

Entertainment

GWI's flagship report on the latest trends in entertainment

GWI.



In this report

- 04 **Introduction**
- 05 Discover our data
- 07 **Key insights**
- 09 **TV trends to watch**
Are consumers cutting the cord because of online TV? What's next for streaming platforms?
- 29 **Video views**
Which social platforms do consumers turn to most for their entertainment fix? What types of video content are they craving?
- 37 **Audio insights**
Is music streaming still popular? What kind of music appeals most to consumers? How to use podcasts as a marketing tool?
- 57 **Gaming findings**
How has the gaming audience diversified? What role do video streaming services and social platforms play in the gaming experience? What's the deal with gaming and the metaverse?
- 67 **Esports answers**
Who are esports followers? What matters to this audience? How do they feel about sponsorship in esports, and what should companies keep in mind?
- 77 Appendix
- 79 Notes on methodology

Click the dots to navigate



Methodology & definitions

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 more young, urban, affluent and educated than the total population.

Each year, GWI interviews over 700,000 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 9 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 Click the dots is 20% below the global average.

Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyper-link 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.

Sneak preview of our new platform

The screenshot displays the GWI platform interface. At the top, there are navigation tabs for 'Charts', 'Audiences', and 'Crosstabs'. The main area is divided into two panels. The left panel shows a filter configuration for 'New Audience 7 May 2020 12:33'. It includes a 'Data set' dropdown set to 'GWI Core', a 'Waves' dropdown set to 'Q2 2020', and a 'Locations' dropdown set to 'UK'. Below these are filter rules: 'Include people with All of these 2 attributes' (Age (Groups) > 16 to 24 OR Age (Groups) > 35 to 44) and another rule for 'Include people with All of these 2 attributes' (Interests > Music). The right panel shows a chart titled 'New Chart 6 Feb 2020 12:33' with a 'Your audience sample size is 9,188' callout. Below the chart is a table with columns: 'Data point %', 'Universe', 'Index', 'Responses', and 'Audience %'. The table contains data for 'Someone in my household has a mental health issue' with five rows of values.

Data point %	Universe	Index	Responses	Audience %
100	15.7K	84.9M	100	47%
100	15.7K	84.9M	100	32%
100	15.7K	84.9M	100	52%
100	15.7K	84.9M	100	38%
100	15.7K	84.9M	100	16%

1 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
- Base** and base

Key insights

Streaming platforms reach peak subscription

Although movie streaming was a clear winner of the pandemic, it's now struggling to sustain its growth. Competition for new subscribers is fierce and new media formats are taking time away from the small screen.

Music streaming is gathering pace

The gap between music streaming and radio is wider than ever, with more older users getting their audio fix online. For marketers still not persuaded to move the needle toward streaming, now's the time to craft campaigns.

TikTok continues to grab attention

TikTok is the fastest-growing social app across all age groups, swiftly becoming the go-to place for entertaining short-form content. It's important to not overlook older consumers, who are increasingly gravitating toward visual content.

Gaming is no longer a young boys' club

Gaming continues to be not just popular overall, but it's also making gains among older generations and women. Before brands jump in, though, understanding and listening to gamers is an absolute must.

Sponsors are welcomed in esports

Esports followers are more receptive to sponsorship than you might think – even when non-gaming brands are concerned. But the audience is sensitive to over-advertising, and stakeholders should lean into what resonates with fans. They long for a sense of community and involvement, so using esports teams or players as influencers could be one way to create campaigns that appeal to them.

01 TV trends to watch

The evolution of traditional and online TV

The pandemic accelerated online TV watching with consumers globally spending 1h 26m streaming movies on an average day in 2020. Since then, this growth has slowed down and broadcast TV remains firmly ahead of online TV. Globally, people are still spending an average of 25 minutes more watching traditional TV, with this gap being as large as 1h 03m in North America and 1h 12m in Europe.

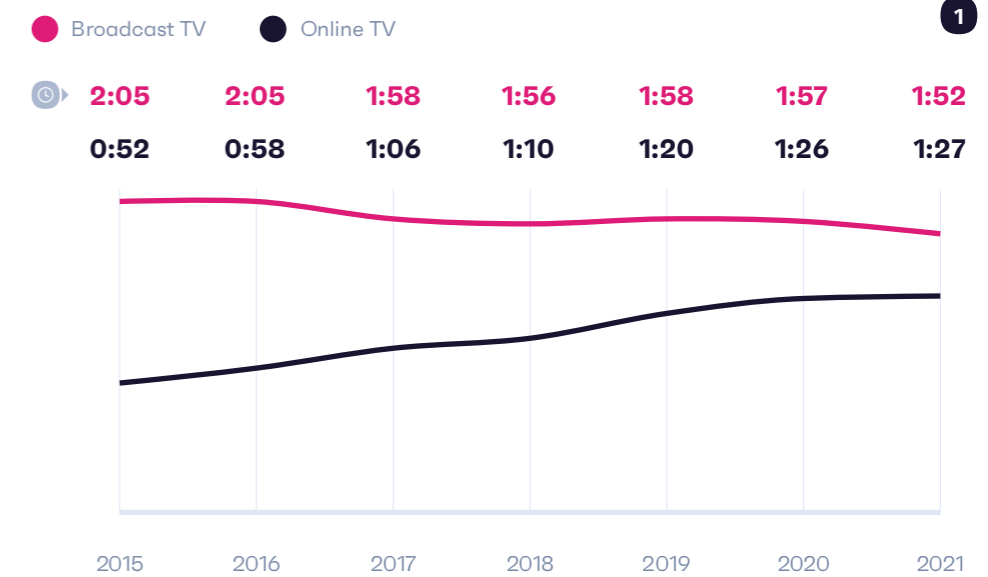
But advertisers and marketers should be aware that online TV is progressively eating up a larger portion of the overall viewing time. In 2015, 71% of TV watching happened on broadcast TV, but in 2021 this figure had shrunk to 56% and we expect the gap between

online and broadcast TV to fully close in the near future.

This will largely be driven by younger generations, with 2021 being the first year **Gen Z** were spending slightly more time watching online than linear TV (1h 28m vs 1h 27m). As primary trend-setters, Gen Z's behaviors are a good indication of where the TV watching trend is headed. APAC, with its younger internet population, will likely be the first region to close the gap but it's also the only region that saw streaming TV reverting back to its pre-pandemic levels (1h 29m). This may suggest some level of saturation given our Q4 2021 wave of research shows a further decline to 1h 24m.

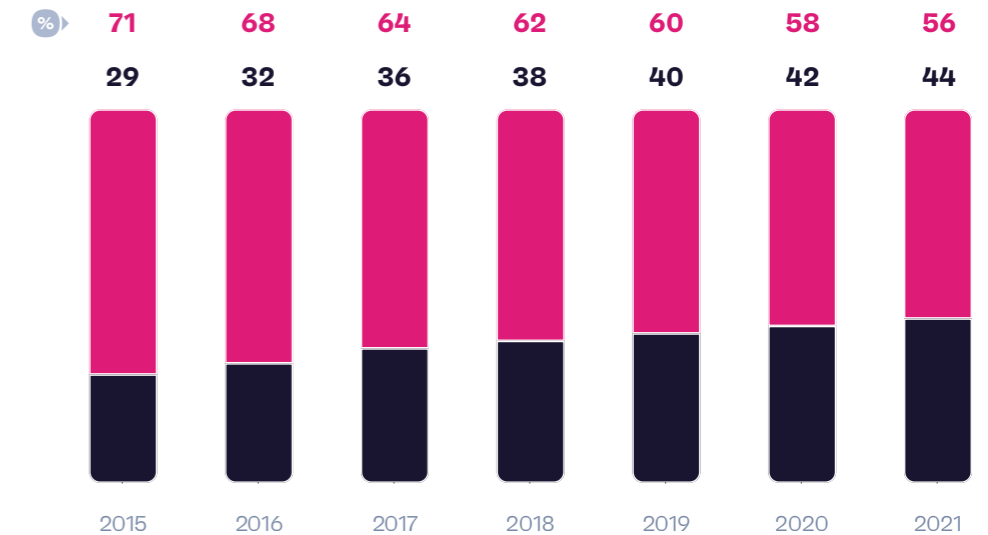
Streaming services' growth is slowing...

Average time spent per day watching broadcast/online TV in h:mm



... but they continue to eat up a greater share of overall TV viewing

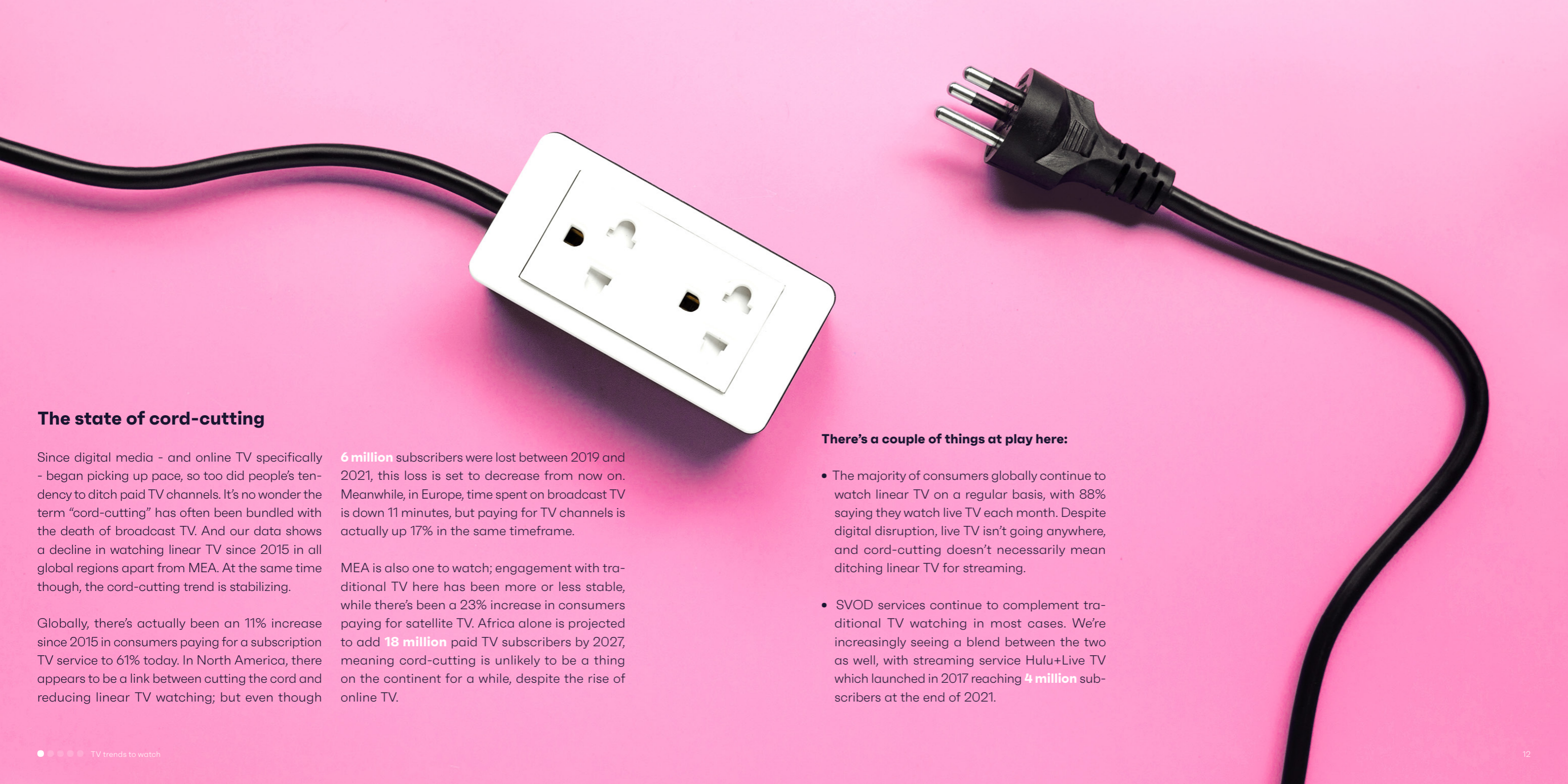
% of total TV consumption that is on broadcast/online TV



Need a global guide to grasping Gen Z?
Your Gen Z vibe check



GWJ Core 2015-2021 (Averages of waves conducted between Q1 2015-Q4 2021) 3,289,311 internet users aged 16-64



The state of cord-cutting

Since digital media - and online TV specifically - began picking up pace, so too did people's tendency to ditch paid TV channels. It's no wonder the term "cord-cutting" has often been bundled with the death of broadcast TV. And our data shows a decline in watching linear TV since 2015 in all global regions apart from MEA. At the same time though, the cord-cutting trend is stabilizing.

Globally, there's actually been an 11% increase since 2015 in consumers paying for a subscription TV service to 61% today. In North America, there appears to be a link between cutting the cord and reducing linear TV watching; but even though

6 million subscribers were lost between 2019 and 2021, this loss is set to decrease from now on. Meanwhile, in Europe, time spent on broadcast TV is down 11 minutes, but paying for TV channels is actually up 17% in the same timeframe.

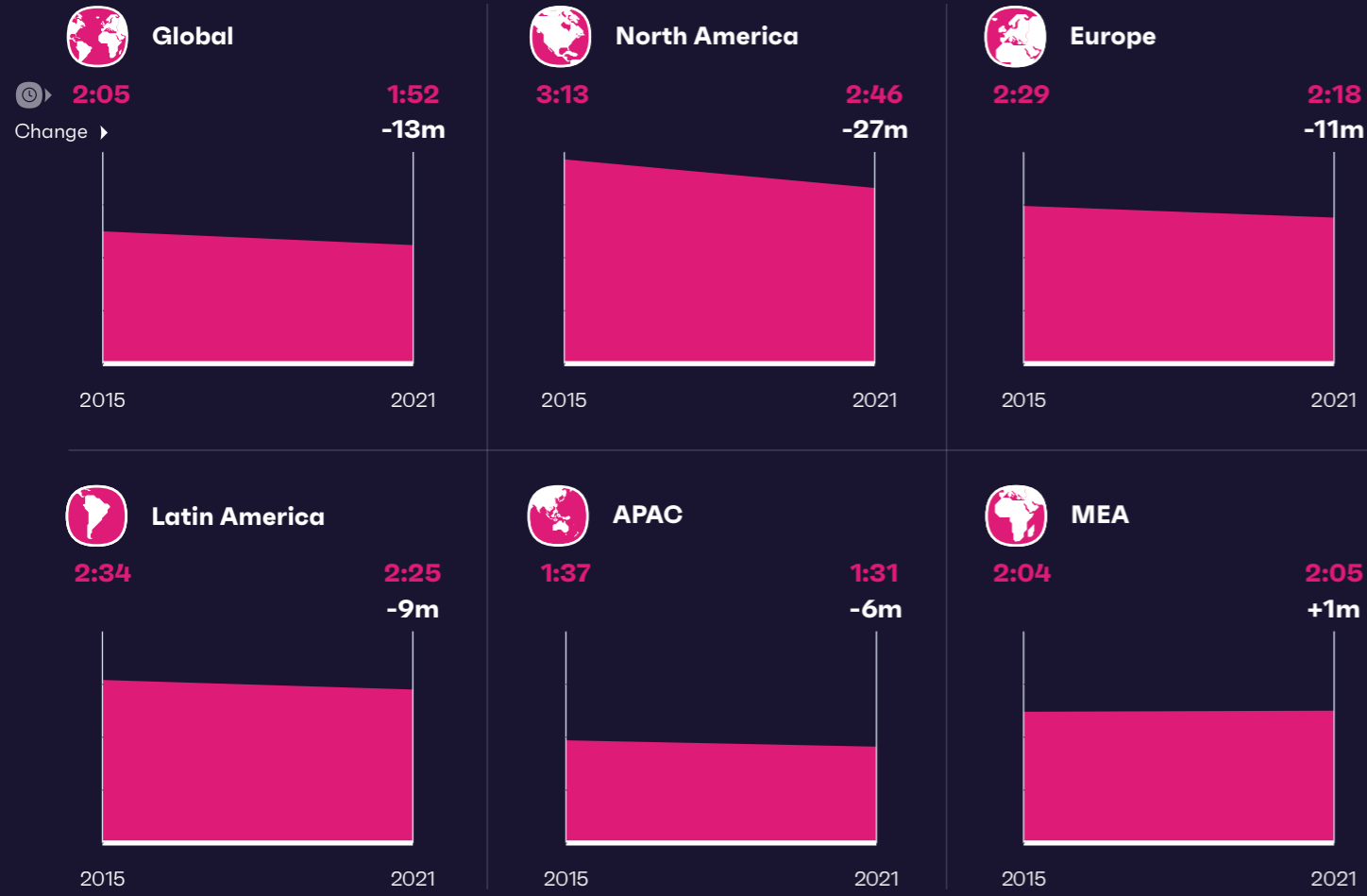
MEA is also one to watch; engagement with traditional TV here has been more or less stable, while there's been a 23% increase in consumers paying for satellite TV. Africa alone is projected to add **18 million** paid TV subscribers by 2027, meaning cord-cutting is unlikely to be a thing on the continent for a while, despite the rise of online TV.

There's a couple of things at play here:

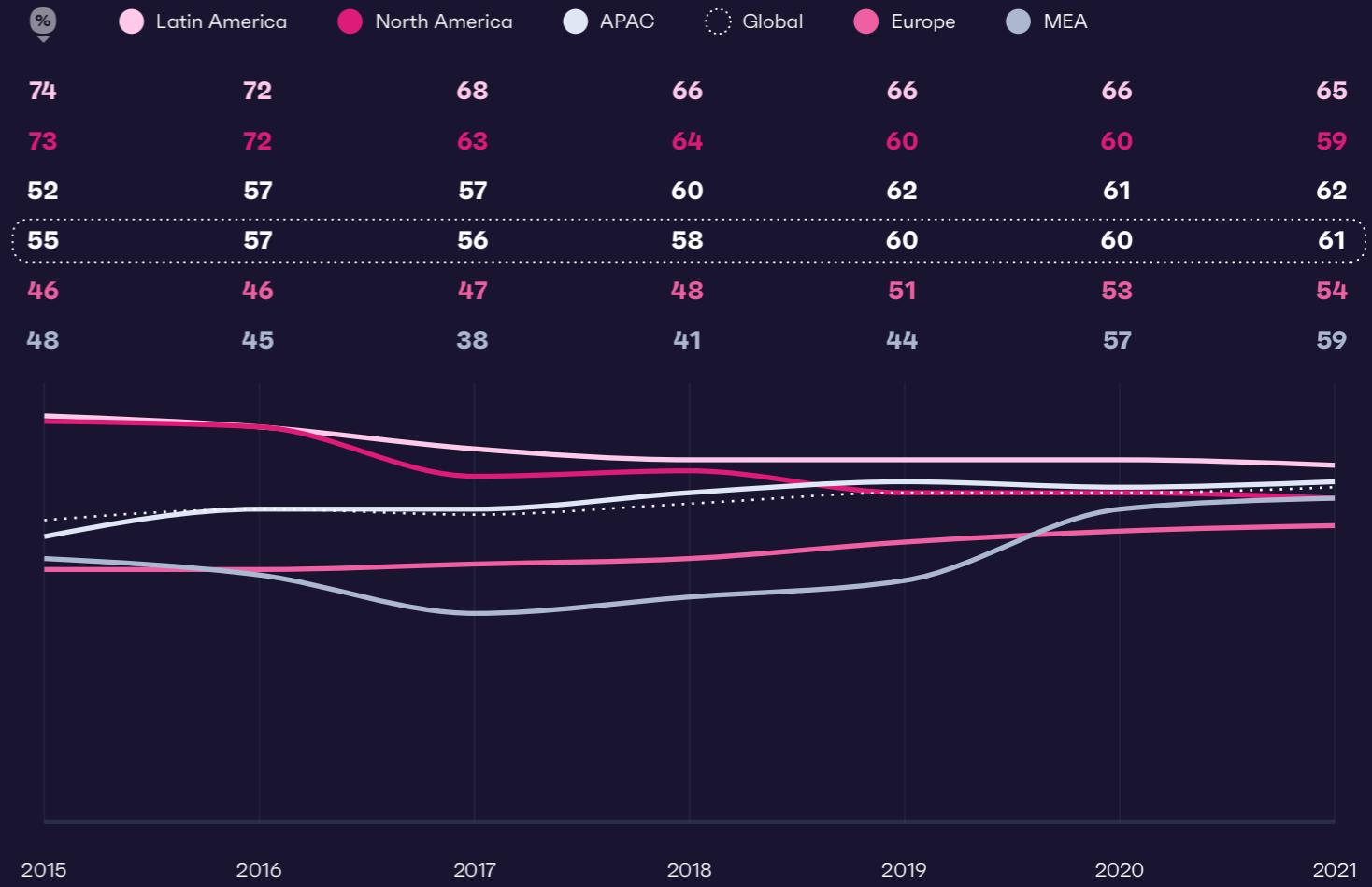
- The majority of consumers globally continue to watch linear TV on a regular basis, with 88% saying they watch live TV each month. Despite digital disruption, live TV isn't going anywhere, and cord-cutting doesn't necessarily mean ditching linear TV for streaming.
- SVOD services continue to complement traditional TV watching in most cases. We're increasingly seeing a blend between the two as well, with streaming service Hulu+Live TV which launched in 2017 reaching **4 million** subscribers at the end of 2021.

