

UNITED STATES

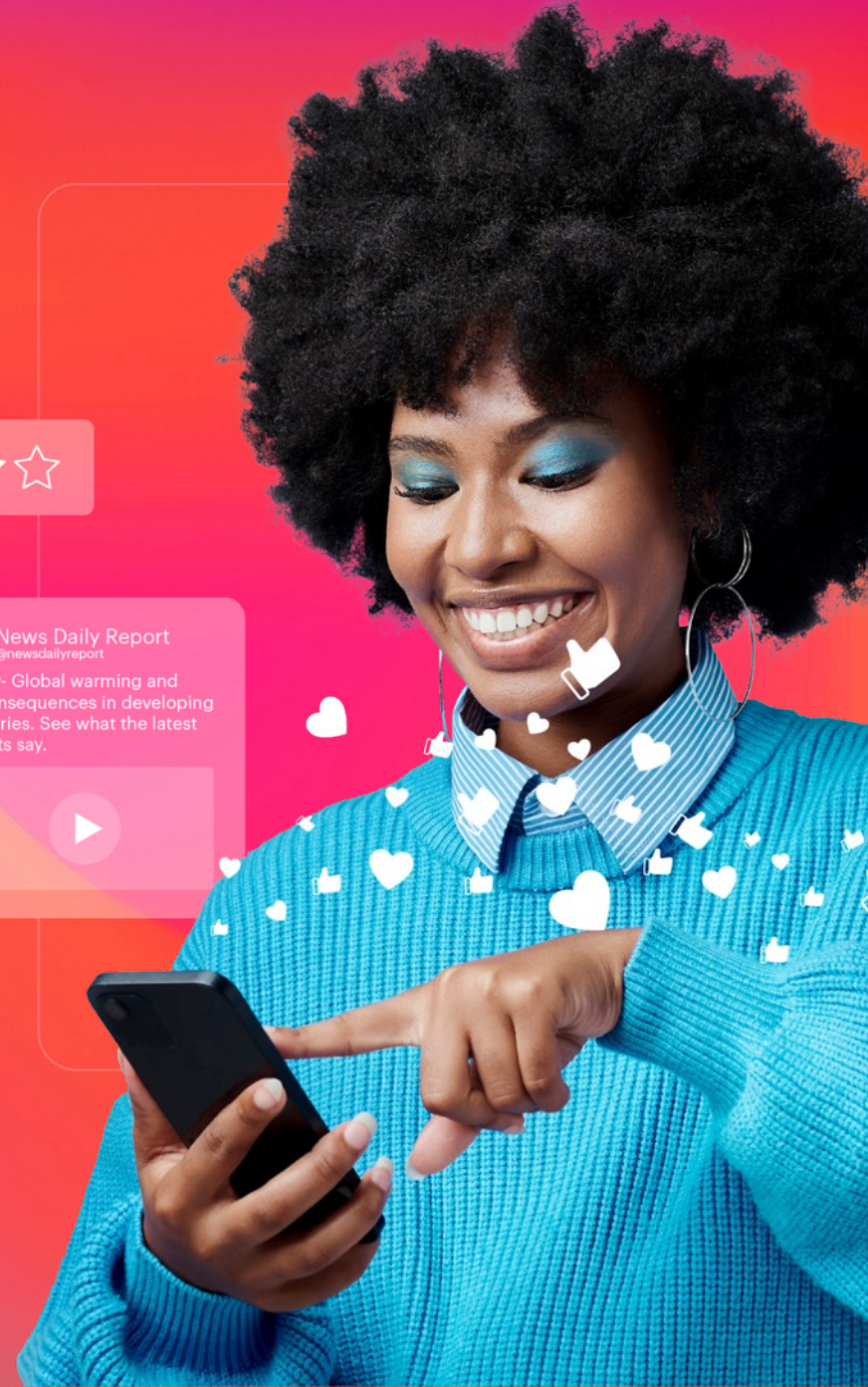


# The 2024 Media Morph

Understanding the evolving US media landscape



News Daily Report  
@newsdailyreport  
Today- Global warming and its consequences in developing countries. See what the latest reports say.

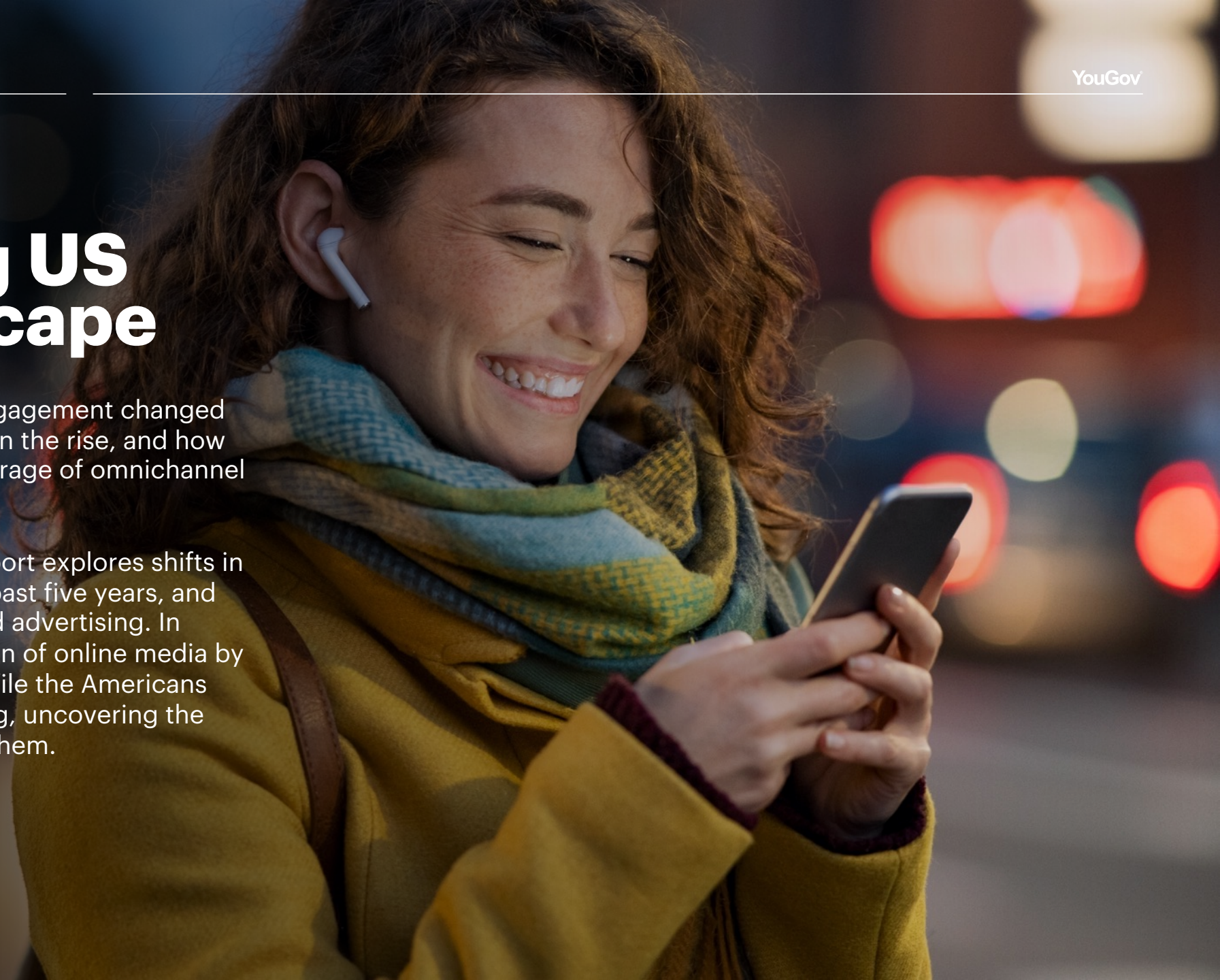


# The evolving US media landscape

How has media consumption and engagement changed in recent years, which channels are on the rise, and how are consumers responding to the barrage of omnichannel advertising?

