

GWID DEVICE

SUMMARY

GlobalWebIndex's quarterly report on the latest trends
for smartphones, tablets, smart TVs and wearables

Introduction

GWIDevice is where GlobalWebIndex presents the very latest trends in smartphone, tablet and connected device usage.

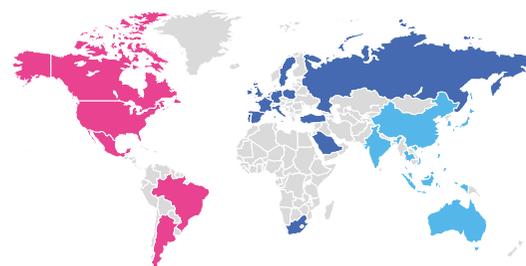
Drawing on data from our Q2 2015 wave of research among 47,496 adults across 34 markets, we offer insights on:

- Ownership and usage figures across all major devices
- Current engagement with smartwatches
- Online privacy and data protection measures
- Favored operating systems, handset brands and models
- The most popular apps, activities and online behaviors across devices

In this summary version, we present some of the key headlines and stats.

Notes on Methodology

Each year, GWI interviews **200,000 internet users across 34 markets** – making it the largest on-going study into the digital consumer instigated to date.



AMERICAS: Argentina ▪ Brazil ▪ Canada ▪ Mexico ▪ USA

EMEA: Belgium ▪ France ▪ Germany ▪ Ireland ▪ Italy ▪ Netherlands ▪ Poland ▪ Portugal ▪ Russia ▪ Saudi Arabia ▪ South Africa ▪ Spain ▪ Sweden ▪ Turkey ▪ UAE ▪ UK

APAC: Australia ▪ China ▪ Hong Kong ▪ India ▪ Indonesia ▪ Japan ▪ Malaysia ▪ Philippines ▪ Singapore ▪ South Korea ▪ Taiwan ▪ Thailand ▪ Vietnam

Research is conducted in quarterly waves, each of which has a global sample size of around 50,000 internet users. Typically, we interview between 3,000 and 8,000 people per year per market, with larger sample sizes in key countries such as the UK and the US (30,000 each). Data is collected in the last six weeks of every quarter, ensuring it is as up-to-date as possible.

Respondents complete an **online questionnaire** that uses stratified sampling techniques to ensure that they are **representative of the internet population aged 16 to 64** in each country (with correct proportions in terms of gender, age and educational attainment).

This data is used to calculate the **universe estimates** which we present throughout this report. Universe figures are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

Device Ownership

▪ PCs and laptops are still the most commonly owned and used devices, but about **80% now have a smartphone and close to 50% have a tablet**. Although the scale and speed of the changes should not be exaggerated, it's also the case that web access via PCs is trending downwards slightly as the mobile web continues to edge upwards.

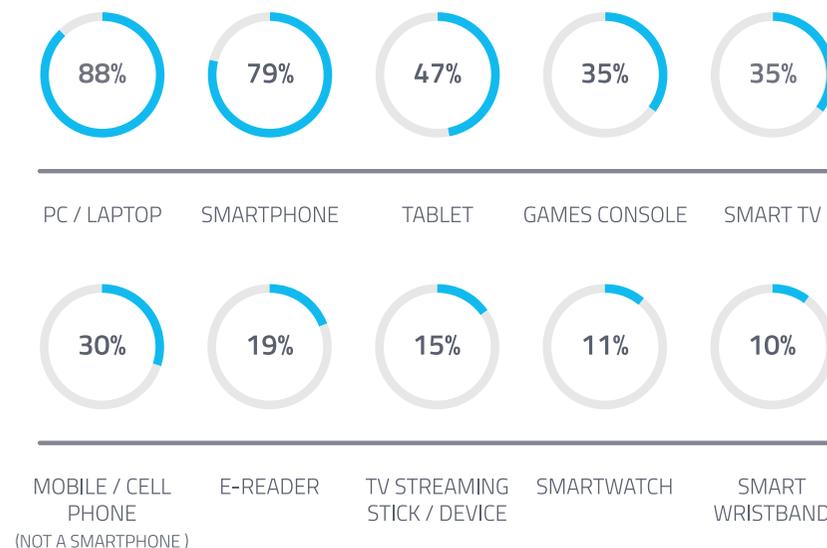
▪ **Smartphone ownership is highest among 25-34s, the top income quartile and in fast-growth markets**. China can boast both the highest percentage of all (88%) and the largest number of smartphone owners (400m+).

▪ **Wearable devices remain niche, with 1 in 10 owning a smartwatch**. However, rates in most European and North American countries remain around the 5% level, with the global figure being driven upwards by China. In this market, 20% say they have a smartwatch, but it's important to recognize that the country's e-commerce sites have low-end smartwatch devices available for as little as \$20 USD.

▪ **Three quarters of internet users are now going online via a mobile, while more than a third are connecting via a tablet**. There are significant segments who own a tablet, smart TV or games console who are not using them to go online, but in the case of TVs it's likely that streaming devices (owned by 15%, with a peak in the USA) are bridging much of the gap.

