# Digital vs. Traditional Media Consumption

Analyzing time devoted to online and traditional forms of media at a global level, as well as by age and across countries

INSIGHT REPORT SUMMARY | Q1 2017

## INTRODUCTION

The shift from traditional to digital media is much discussed but rarely quantified. In this report, GlobalWebIndex offers a unique perspective on day-to-day media consumption behaviors by age and across 34 markets – analyzing how much time people are spending online, tracking the types of media they are consuming and assessing the share of time spent on digital vs traditional forms of television, radio and print press.

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



**INSIGHT REPORT SUMMARY | Q1 2017**

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## DEFINITIONS

In this report, we draw on our cross-media consumption questions which ask internet users to estimate how much daily time they typically devote to the following activities:

**INTERNET USAGE**
Via PC/laptop/tablet
Via Mobile

**TELEVISION**
Linear
Online

**RADIO**
Traditional/Broadcast
Online

**PRESS**
Traditional Print Press/News
Online Press/News

**SOCIAL NETWORKS / SERVICES**

**GAMES CONSOLES**

As a result, all figures referring to time spent on these activities is based upon self-reported estimates and the following definitions:

**LINEAR TV**
Television that is traditionally broadcast and watched in real-time.

**ONLINE TV**
Television that is streamed online or watched on-demand. This includes usage of catch-up services like BBC iPlayer and TV streaming services like Netflix.

**BROADCAST RADIO**
Radio channels that are traditionally aired and listened to in real-time.

**ONLINE RADIO**
Radio channels that are listened to online, typically via streaming.

**TRADITIONAL PRINT PRESS**
Physical, printed forms of press e.g. newspapers and magazines.

**ONLINE PRESS**
Press or news stories that are read online e.g. via news websites or apps.

We use this data to create average amounts of time spent on each activity per day in 2012, 2013, 2014, 2015 and 2016. To do this, we assign a number of minutes to each period of time (as shown below), multiply this by the relevant universe figure and then calculate the average. This generates easily comparable data which enables us to estimate total time spent across markets or consumer segments.

| | | |
|---|---|---|
| Less than 30 minutes | > | 0.25 hours |
| 30 mins to 1 hour | > | 0.75 hours |
| 1 to 2 hours | > | 1.5 hours |
| 2 to 3 hours | > | 2.5 hours |
| 3 to 4 hours | > | 3.5 hours |
| 4 to 6 hours | > | 5 hours |
| 6 to 10 hours | > | 8 hours |
| More than 10 hours | > | 10 hours |
| Do not use | > | 0 hours |

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

## SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q1, Q2 & Q3 2016 waves of research across 34 countries, which had a total global sample size of 153,501. It also uses data from GWI's waves of research in 2012, 2013, 2014 and 2015. The sample by market breaks down as follows:

| | 2016 | 2015 | 2014 | 2013 | 2012 |
|---|---|---|---|---|---|
| Argentina | 2266 | 3047 | 3058 | 3065 | 1519 |
| Australia | 2257 | 3124 | 3010 | 3024 | 1559 |
| Belgium* | 2378 | 3024 | n/a | n/a | n/a |
| Brazil | 3010 | 4051 | 4022 | 4023 | 2042 |
| Canada | 4508 | 4538 | 4003 | 4049 | 2214 |
| China | 15281 | 13892 | 8082 | 8050 | 4119 |
| France | 6007 | 8060 | 4024 | 4088 | 2018 |
| Germany | 6065 | 8119 | 4034 | 4110 | 2006 |
| Hong Kong | 2262 | 3145 | 3106 | 3028 | 1517 |
| India | 3805 | 5290 | 5012 | 5013 | 2730 |
| Indonesia | 2275 | 3113 | 3008 | 3121 | 1549 |
| Ireland** | 3032 | 4027 | 4106 | 2020 | n/a |
| Italy | 6027 | 8091 | 4078 | 4085 | 2001 |
| Japan | 2500 | 3043 | 3031 | 3558 | 1516 |
| Malaysia | 2277 | 3051 | 3009 | 3021 | 1532 |
| Mexico | 2356 | 3135 | 3017 | 3019 | 1524 |
| Netherlands | 2310 | 3045 | 3022 | 3036 | 1534 |

