globalwebindex

GWI Device

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

SUMMARY

FLAGSHIP REPORT Q1 2017
www.globalwebindex.net

Introduction

GWI Device places a spotlight on the latest ownership and usage trends across all major device categories – including smartphones, PCs/laptops, tablets, smartwatches and smart TVs.

Drawing on data from our most recent wave of research among over 50,000 internet users aged 16-64, we offer insights on:

- Which devices are the most widely owned and used internet devices – including the popularity of games consoles and wearable devices.
- Which device consumers consider to be their most important internet access point, and how this varies by age and region.
- How much time is being spent online via mobiles and PCs/laptops, and the online behaviors that are most likely to be taking place on each of these.
- Which brands are winning the battle in the smartphone marketplace and the models that are most popular among mobile owners.
- The prevalence of ad-blocking across mobiles and desktop and the numbers deploying VPNs as they get online.

In this summary version, we highlight key insights and figures from our research.

To read the full version of this report, start a free trial with GlobalWebIndex HERE.

Content

Notes on Methodology

Each year, GWI interviews over 350,000 internet users, asking a wide range of questions about their lives, lifestyles and digital behaviors.

To ensure that our research is reflective of internet users, 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.

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America 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. 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.**

Please keep in mind that **all figures given in this report relate to the country's internet users, not to its total population.**

INTERNET PENETRATION RATES

(ITU INTERNET PENETRATION METRIC 2015)

Japan	93%	Malaysia	71%
Netherlands	93%	Saudi Arabia	70%
UK	92%	Argentina	69%
UAE	91%	Portugal	69%
Sweden	91%	Poland	68%
South Korea	90%	Italy	66%
Canada	88%	Brazil	59%
Germany	88%	Mexico	57%
Belgium	85%	Turkey	54%
Hong Kong	85%	Vietnam	53%
France	85%	South Africa	52%
Australia	85%	China	50%
Singapore	82%	Philippines	41%
Taiwan	82%	Thailand	39%
Ireland	80%	Egypt	36%
Spain	79%	India	26%
United States	75%	Indonesia	22%
Russia	73%		

SAMPLE SIZE BY MARKET

Q4 2016 SAMPLE SIZES

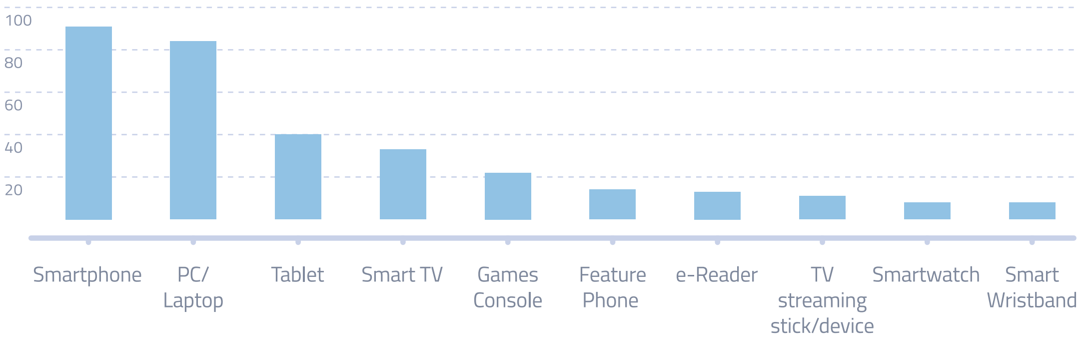
Argentina	762	Philippines	769
Australia	765	Poland	764
Belgium	775	Portugal	759
Brazil	1518	Russia	1251
Canada	1507	Saudi Arabia	763
China	7553	Singapore	764
Egypt	785	South Africa	755
France	2017	South Korea	759
Germany	2033	Spain	2014
Hong Kong	751	Sweden	761
India	2520	Taiwan	751
Indonesia	770	Thailand	767
Ireland	1008	Turkey	759
Italy	2013	UAE	758
Japan	1518	UK	7505
Malaysia	767	USA	7528
Mexico	764	Vietnam	761
Netherlands	754		

Device Ownership

What are the most commonly-owned devices and how many now own a wearable device?

