globalwebindex

GWI Device

GlobalWebIndex's quarterly report on device ownership and usage.

SUMMARY

FLAGSHIP REPORT Q3 2017
www.globalwebindex.net

Introduction

GWI Device places the spotlight on the latest ownership and usage trends across all major device categories, including smartphones, PCs/laptops, tablets, smartwatches and smart TVs. Among others, this report covers the following topics in detail:

- Which devices are the most widely owned and used.
- Who is most likely to own a mobile, PC, tablet, smart TV and smartwatch.
- How much time is being spent on mobiles and PCs/laptops and how this varies by age and region.
- Which devices consumers consider to be their most important access point, and the behaviors that are most likely to be taking place on mobile or PC/laptop.
- Which brands are winning in the smartphone marketplace and how many are likely to be in the market for a new phone in the next six months.
- The prevalence of ad-blocking across mobiles and computers and the numbers deploying VPNs as they get online.

Content

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 POPULATION** OF EACH MARKET, NOT ITS TOTAL POPULATION.

OUR RESEARCH

Each year, GWI interviews over 350,000 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.**

INTERNET PENETRATION RATES ACROSS GWI'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.

ITU INTERNET PENETRATION METRIC 2016

Argentina	70.2	Hong Kong	87.3	Netherlands	90.4	South Korea	92.7
Australia	86.5	Kenya	26.0	New Zealand	88.5	Spain	80.6
Belgium	86.5	India	29.5	Nigeria	25.7	Sweden	91.5
Brazil	59.7	Indonesia	25.4	Philippines	55.5	Taiwan	79.7
Canada	89.8	Ireland	82.2	Poland	73.3	Thailand	47.5
China	53.2	Italy	61.3	Portugal	70.4	Turkey	58.3
Egypt	39.2	Japan	92.0	Russia	76.4	UAE	90.6
France	85.6	Malaysia	78.8	Saudi Arabia	73.8	United Kingdom	94.8
Germany	89.6	Mexico	59.5	Singapore	81.0	United States	76.2
Ghana	34.7	Morocco	58.3	South Africa	54.0	Vietnam	46.5

This table provides the latest estimates on internet penetration (defined as the number of internet users per 100 people) from the International Telecommunication Union. Please note that this will reflect internet penetration among the total population, and that the figure among 16-64s is likely to be higher.

SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q2 2017 wave of research with a global sample size of 89,029 (with 72,529 surveys completed on PC/laptop/tablet and 16,500 surveys completed on mobile). The sample by market breaks down as follows:

Argentina	1,510	Hong Kong	1,257	Netherlands	1,258	South Korea	1,265
Australia	1,262	India	3,041	New Zealand	1,274	Spain	2,268
Belgium	1,274	Indonesia	1,785	Nigeria	750	Sweden	1,255
Brazil	2,281	Ireland	1,271	Philippines	1,532	Taiwan	1,255
Canada	2,295	Italy	2,284	Poland	1,266	Thailand	1,520
China	8,053	Japan	1,754	Portugal	1,321	Turkey	1,512
Egypt	1,299	Kenya	750	Russia	2,273	UAE	1,250
France	2,276	Malaysia	1,537	Saudi Arabia	1,266	UK	7,850
Germany	2,336	Mexico	1,555	Singapore	1,521	USA	15,946
Ghana	750	Morocco	750	South Africa	1,528	Vietnam	1,599

Device Ownership

What devices are internet users most likely to own and how does this vary by region and age?

KEY HEADLINES

- **Smartphone ownership is now virtually universal; some 94% have one of these devices, up 16 percentage-points since last year.** Smartphones have overtaken PCs/laptops across the regions, with a substantial gap across APAC, LatAm and the Middle East and Africa.

- **PCs/laptops have seen a decline in the past year but there's still three-quarters who have one.** The older the internet user, the more likely they are to have a PC/laptop.

- Although many continue to discuss 'the death of tablets', **the tablet audience is not one to be forgotten and there's still about 40% who have one.** Parents, those in North America and the top income quartile are most likely to.

- The smartwatch market is yet to catch fire, with price and comfort remaining key issues. **Just 7% claim to have a smartwatch,** though this is pushed by high ownership in China and India – markets where a 'smartwatch' can encompass a diverse range of devices. In the UK and US, Smartwatch Owners are most likely to have an Apple Watch.

