

GWI Device Summary

Q3 2014



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

Introduction

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

Drawing on data from our most recent wave of research, we offer insights on:

- Ownership and usage figures across all major devices
- Interest in wearable technology
- Online privacy and data protection measures
- Favored operating systems and handset brands
- 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 demographic, region and market-specific stories. In this summary version, we present some of the key trends and numbers.

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

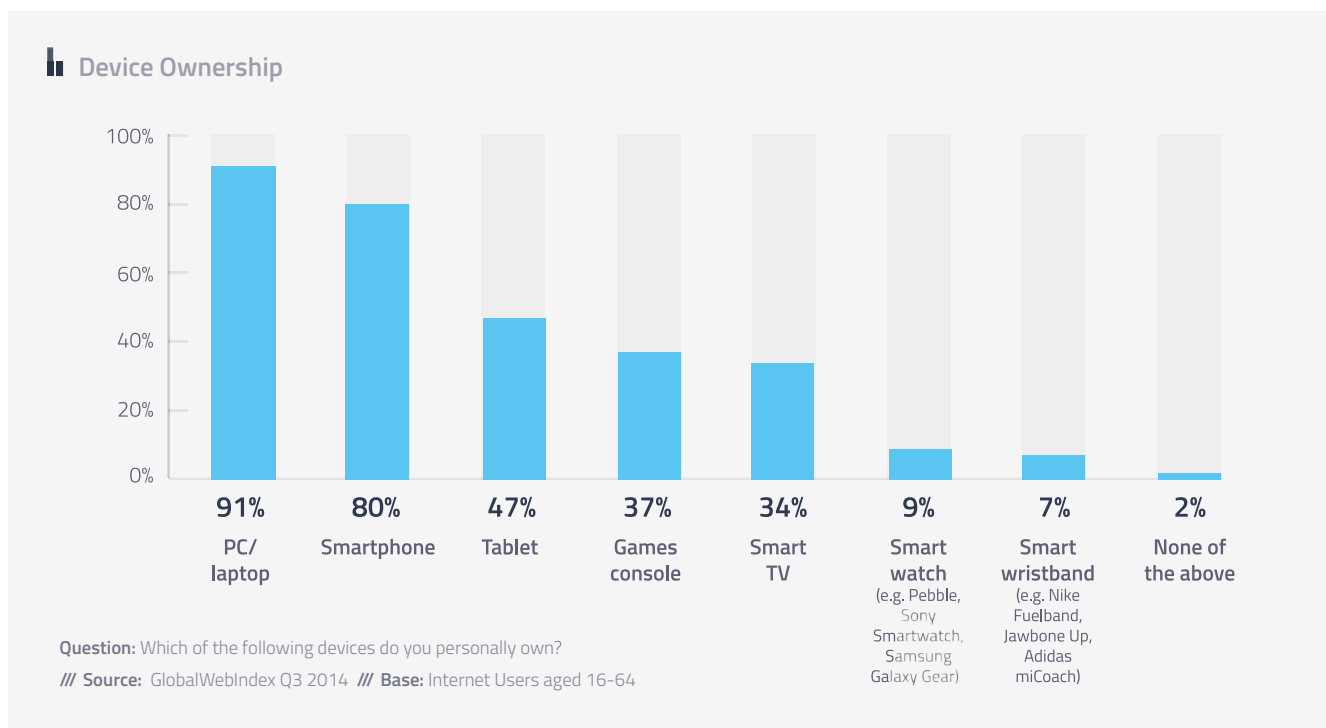
China // Hong Kong // Singapore //
India // Indonesia // Japan // Malaysia //
Vietnam // Thailand // Taiwan // South
Korea // Australia // Philippines

Research is conducted in quarterly waves, each of which has a global sample size of more than 40,000 internet users. Typically, we interview between 3,000 and 4,000 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. In this particular report, we draw primarily on our Q3 2014 wave of research among 41,823 adults.