Leveraging **YouGov Profiles**, this report explores shifts in media habits of Americans over the past five years, and drills down into their attitudes toward advertising. In particular, we chart the rapid adoption of online media by older Americans since 2019, and profile the Americans who are most receptive to advertising, uncovering the media channels most resonant with them.

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# Online fully entrenched

Online is now the primary advertising channel, dominating the attention US consumers

## Main advertising channel that grabs your attention

■ 2019 ■ 2023

Online (apps, social networks, websites, etc.)



TV



Direct mail (flyers, letters, coupon envelopes, etc.)



In-store promotions



Podcasts



Movie theater



Billboards



Radio



Printed magazines



Printed newspapers



Datasets used: YouGov Profiles+ USA 2023-12-31, YouGov Profiles+ USA 2019-12-29; N> 2,500; Don't Know and Not Applicable responses omitted.

# Streaming fueling online attention

Social media remains the top channel, but online video and streaming/on-demand TV are registering highest growth

## Main online advertising medium that grabs your attention

■ 2019 ■ 2023

Social networks (side banner ads, brands promotional content, etc.)



Online videos (pre-roll video ads, banner ads on the platform, etc.)



Streaming/on demand TV services



Websites (banner ads, videos, etc.)



Music streaming services (audio, banner ads, etc.)



Apps (videos, banner ads, etc.)




























# Generational social shift







Even among 45+ Americans, social media is now close to eclipsing TV as the top media channel

Explore more data >

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YouGov Profiles+ USA 2023-12-31, N> 15,000

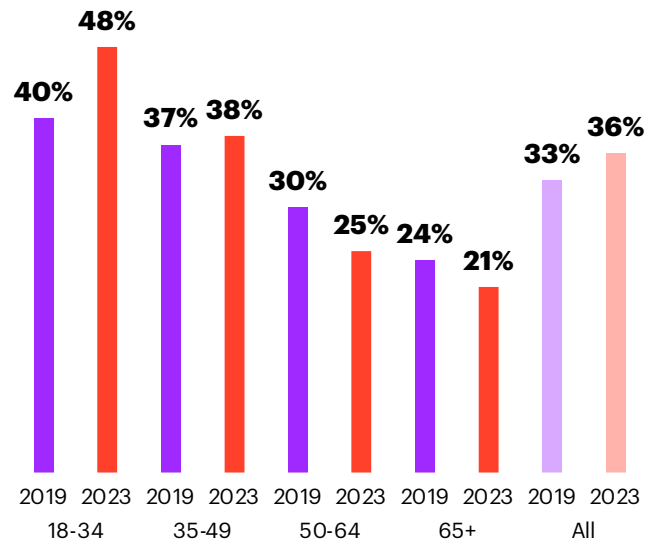
Rank	18-24	25-34	35-44	45-54	55+
1	 57%	 60%	 66%	 75%	 83%
2	 49%	 56%	 64%	 70%	 69%
3	 42%	 45%	 49%	 52%	 58%
4	 39%	 44%	 48%	 50%	 41%
5	 26%	 38%	 43%	 45%	 28%

 Visited social media sites  
  Watched TV  
  Listened to a music streaming services  
  Listened to radio  
 Watched online streaming services  
  Read an online newspaper

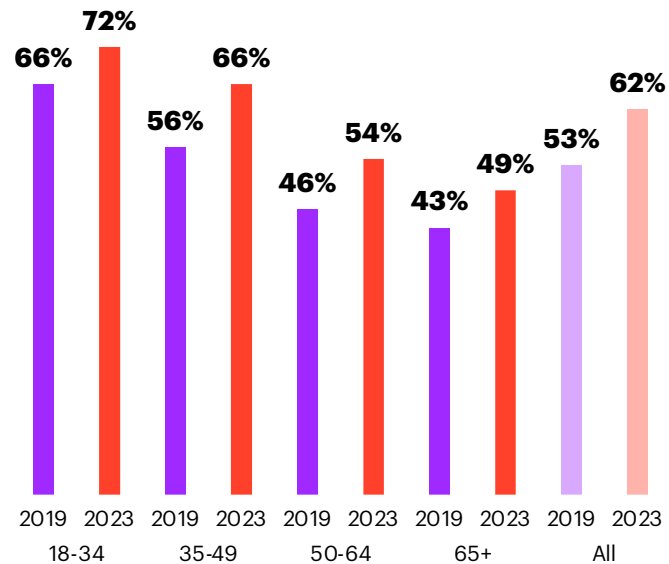
# Social isn't just networking

Across generations, Americans are turning to social for news and entertainment

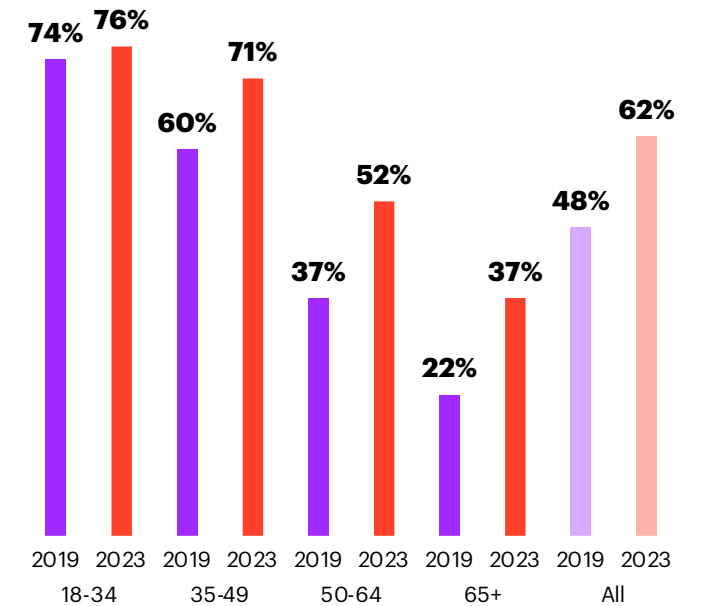
## Agree "I enjoy playing games on social media"



## Agree "I mainly use social media for the entertainment and news content"



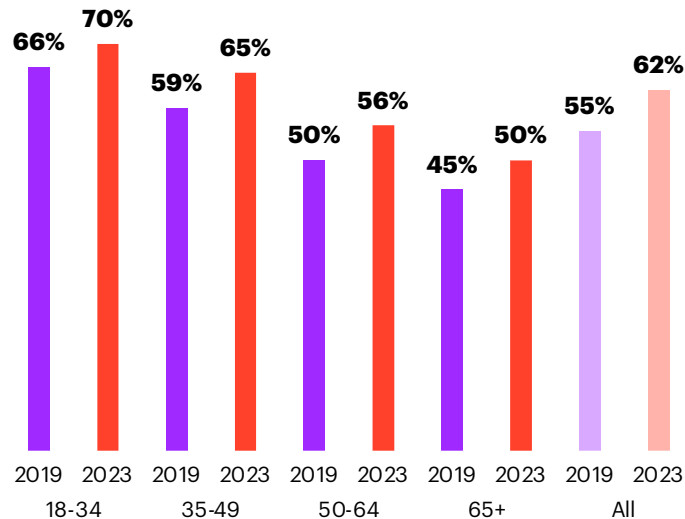
## Agree "I primarily listen to music through streaming services"



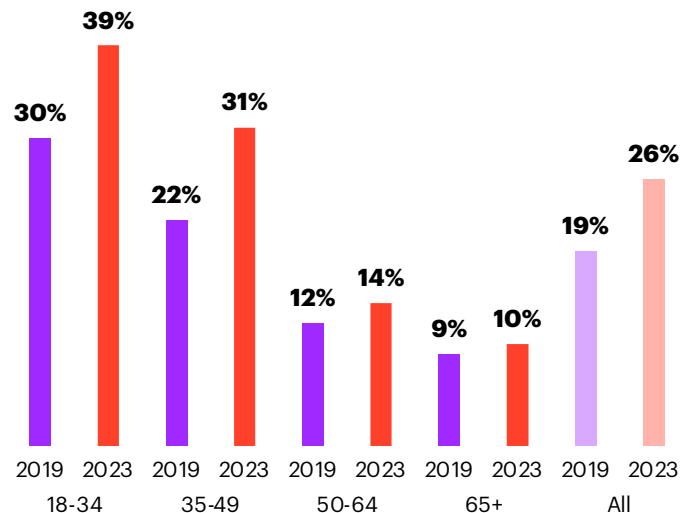
# Digital news consumption maturing

Older Americans are shifting news consumption to digital, and paid digital subscriptions are rising

