

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 | 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 and print press.

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INSIGHT REPORT | 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

Key Insights

- On a typical day, **internet users estimate that they spend almost 6 ½ hours online**. Smartphones are becoming ever more prominent within this: since 2012, estimated daily time spent online on mobiles has jumped from 1 hour 17 minutes to 2 hours 30 minutes. Over the same period, PCs/laptops/tablets 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 consumers to go online for longer periods of time each day, rather than do so at the direct expense of traditional devices.

- Age has a big impact on daily time spent online, with **16-24s online for 2 ½ hours longer than 55-64s**. The youngest consumers' enthusiasm for mobiles is having an impact here, with these devices now accounting for 46% of their total internet time (compared to just a fifth for 55-64s). It's for this reason that we see 16-24s ahead for online media activities like social networking and online TV.

- **There are just 5 of our 34 markets where consumers continue to spend longer 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, Germany and the Netherlands), the relative lack of enthusiasm for social networking is key. Fast-growth markets are spending the longest time online of all – the result of online populations having younger age profiles.

- Traditional forms of media are not being abandoned, though. **Despite constant claims that the internet is taking people away from other media formats, most of them are actually holding their own**. Linear TV remains ahead of online TV in all markets and represents the single biggest daily media activity. Similarly, broadcast radio remains ahead in the vast majority of markets. The situation is rather different for press, though: here, online is ahead of print editions in all but two markets.

- Across the 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 of them, and print press has dipped in 15**. Over the same period, online TV is up in 28, online radio/streaming has recorded increases in 21 and online press has risen in 26 places.

- **Daily time spent on social networks/services continues to increase**. Digital consumers are spending 34 minutes longer on social networks in 2016 than they were in 2012. 16-24s and those in fast-growth markets are the most enthusiastic social networkers, but social networks are capturing more time across all the age groups and markets.

- **Second-screening is prolific**: over 85% are using another device as they watch television, and with social networking and reading the news some of the top activities, it's clear that simultaneous multi-media consumption is now the norm. Mobiles are the chosen device for this, having opened up a 24-point lead.

Global Trends in Media Consumption

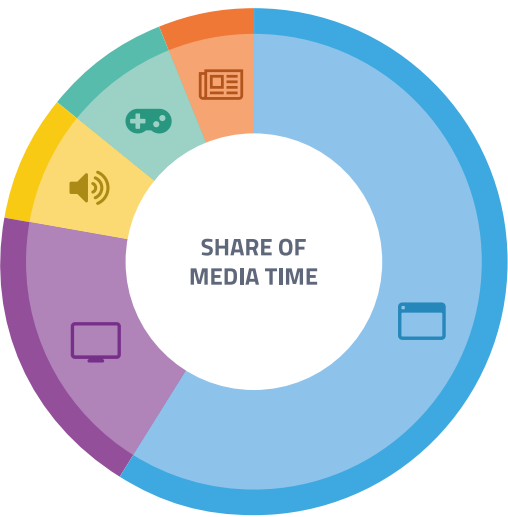
TRACKING MEDIA CONSUMPTION BEHAVIORS FROM 2012-2016

KEY FIGURES

- **Digital consumers are now spending almost 6 ½ hours per day online**, with 2 ½ hours of this time spent online via mobiles (up from 1 hour 17 mins in 2012).
- **Online TV is capturing almost an hour per day**, but linear TV is holding steady at about 2 hours.
- **Over 2 hours a day is spent on social networks/ services**, meaning this activity accounts for the biggest share of online media time (32%).
- With over 85% second-screening as they watch TV, **simultaneous multi-media consumption is now the norm**. Mobiles are the clear device of choice here.

Daily Media Time

MEDIA CONSUMPTION BEHAVIORS IN 2016
Number of hours and minutes per day typically devoted to the following



	hrs:min	%
Online	06:26	59%
Broadcast TV	02:05	19%
Broadcast Radio	00:52	8%
Games Consoles	00:52	8%
Print Press	00:39	6%

On a typical day, internet users estimate that they are now spending an **average of almost 6 ½ hours online**. This means that they're spending longer online than they are on linear TV, broadcast radio, games consoles and print press combined.

That linear TV composes such a considerable chunk of this daily media time is testament to this form of entertainment still retaining a central role within daily media portfolios. **The average consumer tunes in for 2 hours and 5 minutes each day**, meaning that TV accounts for close to a fifth of daily media time.