DEVICE OWNERSHIP

% of internet users who own the following



NOTE: RESPONDENTS SEE THE FOLLOWING DEFINITIONS/ILLUSTRATIVE EXAMPLES:

Smartphone: a phone that allows you to download apps, send/receive emails and browse the internet. Smartphones include iPhone, BlackBerry and Android phones such as the Samsung Galaxy s6

Tablet: e.g. an Apple iPad, Samsung Galaxy Tab, Microsoft Surface, Google Nexus

Smart TV: a television that can connect to the internet.

TV streaming stick/device: a digital media device which streams web content to your TV set, e.g. Apple TV, Amazon Fire TV Stick, Google Chromecast, Roku Player

Smartwatch: e.g. Pebble, Sony Smartwatch, Samsung Galaxy Gear, Apple Watch

Smart wristband: e.g. Nike Fuelband, Jawbone Up, Adidas miCoach

Question: Which of the following devices do you personally own? ▪ **Source:** GlobalWebIndex Q2 2015 ▪ **Base:** Internet Users aged 16-64

Want to explore this data in PRO Platform?
[CLICK HERE: Internet Landscape > Access Points > Device Ownership](#)

Device Usage Trends

- Daily time spent on the mobile web has now passed the 2-hour mark, led by LatAm (3.5 hours).
- 16-24s are at the forefront of mobile internet usage; they spend 3.25 hours per day online via their smartphones (which equates to 43% of their total internet time).
- Almost all internet users are second-screening, with mobiles the preferred device. Dual-screeners are most likely to be chatting with friends.
- Over half of tablet users are sharing their device, as are about 30% of mobile users, showing the problems inherent to tracking usage via passive analytics alone. In particular, tablet sharing among families is widespread.
- More than a quarter have used a VPN/Proxy Server, with accessing better entertainment the most common motivation. 1 in 4 internet users are employing ad-blocking software each month.

Question: Roughly how many hours do you spend on the following on a typical day? ▪ **Source:** GlobalWebIndex Q2 2015 ▪ **Base:** Internet Users aged 16-64