Less time watching TV doesn't necessarily mean cutting the cord

Average time spent per day watching broadcast TV in h:mm



% who say they pay for a subscription TV service





Reaching peak subscription

Like most digital media, online TV gathered pace during the pandemic. Streaming movies became a lockdown staple and our Zeitgeist research from December shows almost 4 in 10 fully remote workers watch TV shows and movies before starting work. As their third-most popular morning activity just behind checking social media and watching the news, it suggests streaming has carved a new place in consumers' lives.

As a result, it's also acquired new audiences. Since 2015, Gen X's time spent watching online TV has increased at nearly the same levels as Gen Z (with an average of 35 minutes a day). Similarly, North America and the Middle East

and South Africa have registered impressive growth. As insufficient data, slow internet speeds, and low credit card penetration continue to be a challenge in the latter, streaming services stand the best chance of scaling up by **partnering** with telco companies.

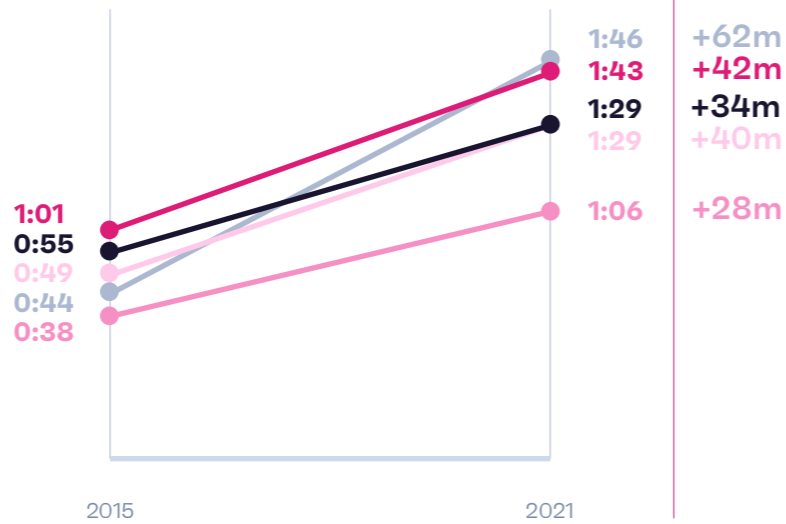
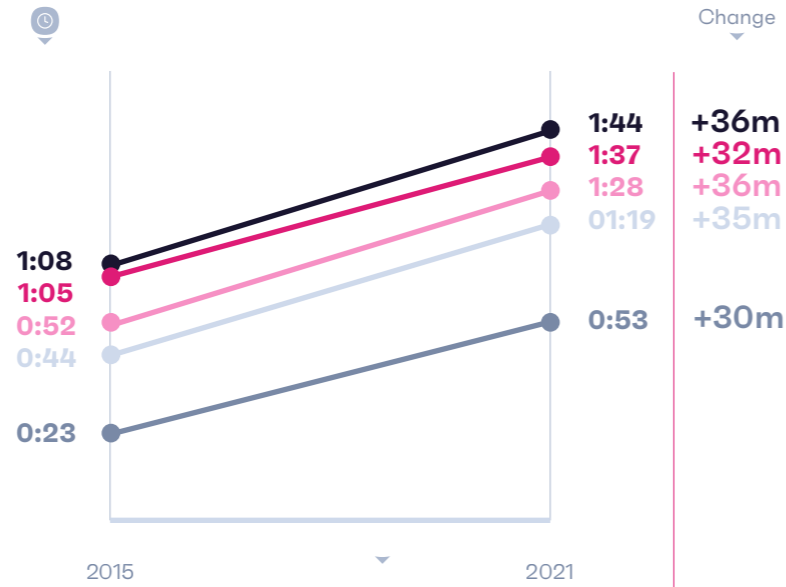
Although the pandemic has certainly diversified streaming's user base, sustaining the momentum hasn't been an easy feat. Our global data shows we may have reached "peak subscription" in the West, with the number saying they've paid for a movie or TV streaming service starting to plateau. As the battle for eyeballs intensifies, subscription fatigue follows.

Substantial uptick among older audiences and MEA...

Average time spent per day watching online TV in h:mm

- Parents with young kids
- Millennials
- Gen Z
- Gen X
- Baby boomers

- MEA
- North America
- Latin America
- APAC
- Europe



...though acquiring new subscribers is becoming a challenge in the West

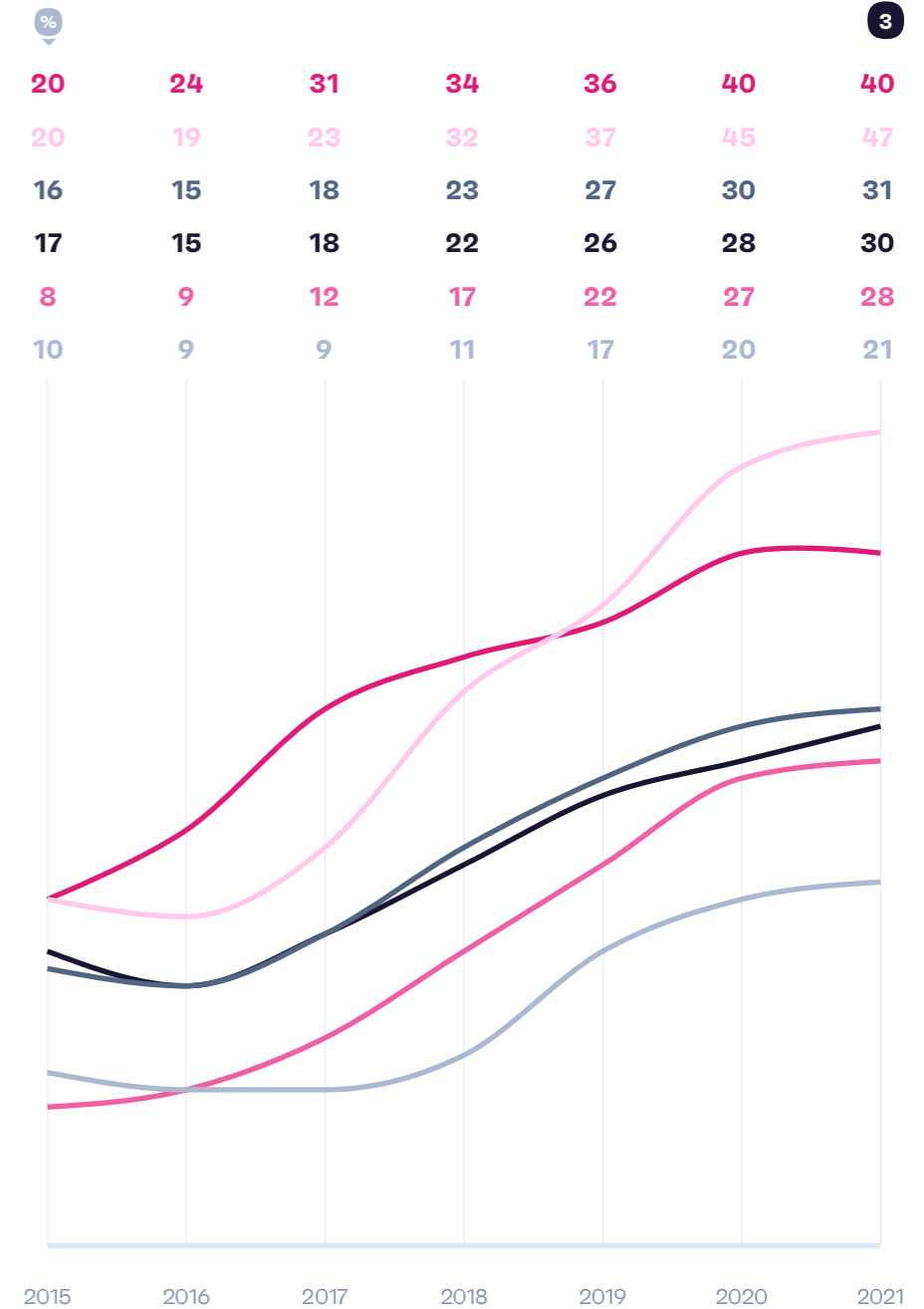
% who say they have paid for a movie/TV streaming service in the past month

- North America
- Latin America
- Global
- APAC
- Europe
- MEA



GWJ Core 2015-2021 (Averages of waves conducted between Q1 2015-Q4 2021)

3,364,110 internet users aged 16-64



Diversifying the business model

The average number of streaming services consumers use has been steadily increasing since Q2 2017 until last year when it remained static at 2.7 services. In North America this figure goes as far as 3.8, while places like the Middle East and South Africa are ripe with opportunity given internet users here are still only watching on an average of 1.8 services each month. Mobile-only services are likely the way forward in this region given we know consumers here spend almost an hour longer than the global average on their mobiles each day (4h 43m vs 3h 46m globally). Netflix has been quick to jump on the opportunity with its **mobile-only plan** across a number of African markets priced 50% lower than the basic plan.

But the vast competition in Western markets and price hikes has meant

streaming platforms have been struggling to acquire new subscribers. Netflix is still leading the charts, with the platform having the most loyal user base and attracting the majority of those already paying for other platforms. For example, 75% of Amazon Prime subscribers outside China pay for Netflix, while only 40% of Netflix's pay for Amazon.

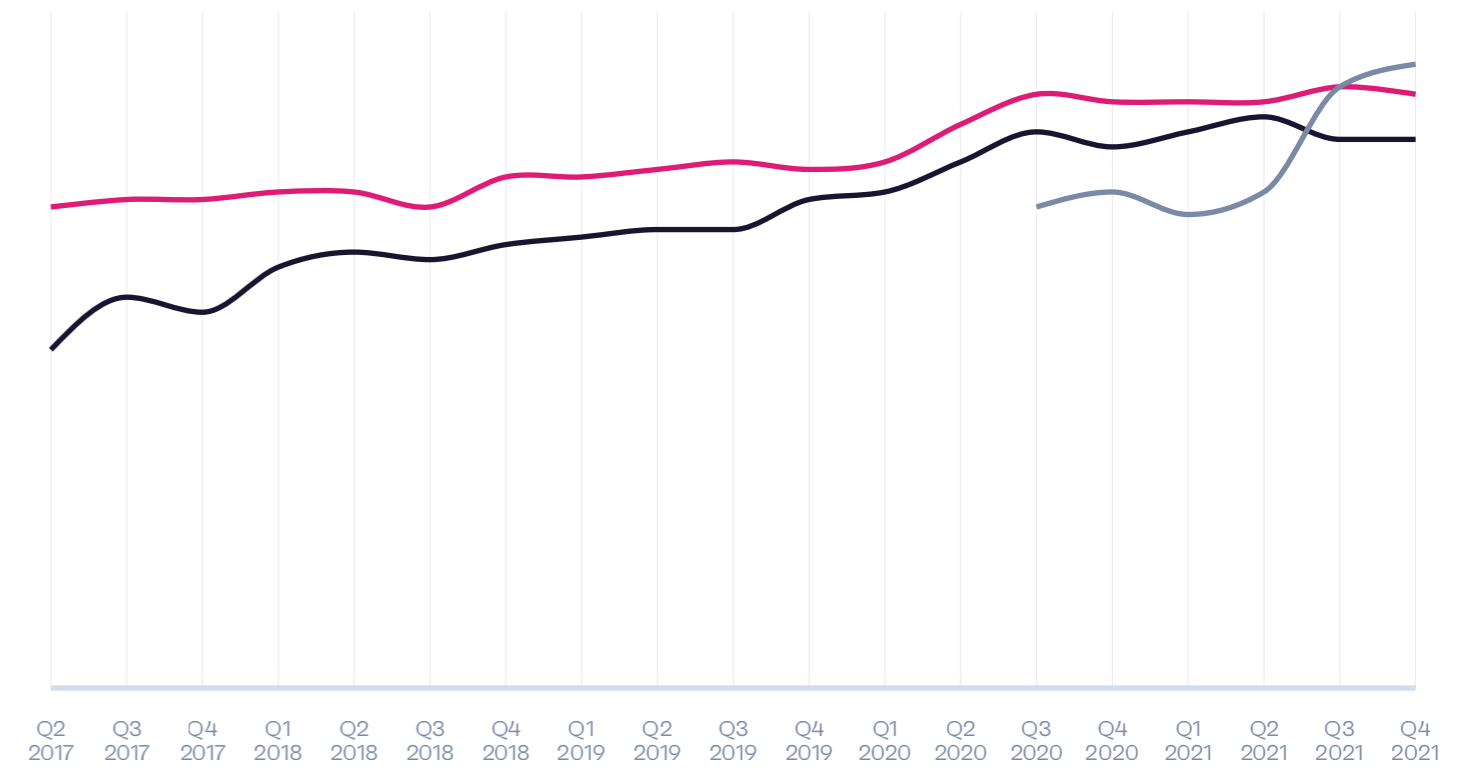
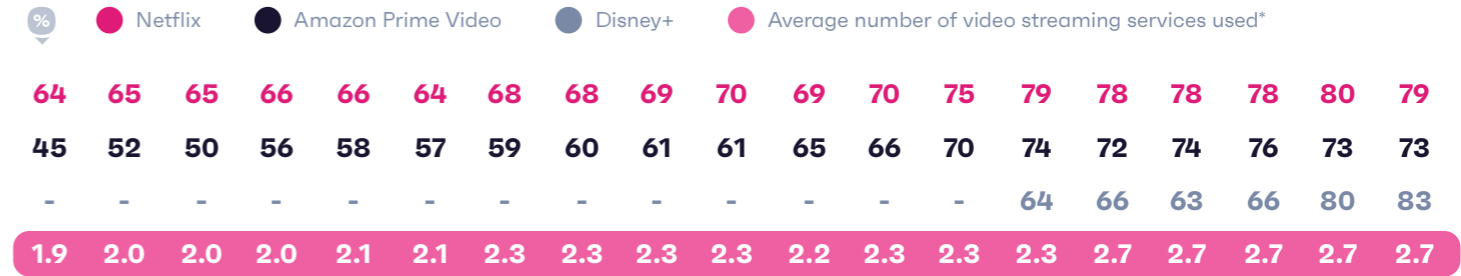
However, Disney+ is catching up fast. In fact, in Q4 2021 the platform managed to convert 83% of its users into paying subscribers, higher than both Netflix and Amazon Prime. In Q4 2021 alone, Disney+ including Hotstar acquired **11.7 million subscribers**, compared to 8.3 million for Netflix. Behind Disney's **success** sits its decision to automatically include Disney+ and ESPN+ in one

of its Hulu offerings. Put simply, subscribers pay a slightly higher price while receiving what looks like more value. It remains to be seen whether the platform will maintain this strategy in the long run.

As the definition of TV watching broadens, new players are flooding the market, and as licensing content becomes more difficult, we should expect new business models and monetization strategies to emerge. As a cheaper alternative for consumers, we expect ad-funded video-on-demand (AVOD) to take an ever bigger share. And we're already seeing big players paving the way forward; in a bid to further grow its subscribers, **Disney+** announced an ad-supported streaming service due to go live at the end of the year.

Disney+ has achieved the biggest paid subscriber base

% of each service's users outside China who have a premium account



*Excluding YouTube services

GWK Core Q2 2017-Q4 2021 2,429,911 internet users outside China aged 16-64

TV viewing by market

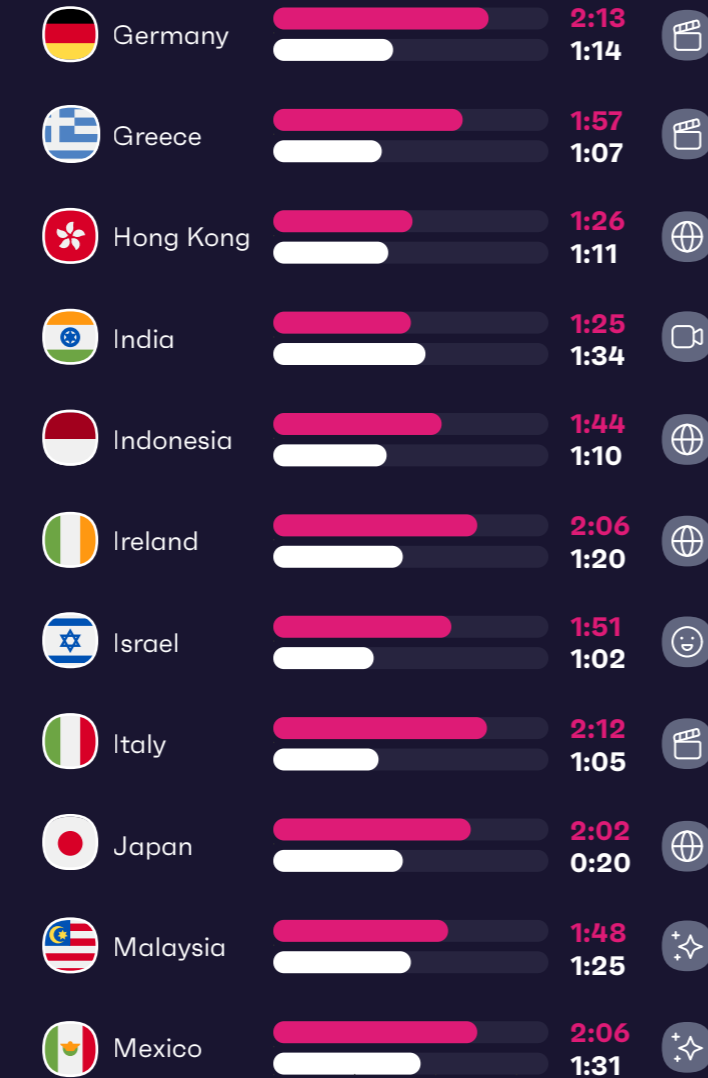
Average time spent per day watching broadcast/online TV in h:mm

