globalwebindex

Entertainment

GlobalWebIndex's flagship report on the latest trends in entertainment

FLAGSHIP REPORT 2019

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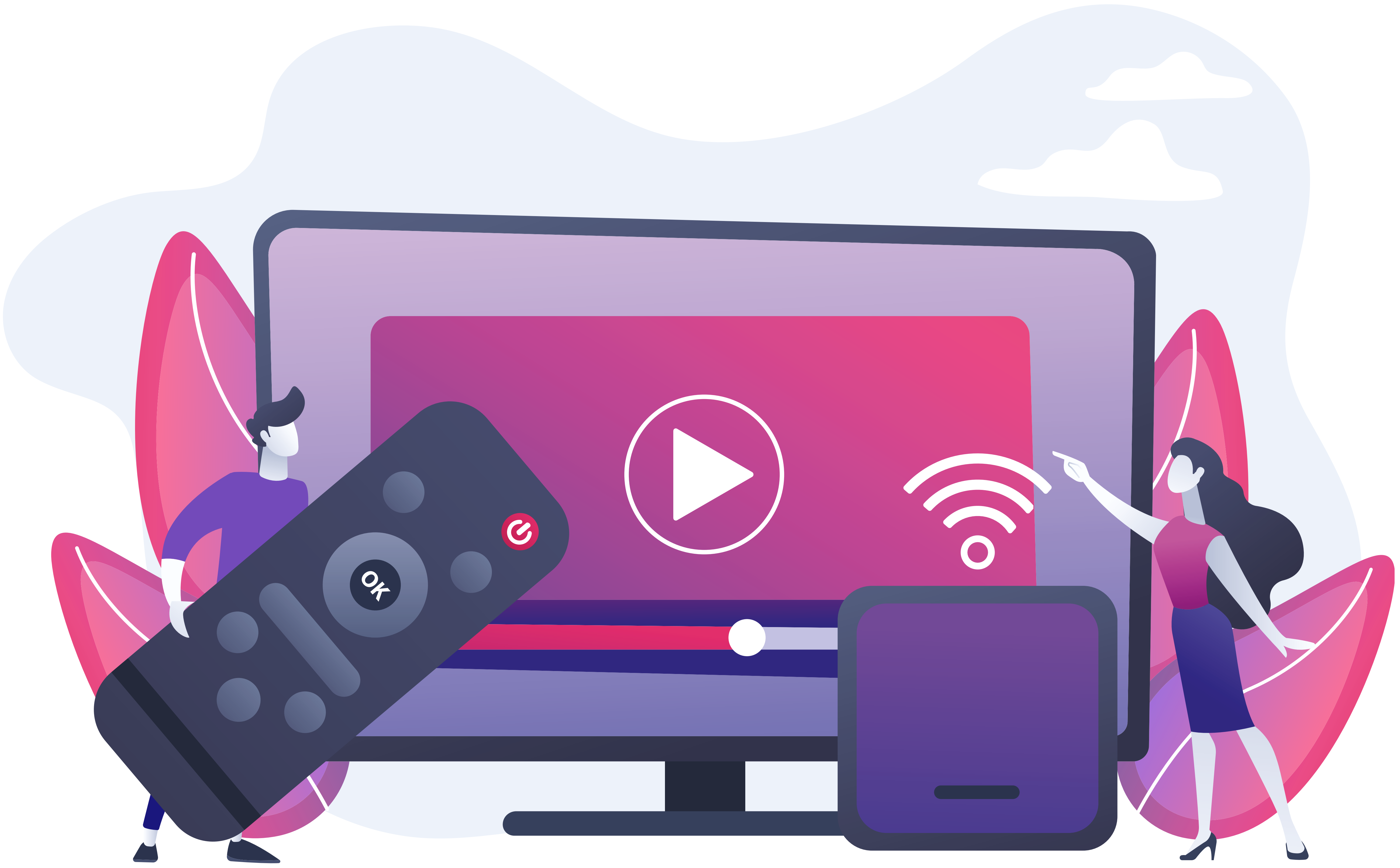
Contents



Introduction

GlobalWebIndex Entertainment flagship reports provide the most important insights and the latest figures for online entertainment behaviors around the world. Among others, this report covers the following topics in detail:

01 The number of users engaging with online entertainment, including music, video, and games

02 The relationship between linear and online TV

03 The state of online music and video streaming, as well as which platforms are performing best

04 The trends in social media entertainment

05 Which devices are most important for gaming, how gaming entertainment is evolving, and the opportunities this presents for brands

06 The impact of entertainment on the consumer-brand relationship

METHODOLOGY

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and 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, GlobalWebIndex interviews over 575,000 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 GlobalWebIndex's Core survey via PC/laptop/tablet.

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 average internet user. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

For more detailed information on GlobalWebIndex and the data used in this report, please consult our **Notes on Methodology** at the end of this report.

Key Insights

TV AND FILM

In every age bracket, internet users watch more broadcast TV than online TV, despite year-on-year drops in broadcast engagement. **Online TV has captured more and more daily media time among internet users since 2012.** Rather than cannibalizing broadcast distribution, online TV has continued to complement it, moving the experience away from one-time, one-place viewing to a more flexible experience.

Netflix and its global expansion has put the company into competition with local services in each country they enter. **Netflix now leads in four of the five regions,** making significant headway in the Middle East and Africa and Asia Pacific regions. But the service is especially popular in Latin America, and has almost single-handedly galvanized the region's video streaming market as well as increased the quality and diversity of content available in the region.

MUSIC

Music streaming has the most potential to expand in European countries, where populations are older and radio is still king. Markets like Austria, Belgium, Poland, and the Netherlands all still have on average around one hour's difference between daily radio and music streaming consumption. Internet users in Indonesia, on the other hand, spend about ¾ hour longer per day on music streaming services than broadcast radio.

In the 41 markets GlobalWebIndex tracks named music-streaming service engagement, Spotify is the most popular music service in 24 of them. In three out of the five regions, Spotify tops the charts. **Even in APAC and the Middle East and Africa, where Spotify typically struggles against more localized competitors, monthly engagement is growing.**

SOCIAL MEDIA

Social media platforms have evolved into content hubs. Underpinning many of the trends in this report, social media has taken entertainment to the next level. **Entertainment brands seeing the most success are the ones who have an engaging product complemented with and enhanced by social features.** TikTok is the prime example of this – TikTok members are 1.35 times the global average to say meeting new people and making new connections is an important reason for them using the internet.

The younger the audience, the more likely they are to use social media for entertainment purposes. But **it's important not to generalize; 84% of 55-64-year-olds say they have watched a video clip in the last month, to name one example.** The content type where we see the largest age gap – celebrity networking/following – still attracts 31% of the oldest audience we surveyed.

GAMING

Gaming is playing an increasingly prominent role in the entertainment industry, and has become unquestionably mainstream: 92% of internet users game on at least one device. However, in recent years, we've reported a year-on-year decline in games console ownership. **But there are signs that not only has the decline stabilized, but consoles might be making something of a comeback,** thanks in part to the introduction of battle royale games, as well as innovative and adaptable new consoles like the Nintendo Switch.

Whether it's watching a live gaming stream, an esports tournament or broadcasting a live stream of your own gameplay, **all three activities have increased consistently over the last few years.** Live streaming video platform Twitch has emerged as one of the first of its kind to capitalize on the surge in gaming entertainment being hosted online. **Twitch is a community-driven platform, and Twitch users' desire for connection is reflected in their unique attitudinal profile**.

01

Entertainment

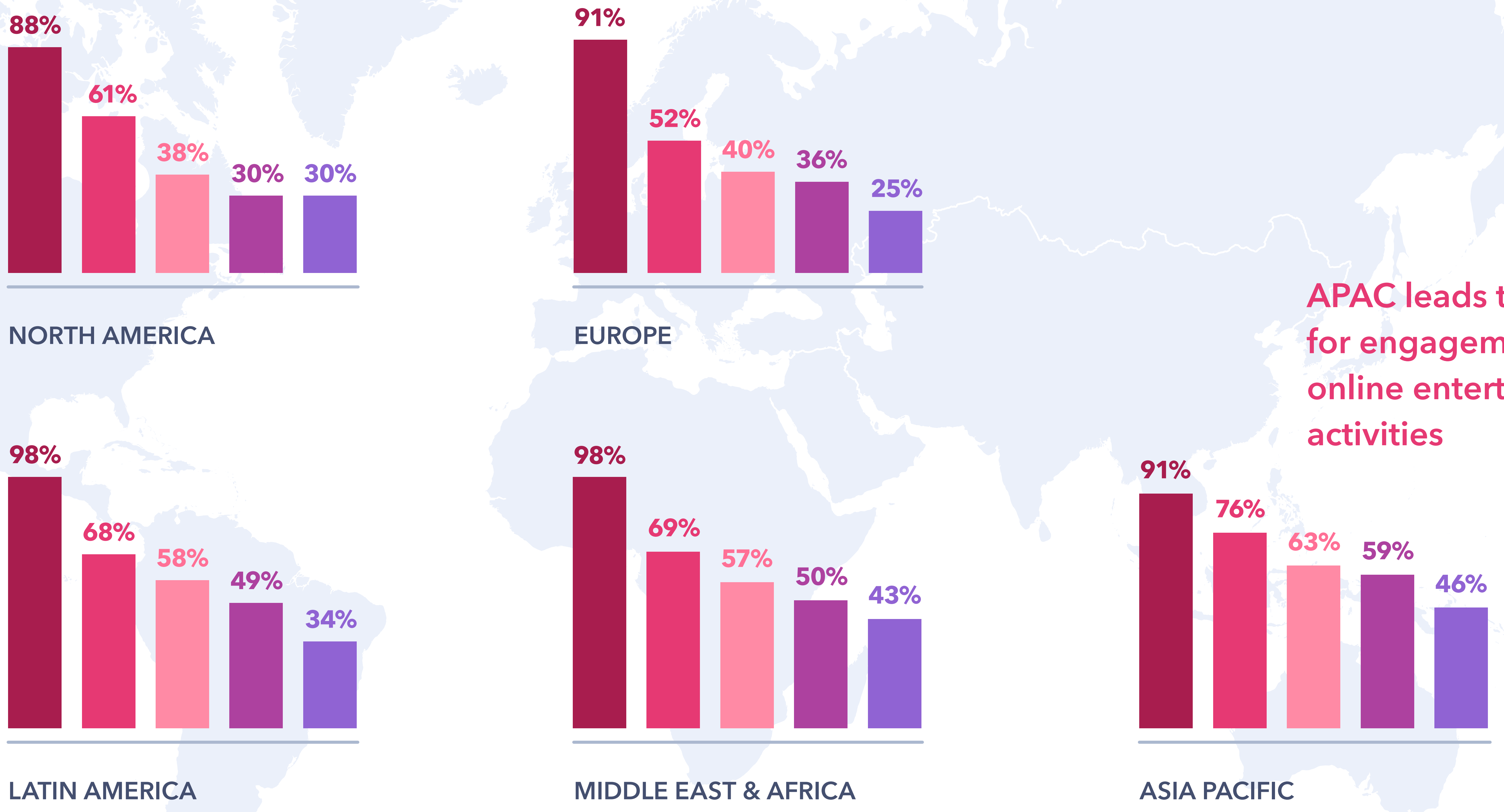
Engagement with Digital Entertainment

Engagement Around the World

ONLINE ENTERTAINMENT ACTIVITIES

% of internet users who have done the following in the last month

- Watched a video clip/visited a video-sharing site
- Used a music-streaming service
- Watched sports coverage or highlights online
- Watched a vlog
- Listened to or watched a podcast



APAC leads the way for engagement with online entertainment activities

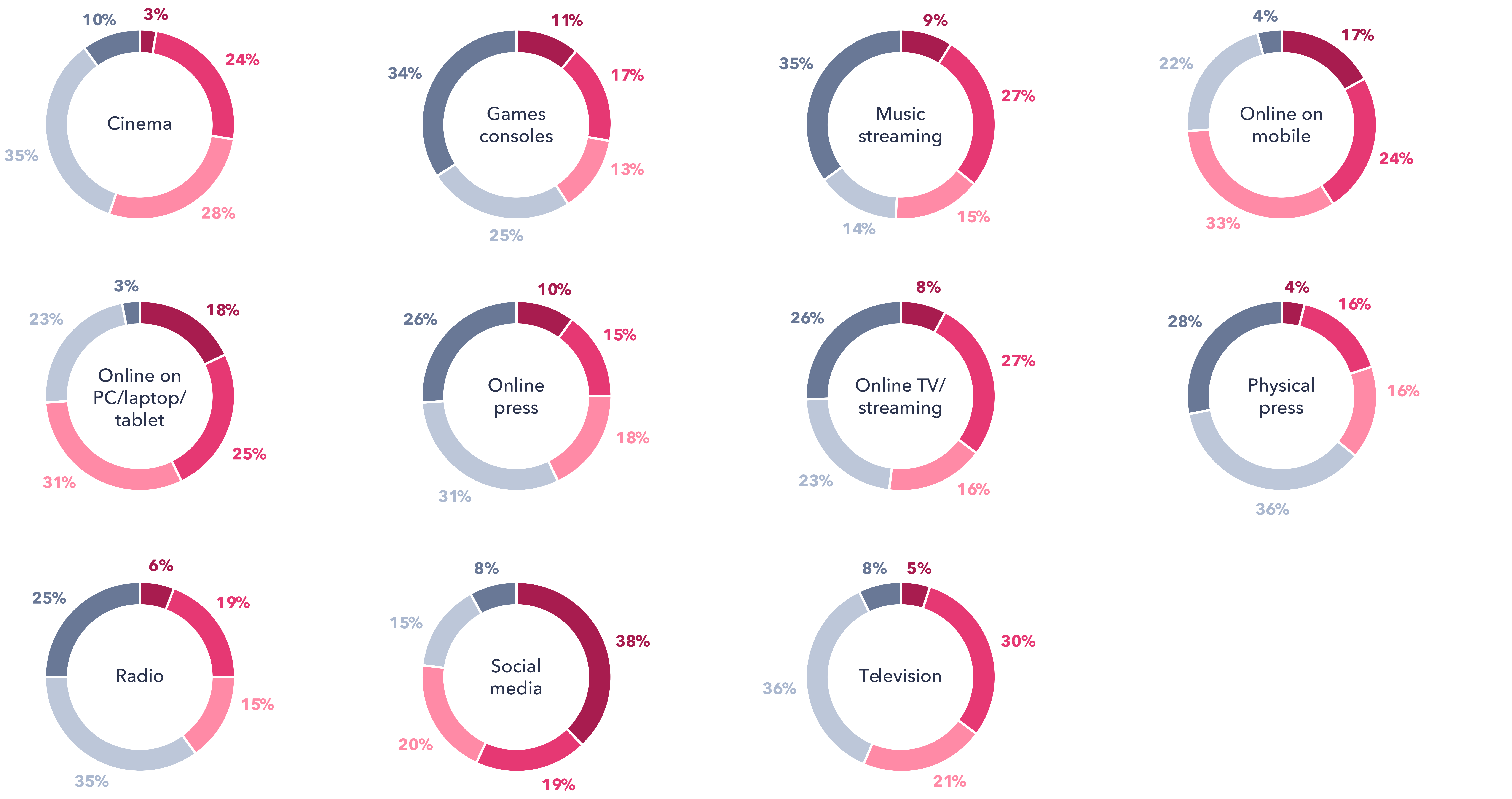
Question: In the past month, which of the following things have you done on the internet via any device? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

