globalwebindex

GWI Entertainment

GlobalWebIndex's bi-annual report
on the latest trends in online entertainment

SUMMARY

FLAGSHIP REPORT Q3 2017

www.globalwebindex.net

Introduction

GWI Entertainment presents GlobalWebIndex's very latest figures for online entertainment behaviors. Among other topics, this report covers:

- The numbers engaging with online entertainment, including music, video and games.
- The role that PCs, laptops, mobiles and tablets are playing in online entertainment.
- The relationship between broadcast TV and online TV.
- The state of online music and video streaming, as well as which platforms are performing best.
- Which devices are most important for gaming, how gaming entertainment is evolving, and the opportunities this presents for brands.
- The impact of entertainment on the consumer-brand relationship.

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.**

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	India	29.5	New Zealand	88.5	Spain	80.6
Belgium	86.5	Indonesia	25.4	Nigeria	25.7	Sweden	91.5
Brazil	59.7	Ireland	82.2	Philippines	55.5	Taiwan	79.7
Canada	89.8	Italy	61.3	Poland	73.3	Thailand	47.5
China	53.2	Japan	92.0	Portugal	70.4	Turkey	58.3
Egypt	39.2	Kenya	26.0	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 for each market that GlobalWebIndex conducts online research in. 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 waves of research across 40 countries, which had 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	1510	Hong Kong	1257	Netherlands	1258	South Korea	1265
Australia	1262	India	3041	New Zealand	1274	Spain	2268
Belgium	1274	Indonesia	1785	Nigeria	750	Sweden	1255
Brazil	2281	Ireland	1271	Philippines	1532	Taiwan	1255
Canada	2295	Italy	2284	Poland	1266	Thailand	1520
China	8053	Japan	1754	Portugal	1321	Turkey	1512
Egypt	1299	Kenya	750	Russia	2273	UAE	1250
France	2276	Malaysia	1537	Saudi Arabia	1266	United Kingdom	7850
Germany	2336	Mexico	1555	Singapore	1521	United States	15946
Ghana	750	Morocco	750	South Africa	1528	Vietnam	1599

Engagement with Entertainment

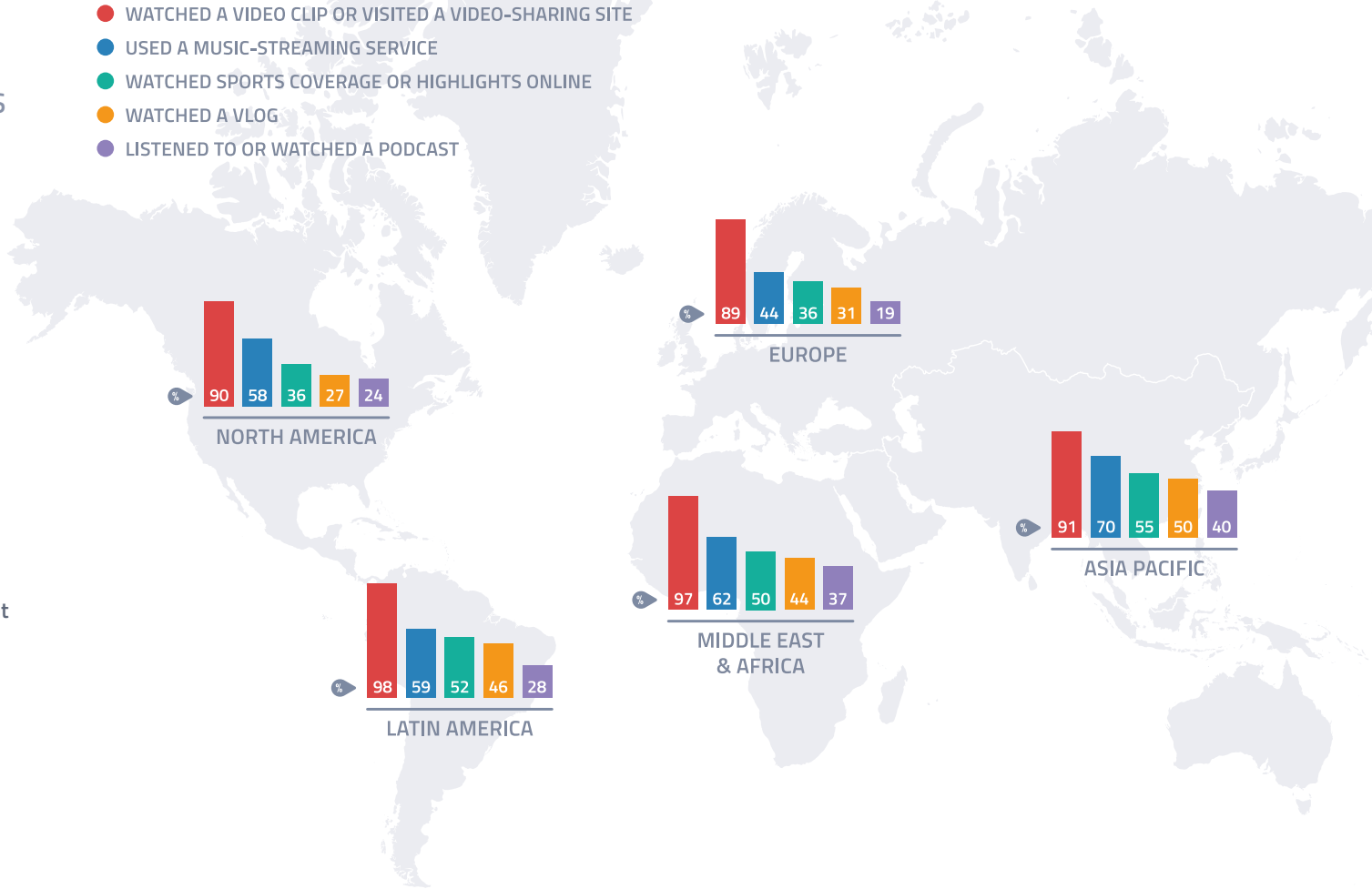
How are people engaging with entertainment online, and how does this differ between regions?

