

INTRODUCTION

The shift from traditional to digital media is much discussed but rarely quantified. In the full version of this report, GlobalWebIndex thus offers a unique perspective on day-to-day media consumption behaviors – 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, we provide some of the key headlines and figures.



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.

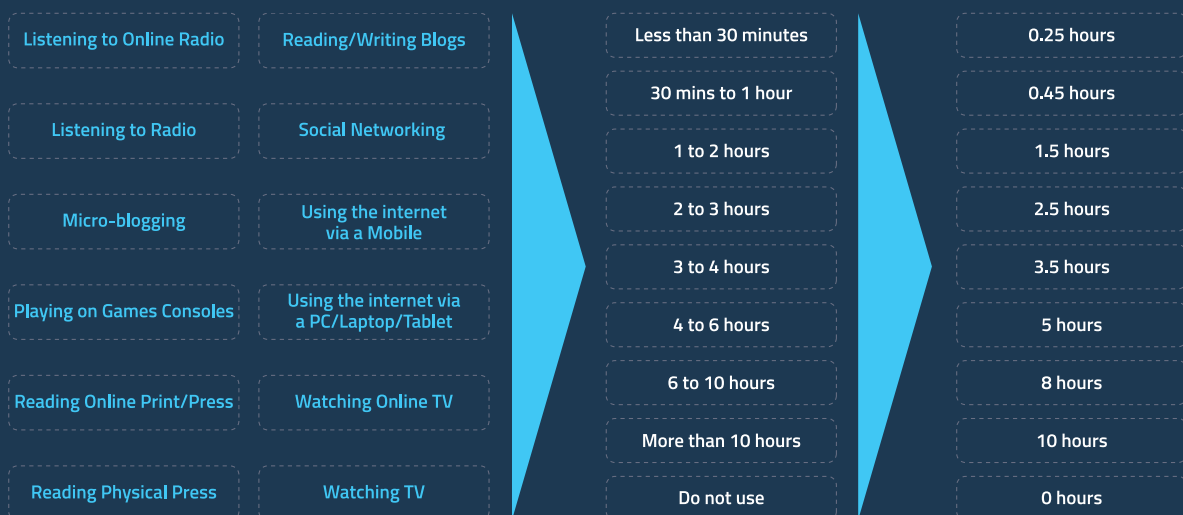


Research is conducted in quarterly waves, each of which has a **global sample size of more than 40,000 internet users**. In each country, we typically interview between 3,000 and 4,000 people per year, with a larger sample size in key markets such as the UK and the US (30,000 each). Data is collected in the last six weeks of every quarter, ensuring it is as up-to-date as possible.

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).

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 activities shown below.

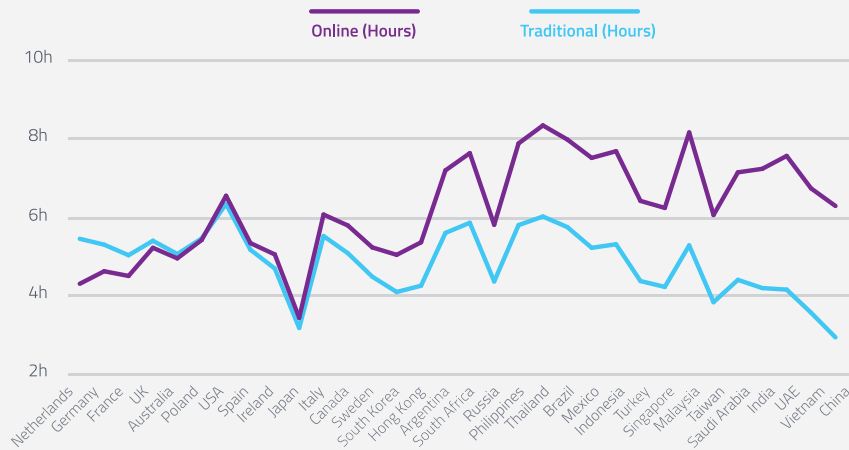
We use this data to create average amounts of time spent on each activity per day in 2012, 2013 and 2014. To do this, we assign a number of minutes to each period of time (as shown below), multiply this by the relevant number of respondents and then calculate the average. This generates easily comparable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