Online Consumption

MEDIA CONSUMPTION SEGMENTATION

Internet users' engagement levels with the following forms of media

- Heavy Users
- High Users
- Medium Users
- Light Users
- Non-Users



For more information about how the segments in this question are defined, please **click here**

Question: On average, how often would you say you do the following things? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

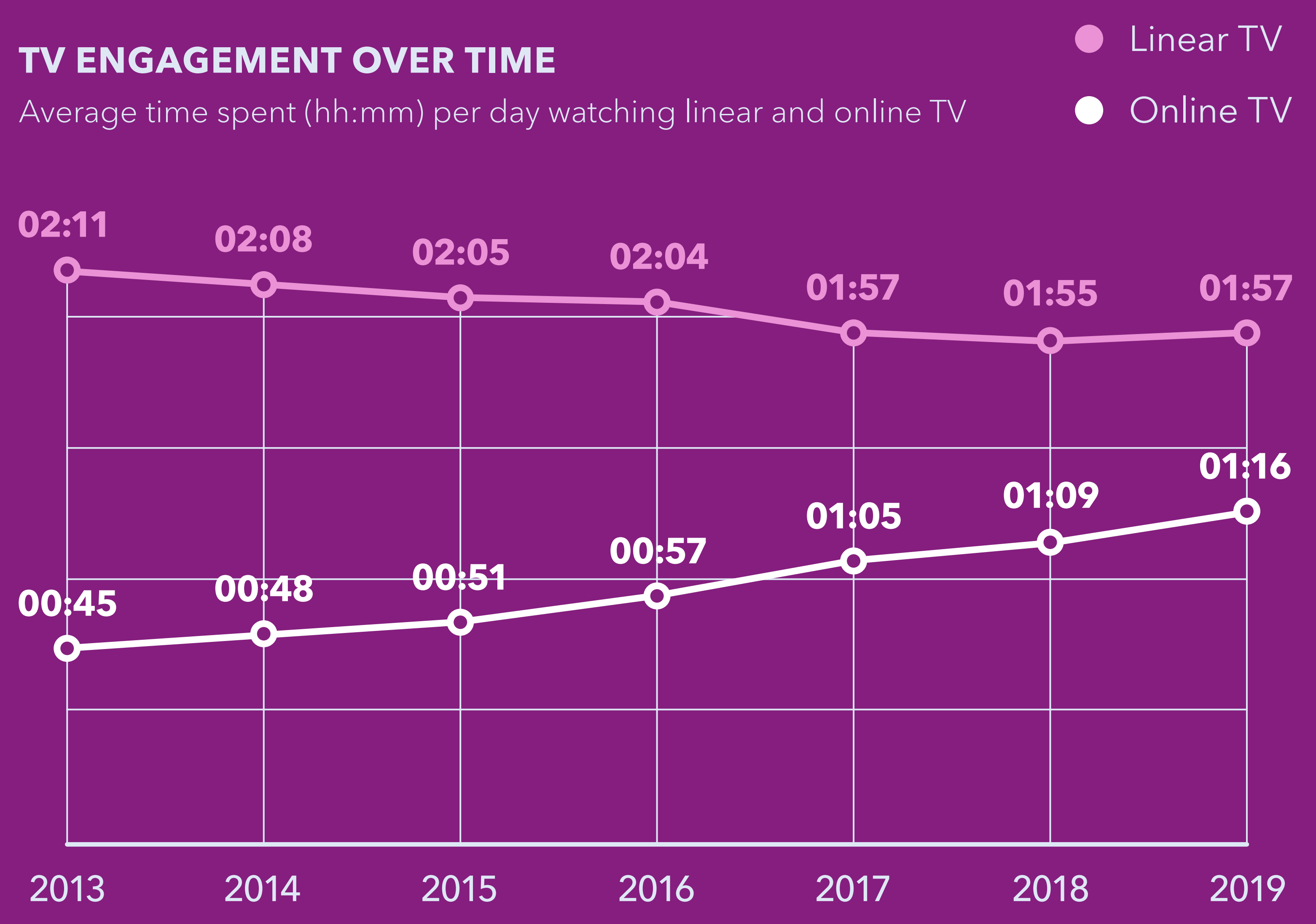
02

Entertainment

TV/Video

TV ENGAGEMENT OVER TIME

Average time spent (hh:mm) per day watching linear and online TV



Question: Roughly how many hours do you spend on watching TV during a typical day? | Roughly how many hours do you spend on watching online TV during a typical day? **Source:** GlobalWebIndex 2013-2019 **Base:** 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), and 230,936 (H1 2019) Internet users aged 16-64

Traditional vs Online TV

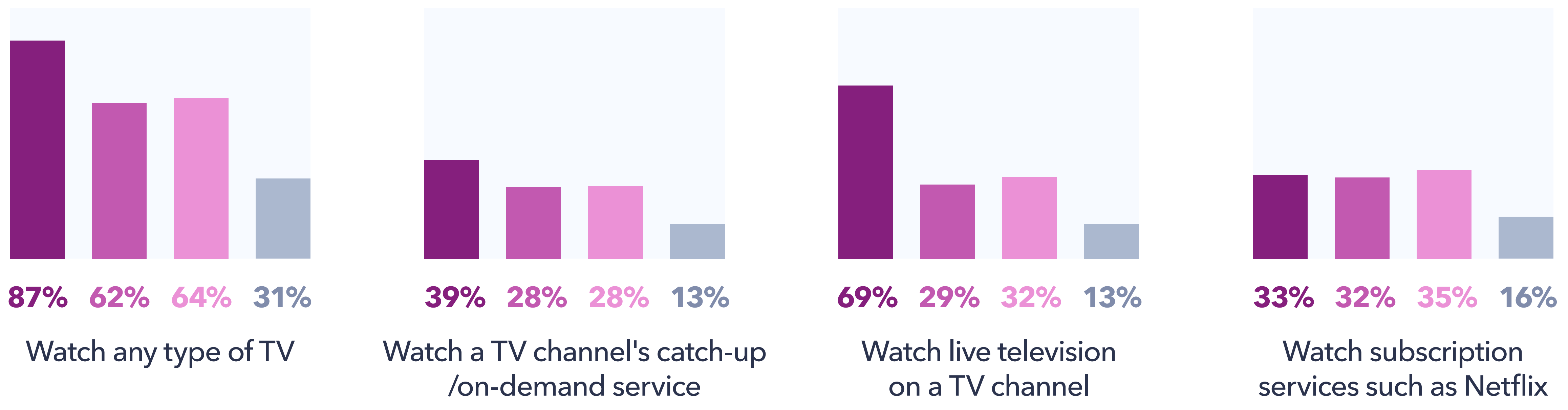
In every age bracket, **internet users watch more broadcast TV than online TV, despite year-on-year drops in broadcast engagement**. Lifestyle has an impact in preserving its reach, as consumers in a relationship or marriage post stronger engagement with broadcast TV compared to those who are single, although all groups watch roughly the same amount of online TV per day.

Online TV has captured more and more daily media time among internet users since 2012, climbing from the 45 minute per day mark to its current standing of 1 hour 17 minutes. Context is key here. Rather than cannibalizing broadcast distribution, online TV has continued to complement it, moving the experience away from one-time, one-place viewing to a more flexible experience.

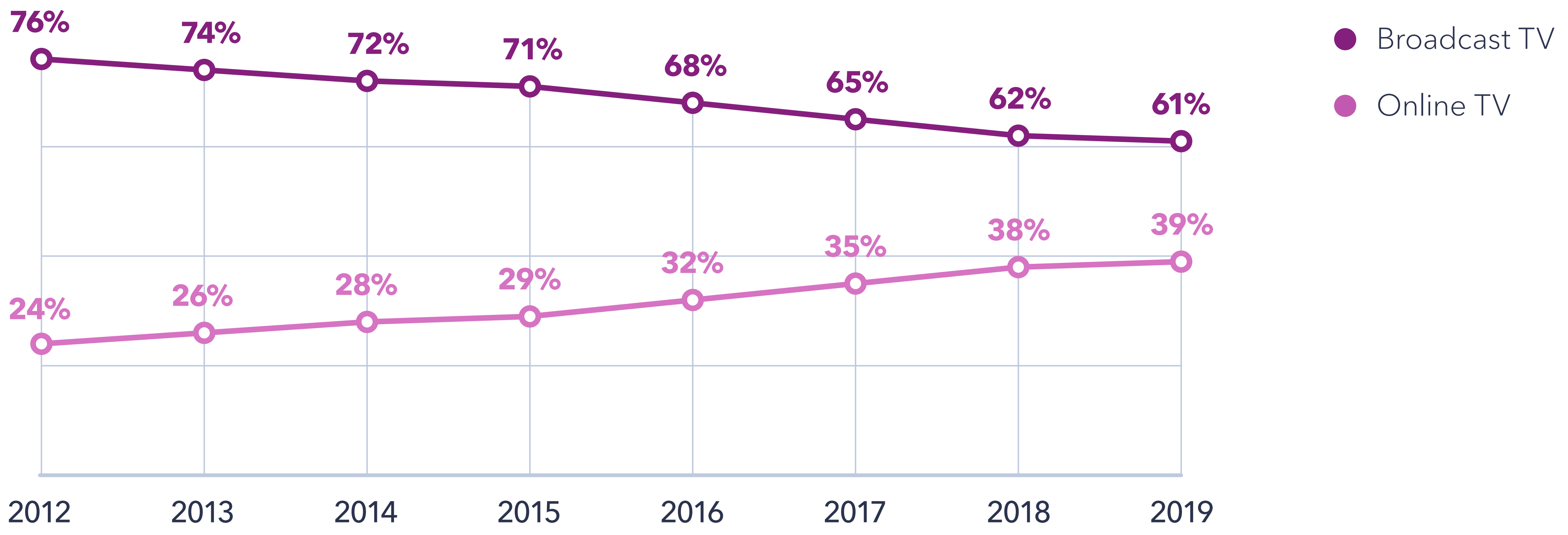
Whether it's catching up on missing content or finding online-exclusive content from popular shows, online entertainment is now providing a value of its own, which in turn adds value to broadcast channels.

TV ENGAGEMENT BY DEVICE

% who did the following last month via…



SHARE OF DAILY TIME WATCHING TV



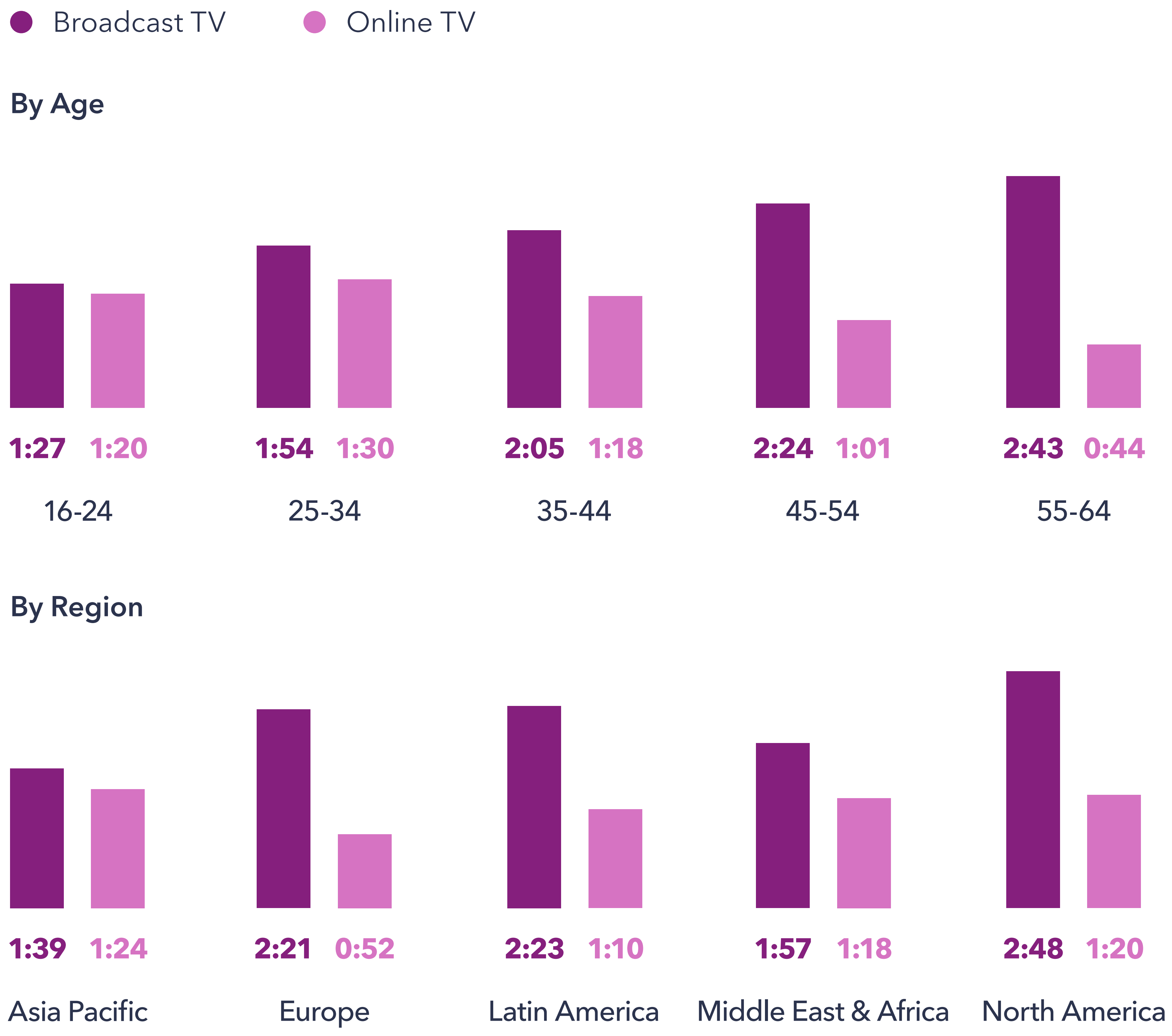
Questions: In the past month, which devices have you used to do the following? This includes any TV you watch in your home, office, while traveling or any other location. **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

Questions: Roughly how many hours do you spend on watching TV during a typical day? | Roughly how many hours do you spend on watching online TV during a typical day? **Source:** GlobalWebIndex 2012-2019 **Base:** 31,413 (Q4 2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 335,611 (H1 2019)

TV Consumption

LINEAR VS. ONLINE TV

Average time spent (hh:mm) per day watching the following



From a regional perspective, **North America posts the strongest figures for broadcast TV by a considerable margin** (02:48 per day) and also has a high consumption of online TV (01:20). **Internet users in the Asia-Pacific region, on the other hand, are spending the longest amount of time watching online TV** (01:24) and are the least enthusiastic watchers of linear TV (01:39).