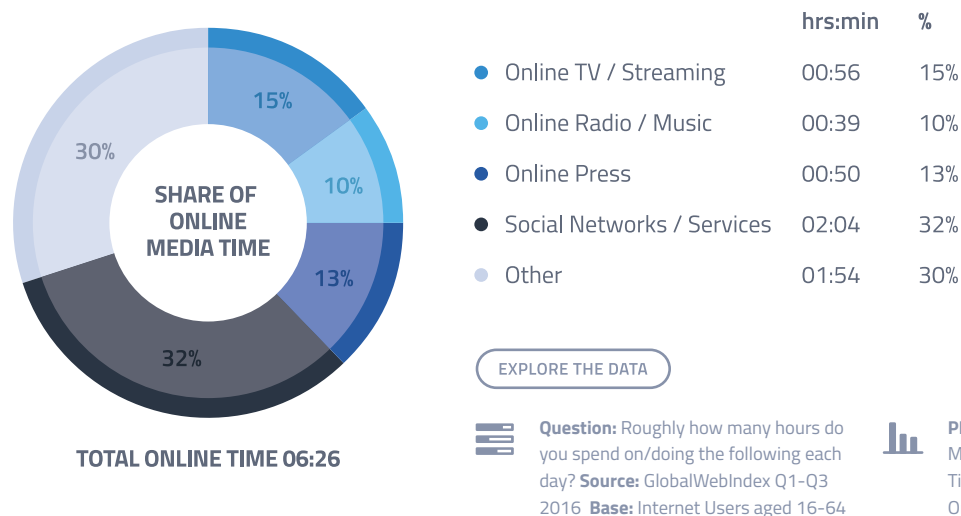
EXPLORE THE DATA

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 Spent Watching Linear TV

ONLINE MEDIA BEHAVIORS IN 2016

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



Of the time devoted to specific online media activities, **social networks and messaging services are by far the most popular.** They capture over 2 hours each day, representing almost a third of time spent online.

Online TV/streaming is now close to reaching the 1 hour per day mark (a figure which, as we explore later, reaches even higher among the youngest internet users and those in some fast-growth markets). But it still has some distance to cover before it can become a real challenger to traditional broadcast TV. That said, it's worth noting that it's now a fifth of internet users globally who say

they are using Netflix, which is one among many reasons why the figures for online TV are likely to continue increasing (and, in the context of streaming devices, mirroring and other similar behaviors, why maintaining a pure distinction between linear vs online TV/streaming is going to get slightly anachronistic).

Elsewhere, online press accounts for a decent 50 minutes of online time, with online radio/music capturing a slightly lower 39 minutes. While online radio still lags its broadcast counterpart, online news coverage is ahead of traditional print press.

Media Consumption: Online & Offline

When online and offline activities are examined in tandem, it's clear **just how much influence TV still exerts over daily activities**, as well as just how quickly social networking has established itself as a mainstream behavior. Taken together, these two activities account for more than 4 hours and close to 40% of media portfolios.

Arguably just as important is that traditional print press appears at the bottom of the list, behind all online forms of media.

DAILY MEDIA TIME: ALL ACTIVITIES

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

	hrs:min	%
Linear TV	02:05	19%
Social Networks/Services	02:04	19%
Broadcast Radio	00:52	8%
Games Consoles	00:52	8%
Online TV/Streaming	00:56	9%
Online Press	00:50	8%
Online Radio/Music	00:39	6%
Print Press	00:39	6%
Other	01:54	17%

