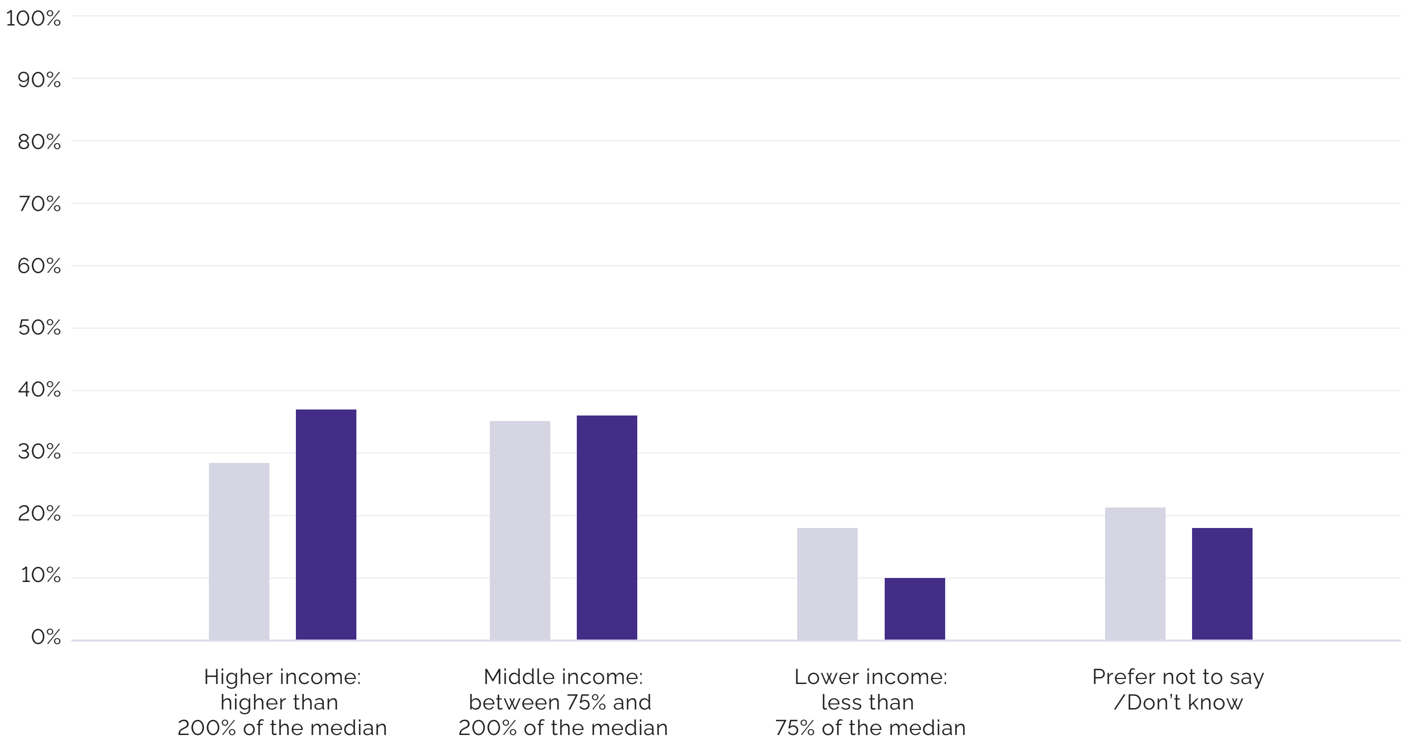
Majority of German print newspaper readers are married

What is your current marital or relationship status?



German print newspaper readers have a higher than average income

This variable is derived from income, and uses the median national income to create the responses:

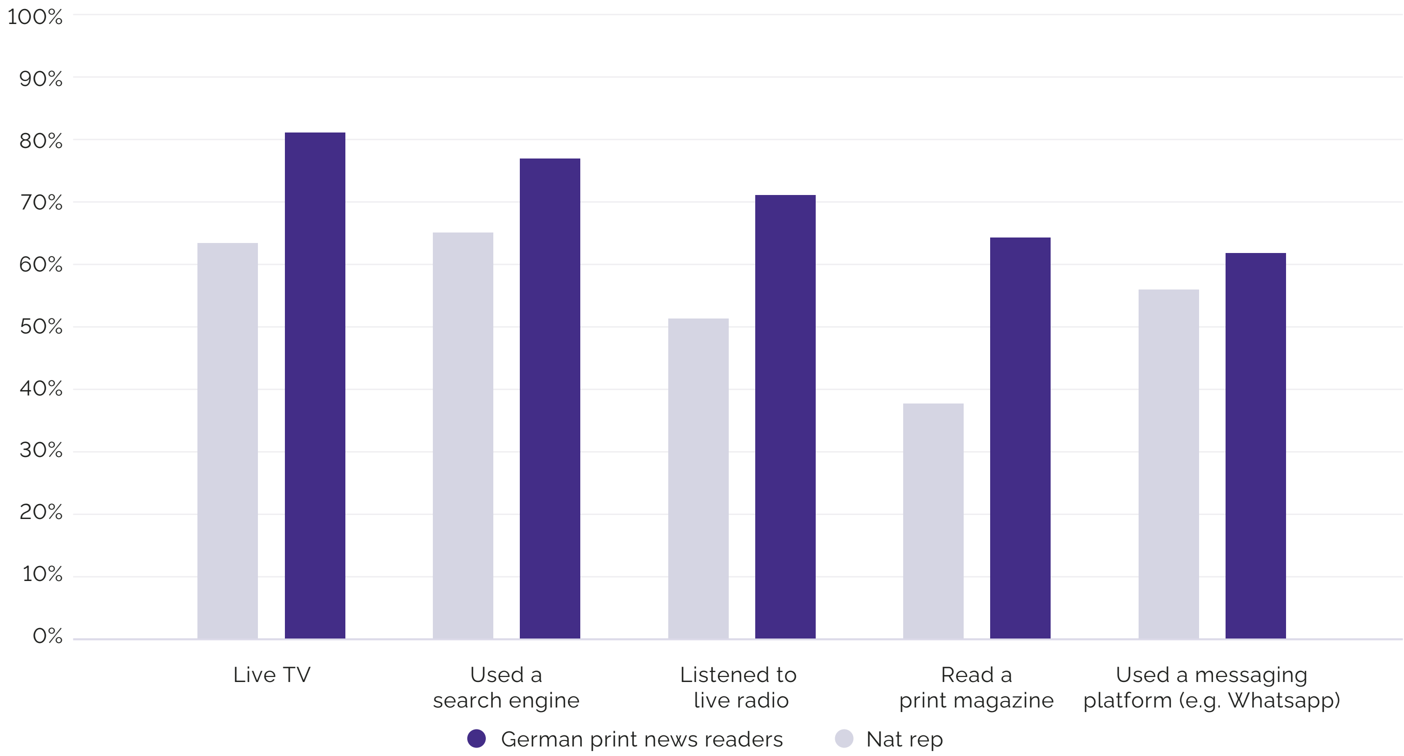


Read all about it: How do German print readers consume news?

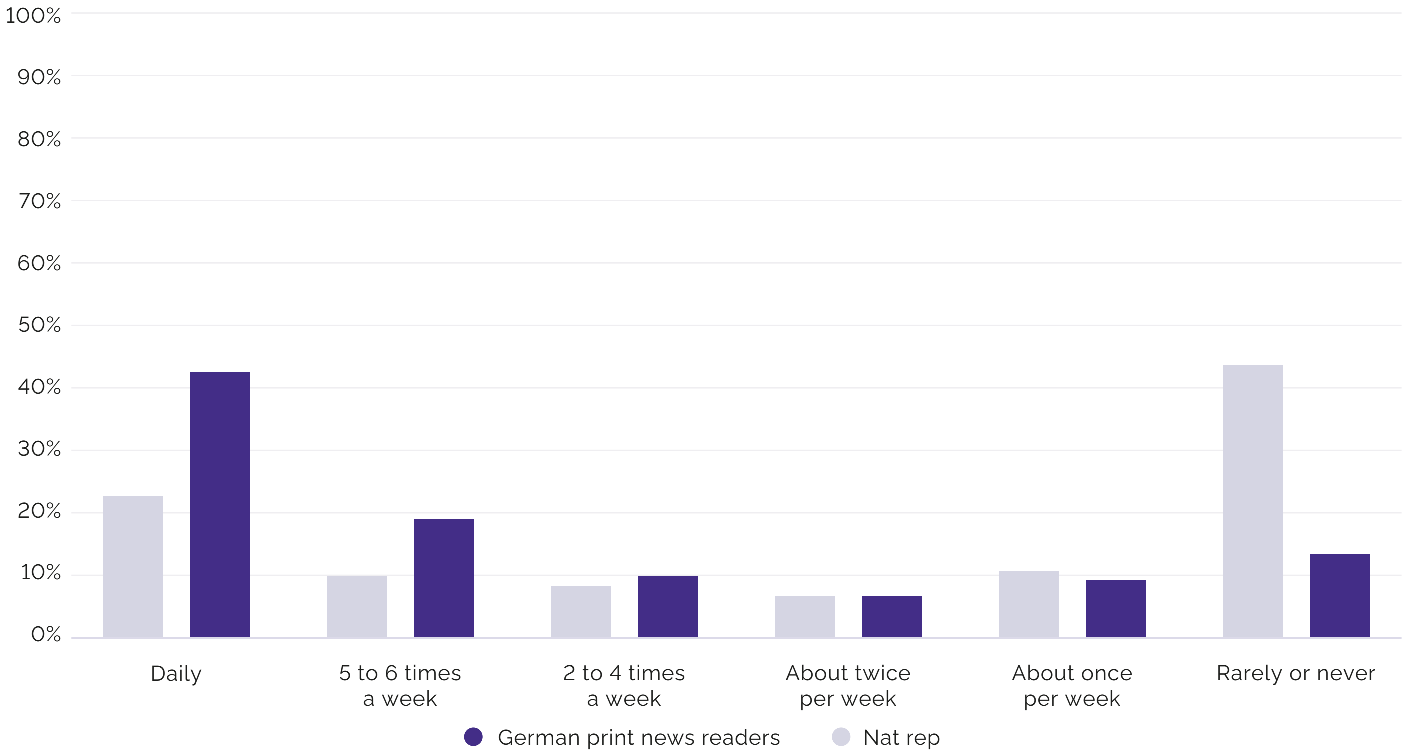
Among the difficulties facing newspapers around the world is competition with other channels and formats. In Germany, this difficulty is neatly illustrated by the fact that TV is a more popular channel among print news consumers than newspapers themselves.

German print newspaper readers are also exposed to...

Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?



German newspaper readers' typical frequency of reading a newspaper



In Germany, if you are a reader of print, you are also more easily reached elsewhere as well. For example, print readers are more likely to watch live TV, listen to live radio, or use a search engine than the German public. They're also more likely to read print magazines, too.

As for the regularity of their readership, more than four in ten (43%) consume print news daily. Nearly a fifth (18%) read the paper five or six times per week. Some 23% have a subscription to their newspaper.

Beyond frequency, where in print is the most valuable spot to place an ad? German print news consumers are most likely to read:

- National news (71%)
- Local news (70%)
- News from Europe (63%)
- International news (60%)
- News from North America/USA (37%)

In 2020, the interest in American news could have been driven by the events of the country's presidential election – a national event in the US, but one often considered to have international implications.

Which streaming services or TV channels are German newspaper readers most likely to consider?

As for specific channels and services, German readers are particularly likely to consider watching channels from ARD (a joint organisation of Germany's public-service broadcasters) and are notably more likely to do so than the general public (63% vs. 44% nat rep). ZDF – another public-service broadcaster – comes in second among this group (61% vs. 45% nat rep), while ARD's streaming service, Mediathek, rounds out the top three (54% vs. 37% nat rep).

Streaming services or TV channels considered	German print news readers	Nat Rep
ARD	63%	44%
ARD Mediathek	54%	37%
ZDF	61%	45%
ZDF nero	47%	33%

Media market profile: France

A look at the French market reveals that, while younger consumers are generally more likely to have used digital media in the week before being asked, age differences are less pronounced than they are with regard to traditional media.

