

GW I DEVICE SUMMARY

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



Q1 2015

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, including Apple Watch
- Online privacy and data protection measures
- Favored operating systems, handset brands and models
- The most popular apps, activities and online behaviors across devices

With our data covering 33 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, we provide the key headlines and statistics from the report. For more detailed insights, coverage and implications, please see the full version.

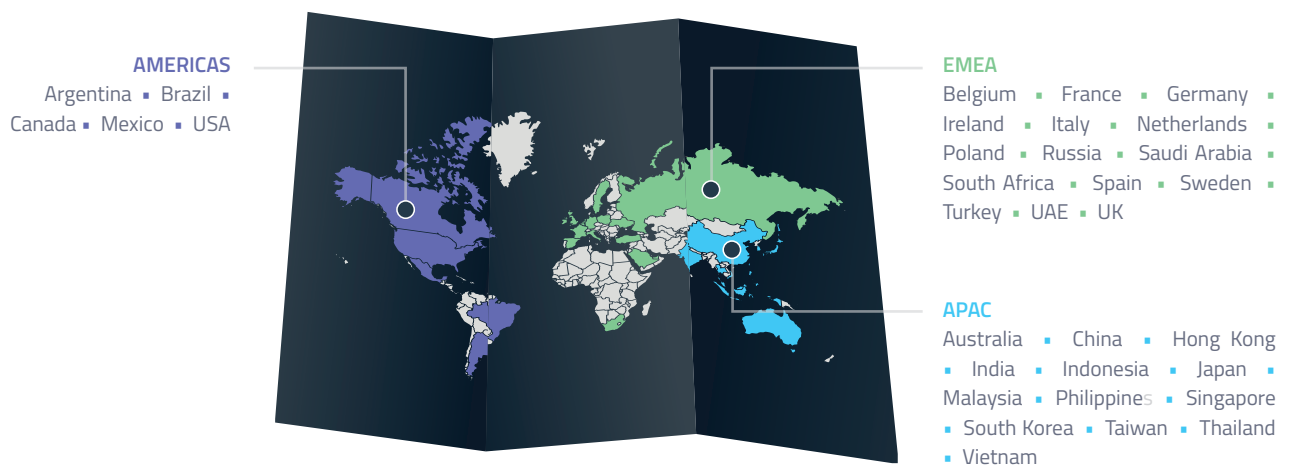
Custom Reports and Infographics

Need a market-specific look at this subject? Or want to explore these behaviors and trends for a specific audience?

GWI offers clients the chance to customize any of our reports or infographics to reflect their target audiences or priority markets. This option allows existing data to be re-cut by any of the audiences, markets, behaviors or attitudes tracked in the GlobalWebIndex survey – with final outputs featuring tailored commentary and professionally designed visuals. For more information, get in touch with the Trends team – trends@globalwebindex.net.

NOTES ON METHODOLOGY

Each year, GWI interviews more than **200,000 internet users across 33 markets** – making it the largest on-going study into the digital consumer instigated to date.



Research is conducted in quarterly waves, each of which has a global sample size of 40-50,000 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. In this particular report, we draw primarily on our Q1 2015 wave of research among 47,622 adults.