- Importantly, digital consumers don't necessarily choose one device over another. Rather, **they are multi-device owners, having an average of 3.2 of the devices we track.**

DEVICE OWNERSHIP

% who personally own the following devices

SMARTPHONE	94%
PC/LAPTOP	76%
TABLET	39%
SMART TV	34%
GAMES CONSOLE	22%
FEATURE PHONE	14%
E-READER	12%
TV STREAMING STICK/DEVICE	12%
SMART WRISTBAND	9%
SMARTWATCH	7%
VIRTUAL REALITY HEADSET/DEVICE	4%

%-POINT CHANGE Since Q1 2015

SMARTPHONE	16
PC/LAPTOP	-13
TABLET	-8
SMART TV	0
GAMES CONSOLE	-12

AVERAGE NUMBER OF DEVICES OWNED

Total	3.2
16 to 24	3.1
25 to 34	3.4
35 to 44	3.3
45 to 54	3.2
55 to 64	3.0

Question: Which of the following devices do you personally own?
Source: GlobalWebIndex Q2 2017 | **Base:** 89,029 Internet Users aged 16-64

PRO Platform:
Device Ownership & Access > Device Ownership

EXPLORE THE DATA

Device Usage Trends

To what extent and for what reasons are digital consumers using the devices they own?

KEY HEADLINES

▪ **The percentage getting online via a smartphone is 50% higher now than it was in 2012.** Daily time spent online on these devices has passed the 3-hour per day mark in 2017 and 16-24s now spend almost as long online an a mobile as a PC/laptop.

▪ **Over 60% say their smartphone is their most important internet device.** All regions now attach greater importance to their mobile than their laptops, though the difference is much narrower in Europe and North America.

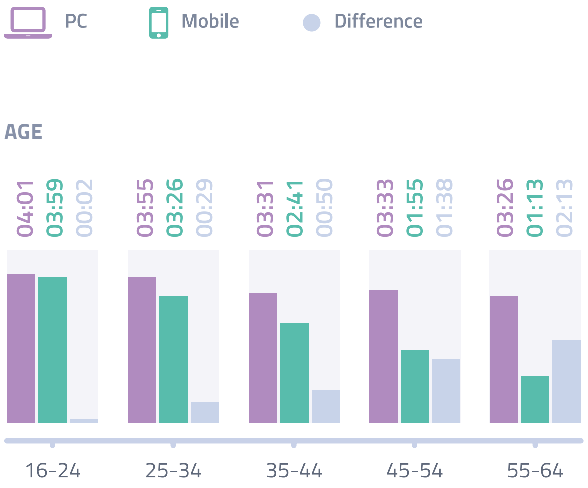
▪ Each year there has been consistently fewer people accessing the internet via a computer – it's now just three-quarters who do. That said, **PCs/laptops still capture 55% of online time, and it's not the case that people are substituting their computers for their smartphones** – PCs/laptops remain especially important for browsing behaviors like using search engines and visiting retail sites.

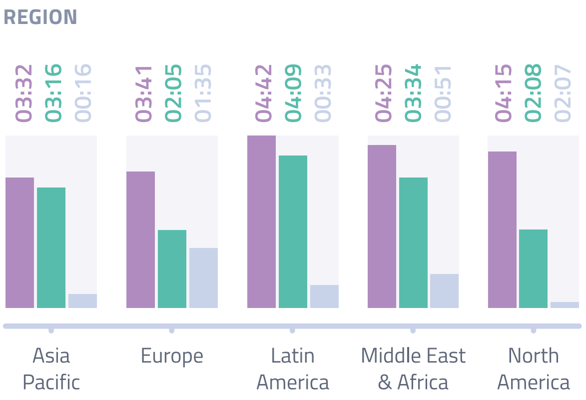
▪ There are now no online behaviors where Tablet Users are more likely to turn to their tablets than their mobiles. That said, **Tablet Users are almost as likely to be watching TV on their tablet (40%) as their mobile (47%).** These devices seem more suited for purposes like watching TV and browsing the web, when a mobile screen will not suffice.

▪ Smartphones and PCs/laptops are the top devices for gaming, with fast-growth markets having a lead for both. **Over 70% in APAC are gaming on mobiles, compared to less than half in Europe, for example.** Console gaming is much less popular (22%), though it sees stronger engagement in markets like the US and UK (both on 43%) and among the top income quartile.