● Linear/Broadcast TV ● Online TV/streaming

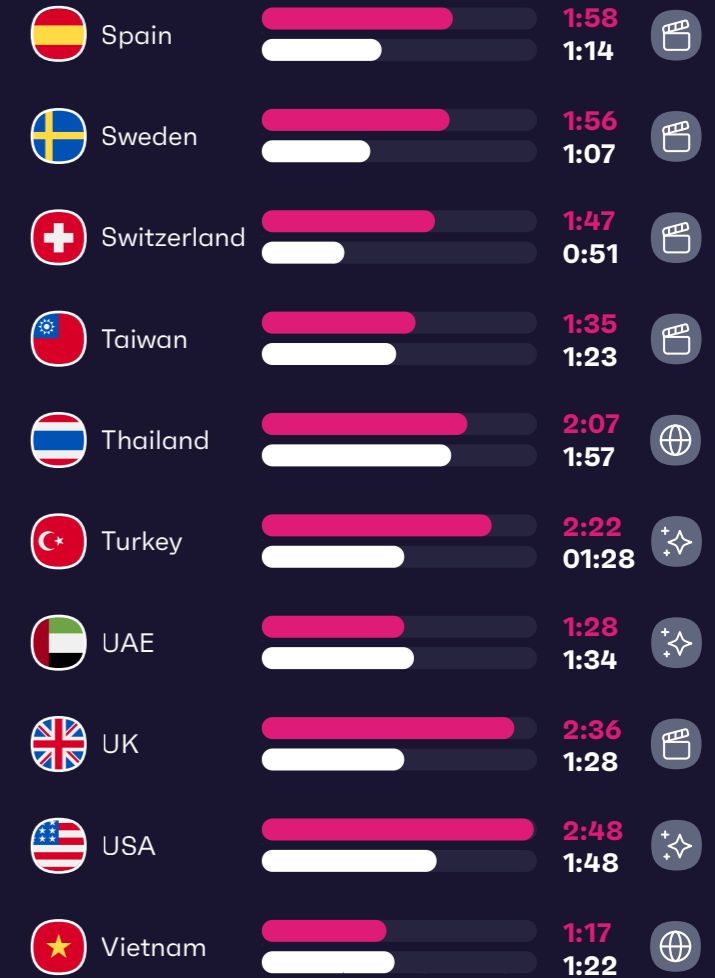


Top genres

🎬 Film/movies 🗣️ Reality 🌐 News/current affairs



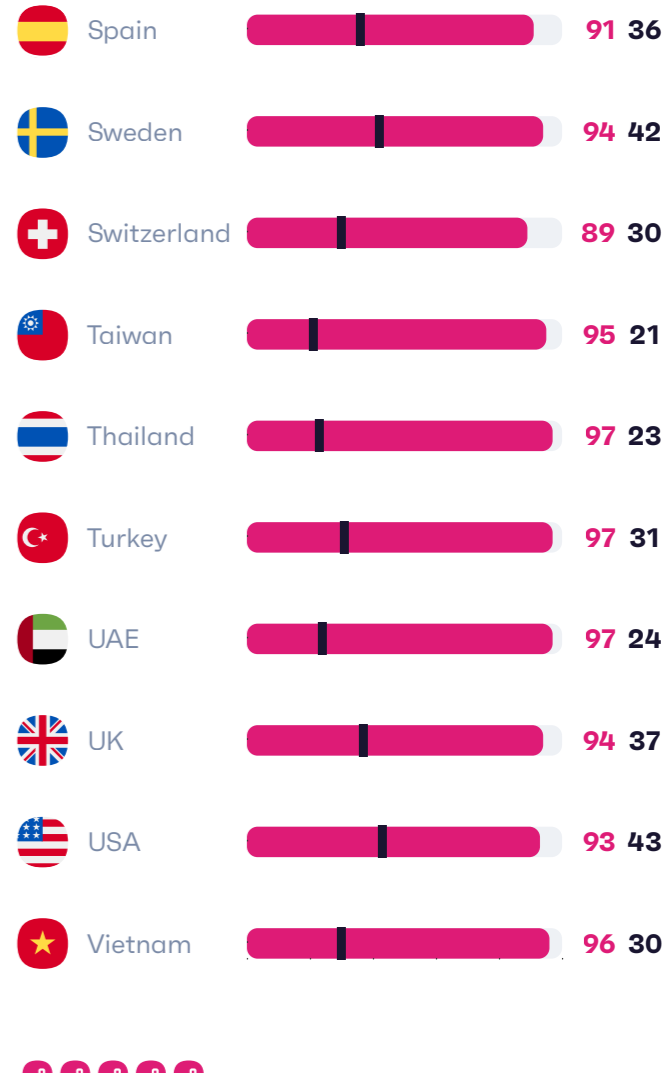
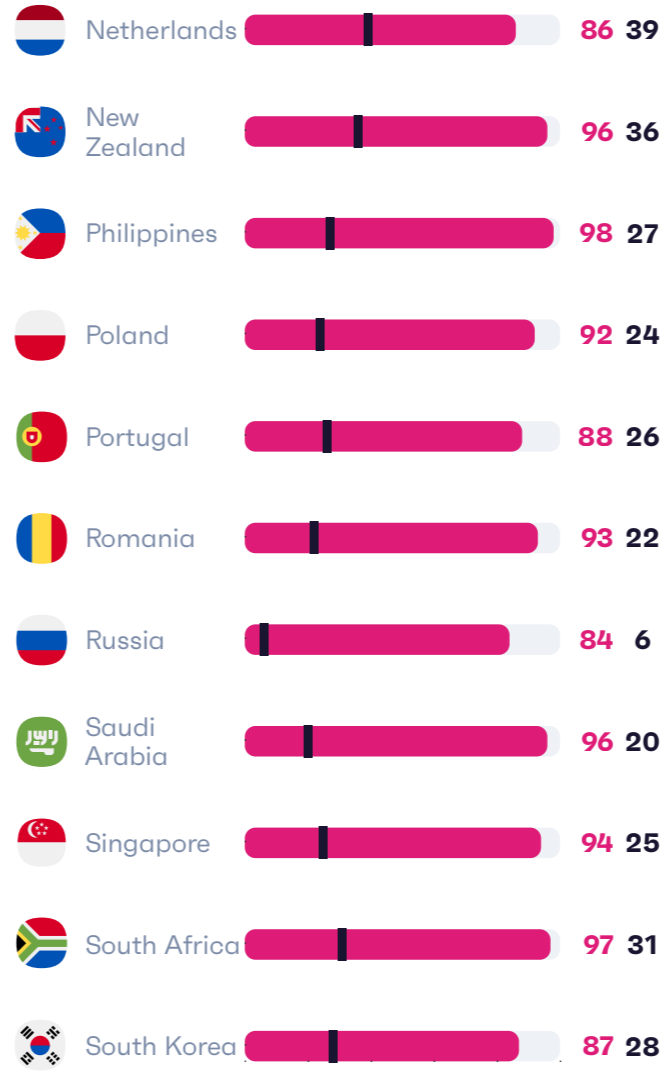
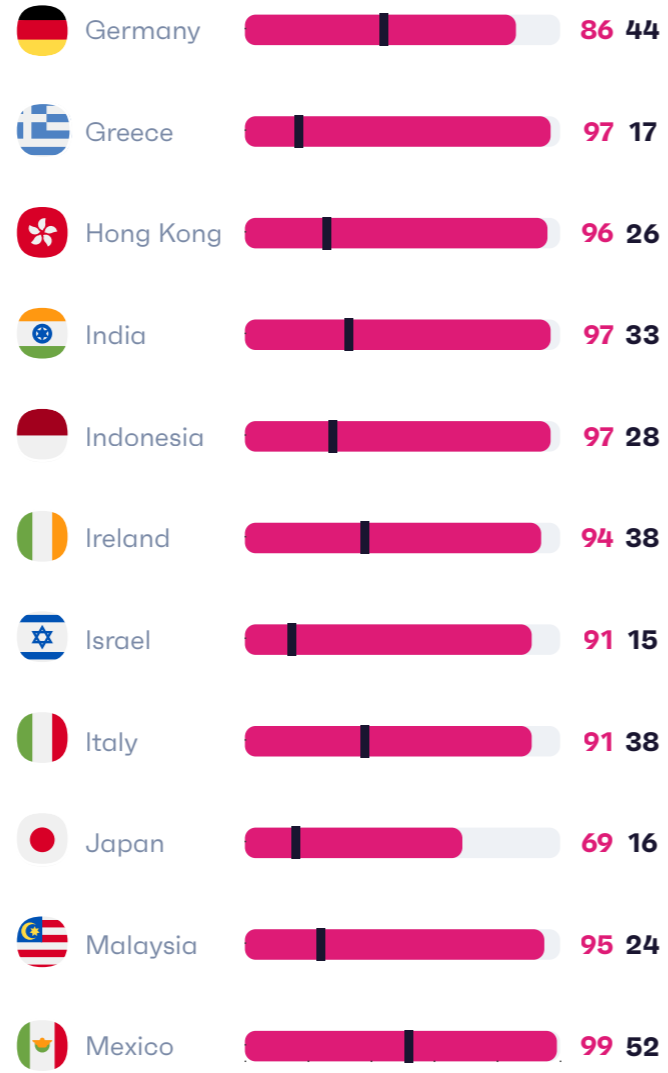
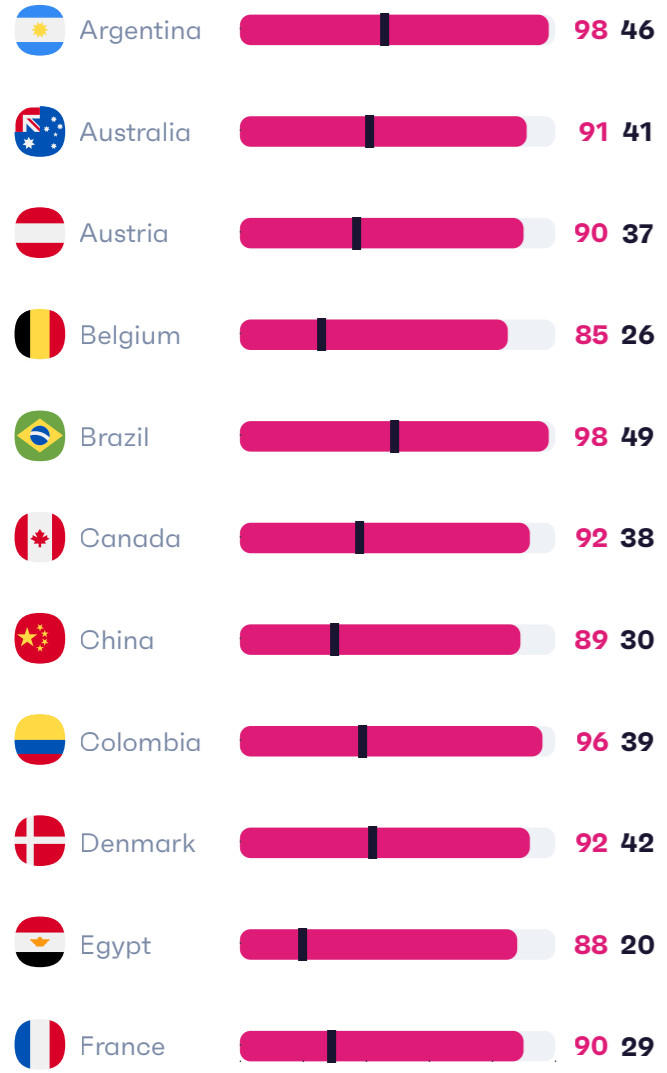
🌟 Entertainment/variety 😄 Comedy



Please note we don't track time spent on media in Ghana, Kenya, Nigeria, and Morocco

% who have watched on-demand TV/a streaming service /have paid for TV streaming service in the past month

● Watched ■ Paid for %



GW I Core Q4 2021 221,608 internet users aged 16-64

What's the next foreign-content opportunity?

Aside from making their services more affordable, streaming platforms can ensure growth by exploring untapped content types; and foreign content seems to fit the bill quite nicely. Meeting the expectations of local audiences is only one benefit of the “glocalized” media trend. An equally appealing upside is that consumers in the West are becoming increasingly more comfortable with content from overseas.

In fact, as much as **50% of time spent on Amazon and Netflix** in Europe could be on non-English language shows by 2030. And if we narrow down our focus on the UK and US, our

Zeitgeist data from November shows two-thirds watch foreign-language content. Currently, this trend is primarily associated with shows like the South Korean TV series *Squid Game* or the Spanish drama *Money Heist* which took the world by storm; but Japanese content is where brands’ attention should go next.

Content from Japan is the most popular non-local media people in both the UK and US consume, and second in China, India, and Brazil. **Netflix** is already eyeing up Japanese content for its next wave of non-English language originals, while **Sony** is betting big on Japan’s anime industry.

Most popular non-local media consumed

Ranking of the most popular foreign media (TV, books, films, music) from the following countries (excluding UK/US media)

6

	#1	#2
Japan	South Korea	France
UK	Japan	France
Germany	France	Scandinavia
China	South Korea	Japan
Italy	Spain	France
France	Spain	South Korea
India	South Korea	Japan
USA	Japan	South Korea
Brazil	Spain	Japan

GWI Zeitgeist November 2021 9,913 foreign-language content viewers aged 16-64 in 9 markets

A word from our partner



SIMON KEMP
FOUNDER & CEO, KEPIOS

“

Today’s audiences are actively seeking out content that transcends borders. From the popularity of non-English-language TV shows like *Squid Game* and *Lupin*, to global music hits like Despacito and Gangnam Style – and even the rise in use of online translation tools – it’s clear people all over the world have embraced cultural and linguistic diversity. These changes have implications for marketing, from redefining audiences’ content expectations, to prompting a rethink of what “localization” might mean for international campaigns, and even re-shaping product distribution strategies.



02

Video views



The pull of social

Social media has cemented its position as a go-to source for entertainment. Whether it's a meme, viral clip, dance trends, or how-to videos, there's something for everyone.

Close to 40% of Gen Z use social media to find content (e.g. articles, shows, videos), and a quarter of baby boomers do the same – growing by 5% since Q4 2020 for the latter group. At the same time, watching livestreams as a reason for using social media has grown by 9% among boomers, and declined among Gen Z by 5%.

Fueled by the popularity of creative, visual, video-heavy platforms like Instagram and TikTok, more and more consumers are flocking to these apps to consume and create content. Close to 80% of Gen Z TikTok users outside of

China turn to the platform to find funny/entertaining content, only dropping to 74% among baby boomers. It's also the fastest-growing platform across all generations.

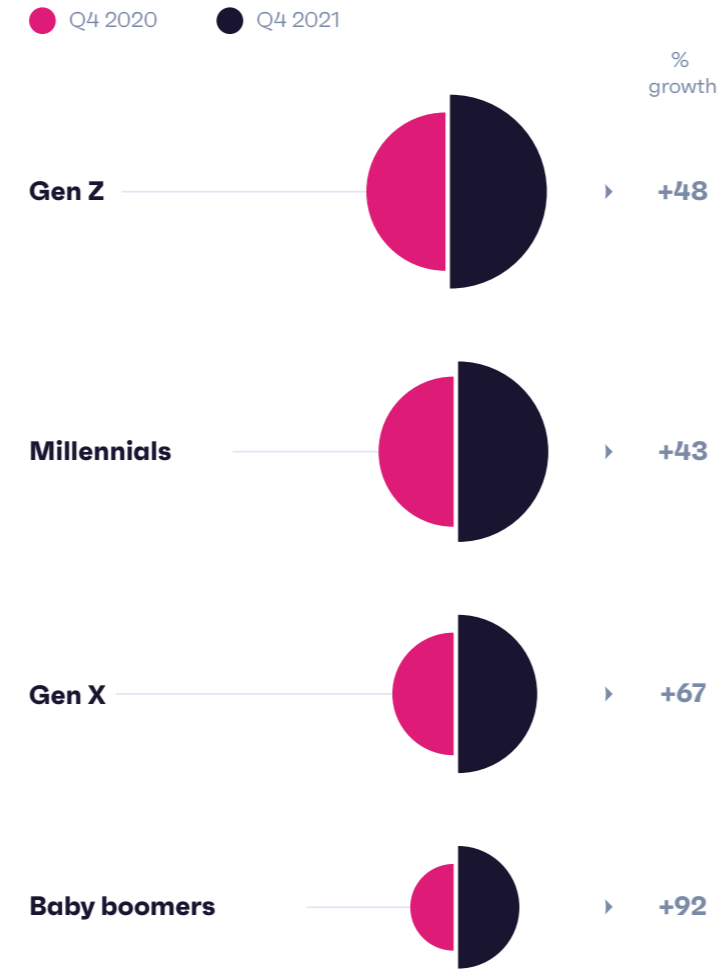
Instagram still very much holds a special place in the heart of Gen Zs though, with close to 70% turning to the platform for funny or entertaining content. This trails off massively for baby boomers, who instead prefer turning to Facebook for the fun stuff.

This all really underpins how there's serious appeal for entertaining content among older consumers too, on sites typically associated with younger counterparts. Brands marketing on the likes of TikTok should take note to ensure they're not leaving this valuable audience on the sidelines.

Usage of TikTok among baby boomers has doubled since Q4 2020

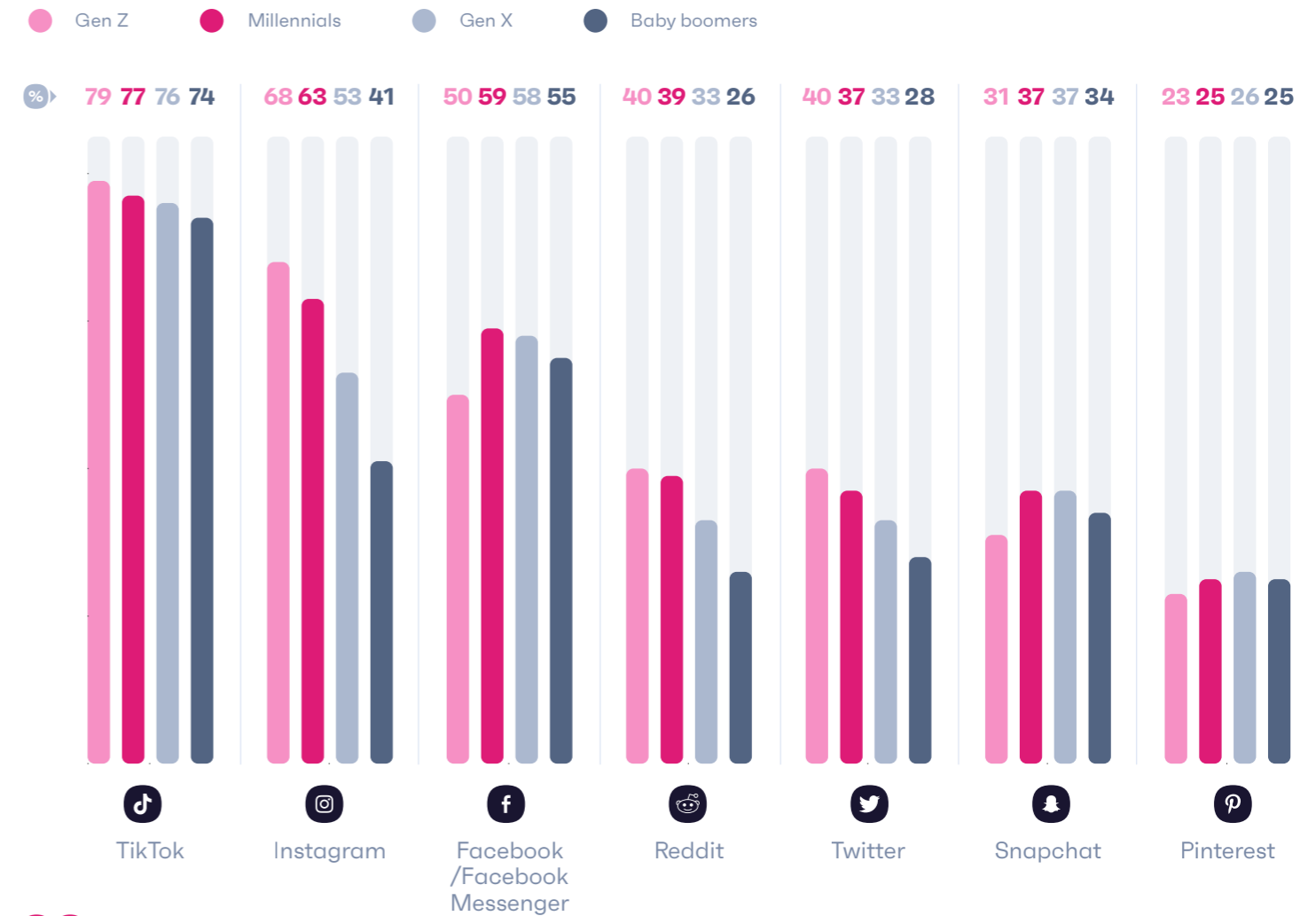
TikTok continues to make serious gains...