Online Media Ahead of Traditional in Majority of Markets

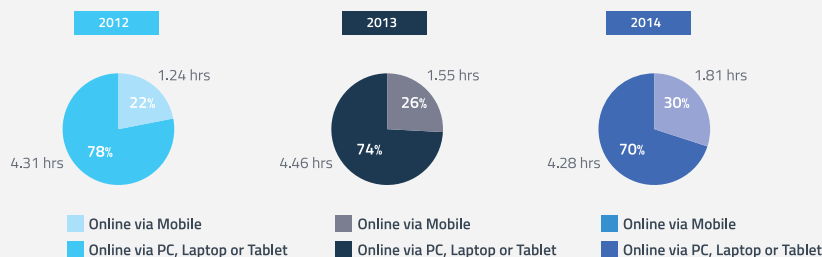
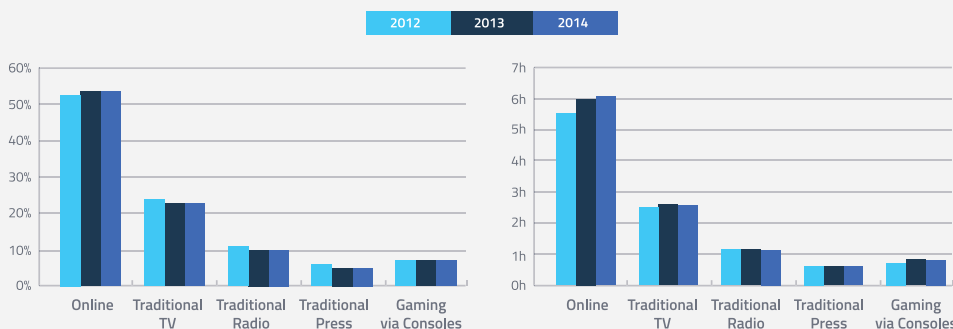
- In 26 of GWI's 32 countries, **people are spending more time each day on online rather than traditional forms of media.** The only places where traditional still leads are the UK, Australia, Poland, Germany, the Netherlands and France – but even here, the ratios are close.
- Globally, **internet users now spend a daily average of 6.09 hours on online media,** up from 5.55 hours in 2012. Online populations in Thailand, Malaysia and Brazil are the most digitally oriented of all, typically consuming 8 hours or more. This reflects a general trend of internet users in fast-growth markets typically spending the most time online.
- There is **huge variation between countries in terms of the total daily time spent on media (both offline and online)** – from a high of 14 hours in Thailand to just 7 in Japan.

TIME SPENT ON ONLINE VS TRADITIONAL MEDIA, BY MARKET



Question: On a typical day, roughly how many hours do you spend online via the following devices? // **Source:** GlobalWebIndex Q1 - Q2 2014 // **Base:** Internet users aged 16-64