64% of internet users watch TV in some form on a mobile unit, showing consistent increases in each quarter over the past year. The portability of smartphones, together with impressive screen resolutions, generous data packages in many markets and the ability to download and watch offline all points to a prominent role in the online entertainment landscape. Because mobile units have increasingly brought TV out of the household, marketers are now able to reach consumers throughout the day, no matter their location or daily routine.

Questions: Roughly how many hours do you spend on watching TV during a typical day? | Roughly how many hours do you spend on watching online TV during a typical day? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

TV Viewing by Market

Average time (hh:mm) spent watching **linear TV** and **online TV** on a typical day

Market	Linear TV	Online TV
Argentina	02:23	01:02
Australia	02:18	01:00
Austria	01:53	00:46
Belgium	02:10	00:41
Brazil	02:34	01:15
Canada	02:23	01:08
China	01:28	01:36
Colombia	02:22	01:00
Denmark	02:05	01:08
Egypt	01:40	01:09
France	02:35	00:36
Germany	02:16	00:47
Hong Kong	01:40	00:59
India	01:34	01:31
Indonesia	02:04	00:59
Ireland	01:53	01:00
Italy	02:18	00:47
Japan	02:14	00:18
Malaysia	02:03	01:09
Mexico	02:06	01:10
Netherlands	02:18	00:41
New Zealand	01:53	01:08
Philippines	02:21	01:27
Poland	02:27	00:56
Portugal	02:06	00:39
Romania	02:35	01:04
Russia	02:21	00:44
Saudi Arabia	01:58	01:38
Singapore	01:31	01:03
South Africa	02:27	01:11
South Korea	02:05	00:44
Spain	02:08	00:57
Sweden	02:00	01:02
Switzerland	01:54	00:42
Taiwan	01:31	00:57
Thailand	02:14	01:37
Turkey	02:16	01:09
UAE	01:31	01:33
UK	02:39	01:14
USA	02:51	01:22
Vietnam	01:13	01:04

% using subscription services such as Netflix each month

Market	%
Argentina	83%
Australia	69%
Austria	57%
Belgium	48%
Brazil	82%
Canada	69%
China	74%
Colombia	76%
Denmark	73%
Egypt	41%
France	49%
Germany	56%
Hong Kong	44%
India	71%
Indonesia	64%
Ireland	72%
Italy	59%
Japan	25%
Malaysia	53%
Mexico	87%
Netherlands	61%
New Zealand	70%
Philippines	71%
Poland	62%
Portugal	45%
Romania	52%
Russia	24%
Saudi Arabia	61%
Singapore	52%
South Africa	62%
South Korea	36%
Spain	68%
Sweden	67%
Switzerland	47%
Taiwan	39%
Thailand	57%
Turkey	57%
UAE	61%
UK	70%
USA	74%
Vietnam	56%

Questions: Roughly how many hours do you spend watching television during a typical day? | Roughly how many hours do you spend watching/streaming online forms of television during a typical day? | In the past month, which devices have you used to do the following? This includes any TV you watch in your home, office, while traveling or any other location. Watch subscription services such as Netflix **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

A UK Milestone

6 in 10 UK internet users aged 16-64 have watched Netflix in the last month, the twelfth highest engagement out of the 41 markets we survey

Digital streaming has reached a new landmark in the UK, with consumers here spending more than **£100m a week** on digital entertainment services such as Netflix and Spotify in the first half of this year for the first time. With the first half of the year usually relatively quiet for entertainment sales, this is quite a feat. The growth of subscription TV and music services has offset the decline in traditional media like CDs and DVDs. With serious appetite for digital content, it offers great opportunities for the new digital players entering the UK.

The Video Streaming Market

GLOBAL VOD COMPETITION

% who have used the following services to watch/download TV shows, films or videos in the last month

APAC (EXCLUDING CHINA)

Netflix	49%
Google Play	43%
Hotstar[1]	29%

LATIN AMERICA

Netflix	80%
Google Play	36%
Claro Video[4]	18%

CHINA

iQiyi[2]	69%
YouKu & Tudou[2]	60%
Tencent Hollywood VIP[3]	43%

MIDDLE EAST & AFRICA

Google Play	45%
Netflix	44%
Shahid.net[5]	28%

EUROPE

Netflix	40%
Google Play	20%
Amazon Prime Video	16%

NORTH AMERICA

Netflix	66%
Amazon Prime Video	31%
Hulu[6]	29%

Netflix and its global expansion has put the company into competition with local services in each country they enter. **Netflix now leads in four of the five regions, making significant headway in the Middle East and Africa and Asia-Pacific regions.** Excluding China, Netflix is now the most used TV streaming service in the APAC region, despite not even entering the top 10 in China.

Beyond these local competitors, streaming services also face a challenge in monetizing users. At present, there's a gap between the number of internet users watching a service and those actually paying for it. Account sharing is a major cause: 58% of Amazon Prime Video users and 74% of Netflix users share their accounts with friends and family. Netflix may have **something** to say about this soon, though.

Netflix is hugely popular in Latin America, and has almost single-handedly galvanized the video streaming market as well as increased the quality and diversity of content available in the region. All four LatAm markets we currently survey show the highest monthly engagement with Netflix (ranging from 73% in Colombia to 85% in Mexico), as well as the highest proportion of premium/paid-for subscribers. In Argentina, 89% of Netflix monthly users have paid-for accounts (only 11% are free or trial members).

Netflix leverages and encourages this engagement cleverly; they **recently** featured Latinx YouTube stars in their promotion of a new season of Black Mirror. It's savvy use of social media and creation of local, influencer-based campaigns is a great example of a company driving enthusiasm and engagement with their most vocal fans.

However, recently it has not been all rosey for the streaming giant. First, its most popular show *The Office* was **stripped** from its platform by NBC. Then, Netflix was hit by a rare loss in U.S. subscribers and a large **miss** on international subscriber expectations in the second quarter, which affected the stock. And now news has just come out that all of its 46% gain for the year at its peak has been erased and it has officially entered negative territory.

[1] India Only

[2] China and Taiwan Only

[3] China Only

[4] Argentina, Brazil, Colombia, Mexico and U.S.A. Only

[5] Egypt, KSA & UAE Only

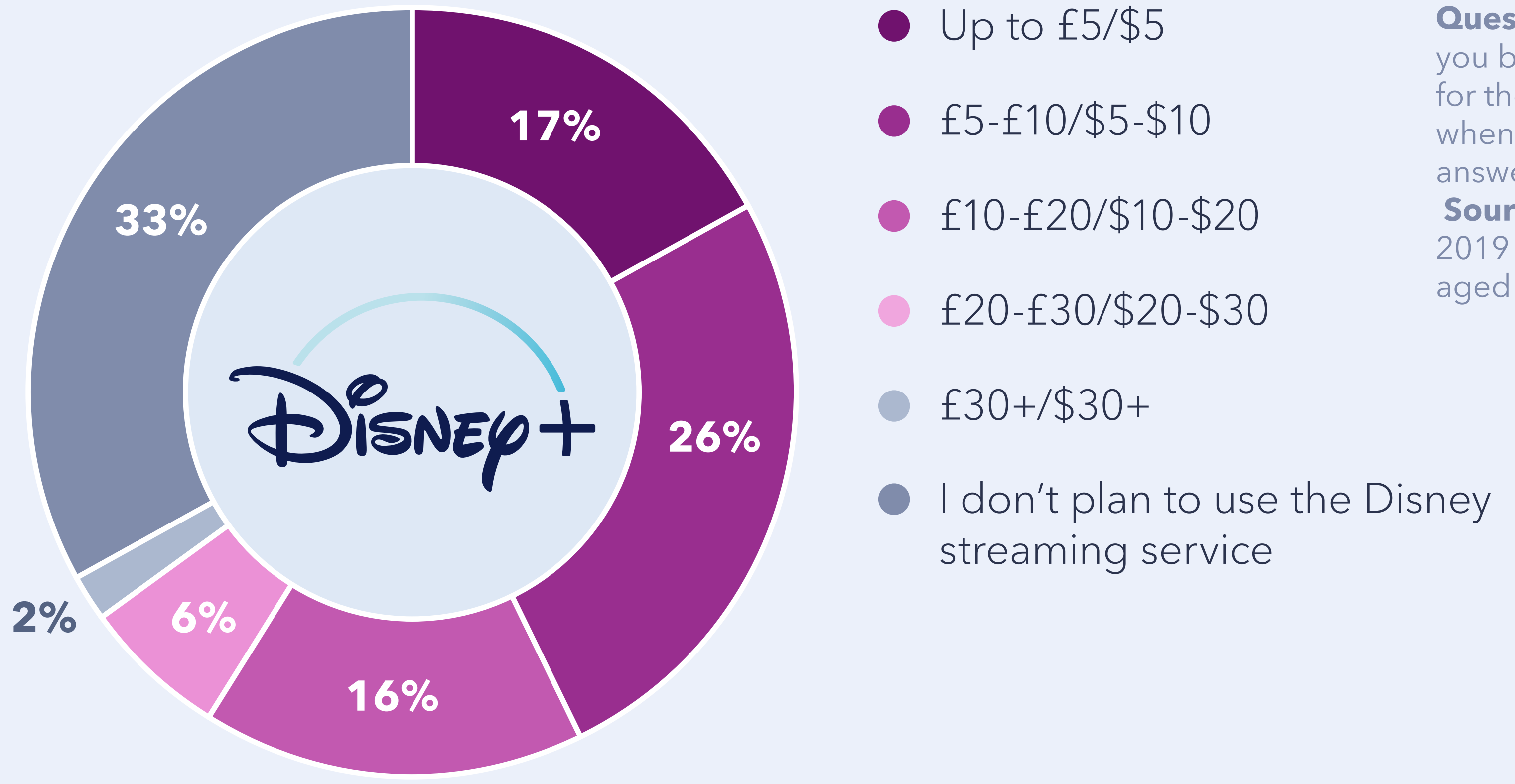
[6] Japan and U.S.A. Only

Questions: In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way. **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

Another Seat at a Crowded Table

More than a quarter of U.S. internet users are willing to pay significantly more than the $6.99 a month Disney will charge for its service Disney+

% of internet users in the U.S. and UK who say they would be willing to pay the following per month for the Disney streaming service



Question: How much would you be willing to pay per month for the Disney streaming service when it launches? Please answer in the currency you use. **Source:** GlobalWebIndex June 2019 **Base:** 5,507 internet users aged 16-64 in the UK and U.S.

Disney will offer a bundle package of its **three streaming services** – Disney+, Hulu (ad-supported), and ESPN+ – for $12.99 a month starting on November 12th. The service will be cheaper than Netflix's premium package, which costs $13.99 per month. It's also notably cheaper than HBO Max's rumored streaming price of $16 or $17 a month.

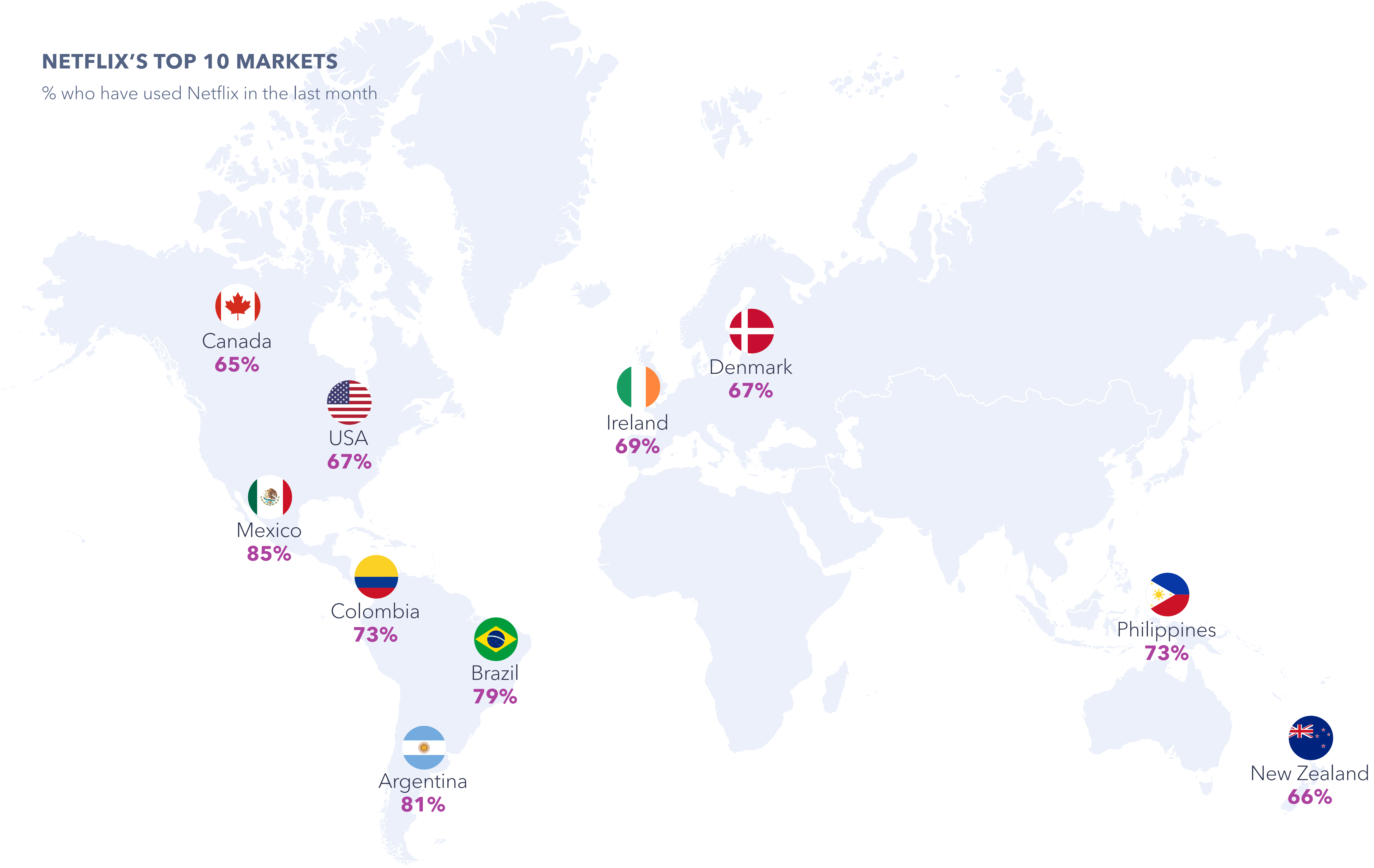
At a demo event for Disney+, journalists **commented** on its crisp user interface; one perhaps more focused on guiding users to compartments of content, rather than throwing content at them, as Netflix does. This could change in the near future though, as the platform is testing a Collections feature which would provide more human curation to its algorithm-driven recommendations. Our data backs this kind of approach, as consumers paradoxically want as much content as possible, but can get overwhelmed by too much of it.

