

Around the World: Media consumption milestones and diversions in different countries

Audio

On today's podcast episode, host Bill Fisher is joined by our analysts Paul Briggs and Paul Verna and GWI's chief research officer Jason Mander to discuss the latest Global Media

Intelligence report, outlining media consumption behaviors from around the world.

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Episode Transcript:

Speaker 1:

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Bill Fisher:

Hello, everyone. Welcome to Behind the Numbers Around the World, an E-marketer podcast made possible by Intuit Mailchimp.

It's Monday, October the 30th, and I'm your host, Bill Fisher. And it's my absolute pleasure to welcome you all to Around the World with the Global Media Intelligence Report 2023.

Welcome folks to a behind-the-numbers show that takes you around the world looking at what various countries are doing in the world of commerce, media, and advertising. And in this special one-off edition of the podcast, I have the honor of speaking to a stellar cast, that have helped produce our annual report that we affectionately refer to as GMI, or to give it its full name, the Global Media Intelligence Report. In today's show, we'll be looking at some media consumption milestones from around the world.

Paul Verna:

Particularly in North America, 26-plus percent adoption. And we've seen this in individual regions and individual countries where, I mean, the UK actually, it performs very strongly in that regard.

Bill Fisher:

Some trends that have changed from last year's report.

Paul Briggs:

But in 2023, the most recent five of the seven regions saw declines in podcast time. So there's something going on with demand for podcasts.

Bill Fisher:

And some things that haven't altered much at all.

Jason Mander:

I was not expecting that, and it does suggest there's something in the usability that isn't yet flying in that region.

Bill Fisher:

Okay, this is the 13th edition of this report. It's a teenager. It details media and device usage in 47 countries across seven regions around the world. We write this report in partnership with publicist media, Starcom and GWI. I have some guests who are going to talk to me about it. Let's meet them. First, we have GWI's chief research officer. He is Jason Mander. Hi, Jason.

Jason Mander:

Hey, how you doing?

Bill Fisher:

I'm good. Great to have you on the show. Next, we have our own principal analyst for Canada and regular contributor to Around the World. It's Paul Briggs. Hey, Paul.

Paul Briggs:

Hey, Bill.

Bill Fisher:

Great to have you on the show. And just to confuse matters and to confuse me, we have another Paul. This is our principal analyst and head of our advertising and media desk. It's Paul Verna, everyone. Hi, Paul Verna.

Paul Verna:

Hey, thanks for having me. I haven't been around the world in 80 days, so it's good to be here.

Bill Fisher:

Have you ever been around the world with me? I'm not sure you have.

Paul Verna:

I haven't. Honestly, I haven't. And I'm very happy to be the other Paul this time because Mr. Briggs looms large in this sphere and a lot of times he gets unfairly referred to as the other Paul. So that will be me today.

Paul Briggs:

Well, thanks for that, Paul.

Paul Verna:

Thank you, Paul.

Bill Fisher:

I'm going to use your full names at all times just to avoid any kind of confusion.

Paul Briggs:

Good idea. Yeah.

Bill Fisher:

It's interesting that we're greeting you to Around the World, Paul Verna, because in today's culture shock, we're going to talk about greetings. So this is where I take you to various countries around the world and give you some cultural facts or introduce you to some culturally specific norms. And because we've got an external guest and we're greeting Paul Verna to Around the World for the first time, I thought we could look at greetings.

It's quite common in most Western cultures to shake hands when you greet someone. This can be traced back as far as Ancient Greece. But the general understanding is that this came about when people used to carry swords around with them. They would have a scabbard on their left-hand side ready to draw their sword with their right hand. So if you met someone and you shook hands with your right hand, that was a sign that you were friendly and not about to try and stab them, which is quite nice when you're considering a greeting.

But what about some other greetings? You might be familiar with the Maori tradition in New Zealand of rubbing noses to say hello. But did you know that in Tibet it's common to greet

someone by sticking your tongue out at them? This comes from the 9th century, the time of an unpopular king called Langdarma. He was known for having a black tongue and also for being quite cruel. People in Tibet have long believed in reincarnation. So to prove that you weren't the king reborn, you would stick out your tongue, and this later came to signify respect and finally a greeting. So I guess I should say, well not say, but Paul and Jason, I should stick my tongue out at you. There you go. Welcome to the show. Any other interesting greetings that we have from anyone?