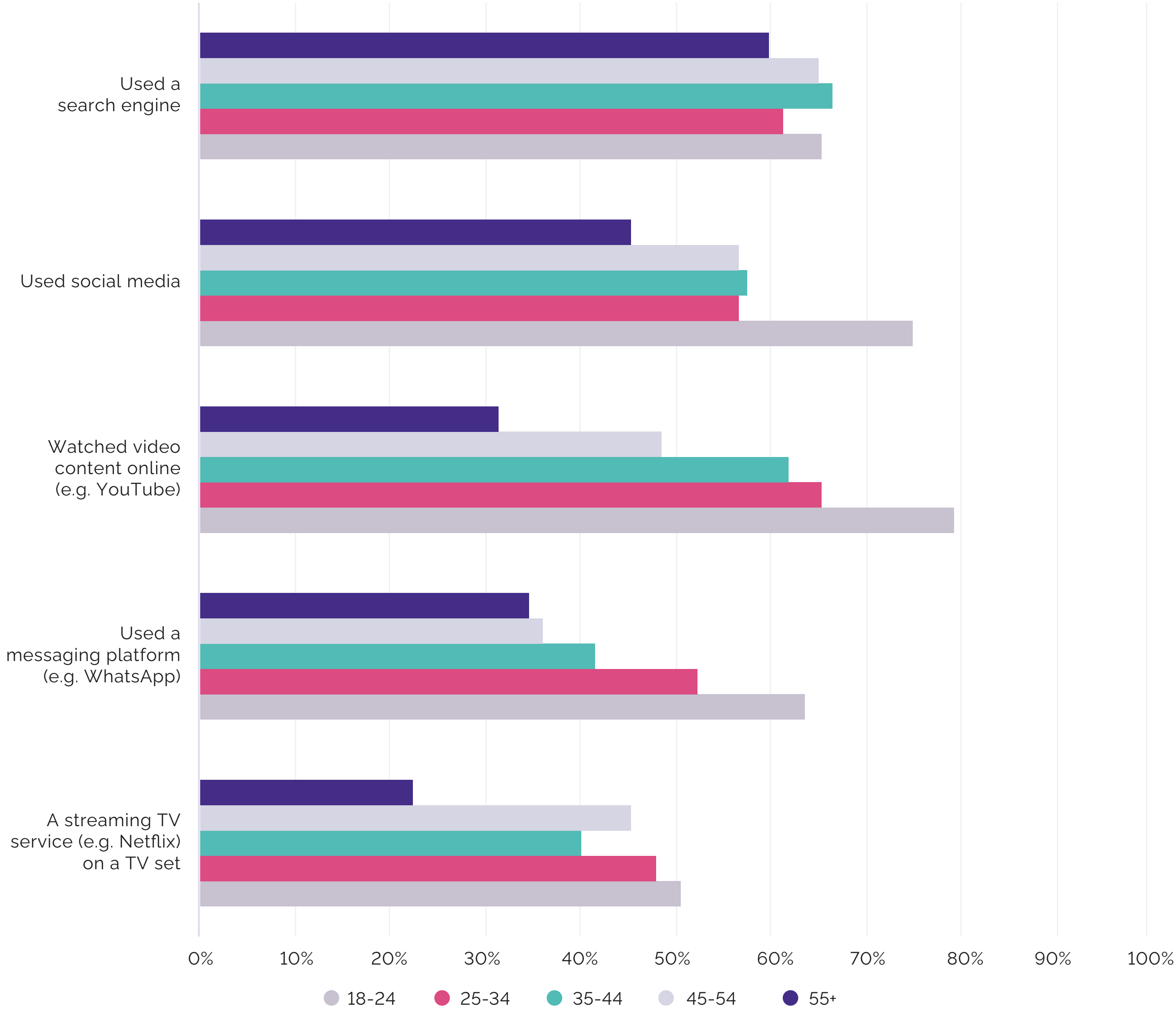
Though there's a clear skew towards younger groups when it comes to watching online video content, viewing adverts in web browsers, or using a messaging platform such as WhatsApp, the difference is less meaningful in other areas.

For example, all groups are about as likely to use a search engine, and every group - except those aged 55 and over - has a similar propensity to read blogs, watch vlogs, log on to social media or listen to a podcast.

Media channels French consumers have recently engaged with

France age breakdown

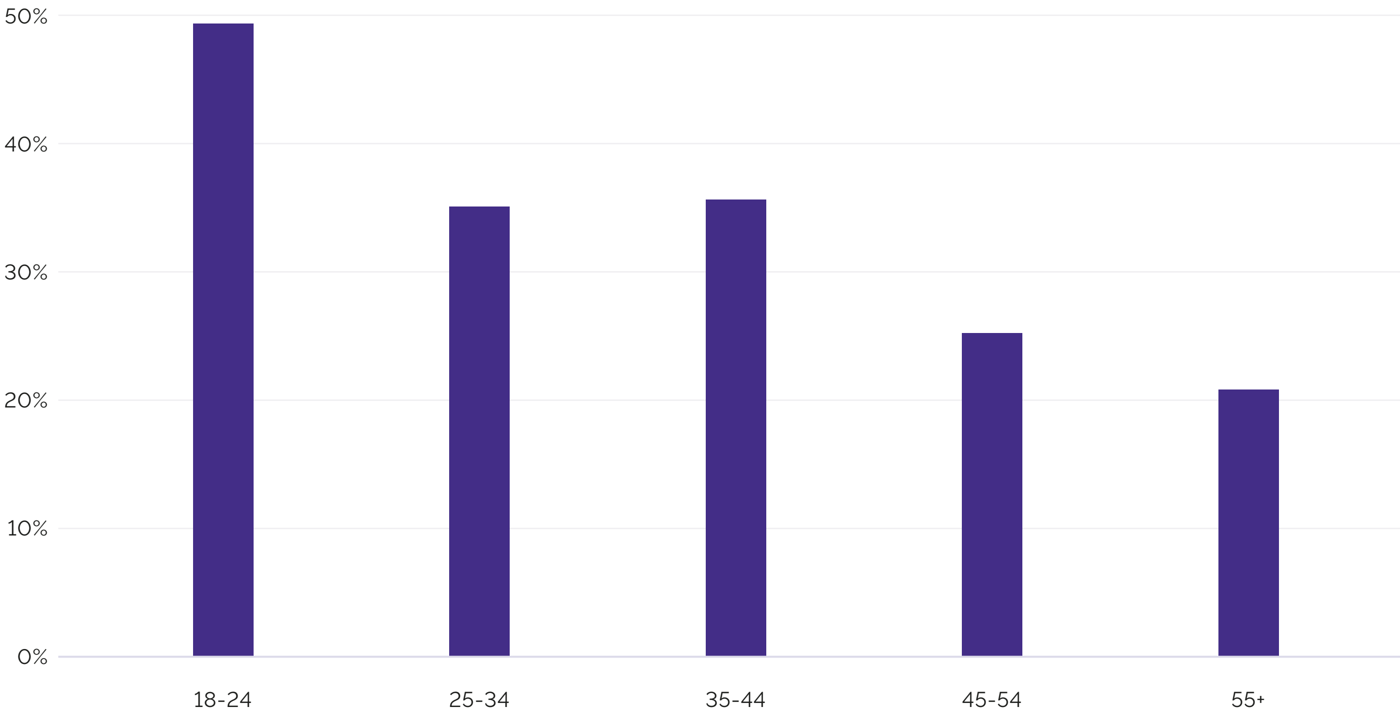
Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?



TV without TV: Who watches streaming content in France – without a television set?

Our data indicates that the younger the consumer, the more likely they are to watch TV content without a television. Almost half (48%) of those aged 18-24 say they've recently viewed content on a smartphone, tablet or PC compared to just a fifth (21%) of those aged 55 and over and a quarter (26%) of those in the 45-54 age bracket.

French consumers within each age group that watched on-demand, catch-up or streaming service on a phone, tablet or computer (%)
Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?



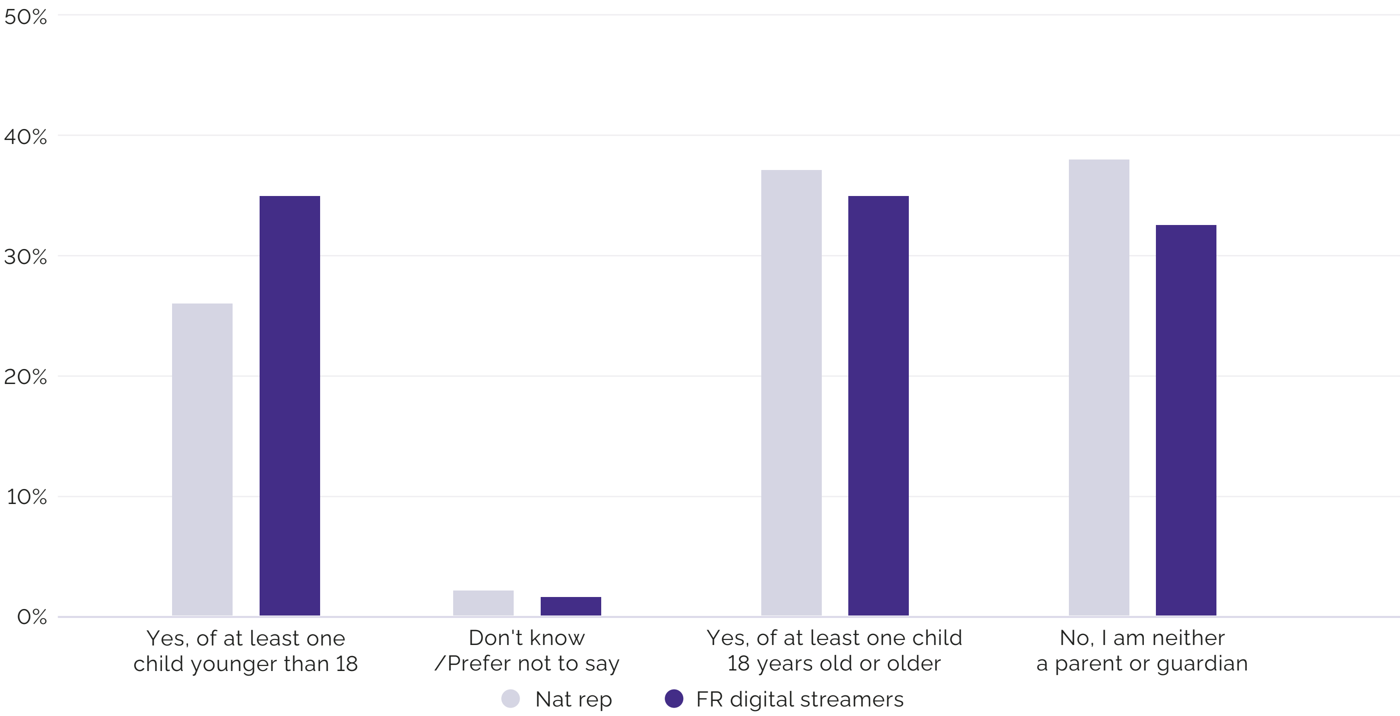
This does not necessarily point to a broader trend. Three-quarters (77%) of those who watch digital content also say they watch live TV. Similarly, more than six in ten (63%) also say they favor another "traditional" channel – live radio.

So even for the consumer group most likely to favor alternatives to the traditional viewing experience, live TV and radio still holds an appeal and complements the digital experience.

Many digital streamers may be watching streaming, on-demand or catch-up content on their devices with their children or even perhaps because the main TV set is otherwise occupied. Our data shows that the parents of children younger than 18 are more likely to use a PC, tablet, or smartphone for their entertainment needs.

In terms of overall attitudes, digital streamers are more likely to agree that streaming has changed TV (51% vs. 34% nat rep). Media buyers may also note that they hold stronger opinions on marketing: a quarter (26%) say advertisements outside their homes affect how they see a brand (compared to 15% of the French public) and around the same proportion (27%) say they wish they could see more advertisements with a family like theirs.

France: Digital streamers are more likely to be parents of children under 18
Are you a parent or guardian? Please select all that apply



PAID SUBSCRIPTIONS

Subscriptions have fundamentally altered global business. Consumers around the world are subscribing to clothes, food, video games, and a range of other necessities and conveniences. Companies such as Microsoft or Adobe – which used to charge a one-off fee for software licences – now earn much of their revenue through pay-monthly models.

But the impact on media has been especially profound. Netflix is perhaps the most obvious example of this phenomenon – with consumers paying a flat monthly fee for an ad-free experience as the platform spends record amounts on new content designed to appeal to as many demographics as possible.

"Legacy" media institutions have turned to paywall-based business models for their web offerings in an attempt to recoup dwindling print and advertising revenues and outlets like *The Times* in the UK and *The New York Times* have had some success.

However valuable the move towards subscription-based payment structures has been, it is worth exploring how viewers and readers feel about it: whether they prefer to pay with their wallets or their attention.

To that end, this chapter focuses on the global paid subscription ecosystem.