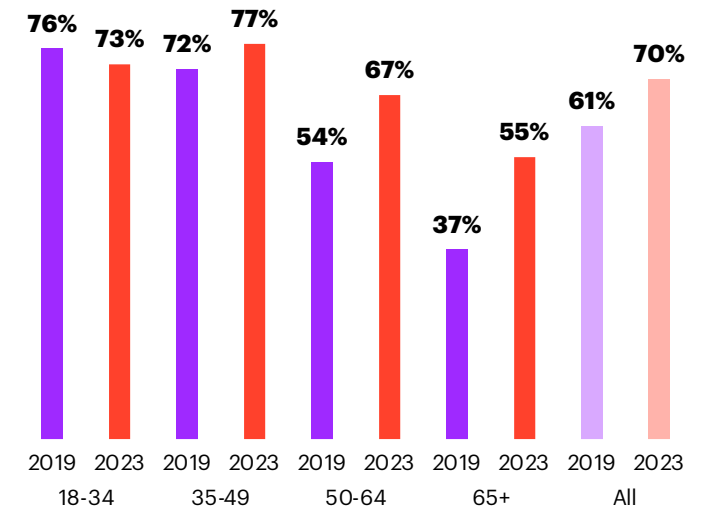
## Agree "I prefer to read news content online than in printed newspapers"



## Agree "I would pay for access to magazine content online"



## Agree "Streaming services have changed TV watching for me"

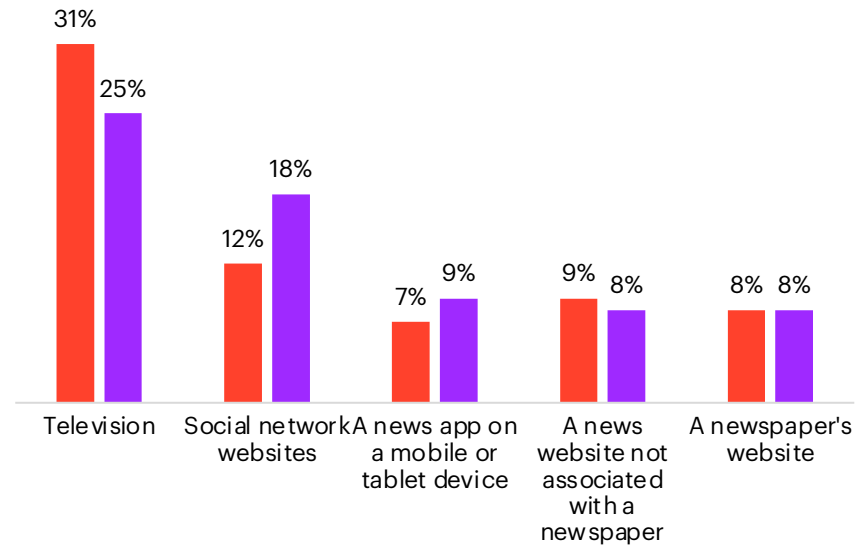


# TV slides as primary news source

Social continues to rise as a primary news source while TV loses long-standing dominance

## Main/Primary Source of News

■ 2019 ■ 2023






























# News sources by generation







Social is the top news source for those aged 18-34, while over 45s still tuned in to TV

Explore more data >

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YouGov Profiles+ USA 2023-12-31; N> 177,000

Rank	18-24	25-34	35-44	45-54	55+
1	 44%	 48%	 45%	 56%	 73%
2	 39%	 39%	 45%	 41%	 36%
3	 31%	 33%	 35%	 33%	 35%
4	 27%	 29%	 32%	 33%	 34%
5	 21%	 24%	 29%	 33%	 33%

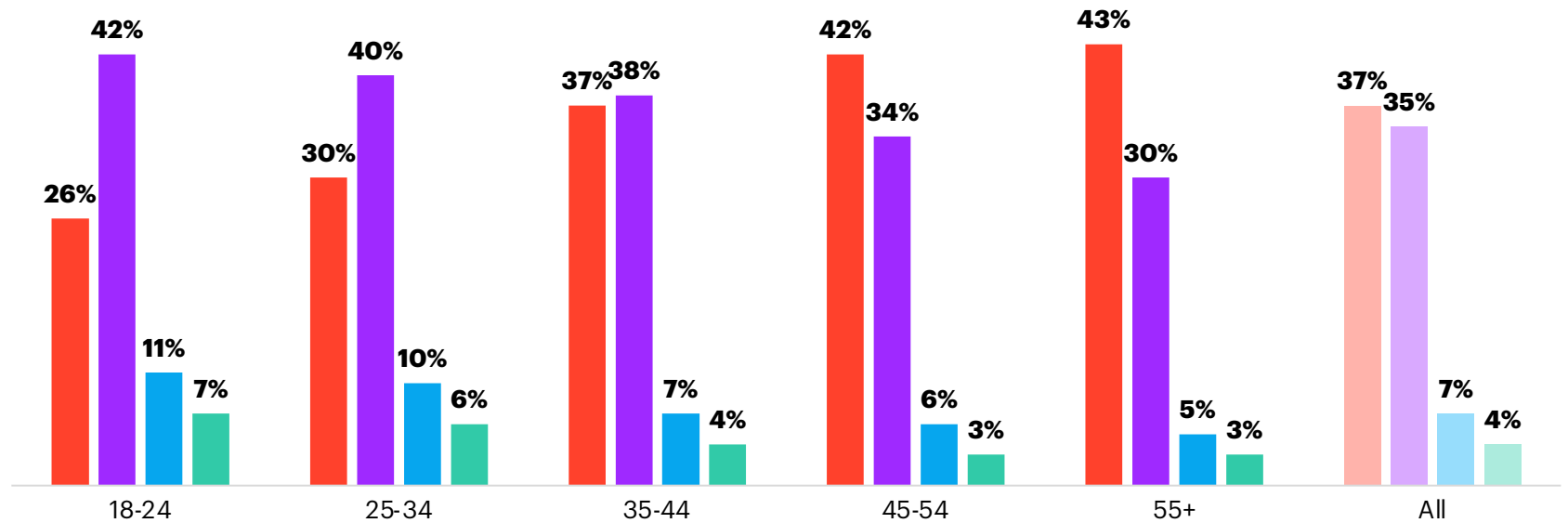
 Social network websites  
  Television  
  A news app on a mobile or tablet device  
  Listened to radio  
 A news website not associated with a newspaper  
  A newspaper's website

# Almost everyone, always connected

60% of 18- to 24-year-olds  
spend more than 6 hours a  
week on social media

## Time spent on social media

■ Less than 5 hours per week ■ 6-20 hours per week ■ 21-35 hours per week ■ More than 35 hours per week



# Entertainment over social connection?

Facebook continues to be the most used social network, but video-centric platforms like YouTube and TikTok register biggest growth