% outside China who use TikTok at least daily



...and nabs the top spot for entertaining content across all generations

% of platform users outside China who use these services to find funny/entertaining content



GW I Core Q4 2020 & Q4 2021 and GW I Core Q4 2021

356,794 internet users outside China aged 16-64 • 182,532 social media users outside China aged 16-64

Discover the biggest social trends in 2022
Download the report



You can't beat a good video

There's no denying the incredible appetite for video content, with TikTok, Instagram, and YouTube the driving forces behind this type of content.

Across all generations, short-form video content beats out long-form, with the former growing 5% among baby boomers since Q1 2021. TikTok may have led the way initially for this type of snackable content, but Instagram's Reels is quickly picking up speed in a very short space of time, growing 27% since Q4 2020. With consumers craving a more honest, less polished online experience, short-form is primed to give them what they want.

Some brands are leaning into this by partnering up with more niche creators on TikTok. Gucci, for instance, turned to **trainspotter Francis Bourgeois** to bring its collaboration with North Face to life – a bit of a departure from its typical creator collaborations. The

brand is aiming to tap into TikTok's increasing number of niche, playful sub-communities.

Short-form might be the preferred video content overall, but there's strong demand for long-form too, particularly among Gen Z. Just over 2 in 5 Gen Z say they've watched a longer video in the past week, which is not too far behind short-form. YouTube leads the way when it comes to longer content, with 82% of Gen Z engaging with the platform in the past month. TikTok is hot on its heels though, as it **expands maximum video length to 10 minutes.**

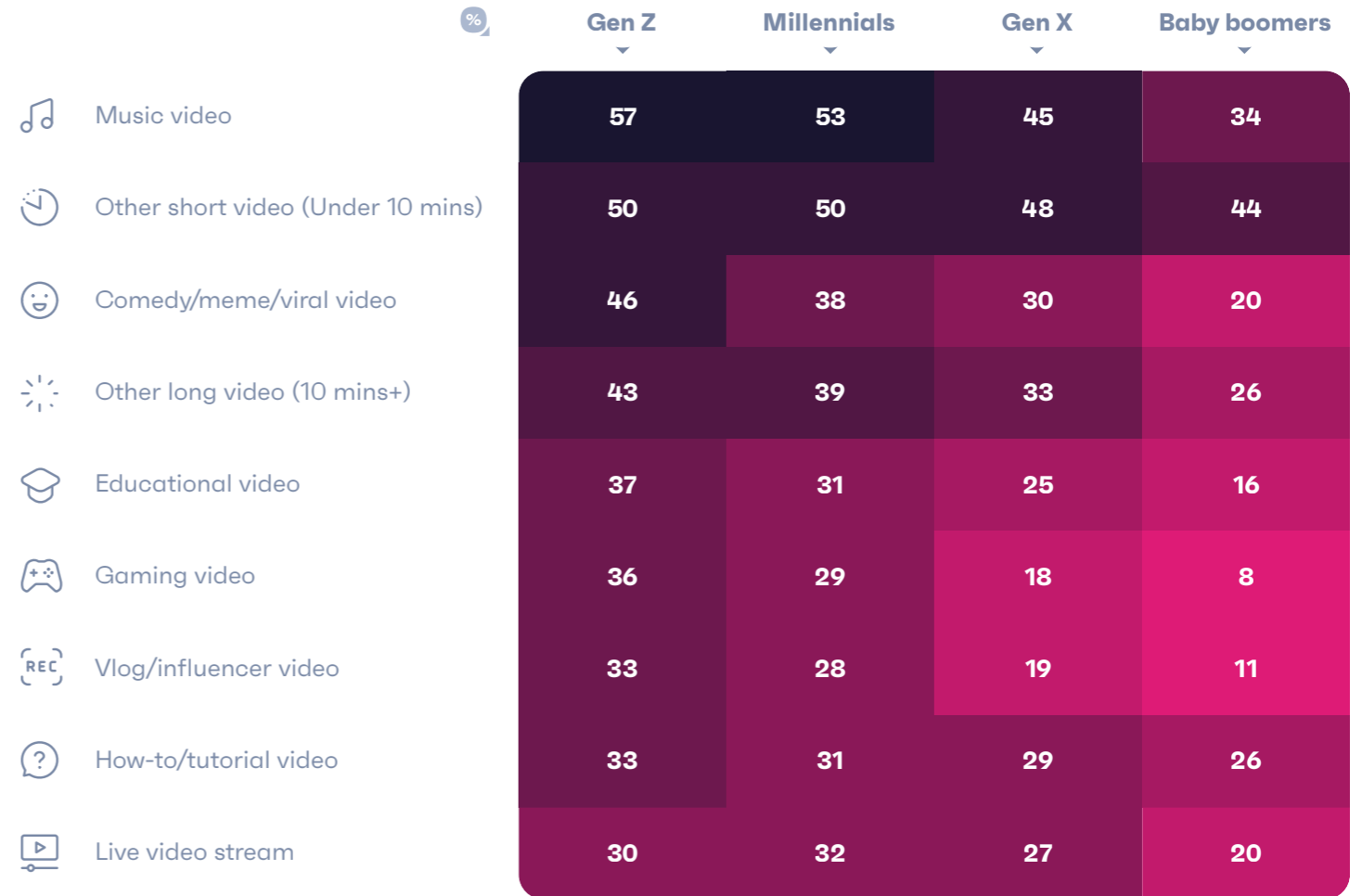
As services continue to battle it out to win consumers' attention, brands need to stay focused on tailoring and optimizing their video content experience to better meet consumers where they're at and do it in a way that's fresh, relevant, and gets consumers hyped up.

Going viral: Learning the language of the internet Big questions answered



Video is key for capturing attention

% who say they've watched the following via any device in the last week

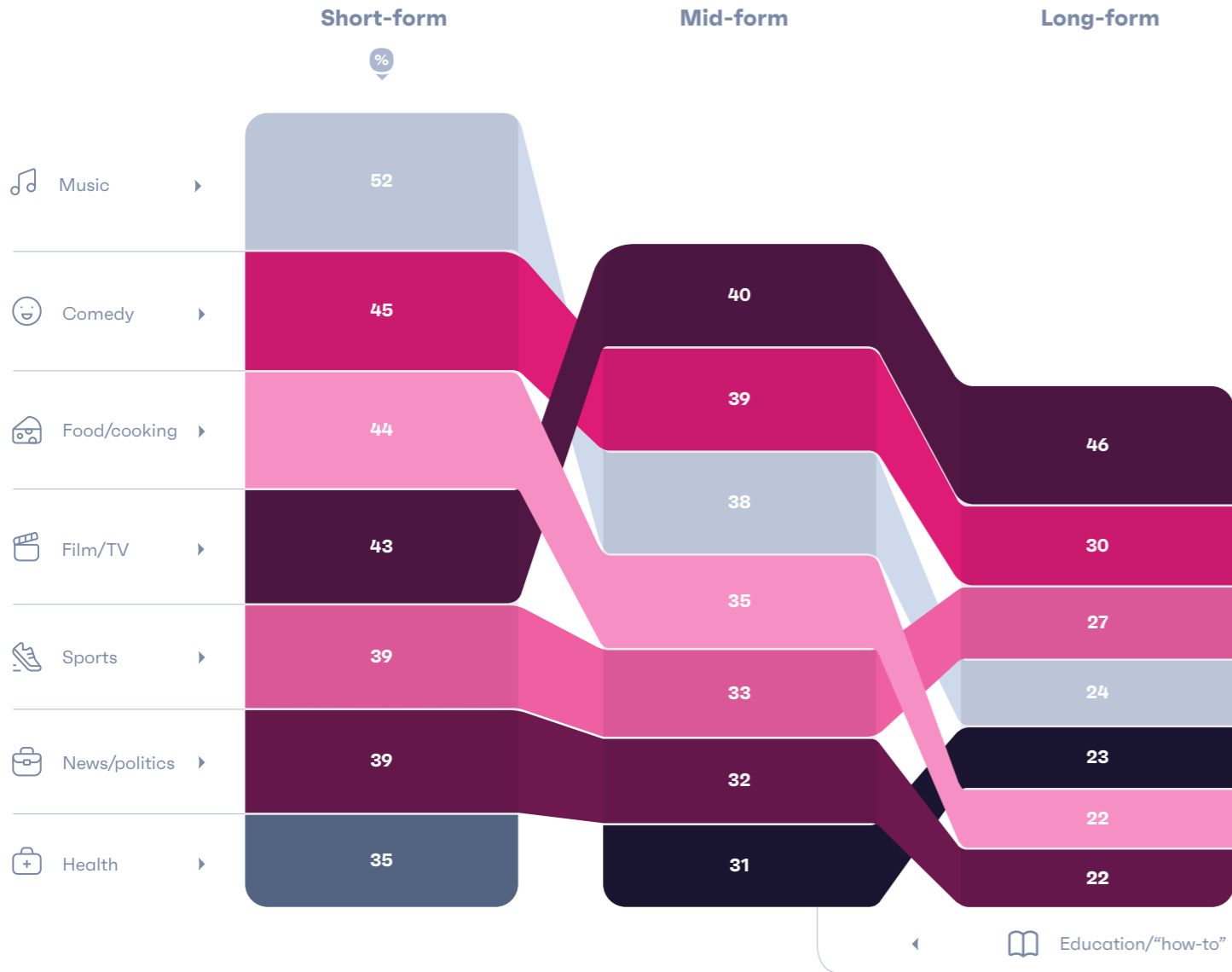


GW I Core Q4 2021 225,242 internet users aged 16-64

A snapshot of the top video genres

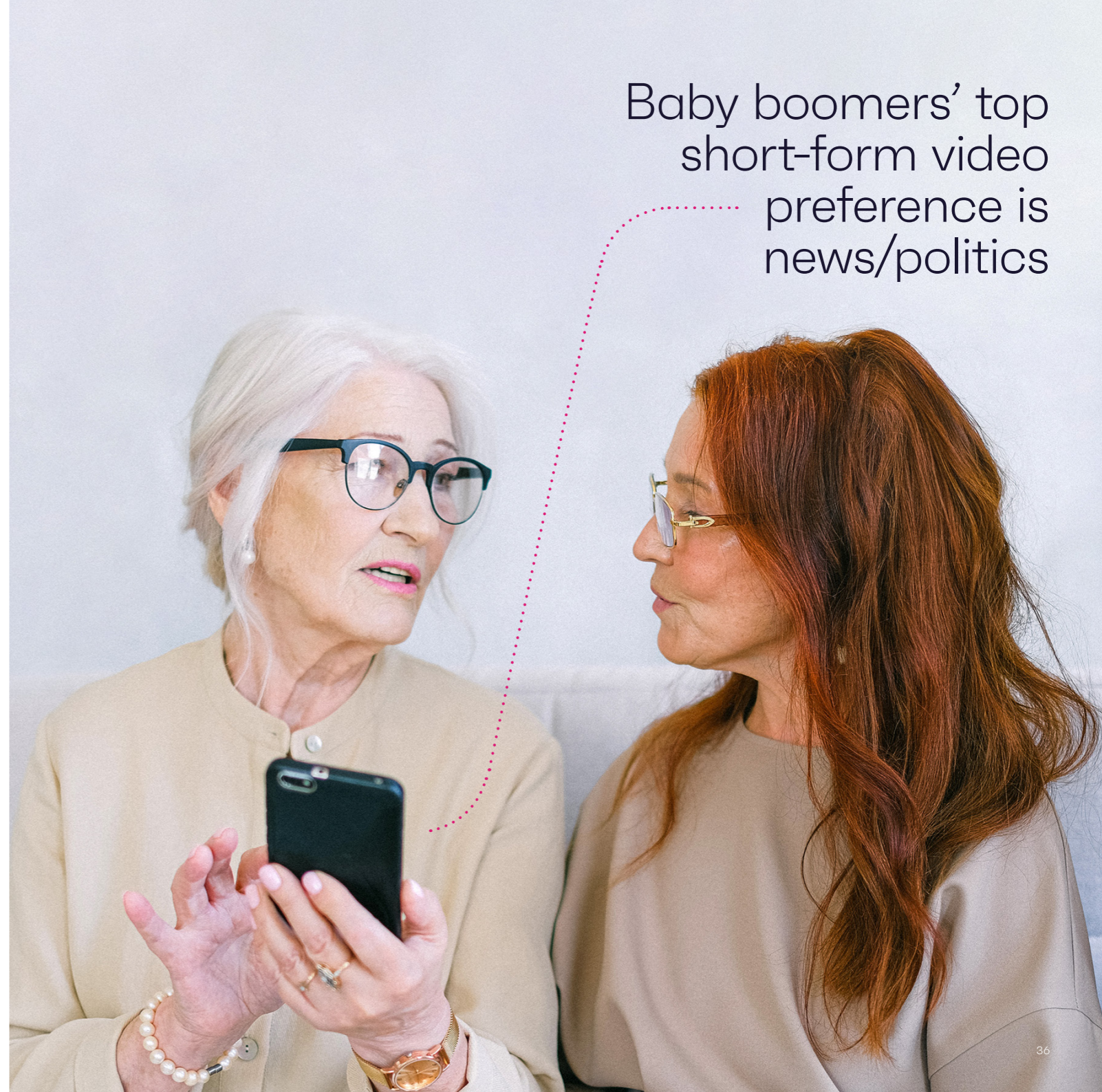
% who have watched the following in the last month

9



GWI Zeitgeist August 2021 10,903 internet users aged 16-64 in 8 markets

Video views



Baby boomers' top short-form video preference is news/politics

03

Audio insights

The evolution of music streaming and radio

Music has remained the most popular personal interest since we started tracking it in Q3 2018, and today it tops the charts in 21 of our 47 markets. The beauty of audio is that it can be consumed in combination with other media or behaviors and it often is. For example, 44% of fully-office based or hybrid workers say they listen to music while commuting; of them, 38% browse social media at the same time. In the context of an **attention recession** and screen fatigue, audio of any kind is gaining popularity among advertisers and

marketers. Spotify **reported** a 40% year-on-year growth in ad revenue in Q4 2021, which now accounts for 15% of its total revenue.

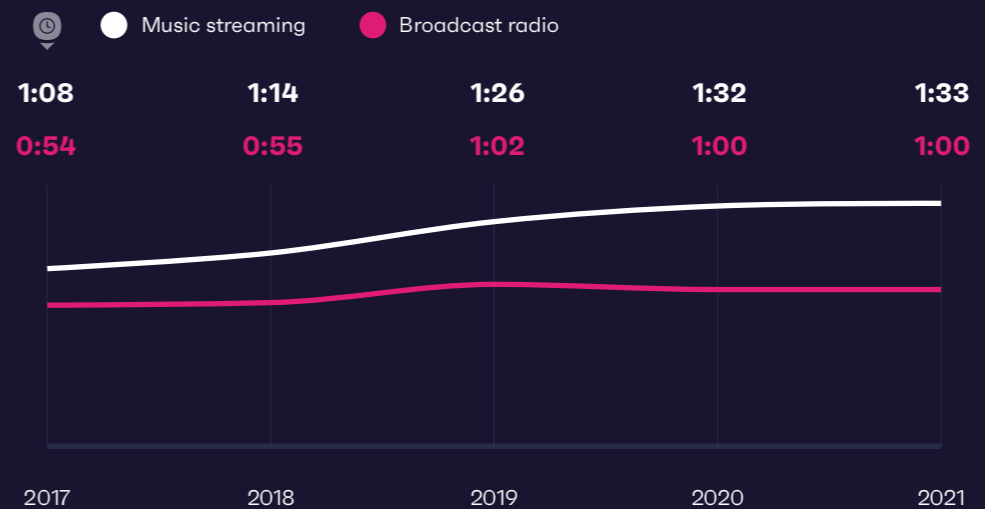
And although music streaming's growth has slowed down (like most other media) since the peak of the pandemic, in 2021 consumers still spent slightly longer on it per day than in 2020. However, it's likely we'll see time spent on music streaming start to plateau in 2022 as our most recent wave of research indicates a four-minute decline since the

peak in Q2 2021 (1h 31m vs 1h 35m). APAC will likely be driving this as the only region showing a drop between 2020 and 2021.

But the success of music streaming isn't coming at the expense of radio in the same way online TV can sometimes eat time away from traditional TV. Although time spent on music streaming now leads radio in 32 markets, the latter is still going strong, especially across most European markets and Japan, and it's worth investing into.

Time spent on music streaming services keeps growing

Average time spent per day on the following in h:mm

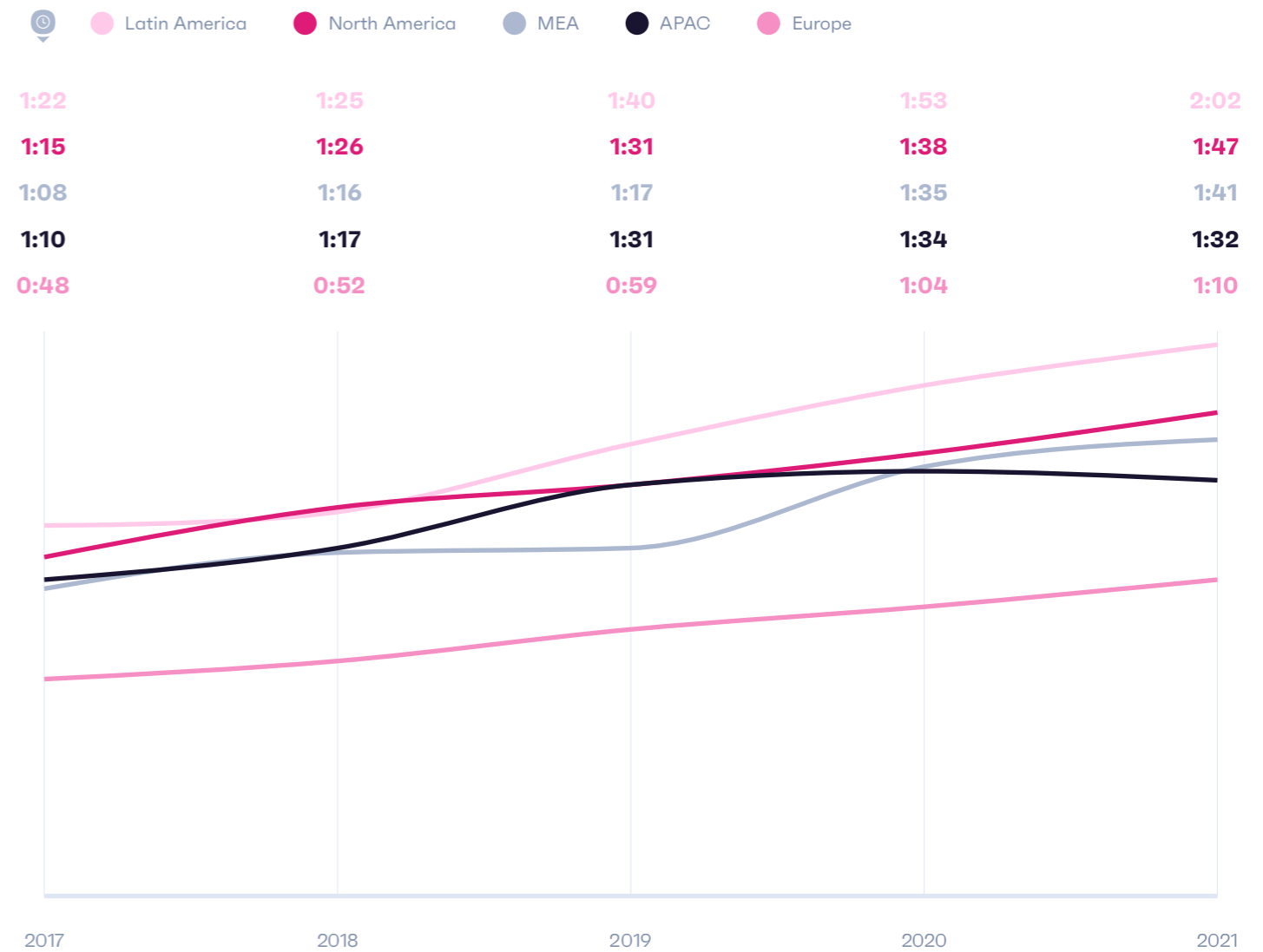


Music streaming takes up 45% of the total time consumers spend on audio every day



Music streaming continues to rise in all regions apart from APAC

Average time spent per day on music streaming in h:mm



GW I Core 2017-2021 (Averages of waves conducted between Q1 2017-Q4 2021) 3,289,311 internet users aged 16-64



The cross-generational appeal of music

In 2021, all generations spent more time on music streaming than radio except for boomers (aged 58-64). And it's not that they're listening to more radio than other generations, they're just spending much less time on both audio types altogether (1h 45m compared to 2h 18m for Gen X). However, as we covered in our **2021 Connecting the dots** report, boomers are starting to adopt digital behaviors beyond just scrolling on social media, which was a trend further boosted by the pandemic.

