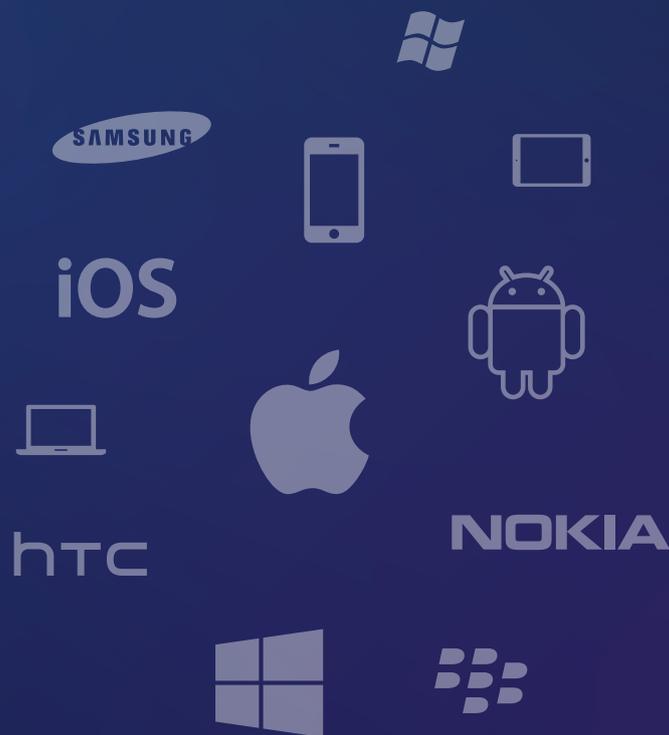


GWI Device Summary

Q2 2014



GlobalWebIndex's quarterly report on the latest trends in internet, smartphone and tablet usage

Introduction

GWI Device is where GlobalWebIndex presents the very latest figures for internet access and smartphone / tablet usage.

Drawing on data from our Q1 2014 wave of research, we offer insights on:

- The devices people are using to get online
- Prospects for wearable technology
- The importance of device sharing and VPN usage
- Favored operating systems for tablets and mobiles
- The most popular apps, activities and online behaviors across devices

With our data covering 32 markets – representing nearly 90% of the global internet audience – we offer the most up-to-date and comprehensive view of behaviors among digital consumers and highlight a number of key device, demographic and market-specific stories.

In this summary, we provide the key headlines and statistics from the report. For more detailed insights, coverage and implications, please see the full version.

Clients can access further detail on any of the topics covered in this report through our pre-cut data packs available to download in the Insight Store, or by analyzing them against target audiences in our PRO platform.

For device trends at a national level, please see our new Market Reports – each of which contains a section dedicated to mobiles and tablets.



Notes on Methodology

Each year, GWI interviews more than **170,000 internet users across 32 markets** – making it the largest on-going study into the digital consumer instigated to date.



AMERICAS

US // Canada // Mexico
// Argentina // Brazil

EMEA

UK // Ireland // France // Germany
// Italy // Spain // Netherlands //
Poland // Turkey // Russia // Sweden
// Saudi Arabia // UAE // South Africa

APAC

China // Hong Kong // Singapore //
India // Indonesia // Japan // Malaysia //
Vietnam // Thailand // Taiwan // South
Korea // Australia // Philippines

Research is conducted in quarterly waves, each of which has a global sample size of more than 40,000 internet users. In each country, we typically interview between 3,000 and 4,000 people every year, although the sample size is larger in key markets 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).