KEY HEADLINES

- **Around 9 in 10 online adults are watching video clips online each month,** with virtually every internet user in MEA doing so.
- Led by younger age groups and internet users in fast growth markets (particularly APAC), **music streaming is now a mainstream activity.**
- **Sports viewing online is also now an important entertainment activity,** with the popularity of online TV in fast growth markets driving up figures significantly

ONLINE ENTERTAINMENT ACTIVITIES

% of internet users who have done the following in the last month



Question: In the past month, which of the following things have you done on the internet via any device?
Source: GlobalWebIndex Q2 2017 | **Base:** 72,529 Internet Users aged 16-64

Platform: Online Activities and Behaviors > Online Activities in the Last Month

EXPLORE THE DATA

Television

What is the relationship between broadcast and online TV? Who is accessing streaming content and who is paying for it, which services have the highest uptake and where?

KEY HEADLINES

- **Mobiles are drawing parallel to PCs/laptops for video-based entertainment.** Better portability, impressive screen resolutions and, in some markets, mobile data-usage exceptions when streaming points to mobile's future role in the online entertainment landscape.

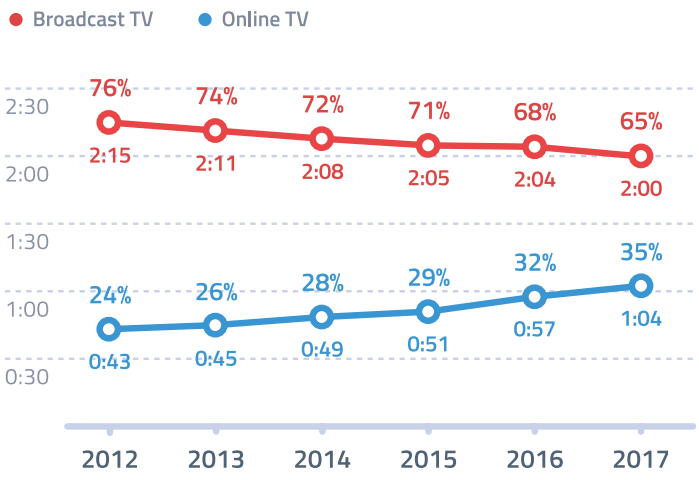
- **Daily time spent on online TV is gradually rising, while time spent on linear TV is steadily decreasing.** But it's becoming ever clearer that these two distribution channels can complement each other, rather than simply compete with each other.

- **TV/movie streaming service engagement is now mainstream, driven in part by account sharing.** Younger internet users are the most likely to be paying for this content, while older users are the most likely to be sharing their accounts.

- **Netflix dominates the movie/TV streaming sector on a global level.** Its global rollout has put it into direct competition with established – and culturally relevant – services in international markets. As such, it faces strong challenges in APAC and the Middle East & Africa, both in terms of local competition and in convincing consumers of the value of streaming services more broadly.

LINEAR VS. ONLINE TV

Share of Daily Time Watching TV - Average number of hours and minutes per day spent watching the following



Question: Roughly how many hours do you spend on watching TV during a typical day? / Roughly how many hours do you spend on watching online TV during a typical day? | **Source:** GlobalWebIndex 2012-2017 (averages of all waves conducted in each year) | **Base:** Internet Users aged 16-64

Platform: Media Consumption > Time Spent Watching Linear TV

EXPLORE THE DATA

Music

Who is accessing streaming content and who is paying for it, which services have the highest uptake and where?