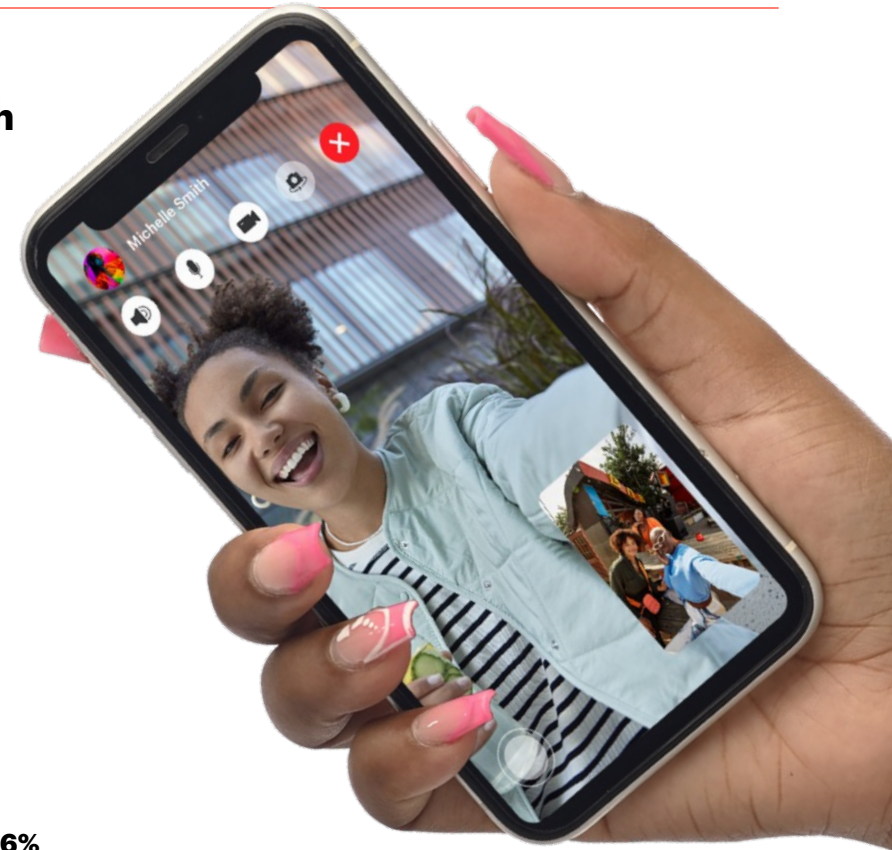
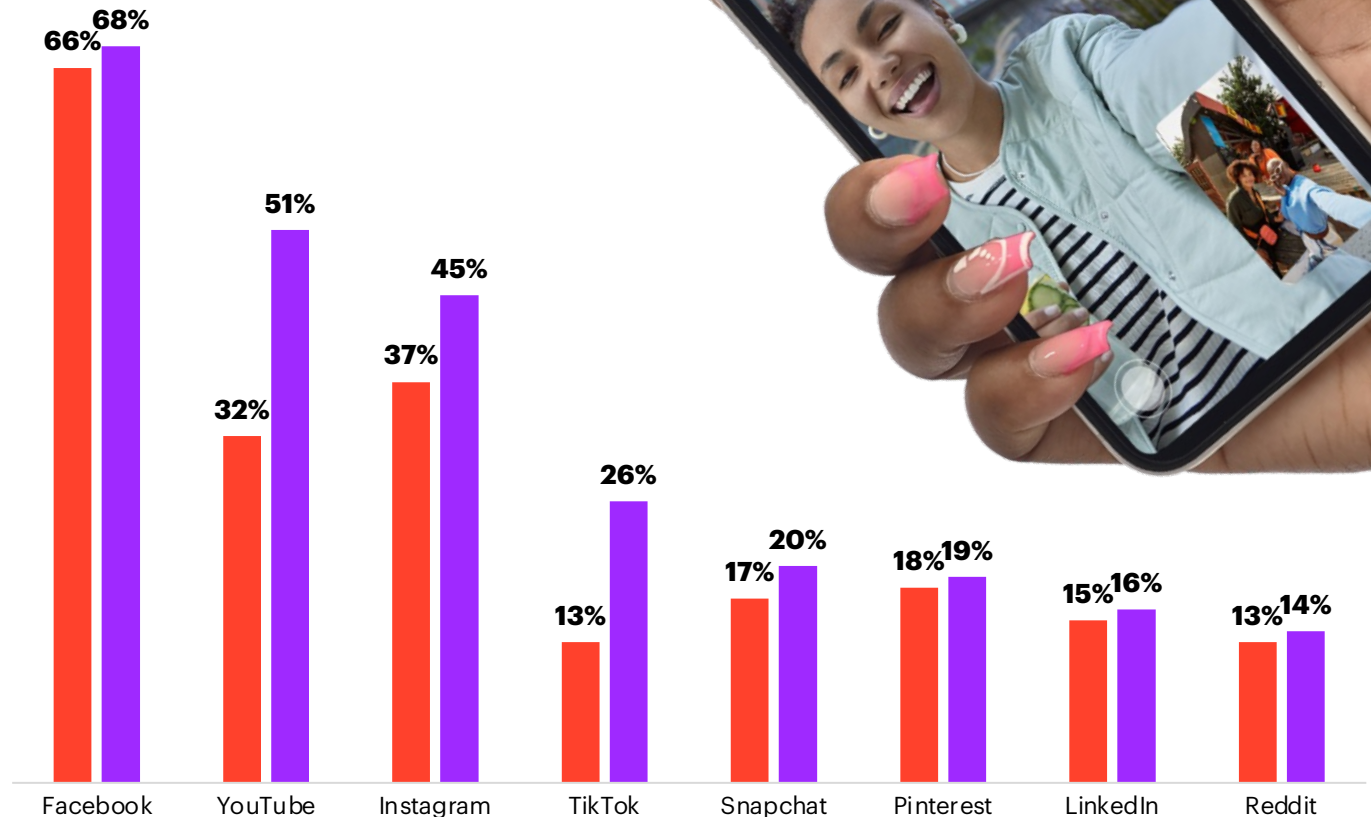
[Download Redditors Report >](#)

[Download TikTokers Report >](#)

Datasets used: YouGov Profiles+ USA 2023-12-31, YouGov Profiles+ USA 2021-12-26; N> 91,000

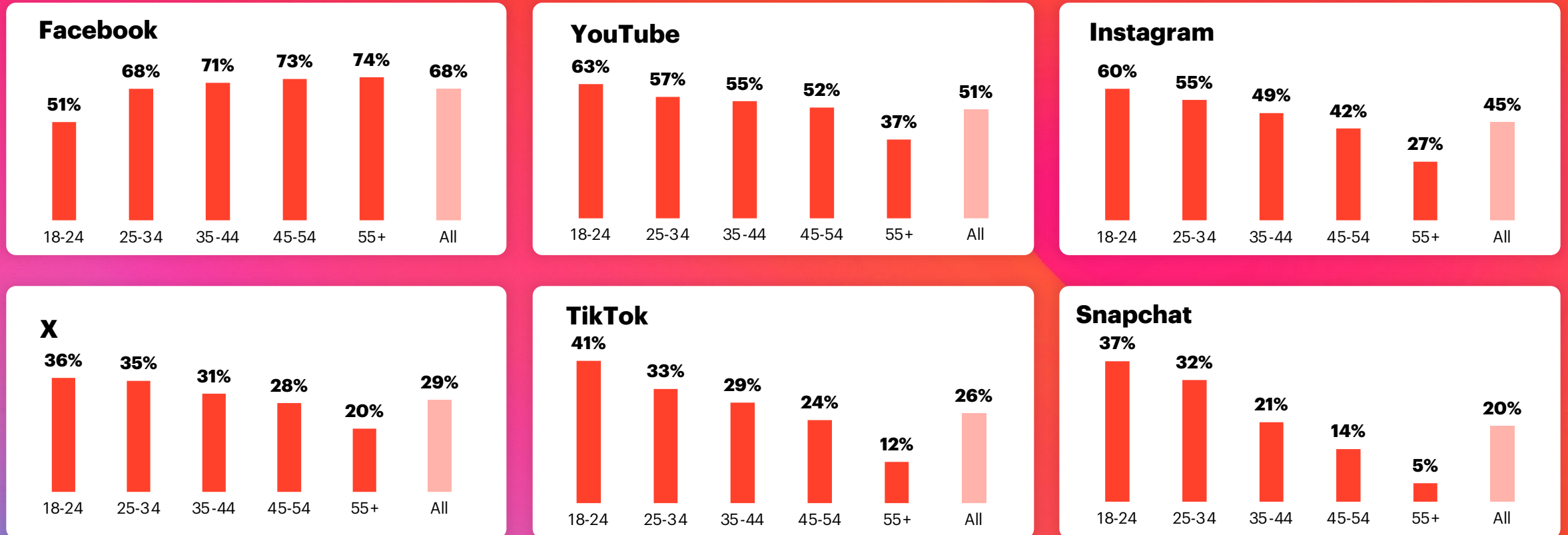
## Social networks - used last month

■ 2021 ■ 2023



# Social platforms by generation

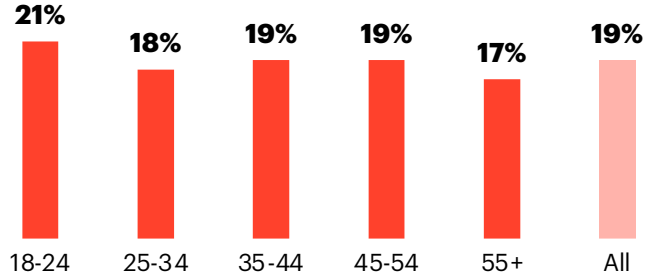
While Facebook remains strong across all ages, younger people are using more social networks, especially TikTok and Instagram