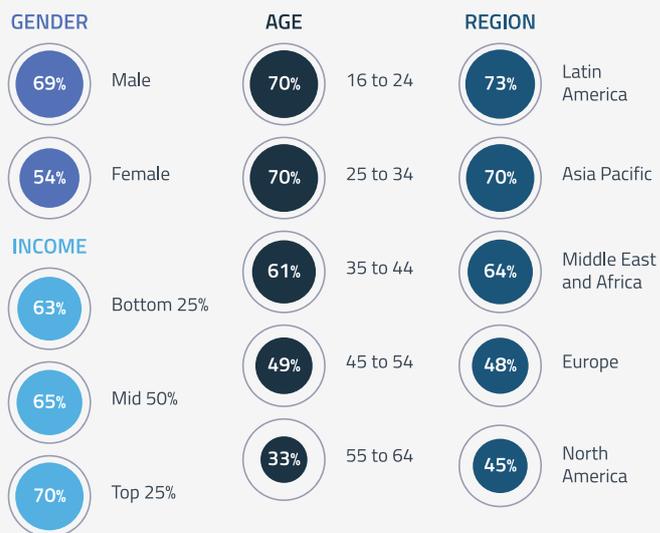
This data is used to calculate the **universe estimates** which we present throughout this report. Universe figures are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

Strong Interest in Wearable Tech

- Some **20%** say they've used a piece of wearable tech (e.g. a smart watch or a smart wristband), with a further **43%** interested in doing this in the future.
- Men (69%) have a lead over women (54%), while younger respondents are more than twice as engaged as the oldest age group (70% among 16-34s vs 33% for 55-64s).
- In terms of regions, North America (45%) is the least interested despite being the home of Google Glass. Consumers in Latin America (73%) and Asia Pacific (70%) are the most engaged.

Demographics of Wearable Tech

% have used or are interested in using wearable tech.

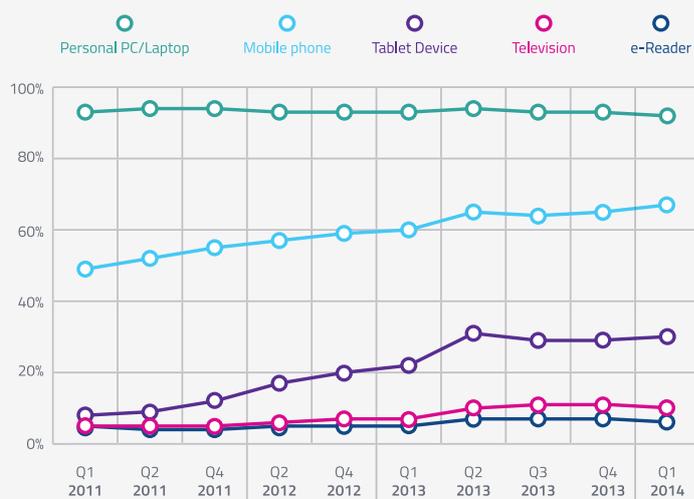


Question: Which of these things have you done already and which are you interested in doing in the future? Use wearable technology that connects to the internet (e.g. a smart watch, a smart wristband, Google Glass) // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet Users aged 16-64