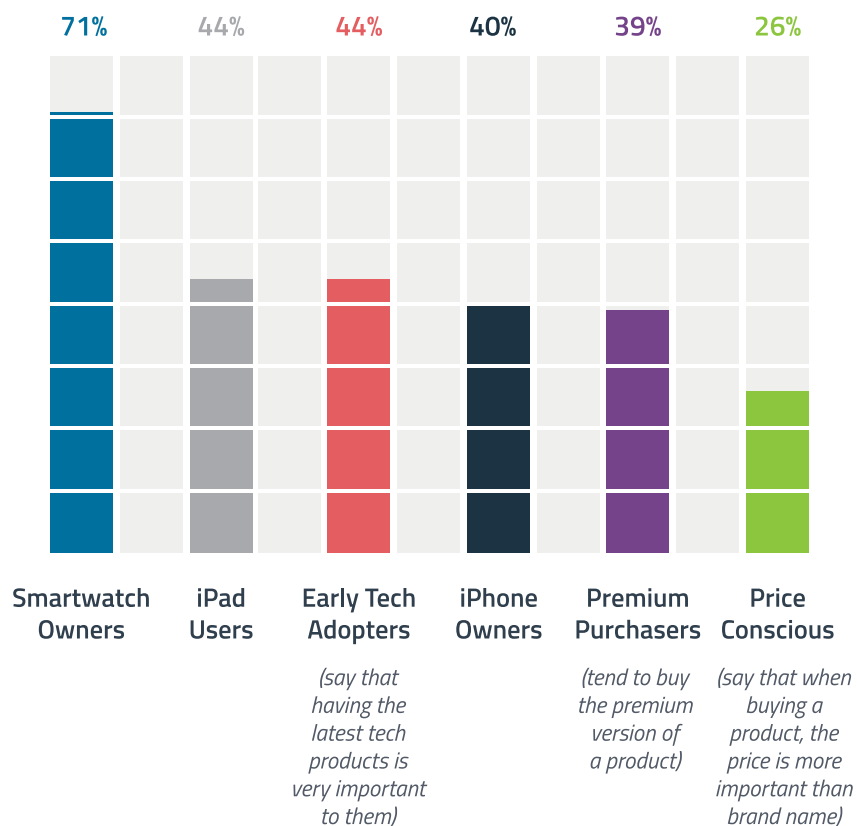
Respondents complete an **online questionnaire** that uses stratified sampling techniques to ensure that they are **representative of the internet population aged 16 to 64** in each country (with correct proportions in terms of gender, age and educational attainment).

DEVICE OWNERSHIP

- While PCs/laptops remain the most commonly owned device, **8 in 10 internet users now have a smartphone and almost half own a tablet.**
- Although Spain and Ireland post strong figures, **smartphone ownership tends to be highest in fast-growth markets.** China can boast both the highest percentage of all (87%) and the largest number of smartphone owners (400m).
- Wearable devices remain niche (1 in 10 own a smartwatch) but the introduction of the Apple Watch may change this. **1 in 4 in the UK/US say they are interested in Apple’s wearable, with figures rising as high as 70% among current smartwatch owners.**
- Three quarters of internet users are now going online via a mobile, while more than a third are connecting via a tablet.** However, there are significant segments who own a tablet, smart TV or games console who are not using them to go online.

APPLE WATCH’S FUTURE OWNERS IN THE UK/US

% who are interested in using an Apple Watch in the future



Question: Which of the following services, features or devices are you interested in using in the future? Apple Watch (% who are strongly or quite interested) // **Source:** GlobalWebIndex Q1 2015 // **Base:** 8,010 UK and 7,890 US Internet Users aged 16-64

Want to explore this data on the PRO Platform? Click here: [Internet Landscape > Interest in New Services and Devices > Using Services and Devices](#)

DEVICE USAGE TRENDS

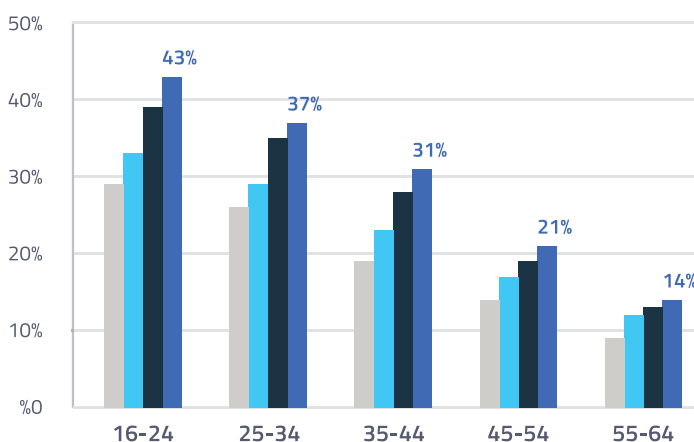
- **Internet users now spend an average of almost 2 hours daily on the mobile web.** This figure is rising sharply in some fast-growth markets, with MENA & LatAm nearing the 3.5-hour mark.
- **16-24s are at the forefront of mobile internet usage;** they spend more than 3 hours per day online via their smartphones (which equates to 43% of their total internet time). 2015 will probably see mobile web access reach parity with computers among this group.
- **Almost all internet users are second-screening, with mobile the preferred device.** Dual-screener are most likely to be chatting with friends.
- **Half of tablet users are sharing their device, as are 30% of mobile users, showing the problems inherent to tracking usage via passive analytics alone.** In particular, tablet sharing among families is widespread.
- **One 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.