DEVICE OWNERSHIP

% who personally own the following devices



Respondents see the following definitions & illustrative examples

e-READER: a digital reading device, e.g. Amazon Kindle, Kobo, Nook etc

SMART TV: A television that can connect to the internet

SMART WRISTBAND: A digital wristband which typically tracks your health and fitness levels. Popular examples include Nike Fuelband, Jawbone Up and Fitbit

SMARTPHONE: An internet and app-enabled phone such as the iPhone, a BlackBerry or Android phones like the Galaxy S series

SMARTWATCH: A watch which allows you to connect to the internet and use apps. Popular smartwatches include Pebble, Sony Smartwatch, Samsung Galaxy Gear and the Apple Watch

TABLET DEVICE: e.g. an Apple iPad, Samsung Galaxy Tab, Microsoft Surface, Google Nexus tablet

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 Streaming Player

KEY HEADLINES

- Globally, **smartphones are the most commonly-owned devices** (91%), having built up a 7-point lead over PCs/ laptops (84%). Smartphone ownership is virtually universal, although 45-64s, North Americans and Europeans are still more likely to have a PC/laptop.

- **Tablets seem to have lost some of their momentum in recent quarters.** Having reached peak ownership mid-2015, they have been heading downwards since. That 16-24s are outpaced by the other age groups suggests this trend is likely to continue.

- **Wearables remain niche products,** owned by fewer than 1 in 10 digital consumers. The availability of cheap smartwatches in many Asian markets helps boost numbers here but in Europe/North America it's only c.5% who have a smartwatch.

- It's not necessarily the case that one device replaces another. Rather, it's important to recognize that the vast majority of consumers are **multi-device owners** – owning an average of 3 of the devices we track.

Question: Which of the following devices do you personally own?
Source: GlobalWebIndex Q4 2016 | **Base:** 56,768 Internet Users aged 16-64

PRO Platform:
Device Ownership & Access > Device Ownership

EXPLORE THE DATA

Device Usage Trends

Which devices are most important for internet users, how long are people spending on mobiles and PCs/ laptops and how is this changing over time?

KEY HEADLINES

- There's around 40% more internet users getting online on a smartphone in 2016 (80%) than there were in 2012. **Mobiles are now internet users' most important internet devices and they continue to spend longer and longer each day on these devices** (2 ½ hours, rising much higher among 16-24s).

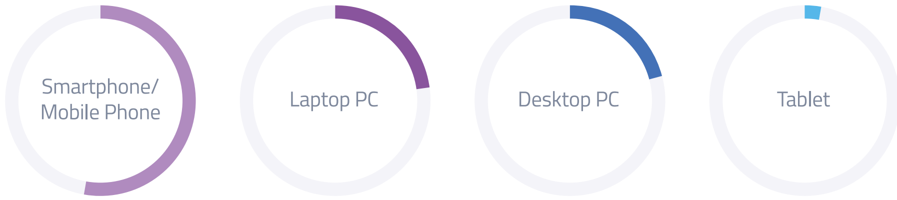
- **The numbers getting online via PC/ laptops has seen a small decline but these traditional devices still capture the lion's share of online time** (almost 4 hrs). What's more, older internet users and those in mature markets continue to perceive them as their most important devices. In particular, they remain especially key for commerce and entertainment-related activities.

- **The struggles facing tablets are clear once again:** despite some strong increases in the early parts of the decade, this rate of growth has now plateaued and saw a decline in 2016. What's more, there are now no categories where tablet users are more likely to be engaging via a tablet than via a mobile.

- Large numbers are choosing to share their devices: **60% of tablet users are sharing, for instance, as are a third of mobile users.** As a result, the total audience size for these devices is potentially much higher than passively collected analytics figures would indicate.