Netflix's Global Expansion

Despite these recent alarm bells for Netflix, **one reassuring finding will be the increase in Netflix engagement over the past year in India, increasing by 14 percentage points to 58%.** While internet user growth is **slowing** down worldwide, it's **booming** in India. Additionally, India's streaming market is also one of the biggest and fastest-growing in the world, and at the same time, one of the most resistant to penetration from global players. The country's video market is valued at over $700 million and is **expected** to grow to $2.4 billion in value by 2023, with the over-the-top (OTT) industry **projected** to be with the highest growth rate. This is likely the reason behind Netflix **commissioning** ten new original movies in India.

NETFLIX'S TOP 10 MARKETS

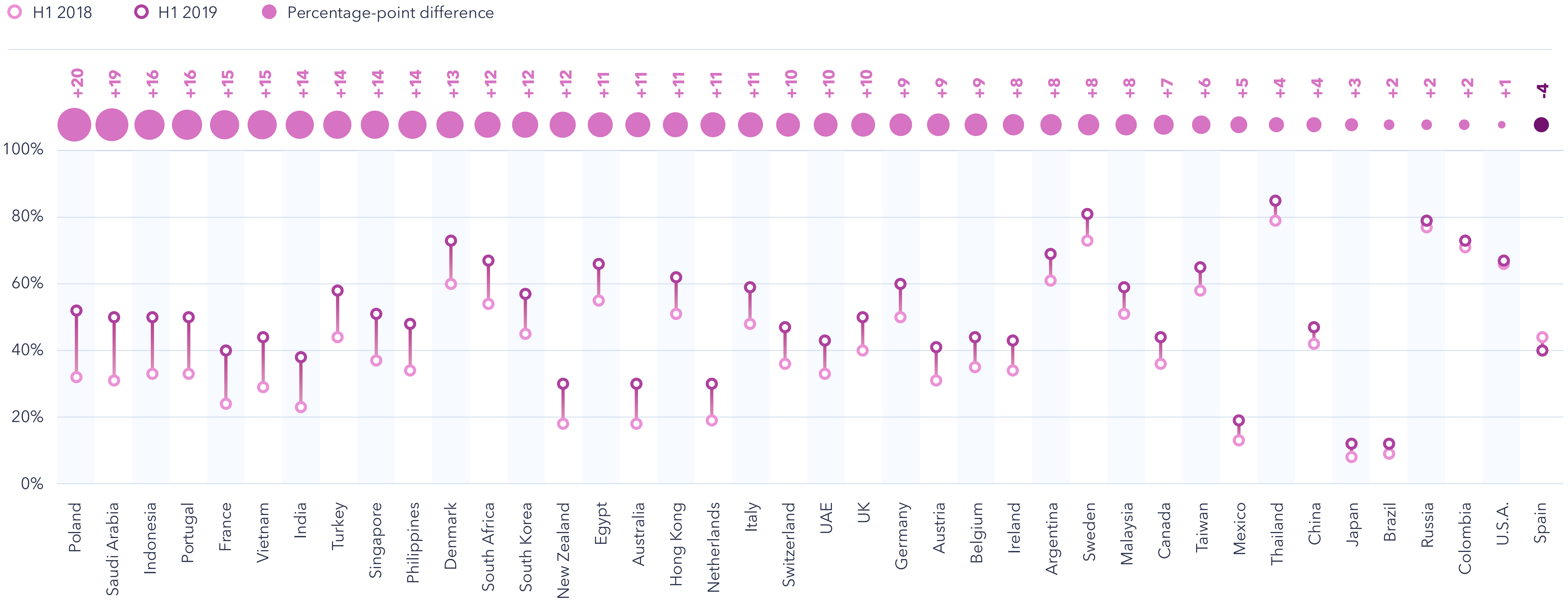
% who have used Netflix in the last month



Questions: Which of the following services have you heard of/used? I have used it in the last month **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

NETFLIX ENGAGEMENT

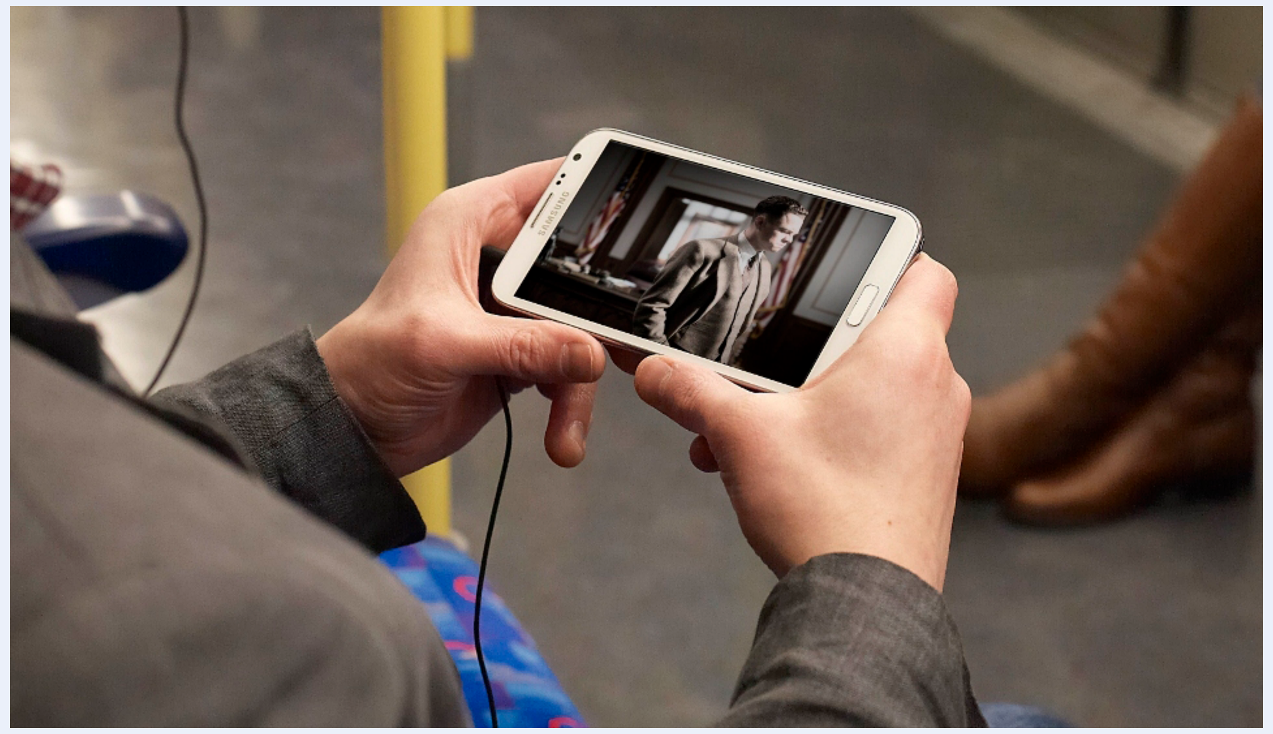
% who have used Netflix in the last month



Questions: Which of the following services have you heard of/used? I have used it in the last month **Source:** GlobalWebIndex H1 2018 & H1 2019 **Base:** 221,679 (H1 2018) and 230,936 (H1 2019) Internet Users aged 16-64

• TREND IN ACTION •

Streaming Across Multiple Devices



Researchers at MIT's Computer Science and Artificial Intelligence Lab created a **system** called "Minerva" to help multiple users share a limited WiFi connection. The system reduces buffering and pixelation by taking into account the various needs of different delivery services streaming on a network. For example, it doesn't treat a 4K Apple TV the same as an older smartphone, and it also considers the nature of the content too. Video is then served to viewers based on their actual needs, instead of being allocated evenly across devices. When tested, it resulted in a quality jump equivalent to going from 720p to 1080p in as much as a third of the time, and eliminated the need for rebuffing by almost 50%. It also doesn't require any fundamental infrastructural changes, making it ideal for the likes of Netflix and Hulu to roll out.

03

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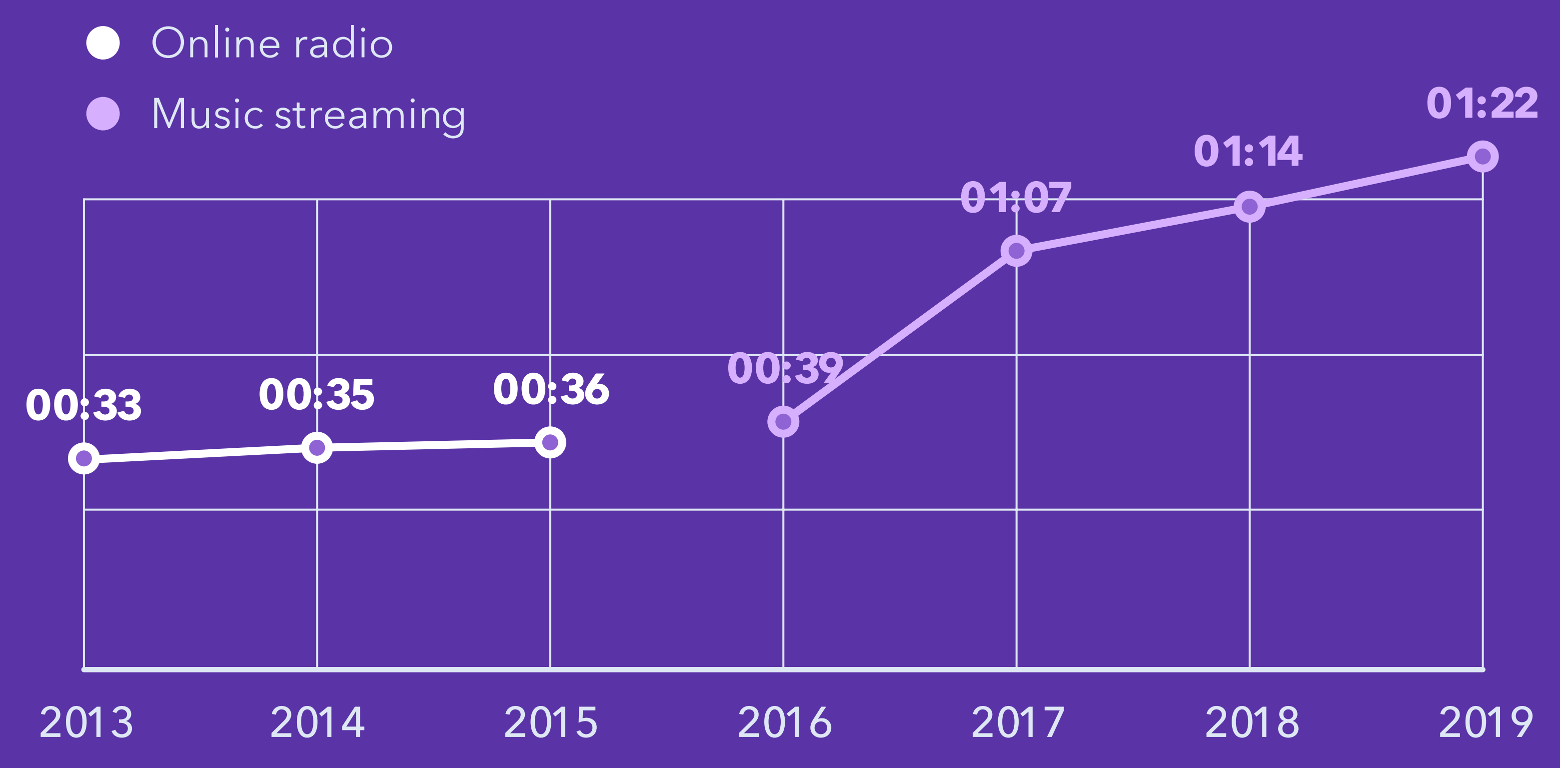
The Music Streaming Market

ONLINE MUSIC ENGAGEMENT OVER TIME

Average time spent (hh:mm) per day listening to online radio and music streaming services



Question: Roughly how many hours do you spend listening to online radio during a typical day? // On an average day, how long do you spend on music streaming services? **Source:** GlobalWebIndex 2013-2019 **Base:** 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), and 230,936 (H1 2019) internet users aged 16-64

Music Streaming Behaviors

Country	% who used a music-streaming service in the past month	% who paid for music streaming service in the past month	Time spent per day on music streaming services	Time spent per day on broadcast radio
Argentina	61%	19%	01:31	01:17
Australia	56%	26%	01:05	01:09
Austria	49%	22%	00:43	01:43
Belgium	46%	16%	00:47	01:48
Brazil	69%	26%	01:37	01:02
Canada	55%	24%	01:13	01:16
China	81%	26%	01:26	01:01
Colombia	59%	16%	01:17	01:18
Denmark	62%	27%	01:07	01:20
Egypt	70%	13%	01:08	00:45
France	47%	17%	00:48	01:02
Germany	46%	25%	00:46	01:34
Hong Kong	60%	20%	00:58	00:44
India	79%	28%	01:44	00:46
Indonesia	85%	30%	01:28	00:42
Ireland	63%	26%	01:07	01:12
Italy	55%	19%	00:53	01:11
Japan	30%	14%	00:20	00:28
Malaysia	70%	19%	01:21	01:10
Mexico	72%	31%	01:46	01:03
Netherlands	47%	21%	00:51	01:52
New Zealand	60%	26%	01:06	01:15
Philippines	82%	28%	02:05	00:54
Poland	51%	18%	01:08	01:59
Portugal	48%	10%	00:49	01:27
Romania	55%	11%	01:10	01:25
Russia	42%	7%	00:43	00:46
Saudi Arabia	70%	17%	01:12	00:44
Singapore	60%	20%	01:11	01:02
South Africa	66%	23%	01:27	01:37
South Korea	61%	29%	00:56	00:32
Spain	54%	20%	00:56	01:06
Sweden	69%	38%	01:27	01:19
Switzerland	50%	20%	00:52	01:33
Taiwan	64%	18%	01:04	00:28
Thailand	66%	19%	01:28	00:43
Turkey	75%	25%	01:24	00:46
UAE	68%	19%	01:19	00:49
UK	58%	28%	01:15	01:19
USA	62%	26%	01:31	01:16
Vietnam	75%	21%	01:05	00:29

Vinyl is poised to outsell CDs for the first time since 1986

Question: In the past month, which of the following things have you done on the internet via any device? | Which of the following types of online content have you paid for in the past month? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

The Streaming Market

Music streaming is one of the least popular forms of entertainment we track, with 34% of the online population never using these services. **There's a significant number of high/heavy engagers (36%), but there's still work to do in converting non-users into casual listeners.**

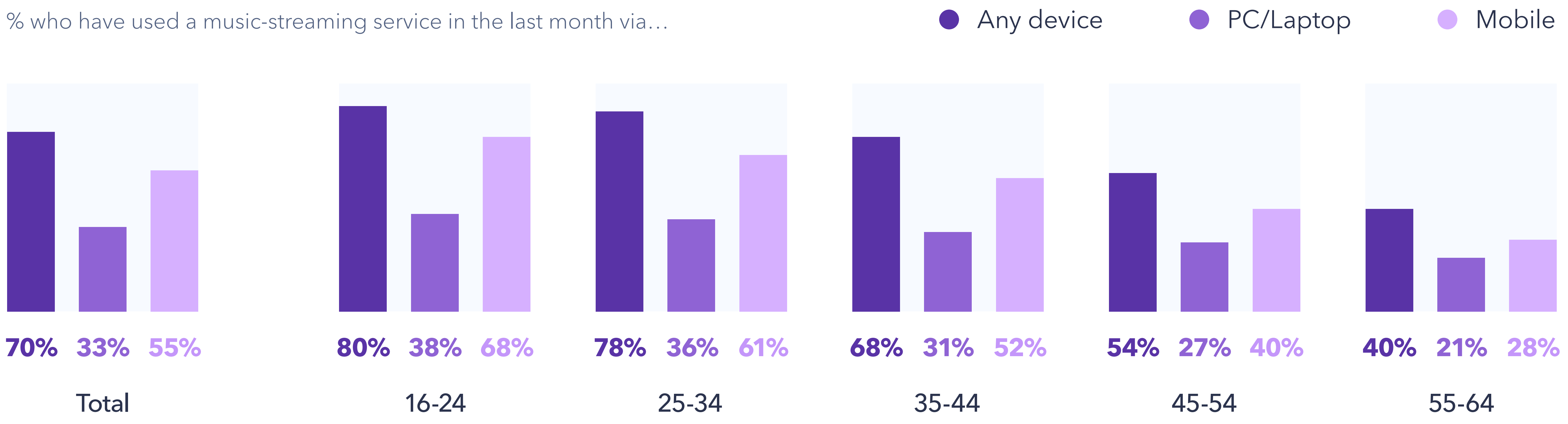
Music streaming has the most potential to expand in European countries, where populations are older and radio is still king. Markets like Austria, Belgium, Poland, and the Netherlands all still have on average around one hour difference between daily radio and music streaming consumption. Internet users in Indonesia, on the other hand, spend about ¾ hour longer per day on music streaming music services than broadcast radio.