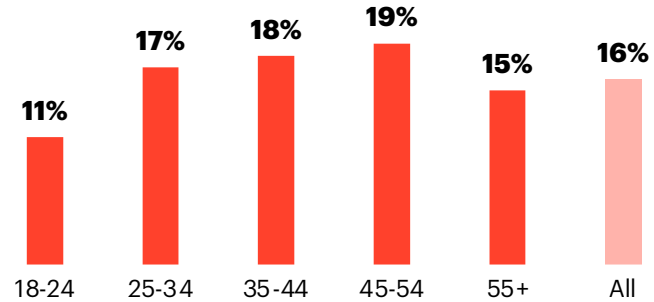
# Social platforms by generation

Pinterest shows the most even appeal across generations

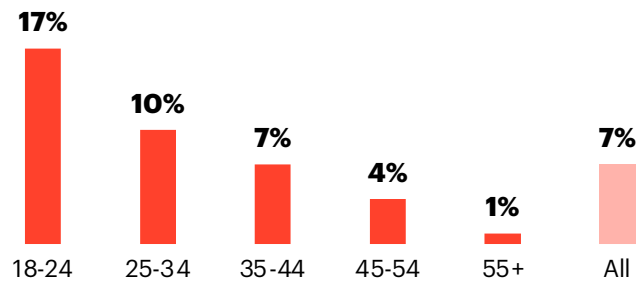
## Pinterest



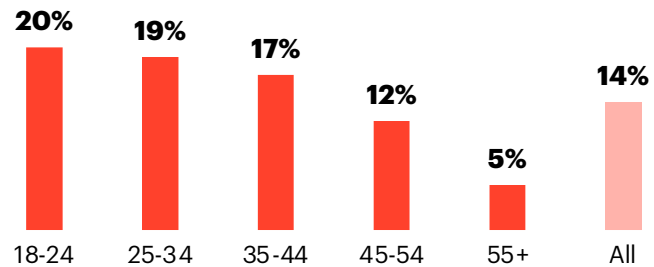
## LinkedIn



## Discord



## Reddit



# The rise of messaging

WhatsApp registers the fastest growth in crowded market, while Skype loses ground

[Explore more data >](#)

[Run a survey >](#)

Datasets used: YouGov Profiles+ USA 2023-12-31, YouGov Profiles+ USA 2021-12-26; N> 41,000