Mobile and Tablet Internet Usage Levels Rising Quickly

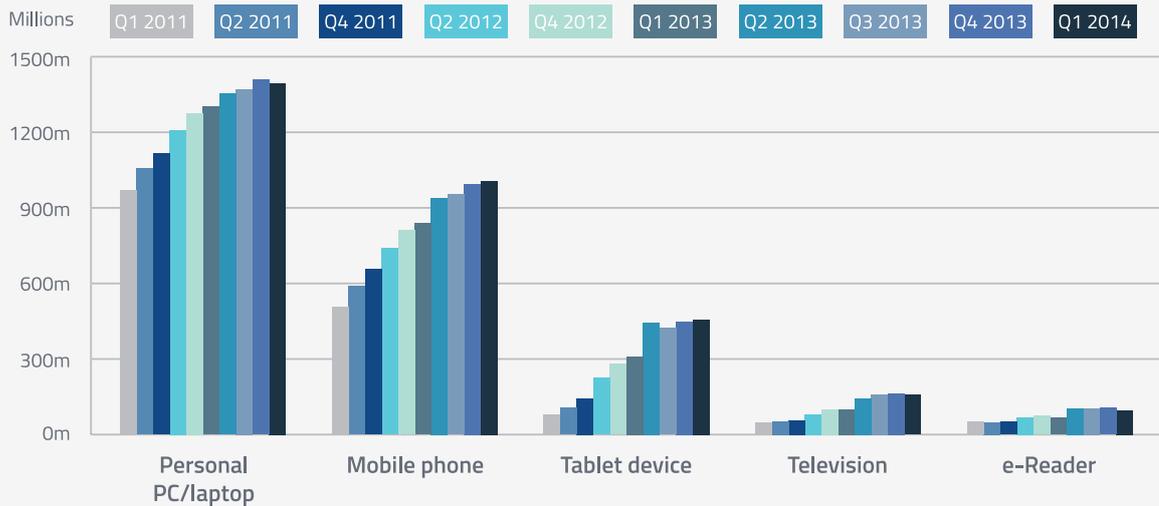
- More than two thirds (67%) of internet users are now accessing via mobiles, with 30% going online via tablets. Since 2011, the online audiences for these devices have risen in size by 99% and 482% respectively – heralding a truly multi-device internet landscape.
- Mobile internet usage is most widespread in Asia Pacific, while tablet usage is highest in North America.
- Across both devices, **25-34s are the biggest users**. 16-24s come a close second for the mobile internet, but 35-44s are the next biggest users of tablets.
- Android is the dominant operating system on both mobiles and tablets.** Its lead over iOS is particularly substantial for mobiles (66% vs 20%), whereas the figures are closer for tablets (53% vs 40%). iOS retains strong footholds among high income segments and in mature markets such as the US, UK, Australia and Sweden.

Internet Access by Device



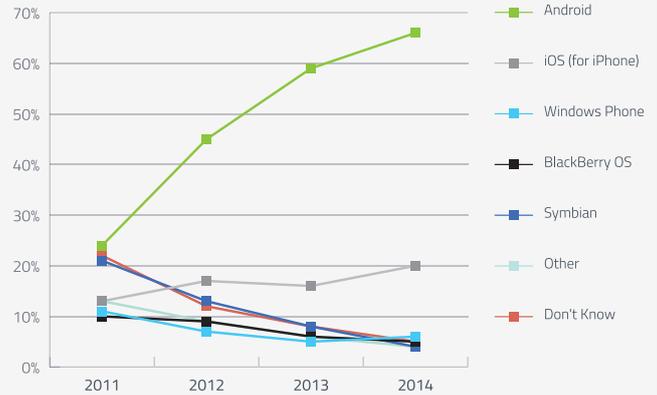
Question: In the past month, from which of the following devices have you accessed the internet either through a web browser or an application? // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet Users aged 16-64

Internet Access by Device



Question: In the past month, from which of the following devices have you accessed the internet either through a web browser or an application? // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet Users aged 16-64

Mobile OS

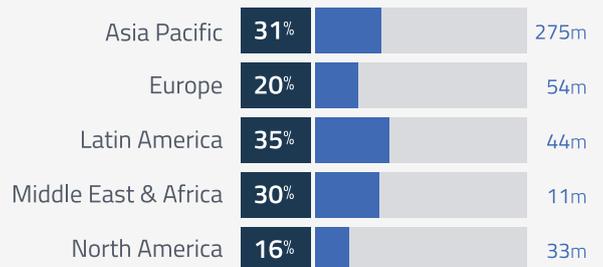


Question: What operating system runs on your mobile? // **Source:** GlobalWebIndex Q2 2011, Q2 2012, Q1 2013 and Q1 2014 // **Base:** Mobile owners aged 16-64 // **NOTE:** Total figures exceed 100% due to some respondents owning/using more than one mobile

Over a Quarter using VPNs

- Usage of VPNs is most pronounced in Latin America, APAC and the Middle East & Africa – regions where 30% or more of internet users say they have been online via one of these tools.
- Nationally, usage is highest in Indonesia (42%), Brazil (37%), Thailand (36%) and China (36%).
- There are multiple reasons for using these tools, but by far the greatest numbers of VPN users are looking for **better entertainment content (50%)** or **access to restricted social platforms (44%)**.