Action / Comedy / Thriller
Checkmate
Action/Thriller
Attorney
Medical
Guitar
Gambling
Deep Ocean
The Pills

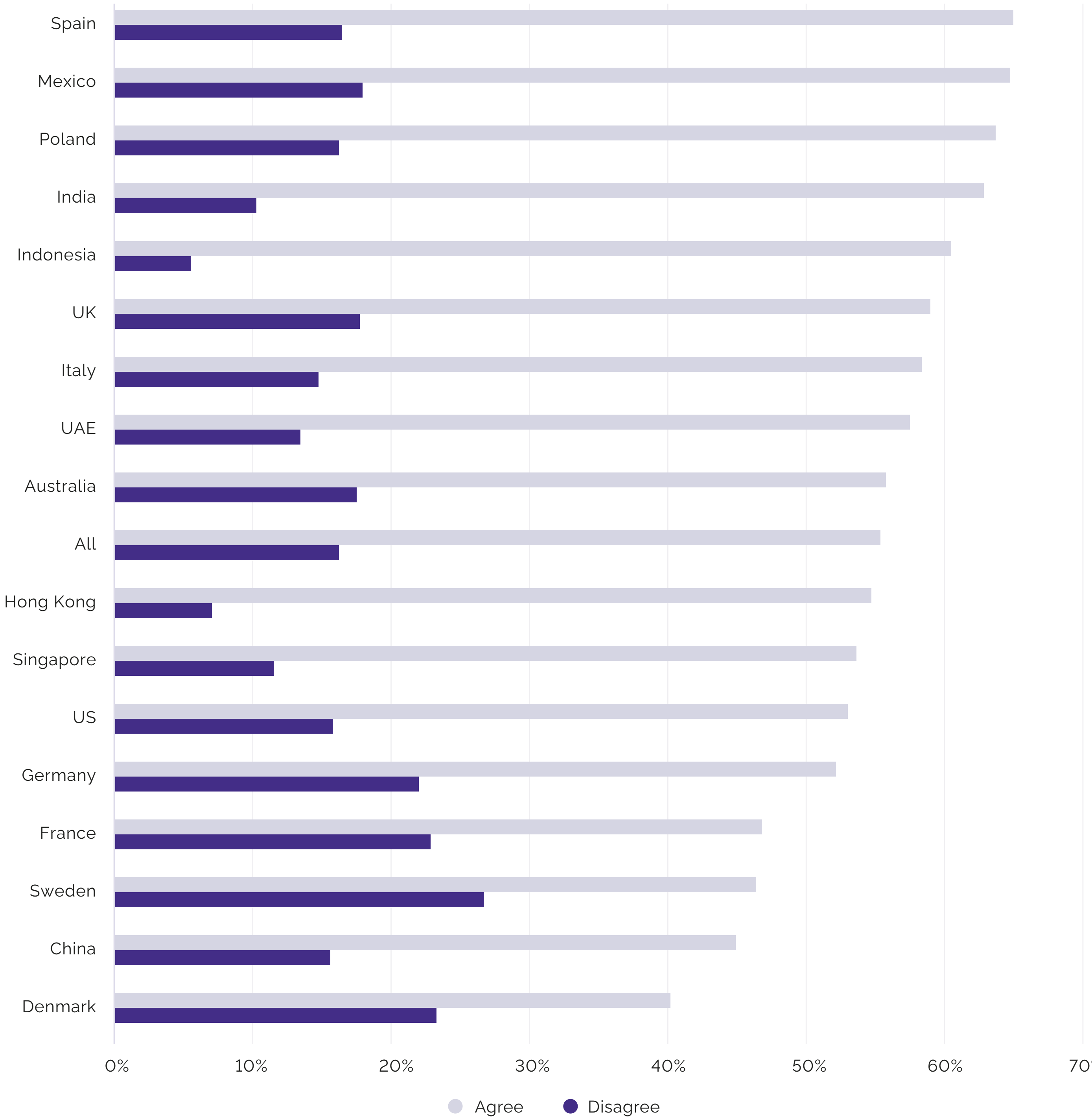
Most global consumers agree that it's fair to watch ads in exchange for free content

There is a common perception that advertising is a pain point for consumers, and there is a certain logic to that assumption. Much international broadcast TV, for example, is structured around creating tense or exciting moments – and immediately cutting to a commercial break.

Yet consumers do not necessarily see ads as a problem. Our data shows that, when asked, most consider the bargain between consumers and advertisers – that people watch promotions in exchange for free content – to be essentially fair.

The majority of people think it's fair to watch ads in exchange for free content by country

I think it's fair that we have to watch ads in exchange for free content

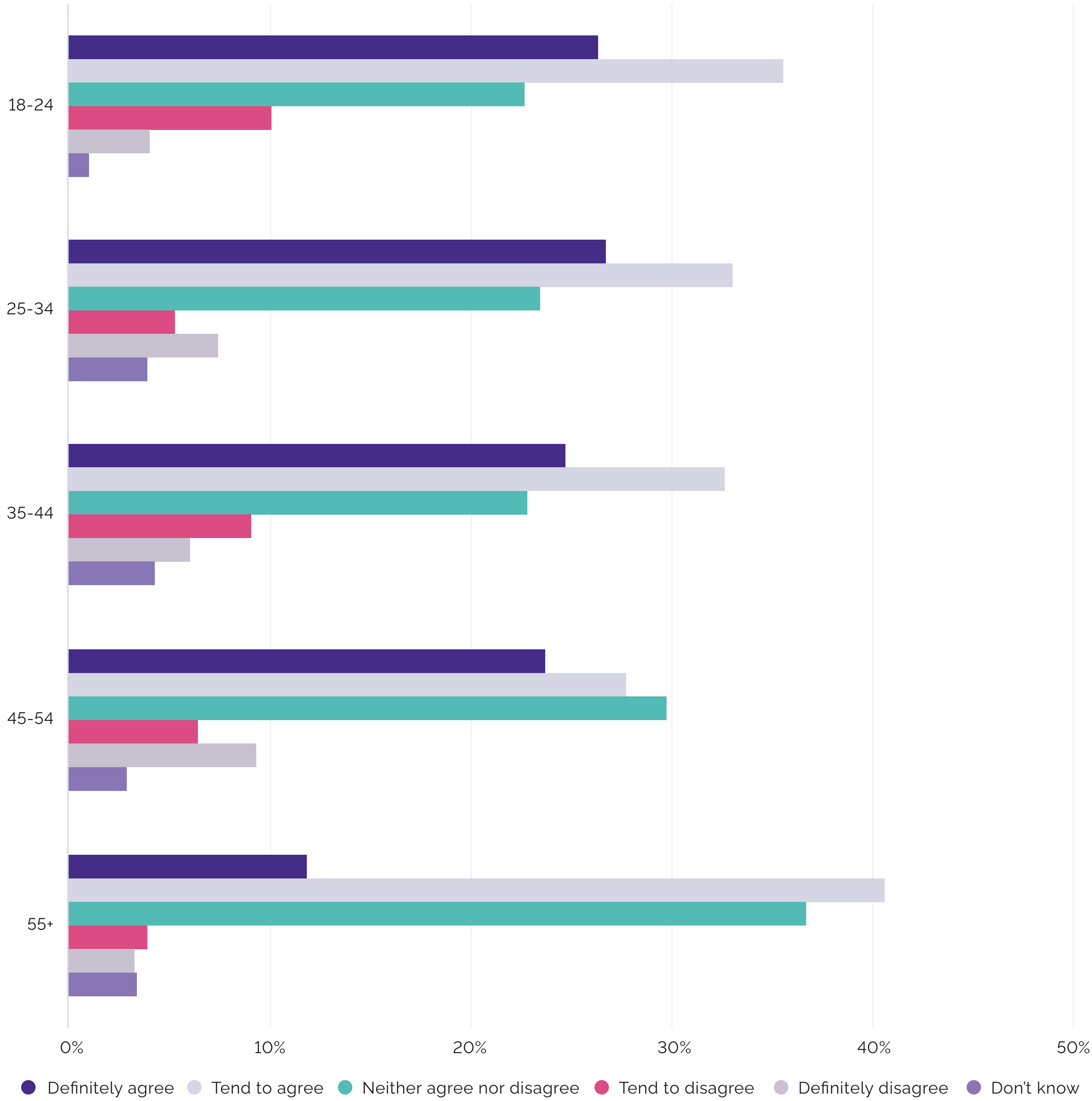


In every country featured in our study, this proposition is supported by a plurality of consumers, and in all but France (47%), Sweden (47%), China (45%), and Denmark (40%) it is supported by a majority. The two Scandinavian countries we surveyed are most likely to dissent, but even in these markets, only around a quarter (27% Sweden; 23% Denmark) consider watching advertising in exchange for free content to be unfair.

Looking at the UAE shows that this trend is similar across age groups: in every category more people agree than disagree that the bargain is fair.

UAE: People that think it's fair to watch ads in exchange for free content

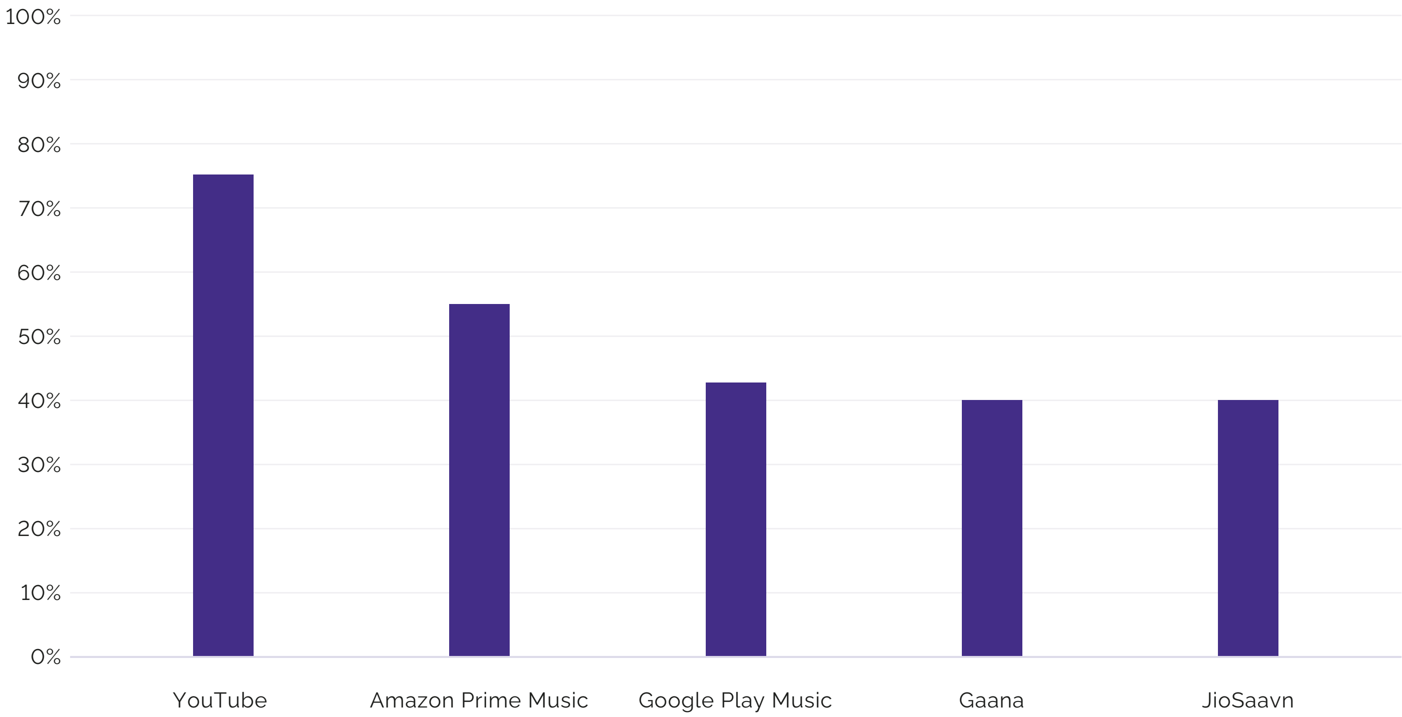
I think it's fair that we have to watch ads in exchange for free content



A third of Indians in urban areas subscribe to music streaming services

Digging deeper into one of our markets, one third (33%) of Indians in urban areas are signed up to a music subscription service such as Amazon Prime Music.

Indian music subscribers most over-index in being regular watchers of...
Which, if any, of the following online music services do you currently use either on a free or paid-for subscription? Please select all that apply.