Out of our 17 European markets, only two - Sweden and Turkey – have a higher consumption of music streaming services. But the space remains open to innovation. Radio stations such as iHeart and NPR have been cashing in on the popularity of podcasts in a bid to boost ratings. And they need to be innovative, as the global radio industry is struggling to hold onto long-time listeners and advertisers while attempting to puzzle out how best to build out their digital offerings. According to local media research company Borrell Associates, radio is predicted to see an average annual decline of 3.8% overall, from $11.8bn in 2017 to $9.5bn in 2022.

As with TV streaming, **there's a gap between the number of internet users who report using a music streaming service and those who have paid for one,** underlining the work needed to create revenue from users. Six in ten Spotify users and 57% of Apple Music users are on free or trial accounts, compared to 40% and 43% of Spotify and Apple Music users with premium or paid-for accounts, respectively.

MUSIC STREAMING BY DEVICE

% who have used a music-streaming service in the last month via…



More time is spent listening to radio than music streaming in 20 of our tracked markets, mostly in the European region where internet users tend to be older on average

14% of respondents say they discover new brands and products via ads heard on the radio

Question: In the past month, which of the following things have you done on the internet on a PC/Laptop, Mobile or Tablet? Used a music-streaming service **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

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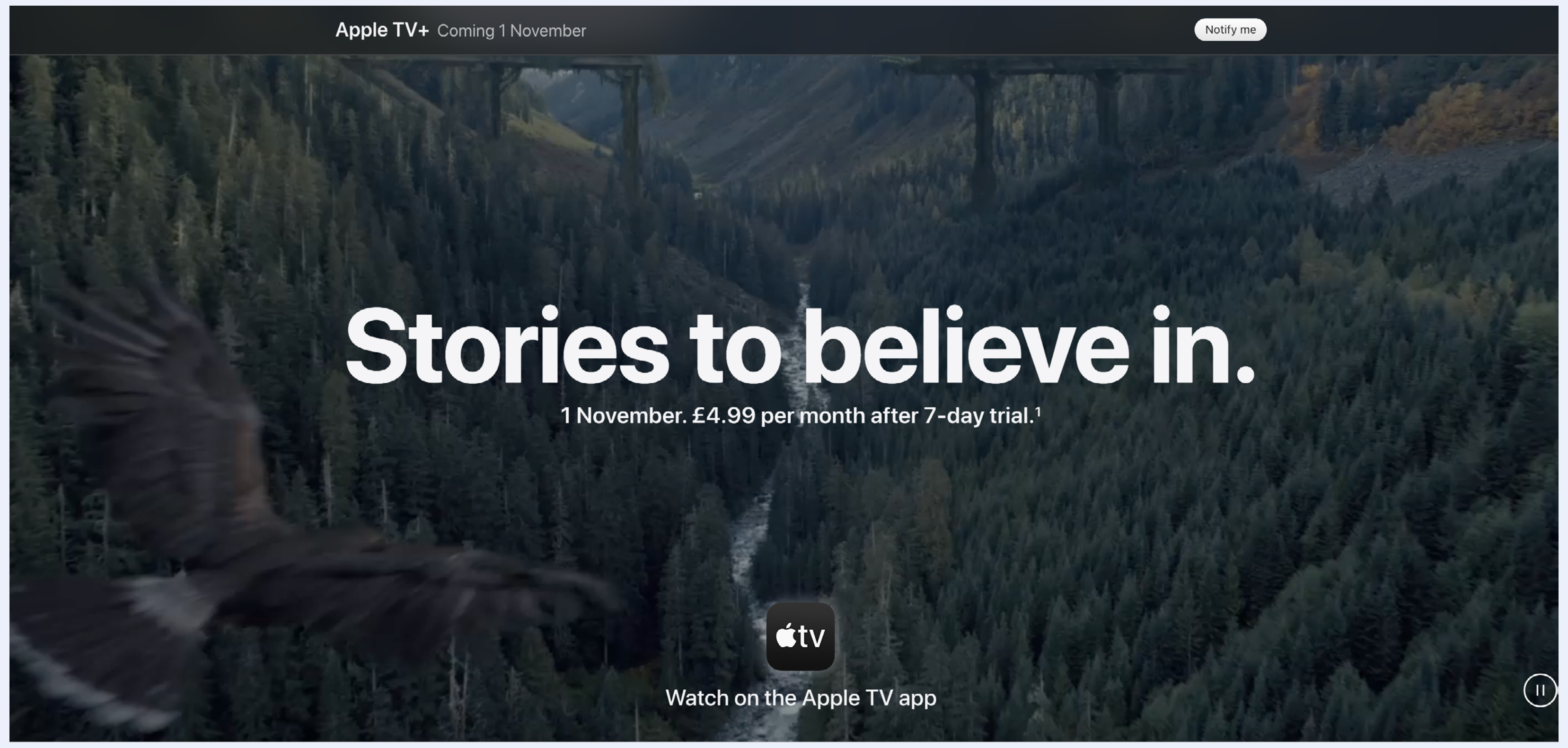
Out With the Old, In With the New



A fifth of internet users worldwide have used iTunes in the last month, rising to 38% in Vietnam

Apple **is closing iTunes** in the coming months. The app's core features will be split out over three new apps – Music, Podcasts and TV. iTunes has been due a rehaul for years; divvying the app up should help it load faster, run more smoothly and be better focused on individual tasks. Just as important is **the launch of Apple's TV+ service**. Given the amount of money at stake, Apple needed to have a standalone TV app ready for the launch, rather than hide it deep in a sub-menu of an app built for an entirely different type of media.

The Streaming Market

GLOBAL MUSIC STREAMING COMPETITION

% who have used the following music streaming services in the last month

ASIA PACIFIC

QQ Music[1]	32%
Google Play Music	28%
Kugou[1]	23%

EUROPE

Spotify	27%
Google Play Music	18%
iTunes	15%

LATIN AMERICA

Spotify	53%
Google Play Music	37%
Deezer	15%

MIDDLE EAST AND AFRICA

SoundCloud	43%
Google Play Music	39%
iTunes	23%

NORTH AMERICA

Spotify	27%
iTunes	23%
Pandora[2]	21%

[1] China, Hong Kong and Taiwan only

[2] U.S.A. only

In our Global Music Market **report**, we found that Spotify emerged as the dominating force in the music streaming business. In the 41 markets GlobalWebIndex tracks named music-streaming service engagement, Spotify is the most popular music service in 24 of them.

In three out of the five regions, Spotify tops the charts, being particularly popular in Latin America (53% use it monthly). Even in APAC (18%) and the Middle East and Africa (17%), where Spotify typically struggles against more localized competitors, monthly engagement is growing.

Spotify recently **acquired** SoundBetter, a music production marketplace for artists, engineers and producers, continuing its plan to build a "double-sided" business, where both music makers and music listeners can be monetized. SoundBetter's database of musicians spans 176 countries worldwide, and amongst its tens of thousands of audio professional members, it boasts dozens of Grammy Award winners.

¾ of internet users in the Philippines use Spotify monthly

16-24s in MEA are 5.3x the global average to use SoundCloud monthly

> SoundBetter offers tools for talent discovery, project management, payment facilitation, and a review system that has elevated transparency and trust in a reputation-based music production industry.
>
> **Spotify**

Question: In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way. **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

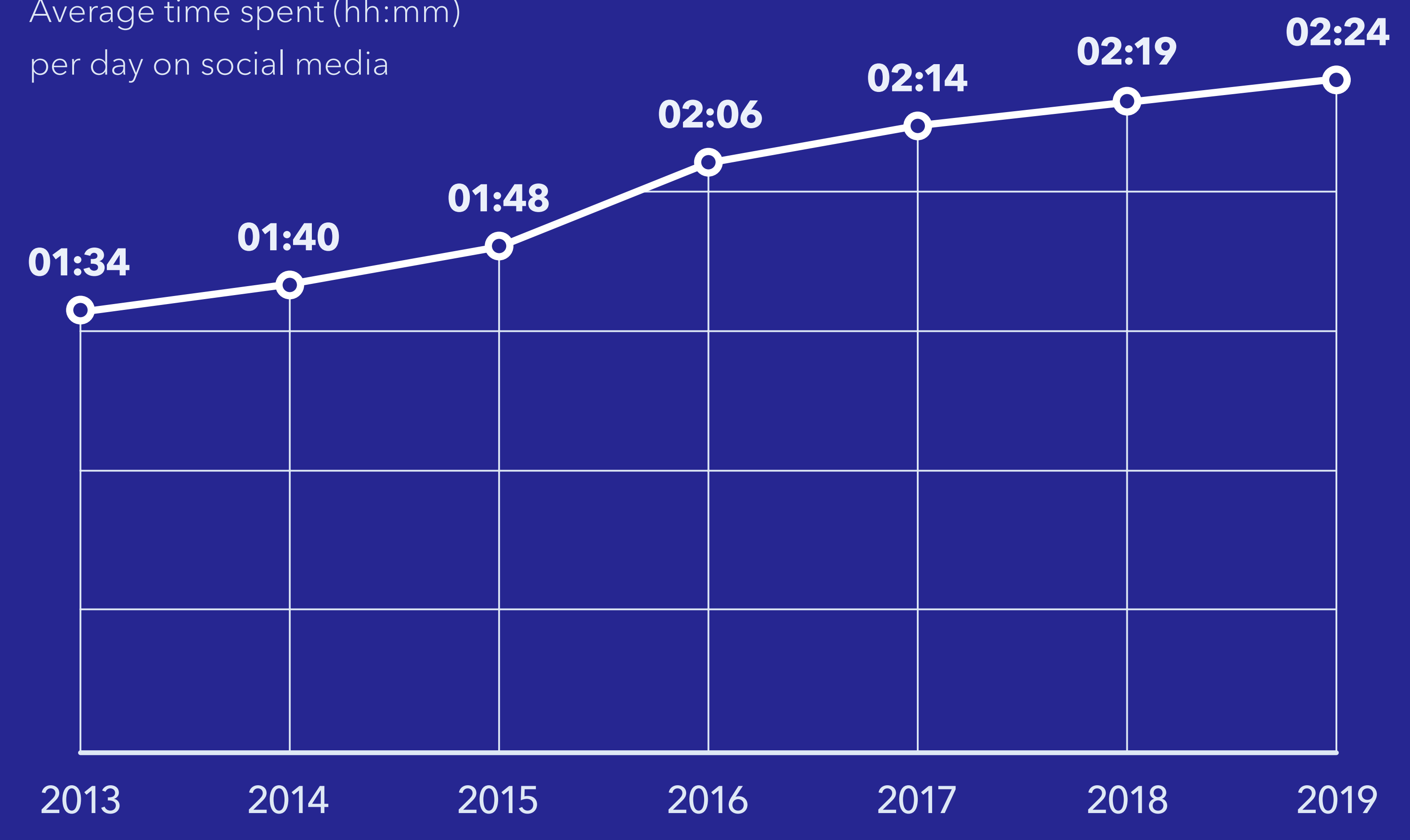
04

Entertainment

Social Entertainment

SOCIAL MEDIA ENGAGEMENT OVER TIME

Average time spent (hh:mm) per day on social media



Question: On an average day, how long do you spend on social media? **Source:** GlobalWebIndex 2013-2019 **Base:** 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), and 230,936 (H1 2019) Internet users aged 16-64

Social Entertainment Behaviors

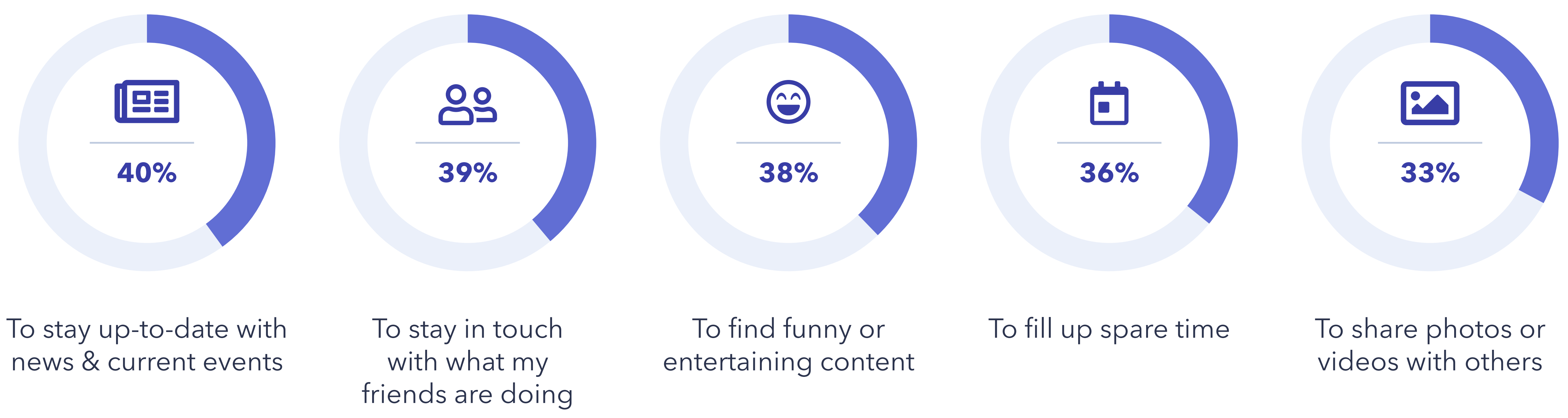
As we've already seen, digital music and TV streaming services are growing, but they have a second home: social media. As part of a trend of social behavior moving from sharing status updates toward more purposeful activities, and with 38% of internet users saying they go to social to find entertainment and funny content, **social media platforms have evolved into content hubs.**

Underpinning many of the trends in this report, social media has taken entertainment to the next level. Social networks introduced the idea of "being social" as something you do in isolation, maybe at the expense of anything else. **But more and more we see socializing as a natural corollary to something else, and the entertainment brands seeing the most success are the ones who have an engaging product complemented with and enhanced by these social features.**

Overall, the younger the audience, the more likely they are to use social media for entertainment purposes. But it's important not to generalize; **84% of 55-64-year-olds say they have watched a video clip in the last month, to name one example.** The content type where we see the largest age gap – celebrity networking/following – still attracts 31% of the oldest audience we surveyed. This demonstrates the cross-demographic appetite for online video, and the potential for engaging this age group with social video and influencers. So even though the younger groups are driving the social video trend, their older counterparts will catch up fast through the types of accounts they follow.