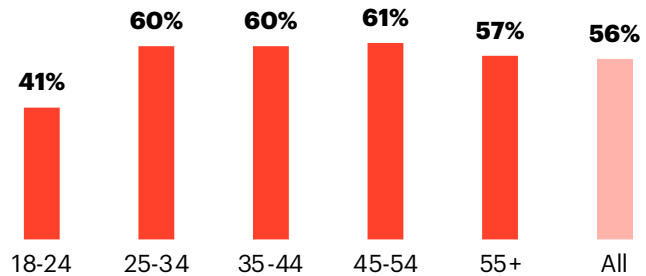
## Messaging apps used



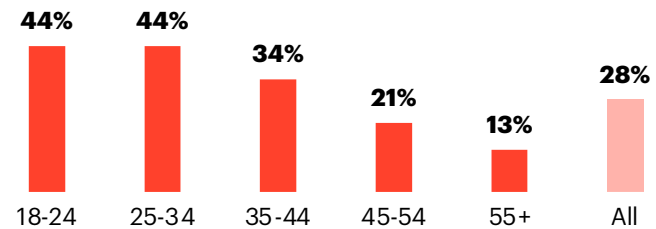
# Messaging apps by generation

Younger Americans using a broader repertoire of messaging apps

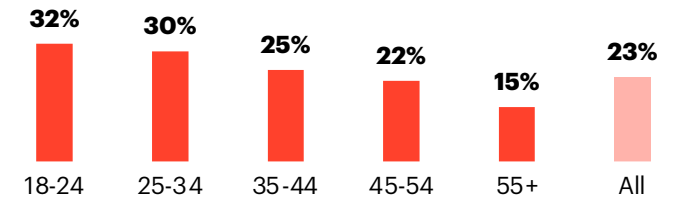
## Facebook Messenger



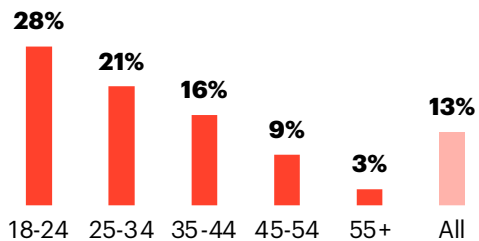
## Whatsapp



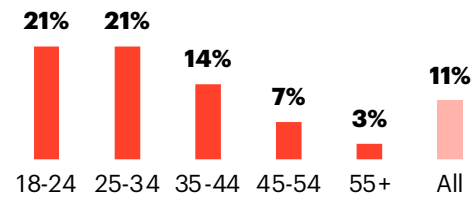
## iMessage



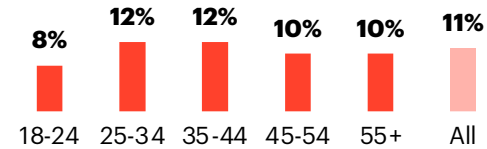
## Discord



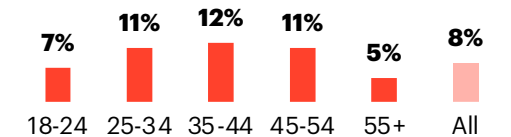
## Telegram



## Messages by Google



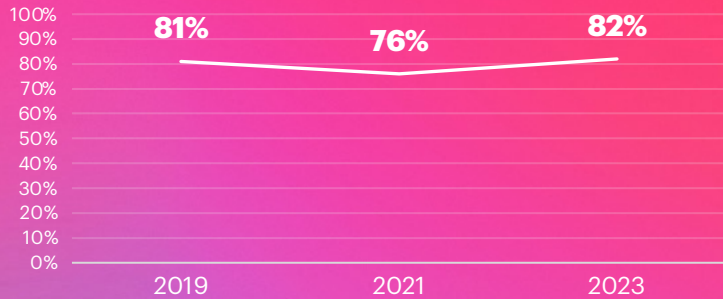
## Microsoft Teams



# Live TV ratings hold steady

Live TV viewership is holding steady, with 55+ Americans now watching the most

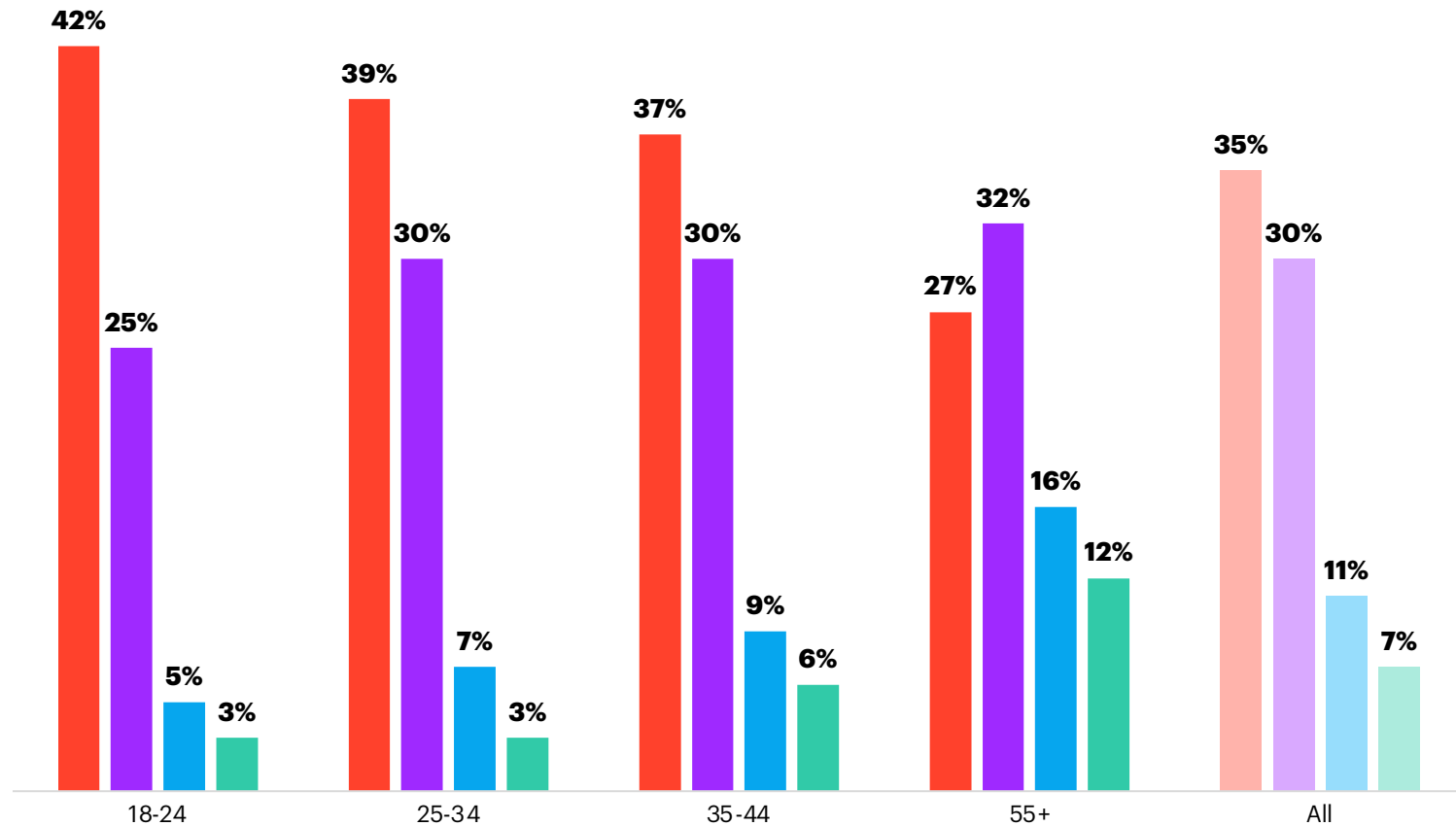
## Weekly Live TV viewers



Datasets used: YouGov Profiles+ USA 2023-12-31, YouGov Profiles+ USA 2021-12-26, YouGov Profiles+ USA 2019-12-29; N> 14,000;  
TV hours watched per week live- included all options except don't know and not applicable

## TV hours watched per week - live

■ Less than 5 hour per week ■ 6-20 hours per week ■ 21-35 hours per week ■ More than 35 hours per week



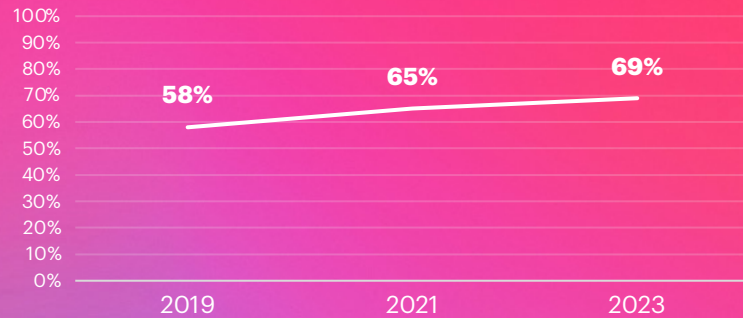
YouGov Profiles+ USA Datasets used: (Profiles+ USA 2023-12-31); N> 73274



# A rising stream raises all boats

YouTube, Disney+ and Peacock see biggest lift in streaming audience

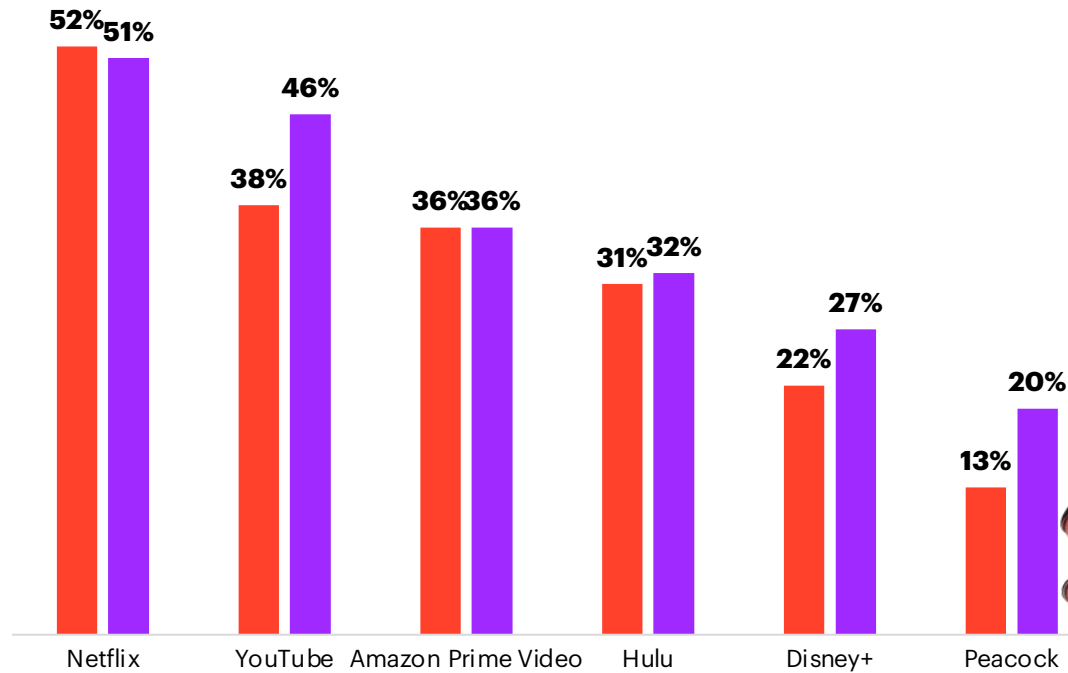
## Streamed video - last week



Datasets used: YouGov Profiles+ USA 2023-12-31, YouGov Profiles+ USA 2021-12-26, YouGov Profiles+ USA 2019-12-29; N> 15,000; Time spent watching streamed video inside my home- included all options except don't know and not applicable

## TV - streaming services regularly used

■ 2021 ■ 2023



YouGov Profiles+ USA Datasets used: (Profiles+ USA 2023-12-31); N> 86565

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# Ad-Accepting vs. Ad-Adverse

A woman with curly hair is sitting on a light blue couch, holding a black remote control and laughing. She is wearing a white t-shirt and light blue shorts. To her right, another person is partially visible, also laughing. The background shows a lamp and a wall with an electrical outlet.