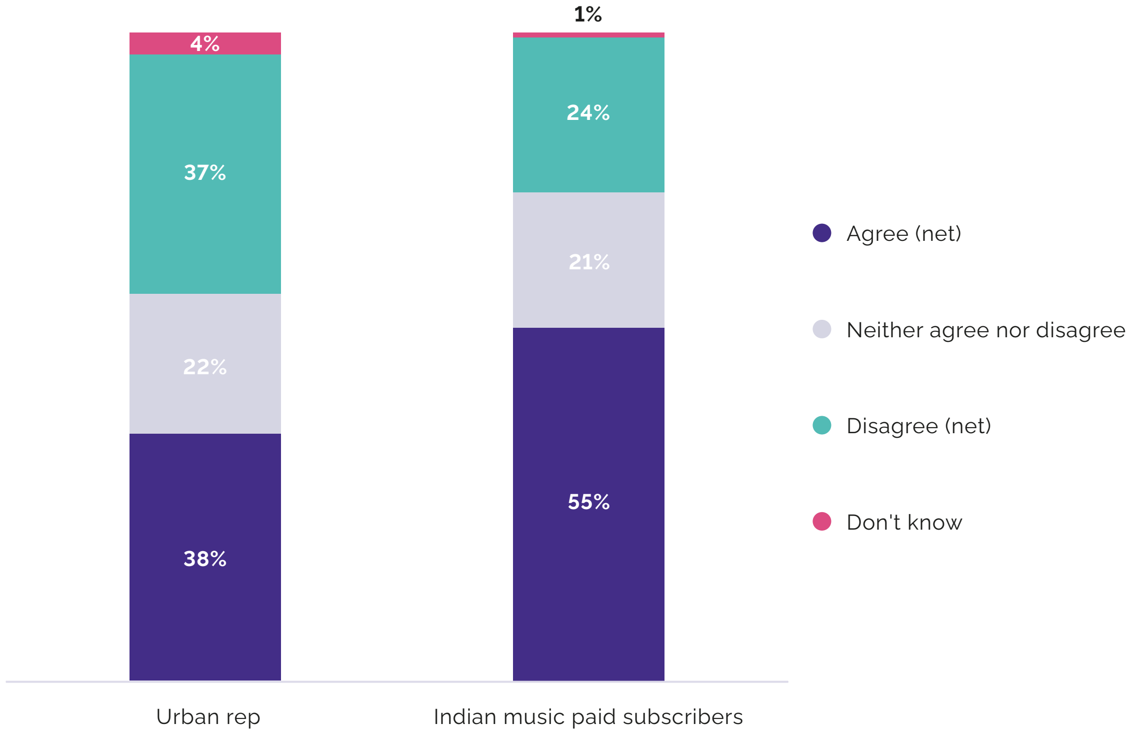
The favored service amongst this group is YouTube – the company offers both a free and a paid tier – which three-quarters (75%) use to listen to music. Amazon Prime Music is a distant second, though it is still used by a majority of this group (55%). The following three brands are closer together, with 42% subscribed to Google Play Music and 40% apiece signed up for Gaana and JioSaavn.

There are some key differences between this group of music subscribers and the wider metropolitan population in India.

Our data shows that music subscribers are more likely to take risks with their money (55% vs. 38% urban rep) and more likely to agree that they spend a lot of money on clothes (56% vs. 39% urban rep).

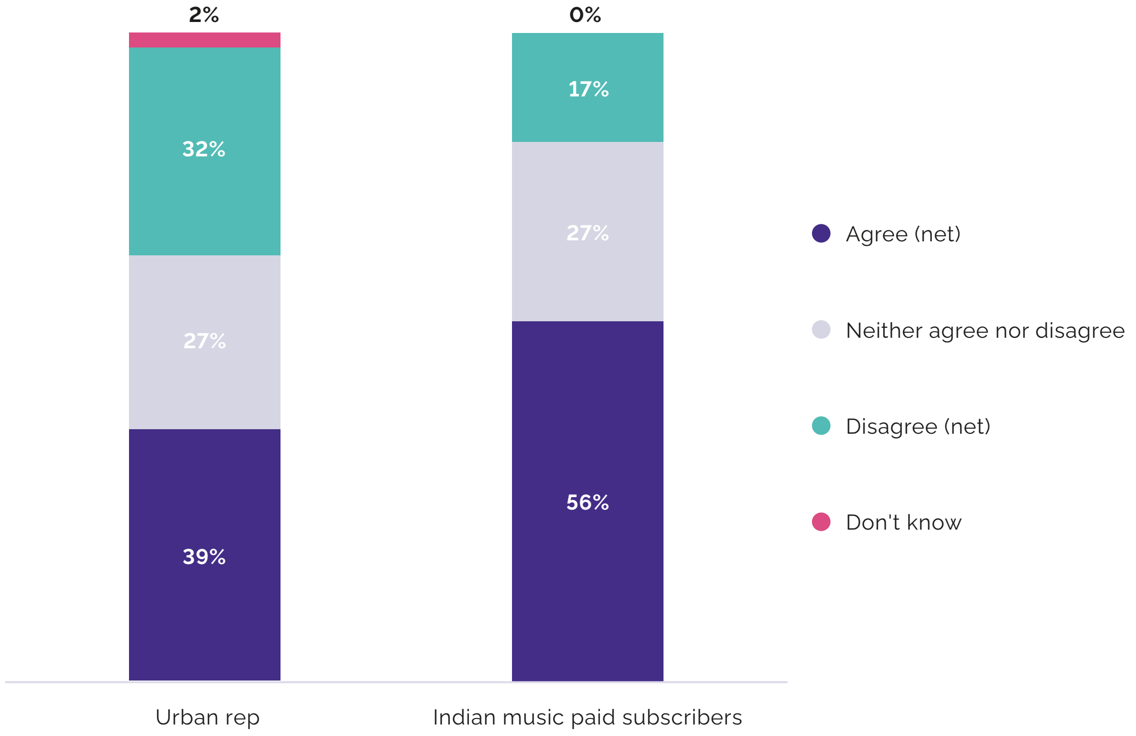
Indian music subscribers are more willing to take risks with their money

To what extent do you agree with "I don't mind taking risks with my money"?



Half of Indian music subscribers spend a lot on clothes

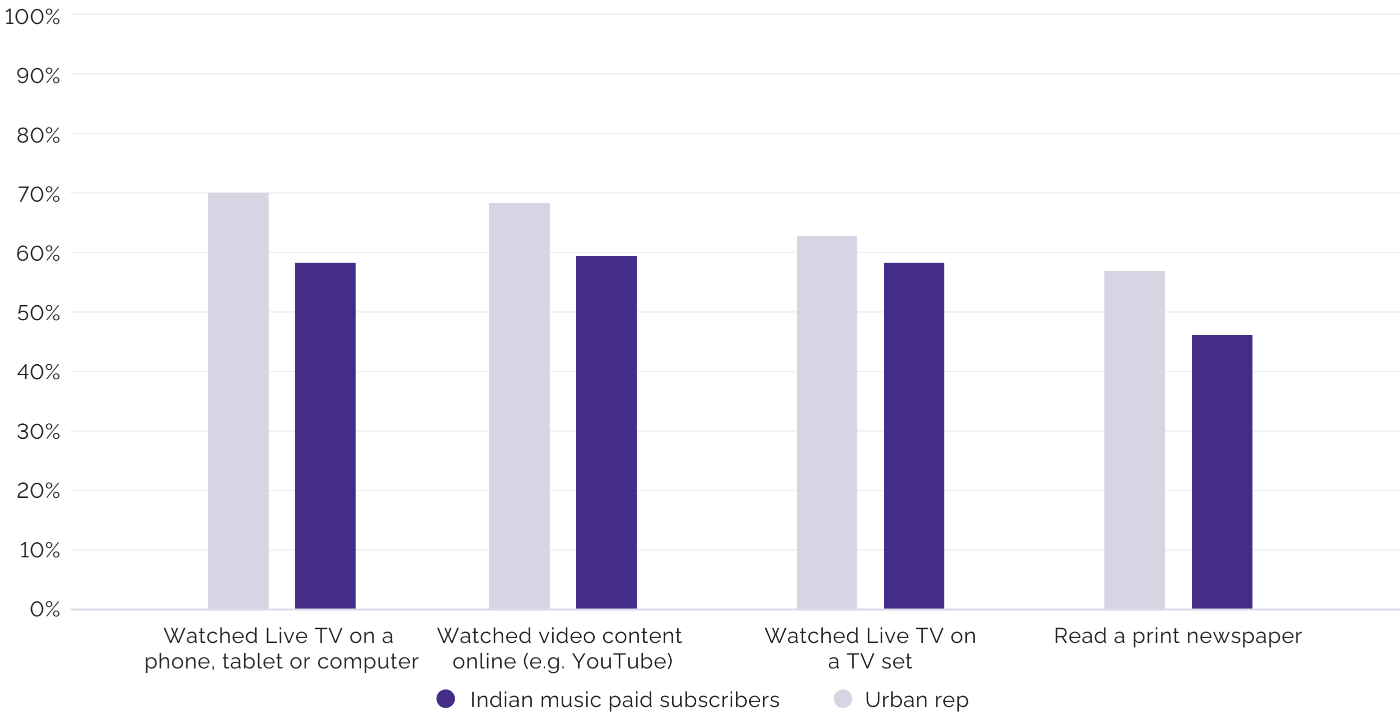
To what extent do you agree with "I spend a lot on clothes"?



In terms of their general media habits, more than half (56%) use the radio for companionship compared to four in ten (40%) of the urban population. This group is also much more likely to have watched live TV on a phone, tablet or computer (70% vs. 57% urban rep) or online video content via a service such as YouTube (67% vs. 59% urban rep).

Indian music subsribers were exposed to these platforms

Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?

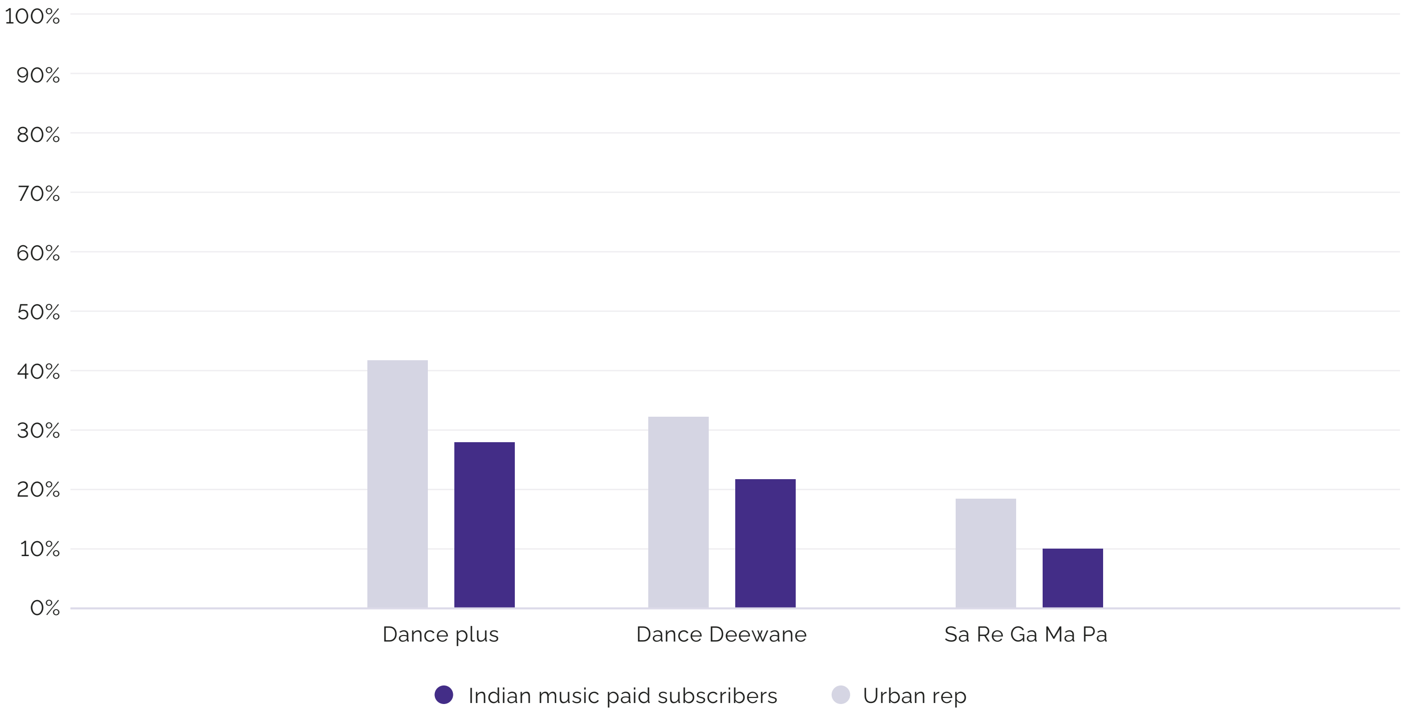


This disparity is not just limited to digital media channels: those who subscribe to a music streaming platform are more likely to watch live TV on a TV set (63% vs. 57% urban rep) and more likely to read a print newspaper (56% vs. 46% urban rep).

When it comes to TV, this group demonstrates a preference for light entertainment. Music subscribers are more likely to be regular viewers of Dance Plus (41% vs. 27% urban rep), Dance Deewane (32% vs. 21% urban rep), and Santoor Sa Re Ga Ma Pa (18% vs. 10% urban rep).