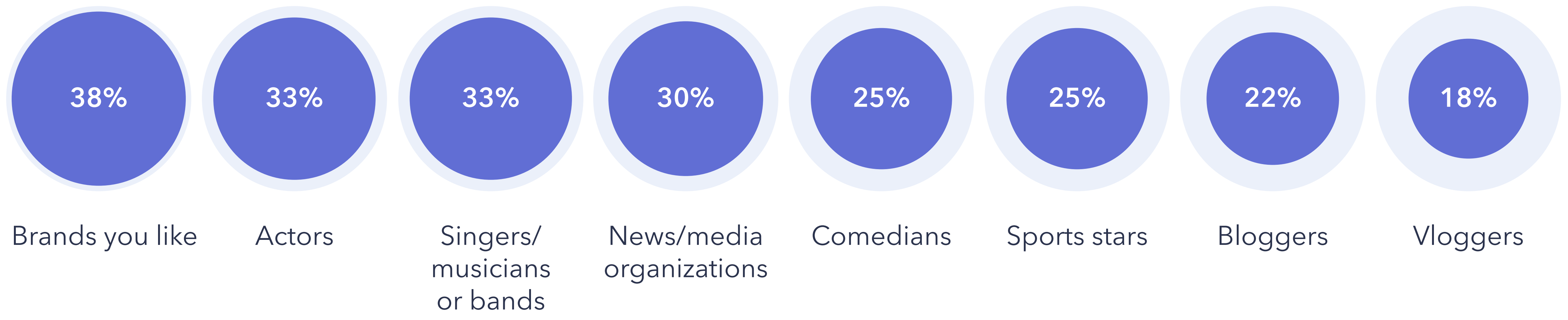
SOCIAL MOTIVATIONS

% who say the following are main reasons for using social media



TRADITIONAL ENTERTAINMENT FIGURES STILL THE MOST POPULAR

% of types of people who say they "follow" these types of people/organizations



Question: What are your main reasons for using social media? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

Question: Who do you follow on social media? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

• TREND IN ACTION •

Facebook Rolls Out New Video Tools

6 in 10 internet users outside of China have watched a video on Facebook, Twitter, Snapchat or Instagram in the past month

1 in 4 Facebook visitors have watched something on Facebook Live in the past month

This month, Facebook **announced** a number of updates aimed at video creators and publishers, including changes to live video broadcasting, Facebook's Watch Party, and Creator Studio. The highlights include better ways to prep for and simulcast live broadcasts, ways to take better advantage of Watch Party events, new metrics to track video performance and a much-anticipated option to schedule Instagram/IGTV content for up to six months in advance.

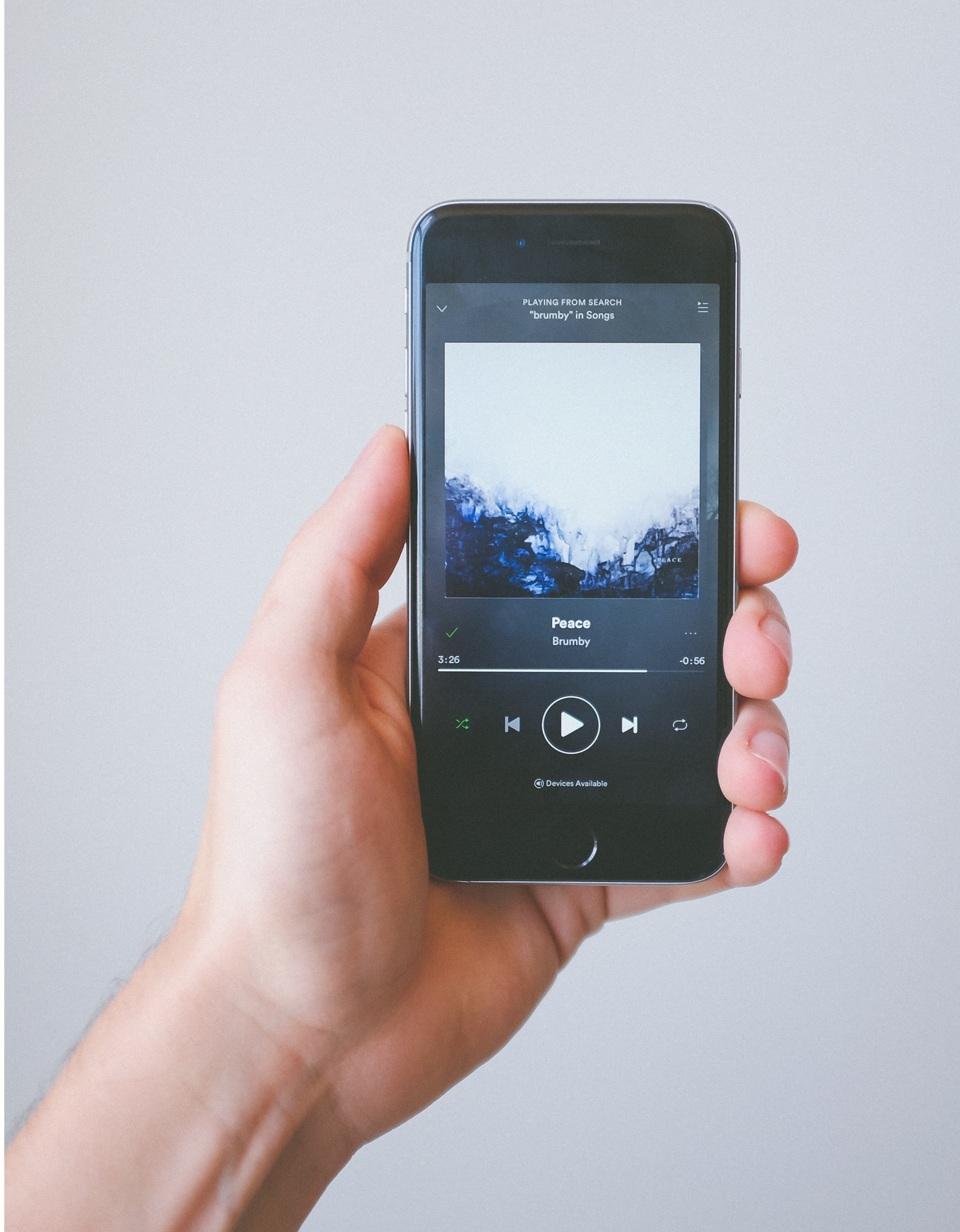
Social Music

Much of our time using paid music subscriptions is largely spent listening alone, despite music experiences such as concerts, clubs and soundtracks being inherently social activities. YouTube and SoundCloud have comments; Spotify has its desktop tracker of what friends are listening to and the ability to make playlists collaborative; and Apple Music has its personalized playlist 'Friends Mix'. However there is still a nagging feeling that more could be done.

So far, it has proved tricky to make social music streaming a reality. Back in June 2018, Facebook users in select countries could add songs to the videos they shared and posted, as well as use the feature "Lip Sync Live" to, surprisingly, lip sync songs live. Such features were highly anticipated ever since Facebook started licensing deals with major publishers and record labels earlier that year.

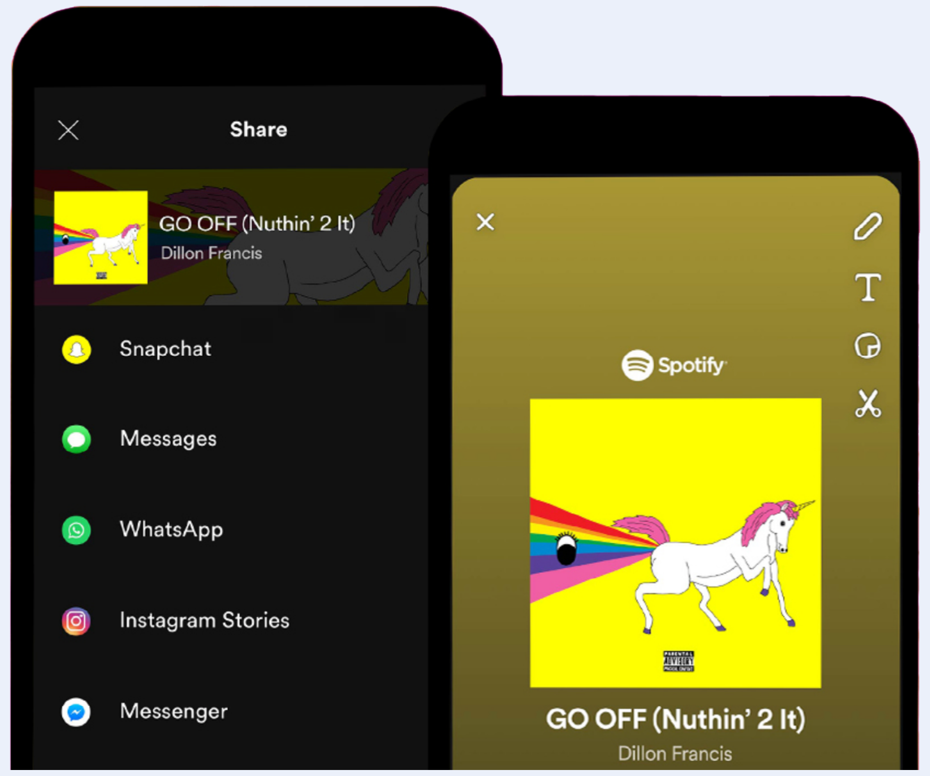
Facebook has little motivation to become a streaming space in a traditional sense; its move was always going to be one that focused on creating social experiences centered around connections and personal expression. In the West, YouTube is really the only global streaming service meeting this self-expression need with social features, as well as TikTok, which has become massively popular with younger demographics and amassed more than 1 billion downloads around the world.

In the West, YouTube and TikTok are really the only global streaming services meeting this self-expression need with social features



• TREND IN ACTION •

Late to the Snapchat Party



Spotify users are 1.5x the average internet user to have visited Snapchat in the last month

Earlier this year, Spotify has prototyped an unreleased feature called "Social Listening" that allowed multiple people to add and listen to songs in real-time by scanning a QR-style code. Spotify has stripped down its own social features in the past, eliminating the in-app messaging inbox and instead encouraging users to share songs over third-party messaging apps. But Spotify seems to be pushing the social aspect of their service more as of recently; it is now allowing users to share their favorite music or podcasts to Snapchat. Spotify isn't the first music service to add an option to share to Snapchat – iHeartRadio introduced it alongside Facebook and Instagram Stories. Separately, Snapchat and Spotify both made headlines outside of this new partnership; Spotify hired two high-profile executives with an eye on developing its sports and news coverage, and Snapchat released a dedicated news channel for the 2020 U.S. election debates.

TikTok

Generally, younger consumers are the first to embrace new technologies and services, but eventually the critical mass will start pouring in

TikTok members are 1.35x the global average to say meeting new people and making new connections is an important reason for them using the internet

ByteDance took Douyin overseas as "TikTok" in 2017, and cleverly merged it with Musical.ly in 2018 for $1bn, giving it a headstart in the U.S. market. But it's important to note that Douyin and TikTok are actually separate entities, using different systems and at very different stages of development. Currently, 57% of Douyin and TikTok's joint user base come from China, so the influence of our Chinese sample on demographic data cannot be overstated.

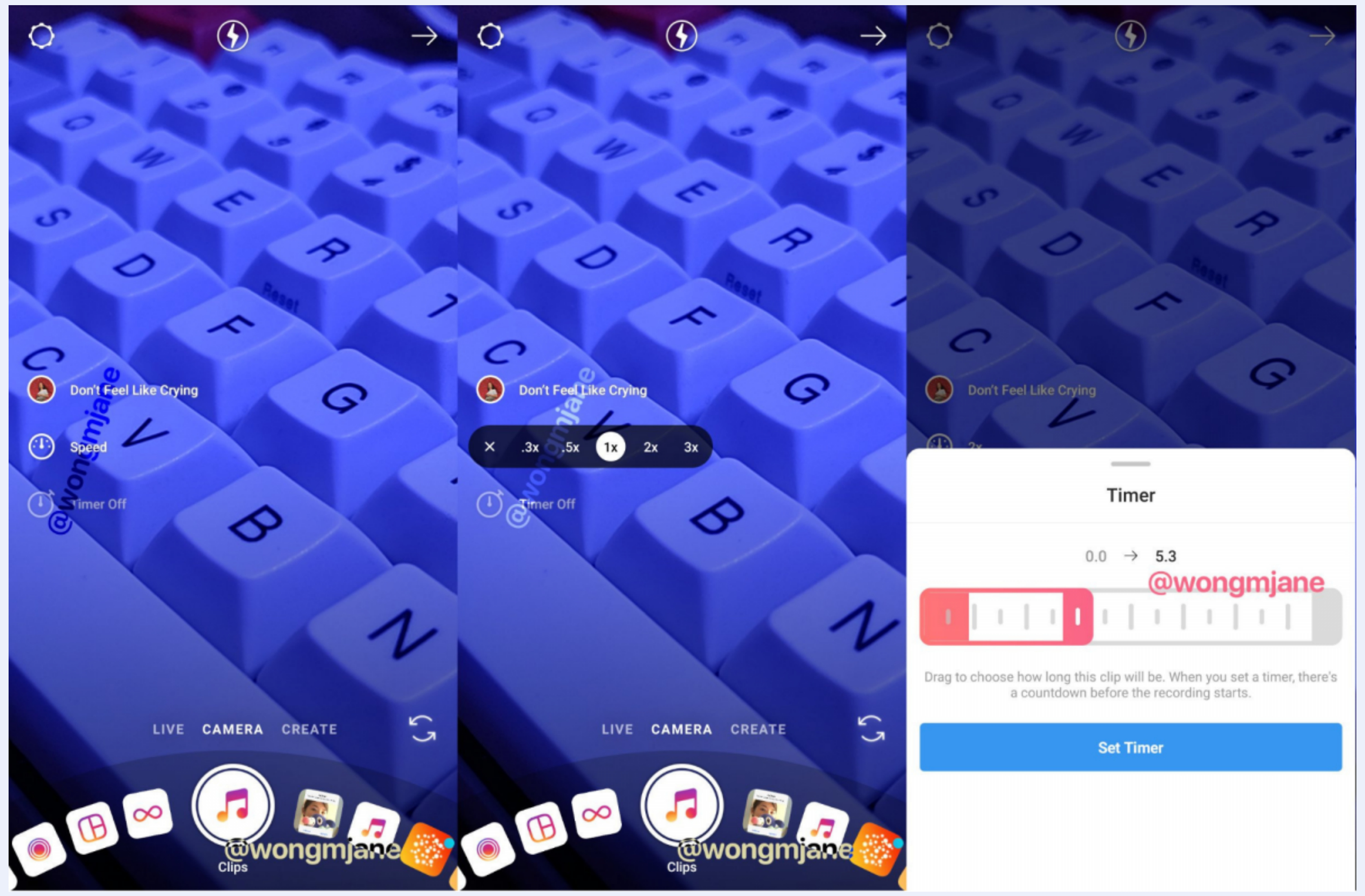
For example, **whereas more than 60% of TikTok members fall into the 25-44 age bracket in China, outside of China, 43% of TikTok-ers are 16-24 years old.** While TikTok tends to be synonymous with teenagers, there seems to be a growing indication that the TikTok user base has expanded beyond just teens. In countries such as China, Indonesia, Malaysia, Saudi Arabia and the UAE, membership among 15-34-year-olds is actually higher than among 16-24s. The demographic shift is reminiscent of Facebook and Instagram. As the average age of TikTok members gradually increases, it will present an interesting problem for ByteDance, who will want to maintain its impressive growth without driving away their youngest and most desirable engagers.