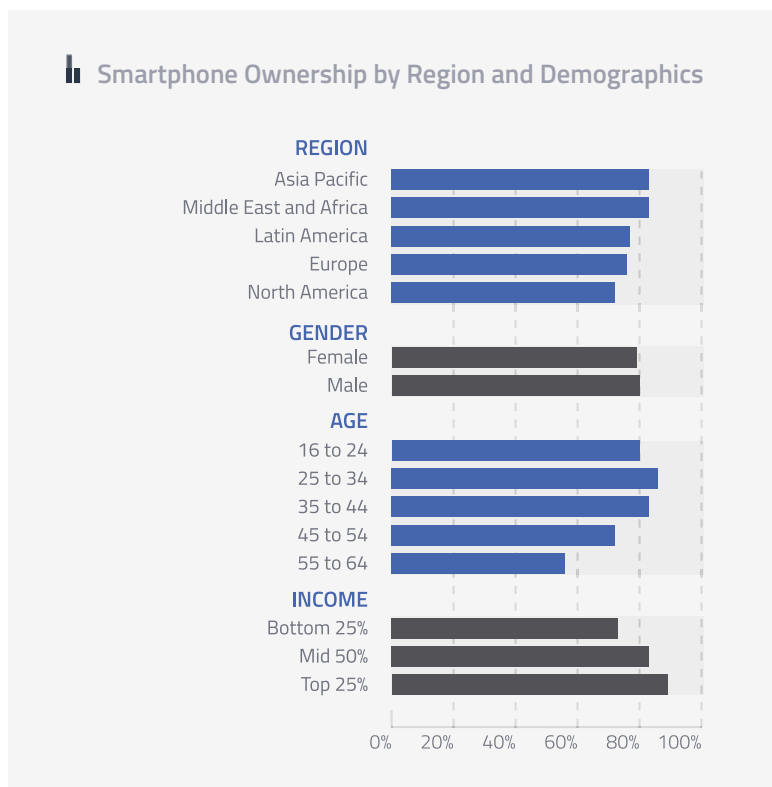
Respondents complete an **online questionnaire** that uses stratified sampling techniques to ensure that they are **representative of the internet population aged 16 to 64** in each country (with correct proportions in terms of gender, age and educational attainment).

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.

4 in 5 now own a Smartphone



Want to explore this data on the PRO Platform? Enter "Device Ownership" in the free search box, or click [Internet Landscape > Access Points > Device Ownership](#)



Question: Which of the following devices do you personally own? A 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 s5)

Source: GlobalWebIndex Q3 2014 // **Base:** Internet Users aged 16-64

- 80% of online adults now own a smartphone, while almost 50% have a tablet. For both devices, figures peak among 25-34s and the top income quartile; regionally, smartphone ownership is highest in APAC while North America tops the table for tablets.

- Almost all smartphone owners are using them to access the internet – with 75% saying they've gone online via a mobile in the last month. This is a rise from 49% back in 2011. There's a slightly bigger gap between ownership and online access for tablets, though, with just 37% going online via these devices. Nevertheless, they've seen the fastest rise of all since 2011 – having grown from 8%.

- Wearable devices are still highly niche: only 9% say they own a smart watch and just 7% report having a smart wristband. Currently, this is being driven by men, 25-34s, the top income group and consumers in APAC.



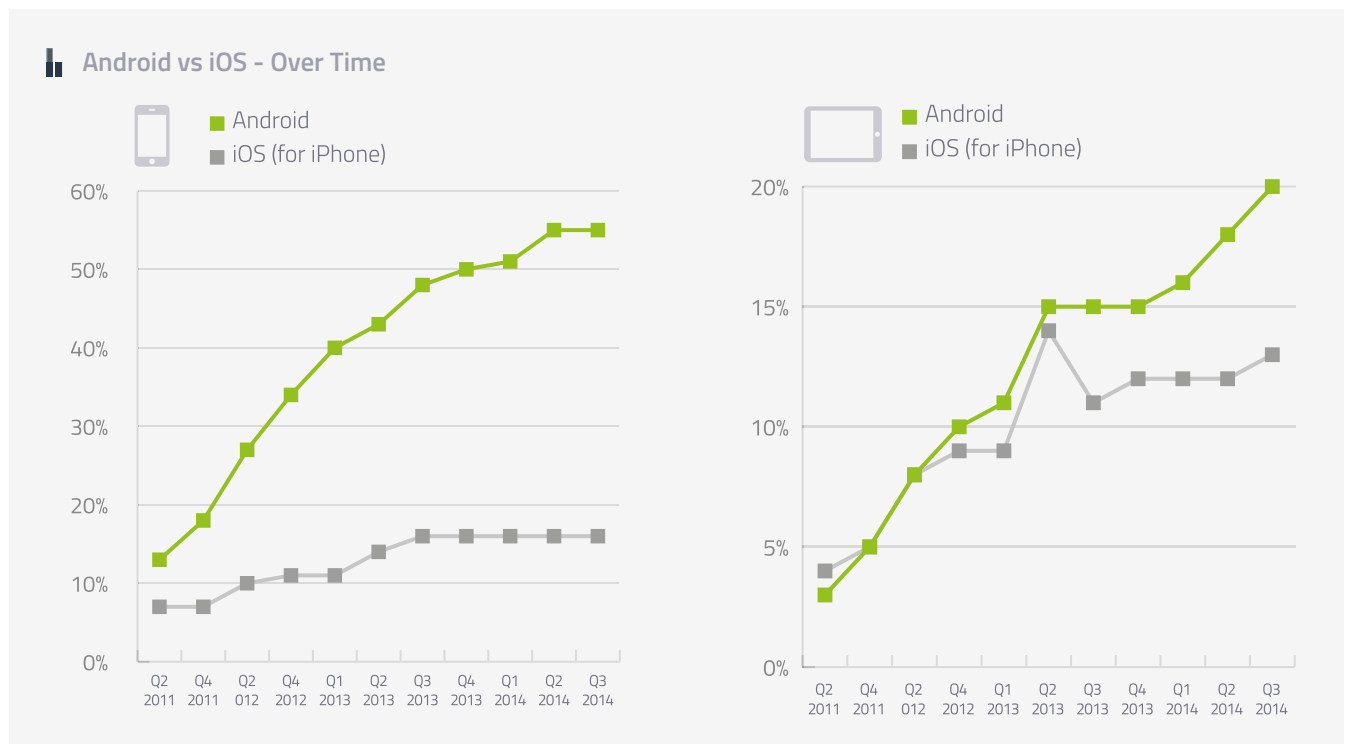
Want to explore this data on the PRO Platform? Enter "Device Ownership" in the free search box, or click [Internet Landscape > Access Points > Device Ownership](#)