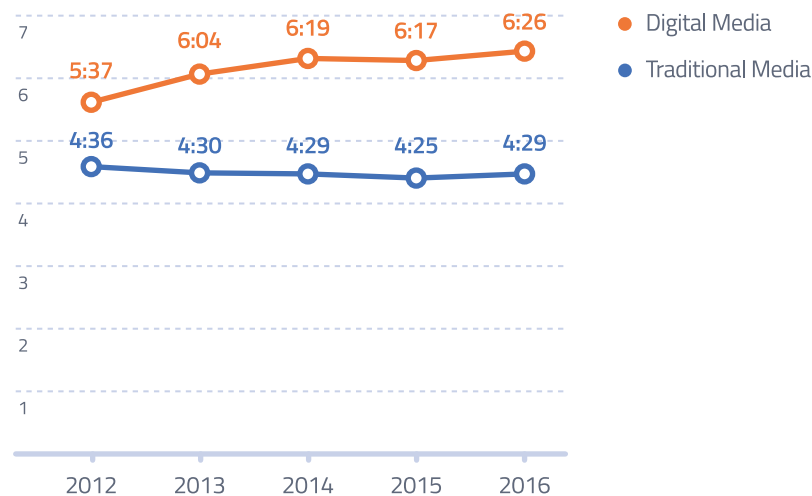
EXPLORE THE DATA

PRO Platform: Media Consumption > Time Spent Watching Linear TV

Digital vs. Traditional Media Over Time

DIGITAL vs TRADITIONAL OVER TIME

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



Looking at the battle of digital and traditional media over time yields some interesting results. **Each year, internet users are spending consistently longer on digital media** - now devoting around 50 minutes longer to this in 2016 than they were in 2012.

Crucially, over this same period, figures for traditional media have remained remarkably stable, taking about the same amount of daily time now as they did back in 2012. That's a key point to note and one which will recur throughout this report: **despite constant claims**

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



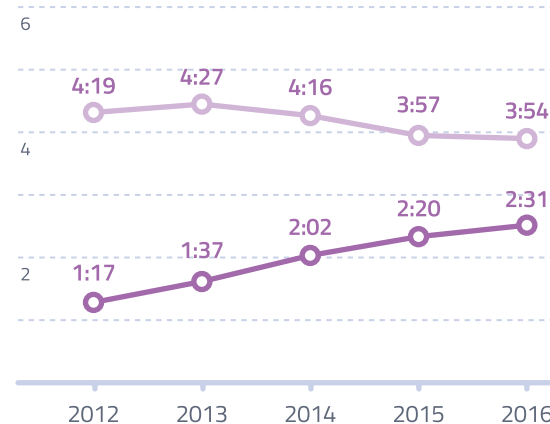
PRO Platform:
Media Consumption >
Time Spent Watching Linear TV

TIME SPENT ONLINE: PCS/LAPTOPS/TABLETS vs MOBILES

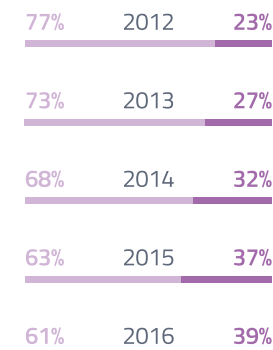
Number of hours and minutes typically spent online via the following devices each day

● PC/Laptops/Tablets ● Mobiles

HRS:MIN



SHARE OF ONLINE TIME



that the internet is taking people away from other media formats, most of them are actually holding their own. That behaviors such as second-screening are causing many activities to happen simultaneously rather than sequentially is central to this (a theme we explore in more depth below).

One of the most important changes since 2012 has been the rise of the mobile internet. Over the last five years, total time spent online might

EXPLORE THE DATA



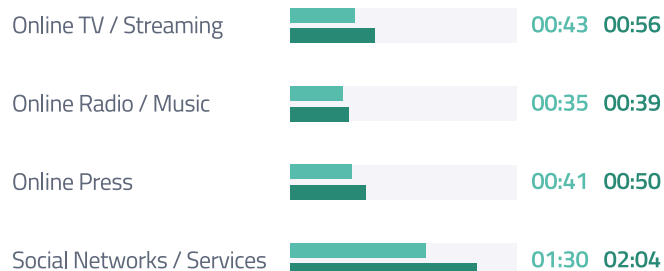
Question: Roughly how many hours do you spend online on a PC/Tablet/Laptop or mobile during a typical day?
Source: GlobalWebIndex 2012 & 2016 (averages across all waves of research conducted in each year) **Base:** Internet Users aged 16-64



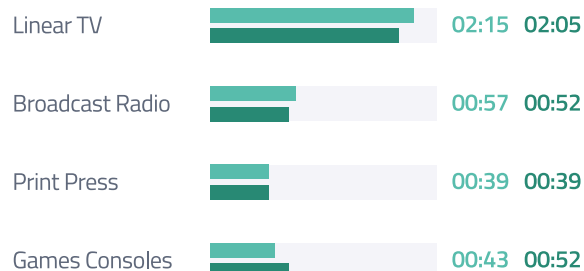
PRO Platform:
Media Consumption >
Time Online on Mobile

