globalwebindex

Device

GlobalWebIndex's **flagship report** on device ownership & usage

SUMMARY

H1 2018

www.globalwebindex.com

Introduction

Device places the spotlight on the latest ownership and usage trends across all major device categories, including smartphones, PCs/laptops, tablets, smartwatches and smart TVs. Among others, this report covers the following topics in detail:

- Which devices are the most widely owned and used.
- How ownership of different devices varies across different groups.
- How much time is being spent on mobiles and PCs/laptops and how this varies by age and region.
- Which devices consumers consider to be their most important access point, and the behaviors that are most likely to be taking place on mobile or PC/laptop.
- Current engagement with smart home devices and how this is set to grow.
- Which brands are winning in the smartphone marketplace.

In this report summary, we highlight key insights and figures from our research. The full version of our report includes additional sections and market-by-market statistics.

Device Ownership

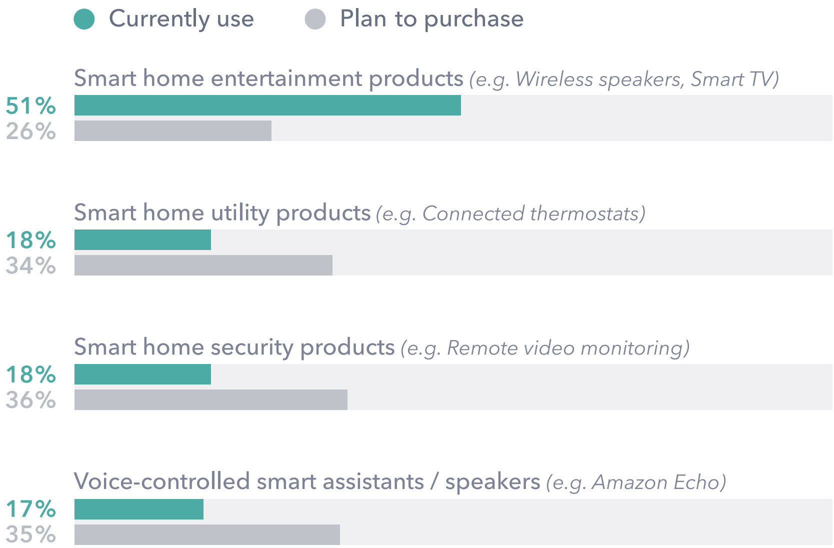
What devices are internet users most likely to own and how does this vary by region and age?

Key Headlines

- **There isn't device favoritism among consumers.** The average digital consumer has 3 different devices, using each for different purposes at different times.
- Smartphones have transformed online behaviors. **94% of internet users have a smartphone, up 16 percentage-points since the start of 2015.** There are now no regions where PCs/laptops retain a lead over smartphones.
- **The proportion with a PC/laptop continues to fall but three-quarters still have one.** Europe and North America are especially keen on PCs.
- Although less than a fifth have invested in smart assistants, smart utility and smart security products, there's a fair proportion who are set to be in the market for them. **For smart assistants, there could be soon be half of consumers worldwide engaging with these devices.**
- **Ownership of tablets and e-readers has dipped over the past two years.** The tablet audience should not be forgotten though - about 40% have one, with the top income group (51%) and parents (43%) strong adopters.

SMART HOME DEVICE OWNERSHIP

% of internet users who…



Question: Which of these products do you currently use at home? And which are you or your household planning to purchase in the next 6 months?
Source: GlobalWebIndex Q4 2017
Base: 80,267 Internet Users aged 16-64

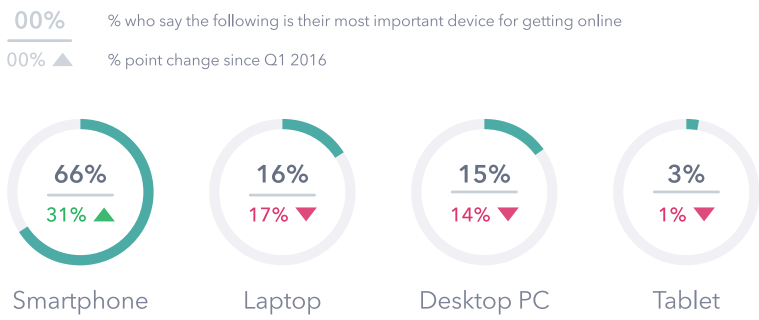
Device Usage Trends

To what extent and for what reasons are digital consumers using the devices they own?