# How do attitudes to ads vary by age?

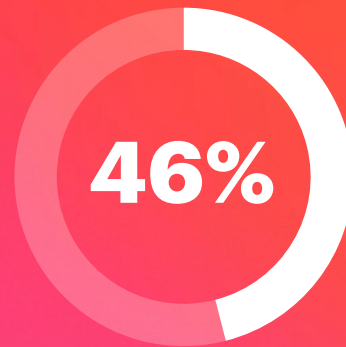
While social ads are driving engagement, skepticism towards advertising is on the rise

Statements agreed with Advertising	2019					2023				
	18-34	35-49	50-64	65+	All	18-34	35-49	50-64	65+	All
"I'm more likely to engage with advertisement on social media than on regular websites"	51%	37%	22%	13%	30%	59%	45%	24%	14%	40%
"Advertising helps me choose what I buy"	55%	50%	46%	44%	49%	59%	48%	33%	30%	46%
"I think ads are a waste of time"	56%	49%	42%	43%	48%	60%	55%	46%	45%	53%
"I don't trust the advertisements on TV"	52%	46%	46%	54%	49%	54%	51%	48%	54%	52%

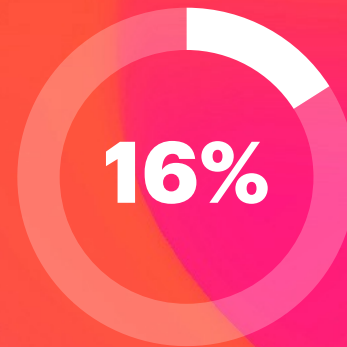
# Diverging views on advertising



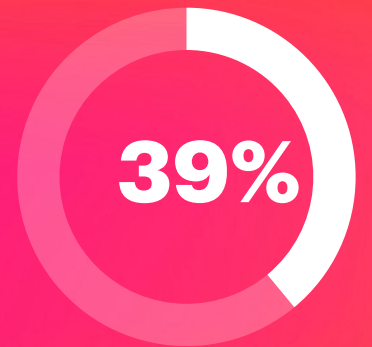
“Advertising helps me choose what to buy”



Agree



Neither agree nor disagree



Disagree

# Younger generations more ad-accepting

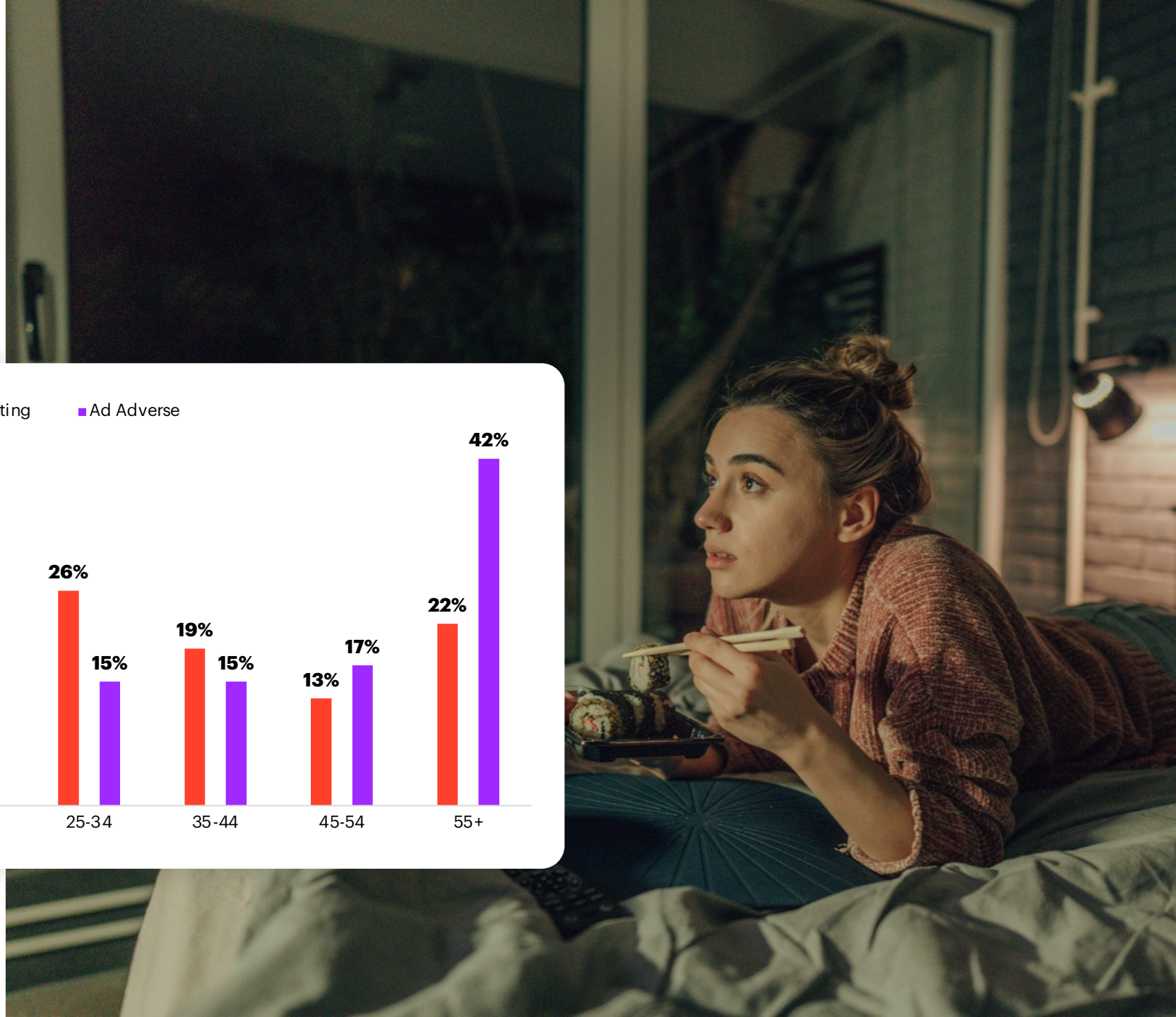
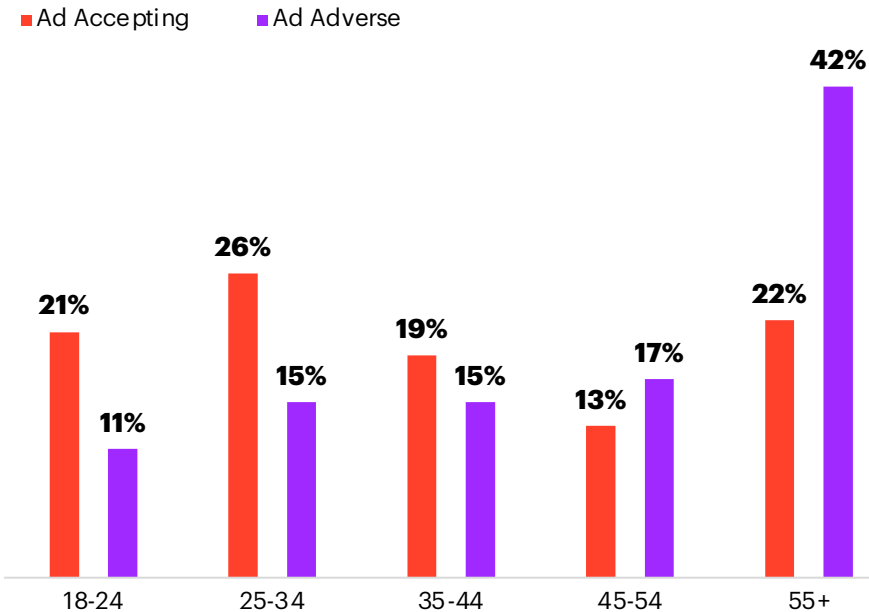
Older Americans are more ad-adverse, with over 55s nearly twice as likely to see little value in ads

[Explore more data >](#)

[Get in touch >](#)

YouGov Profiles+ USA 2023-12-31; N> 59,000

Ad-Accepting: Agree "Advertising helps me choose what I buy"  
Ad-Adverse: Disagree "Advertising helps me choose what I buy"

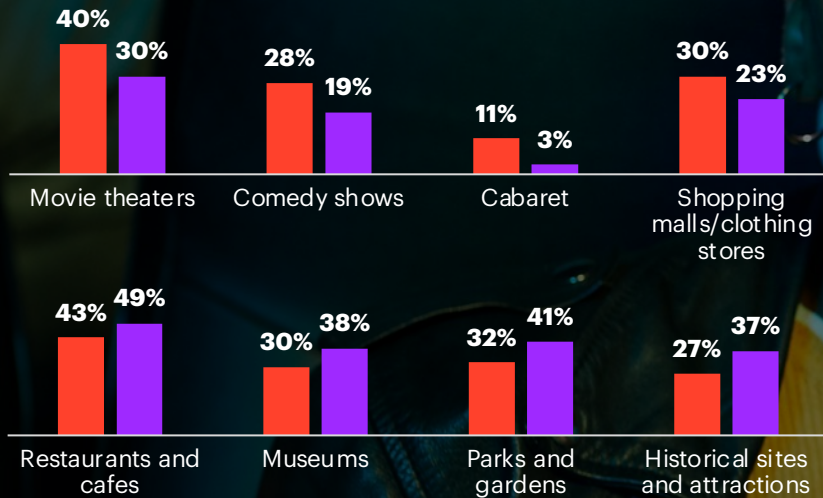


# How do ad-accepting Americans spend their free time?

Ad-accepting Americans are looking to be entertained while ad-adverse consumers prefer cultural activities