Indian music subscribers most over-index in being regular watchers of...

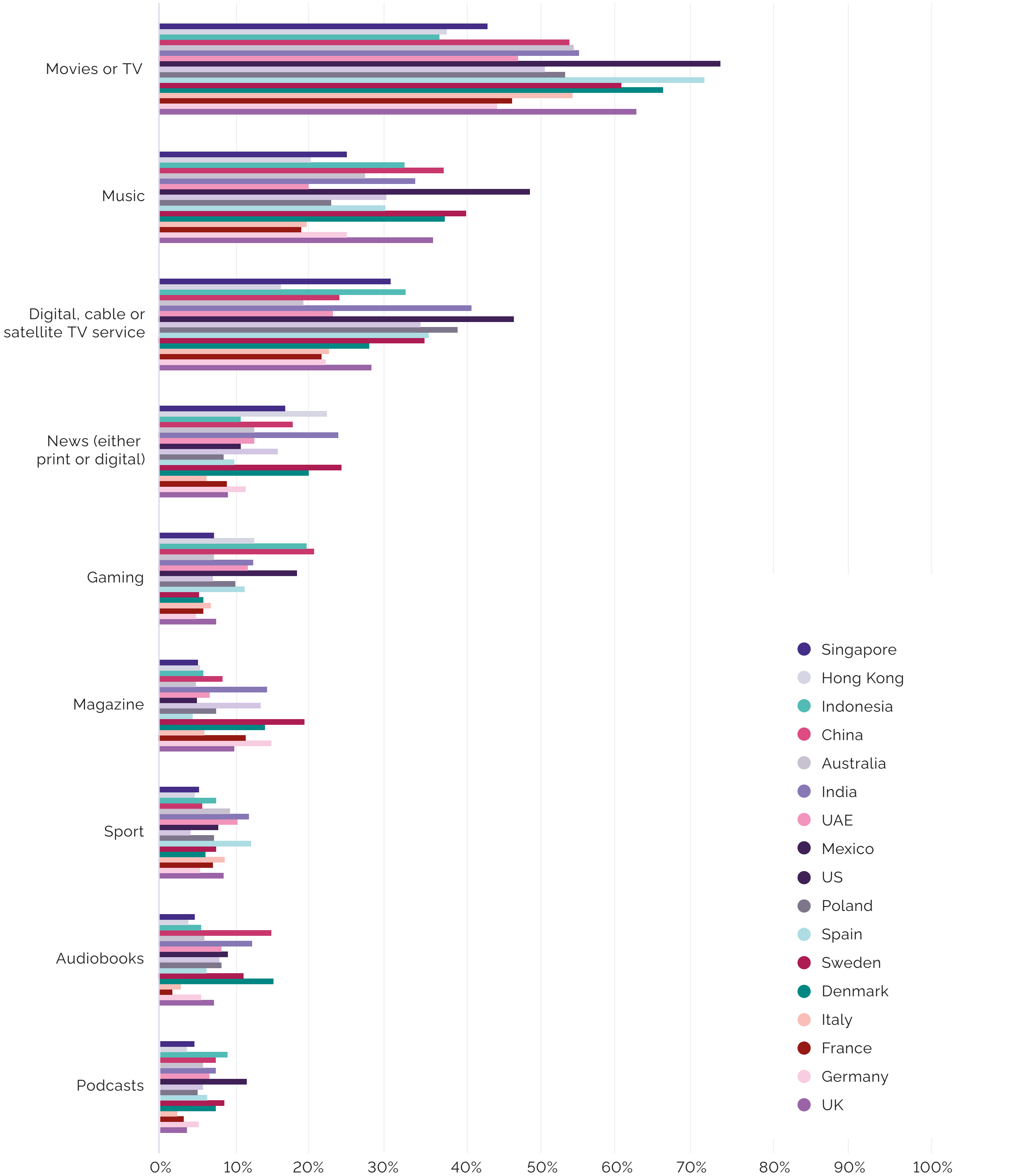
Which of the following TV shows have you watched regularly in the last 12 months? Please select all that apply.



Media subscriptions around the globe

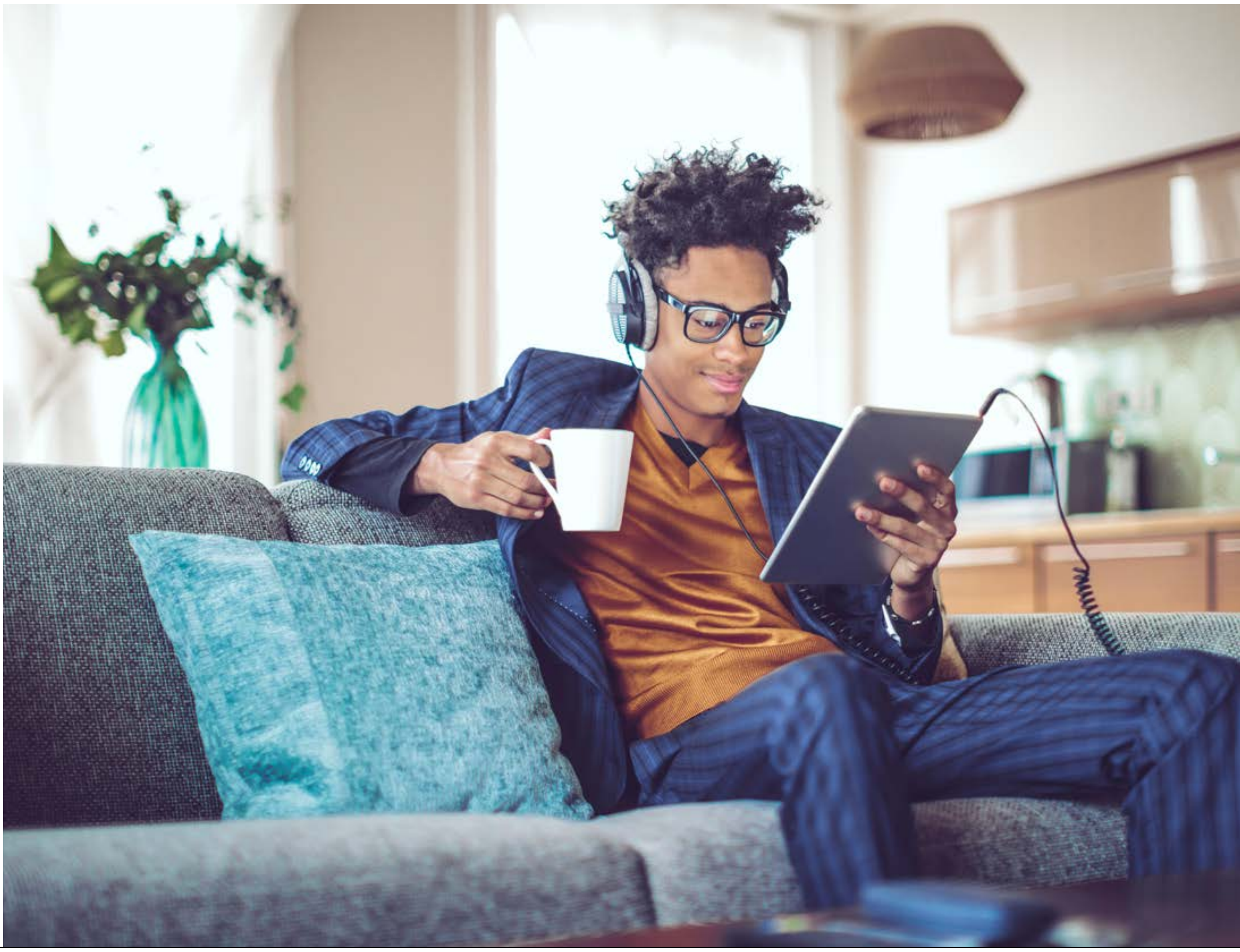
Media: Paid subscriptions

Do you currently have access to a paid subscription for any of the following? Please select each option even if someone else pays the subscription fee



Film and TV subscriptions such as Netflix, AppleTV+ or HBO Max are the most popular by some distance in every market featured in our study and, in most, a majority of consumers has signed up to one. They are particularly popular in Spanish-speaking countries – over seven out of ten adults (71%) in Spain and Mexico (73%) subscribe to one of these platforms. Uptake is also high amongst our Nordic respondents: 66% of Danish respondents and 60% of Swedish respondents have a film or TV subscription.

Music streaming services such as Spotify and digital, cable, or satellite TV subscriptions alternate between second and third place depending on the market. For all these international comparisons, it's worth bearing in mind that in some markets our sample is nationally representative, while in others it is online or urban representative. See the table at the end of the report for more details.

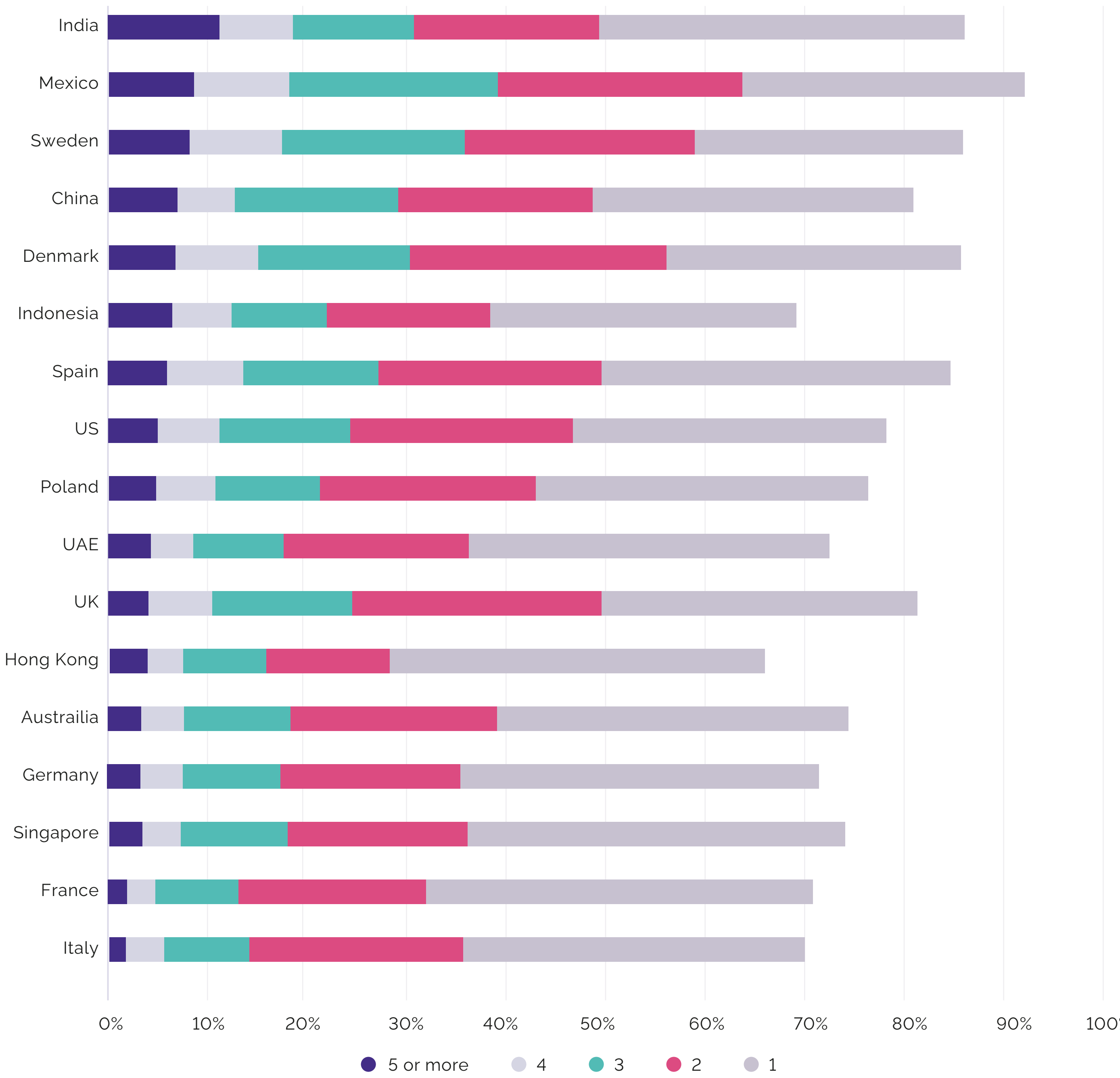


Younger people more likely to have paid subscriptions

Many consumers have more than one subscription. Our data shows that, of those who have signed-up for a pay-monthly service in Great Britain, half (50%) are signed up to more than one; in the US, 46% have more than one service. An outright majority of consumers in the Scandinavian countries in our study are signed up to multiple platforms (58% Sweden; 56% Denmark).