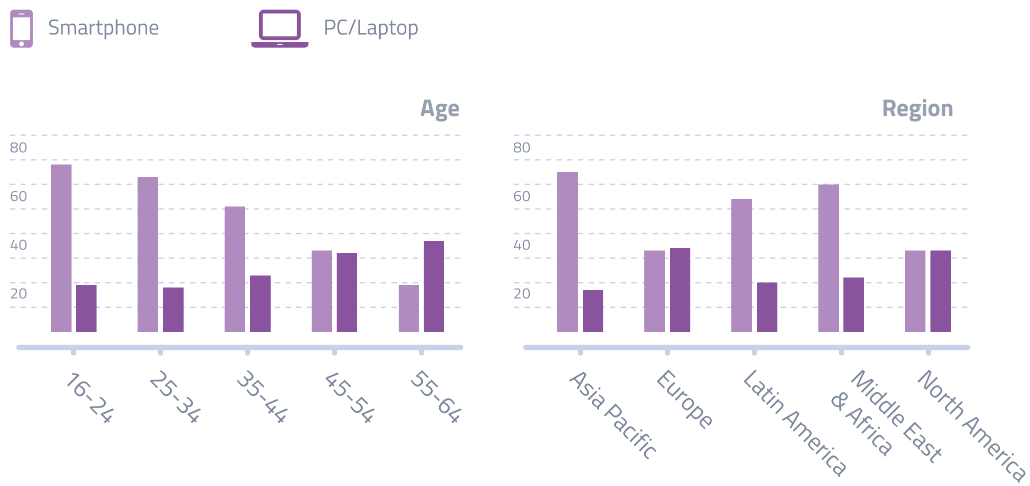
DEVICE IMPORTANCE

% who say the following is their most important device



SMARTPHONE VS LAPTOPS

% who say the following is their most important device



The Mobile Marketplace

In the competitive mobile marketplace, which are the best performing brands and how does this vary by market?

KEY HEADLINES

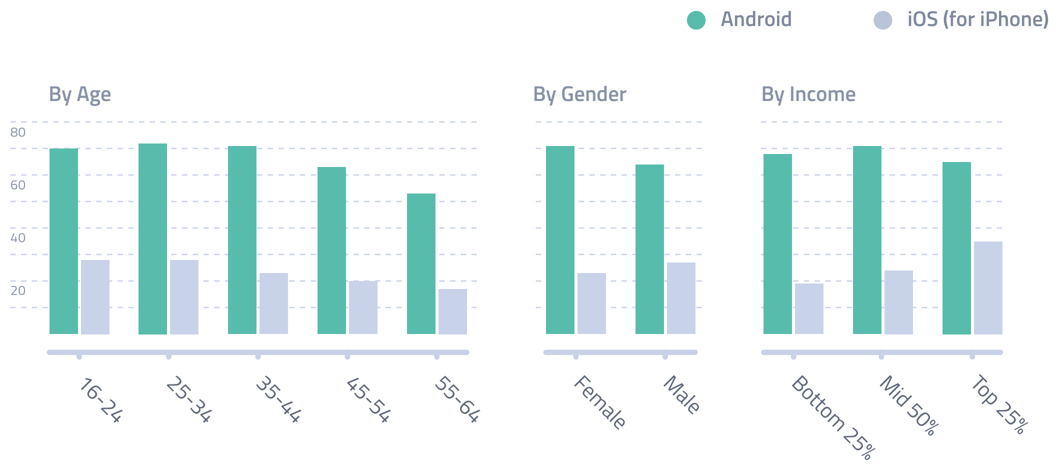
- **Fast-growth markets like India and Indonesia are accounting for an ever-larger share of those who say they intend to buy a mobile.** Online populations are rapidly growing, with the majority coming online for the first time via mobiles.

- **iOS usage has more than doubled since 2012 but Android remains by far the top operating system for mobiles:** 68% are using Android vs. 25% who use iOS for iPhone. Android posts its best figures in fast-growth markets, while Apple sees some impressive usage in key markets like Australia (40%), the USA (36%) and the UK (35%).

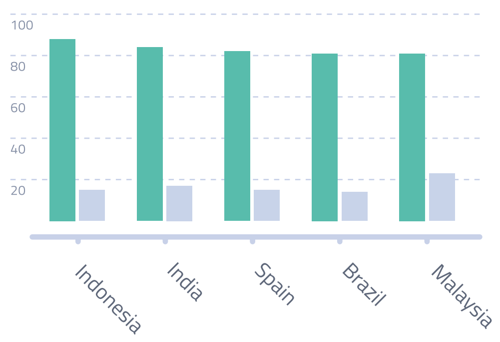
- **Samsung is the top handset brand,** with Apple a firm second. The iPhone has drawn ahead of Samsung in China (thanks to the success of the iPhone 6), but it has made much less of an impact in India.

