

3 Key Trends Shaping the Media Landscape This Year

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Karin von Abrams

As the coronavirus spread in H1 2020, we might have expected radical changes in the media behavior of consumers around the world. But for the most part, they didn't happen. That's just one insight to emerge from eMarketer's newly released Global Media Intelligence Report for 2020, a detailed look at internet users' engagement with digital and traditional media in 42 major markets, produced in collaboration with Starcom and GlobalWebIndex.

Many significant shifts are taking place, though—in device ownership, takeup of digital entertainment options, and time spent with various media, for example. Below are some of the key trends shaping the media landscape this year.

Ownership of PCs and Tablets Is Declining in Many Countries

Smartphones are consolidating their position as the primary digital device worldwide, and as a result, larger-screen devices may appear destined for a secondary role.

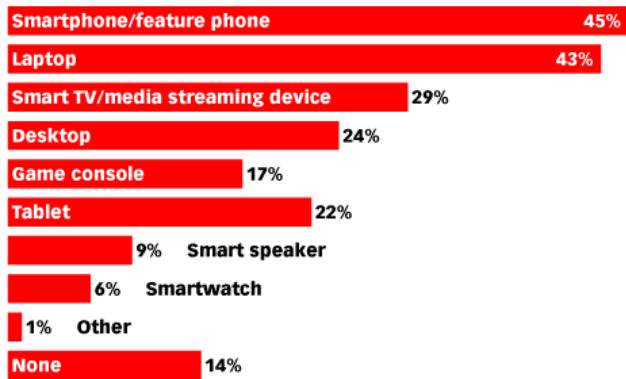
Between H1 2019 and H1 2020, ownership of desktops, laptops, and/or tablets declined most sharply in developing markets, including Brazil, China, Egypt, and India—all countries where the focus has long been on mobile devices and services. But the same trend appeared to a

lesser degree in several other countries too, including France, Russia, Sweden, and the US.

That said, PC and tablet penetration remains consistently higher among older, affluent internet users—a top target audience for many marketers. In addition, many consumers have spent more time with PCs since the pandemic began. In the US, for example, 43% of internet users polled by GlobalWebIndex in May 2020 said their laptop time had increased, and 24% reported spending more time on a desktop.

Devices US Internet Users Have Been Spending More Time Using Since the Coronavirus Pandemic, May 2020

% of respondents



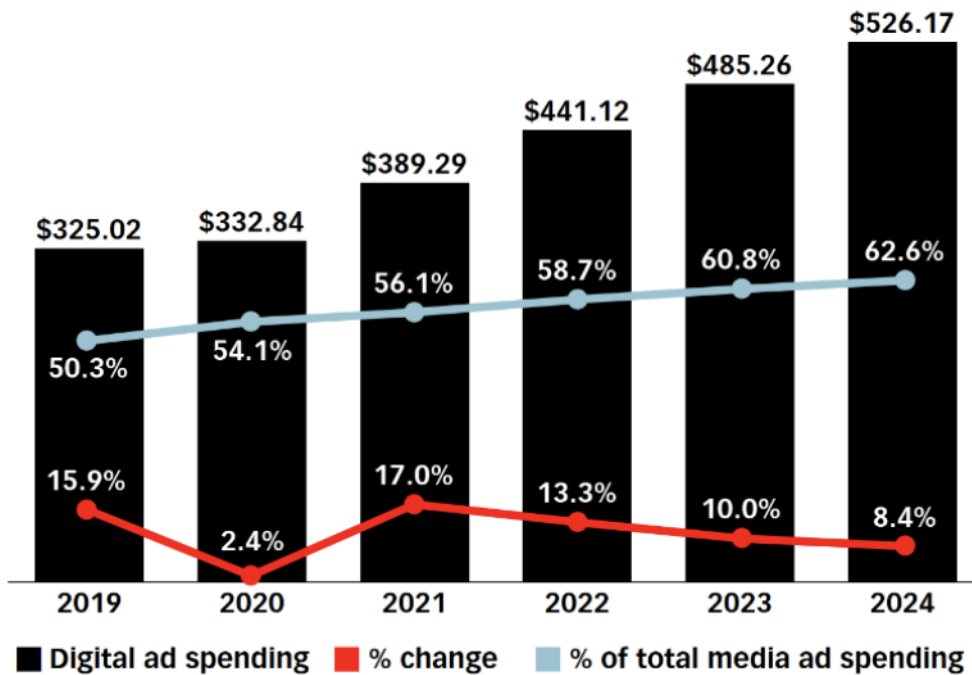
Note: ages 16-64
Source: GlobalWebIndex, "Coronavirus Research: Multi-Market Research Wave 4," June 2, 2020

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As a result, advertising on desktops and laptops will still contribute significantly to digital ad spending overall. And digital ad spending—unlike outlays on traditional media—is set to climb this year despite the massive market impact of the pandemic. eMarketer estimates that digital ad spending worldwide will rise 2.4% this year to \$332.84 billion.