TIME SPENT ONLINE: **BY AGE & REGION**

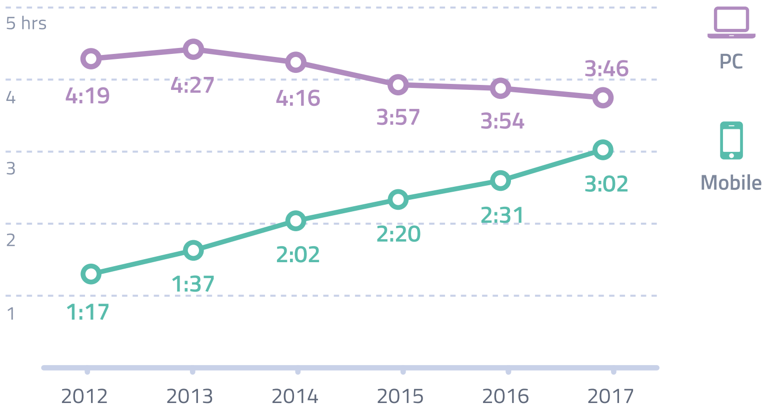
Average Hours:Minutes per Day



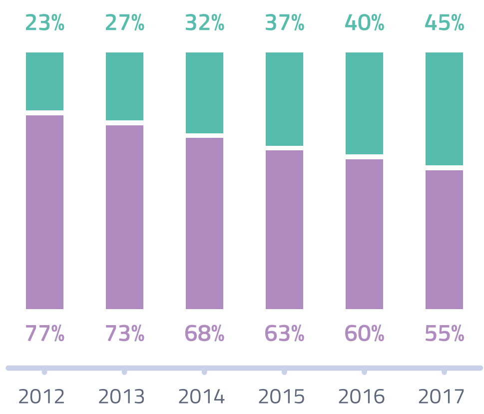


TIME SPENT ONLINE: **PCS VS MOBILES**

Average daily hours and minutes spent online via



% share of online time



Question: Roughly how many hours do you spend online on a PC/Tablet/Laptop or a mobile during a typical day? | **Source:** GlobalWebIndex 2012-2017 (averages across each wave of research conducted in each year) | **Base:** 61,196 (2012), 156,876 (2013), 168,046 (2014), 198,734 (2015), 211,023 (2016) & 178,421 (2017) Internet Users aged 16-64; 89,029 (Q2 2017) Internet Users aged 16-64

PRO Platform: Media Consumption > Daily Time Spent on Media > Time Online on Mobile

EXPLORE THE DATA

The Mobile Marketplace

Which handset brands are dominating the mobile market?

KEY HEADLINES

▪ Fast-growth markets hold the key to renewed smartphone sales for manufacturers, with online populations rapidly growing here. In Europe and North America, mobile adoption has slowed as digital consumers upgrade at a leisurely pace: **23% in North America and Europe have had their mobile for more than 2 years, for example, vs just 13% in APAC.**

▪ **27% of internet users plan to upgrade or buy a new phone within the next 6 months,** with a further 30% planning to do so in under a year. Men are most likely to be in the market for a new phone, as are 25-34s and the top income quartile.

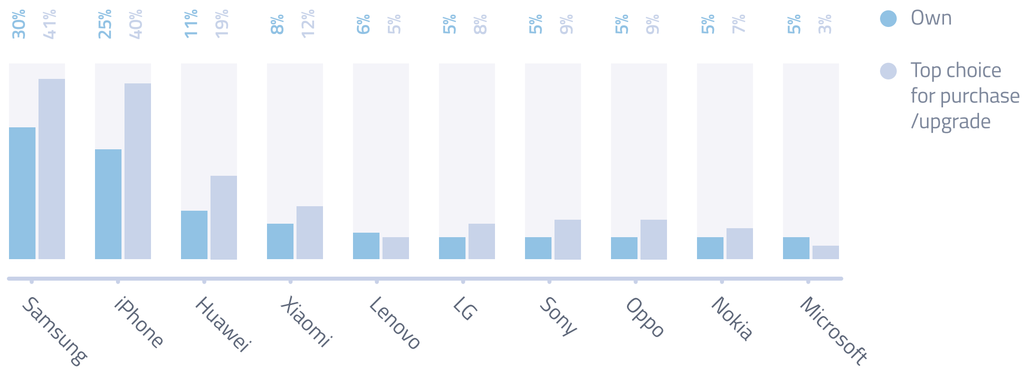
▪ **Android is by far the most dominant mobile OS, currently used by 70%.** iOS is in second place, on 25%, with usage growing by 150% since 2012. Android posts its highest figures among men and the lower income quartile, while women and the top income quartile are most likely to be using iOS.