Paul Verna:

Well, so I grew up in a Spanish-speaking country where we say ciao to mean goodbye, and I still to this day have trouble wrapping my mind around the fact that Italians say ciao to say hello and goodbye.

Bill Fisher:

Those pesky Italians.

Paul Verna:

Yeah. And I have an Italian friend who every time I see him he says ciao. And I'm like, "Where are you going? You just got here."

Bill Fisher:

Yeah. Crazy people.

Paul Verna:

Yep.

Bill Fisher:

Anyway, now we've warmly welcomed all of our guests. It's time to talk about the topic at hand, GMI. Jason, I wonder, first of all, if you could just give us a real quick 30-second max introduction to what goes into making this report and what makes it all hang together.

Jason Mander:

Yeah, sure. Although I'm not quite sure how I follow that, but, yeah, in a nutshell, GWI interviews well over a million people across more than 50 countries each year asking them a

really wide range of questions about their digital lives and lifestyles. What devices have you got? What social media are you using? How are you interacting with brands? We trend all of that over time to see how attitudes, behaviors, and perceptions are changing. And once a year we dig through our entire archive, churn all of the numbers, and send it all over to make this report.

Bill Fisher:

And the two polls have helped write good chunks of this report, right? We're in the 13th year. Jason, I wonder if we can kick off with your take on the general sense when we look at this year's report compared with the 2022 edition. How does it compare?

Jason Mander:

Do you know what? This year things are actually quite stable. In previous years, we've been talking about the impact of things like COVID when the world turned upside down and behavior has changed quite profoundly. This year, given that we ask the same questions in the same way each year, we really can be confident that we can trend like for like, not too much has changed. The trends you would expect to continue largely are continuing. The declines that you might expect are carrying on a pace.

So it is just a couple of examples. It's not a surprise to say that smartphones are dominant, but they're continuing to get even more dominant, up to 97, 98% ownership in most places. PCs, laptops meanwhile steadily declining. Smart home devices are still climbing. They're not setting the world on fire, but sure, but steady progress, particularly in North America. Things like VR, still very niche. Again, North America are a bit of a hotspot, but by and large, they're still a very, very small thing. And the world is still multi-networking. Over half the people we survey in all of the seven world regions are using at least five social networks each. Some of them far more than that. In Latam, as many as 80% multi-networking across at least five services.

So in many ways the stories are the same or continuing on the same track this year, which does make those milestones and those reversals that we're going to come to all the more interesting I'd say.

Bill Fisher:

So let's take a look at something that has changed then. Let's start by looking at some reversals of trends. And Paul Briggs, I know you have something that you want to talk about on that front.

Paul Briggs:

Yeah, I think, and it was really noticeable in the US and Canada market. So the reports that we do are regional. The exceptions are country-level reports for Canada and the US. And the reason we do that is A, the demand for that US report is very high. So we like to break that out. But the other reason we do it is because there's quite a noticeable difference between what's happening in Canada and what's happening in the US when it comes to media habits. But what they do have in common is audio.

So if you look at the total amount of audio listenership, which includes radio, which includes music streaming, which includes podcasts, we saw that total time in both countries reverse from last year. So it grew from 2021 to 2022, but we saw a decline in the amount of daily minutes spent with those audio formats in 2023. So that was an interesting find that was a reversal of last year.

Bill Fisher:

Yeah, interesting. Is that trend evident in any other regions, do we know?

Jason Mander:

It's actually a fairly global trend. So in previous years, the story has largely been that time spent on traditional media is slowly decreasing, but it's more than counteracted by the increases that people are spending on what you might call newer digital forms of media.

This year, actually most of them are seeing a little bit of a dip. So broadcast TV is down in all seven regions. Social media, print press, radio, music streaming down in five or six regions. And even time spent on mobile is down in three of the seven regions. Now, these aren't fundamental drops. There's no need for panic or alarm bells, but it's interesting that the overall time people are spending on media has declined for the first time. We'd say one reason is probably the cost of living crisis, lots of subscriptions being canceled or squeezed, which naturally affects how much time people are spending on these. But also there's a little bit of post-COVID correction going on here. Some of those newer activities really boomed during

the lockdown, and naturally as the world has got back to what you might call normal, there's a little bit less time being spent on them.

So this year for the first time overall, people are just spending less time on the overall media portfolio.