DAILY CONSUMPTION OF MEDIA - CHANGES OVER TIME

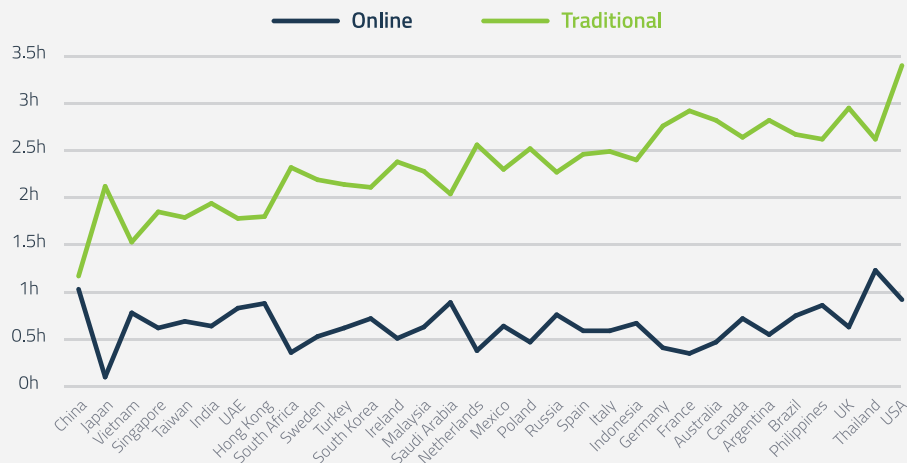


Question: On a typical day, roughly how many hours do you spend on/doing the following? // **Source:** GlobalWebIndex Q4 2012 - Q2 2014 // **Base:** Internet users aged 16-64

USA Leads for Traditional TV, China for Online TV

- **Watching traditional TV remains the single biggest media activity** – accounting for an average of 2.58 hours per day (a 23% share of total time spent on media). However, online TV is enjoying consistent rises; by 2014, people were watching an average of 0.7 hours per day (a 6% share).
- **The USA remains the biggest television market in the world, with internet users typically watching 4.33 hours per day.** Those in China watch the least television overall (2.20 hours), but are the second biggest consumers of *online* TV (1.03 hours).
- **Online viewing accounts for 33% of the total time that 16-24s devote to television.** Among 55-64s, the equivalent figure is just 7%.
- **Print Press is the most digitized form of media;** internet users in the majority of countries surveyed now typically spend longer on online rather than physical print press.

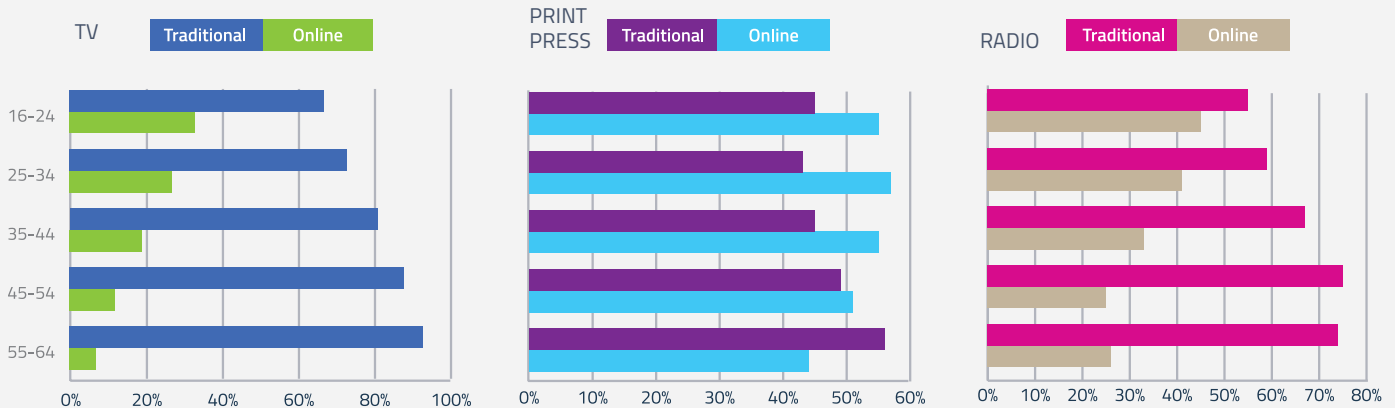
TV: TRADITIONAL VS ONLINE, BY MARKET



Question: On a typical day, roughly how many hours do you spend on/doing the following?
 /// Source: GlobalWebIndex Q4 2012 - Q2 2014 /// Base: Internet users aged 16-64