We see signs of that in the music-streaming space. There's been a 13% increase in boomers listening to music-streaming services each week in the space of one year alone. For marketers still not persuaded to move the needle toward digital audio, now's the time to craft campaigns to engage with the most affluent generation out there.

Boomers are the only generation left spending more time on radio than streaming

Average time spent per day in 2021 on the following (h:mm)



GW I Core 2021 (Averages of waves conducted between Q1 2021-Q4 2021) 782,581 internet users aged 16-64

As far as music genres are concerned, consumers care more about the time from which the music comes rather than its genre per se. 90s music, for example, has a true cross-generational appeal and is found within consumers' top three genres in each generation. Our data also shows music genres are roughly linked to the decade consumers were born or grew up in.

But this isn't the case among Gen Z. Hip-hop and 90s music are likely to strike the biggest chord with them, while 00s music ranks fifth. Whether through nostalgia or other marketing strategies, advertisers can safely bet on the golden age of music, especially when the most popular reason consumers give for listening is to remind them of good memories (55%).



Top 5 genres by generation

% who like listening to the following music genres



GWJ Core Q4 2021 221,608 internet users aged 16-64



By format, streaming remains the most popular – representing 83% of total revenues – but vinyl and CDs both made big gains, with vinyl passing \$1 billion in revenue for the first time in 35 years.

MITCH GLAZIER
CHAIRMAN AND CEO OF THE RIAA

Preferred audio content

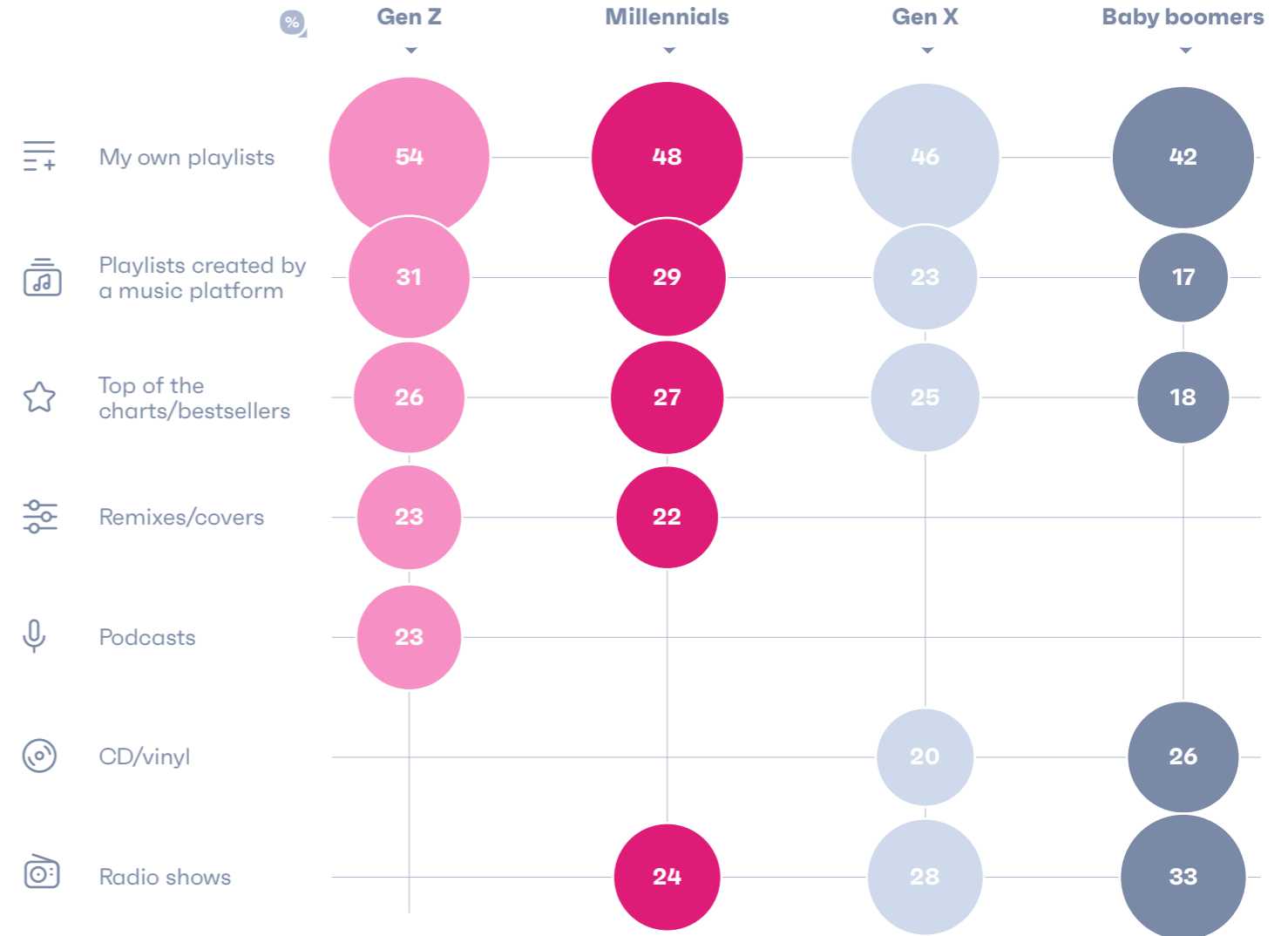
Across all demographic breaks and locations consumers prefer to listen to their own playlists (49% say this). The only exceptions are Austria, China, and Japan where radio shows, top of the charts, and CD/vinyl lead self-made playlists by a small margin, respectively. It's clear, people want to have all their favorites in one place and that's where they head first. This isn't to say there's no room for curation though. In fact, playlists created by music-streaming platforms as well as bestseller lists are among the top three preferred audio types for both Gen Z and millennials. Services should think about blending new recommendations with users' own playlists like Spotify's new "Enhance" feature. By giving people the option to

expand their playlists with personalized suggestions, the platform doesn't interfere with the curating experience, it amplifies it.

Physical releases in the form of CD/vinyl have also enjoyed a comeback of late and are especially popular among older generations and markets like Japan (35%), France (30%), and Greece (28%). According to the **Recording Industry Association of America (RIAA)**, in 2021 CD sales increased 48% year-on-year, while vinyl singles surged by 25%; and the fact that performers like **Taylor Swift** account for 7% of all CD sales in 2021 means it's also younger people behind the revival of physical music.

Self-made playlists come on top, but a degree of curation is still desired

% who most like to listen to the following (top 5 for each generation)

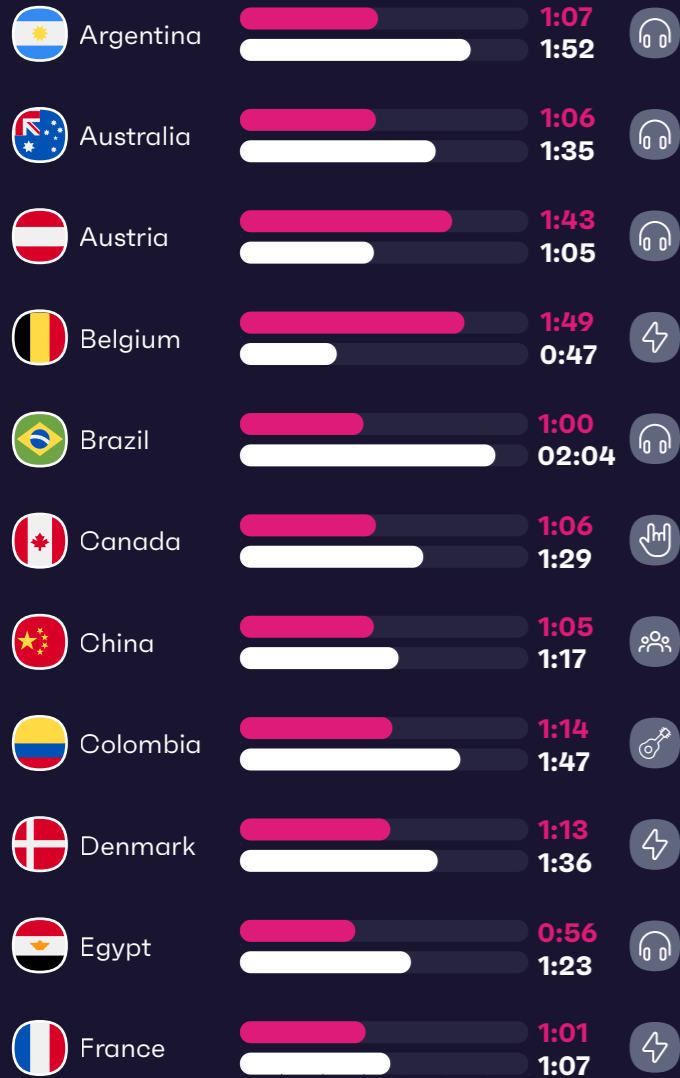


GWJ Core Q4 2021 221,608 internet users aged 16-64

Music listening by market

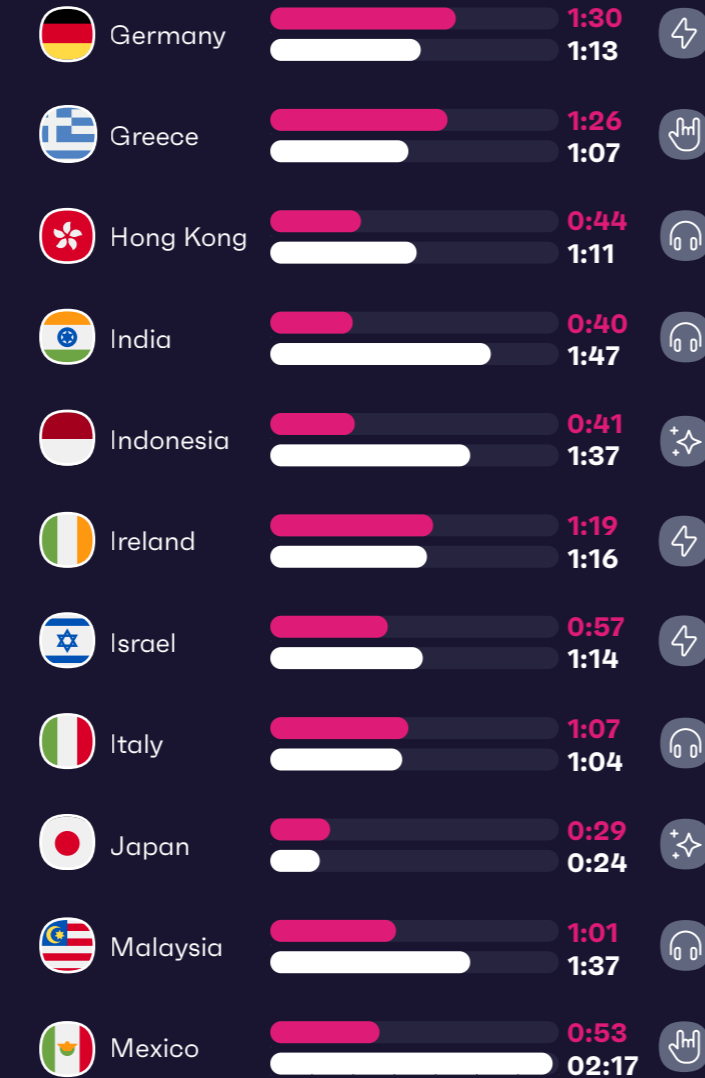
Average time spent per day listening to the radio/on music streaming services in h:mm

Radio
 Music streaming

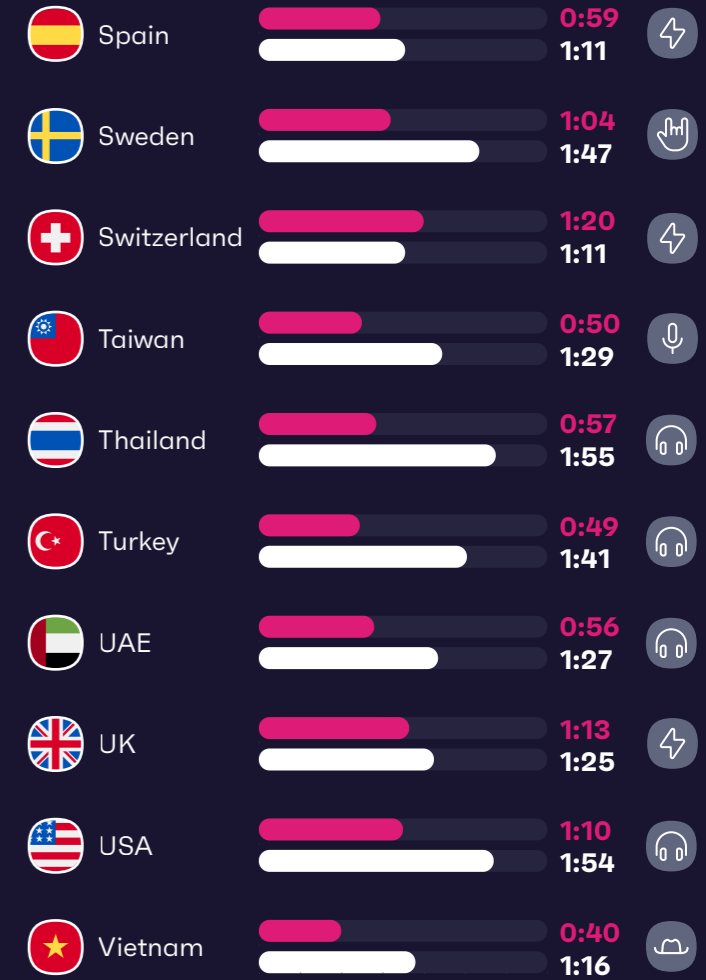
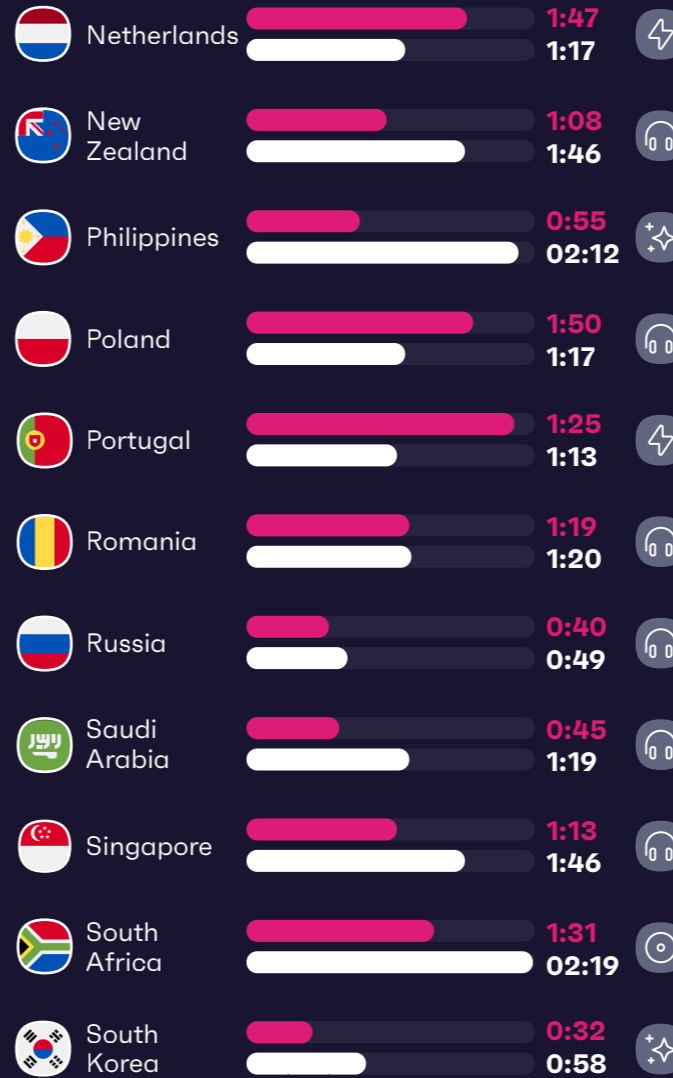