## Free time activities

■ Ad-Accepting ■ Ad-Adverse



YouGov Profiles+ USA 2023-12-31; N> 22,000

Ad-Accepting: Agree "Advertising helps me choose what I buy"  
 Ad-Adverse: Disagree "Advertising helps me choose what I buy"

# Which channels grab the attention of ad accepting?

Almost all advertising channels score more highly, with online and TV at the top

[Explore more data >](#)

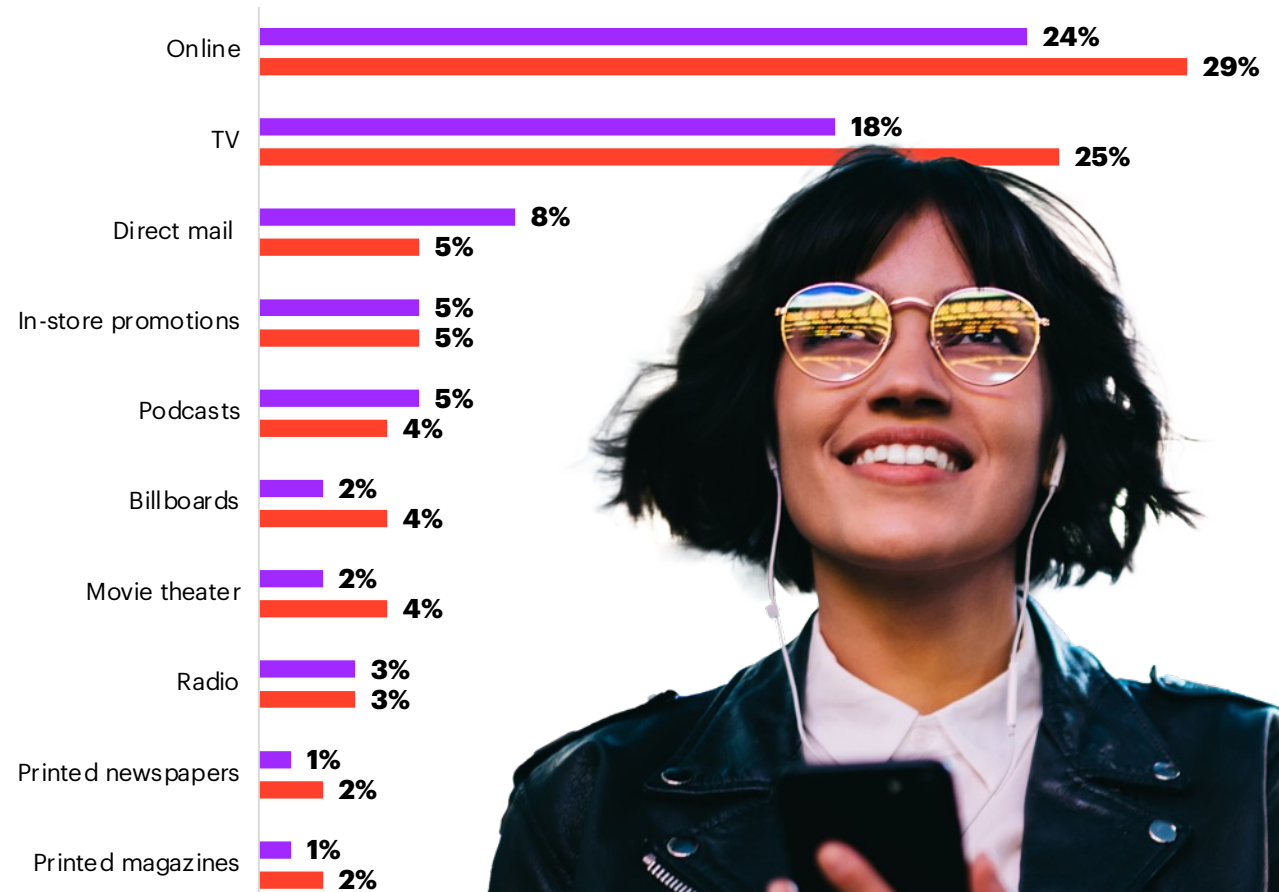
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YouGov Profiles+ USA 2023-12-31; N> 4,500

Ad-Accepting: Agree "Advertising helps me choose what I buy"  
Ad-Adverse: Disagree "Advertising helps me choose what I buy"

## Main advertising channel that grabs attention

■ Ad-Adverse ■ Ad-Accepting



# What do Ad-Accepting Americans look for in ads?

Ads featuring real people, relevant and moral messages can help form a deeper connection with ad-accepting Americans

## Statements agreed

I like seeing real looking people in advertisements



I often notice the advertisements on the internet



If a brand I like expresses a view I agree with in advertisements, I'm more likely to buy from that brand



I love recommending things for people to try



I like when companies have a moral message



Sponsorship can help keep companies socially relevant





# Want a deeper analysis?

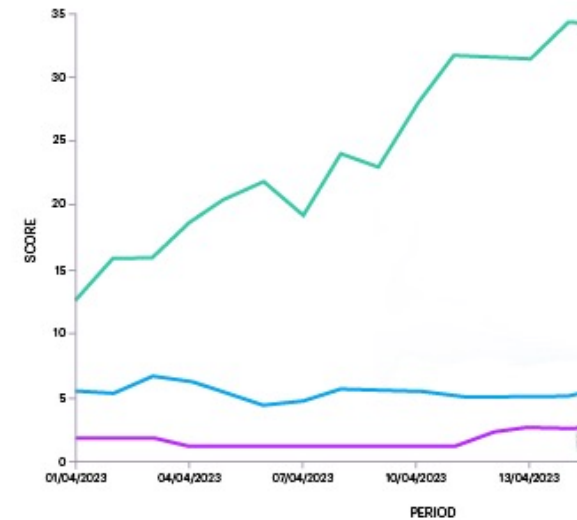
With YouGov Profiles, you can dig deeper into the media consumption habits and attitudes of virtually any target audience including:

- Customers of a particular brand
- Category considerers
- Affinity audiences

For trending insights, run a YouGov survey to get quick answers to inform your media strategy:

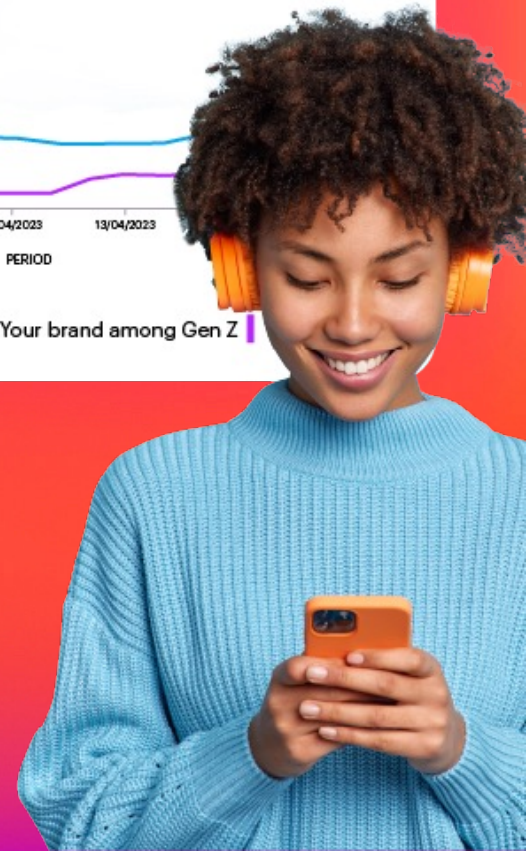
- Self-serve and Serviced surveys
- Granular audience targeting
- Results from 1 hour

## Advertising awareness



Metrics ▾

Advertising Awareness



# Thank you

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[Run a survey >](#)

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