ONLINE MEDIA CONSUMPTION BEHAVIORS: 2012 vs 2016*Number of hours and minutes per day typically devoted to the following*

● 2012 ● 2016

**OFFLINE MEDIA CONSUMPTIONS BEHAVIORS: 2012 vs 2016***Number of hours and minutes per day typically devoted to the following*

● 2012 ● 2016



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

have been increasing **but time spent on PCs, laptops and tablets has decreased**. Overall increases in internet consumption are thus being driven by progressively heavier usage of mobiles – devices which have jumped from just 1 hour 17 minutes back in 2012 to 2 ½ hours in 2016. As we outline in subsequent chapters, it's fast-growth markets and younger demographics which are at the forefront of this. Even so, the rise of mobile internet usage is a trend which transcends all markets and segments.

Since 2012, all of the specific online activities have seen increases in terms of the daily time devoted to them. That said, it's important to recognize the

relatively slow nature of the rises; while their upward trajectories are clear to see, changes to digital consumption tend to take place more slowly than is sometimes supposed. Online radio has seen just a 4-minute increase, for example, while online press has similarly risen by only 9 minutes.

Social networks/services set themselves apart here, capturing an additional 34 minutes per day than they were back in 2012. It's sometimes said that the social "bubble" has burst but our data makes it clear that networks are continuing to become even more deeply integrated inside daily behaviors. The shift to mobile is playing a vital role here (whereby users are visiting

networks whenever and wherever they please), as is the incorporation of ever more activities within social platforms.

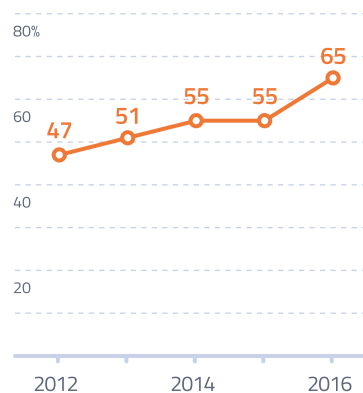
Once again, though, we see that traditional forms of media are managing to hold their own as digital media strives forward. Although linear TV and broadcast radio are taking slightly less time than they were 4 years ago, figures can be subject to small year-on-year fluctuations and neither of the decreases have been sizable. TV is a good example here: internet users might now be devoting almost an hour to online TV or streaming, but they're still spending twice as long in front of their TV sets.