Top genres

80s
 90s
 Rock
 Asian pop
 R&B/soul

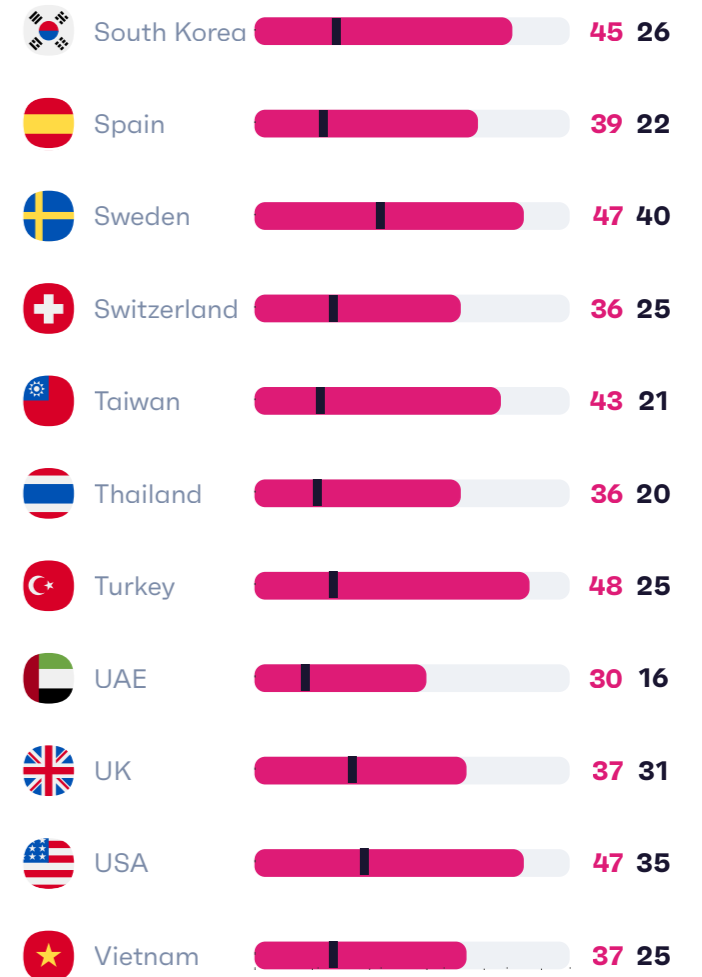
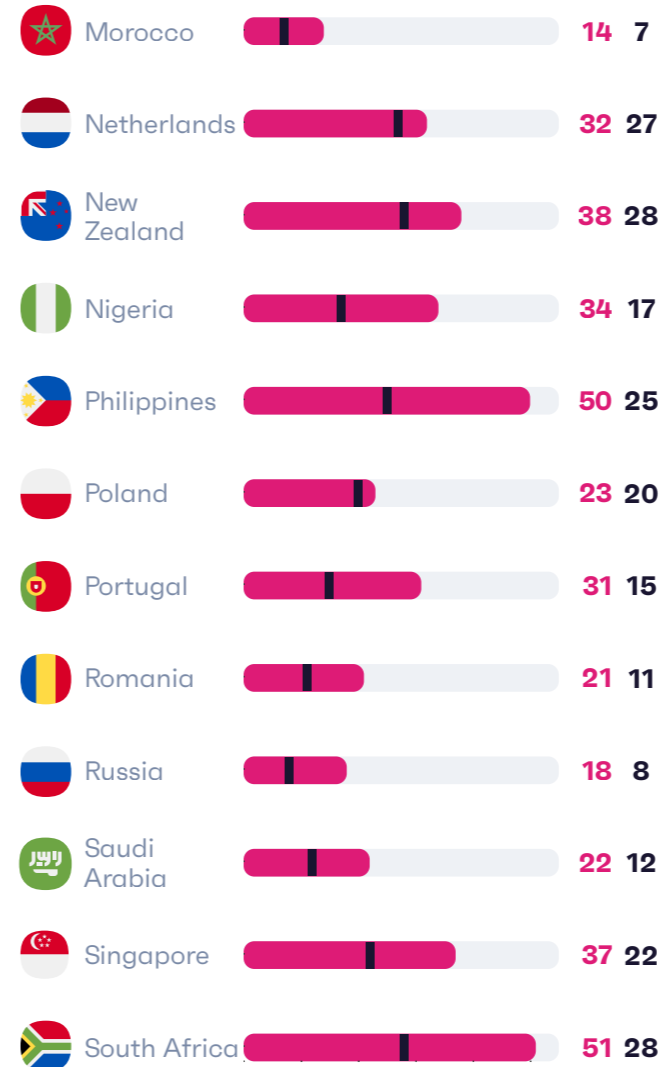
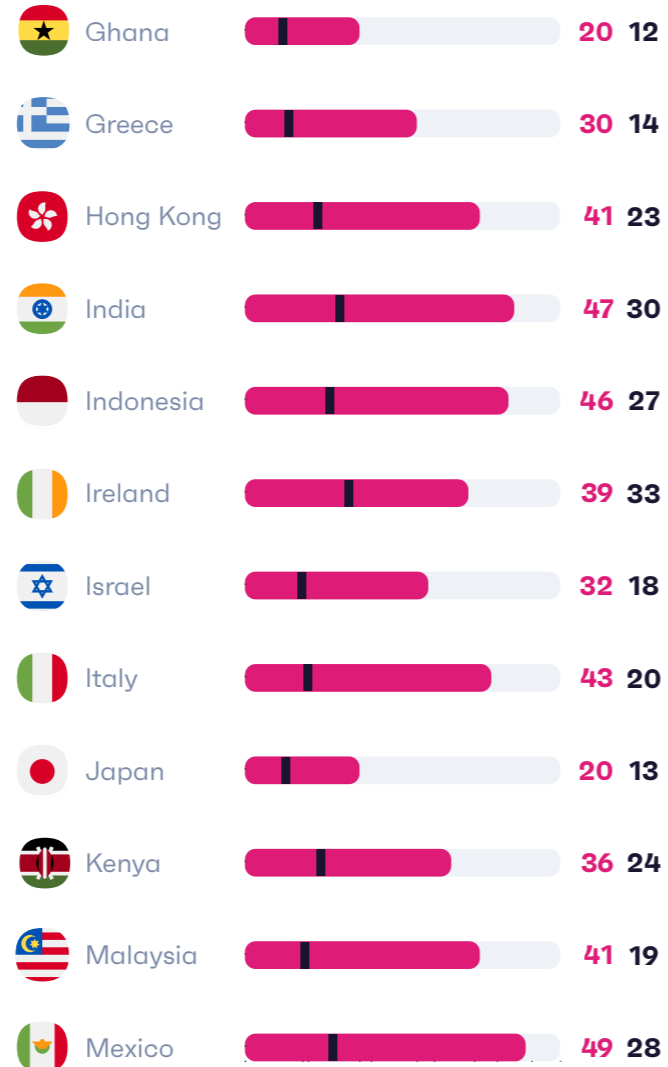
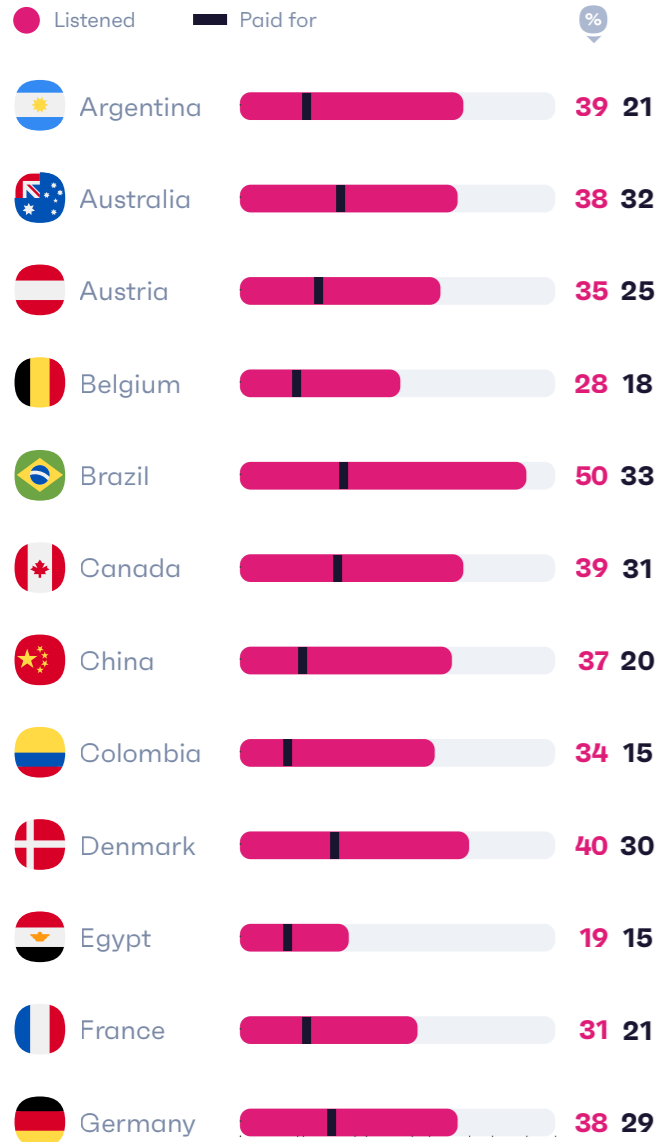


Pop/Top 40
 Singer-songwriter
 Country
 Latin



Please note we don't track time spent on media in Ghana, Kenya, Nigeria, and Morocco

% who have listened to a streaming service in the last week/
have paid for a music streaming service in the past month



GWJ Core Q4 2021 221,608 internet users aged 16-64



Who's about to win the streaming wars?

Similar to movie streaming, music streaming is a crowded space to say the least. Although usage is growing across most of the platforms in the chart, services aren't necessarily converting this growth into paid subscriptions. While 39% of consumers use music-streaming services weekly, only 24% pay for them. Usage of Spotify, for example, has doubled since 2017 but only 4 in every 10 users have a premium account – a figure that has remained more or less stable since 2018.

On top of the 1.5 million subscriber cancelations in Q1 2022 after Spotify **suspended** its service from Russia, the

platform could also be losing market share to competitors. We started tracking YouTube Music around the same time Spotify began struggling with subscriber growth. Since then, the share of people who have listened to music on YouTube has grown exponentially. In fact, it's become the second most popular service in terms of engagement after Spotify. Last year, YouTube surpassed **50 million subscribers** – which although impressive, is still a way to go to catch up with Spotify's **165 million premium** subscribers.

Amazon has the biggest competitive edge as the only service we track that

has more paid-for than unpaid users (67% vs 33%).

Deezer is used by only 7% of people globally, jumping to as much as 23% in Brazil; but it's also the only platform we track which keeps growing its premium users – from 32% in 2018 to 35% in 2021. Its **partnership** with UNiDAYS, which allows students to subscribe for half the price, has been a game-changer.

Ultimately, the players standing the biggest chance of winning the streaming wars will be those who invest heavily in podcasts and offer tools to measure campaign success – something we explore next.

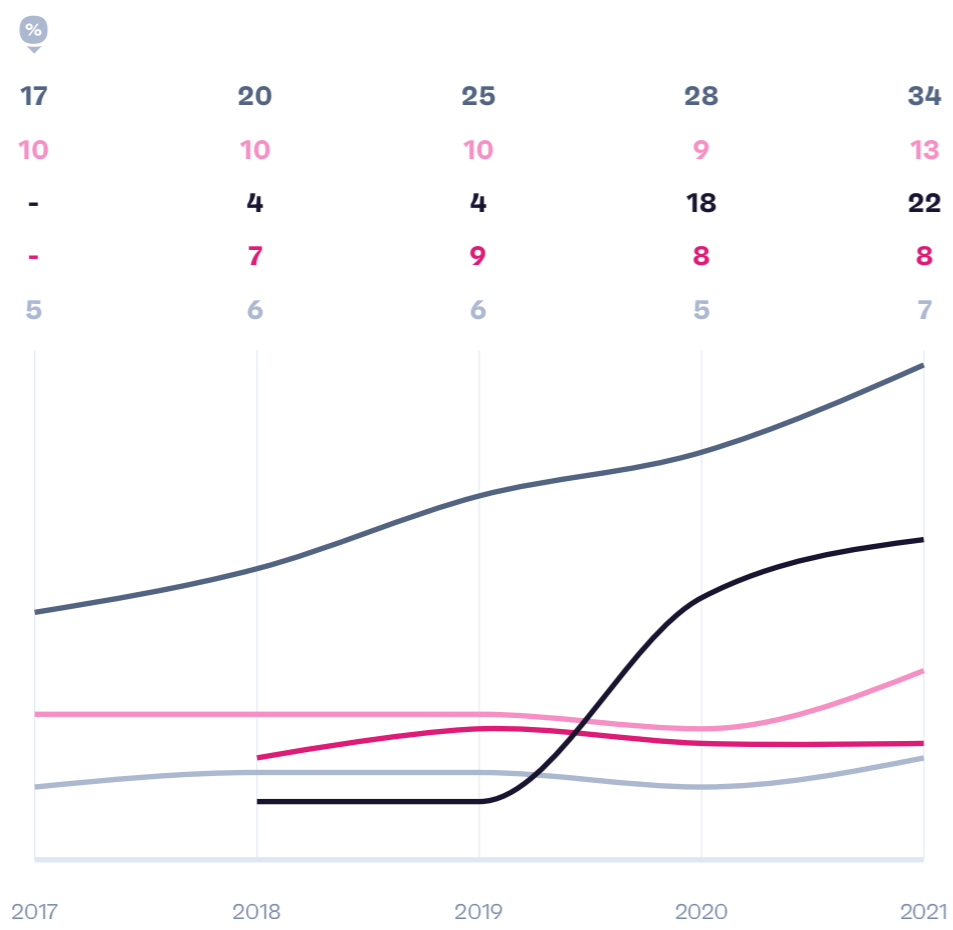
Usage is up but some subscriptions are flatlining

% of service users who say...

“ I have listened to /downloaded music from the following services in the last month

- Spotify
- Apple Music
- YouTube Music*
- Amazon Prime Music
- Deezer

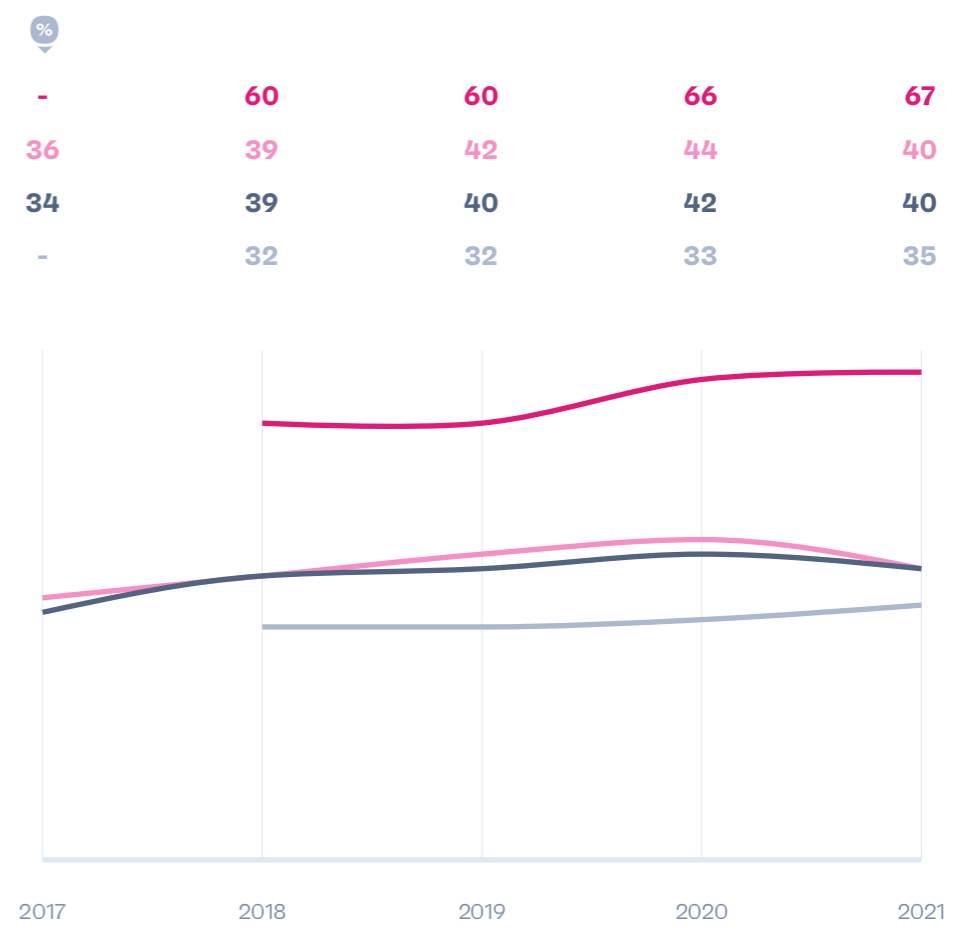
*Prior to 2020, YouTube Music was only available to respondents in five markets



“ I have a premium account

- Amazon Prime Music
- Apple Music
- Deezer (since Q4 2018)
- Spotify

GW I Core 2017-2021 (Averages of waves conducted between Q1 2017-Q4 2021)
2,880,554 internet users aged 16-64



Podcasts as a marketing channel

Podcasts have become hugely popular with consumers, with **Spotify** alone already home to around 4 million shows, up from half a million in 2019. Even during the pandemic when many thought engagement with podcasts would decline due to the lack of commuting, it continued to grow. In Q2 2020, consumers spent an average of 59 minutes a day listening to podcasts. To put this in perspective, it's on par with radio and just 16 minutes behind time spent on games consoles.

Like other media, engagement with podcasts has since gone back to pre-pandemic levels of around 54 minutes a day, but it's still 20% of

consumers who listen to them weekly and 19% who say they most like to listen to podcasts. As engagement is still relatively lower than other audio types, podcasts allow for a breakout success on a low budget; this makes it a lucrative opportunity for both creative and marketing efforts. Big players like LinkedIn, for example, are only now **entering** this space, while Spotify is making **strategic moves** toward maximizing the value of the podcast medium for marketers.

For the past couple of years the industry has been trying to **move away** from host-read ads to inserting programmatic ads to drive revenue at scale.

But the truth is monetizing podcasts is still a challenge for many and there's not much clarity out there on how ads during podcasts are perceived. In fact, our Zeitgeist data across 9 markets suggests automated ads might be putting listeners off. Over a third don't really like ads for various reasons, the most common being they interrupt the conversation (18% say this); but at the same time, over a quarter want promotions which blend in with the host's style and a fifth would like a monetary benefit. In other words, ads in podcasts won't appeal to everyone but it's a safer bet if they're host-read, relevant to the podcast theme, or if they can win the listener over with a discount.

Monetizing podcasts through ads

% of podcast listeners across 9 markets who feel the following ways about ads in podcasts



GWJ Zeitgeist December 2021

5,125 podcast listeners aged 16-64 in 9 markets



04 Gaming findings

The battle for gamers' attention

As with some other forms of media, the pandemic-induced gaming boom has seen a slight slowdown as people return to their normal routines. In Q2 2020, when the pandemic first hit, 87% of consumers said they play games on any device – this has steadily declined and now stands at 83%.

It's still a huge portion of consumers who play games though, and it's been making serious gains among older consumers too. Pre-pandemic in Q4 2019, 56% of baby boomers said they play games via any device, climbing to 65% today. The portion of women who play games has also increased (+5%), with almost as many women playing games as men – 85% vs 81%, respectively. This really underpins just how diverse the gaming audience is. And services like **Paidia**, a new online gaming community, are popping up to cater to this audience.

Mobiles have been the driving force behind increased adoption, growing by 8% since 2016. In regions like North America and Latin America, mobiles continue to pull in the most gamers – growing by 20% and 11%, respectively since Q4

2019. Alongside this, free-to-play games have hooked more people in – 34% of gamers have played/ downloaded a free-to-play game in the last month, compared to 18% who've purchased a physical game or one from an online store.

Netflix clearly recognizes the **potential of mobile gaming** judging by its acquisition of Next Games, a Finnish mobile gaming company. With one eye firmly set on building out its gaming strategy, it'll be one to watch as platforms find ways to stand out in an ever-cluttered space. It's also another sign that **gaming and other forms of entertainment** are becoming increasingly blurred.

On the other hand, usage of PC/laptops to game has steadily declined over the years, dropping by 39% since 2016. Meanwhile, usage of consoles has remained pretty stable overall since 2019. North America's the exception though, with usage increasing by 14% since Q4 2019. While this is reassuring news to a degree, it's also proving difficult to meet demand as developers continue to face hardware supply chain issues.

A glance at gaming devices around the world

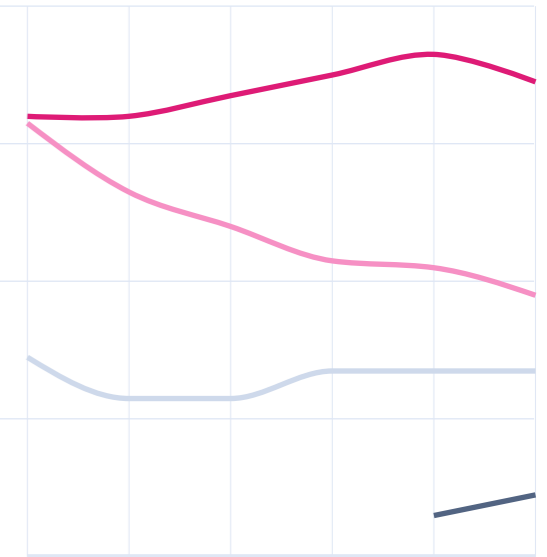
% in each region who use the following devices to play games

	North America	Europe	Latin America	APAC	MEA
Any device	83	80	90	83	87
Smartphone	65	60	75	68	72
PC/Laptop	31	40	43	36	34
Games console	39	28	42	20	21
VR headset	7	4	5	10	6

Mobile continues to dominate, but don't count consoles out

% who play games on the following devices

	2016	2017	2018	2019	2020	2021
Any device	64	64	67	70	73	69
Smartphone	63	53	48	43	42	38
PC/Laptop	29	23	23	27	27	27
Games console	-	-	-	-	6	9



GWII Core Q4 2021 & GWII Core 2016-2021 (Averages of waves conducted between Q1 2016-Q4 2021)

225,242 internet users aged 16-64 (Q4 2021) • 3,166,376 internet users aged 16-64 (2016-2021)

Almost as
many women
are gamers
as men



Beyond gameplay

Video streaming services like Twitch and YouTube, along with other social media platforms play a massive role in extending the gaming experience. Just over 40% of Gen Z gamers outside of China say they watch gaming streams on Twitch or YouTube – 13 percentage points ahead of everyone else. These sites also enable gamers to be creators in their own right, with 15% of this group saying they upload their own gaming footage to video sharing sites. YouTube is the most popular video streaming site across all generations, so there's huge potential to connect with gamers of all ages. It's also the top social media platform gamers visit for information and content.