Paul Verna:

And I know anecdotally a lot of people I speak with feel like they're just sort of overloaded with social media and are basically pulling back from, if not canceling accounts, definitely spending less time on platforms like Facebook and Instagram. So that could be playing into it at least on the social side. That wouldn't speak to smart, well, it could speak to smartphone use, but wouldn't necessarily speak to connected TV or linear TV. But I thought that was interesting.

Paul Briggs:

Jason, I was just going to pick up on a point you made earlier about podcasts and that audio format being down. I ran the numbers and in 2022, podcast time gained in every region, but in 2023, the most recent five of the seven regions saw declines in podcast time. So there's something going on with demand for podcasts, maybe it's reached a ceiling in terms of the amount of time people commit to it, but that was one particular data point that I thought was interesting. I guess part of it has to do with my own deep appetite for podcasts, and it's a bit of a head scratcher for me that time spent with the medium is actually declining in most regions.

Paul Verna:

Yeah, especially when you consider that in a lot of places commuting is coming back. And I've been at advertising week and the trains are full now and so many people are going back to the office. So you would think that would increase podcast listening time or time spent, but maybe not necessarily.

Jason Mander:

Yeah, it's interesting. I mean, the declines are mostly limited to a few minutes. So like I said, it's not fundamental, but overall there does seem to be some evidence for people actually doing what they said they were going to do. Every single year we've done this report, if you ask people, "Are you spending less time on social media?" They say, "Yes, of course, we are." But

then when you actually look at it, they're probably not. They might actually be spending more. But we're seeing a widespread behavior change. I think that people are actually genuinely just withdrawing a little bit, not a huge amount, just a little bit from some of those media activities.

Bill Fisher:

Yeah, I was wondering what's happening regionally in this regard. So looking at some of the data, we have this nice sort of graphical representation of time. Spent with media, with the different mediums across different regions, and we sort of have leaders and laggards. And one thing that I noticed was in Western Europe in a lot of the media categories, it's now lagging. I mean, it lagged in a few in the 2022 report, but it's lagging in more this year. So what's happening across the regions in terms of this leader and laggard behavior?

Jason Mander:

So yeah, there's two certainties when we look at this regionally. One is that North America will always be ahead for any type of television. Linear, online, you name it, people in North America love watching. Then it's that probably Western Europe will be identified as the laggards along to an extent with Central and Eastern Europe.

One reason for that is age profiles. We've got to remember when we're looking at North America and Europe, they are where we'll find the highest internet penetration. So the profiles of who we're looking at are the most similar to the general population. If you compare that to places in Latam, MEMA, parts of APAC, they're much younger online populations. So naturally, the younger you are, the more time you spend on certain activities and that will... Because Western Europe has a, relatively speaking, old population, they will appear as laggards.

That said, it's not the only thing. There are whole swathe of Europe, particularly in Northern Europe that have always been quite simply less keen on some of the newer, what you would call newer activities. So things like social, podcasts, gaming, streaming, they've never quite found the full foothold in places like Germany, Netherlands, Belgium, the Nordics as they have elsewhere. It's kind of similar to Japan in that respect. Those are countries that just haven't so wholeheartedly embraced those activities and that will be very much why some of them are coming up as laggards.

Paul Briggs:

Yeah, it's interesting to look at, if you look at the Asian regions, there are some distinctions there that I wanted to call out. So in greater Asia Pacific, if you look at penetration or use of voice assistance, so 36% of respondents in that region use the voice assistant to look up information or to complete a task. That's well ahead of any other region. A lot of that has to do with sort of the ease of input of text into a smartphone, for example. It's a little more difficult in certain languages. So I think we're seeing the voice assistance use be higher because of that.

And just another point, India, 40% of respondents in India used a voice assistant. So that's the number one country in the world for this type of technology. The other interesting fact from Asia, and this comes from Southeast Asia, is the rate of device ownership in this region is significantly lower than anywhere else in the world. And that has a lot to do with sort of the rural population in those countries, income divides, and the disparity between high-income and low-income ownership rates.

So those are a couple of facts from Asia that I thought would be sort of interesting to call out.

Bill Fisher:

Certainly are.

Paul Verna:

I was wondering on that point, Paul, with device ownership and rural populations, and Jason, maybe you can clarify this, the survey is only of internet users, correct? So I would think that that audience would almost negate the rural aspect because internet connectivity is going to track with device ownership. So I was just hoping to get your take on that, Jason. I don't know if I'm off on that observation.