Second-Screening

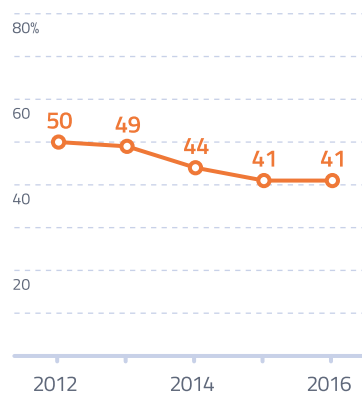
SECOND-SCREENING BEHAVIORS BY DEVICE

% who have recently second-screened via the following

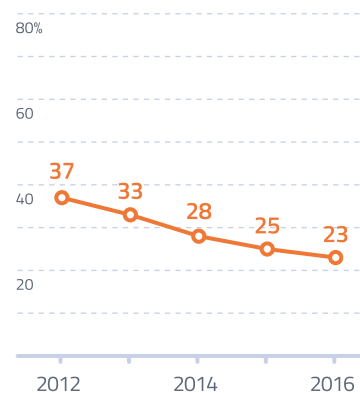
Mobile Phone



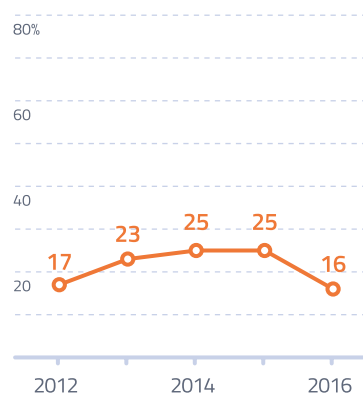
Laptop PC



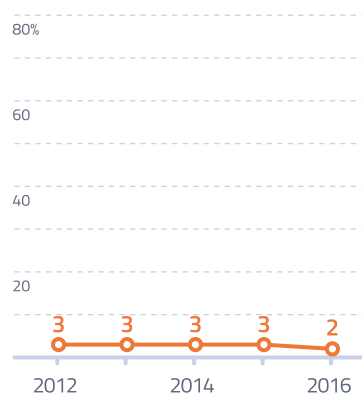
Desktop PC



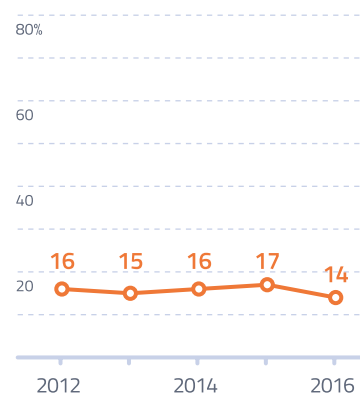
Tablet



e-Reader



None of the Above



With television continuing to exert so much influence over media behaviors, it's key to understand second- or dual-screening – **a widespread activity which over 85% of internet users report doing**. Indeed, its mainstream nature is one of the key drivers behind online time (especially via mobile) continuing to increase each year; many media activities are running in parallel with each other, with simultaneous multi-media consumption now the norm.

In terms of devices, **mobiles are the clear favorite for second-screening**. Having overtaken once-dominant laptops during 2013, they now have a 24-point lead. Meanwhile, laptops and desktops have been posting year-on-year declines since 2012. In the years ahead, these second-screening preferences will be another factor pushing online time on mobiles up even further, just as it will contribute to PCs and laptops losing further ground.

EXPLORE THE DATA



Question: Thinking about when you've watched TV recently, which of the following devices have you also used at the same time? **Source:** GlobalWebIndex 2012 & 2016 (averages across all waves of research conducted in each year) **Base:** Internet Users aged 16-64



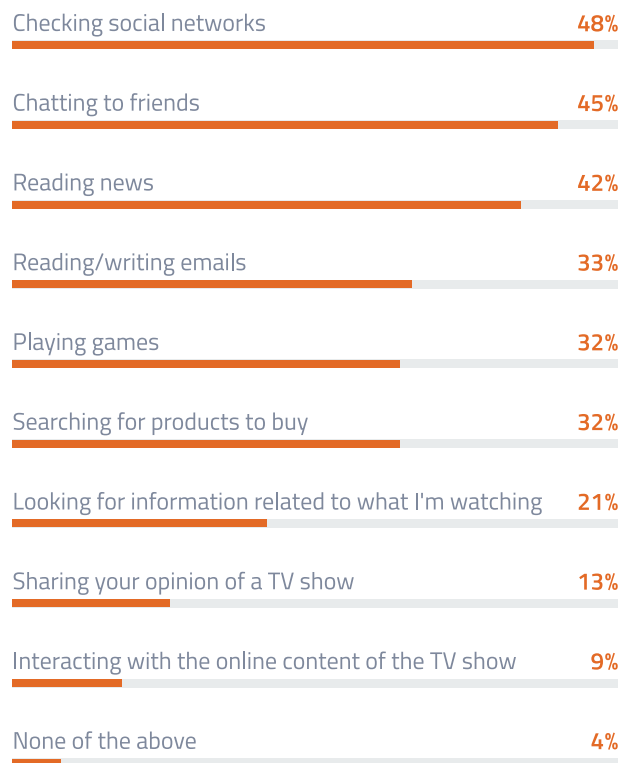
PRO Platform:
Media Consumption >
Second-Screen Devices

As they second-screen, **internet users are most likely to be social networking**. Given that chatting to friends also scores very highly, we have some context for why people are spending so much of their daily time on social networks and messaging services. What's more, over 4 in 10 are reading news – again highlighting that many media activities are happening simultaneously rather than sequentially.

What's particularly striking here is that all of the **most popular second-screen activities are rather "informal" in nature** (in that they do not involve activities which automatically engage viewers with the content being aired on the main screen). That around only 1 in 10 online adults are sharing TV-related views or interacting with related online content as they dual-screen is certainly pretty significant. So, **rather than seeing the second screen as an *additional* place to drive viewer engagement, it should actually be viewed as a *distraction***. These trends also suggest that integrating second-screen content with social networks is one of the best ways to increase viewer awareness.