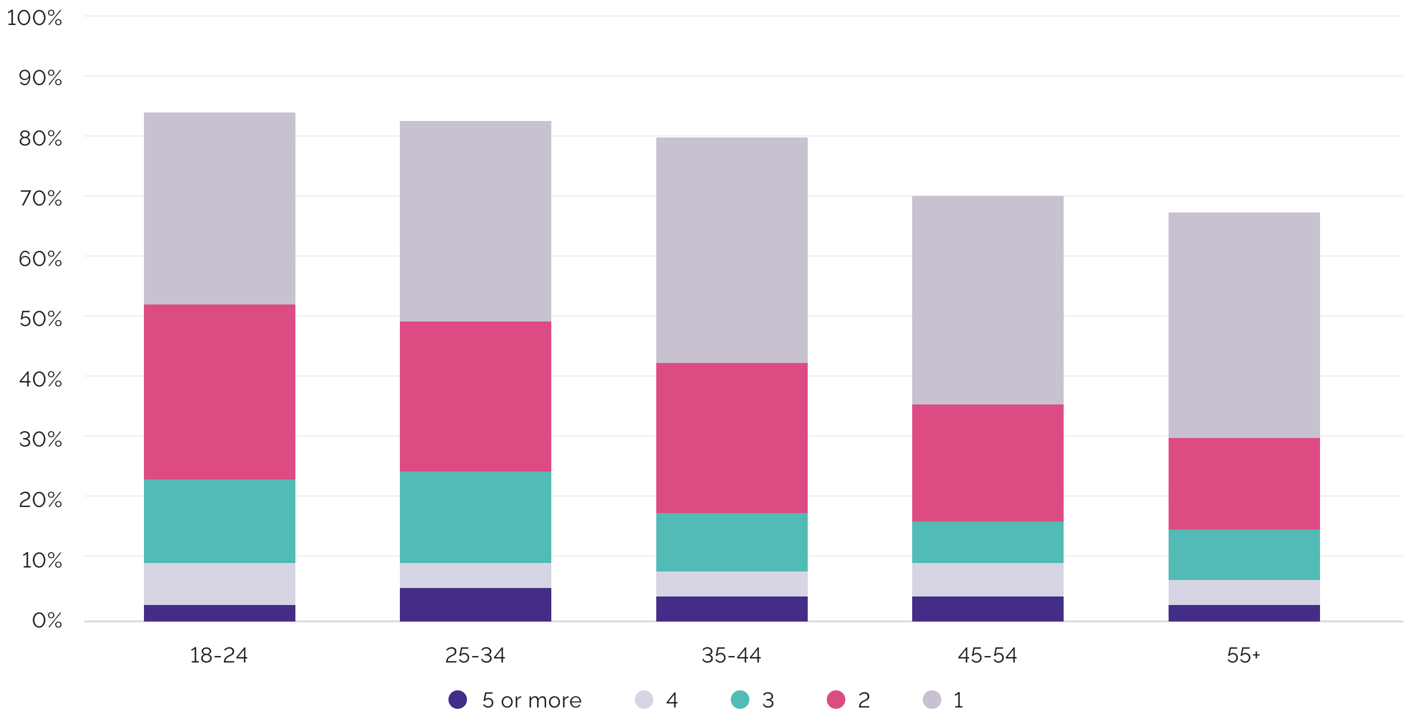
Number of different subscription types held

Do you currently have access to a paid subscription for any of the following? Please select each option even if someone else pays the subscription fee



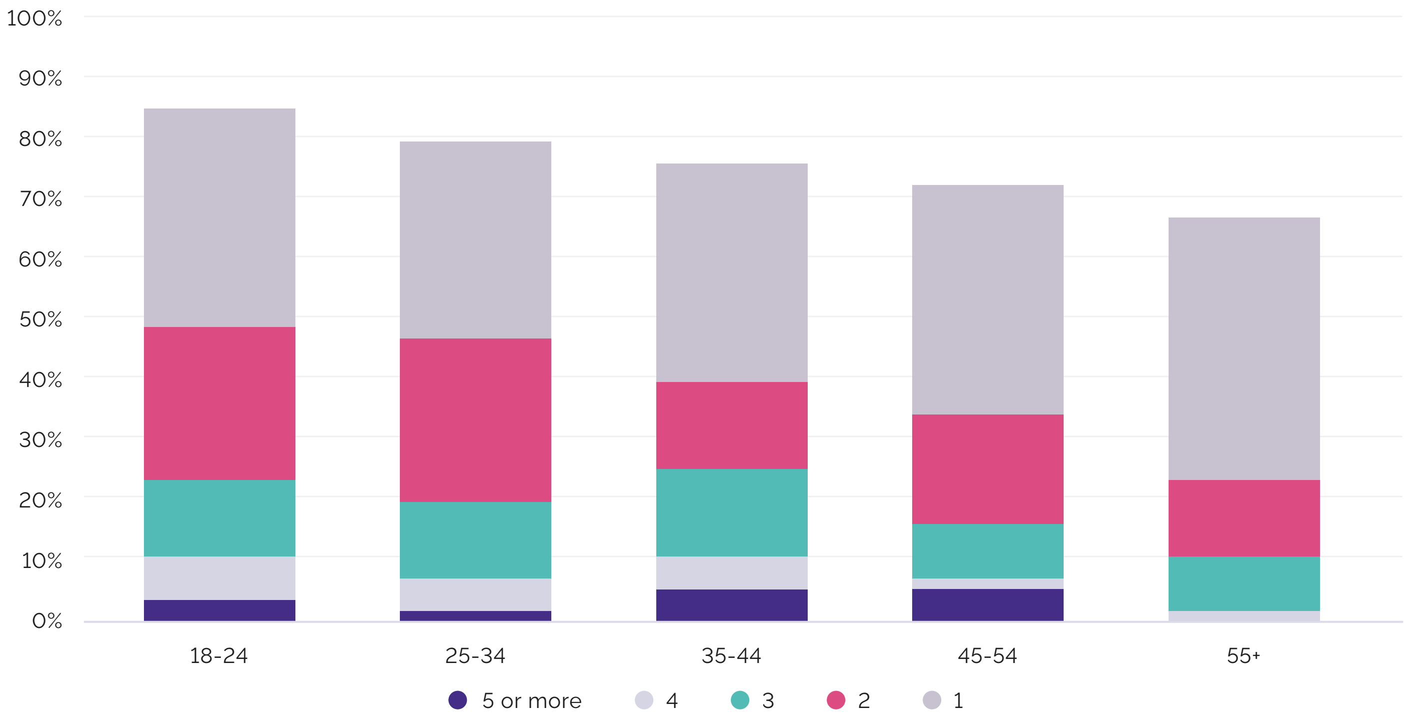
Australia: Number of different subscription types held

Do you currently have access to a paid subscription for any of the following? Please select each option even if someone else pays the subscription fee.



Singapore: Number of different subscription types held

Do you currently have access to a paid subscription for any of the following? Please select each option even if someone else pays the subscription fee



Our evidence suggests that this is disproportionately driven by younger consumers. Looking at Australia and Singapore, the younger age groups (18-24 and 25-34 year-olds) are most likely to have signed up to more than one subscription service.

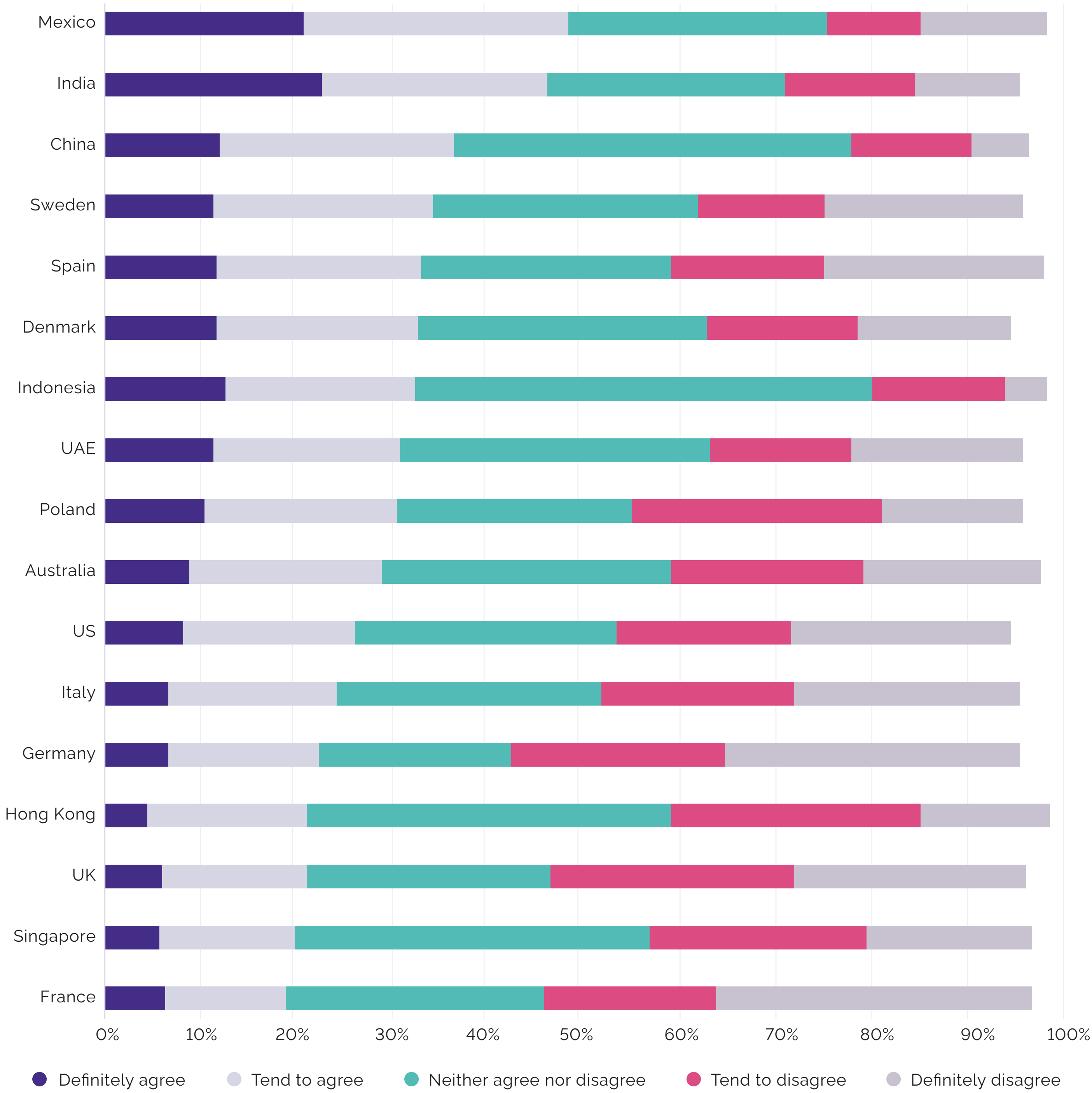
Ad-free Americans: Who prefers to pay?

When consumers are asked whether they prefer to pay for ad-free entertainment services, responses vary heavily between countries. The highest level of willingness is recorded in Mexico (49%), where almost half prefer to pay, while the lowest is in France – where the figure is just under a fifth (18%).

The US is in the middle of the pack: a quarter of consumers (26%) say they prefer paying cash to receiving commercials. But who are these viewers, readers, and listeners that are willing to pay to avoid ads?