TIME SPENT ONLINE BY AGE

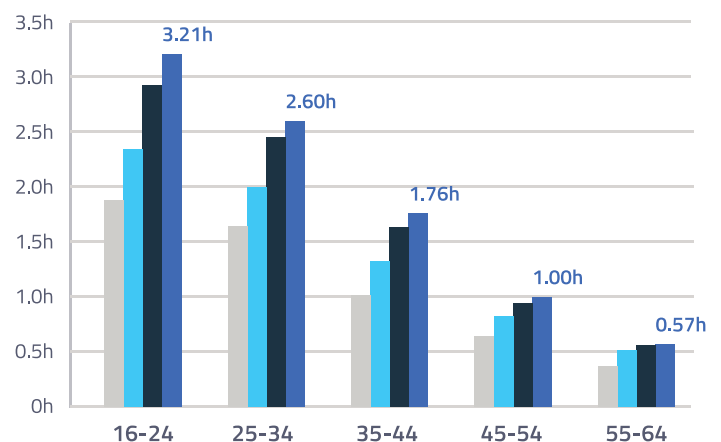
Online via Mobile



% of Total Online Time Spent on Mobile



Hours Per Day



Question: Roughly how many hours do you spend on the following on a typical day? // **Source:** GlobalWebIndex Q1 2015 // **Base:** Internet Users Aged 16-64



Want to explore this data on the PRO Platform? Click here: [Media Consumption](#) > [Cross Media Consumption](#) > [Time Spent...](#)



MOBILE AND TABLET TRENDS

- **Android remains the No.1 mobile OS in almost all countries**, yet figures are much more even with iOS in the key markets of Japan, Australia, Canada and the US.

- **Samsung is the most popular mobile handset brand but more people say they are planning to buy an iPhone than any other brand.** In China, 1 in 4 have an Apple handset, 35% plan to purchase an iPhone and 15% own a Xiaomi phone.

- **15% of iPhone owners now have a 6 handset.** North America leads but APAC posts strong figures, showing the importance of Asia to Apple. Meanwhile, 1 in 10 HTC owners use a One M8.

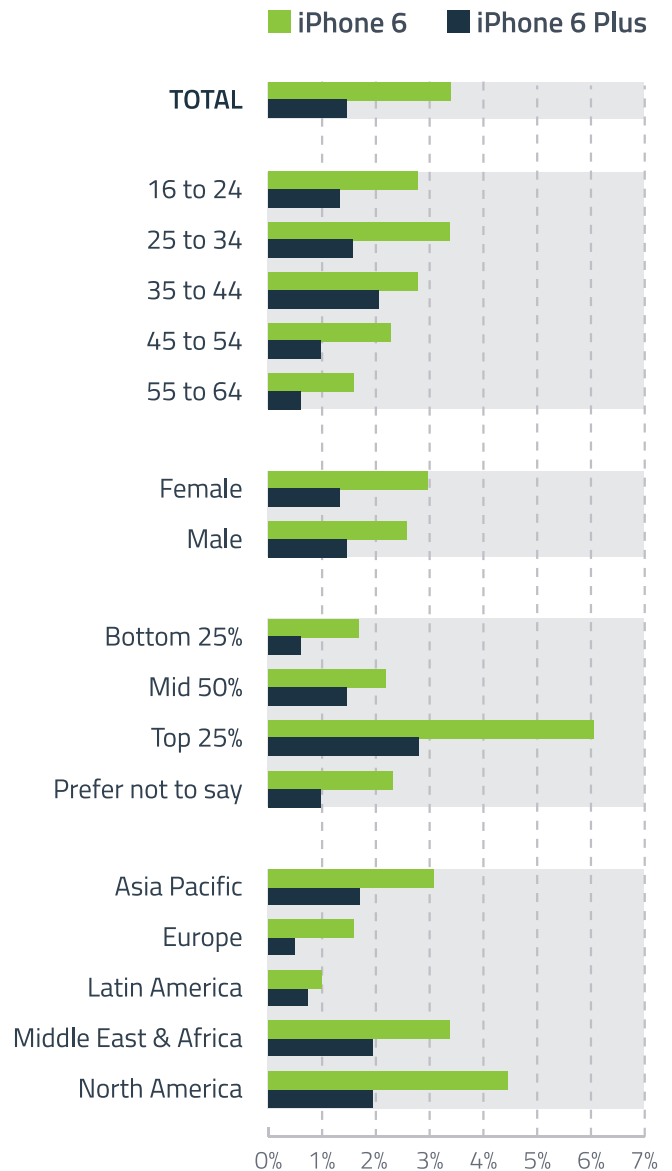
- **Rates of 4G usage are rising as 3G falls.** It's now 23% who use 4G, with figures much higher among iPhone, and especially iPhone 6, owners.