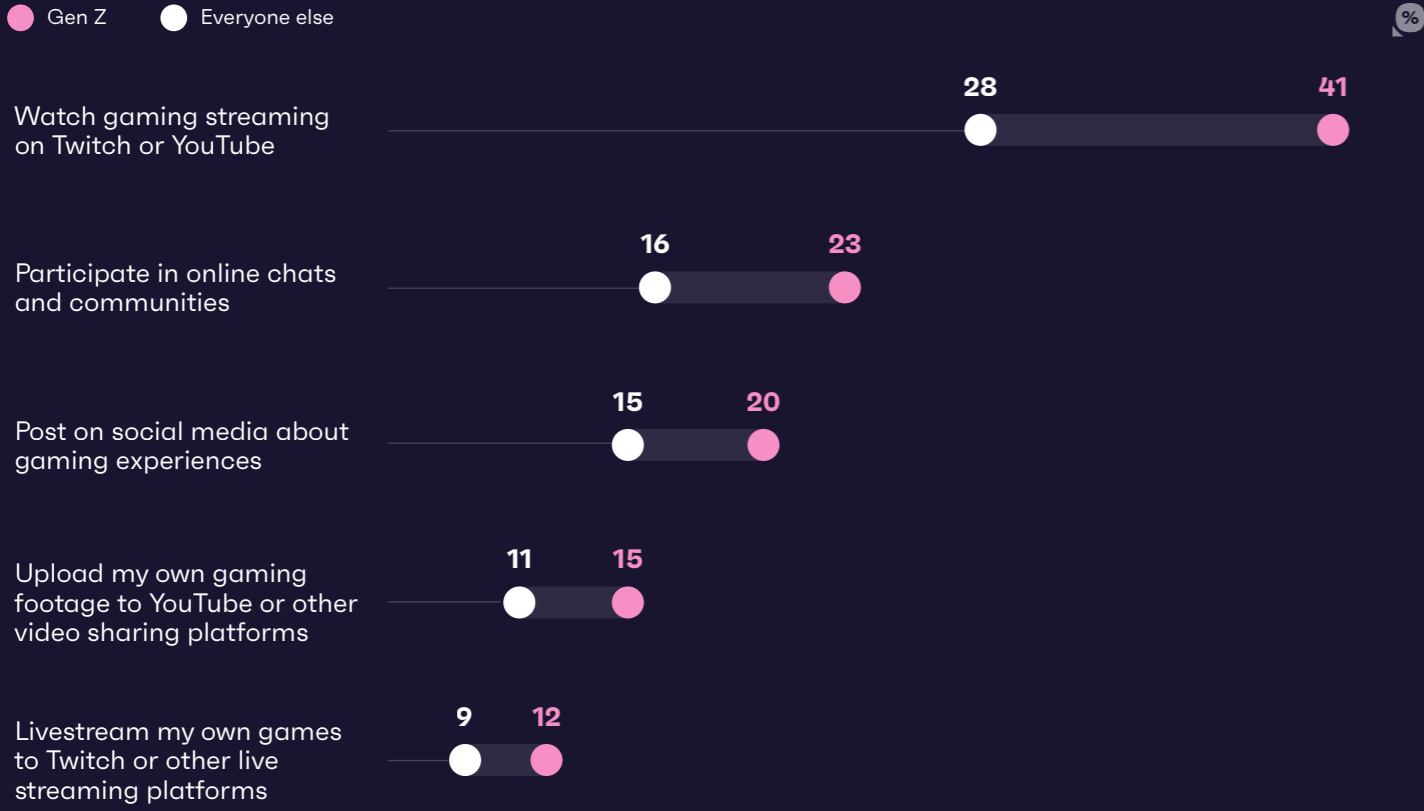
The appeal in these platforms is heavily tied to their community-centric nature, allowing gamers to connect with other players, streamers, or brands. Around 1 in 4 Gen Z gamers say they participate in online chats and communities, signaling their need to feel involved and be part of a close-knit fandom. It's also likely why more people are turning to services like Discord, with

monthly usage among gamers growing by 15% since Q4 2020 outside of China. TikTok created its **own Discord** that even includes a “game room”, highlighting TikTok's **growing interest in gaming**. Gaming is one of the **app's top performing categories in 2021**, so it's little wonder why it's edging further into this space.

Notably, watching gaming streams is also something that's diversified, with a third of female Gen Z gamers outside of China saying they do this. The popularity of female streamers like **Pokimane**, who has millions of Twitch fans, is helping to shift the narrative around what it looks like to be a gamer. More **beauty brands** are getting in on the action, as they realize that's increasingly where their consumers are at. Wendy's is a great example of how a brand **successfully gets involved in gaming**, but it's not always plain-sailing. Understanding and **listening to gamers** is the most important first step in crafting a campaign that lands. Until brands and marketers have reached that point, they should hold fire.

Being part of the wider gaming experience is important for younger gamers

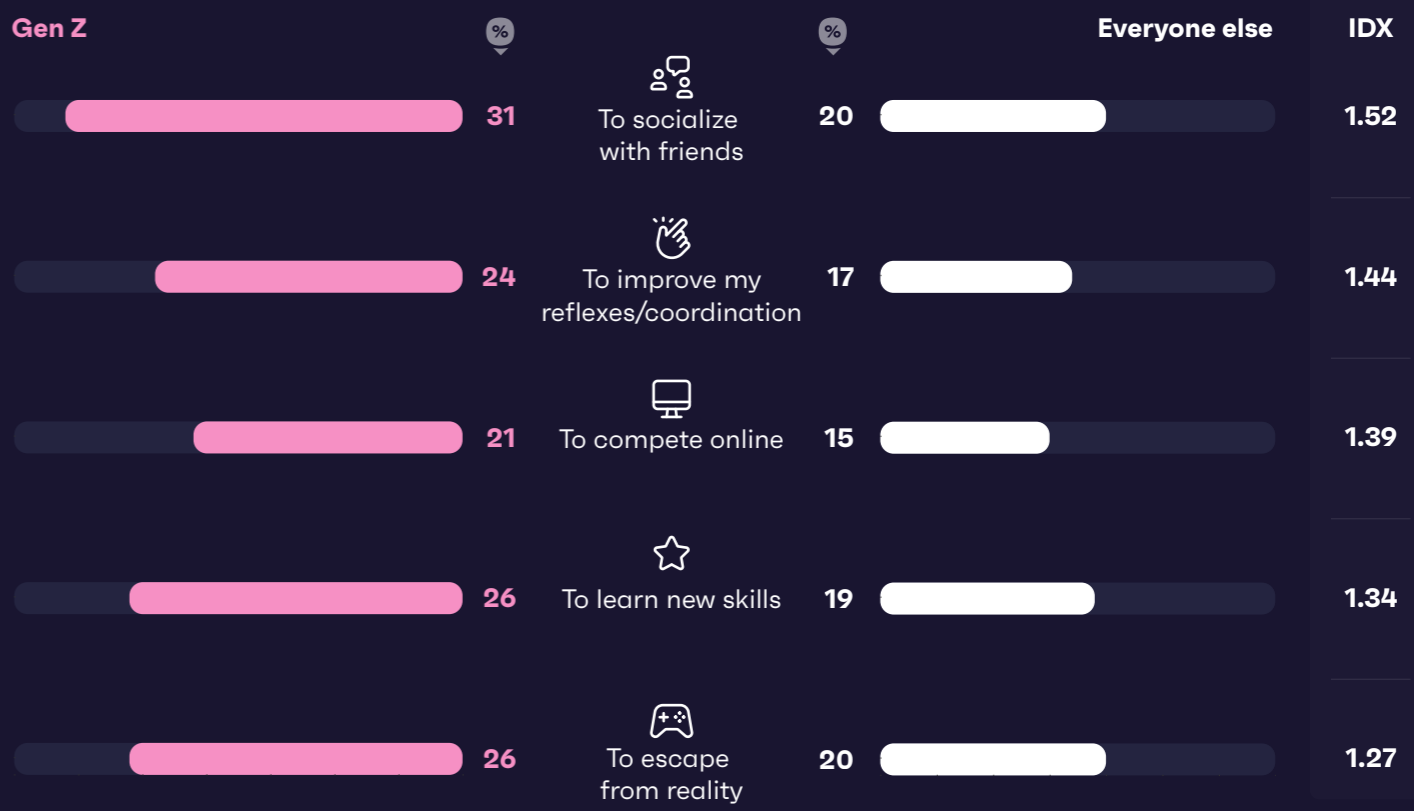
% who say they do the following



Please note this data excludes China

The social appeal of gaming stands out for Gen Z

% who say the following are their main reasons for gaming (sorted by over-index against everyone else)



GWl Gaming Q4 2021 4,167 Gen Z gamers aged 16-24 & 23,873 non-Gen Z aged 25-64 in 15 markets

Gaming and the metaverse

Talk about the metaverse is everywhere. While it's still early days in what it'll actually look like, and it'll no doubt differ by company, there's some consensus that it'll be a **shared virtual space** focused on social connection. And many tech, media, and gaming companies – including Disney, *Roblox*, and Meta – have set their sights on getting an early advantage.

Gaming has been nicknamed the **“parent to the metaverse”**. It's already heavily rooted in community, immersion, collaboration, and creativity; all of which are essential components of unlocking the full potential of the metaverse. Games like *Fortnite* and *Second Life* have already shown some of the social elements of the metaverse, where users have their own personal avatar and interact with others in virtual worlds. Virtual reality is also a building block of the metaverse, something that's gaining momentum among consumers – 1 in 10 in APAC use a VR headset to play games, up by 63% since Q2 2020. But the first real modern metaverse is yet to take shape, and it's anyone's guess about what it'll look like.

From our Zeitgeist research in November 2021, consumer awareness of the metaverse was pretty split. Notably, over half of consumers said they're

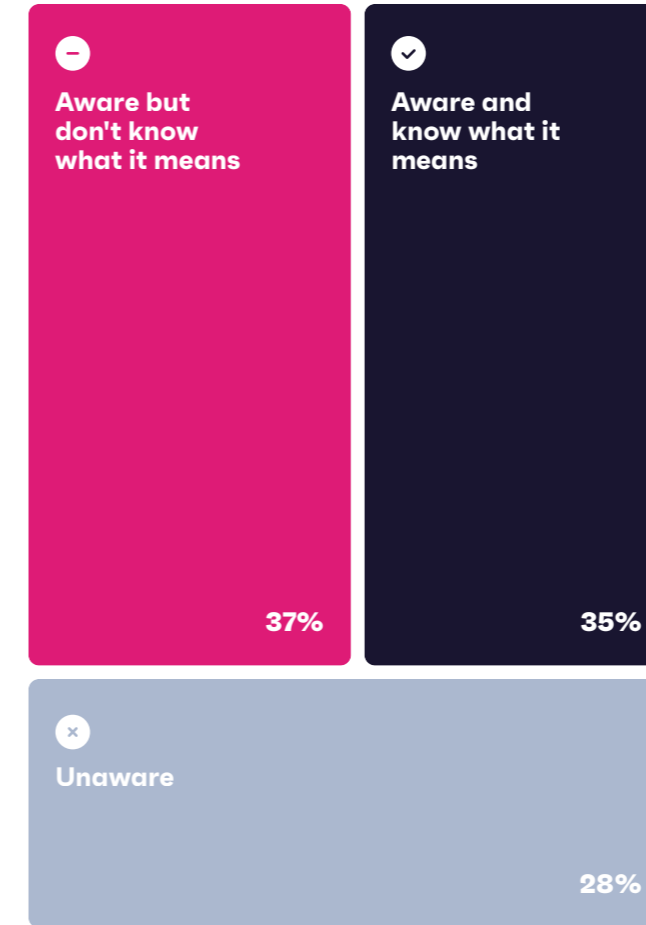
interested in participating in the metaverse, with considerable interest among those who didn't know what it was – showing the anticipation people have regardless of awareness.

Gaming looks set to benefit from the metaverse, with many believing it'll make online gaming more popular, make content creation easier, and improve the social aspect of gaming. This is something where services like Discord, TikTok, and Twitch come into play – spaces where users already value the sense of community and creativity they provide. The current conversation around the metaverse often raises more questions than answers, but there's one thing that's pretty clear: it's got a lot to live up to.

1 in 3 who've not heard of the metaverse before still want to be involved in it

Metaverse awareness is pretty split...

% of gamers who say they're aware/unaware of a metaverse



GWII Zeitgeist November 2021

10,193 gamers aged 16-64 in 9 markets • 4,845 gamers interested in participating in metaverse aged 16-64 in 9 markets

...but gaming looks set to benefit

% of gamers who say they're interested in participating in a metaverse because...



A word from our partner



SIMON KEMP
FOUNDER & CEO, KEPIOS

“ Given recent media attention, you’d be forgiven for thinking that “the metaverse” is all shiny and new. However, *Second Life* – the very definition of a metaverse – has already been around for almost two decades, while current favorites *Fortnite*, *Minecraft*, and *Roblox* all attract hundreds of millions of users. As a result, marketers can already look to the past to learn about what works in metaverses – and what doesn’t. One of the top lessons from those *Second Life* days: people in immersive virtual worlds aren’t very receptive to egocentric brand narratives. In the metaverse, you’re competing with people’s dreams, so you’ll need to go above and beyond “advertising” to capture and keep their attention.



05

Esports answers

The esport audience 101

Esports continues to cement its status as a key form of entertainment. As it increasingly integrates into **pop culture**, more companies and investors are closely watching this space. Snoop Dogg announced in early 2022 that he's joining **FaZe Clan's team** as a content creator and board director. This is just one example of how esports has become tightly woven with gaming, media, and pop culture.

In the digital age, where real-time, public feedback can make or break a brand's reputation, it's never been more important to take a step back and understand this audience before wading into the world of esports.

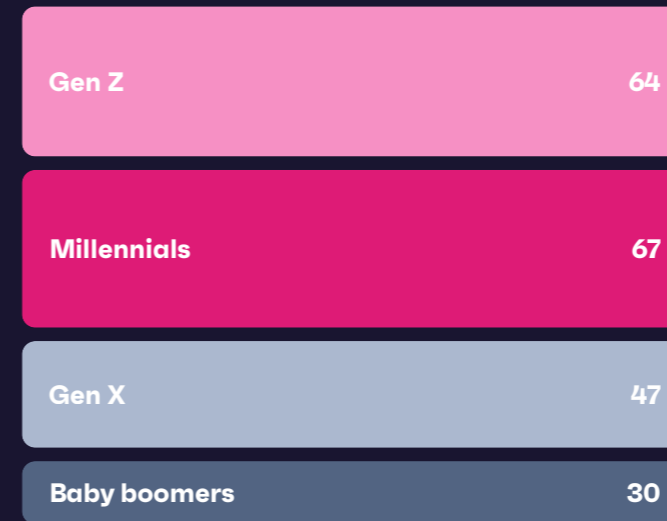
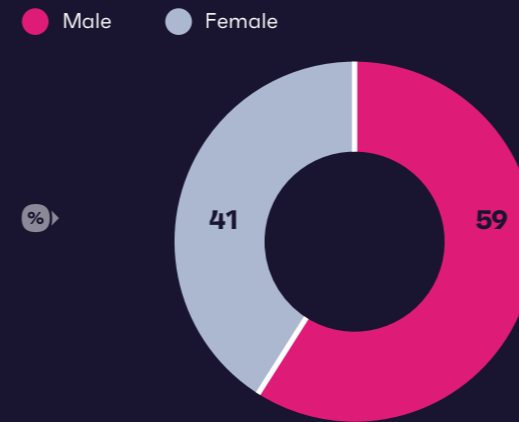
Similar to gaming, esports is also attracting attention from a diverse range of gamers. Just over 40% of female gamers are esports followers, which isn't miles behind their male counterparts at 59%. Yet, on the competitive front, **female**

esports players are left behind when it comes to earnings, as the industry struggles with stamping out sexism and creating an even-playing field that's supportive and welcoming to all. There's clearly some way to go, but with the right progress like **creating non-all male teams** and leveling the prize winnings, we'll likely see more female fans in this space.

While younger gamers are unsurprisingly bigger followers of esports, older generations really shouldn't be counted out. Close to half of Gen X gamers and close to a third of baby boomer gamers are esports followers – both sizable portions of the gaming audience. It's worth noting that this differs a lot by market, with the biggest share of esports followers being in China and the Philippines, which already have a thriving esports scene. At the other end of the scale are countries like Japan, Canada, and France, where esports has yet to catch on like it has in other markets.

Who and where are esports followers?

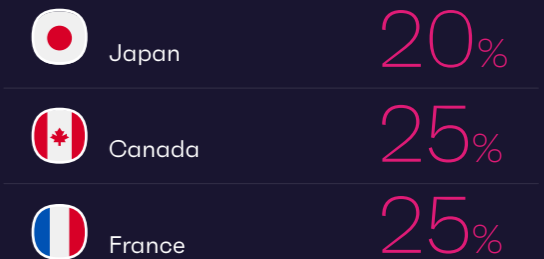
% of gamers who are esports followers*



Top markets



Bottom markets



*esports followers are defined as gamers who say they watch/follow one of the 30 esports leagues we track & who say they're extremely/very/quite interested in esports

Want to know
how to reach baby
boomers? **Find out
more here**



Globally, Gen Zs are more likely to watch esports tournaments than they are to watch the NBA, the NFL, the UEFA Euros, or Formula 1

How to reach esports followers

The esports audience, like gaming, has many different sub-groups that vary by franchise, genre, and platforms. Our **gaming dataset** allows companies to understand their audience to a very fine level.

Here's a snapshot of must-know traits that make this audience stand out from the average gamer:

Community is everything

It's something that crops up time and time again, but it's really key for this audience. Around a quarter of esports followers want brands to run customer communities/forums – 21% more likely than the average gamer. The ability to connect with like-minded people from around the world is why the likes of Twitch remain unmatched in terms of fostering an engaging and immersive experience.

Up for the challenge

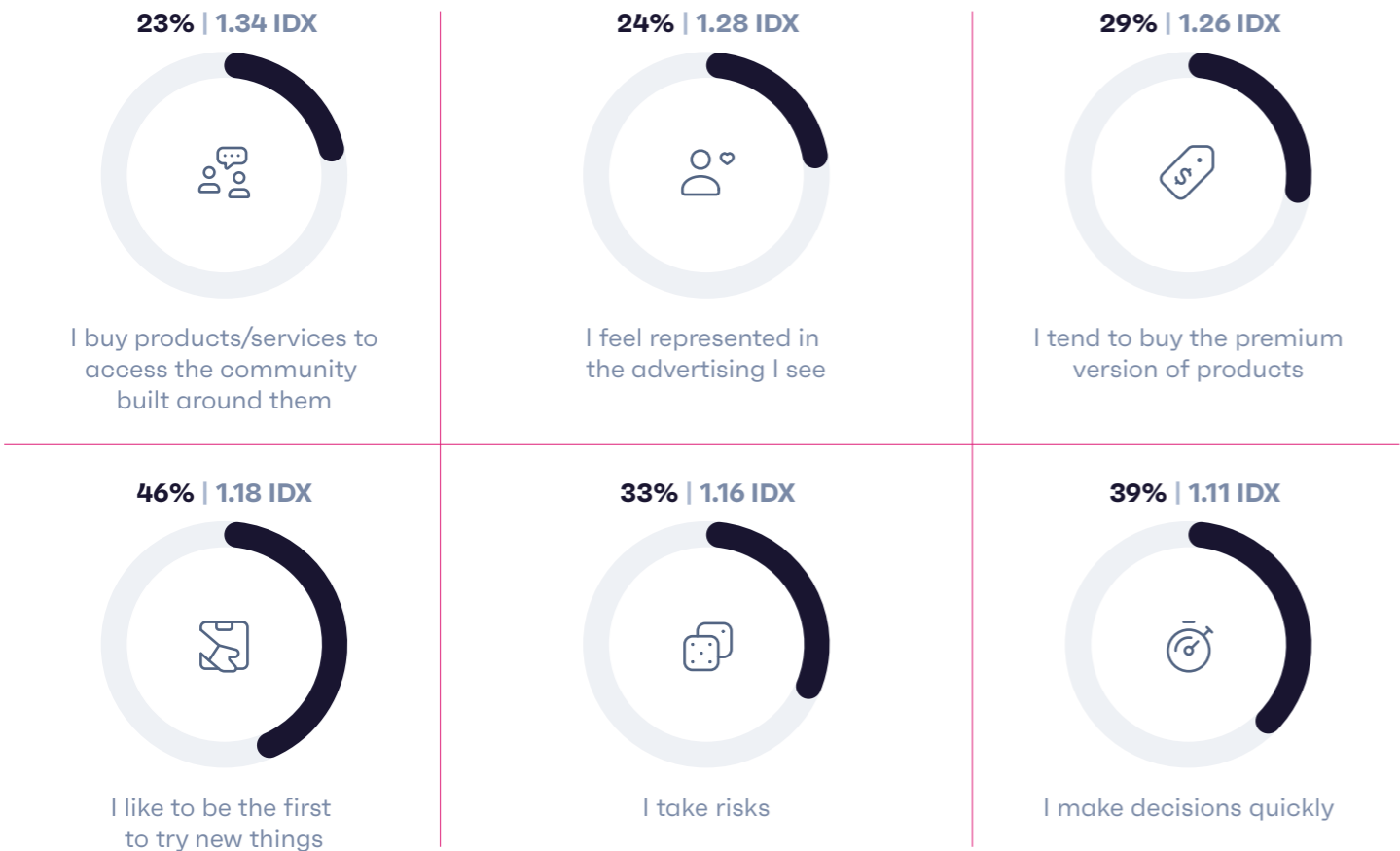
Esports followers are far more likely than the average gamer to say they play games to compete, to socialize with friends, to learn new skills, and for the challenge. Knowing this, brands will have more scope to build out more nuanced gamer profiles, and create more effective campaigns in turn.