TIME SPENT ONLINE

GLOBAL

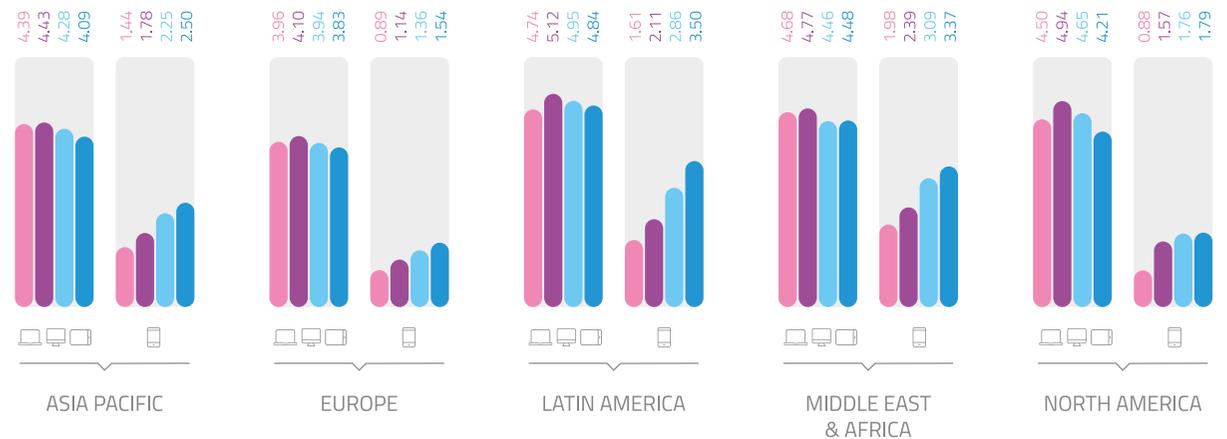
● PC / Laptop / Tablet ● Mobile



BY REGION

● 2012 ● 2013 ● 2014 ● 2015

HOURS PER DAY



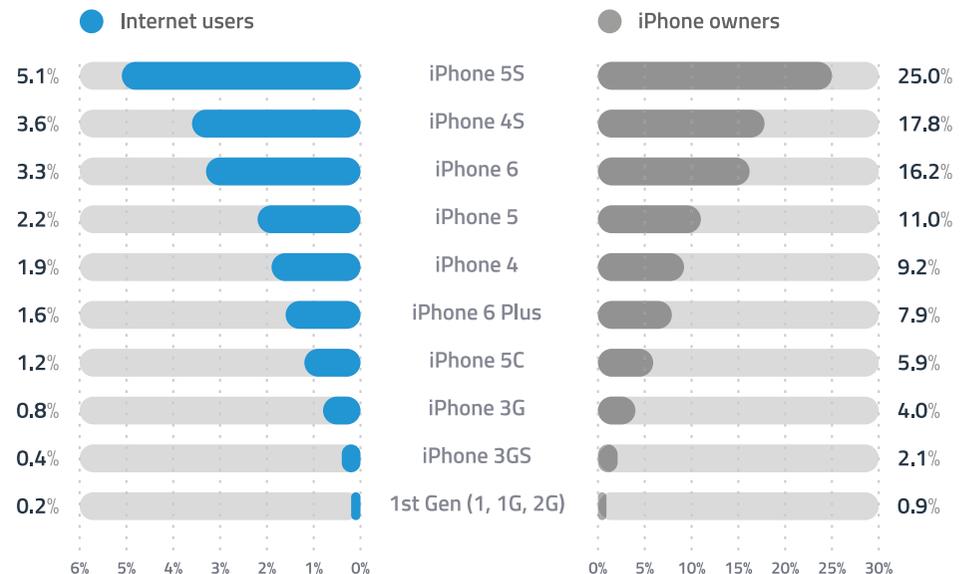
Want to explore this data in PRO Platform? [CLICK HERE: Media Consumption > Cross Media Consumption > Time Spent...](#)

Mobile and Tablet Trends

- **Android remains the No.1 mobile OS in all countries**, with Apple's iOS posting its best figures in markets such as Australia, Canada and the US as well as among younger and more affluent segments.
- **Samsung is the most popular mobile handset brand globally but it's the iPhone which leads for future purchase consideration.** In China, 1 in 4 have an Apple handset but 40% say they would consider purchasing an iPhone. A fifth of Chinese consumers now have a Xiaomi mobile.
- **A quarter of iPhone owners have a 5S, but 16% already have a 6 handset.** North America leads but APAC posts strong figures, showing the importance of Asia to Apple.
- **Rates of 4G usage are rising as 3G falls.** It's now 25% who use 4G, with figures much higher among iPhone, and especially iPhone 6, owners.
- **Android is the most favored OS when it comes to tablets**, being used by almost a fifth of internet users and leading iPad by 5 points.

iPHONE MODELS

% who have the following model



Question: You said that you have an iPhone. Please could you tell us which model it is? ▪ *Source:* GlobalWebIndex Q1-Q2 2015 ▪ *Base:* Internet Users Aged 16-64

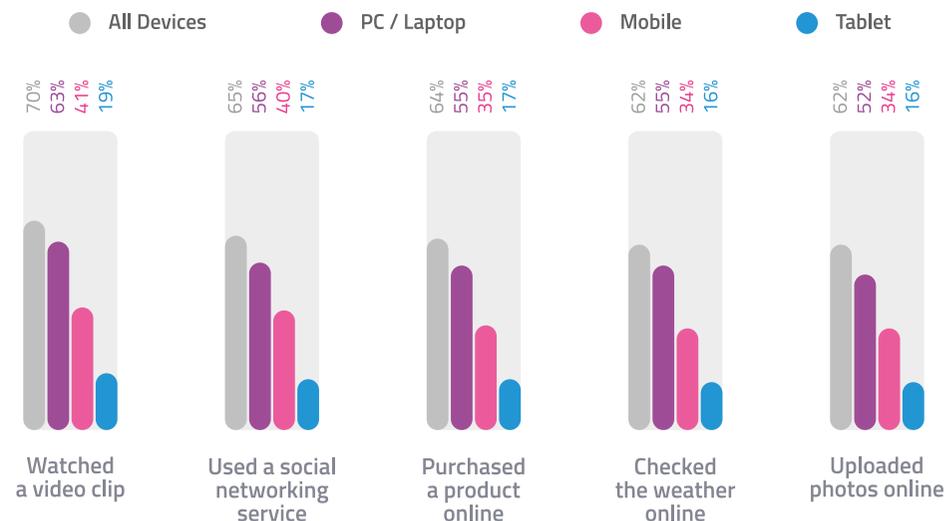
Want to explore this data in PRO Platform?
[CLICK HERE: Mobile > Mobile Model Ownership > iPhone Model Ownership](#)

Apps and Activities

- **By genre, gaming and social networking apps are most popular** – c. 45% are using them each month.
- By age, there's a clear division between 16-34s and 35-64s. The latter are furthest ahead for functional applications relating to maps, the news and finance. In stark contrast, 16-24s over-index for augmented reality tools and are ahead for many entertainment-related apps. 25-34s lead for loyalty apps, showing their love of shopping, while location-based dating apps are most popular among this age group.
- **Watching a video clip is the most popular online activity:** 7 in 10 online adults are doing this each month.
- **Search engines** remain a major go-to point for digital consumers on all devices: 85% visited one last month. Social networking and micro-blogging sites are among those embraced the most enthusiastically on mobile.

TOP ONLINE ACTIVITIES

% who did the following online last month



Question: Which of the following activities have you done online on your PC, Mobile or Tablet in the last month? ▪ *Source:* GlobalWebIndex Q1-Q2 2015 ▪ *Base:* Internet Users Aged 16-64



Want to explore this data in PRO Platform? [CLICK HERE: Cross Device > Online Activities > Online Activities Done in Last Month on PC, Mobile or Tablet](#)



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