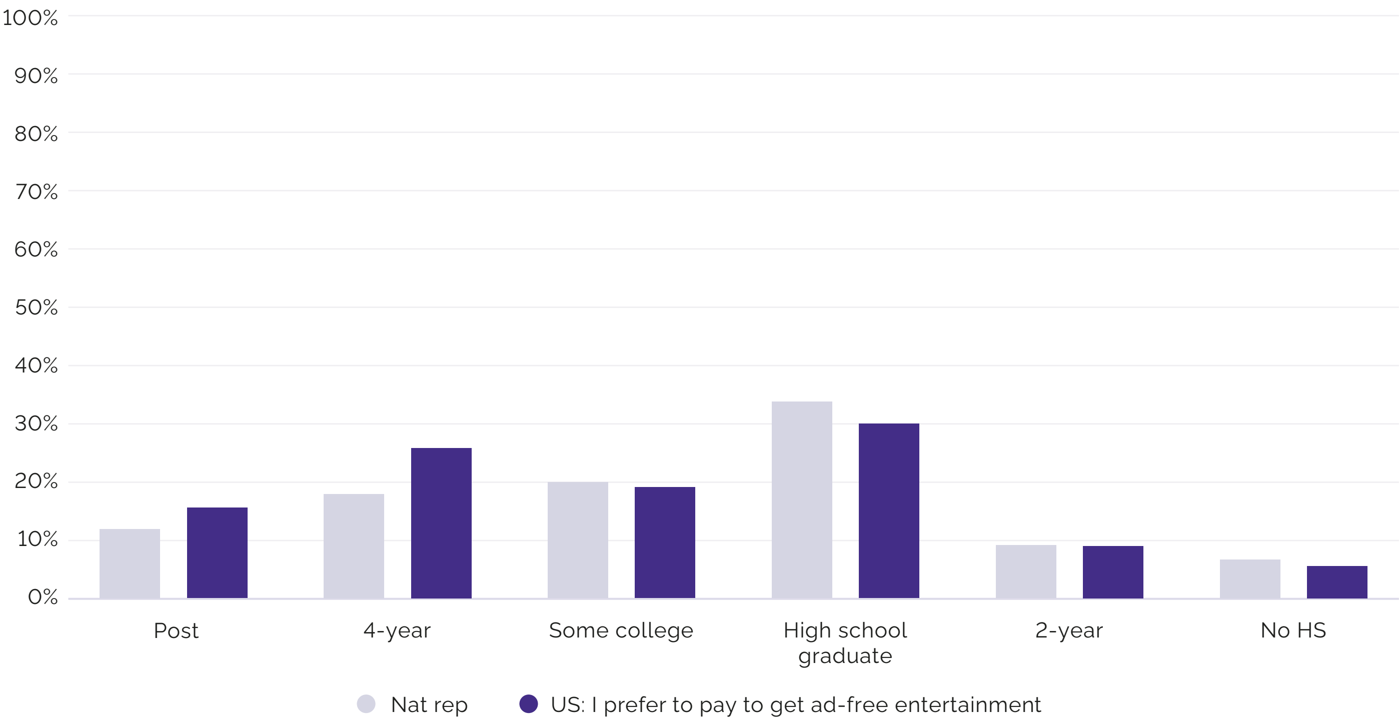
Willingness to pay for ad-free content

I prefer to pay for advert-free entertainment services

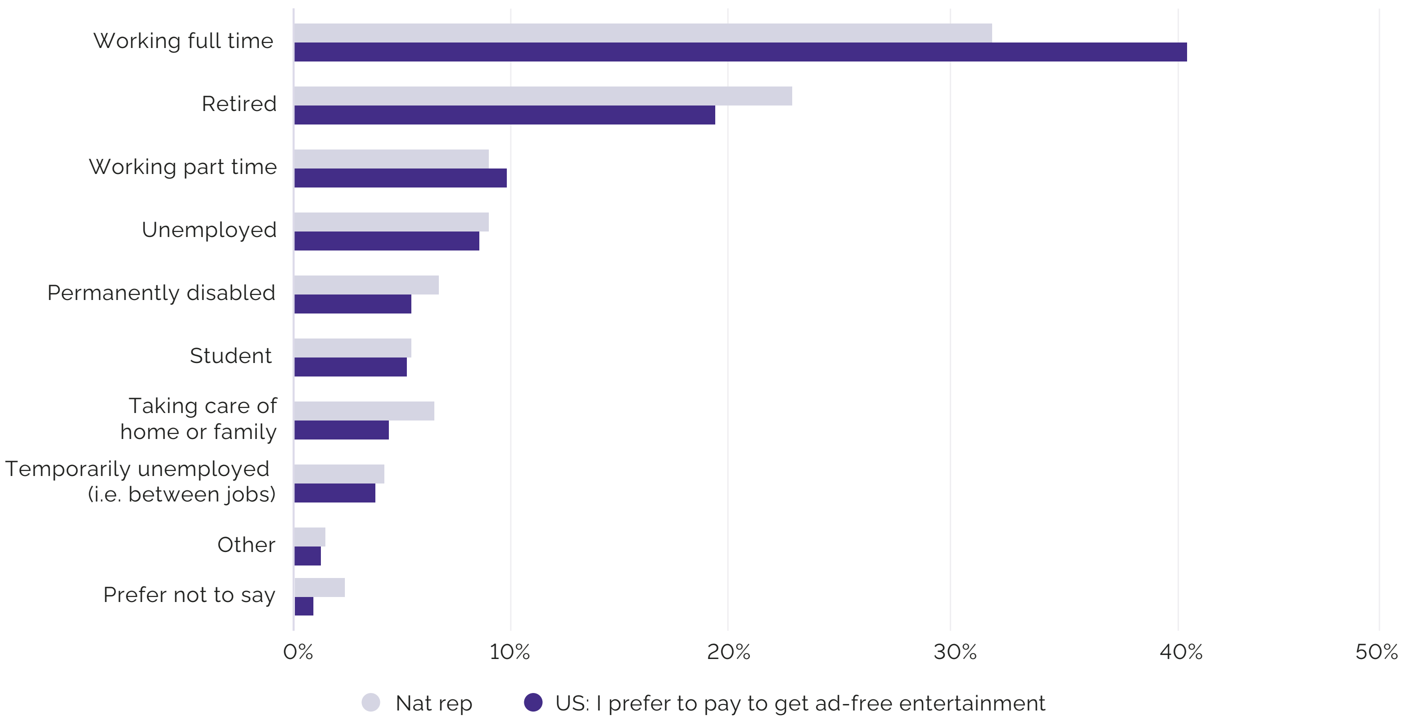


Ad-free Americans are more educated, more wealthy and more likely to be in work

US consumers who prefer to pay for ad-free content are higher educated
What is the highest level of education you have completed?

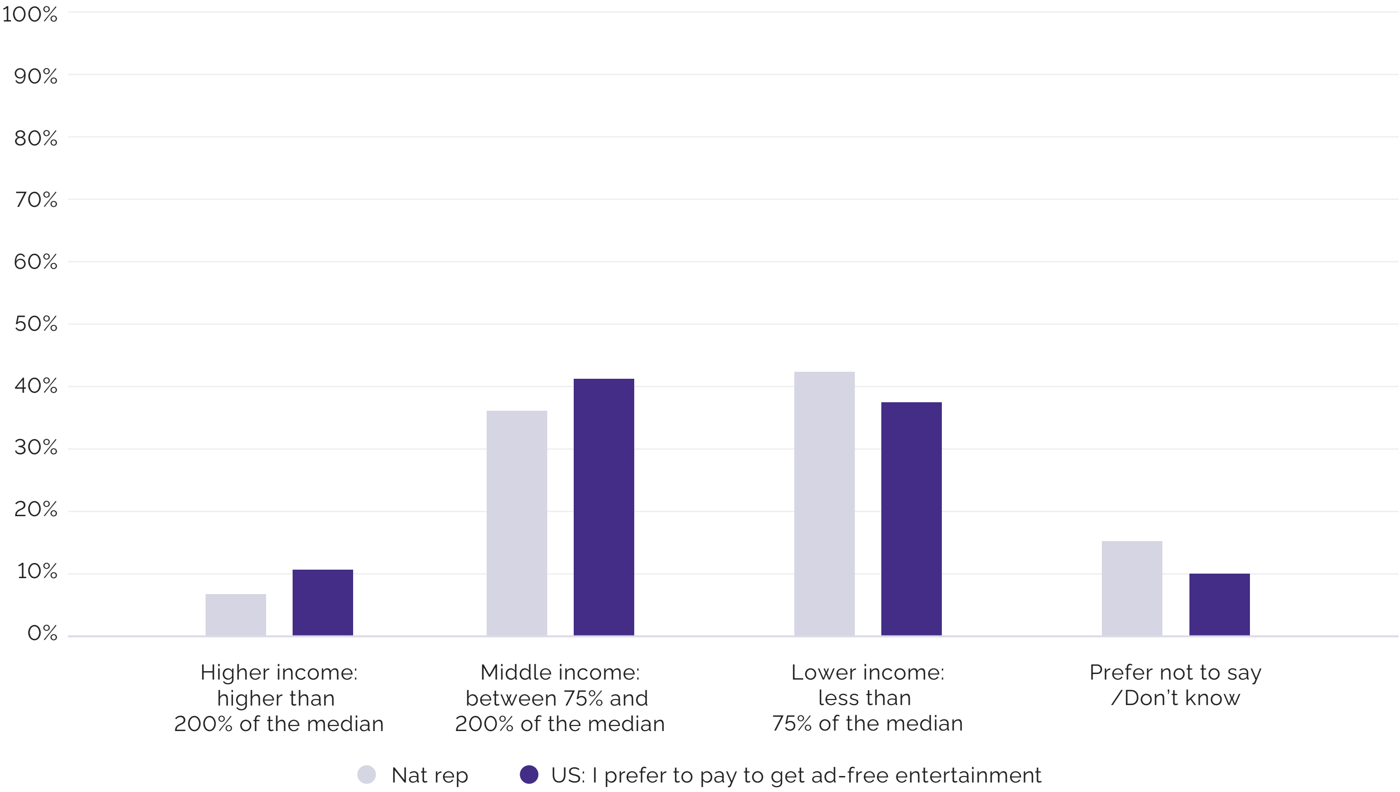


US consumers who prefer to pay for ad-free content are more likely to be working full time
Which, if any, of the following options best describes your current employment status?



US consumers who prefer to pay for ad-free content are slightly more likely to have a higher income

This variable is derived from income, and uses the median national income to create the responses:



Ad-free Americans are more likely to pay for online magazines and newspapers

For US media buyers, the group of viewers who prefer their entertainment ad-free present an obvious problem. How do you engage consumers who are willing to pay just to avoid marketing content – a group where two-thirds (65%) outright say they mute the advertisements on TV (compared to 50% of the US public)?

Our data indicates that it's a problem that extends past streaming services. Four in ten (38%) say they're willing to pay to access newspaper content online versus a quarter of the public (23%) which, given the rise of ad-free tiers for some subscriptions, could pose a problem for media buyers. A similar proportion say they would pay for access to magazine content (36% vs. 19% nat rep).

Three-quarters of ad-free Americans say "streaming services have changed TV watching for me"

Attitudes (net agreement)	Ad-free Americans	Nat rep
I would pay for access to magazine content online	36%	19%
I tend to mute the advertisements on TV	65%	50%
Streaming services have changed TV watching for me	74%	59%
I would pay for access to newspaper content online	38%	23%
I'm happy to spend money to support my favorite music artists	63%	49%
I don't mind using my bank cards to buy things on the internet	76%	63%
Video and music streaming services should offer more group subscriptions	73%	55%
I like to discover new artists before my friends	38%	25%
I generally prefer to buy things online rather than in stores	57%	43%
I prefer to have more than one bank account	57%	43%

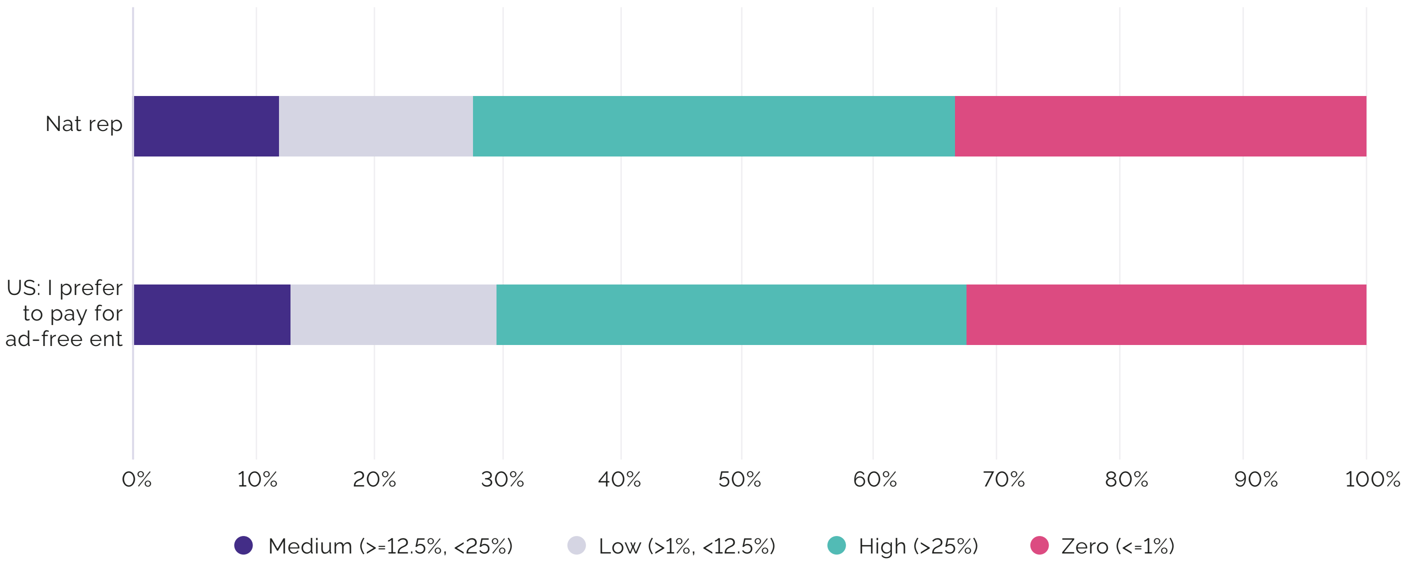
What channels do ad-free Americans favor?