Key Headlines

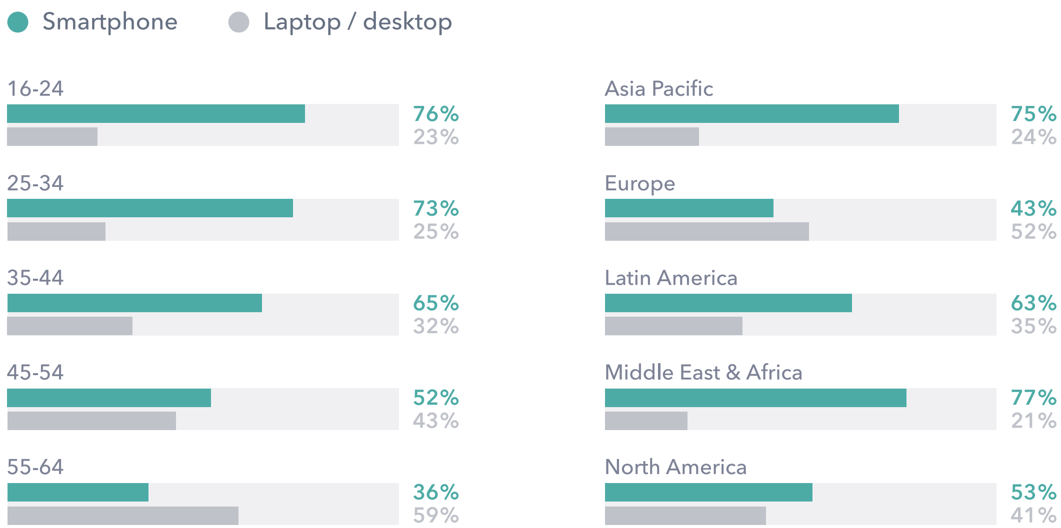
- **Two-thirds say their smartphone is their most important internet device** and 31 of the 34 online activities we track are now mobile-first.
- A mobile-only strategy may mean missing out on a large selection of consumers: **the average internet user spends 3 hours 40 minutes a day on their PCs/laptops.** They remain a considerable force for older consumers.
- Using mobile voice search is becoming more widespread. **Over our last two waves of research alone, we've seen the numbers using voice increase from 23% to 27%.** 16-24s and those in APAC are the most likely to be engaging with voice.
- **There are now no online behaviors where Tablet Users are more likely to turn to their tablets than their mobiles.** That said, there's evidence that these devices still serve a purpose for watching TV and browsing the web, when a mobile screen is not large enough.

DEVICE IMPORTANCE



SMARTPHONE VS PCS

% who say their smartphone / PC is their most important device for getting online



Question: Which would you say is the most important device you use to access the internet, whether at home or elsewhere?
Source: GlobalWebIndex Q4 2017
Base: 97,316 Internet Users aged 16-64

The Mobile Marketplace

Which handset brands are dominating the mobile market?

Key Headlines

- **30% of internet users plan to upgrade or buy a new phone within the next 6 months**. Fast-growing markets and regions hold the key to renewed smartphone sales, where online populations are growing rapidly.

- **North America and Europe have slow upgrade cycles.** Only about 45% plan to purchase a new phone in the next year.