TRADITIONAL VS ONLINE CONSUMPTION, BY AGE

2014: Online vs Traditional

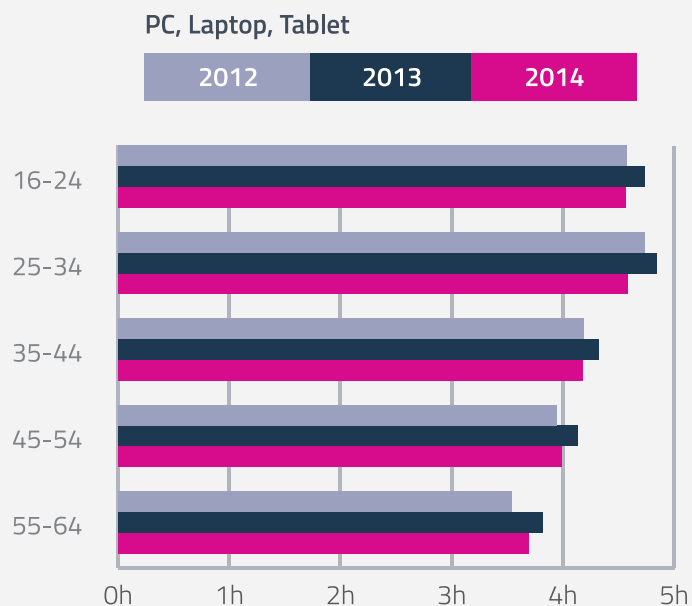
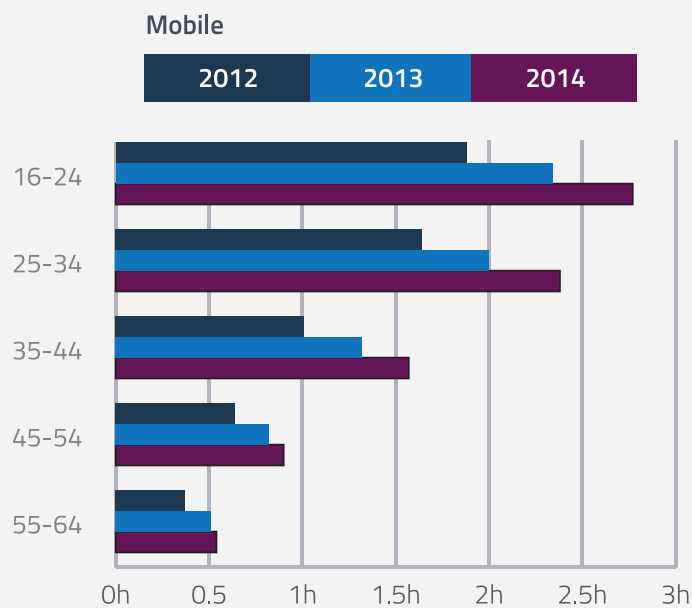


Question: On a typical day, roughly how many hours do you spend on/doing the following?
 /// Source: GlobalWebIndex Q4 2012 - Q2 2014 /// Base: Internet users aged 16-64

Mobile Internet Seeing Strong Rises, Especially Among 16-24s

- **Mobile now accounts for 30% of the time we spend on online media** – a rise from 22% in 2012. At a national level, mobile's share exceeds 40% in several fast-growth markets, led by Saudi Arabia, Thailand and the UAE.
- **2nd screening is prolific, with mobiles now the top device.** The vast majority of consumers are digitally multi-tasking as they watch shows.
- **16-24s are the biggest consumers of media via the mobile internet** (2.77 hours per day, up from 1.88 in 2012).