Ad-free Americans are not unreachable for brands, though. While our data shows that their two most-used services are Netflix and Amazon Prime Video – both commercial-free – they are almost as likely as the general public to watch broadcast or cable TV, and in fact, watch live TV slightly more than they watch streaming content. As with the general American public, they're most likely to watch live TV during primetime.

US: American viewing habits

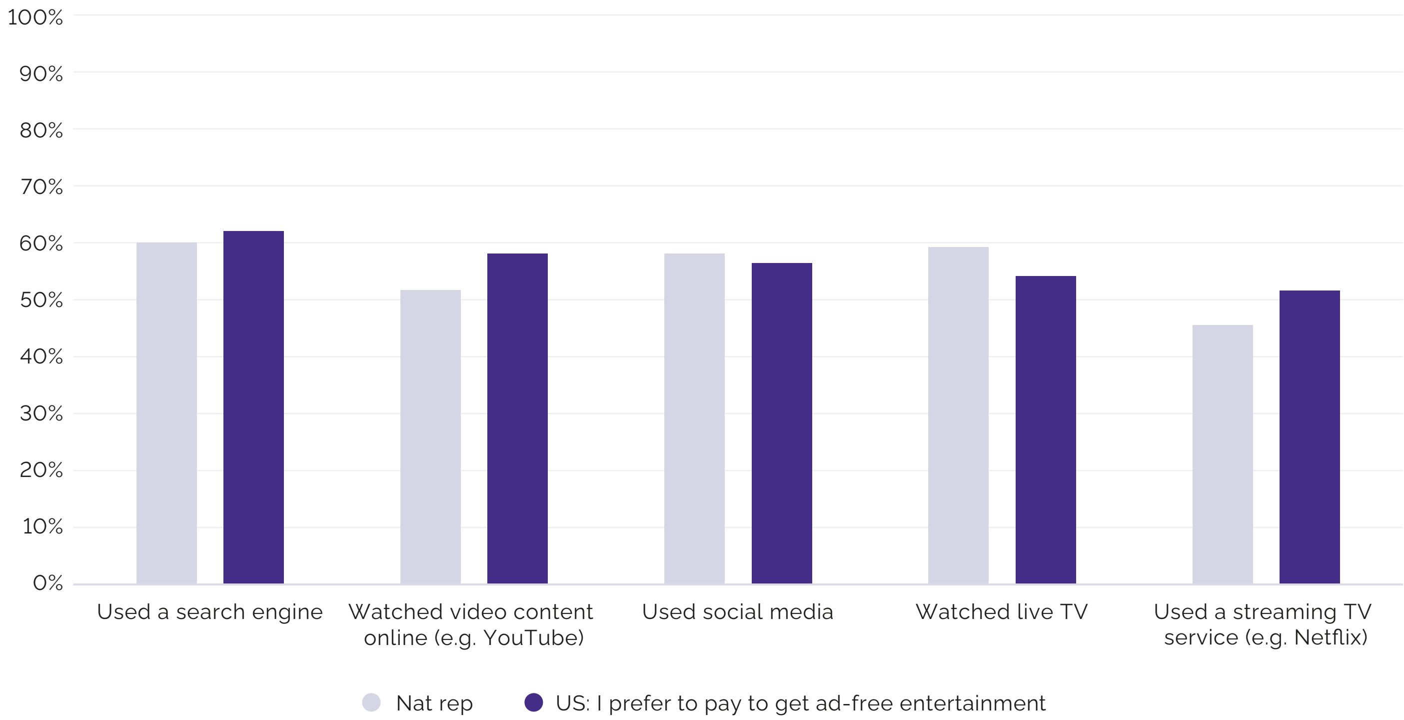
Like the rest of the nation, ad-free Americans are most likely to watch TV during prime time

Primetime TV viewing propensity.



More than half ad-free Americans used a streaming service and watched live tv

Which, if any, of the following have you done in the last week? / You said earlier that you watched something on a TV set. Which of the following did you watch?

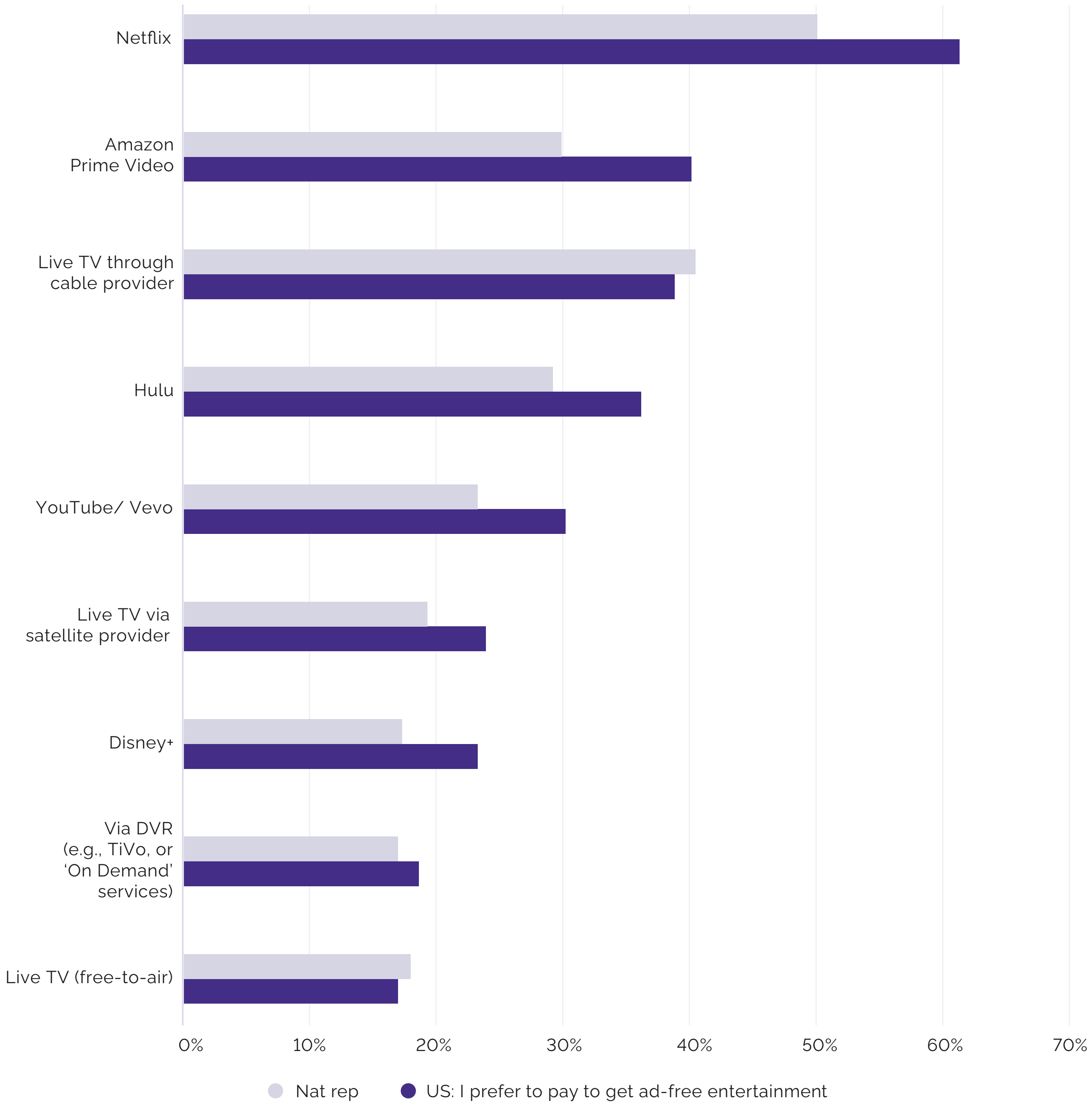


Some of their favored services (i.e. Hulu and YouTube) also have both paid and ad-supported tiers.

So Americans who are willing to pay to avoid ads are not wholly insulated from ad-supported content. This does not necessarily address their lower enthusiasm for marketing content, but it does mean that buyers can reach this audience – even if they have to work harder to get their attention.

Most-used media services

Services used to watch TV yesterday (12 months combined), Target: US Agree I prefer to pay for ad-free ent, Control: Nat Rep



CONCLUSION

This study is intended to serve as a benchmark for forthcoming annual reports into the state of traditional and digital media – in the US, the UK, and across the globe. We expect to compare its findings against consumer preferences and behaviors in years to come.

However, in its own right, this report serves as a snapshot of a truly unusual year for the international media landscape: one full of distinct opportunities and challenges for media buyers.

In 2020, our key findings are:

1. There is truth in some common media clichés…

Print media is largely embraced by older consumers. Younger people are more likely to watch Netflix, Amazon Prime, or a comparable streaming service, and less likely to embrace traditional channels. Those who consume content via traditional formats such as live TV are also frequently users of other traditional formats – such as radio – and tend to be older.

And significantly more consumers are going digital-only than traditional-only.

In these areas, our study reflects the conventional wisdom about the overall future direction of the media industry.

2. …but it's not the whole truth.

If the report affirms conventional wisdom in some areas, it challenges it in others.

For instance, if tech-driven platforms have treated commercial breaks as a pain point, most consumers continue to think they are a fair price to pay for the content they enjoy. Even those who might prefer to pay for their content still make up a significant proportion of primetime TV viewers – so even if they do not like ads, they are willing to tolerate them to some extent. And exploring the French market reveals that three quarters of those who have recently watched online streaming content still watch live TV, so there may not be much appetite for abandoning it entirely in favor of digital platforms.

3. Younger people are driving paid subscription uptake but TikTok shows that technology and platforms can leap across generational divides

While those who agree that they prefer to pay for ad-free entertainment remain a minority of consumers in all markets, our data shows that consumers in several countries have multiple paid media subscriptions.

The evidence suggests that this is being driven largely by younger consumers in the 18-34 age bracket – a demographic often considered highly important to media buyers, and one less likely to sit through an ad and give it their full attention.

But while trend-watchers might assume that new technology and media platforms remain the domain of the young, TikTok's rise this year shows that the right circumstances can confound that assumption. Technology adopted early by young audiences can quickly transition into older audiences if the environment is right.

4. COVID-19 has changed the channel(s). Will its impact last?

It is unlikely that many media buyers factored a global pandemic into their 2020 plans. But even if they did, it is improbable that they could have predicted the full impact of COVID-19 on the international media industry.

Our research shows the effect the ongoing crisis has had on everything from live TV and streaming services – which both benefited from the pandemic to some extent – to car radio consumption and print news (which were less fortunate).

But however COVID-19 has changed the media industry in 2020 is perhaps less important than whether these changes are permanent.

Some expect that the global rollout of vaccines will herald a return to the status quo. But with entertainment companies such as Warner Bros and Disney converting much of their traditional media slate to digital and streaming services, the pandemic may have simply accelerated what some saw as inevitable – and revealed a "new normal" for the industry going forward.

OUR DATA

This study combined syndicated Cube data with specific, deep-dive custom research in 17 markets. Fieldwork was conducted in November 2020.

Market	Sample type	Survey start date	Sample size
Australia	Nat rep	03-Nov	2025
China	Online rep	02-Nov	1012
Denmark	Nat rep	04-Nov	1032
France	Nat rep	05-Nov	1008
Germany	Nat rep	04-Nov	2256
Hong Kong	Online rep	02-Nov	514
India	National urban rep	03-Nov	1017
Indonesia	Online rep	02-Nov	2111
Italy	Nat rep	05-Nov	1006
Mexico	Nat rep (with urban bias)	03-Nov	1059
Poland	Nat rep	04-Nov	1026
Singapore	Nat rep	03-Nov	1058
Spain	Nat rep	05-Nov	1011
Sweden	Nat rep	04-Nov	1029
UAE	Nat rep	02-Nov	1020
UK	Nat rep	04-Nov	2078
US	Nat rep	03-Nov	2014

YouGov

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Our line of products and services include YouGov BrandIndex, YouGov Profiles, YouGov RealTime, YouGov Custom Research, YouGov Crunch and YouGov Direct.

With over 11 million registered panellists in more than 55 countries, YouGov's market research covers the UK, the Americas, Mainland Europe, the Middle East, and Asia-Pacific. Our panellists come from all ages, socio-economic groups, and other demographic types – allowing us to create representative samples of whole populations and different sections of society.

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