Jason Mander:

Yeah. So in emerging markets, your internet populations, relatively speaking, will be more urban, more middle class than the total population, so that will play into it. On the voice front, I actually found that one of the most interesting things from this year's report. Because if you were to sit down before looking at the data and predict where you would see increases, I would certainly have thought the voice would be going up strongly. And actually it really isn't. It's up fractionally in a handful of countries like UAE and Brazil. Most of the rest of the world it's completely static, but actually it's down pretty heavily in a whole swathe of APAC

countries. So China, India, Malaysia, Thailand, Philippines, South Korea, down noticeably like five to 10 points. I was not expecting that. And it does suggest there's something in the usability that isn't yet flying in that region. Maybe it's to do with the number of languages there and the power of the recognition. But it's faltering in large parts of APAC in a way I wouldn't have expected it to.

Bill Fisher:

Okay. Lots of interesting stuff there on reversals and trends, but let's look at a few milestones that we may have passed in this year's report. Who's got some milestones for me? Who wants to start?

Paul Briggs:

Yeah, I can jump in here, Bill. I think one milestone is related to smart TVs. And smart TV ownership has a wide impact on all sorts of behaviors, especially online streaming of long-form content on your TV. A smart TV connected to the internet is going to make accessing streaming much more easy. So I think that'll impact a variety of behaviors in the survey.

But smart TVs are over 60% in the US for the first time. Three of the regions have greater than 60% penetration of smart TV ownership. So that particular stat, and all seven regions, smart TV ownership grew this year. So I think that particular device is having a wide-ranging impact on a lot of these behaviors.

Bill Fisher:

That's a good start. Any other milestones?

Paul Verna:

Not necessarily a milestone, but I think smart home products in general have been doing very well, trending upward, and particularly in North America, 26-plus percent adoption. And we've seen this in individual regions and individual countries where, I mean, the UK actually performs very strongly in that regard.

So on the one hand, I think some of the devices that we were talking about a lot last year in regard to say the metaverse, like virtual reality headsets, those have not done as well, but smart home, smart watches, those are actually doing very well. So that may be a little different from what I would've expected this time last year when there was so much talk about the

metaverse. And that has sort of faded, particularly as generative AI has taken up a lot more of the oxygen, at least in the media as far as the shiny new object.

Jason Mander:

Yeah, actually, I would continue on the smart theme. Smartwatches were the things that I picked out. We're now agonizingly close to the 25% ownership boundary for smartwatches, already passed that in countries like USA and UK now. If you look at the year-on-year growth of smartwatches, it's really pretty impressive. Between 2019 to 2023, it's gone from, for example, 13% to 30% in the US, 7 to 23% in Brazil. So lots of really nice growth there.

And I know we're not on surprising stats yet, but it surprised me that Czech Republic or Czechia was the most likely country where people were to have a smartwatch. I would not have predicted that.

Bill Fisher:

So we've talked about the shiny new things. What about the old-fashioned stuff, the PCs and laptops, because there's been a milestone here, hasn't there?

Paul Briggs:

Yeah. And the US for the first time in 2023, time spent with mobile devices exceeded that of PCs, laptops, and tablets. So that milestone has occurred in lots of other countries prior to the US. But this is the first year that we're seeing that in the US and I think that that gap, it's only like a minute right now. So it's basically on par, but mobile is a minute more. That'll continue to increase in the years ahead for sure.

Paul Verna:

I think that was driven entirely by my daughter doing her homework on her phone, which I cannot for the life of me fathom writing essays, doing spreadsheets. And she has a laptop, so I don't get it. But it's a generational thing I guess.

Paul Briggs:

That is impressive. Write an essay on a smartphone. That is something to think about.

Paul Verna:

Impressive is putting it generously, Paul. I think it's bizarre and freakish, but yeah, I get it.

Bill Fisher:

Okay. Talking about impressive things. It's time for you guys to try and impress me because we're not having our regular recap stats quiz to end the episode this month. But in its place we have something equally exciting and equally competitive. It's something I'm calling the Surprising Stat Award.