TIME ONLINE BY DEVICE, BY AGE



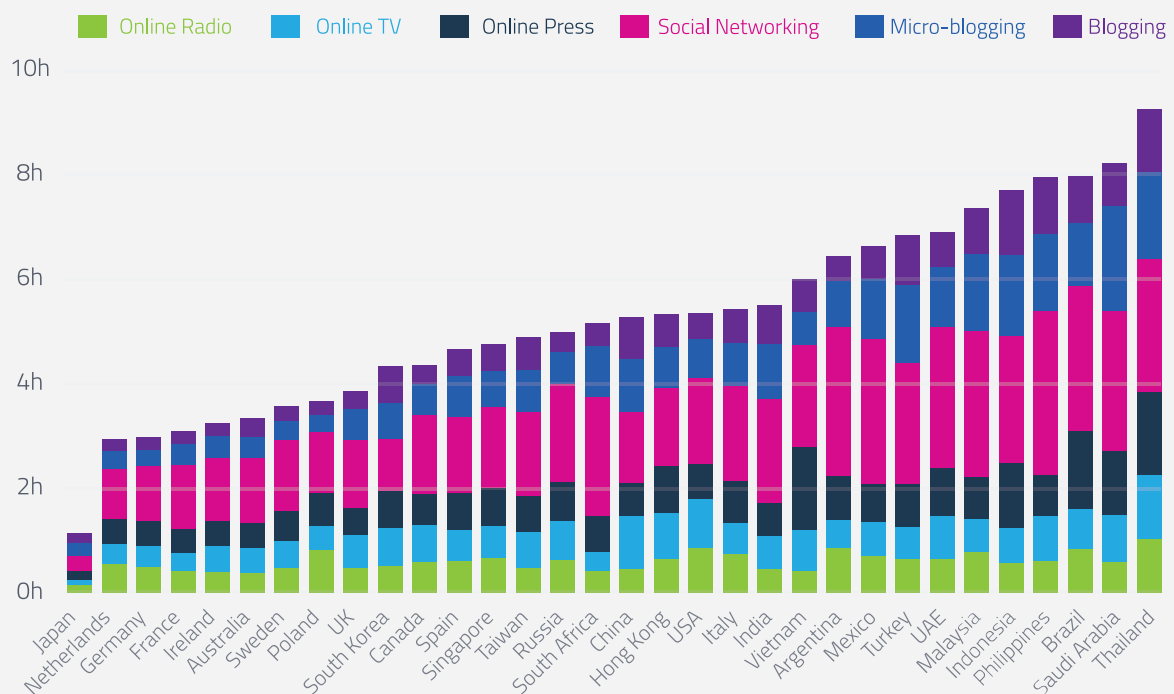
Question: On a typical day, roughly how many hours do you spend on/doing the following?

Source: GlobalWebIndex Q4 2012 - Q2 2014 // **Base:** Internet users aged 16-64

Social Networking Dominates Online Media Activities

- In every country surveyed, **social is the dominant online media activity**. Taken together, social networking and micro-blogging account for nearly 2.5 hours of our daily online time – something which translates to more than 40% of our online activities. And if we add in reading/writing blogs, that rises to nearly 50%.
- There are, however, **significant national fluctuations in terms of the time that people typically devote to networking**. In Brazil, the Philippines, Malaysia, Argentina and Mexico, for example, this activity occupies people for more than 2.75 hours each day. In France, Germany, the Netherlands and Japan, the equivalent figures are around 0.5 hours or less. This gives some context as to why usage figures for platforms like Facebook and Google+ are typically highest in fast-growth markets: consumers in these nations are *highly* social.

TIME SPENT ONLINE, BY ACTIVITY



Question: On a typical day, roughly how many hours do you spend online via the following devices? // **Source:** GlobalWebIndex Q1 - Q2 2014 // **Base:** Internet users aged 16-64 // **NOTE:** "Other" online activities are excluded from the chart



Jason Mander
Head of Trends

E: jason@globalwebindex.net // T: +44 20 7731 1614
A: GlobalWebIndex, Bedford House, 69-79 Fulham High
Street, London, SW6 3JW, England

www.globalwebindex.net