KEY HEADLINES

- **In Europe and North America paid music streaming has surpassed paid music downloads.** But in other regions internet users still prefer paying for music downloads compared to music streaming services.

- **Spotify is the global leader in the music streaming industry.** Key to its continued success will be maintaining its ad-supported tier which has so far ensured that it boasts a larger reach than any competitor. **The popularity of this ad-supported model among potential users will likely assure it a place in Spotify's future monetization strategies, even if the functionality of its free tier is subject to change.**

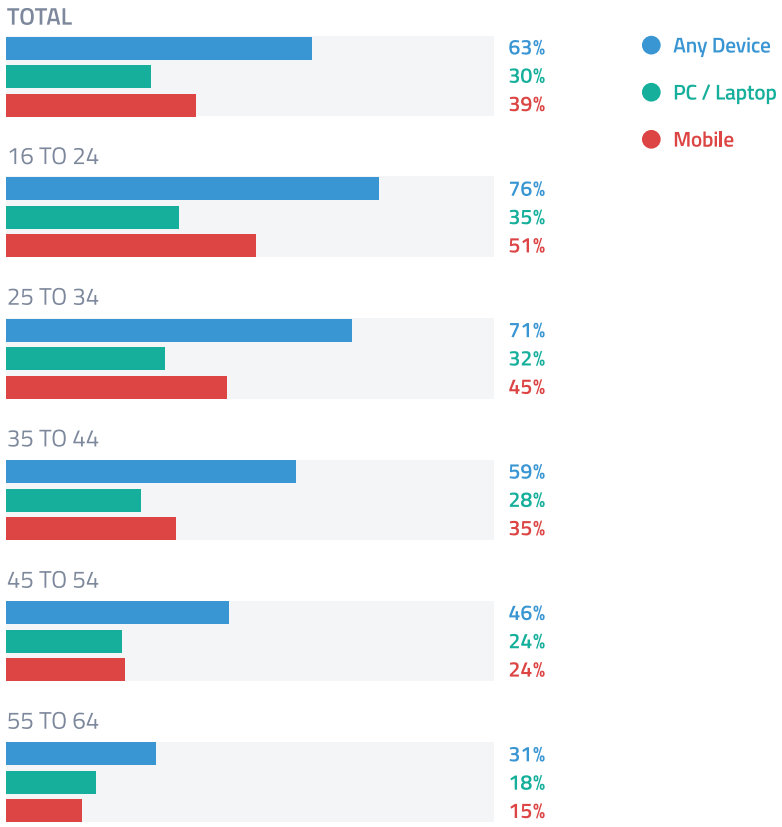
- **Internet users display a much stronger preference to access content services rather than own the content themselves.** Both the free availability of ad-supported music streaming services as well as the popularity of accessing music content on the likes of YouTube is having an impact here.

- Despite the overwhelming preference for paying to access content services rather than paying to own it, **internet users are still much more likely to be purchasing music downloads compared to music streaming services.**

- Like with TV/film streaming services, **younger groups are the most likely to pay for this content, and older groups are the most likely to share accounts.**

MUSIC STREAMING BY DEVICE

% who have used a music-streaming service in the last month via...



Question: In the past month, which of the following things have you done on the internet on a PC/Laptop, Mobile or Tablet? Used a music-streaming service | **Source:** GlobalWebIndex Q2 2017 | **Base:** 72,529 Internet Users aged 16-64

Platform: Online Activities and Behaviors > Online Activities in the Last Month

EXPLORE THE DATA

Gaming

Which are the most important gaming devices, how has gaming entertainment evolved with the migration of gaming activities online?

KEY HEADLINES

- **Gaming has been among the most impacted entertainment industries by the rise of the smartphone and free-to-play content.** Console ownership and usage rates are declining, but this is primarily happening in APAC and the Middle East & Africa where PC gaming is most popular. Europe, North America and LatAm are emerging as the core markets for consoles.

- **eSports entertainment is reaching new heights, and brands have a lot to gain here.** The narrow yet very desirable demographic which eSports attracts turn out to be a very brand-engaged – and in some cases ad-susceptible – bunch.