I've asked each of my guests to sift through the swathes of data in the GMI and select a statistic or data point that they think will surprise or shock me the most. And I've had far too much time on my hands today and I have created my very own shockometer. Unfortunately, listeners aren't going to be able to see this, but if you look at LinkedIn, I'll be posting a picture. It's a shockometer. So it's a sliding scale of how shocked I am by the stat that I'm given. It starts at the bottom with boring, it goes up through meh, now you're talking no way, seriously, right to the top, which see if you can shock my socks off.

So I'm going to position you guys somewhere along this sliding scale based on the stat or data point that you give me. So who's going to be brave and go first? Who's got a surprising stat for me?

Paul Verna:

That's a lot of pressure, Bill. But I'll step into the breach. I always lose these games anyway, so I have nothing to lose. So I wrote the Latam and Western Europe portions of this report, but the stat that surprised me most was from China and it was watching TV. Less than 60% of Chinese internet users in the survey watch TV. That was by far the lowest in the world. And I was thinking, "Okay, so maybe they're making up for it through, I don't know, digital." But they were also lowest in the region in streaming sticks and watching TV in any form. Second lowest in live TV and kind of in the middle of the pack in smart TVs. So I was astonished by that.

I know that that is not a new statistic, that those numbers actually went up a bit from last year, but maybe because I'm focusing on it for the first time, I thought one of the largest economies and populations in the world has a very, very low rate of TV and in some ways digital TV usage.

Bill Fisher:

That is interesting. I'll let you know how shocked I am in the moment. Who's next?

Paul Briggs:

I've got one for you. It's from the same part of the world that Paul just mentioned, although I'll go a little broader, including China, but greater Asia-Pac. So the number that we're all aware of because we've seen the chart, is that the region leads in time spent with print press at 58 minutes a day. That's well ahead of the worldwide average. But the surprising stat here is a little homework. I did a little homework on why that might be the case. And it turns out that five of the top 10 daily circulation newspapers reside in Asia-Pacific. So two in Japan, two in India, one in China.

And if you look at the percentage of digital access versus reading the actual paper, it's pretty high in that region as well. So I thought that was interesting. There's a lot of newsprint on fingers in that region I suppose. By the way, the other five, if you want to know, three are in the US. You can probably guess which ones those are. And two from the UK.

Bill Fisher:

I like that you did some homework, Paul. That shocked me maybe more than the stat. Well done. That's excellent. Okay, Jason, over to you. Can you trump these guys?

Jason Mander:

No pressure. So yeah, I was going to go Czech Republic, but I've thrown that one away already. Then I was going to go with tablets because I thought it was surprising that Austrians were the most likely to have one. But then I thought that wasn't surprising enough. So in the end I picked one that shows why it's so important to understand the differences even within a region. So if you go to Japan, only 0.4% of people are using 11 or more social networks. Go across the region to India, and that jumps to 17%. So 17% of Indians are on at least 11 different social networks and messaging apps, which blows my mind. I can barely keep up with three or four let alone using that many.

Bill Fisher:

Wow, that was close to shocking my socks off. Let me just quickly jot down your positions. So if I refer back to my shockometer, this maybe not showing particularly well, but Paul Verna, Paul Briggs, both incredibly interesting stats. Paul Briggs, you just trumped Paul Verna just because you did your homework. So well done for that. But I'm going to be a good host and I'm going to give the trophy to Jason. Well done. You almost shocked my socks off. You are the surprising stat award winner, the first and probably last time that we'll have this award. And I don't have an award for you. You can have a copy of the shockometer if you want, but

that's it from us to be honest. We don't have budget for anything else. So well done, Jason. As always, we like to end this show with a winner and that winner is Jason. Thanks for speaking with us today.

Jason Mander:

I'm going to bathe in my glory for the next week.

Bill Fisher:

Paul Briggs, good to have you on the show again.

Paul Briggs:

Yeah, it was fun. Thanks, Bill.

Bill Fisher:

And Paul Verna, great to have you on Around the World for the first time.

Paul Verna:

Thanks, Bill. I hope to be on again sometime.

Bill Fisher:

I'm sure we'll get you back. And thanks to all of you for listening in today to Around the World, an eMarketer podcast made possible by Intuit Mailchimp. Tune in tomorrow for our Behind the Numbers Daily Show hosted by Marcus. If you want to ask us any questions at all, you can of course email us at podcast@emarketer.com. I hope to see all of you next month for another edition of Behind the Numbers Around the World. I can guarantee you will be warmly greeted. Bye for now.