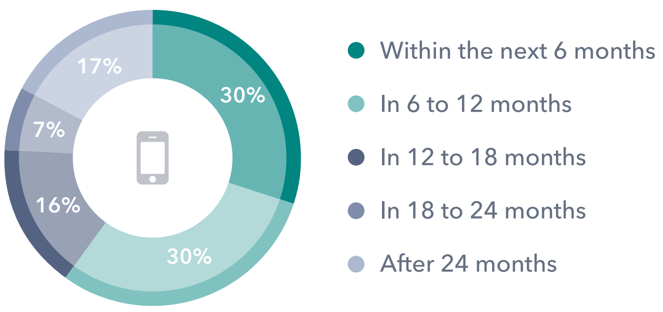
- **Samsung is still the most popular handset brand, but Apple has made some real headway.** As recently as Q1 2015, Samsung had a relatively firm hold on the market: 33% had a Samsung vs. 19% who had an iPhone. Now, this difference is only two percentage-points.

- Although still relatively new on the market, **just a minority of iPhone Owners have upgraded to the 8 model (2.5%).** The X model has managed to outpace the 8, showing the amount of excitement that Apple created around its 10-year anniversary model.

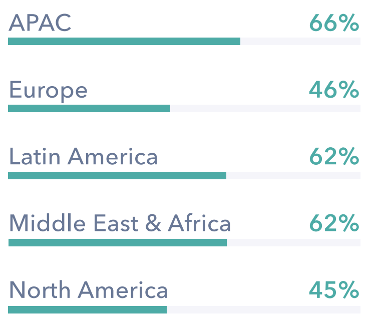
- **Chinese brands like Huawei and Xiaomi have increased their global market share recently.** It's impressive that 11% globally have a Huawei phone, and about a fifth would consider getting one.

MOBILE PURCHASE TIMEFRAME

% who say they plan to buy a new mobile phone or upgrade their existing phone…



% who plan to buy a new mobile phone or upgrade within the next 12 months



Questions: When do you plan to buy a new mobile phone or upgrade your existing phone?
Source: GlobalWebIndex Q4 2017
Base: 89,029 Internet Users aged 16-64

Notes on Methodology

INTRODUCTION

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 populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex 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 GlobalWebIndex 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 GlobalWebIndex'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.

Notes on Methodology

INTERNET PENETRATION RATES ACROSS GLOBALWEBINDEX'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.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2018. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

INTERNET PENETRATION RATES (GLOBALWEBINDEX'S FORECASTS FOR 2018 BASED ON 2016 ITU DATA)

Table below refers to the total population in each market

Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.3%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%

INTERNET PENETRATION RATES: GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Notes on Methodology

SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2017 wave of research across 42 countries, which had a global sample size of 97,317 (with 80,267 surveys completed on PC/laptop/tablet and 17,050 surveys completed on mobile). The sample by market breaks down as follows:

Market	GWI Sample
Argentina	1,590
Australia	1,261
Austria	1,285
Belgium	1,260
Brazil	2,250
Canada	2,440
China	13,616
Egypt	1,290
France	2,260
Germany	2,262
Ghana	750
Hong Kong	1,253
India	3,090
Indonesia	1,757

Market	GWI Sample
Ireland	1,316
Italy	2,251
Japan	1,751
Kenya	750
Malaysia	1,513
Mexico	1,560
Morocco	750
Netherlands	1,259
New Zealand	1,266
Nigeria	750
Philippines	1,508
Poland	1,255
Portugal	1,270
Russia	2,309

Market	GWI Sample
Saudi Arabia	1,251
Singapore	1,519
South Africa	1,541
South Korea	1,251
Spain	2,254
Sweden	1,311
Switzerland	1,259
Taiwan	1,254
Thailand	1,618
Turkey	1,750
UAE	1,285
UK	7,815
United States	15,780
Vietnam	1,557

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OUR PLATFORM

The questions and data-points featured in this report are available to explore on our Platform. They can be analyzed by any audience, data 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

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GWIQ

GWIQ offers clients the ability to create bespoke audiences on the platform by connecting the GlobalWebIndex 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.

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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:

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Brand Health
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Brand Profiling

PRODUCT SOLUTIONS
Usages and Attitudes
Price Point
Platform Testing
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CAMPAIGN & AUDIENCE SOLUTIONS
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