SECOND-SCREENING BEHAVIORS BY ACTIVITY

% who were doing the following the last time they second-screened



EXPLORE THE DATA



Question: The last time you were watching TV and using the internet, which of the following were you doing? **Source:** GlobalWebIndex Q2-Q3 2016
Base: Internet Users aged 16-64



PRO Platform:
Media Consumption >
Second-Screen Activities

Media Consumption by Age

ANALYZING AGE-BASED DIFFERENCES IN MEDIA BEHAVIORS

KEY FIGURES

- **16-24s are clocking up over 7 hours per day online**, with 46% of this time being spent on their mobiles (3 hours 15 minutes). For 55-64s, mobiles account for just a fifth of total online time.
- **Engagement with broadcast TV and radio increases in line with age**, while the youngest age groups are spending the longest reading print press.
- **16-34s are the only age group to be watching more than an hour of online TV per day**. They are also the heaviest social networkers, devoting over 2.5 hours a day to social networks/services.

Time Spent on Media Each Day

As might be expected **16-34s are spending the most time on media**, with this age group engaging with the internet, TV, radio, press and gaming for over 11 hours per day (but with much of this time taking place concurrently). 25-34s in particular stand out here, spending almost an hour longer consuming media than their 35-44-year-old counterparts.

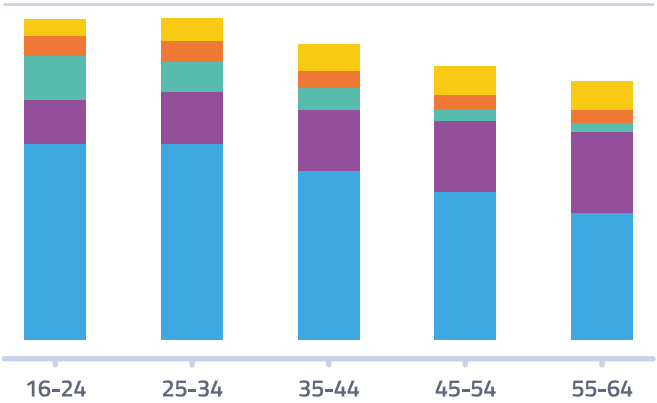
There are important age-based patterns when it comes to the activities which make up this time. **Pretty striking is that 16-24s are devoting the smallest amount of time to both linear TV and broadcast radio – with engagement with both *increasing* in line with age**. In fact, 55-64s are watching linear TV for about twice as long as 16-24s, with the same story also seen for broadcast radio.

Predictably, 16-24s lead once more when it comes to using games consoles. Arguably less expected is that **the youngest two groups are reading the most traditional print press each day**. It's often said that this sector's major challenge lies in engaging tech-oriented young consumers but it's actually in the oldest groups where we see the lowest figures.

When converted to percentage shares, age-based differences become particularly stark. **Look at time spent online and it accounts for 64% of all media time among 16-24s but just 41% for 55-64s**. Conversely, linear TV grabs 26% of time in the oldest age group compared to just 14% in the youngest.

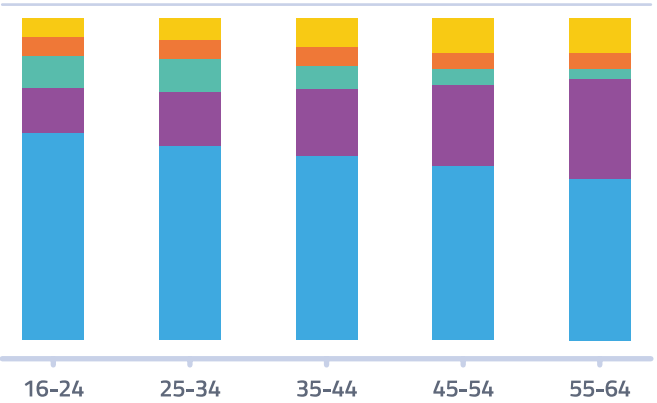
MEDIA CONSUMPTION BEHAVIORS BY AGE

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



	16-24	25-34	35-44	45-54	55-64
Online	07:06	07:05	06:06	05:21	04:36
Linear TV	01:36	01:55	02:13	02:35	02:57
Games Consoles	01:06	01:05	00:48	00:27	00:18
Print Press	00:43	00:44	00:38	00:30	00:29
Broadcast Radio	00:37	00:52	00:58	01:03	01:04
TOTAL MEDIA TIME	11:11	11:43	10:45	09:59	09:26

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%

- Broadcast Radio
- Print Press
- Games Consoles
- Broadcast TV
- Online

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 Spent Watching Linear TV

Online Media Behaviors

On a typical day, **the youngest online adults are online for 2 ½ hours longer than their 55-64 year-old counterparts**. As a result, it’s unsurprising that younger age groups tend to be ahead for the specific online activities tracked in the chart.