Part of the inner circle

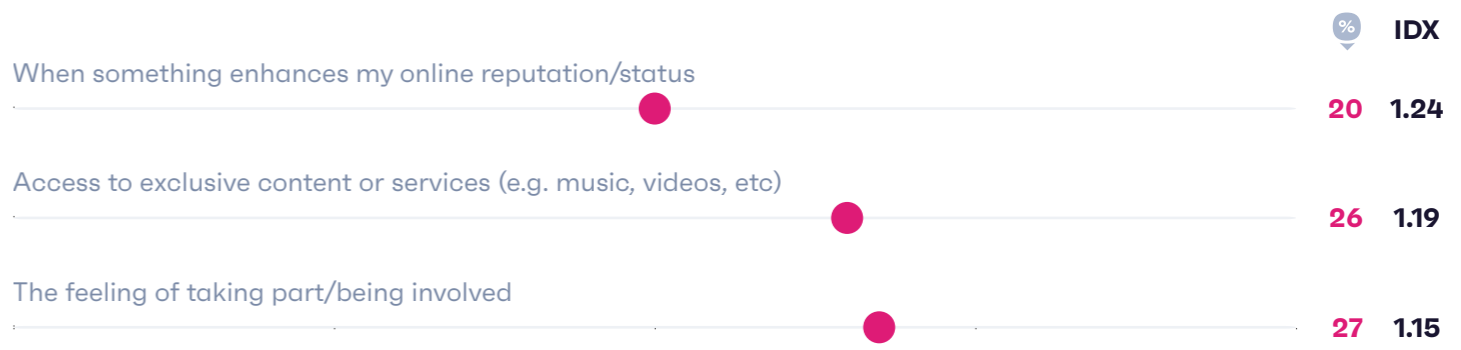
This group greatly values status, involvement, and exclusivity – they want that “insider knowledge”. They're 24% more likely to say they'll promote their favorite brand if it enhances their online reputation and 19% more likely to do so if they get access to exclusive content or services. This group's stand-out brand interaction in the past month is providing ideas for new product/design, 28% more likely than the average gamer. Turning fans into supporters of brands isn't an easy feat by any means, but involving them in the journey could be a winning tactic.

Community-oriented, daring, with a strong need for brand involvement

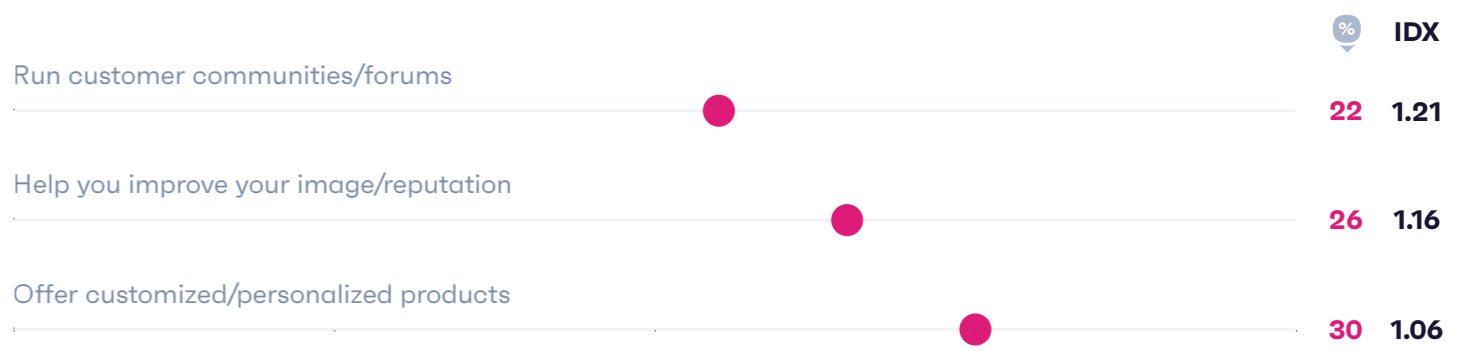
% of esports followers who say the following describe them (sorted by over-index)



% of esports followers who say these would motivate them to promote their favorite brand



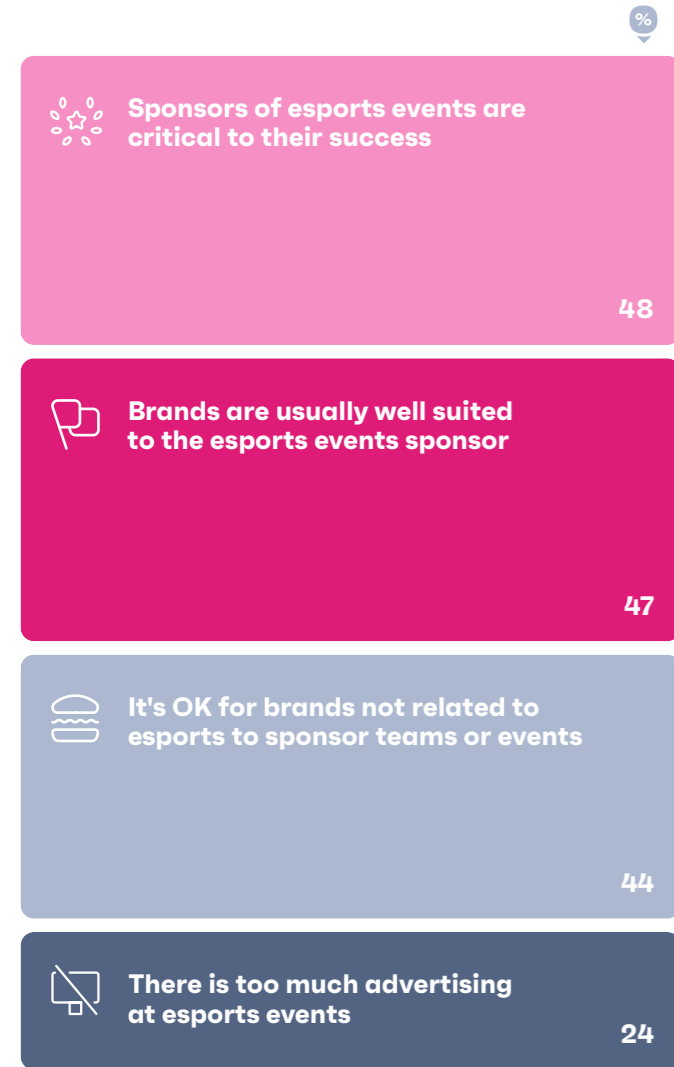
% of esports followers who want brands to do the following



GWI Gaming Q4 2021 13,353 esports followers aged 16-64 in 16 markets

They recognize the value of sponsorship, but beware of ad-overload

% of esports followers who feel the following ways about sponsorship of esports



There's big wins to be had, but they're not guaranteed

The esports landscape is flooded with all kinds of brands and marketers getting in on the action. Plenty of them, including non-gaming brands, have managed to run some **successful campaigns** and reach a very valuable audience. At the same time though, **some haven't fared so well**. As tempting as it might be to dive in head-first, failing to understand these audiences on a fundamental level is a misstep that'll only set brands back.

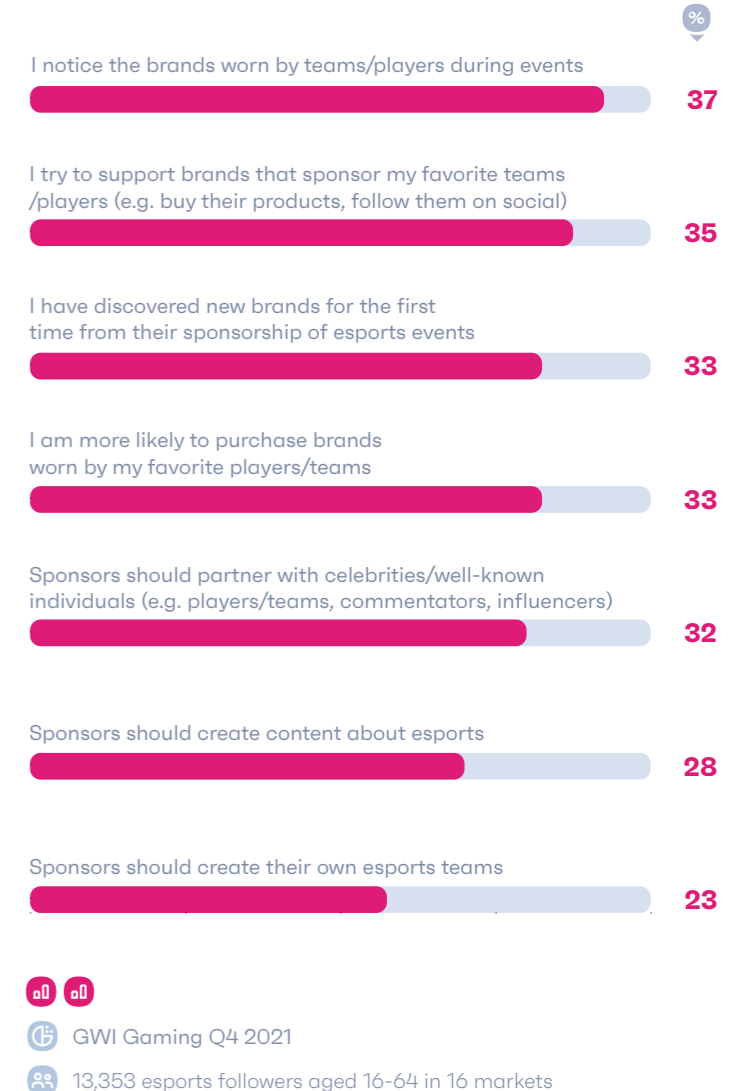
Luckily for the brands eyeing up this space, our data suggests esports followers may be more receptive to sponsorship than some might first think – even when non-gaming brands are concerned. Sponsorship is generally welcomed; 48% say sponsors are critical to esports success and 44% say it's OK for non-gaming brands to sponsor events.

Many esports followers also notice the brand worn by teams/players during events and are more likely to support brands that sponsor their favorite teams, showing the power of player partnerships.

At the same time, a quarter feel there's too much advertising in esports events, which ties in with gamers' biggest frustration with gaming overall: intrusive pop-ups/ads. It's important for esports organizations, publishers, and sponsors in this space to lean into what followers are more receptive to, and using esports teams or players as influencers is just one way of creating relevant content and conversations they're keen to be a part of. Over half of esports followers already follow an esports player on social media, so the added bonus is there's more touchpoints for fans to engage with them.

Sponsorship looks set to pay off, with player partnerships a crucial part

% of esports followers who say these statements apply to them



This is a gamer

Things aren't always as they seem. Assumptions make a mess of campaigns. Stop guessing and start knowing, with our GWI Gaming data set.

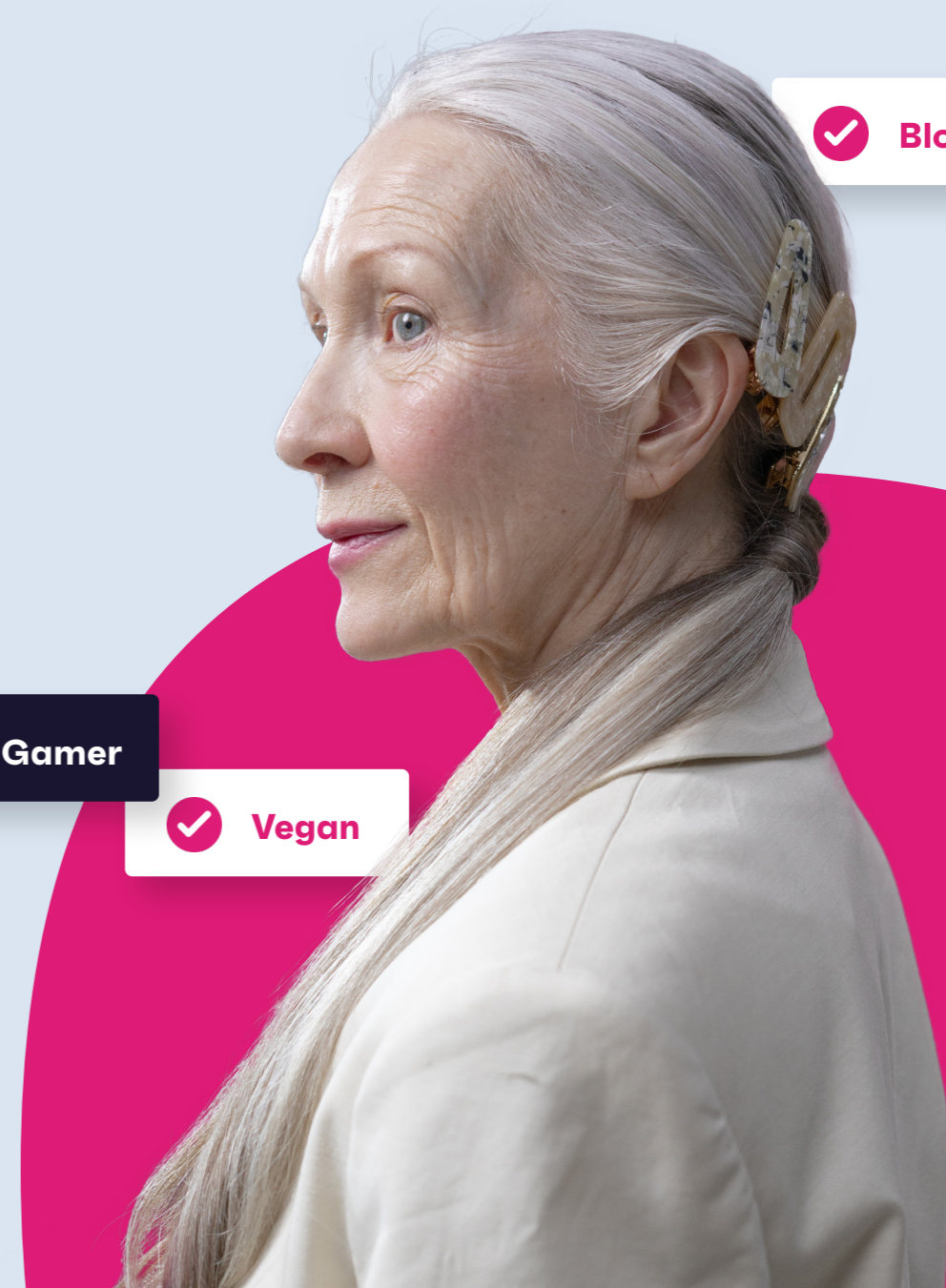


[Find out more](#)

 **Gamer**

 **Vegan**

 **Blogger**



Appendix

- 1 On an average day, how long do you spend watching online television/streaming? • On an average day, how long do you spend watching television?
- 2 On an average day, how long do you spend watching television? • Do you pay for a subscription TV service (e.g. cable, satellite TV or IPTV)?
- 3 On an average day, how long do you spend watching online television/streaming? • In the last month, which of these have you paid for? (Movie/TV streaming service)?
- 4 For each of these services, could you tell us which type of account you use? (I use a premium, unlimited or paid-for account)
- 5 On an average day, how long do you spend watching online television/streaming? • On an average day, how long do you spend watching television? • In a typical week, which of these genres will you have watched on television? • Which of these have you watched in the last month? (On-demand TV/a streaming service (e.g. Netflix)) • In the last month, which of these have you paid for? (Movie or TV streaming service)
- 6 Do you like to consume media (TV, books, films, music) from any of the following countries/regions?
- 7 How often do you visit or use these services? (More than once a day/Daily) • Which platforms/services do you use to do the following? (Find funny/entertaining content)
- 8 In the last week, which of these have you watched or listened to online? (Any device)
- 9 In the last month, I have watched a short online video (less than 4 minutes long) about... • In the last month, I have watched a medium-length online video (between 4 and 20 minutes long) about... • In the last month, I have watched a long online video (over 20 minutes long) about...
- 10 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?
- 11 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? • In the last week, which of these have you watched, listened to, or done online? (Listened to a music-streaming service)
- 12 Which of these music genres do you like listening to? Please select all that apply
- 13 Which types of music/audio content do you most like to listen to?
- 14 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? • In the last week, which of these have you watched, listened to, or done online? (Listened to a music-streaming service)
- 15 In the last month, which of these services have you used to listen to/download music, radio or audiobook content? • For each of these services, could you tell us which type of account you use? (I use a premium, unlimited or paid-for account)
- 16 Which of the following best describes how you feel about advertisements in podcasts?
- 17 Which of these devices do you use to play games?
- 18 Thinking about gaming, which of these things do you do? • What are your main reasons for gaming?
- 19 Before taking this survey, have you ever heard of a metaverse? • You said you are interested in participating in a metaverse. Why is that?
- 20 Which of these best describe your gender? • How old are you? • Current country of residence
- 21 Which of the following do you feel describes you? • What would most motivate you to promote your favorite brand online? • Which of these things do you want brands to do?
- 22 Which of these statements about sponsorship apply to you? • How do you feel about sponsorship of esports?

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.

of industry-leading panel providers. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/ panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

Our quotas

To ensure that our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education – meaning that we interview representative numbers of men vs women,

of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

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

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

Sample size by market

This report draws insights from GWI's Q4 2021 wave of research across 47 countries, with a global sample of 225,242 respondents.

 Argentina	1,570	 Morocco	1,048
 Australia	4,326	 Netherlands	1,314
 Austria	2,098	 New Zealand	1,296
 Belgium	2,104	 Nigeria	829
 Brazil	5,777	 Philippines	3,137
 Canada	6,488	 Poland	3,159
 China	25,195	 Portugal	1,308
 Colombia	2,612	 Romania	1,315
 Denmark	1,584	 Russia	4,334
 Egypt	1,838	 Saudi Arabia	1,558
 France	10,936	 Singapore	3,444
 Germany	10,806	 South Africa	1,845
 Ghana	800	 South Korea	2,370
 Greece	1,316	 Spain	10,684
 Hong Kong	1,832	 Sweden	2,616
 India	14,998	 Switzerland	1,593
 Indonesia	5,247	 Taiwan	2,760
 Ireland	1,315	 Thailand	3,943
 Israel	1,627	 Turkey	2,134
 Italy	10,496	 UAE	1,847
 Japan	10,576	 UK	10,509
 Kenya	957	 USA	26,183
 Malaysia	3,816	 Vietnam	3,318
 Mexico	4,384		

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 right) 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

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of around 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 in North America, much of Europe and places in APAC such as Japan and Australia.

Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. In some Middle Eastern, African and Asian countries (e.g. India, Indonesia), we would also expect a gender-based skew towards males. Generally, younger internet users are more active and engaged with a lot of the behaviors and services tracked by GWI, which means % scores will typically be higher in low-to-medium-penetration markets.

Get in touch



KATIE GILSEAN
TRENDS MANAGER
katie.gilsean@gwi.com



CHASE BUCKLE
VP, TRENDS
chase@gwi.com



VIKTORIYA TRIFONOVA
TRENDS MANAGER
viktoriya@gwi.com

GW.