SPECTATOR GAMING

% of Gamers who have done the following in the last month

- Watched a live gaming stream
- Watched an e-sports tournament

AGE	16 to 24	31%	22%
	25 to 34	25%	20%
	35 to 44	20%	16%
	45 to 54	12%	10%
	55 to 64	7%	4%
GENDER	Male	27%	23%
	Female	18%	11%

INCOME	Bottom 25%	21%	15%
	Mid 50%	23%	18%
	Top 25%	26%	22%
REGION	Asia Pacific	25%	22%
	Europe	17%	9%
	Latin America	22%	14%
	Middle East and Africa	18%	9%
	North America	20%	7%

Question: Which of the following gaming-related activities have you done in the last month?
Source: GlobalWebIndex Q2 2017 | **Base:** 59,484 Gamers aged 16-64

Platform: Device Ownership and Access > Gaming Devices & Activities > Gaming Activities

EXPLORE THE DATA

Branded Entertainment

How can brands utilize entertainment consumption to further engage with consumers?

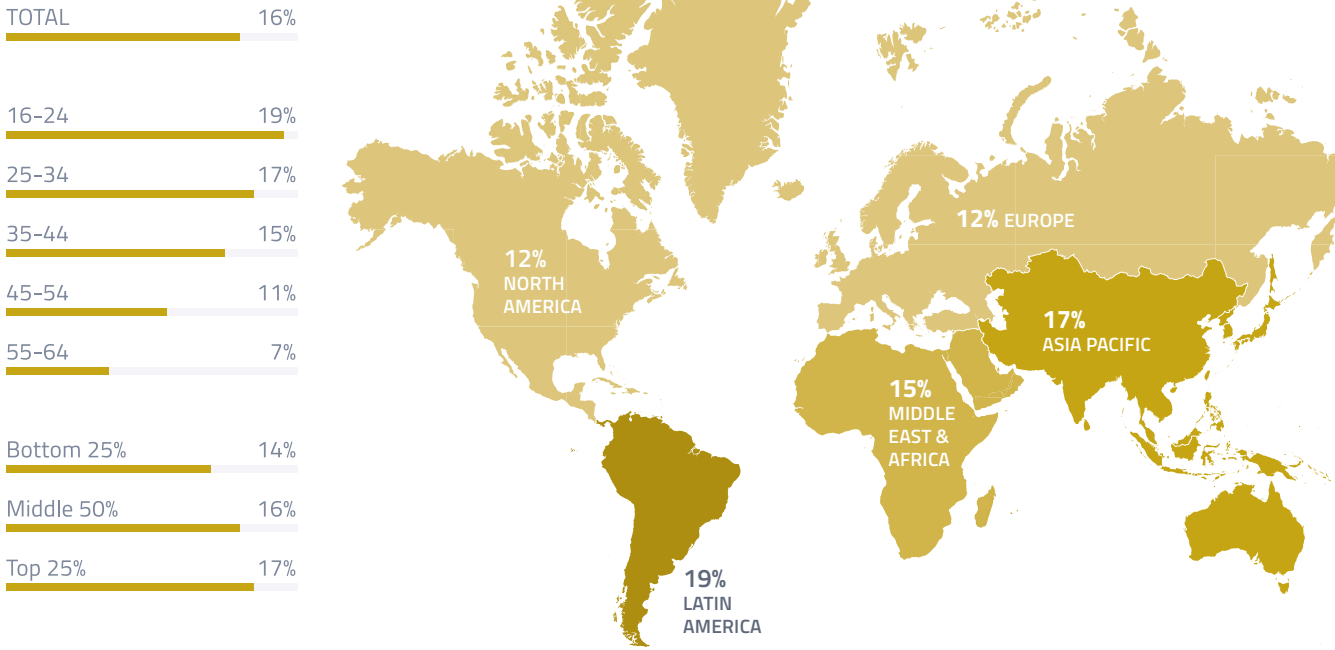
KEY HEADLINES

- **Entertainment has a crucial role to play in the discovery of new brands and products.** Television ads are one of the most impactful brand discovery channels of all, product placement in TV shows and films also prove effective.

- **Entertainment content is a great way to encourage brand advocacy.** Younger groups are the most likely to promote a brand in exchange for exclusive content, and with their online reputations being of key concern in their brand advocacy motives, many are sharing this branded content on social media too.

ENTERTAINMENT AND BRAND ADVOCACY

% who would promote a brand for access to exclusive content or services



Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q2 2017 | **Base:** 72,529 Internet Users aged 16-64

Platform: Marketing Touchpoints > Brand Discovery/Engagement > Brand Advocacy

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

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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
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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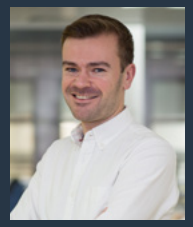

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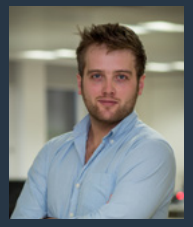

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