| | 2016 | 2015 | 2014 | 2013 | 2012 |
|---|---|---|---|---|---|
| Philippines | 2304 | 3165 | 3015 | 3025 | 1542 |
| Poland | 2266 | 3048 | 3096 | 3287 | 1558 |
| Portugal* | 2273 | 2309 | n/a | n/a | n/a |
| Russia | 3858 | 5118 | 5497 | 5491 | 2588 |
| Saudi Arabia | 2260 | 3112 | 3041 | 3012 | 1507 |
| Singapore | 2250 | 3102 | 3002 | 3094 | 1526 |
| South Africa | 2273 | 3095 | 3005 | 3053 | 1613 |
| South Korea | 2270 | 3057 | 3031 | 3150 | 1658 |
| Spain | 6030 | 8092 | 4165 | 4081 | 2015 |
| Sweden | 2266 | 3107 | 3035 | 3169 | 1511 |
| Taiwan | 2278 | 3063 | 3020 | 3109 | 1615 |
| Thailand | 2302 | 3085 | 3062 | 3200 | 1569 |
| Turkey | 2316 | 3128 | 3070 | 3196 | 1673 |
| UAE | 2305 | 3046 | 3036 | 3028 | 1500 |
| UK | 22759 | 30604 | 30098 | 24864 | 4060 |
| USA | 22579 | 30734 | 30215 | 24751 | 4351 |
| Vietnam | 2296 | 3074 | 3036 | 3056 | 1530 |

**GlobalWebIndex began research in Portugal and Belgium in 2015*

***GlobalWebIndex began research in Ireland in 2013*

# Global Trends in Media Consumption

## KEY FIGURES

- On a typical day, **internet users now estimate that they spend almost 6 ½ hours online.** Smartphones are becoming ever more prominent within this: since 2012, daily time spent online on mobiles has jumped from 1 hour 17 minutes to 2 hours 30 minutes. Significantly, the share of internet time captured by smartphones has risen from 23% to 39%.

- Over the same period, **PCs/laptops have seen small declines** but they continue to retain an important role even as mobiles continue to climb. It's clear that smartphones are simply encouraging us to spend longer periods of time online each day, rather than do so at the direct expense of traditional devices.

- **Online TV has seen small and consistent increases** and is now capturing almost an hour of time each day. Consumers are still spending over twice as long watching broadcast TV (2 hours 5 minutes) though, highlighting that traditional formats are still holding their own.

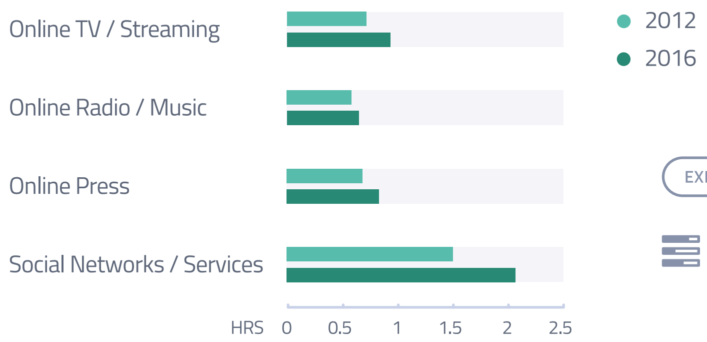
- **Social networks/services capture the largest share of online media time (32%).** Over 2 hours per day is being spent on social networks/ services – 34 minutes more than was being spent back in 2012.

- **Simultaneous multi-media consumption is now the norm:** over 85% are using another device as they watch television. Mobiles are the chosen device for this, with social networking and chatting to friends the top activities.



### ONLINE MEDIA CONSUMPTION BEHAVIORS: 2012 vs 2016

*Number of hours and minutes per day typically devoted to the following*



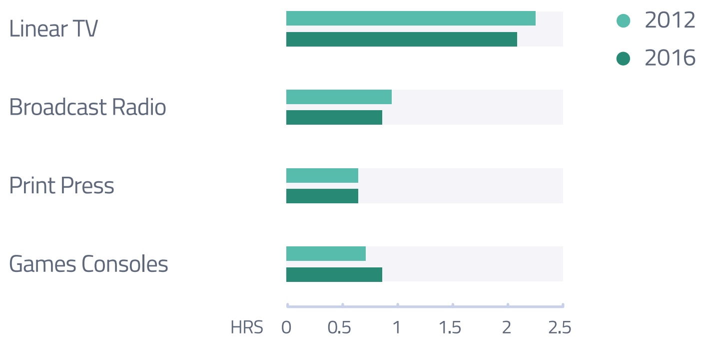

EXPLORE THE DATA

**Question:** Roughly how many hours do you spend on/doing the following each day? **Source:** GlobalWebIndex 2012 & 2016 (averages across all waves of research conducted in each year)
**Base:** Internet Users aged 16-64