▪ **Samsung is the top handset brand, but the gap between it and Apple has narrowed notably over time** and it's now just 5 percentage-points separating them. Apple and Samsung score almost equal when it comes to purchase intention, with about 40% saying they would consider upgrading to the brands.

▪ **Apple has made a big push into China lately and it can now claim to be the top handset brand here.** It is yet to see great successes in India, though, where internet users are over 2.5x as likely to have a Samsung. In a market dominated by cheaper handsets, the iPhone is limited by its high price-point in India.

TOP 10 MOBILE HANDSET BRANDS

% who own or plan to purchase/upgrade to the following handset brands



MOBILE BRAND CONSIDERATION

% who say the following would be their top choice(s) of brand when upgrading/buying a new phone

iPHONE OWNERS	
iPhone	82%
Samsung	28%
Huawei	15%
Xiaomi	9%
Oppo	7%

SAMSUNG OWNERS	
Samsung	76%
iPhone	34%
Huawei	11%
Sony	10%
LG	9%

Question: Which of the following mobile brands do you currently own? // Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone? | **Source:** GlobalWebIndex Q2 2017 | **Base:** 89,029 Internet Users aged 16-64

PRO Platform: Device Ownership & Access > Current Ownership

EXPLORE THE DATA

More from GlobalWebIndex

REPORTS

FLAGSHIP REPORTS
Our flagship reports present insights and statistics on social networking, device usage, online purchasing and entertainment.

MARKET & REGION REPORTS
Tracking key digital behaviors and engagement rates at a national or regional level, providing the very latest headline figures as well as looking at trends over time and across demographics.

AUDIENCE REPORTS
In-depth examinations of particular groups, assessing their most important behaviors and motivations as well as what sets them apart from the wider online population.

INSIGHT REPORTS
Deep-dives into some of the most pressing topics for marketers, from traditional vs digital media consumption to audience measurement issues.

TREND REPORTS
Tracking the stories of the moment, from ad-blocking and live streaming to VPNs and multi-networking.

INFOGRAPHICS
One-page visual summaries of key services, behaviors & audiences.

To see all of our available reports

CLICK HERE

PLATFORM

The questions and data-points featured in this report are available to explore on our Platform. They can be analyzed by any audience, date range or selection of countries/regions, with users able to build bespoke audiences based on our wide range of demographic, attitudinal and behavioral variables.

Each chart is accompanied by a hyperlink which will take you to the appropriate section on our Platform; simply click on the relevant link to start exploring the data further.

CLICK HERE *To start a Platform free trial*

GWIQ

GWIQ offers clients the ability to create bespoke audiences on the platform by connecting the GWI panel and passively monitored visitation to their own websites/campaigns. Segment your visitors by the actions taken on your site then profile them utilizing the 100% declared data you already find in our Platform. Validate digital campaigns against rich targets far beyond demographics. Understand the impact of digital campaigns on brand perceptions by sending bespoke advertising effectiveness surveys to panelists using a control vs exposed methodology.

CLICK HERE *To find out more about GWIQ*

GWI CUSTOM

GlobalWebIndex can also offer a variety of custom solutions to suit all your data and insight needs. All projects are conducted in close consultation with clients and resulting data is available for analysis in our Platform.

Our Custom offerings include:

BRAND SOLUTIONS
Brand Health
Brand Tracker
Brand Profiling

PRODUCT SOLUTIONS
Usage and Attitudes
Price Point
Platform Testing
Concept Testing

CAMPAIGN & AUDIENCE SOLUTIONS
Segmentation
Campaign Measurement
Audience Profiling
Audience Targeting

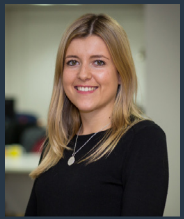
CLICK HERE *To find out more about GWI Custom* globalwebindex

Jason Mander

Chief Research Officer

E jason@globalwebindex.net

@thejasonmander



Katie Young

Senior Trends Analyst

E katie@globalwebindex.net

@katie_young11

www.globalwebindex.net

T + 44 207 731 1614 /// E hello@globalwebindex.net

/// A 25 Farringdon Street, London, EC4A 4AB, UK