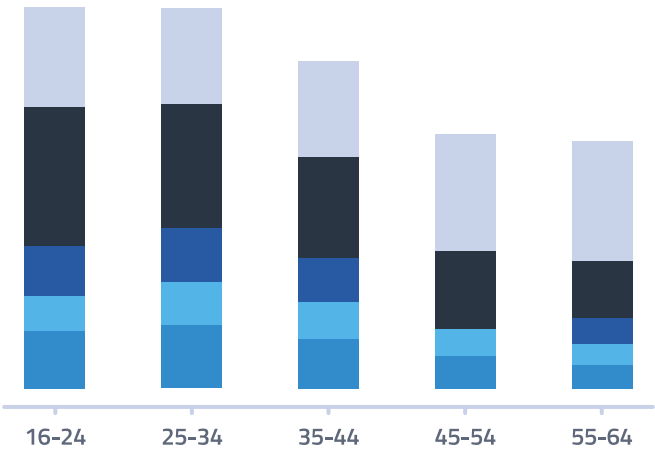
For TV, 16-34s are at the forefront of the shift online, and online TV/streaming has become a key part of their daily television consumption. They’re the one group to be watching more than an hour per day, though 35-44s are on the verge of reaching this landmark too.

It’s 25-34s who are leading the charge to online forms of press and are the only age group where we see time spent on this pass the 1 hour per day mark. Crucial to note, though, is that **almost all age groups are spending longer reading online press than print press** – with 55-64s being the only exception (where both are capturing 29 minutes a day).

One trend that transcends demographics is that social networking is by far the most important online media activity. Unsurprisingly, it’s 16-24s who are the most avid social networkers, devoting over 2.5 hours a day to this activity. But **even 55-64s are now spending more than an hour on social platforms – longer than they spend on online TV and online press combined**.

ONLINE MEDIA BEHAVIORS BY AGE

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



	16-24	25-34	35-44	45-54	55-64
Online TV/Streaming	01:04	01:10	00:55	00:36	00:26
Online Radio/Music	00:39	00:48	00:41	00:30	00:23
Online Press	00:55	01:00	00:49	00:36	00:29
Social Networks/Services	02:35	02:19	01:52	01:26	01:04
Other	01:52	01:46	01:48	02:11	02:13
TOTAL MEDIA TIME	07:06	07:05	06:06	05:21	04:36

- Other
- Social Networks / Services
- Online Press
- Online Radio / Music
- Online TV / Streaming

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 Spent Watching Online TV

Time Spent Online: PCs/Laptops/Tablets vs. Mobiles

TIME SPENT ONLINE: PCS/LAPTOPS/TABLETS vs MOBILES

Number of hours and minutes typically spent online via the following devices each day

● 2012 ● 2013 ● 2014 ● 2015 ● 2016

PC/Laptop/Tablet Mobile

MEDIA CONSUMPTION BY AGE



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 Online on Mobile

Globally, we saw earlier that mobiles continue to capture more and more time. And crucially, this is a trend that holds true across all of the age groups.

That said, the scale and speed of those increases can vary dramatically. **Among 25-34s, for example, mobile internet usage has doubled since 2012 to hit the 3-hour per day mark.** 16-24s and 35-44s have also seen big increases here, with the former spending the longest of all on their mobiles (3 hours 15 minutes). In contrast, for 55-64s, the figure has risen to a much more modest 58 minutes, though this is still about 2.5x higher than it was in 2012.

In terms of percentages, **mobiles now account for 46% of total internet time among 16-24s.** If prevailing trends continue, that means we should see mobiles reaching parity with PCs and laptops in 2017. Of course, it's hardly a surprise that this demographic will cross-over into being mobile-first before any other, but that mobiles are already poised to displace the other more traditional devices is still striking.