Android Dominates on Mobiles and Tablets

▪ **Android is the top operating systems across both mobiles (54%) and tablets (20%);** it has a 38-point lead over second-placed iOS for iPhone and a 7-point lead over iOS for iPad. This is one of the driving forces behind **Samsung being the top mobile handset brand (34%).**

▪ That Android is in first position for mobiles is not a new development; it's enjoyed a lead over iOS in each of GWI's research waves from 2011 onwards. What has changed is the size of the gap separating the two. **Back in 2011, the ratio of Android to iOS users was just under 2:1; in 2014, it has increased significantly to approach 3.5:1.** Analyzing usage levels on a country-by-country basis reveals a key difference here: Android consistently posts its best figures in fast-growth markets. Here, there are typically 3 to 6 times as many people using Android as there are iOS – with even higher ratios in places like Argentina and Poland. **Apple enjoys its best engagement rates in a number of key, mature markets such as Australia, Japan, Canada and USA, as well as among the top income quartile.**

▪ For tablets, the last four years have seen a hugely important shift in the market; **while iOS was the top choice back in early 2011 before holding joint first position until mid 2012, Android overtook it at the end of 2012 and has never surrendered its lead since.** However, iOS does remain ahead in a handful of markets such as Australia and Canada.



Question: What operating system runs on your mobile?
What operating system runs on your tablet? // **Source:** GlobalWebIndex 2014 // **Base:** Internet Users aged 16-64



Want to explore this data on the PRO Platform? Enter "Operating Systems" in the free search box, or click **Mobile > Mobile Specifications > Mobile Operating Systems** or **Tablet > Tablet Specifications > Tablet Operating Systems**

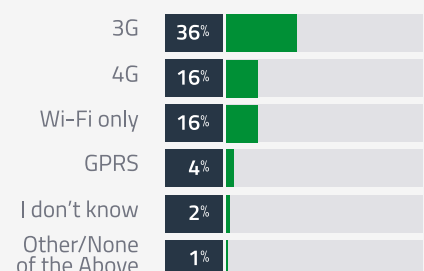
▪ **16% of online adults are currently using 4G on a mobile,** with a similar proportion saying that they typically connect via WiFi. But it's 3G which still commands by far the biggest audience (36%).

Question: When using the internet on your personal mobile phone, what type of service/connection do you use? // **Source:** GlobalWebIndex Q3 2014 // **Base:** Internet Users aged 16-64



Want to explore this data on the PRO Platform? Enter "Connection Speeds" in the free search box, or click **Mobile > Mobile Specifications > Mobile Connection Speeds**