**PRO Platform:**
Media Consumption >
Time Spent Watching Online TV

### OFFLINE MEDIA CONSUMPTIONS BEHAVIORS: 2012 vs 2016

*Number of hours and minutes per day typically devoted to the following*



# Media Consumption by Age



## KEY FIGURES

▪ **16-24s are clocking up the most time online each day,** spending 2 ½ hours longer online than their 55-64-year-old counterparts. This is largely down to this age group spending the most time online on their mobiles – a considerable 3 hours and 15 minutes each day.

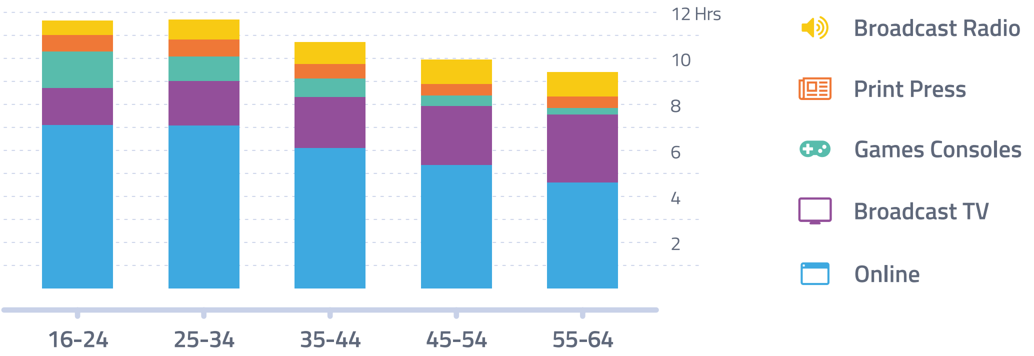
▪ **Mobiles now represent 46% of all online time for the youngest age group,** whereas they capture just a fifth for the oldest bracket.

▪ For TV, it's 16-24s who are at the forefront of the shift online; watching more than an hour per day, online TV/streaming has become a key part of their daily TV consumption. In contrast, 16-24s are spending the smallest amount of time on both linear TV and broadcast radio – with engagement with both increasing in line with age.

▪ **All online media activities have seen consistent cross-age increases,** with particularly substantial rises seen for social networks/services. 55-64s have seen the smallest increases, but even for this group, they're still spending around 20 minutes longer on these services than they were back in 2012.

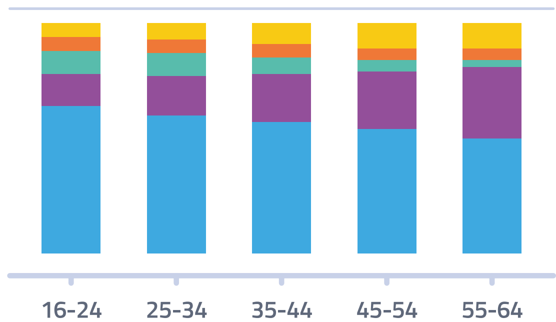
### MEDIA CONSUMPTION BEHAVIORS BY AGE

*Number of hours and minutes per day typically devoted to the following*




*Share of Total Media Time*

| | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 |
|---|---|---|---|---|---|
| Online | 64% | 60% | 57% | 54% | 49% |
| Linear TV | 14% | 16% | 21% | 26% | 31% |
| Games Consoles | 10% | 9% | 7% | 5% | 3% |
| Print Press | 6% | 6% | 6% | 5% | 5% |
| Broadcast Radio | 6% | 7% | 9% | 11% | 11% |