- Samsung is slightly ahead when we ask consumers their top choice for an upgrade, but Apple has a highly loyal customer base: **an overwhelming 83% of iPhone owners say they want another iPhone.**

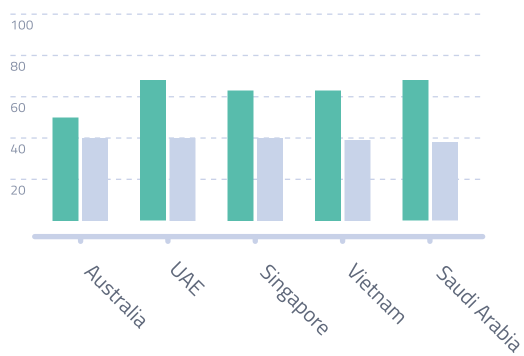
ANDROID VS iOS BY DEMOGRAPHICS



ANDROID TOP 5 MARKETS



iOS TOP 5 MARKETS



Privacy, Ad-Blocking and VPNs

How popular are VPNs and who is most likely to be deploying these tools? How many are now blocking ads on their desktops and mobiles?

KEY HEADLINES

- **30% of online adults are using VPNs** – meaning significant numbers are potentially invisible or else incorrectly geo-allocated by passive analytics. 25-34s and men are the most likely to be using these tools and we see some pretty big spikes in fast-growth markets like Saudi Arabia (51%) and Indonesia (47%).

- **Our data shows that it's 35% who are blocking ads on their desktops, while 32% are doing so on their mobiles** – pretty significant considering these tools have only recently come to the attention of consumers.

- **At present, mobile ad-blocking is concentrated in APAC.** But as mobiles become more and more dominant, it's only a matter of time before it spreads west.

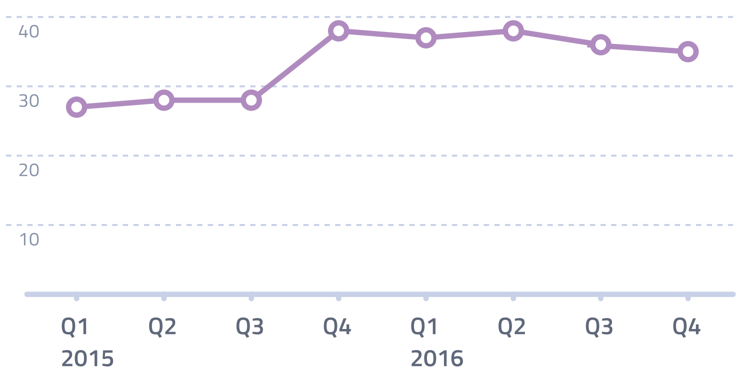
ONLINE PRIVACY MEASURES

% who did the following last month

Used a private browsing window	45%
Deleted cookies	35%
Used a desktop ad-blocker	35%
Used a mobile ad-blocker	32%
Used anti-tracking tools	16%

DESKTOP AD-BLOCKING OVER TIME

% who blocked ads on their main computer in the last month



Question: Which of the following things have you done when accessing the internet from your main computer? / Within the past month, have you used an ad-blocker on your mobile phone to prevent websites or apps from displaying ads when you visit them?'
Source: GlobalWebIndex Q4 2016 / GlobalWebIndex Q1 2015 - Q4 2016 | **Base:** 56,768 Internet Users aged 16-64

PRO Platform: Device Ownership & Access > Online Privacy Measures

EXPLORE THE DATA

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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.

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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.

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INFOGRAPHICS

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

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PRO PLATFORM

The questions and data-points featured in this report are available to explore on PRO 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 PRO Platform; simply click on the relevant link to start exploring the data further.

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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 the PRO 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 PRO 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*

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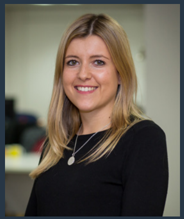

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