Mobile Connection Types

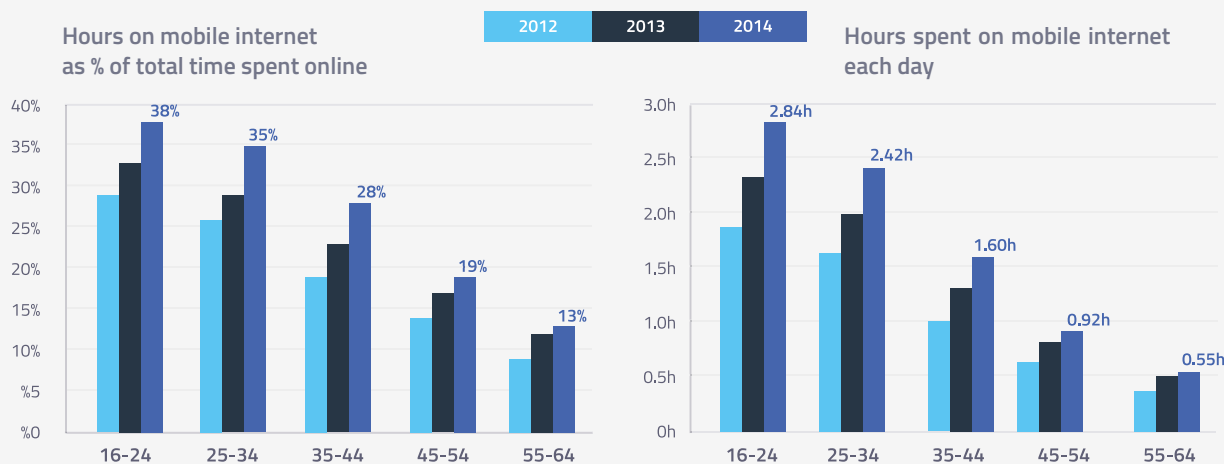


Mobile Internet used for average of 1.85 hrs/day

▪ Mobiles are grabbing a bigger and bigger share of our daily time; **on average, internet users now say they spend 1.85 hours online via a mobile each day, up from 1.24 hours in 2012.** The figures can rise much higher among certain demographics and in particular regions, though, with the daily average hitting 2.84 hours for 16-24s and 3.05 hours in the Middle East & Africa.

▪ Simultaneously, time on PCs, laptops and tablets has remained fairly steady. Despite minor fluctuations between years, there has been little change here; indeed, the figure for 2012 (4.31 hours per day) is remarkably similar to the equivalent from 2014 (4.28 hours). Clearly, then, **mobiles are not necessarily taking people away from other devices**; rather, they are encouraging people to go online for an even longer period each day. That means that the mobile internet is capturing a bigger and bigger portion of our daily time online – climbing from a 22% share in 2012 to 30% in 2014.

Time Spent Online via Mobile, by Age



Question: On a typical day, roughly how many hours do you spend on/doing the following? // **Source:** GlobalWebIndex 2012, 2013 and 2014 (averages across each year) // **Base:** Internet Users aged 16-64



Want to explore this data on the PRO Platform? Enter "Time Spent" in the free search box, or click [Media Consumption > Cross Media Consumption > Time Spent...](#)

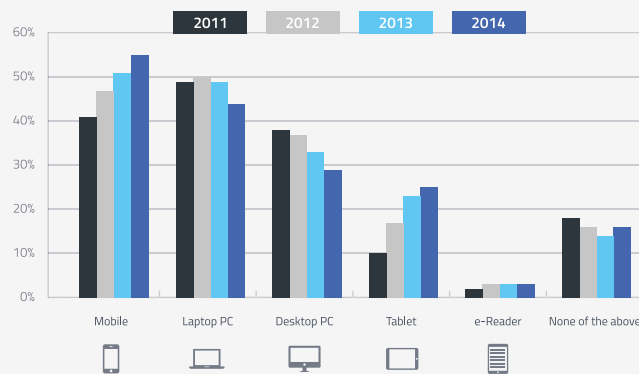
Over Half are Second-Screening via Mobile

▪ Having overtaken laptops as the top dual-screen device back in 2013, mobiles have now opened up an **eleven-point lead** (to stand at 55%); laptops remain ahead in just 10 of GWI's 32 countries.

▪ Significantly, **only 16% of online adults say they have not dual-screened while watching television** – a trend which underlines just how widespread simultaneous multi-media consumption has become.

▪ **Chatting to friends is the most popular second-screen activity** (49%), followed by reading the news (41%) and playing games (35%). **Broadly speaking, 16-24s (and 25-34s, albeit to a lesser extent) have clear leads for activities such as playing games and chatting to friends.** Behaviors such as searching for products are typically much more even, though, while 16-24s are some of the least likely to read the news or engage with emails.

Second-Screening by Device



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

// **Source:** GlobalWebIndex 2012, 2013 & 2014 (averages across each year)

// **Base:** Internet users aged 16-64



Want to explore this data on the PRO Platform? Enter "Second Screen" in the free search box, or click [Media Consumption > Second Screen Consumption.](#)



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