EXPLORE THE DATA

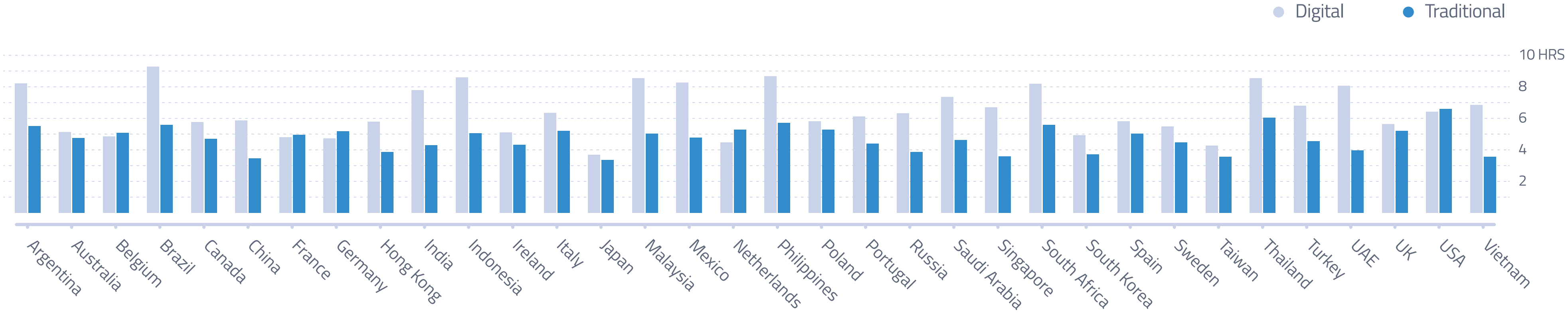
**Question:** Roughly how many hours do you spend on/doing the following each day? **Source:** GlobalWebIndex Q1-Q3 2016 **Base:** Internet Users aged 16-64

**PRO Platform:** Media Consumption > Time Online on Mobile

# National Differences in Media Consumption

**DIGITAL vs TRADITIONAL MEDIA BY MARKET**

*Number of hours and minutes per day typically devoted to the following*




## KEY FIGURES

▪ **There are just 5 of the 34 markets tracked by GWI where consumers are spending longer each day on traditional rather than digital forms of media.** In the USA, the enduring popularity of linear TV is the main contributor, while in a clutch of Western European markets (Belgium, France, the Netherlands and Germany), the relative lack of enthusiasm for social networking is having a role.

▪ **Daily time spent online on mobiles is much higher in fast-growth markets** (where online populations tend to have younger age profiles). Mobiles are now capturing 40-50% of online time in most fast-grown markets, while the equivalent figure dips down to 25% or below in places like France and Belgium.

▪ Of the specific offline media activities, **across every single market it's linear TV which is capturing the biggest share of media time each day.** The US stands out here – where internet users are spending over half an hour longer than second-placed France.

▪ **There are now 7 markets where people are watching online TV for an average of more than 1 hour per day.** Fast-growth nations in APAC and the Middle East are at the forefront here, though it's interesting that the US takes second place overall – a clear reflection of the US being the biggest user of services like Netflix.

EXPLORE THE DATA

**Question:** Roughly how many hours do you spend on/doing the following each day? **Source:** GlobalWebIndex 2012-2016 (averages across all waves of research conducted in each year) **Base:** Internet Users aged 16-64

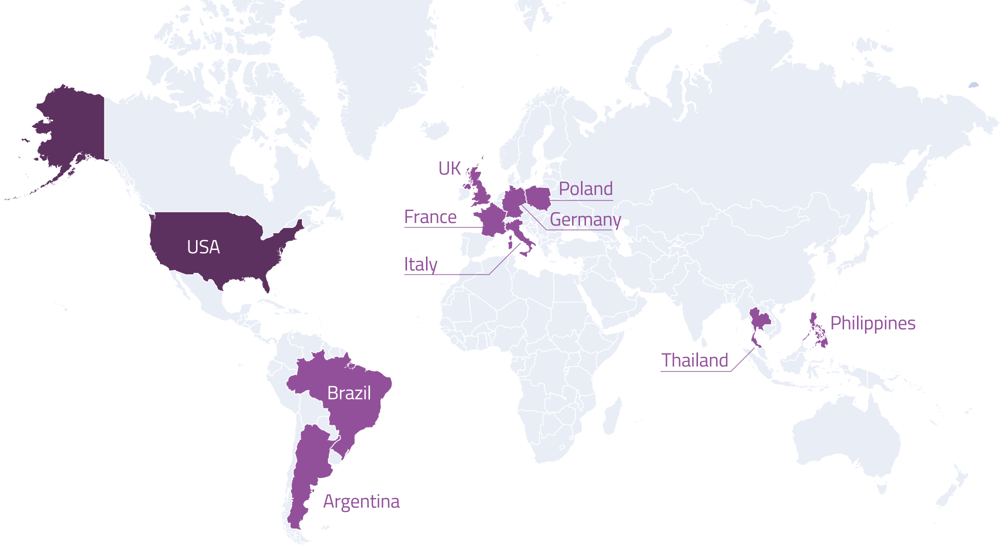
**PRO Platform:**
Media Consumption >
Time Spent Watching Linear TV