Digital Ad Spending Worldwide, 2019-2024
billions, % change and % of total media ad spending



Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other internet-connected devices; includes classifieds, display (banners/static display, rich media, sponsorships and video, including advertising that appears before, during or after digital video content in a video player), search (paid listings, contextual text links and paid inclusion), in-game advertising, newsletter advertising and email

Source: eMarketer, June 2020

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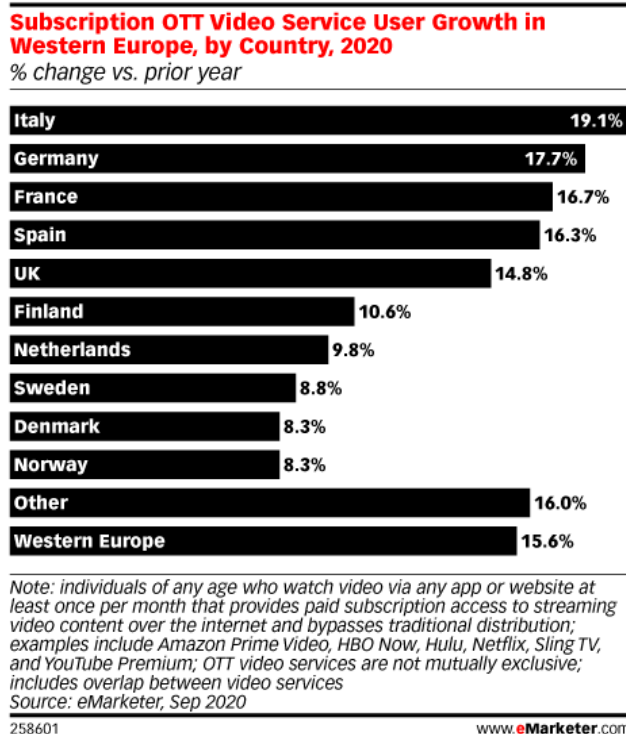
In 2020, digital ad spending worldwide will make up 54.1% of total media ad spending, per eMarketer’s forecast.

Digital Video Continues to Close the Gap with Broadcast TV

In many parts of the world, the share of internet users watching digital video, either free or paid-for, now equals or surpasses the share watching live TV. In particular, GlobalWebIndex found sizable increases in penetration of subscription video-on-demand (SVOD) in many markets. These increases were likely due in part to expanded offerings from Netflix and other providers, but SVOD also seems to have

benefited from consumers' desire for quality entertainment while stuck at home.

That data confirms eMarketer's own forecasts of steady growth in subscription video viewing. For instance, we expect the number of people in Western Europe who use subscription over-the-top (OTT) video services to jump 15.6% this year—with even greater gains in the EU-4 countries.



In North America, Netflix alone is forecast to have more than 185 million users in 2020.

The Pandemic Is Likely Hastening the Decline of Print Media

Print audiences aren't shrinking everywhere, but print newspapers and magazines did register many of the most dramatic decreases in media engagement this year. In South Africa, for example, the share of internet users who'd read a print newspaper in the month prior to polling fell almost 10 percentage points, and magazine penetration plunged 17

percentage points. Significant drops were also seen in Colombia, Hong Kong, and Romania, among others.

The Global Media Intelligence Report is a concise yet detailed compilation of data and insights about internet users' traditional and digital media usage in 42 key markets worldwide. eMarketer PRO subscribers can read our 2020 edition:

Report by Karin von Abrams Oct 15, 2020

The Global Media Intelligence Report 2020

THE GLOBAL MEDIA INTELLIGENCE REPORT 2020

A Reference Guide to Consumers' Media Use in 42 Countries

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Karin von Abrams
Contributors: Amy Kelly, James O'Connell, David Shiner, Kathleen Shover, Sarah Pitt, Mike Puck, Morgan Rivers, Mike Pugh, Adam de Souza