Given that nearly half of users say they are easily swayed by other people's opinions, and 3 in 10 say that lots of "likes" or good comments on social media are a purchase driver, **third-party validation is a crucial part of the TikTok experience.** There are things to be learned from the fall of its predecessor, Vine. Vine's biggest failure was its poor treatment of the creator community. By not giving them a way to generate revenue, they left influencers and high-profile celebrities with little choice but to venture off to Instagram, YouTube and Snapchat. The rich and frequently updated content of TikTok will be a vital element for user experience, so keeping this creative community happy and expressive is essential. Encouraging peer support, collaboration, and a friendly and supportive platform ethic should be high on TikTok's agenda.

For consumers who are craving either the creative space or the social connection TikTok offers, brands should be wary of heavy-handed intrusions. This is especially the case now that TikTok has released a new feature that lets users shop for products inside the app. Experimentation, creativity and fun should be at the heart of any TikTok campaign, so as not to alienate or aggravate a highly engaged audience.

• TREND IN ACTION •

Making an Instagrab



Instagram looks into developing a new feature, called "Clips", for Stories that allow users to create videos in a way that on the face of it seems similar to how content is made on TikTok. Discovered by reverse engineer Jane Manchun Wong, "Clips" lets users upload videos on their Stories that are recorded in snippets and then edited together. The feature also seems to allow users to overlay music over their clips, and adjust the length and speed of those video segments.

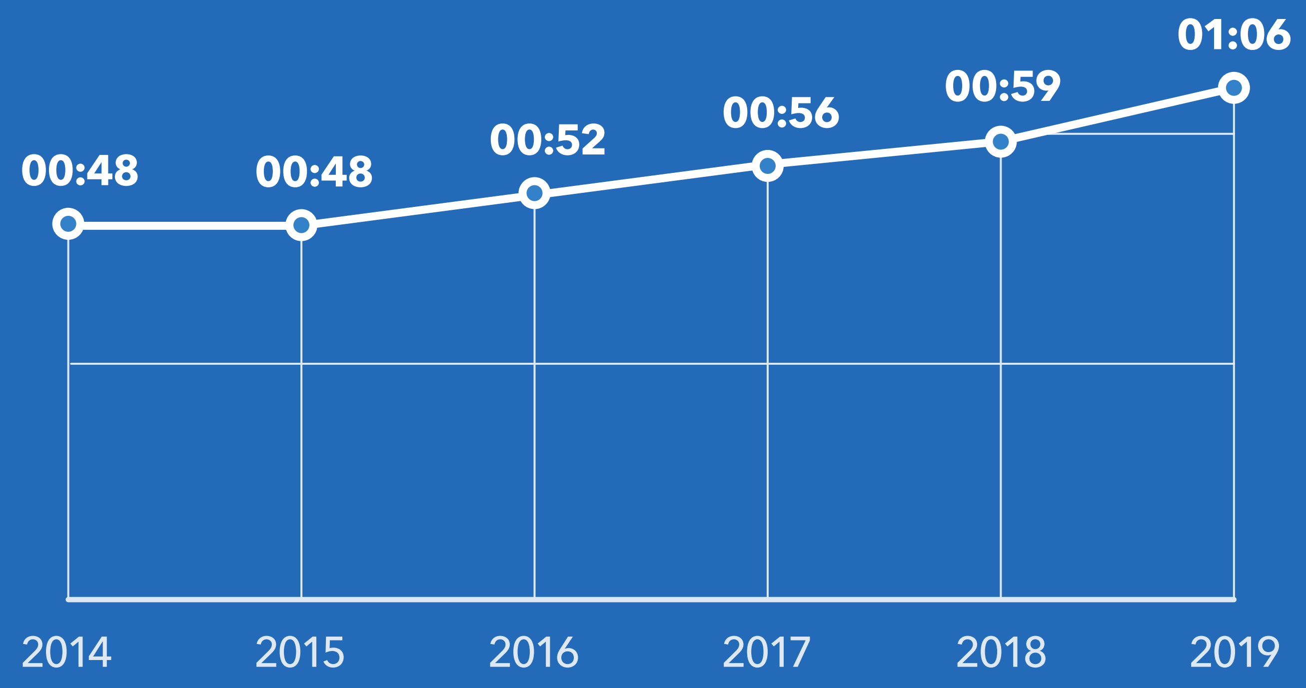
05

Entertainment

Gaming

GAMING CONSOLE ENGAGEMENT OVER TIME

Average time spent (hh:mm) per day on gaming consoles



Question: On an average day, how long do you spend on games consoles? **Source:** GlobalWebIndex 2014-2019
Base: 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), and 230,936 (H1 2019) Internet Users aged 16-64

Gaming

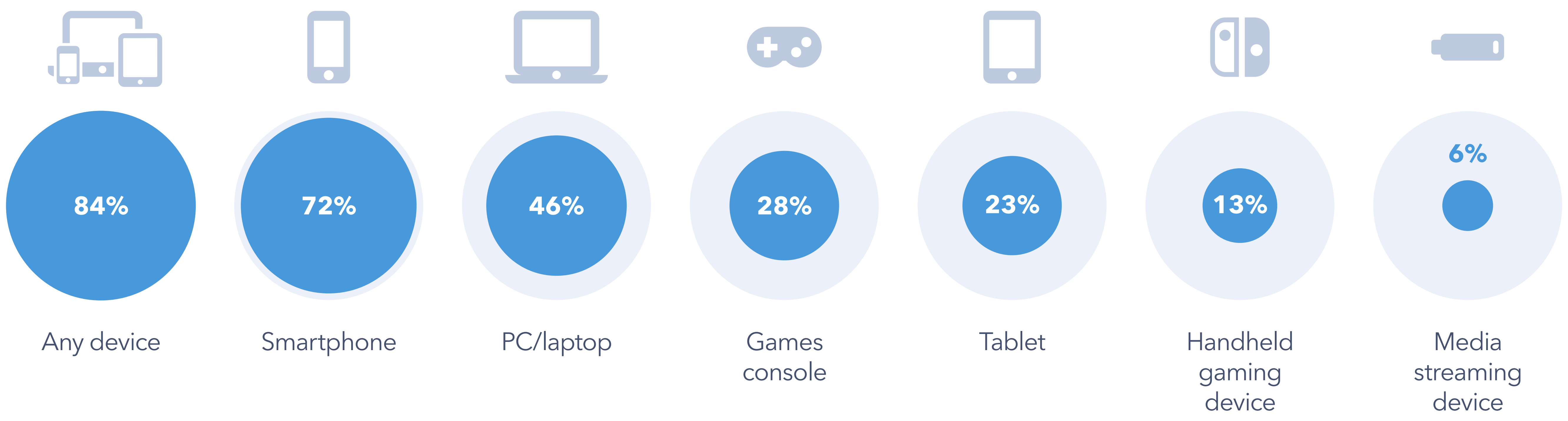
Gaming is playing an increasingly prominent role in the entertainment industry, and has become unquestionably mainstream: **92% of internet users game on at least one device.**

In recent years, we've seen widespread migration of gaming online, the emergence of online multiplayer platforms, game streaming, and the popularity of freemium gaming platforms, both on mobile and PC. Seen as a whole, the pattern is that gaming has become more diversified, casual, less dependent on dedicated hardware as it's mainstreamed. This has hurt console gaming and greatly boosted mobile gaming.

Smartphone gaming has been leading, boosted by almost universal ownership at a global level. **This genre of entertainment is now among the most truly cross-demographic activities tracked by GlobalWebIndex.** In fact, thanks to mobile and PC gaming, it's difficult to find a region or demographic in which the majority of individuals aren't gaming in some form or another.

GAMING DEVICES

% who use the following devices to play games at home

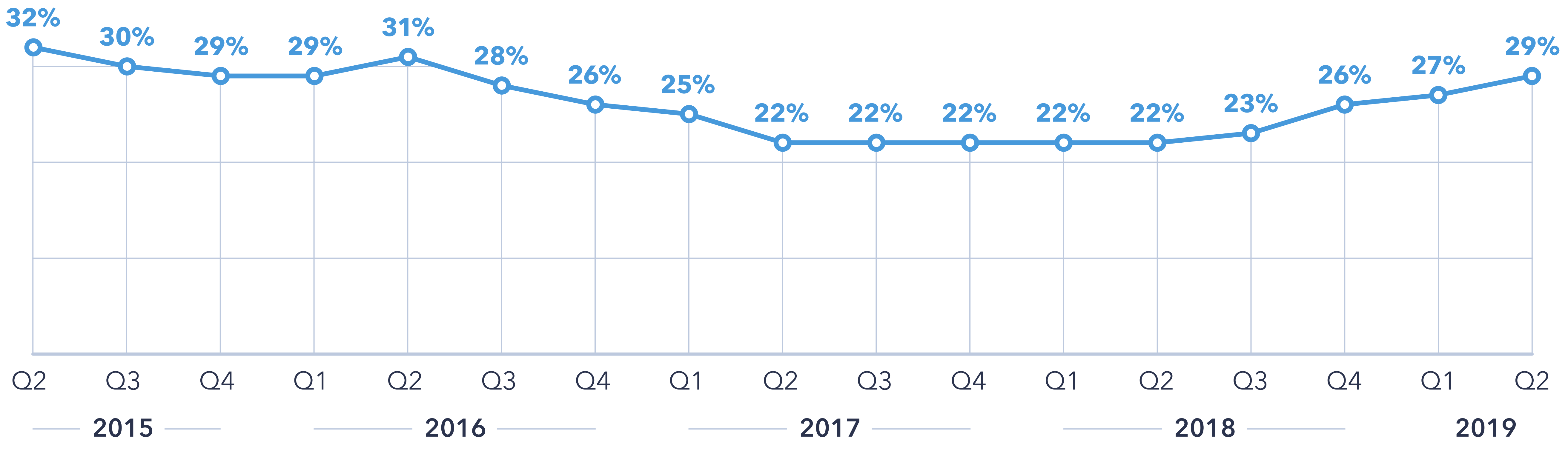


Question: Thinking about the devices listed below, can you tell us which you have at home and have used to play games? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

Console Gaming

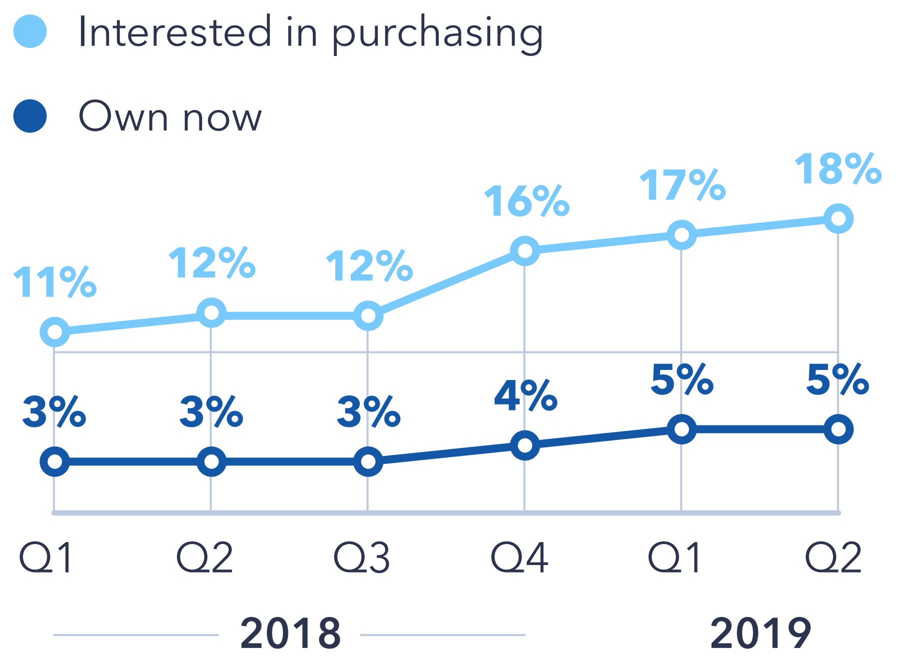
THE CONSOLE COMEBACK

% who say they use a games console to play games



SWITCHING TO THE NINTENDO SWITCH

% who either currently own or are interested in purchasing a Nintendo Switch



In recent years, we've reported a year-on-year decline in those using their console to play games. **But there are signs that not only has the decline stabilized, but console gaming might be making something of a comeback.** Thanks in part to battle royale games like Fortnite, Apex Legends and PUBG, as well as innovative and adaptable new consoles like the Nintendo Switch, **there has been a 32% increase in those saying they use a console to play games (from 22% in Q2 2018 to 29% in Q2 2019)**. These figures are hugely bumped up by Latin America – Mexico (53%), Colombia (41%) and Brazil (39%) are the top three markets for console gaming.

What could have a major impact on future console growth is the potential for cross-console play. While Microsoft and Nintendo have opened up their online networks in recent years, Sony has consistently blocked developer efforts to let games on the PlayStation Network interact with versions of those same games on other consoles (though many PS4 games do allow cross-platform play with PC and mobile phone versions). The issue has gained increased visibility recently as Fortnite players on Nintendo Switch have discovered that playing the game on PS4 permanently locks their existing game accounts from compatibility with other consoles.

Sony has finally announced it's opening up the PS4 to cross-console play, following the likes of Microsoft and Nintendo. This cross-play integration may signal the start of fully adaptable gaming that isn't bound to a home console.