VPN Usage by Region



Question: When you access the internet, do you ever do so using a VPN (virtual private network) or proxy server? // **Source:** GlobalWebIndex Q4 2013 – Q1 2014 // **Base:** Internet users aged 16-64

Mobiles overtake Laptops as Favorite Second-Screen Device

▪ An impressive **86% of people say they have second-screened while watching television**. But in 2014, mobiles (57%) have now overtaken laptops (48%) as the top device for this.

▪ Chatting to friends (62%) is the number one reason for dual-screening – helping to explain the surging popularity of messaging apps over the last year. Since Q1 2013, **WeChat and WhatsApp have both seen increases in their global user numbers of 197%** (more than any other social app).

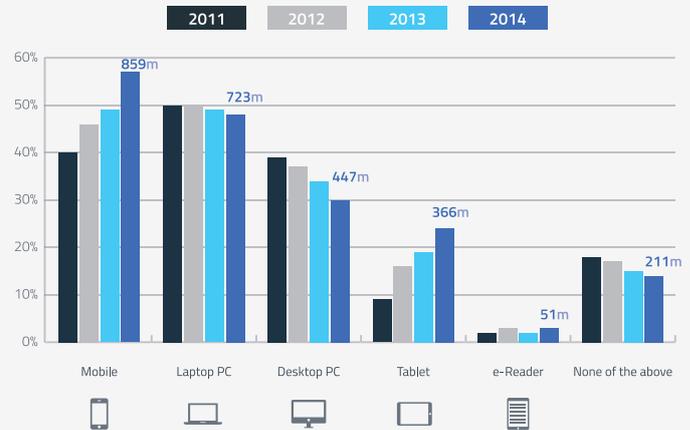
▪ Large numbers of second-screener are also reading new stories (62%) and playing games (44%). Far fewer are interacting directly with programs being watched – whether by sharing opinions about shows (15%) or interacting with supporting content (just 9%). Clearly, second-screen behaviors are highly “informal” in nature – i.e. not typically linked directly to the main TV screen.

Device Sharing is Widespread, Led by Parents and Couples

▪ **56% of tablet users are sharing their device with at least one other person**. And even with mobiles – usually considered to be highly “personal” – 24% still say that other people have use of their device.

▪ **Relationship status and family stage** have strong impacts over this. The more children someone has, the more likely they are to be sharing mobiles and tablets. Similarly, those who are married or in relationships are bigger sharers than those who are single.

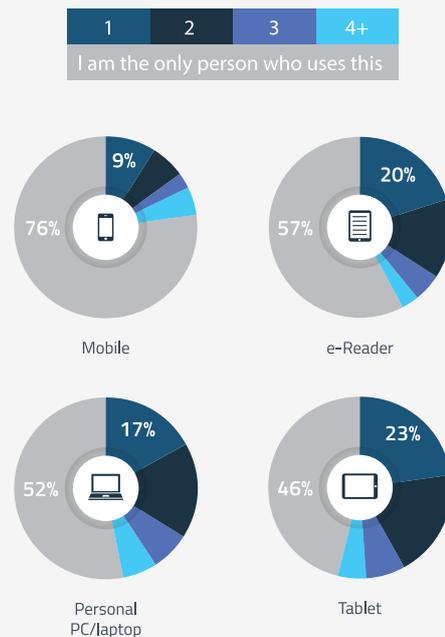
Second-Screening by Device



Question: Which of the following devices have you used while watching TV? //

Source: GlobalWebIndex Q2 2011, Q2 2012, Q1 2013 and Q1 2014 // **Base:** Internet users aged 16-64

Device Sharing



Question: Thinking about the devices you use to access the internet, can you please tell us how many, if any, other people use each one? // **Source:** GlobalWebIndex Q4 2013 – Q1 2014 // **Base:** Users of each device aged 16-64



Jason Mander
Head of Trends

E: jason@globalwebindex.net // O: +44 20 7731 1614
A Trendstream Limited, Bedford House, 69-79 Fulham
High Street, London, SW6 3JW, England

www.globalwebindex.net