# Traditional vs Digital: TV, Radio and Press

## TV: LINEAR vs ONLINE

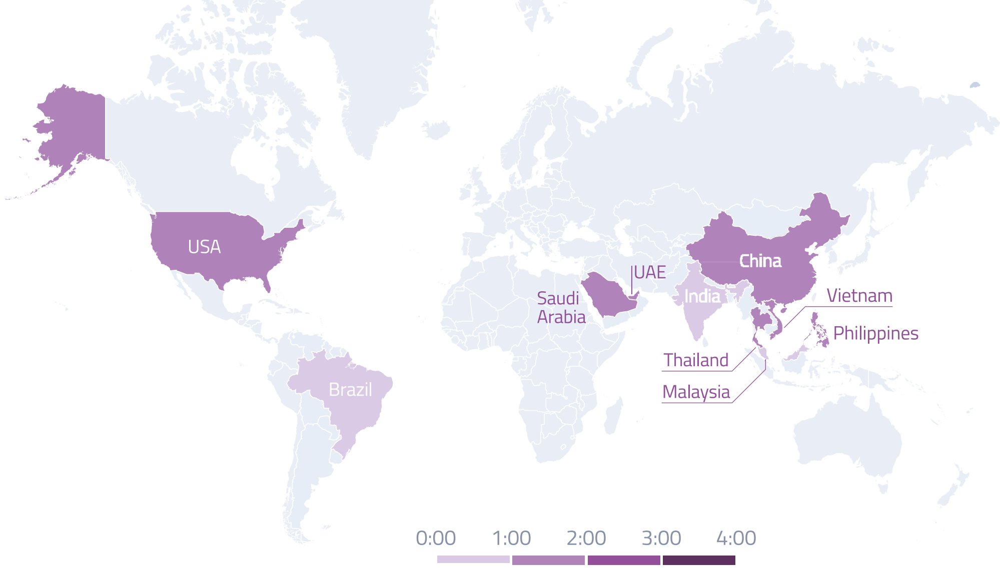
### TOP 10 WATCHERS OF LINEAR TV

*Number of hours and minutes typically spent watching linear TV each day*




### TOP 10 WATCHERS OF ONLINE TV / STREAMING

*Number of hours and minutes typically spent watching online TV each day*






### KEY FIGURES

▪ Across 31 markets where trended data from 2012 onwards is available, **daily time spent on linear TV has declined in 29 of them, broadcast radio is down in 24 countries and physical print press has dipped in 15 of them.** Meanwhile, online TV has recorded increases in 28 of 31 countries and online press has risen in 26 places.

▪ **Traditional forms of media are not being abandoned,** though. Despite constant claims that the internet is taking people away from other formats, most of them are holding their own. Linear TV remains ahead of online TV in all 34 markets and represents the single biggest daily media activities. It's for press that we see a different picture: here, online is ahead of print editions in all but two markets.

EXPLORE THE DATA

**Question:** Roughly how many hours do you spend watching television/online forms of televison during a typical day? **Source:** GlobalWebIndex Q1-Q3 2016 **Base:** Internet Users aged 16-64

**PRO Platform:** Media Consumption > Time Spent Watching Online TV

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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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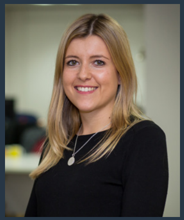
Jason Mander

**Chief Research Officer**

E jason@globalwebindex.net

@thejasonmander


Katie Young

**Senior Trends Analyst**

E katie@globalwebindex.net

@katie_young11



**www.globalwebindex.net**

T + 44 207 731 1614 /// E hello@globalwebindex.net

/// A 3 Dorset Rise, London, EC4Y 8EN, UK