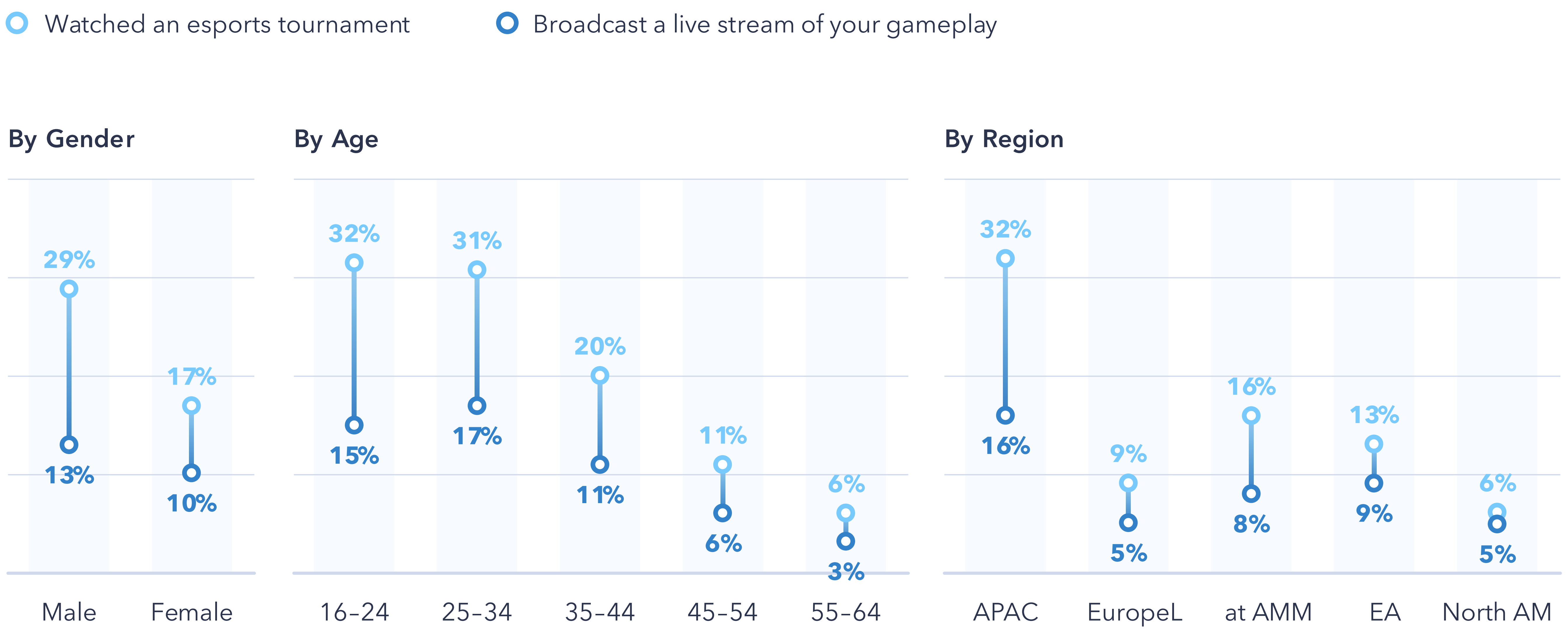
What could also hurt the console market is the Trump administration. With U.S. tariffs on items including game consoles coming in on the 15th December, this could do potentially serious long-term damage to the U.S. and global console market despite falling on the right side of Black Friday and early holiday shopping season.

Question: Which of the following devices do you personally own?/Thinking about the devices listed below, can you tell us which you have at home and have used to play games? **Source:** GlobalWebIndex 2015-2019 **Base:** 506,556 Internet Users aged 16-64

Esports

SPECTATOR GAMING

% of gamers who have done the following in the last month



With gaming activities migrating online, a whole host of behaviors can now be considered gaming, even if it doesn't involve picking up a controller and playing. The very idea of "gaming entertainment" has evolved and expanded – from entering gaming tournaments and competitions yourself, to sitting and watching others play your favorite games.

The rise of spectator gaming has been quick to make an impact in this space. Whether it's watching a live gaming stream, an esports tournament or broadcasting a live stream of your own gameplay, **all three activities have increased consistently over the last few years**. Three in ten global internet users aged 16-64 now say they've watched a live gaming stream recently, rising to 43% of 16-24s. Among our youngest cohort, 32% have also watched an esports tournament and 15% recently broadcast a live stream of their own gameplay.

Three in ten of 16-34 year-old console gamers watch esports tournaments. Its demographic is narrow but highly desirable: young, male and skewing affluent. **The bulk of gaming live-stream watchers are currently from the Asia-Pacific region, where markets like South Korea helped instigate the rise of spectator gaming**. Esports is also booming throughout India, aided by the proliferation of fast broadband connections and an outstanding number of under 25s (no country has more young people).

Question: Which of the following gaming-related activities have you done in the last month? **Source:** GlobalWebIndex H1 2019 **Base:** 230,936 Internet Users aged 16-64

Twitch

Live streaming video platform Twitch, owned by Amazon, has emerged as one of the first of its kind to capitalize on the surge in gaming and gaming entertainment being hosted online.

The live streaming video platform, which appeals to a broad range of demographics, primarily broadcasts live-stream gameplay, in addition to music broadcasts, esports broadcasts, creative content, and most recently, "in real life" streams. Watching Twitch rise to the top has been impressive, to say the least. Back in October 2013, the website had 45 million unique viewers, and by February 2014 it was considered the fourth largest source of peak internet traffic in the U.S., accounting for 40% of all live-streaming online **according** to online analytics site Qwilt.

And traffic continues to grow; in 2019, Twitch experienced its second biggest quarter to date, capturing more than 70% of all live hours watched compared to its rivals, who made up the remaining 30%. Competition is increasing, however, Discord, Valve, Douyu, HUYA and Mixer are doing what they can to stake their claim.

Microsoft's Mixer is arguably one of the most pressing rivals to Twitch, especially after one of Twitch's biggest stars Tyler "Ninja" Blevins (who had a fanbase of 14 million followers) decided to jump ship. Despite this, Twitch still remains the dominant force in terms of user traffic and sponsorship opportunities for streamers, and Ninja's high profile move is only a testament to Twitch's success in this respect.

Twitch is a community-driven platform, and live streams serve as the meeting ground for many communities. Twitch streams in particular, have been found to act as virtual hangouts in which informal communities emerge, socialize and participate. Unlike YouTube, Twitch has focused a lot of its attention on its community, developing social features that YouTube doesn't have. The 'clipping' feature, for example, allows audiences to create short clips that appear on the author's channel to show who they are and what to expect on their channel. These clips are widely used by people to boost their profile and get discovered.

And it's this sense of community and belonging that's reflected back in Twitch users' online behavior:

- 58% of Twitch users have posted a review of a product, company or service in the past month, or posted a comment in a forum, in the last month, 1.4 times the global average.
- 45% of Twitch users say they would buy a product or service simply for the experience of being part of the community built around it, 1.45 times the global average.
- The most distinctive role that they think brands should play in the consumer's life is to connect them with other fans of the brand, 1.5 times the global average.

This desire for connection, and a community which fosters it, also has important consequences on Twitch users' unique attitudinal profile – while they are more likely to agree with typically status-seeking traits, they are less likely to be image conscious.

06

Entertainment

Brand Interactions & Entertainment

Brand Interactions

BRAND DISCOVERY ROUTES

% who say they find new brands via the following

Search engines	37%
Ads seen on TV	35%
Word-of-mouth recommendations	31%
Ads seen on social media	28%
Brand/product websites	27%
Ads seen on websites	26%
TV shows/films	26%
Recommendations/comments on social media	24%
Ads seen on mobile or tablet apps	23%
Consumer review sites	23%
In-store product displays or promotions	22%
Product comparison websites	21%
Ads seen before online videos or TV shows	20%

Entertainment has a crucial role to play in the discovery of new brands and products, whether through TV, vlogs or films. **Among the brand discovery channels we track, TV ads remain one of the most impactful, with 35% reporting that they discover new brands or products from them.** Spending the longest time watching linear TV each day, older age groups are most responsive to TV ads. 43% of 55-64s discover new brands that way, though 32% of 16-24s say the same.

A quarter discover brands via product placements in TV shows or movies, and a fifth discover brands through ads seen before online videos or TV shows. In contrast, cinema ads come in toward the bottom of the list. Even for those who go to the cinema each month, this share doesn't rise above the 20% mark. Digital media has brought new contenders in the battle for consumers' attention, but how do these compare as a source of brand discovery?

If we look at vlogs and their core audience of Gen Zs (16-22 year-olds), 62% have watched one in the last month, but only 19% say they discover brands through them. For the time being, it doesn't look as if viewers see vlogs as a place to discover brands – which ought to be surprising, given the massive investment in sponsored and partnered video content brands have made in recent years.

The ease with which digital media allows users to avoid ads on entertainment channels has shifted the emphasis somewhat onto brands to create their own entertainment. **A quarter of internet users have watched a branded video in the past month.** Downloading branded apps (18%) and playing branded games (14%) have a limited, but consistent uptake.

They may be minor activities in their own right, but more than half of internet users are doing at least one of the three each month. That's a significant slice of the online population looking to brands for entertainment and shows the potential rewards in creating content that users will seek out. As we've seen across the purchase journey, these behaviors support the case for continued investment in owned channels.

Question: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex H1 2019 **Base:** 279,055 Internet Users aged 16-64

Marketing to Second-Screeners

81% of online consumers are on their mobile while watching TV – using social media, messaging friends and reading emails are the most popular second-screening activities

MARKETING TO SECOND-SCREENERS

% who say they find new brands/research products online via these channels

● Brand Discovery ● Online Product Research

Interactive Viewers		IDX
Posts or reviews from expert bloggers	21%	1.36
Micro-blogs (e.g. Twitter)	19%	1.40

Socializers		IDX
Endorsements by celebrities or well-known individuals	17%	1.16
Social networks	44%	1.14

Product Searchers		IDX
Deals on group-buying websites	15%	1.37
Online pinboards (e.g. Pinterest)	14%	1.35

Readers		IDX
Stories/articles in printed newspapers /magazines	15%	1.21
Question & Answer sites	22%	1.14

Definitions for each segment are as follows:

Interactive Viewers – Sharing opinions of TV shows, searching for information related to watched content, or interacting with online content of the TV show while watching TV
Product Searchers – Searching for products to buy while watching TV
News Readers – Reading the news online or the news while watching TV
Socializers – Using social networks or messaging friends while watching TV

Question: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex H1 2019 **Base:** 48,803 (Interactive Viewers), 45,158 (Product Searchers), 78,783 (Readers) and 87,746 (Socializers) internet users aged 16-64

Notes on Methodology

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

OUR RESEARCH

Each year, GlobalWebIndex interviews over 575,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers**. 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.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex 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**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

Unless otherwise stated, this report draws insights from GlobalWebIndex's H1 2019 wave of research across 45 countries, with a global sample of 279,055 respondents.

Argentina	3,138
Australia	8,094
Austria	2,580
Belgium	2,556
Brazil	4,721
Canada	4,575
China	30,565
Colombia	2,644
Denmark	2,521
Egypt	3,558
France	10,187
Germany	10,231
Ghana	1,837
Hong Kong	3,642
India	15,181
Indonesia	3,794
Ireland	2,529
Italy	10,548
Japan	3,681
Kenya	1,982
Malaysia	3,069
Mexico	5,252
Morocco	1,985
Netherlands	2,635
New Zealand	2,578
Nigeria	2,057
Philippines	3,291
Poland	3,725
Portugal	2,580
Romania	2,627
Russia	4,430
Saudi Arabia	2,950
Singapore	5,432
South Africa	3,056
South Korea	2,565
Spain	10,184
Sweden	2,616
Switzerland	2,580
Taiwan	3,573
Thailand	3,172
Turkey	3,049
UAE	3,531
UK	20,248
USA	50,129
Vietnam	3,177

Notes on Methodology

ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.** This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

INTERNET PENETRATION RATES

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data

Argentina	78%
Australia	88%
Austria	88%
Belgium	89%
Brazil	71%
Canada	94%
China	59%
Colombia	66%
Denmark	97%
Egypt	54%
France	85%
Germany	88%
Ghana	48%
Hong Kong	91%
India	42%
Indonesia	39%
Ireland	87%
Italy	62%
Japan	92%
Kenya	43%
Malaysia	83%
Mexico	69%
Morocco	69%
Netherlands	93%
New Zealand	93%
Nigeria	36%
Philippines	64%
Poland	79%
Portugal	78%
Romania	72%
Russia	80%
Saudi Arabia	83%
Singapore	85%
South Africa	62%
South Korea	95%
Spain	87%
Sweden	96%
Switzerland	96%
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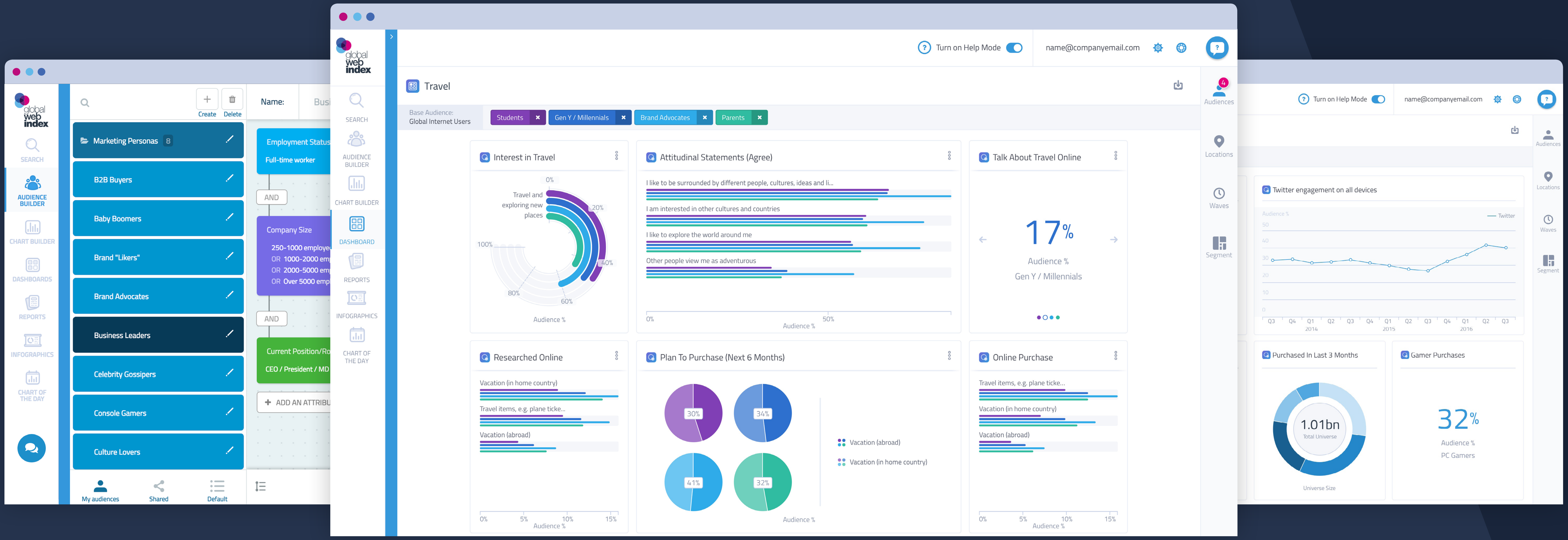

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