- **Android is the most favored OS when it comes to tablets**, being used by one fifth of internet users and leading iPad by 6 points.



THE DEMOGRAPHICS OF IPHONE 6 OWNERSHIP

% of internet users who own the following



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

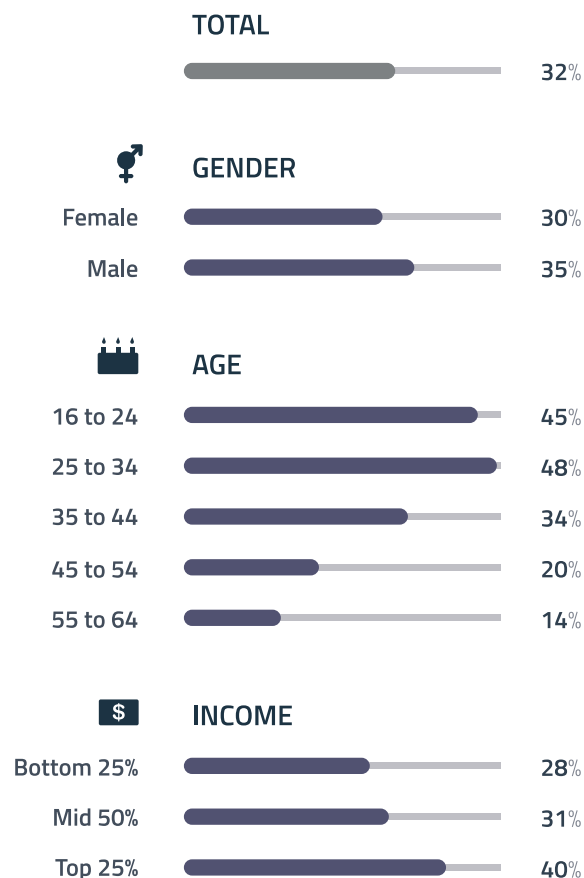
Want to explore this data on the PRO Platform? Click here: [Mobile > Mobile Model Ownership > iPhone Model Ownership](#)

APPS AND ACTIVITIES

- **By type, gaming and social networking apps are most popular** – c. 45% are using one each month.
- **In the UK/US, 1 in 3 say they are interested in using Uber** – rising to almost half among 16-34s and the top income quartile.
- **Watching a video clip is the most popular online activity:** three quarters of online adults are doing this each month. For music streaming, mobiles are becoming key devices.
- Search engines remain a major go-to point for digital consumers on all devices: 87% visited one last month.

INTEREST IN UBER IN THE UK/US

% who say they are strongly or quite interested in using Uber in the future



Question: Which of the following services, features or devices are you interested in using in the future? Uber (the mobile app that allows you to order a taxi, see the driver's name and current location and then pay without having to use cash) // **Source:** GlobalWebIndex Q1 2015 // **Base:** 8,010 UK and 7,890 US Internet Users aged 16-64



Want to explore this data on the PRO Platform? Click here: [Internet Landscape > Interest in New Services and Devices](#)





Jason Mander
Head of Trends

E jason@globalwebindex.net
🐦 [@thejasonmander](https://twitter.com/thejasonmander)



Felim McGrath
Trends Analyst

E felim@globalwebindex.net
🐦 [@felimmcgrath](https://twitter.com/felimmcgrath)

T +44 20 7731 1614 // A GlobalWebIndex, Bedford House,
69-79 Fulham High Street, London, SW6 3JW, UK

www.globalwebindex.net