At the other end of the spectrum, smartphones are grabbing just a fifth of online time for the 55-64s. Although mobiles continue to push new ground, they're unlikely to challenge PCs and laptops in any serious way in the next couple of years among the older age groups. Also worth noting is that for all the age groups the year-on-year declines being recorded for traditional devices are neither dramatic nor fatal. Indeed, while some activities certainly are migrating away from more traditional devices towards mobiles, the bigger story here is that **mobiles are encouraging consumers to go online for longer periods of time each day.**

Daily Media Behaviors: 2012 vs. 2016

Taking a look at the specific offline/online media behaviors over time yields some interesting results. Particularly striking is the battle between online and broadcast TV: while linear TV has seen gentle declines across each of the age groups, we've seen online TV record a small increase. The direction of trends here are pretty plain to see, but it will still be some time until we see online TV overtake traditional. **It's not simply the case that there is a direct or clear-cut shift from traditional to online formats, though:** in reality, changes are much more complex and nuanced than that.

Among 16-24s, time spent on linear TV, broadcast radio and physical print press has dipped slightly. However, the gentle nature of the decreases is important to note, and it's certainly telling that the younger age groups are the biggest readers of printed press.

Interestingly, **all the online activities have seen consistent cross-age increases.** Although for online radio and press these rises are only a few minutes or so, they are much more substantial for social networks/services. 55-64s have seen the smallest increases, but even for these internet users, they're still spending around 20 minutes longer on these services in 2016 than they were back in 2012.

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:

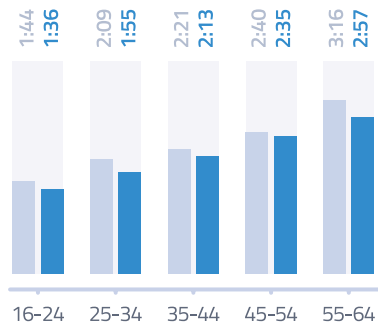
Media Consumption >
Time Spent Watching Online TV

OFFLINE MEDIA CONSUMPTIONS BEHAVIORS: 2012 vs 2016

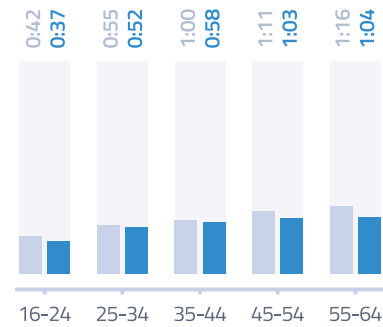
Number of hours and minutes per day typically devoted to the following

● 2012 ● 2016

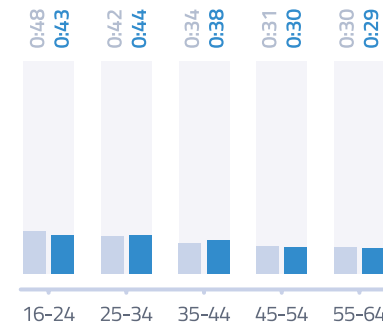
Linear TV



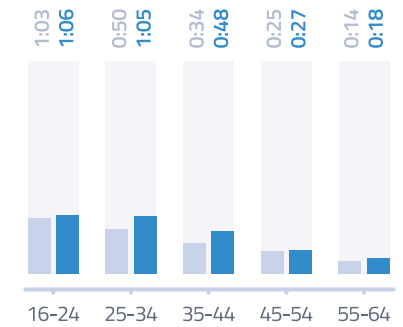
Broadcast Radio



Print Press



Games Consoles

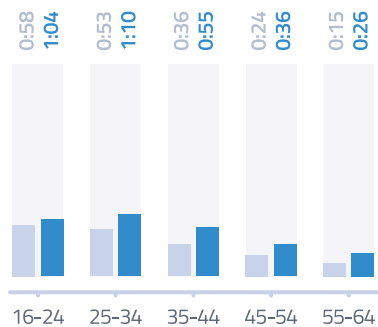


ONLINE MEDIA CONSUMPTIONS BEHAVIORS: 2012 vs 2016

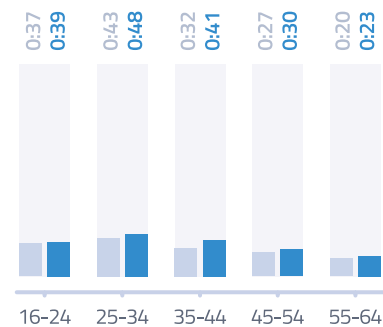
Number of hours and minutes per day typically devoted to the following

● 2012 ● 2016

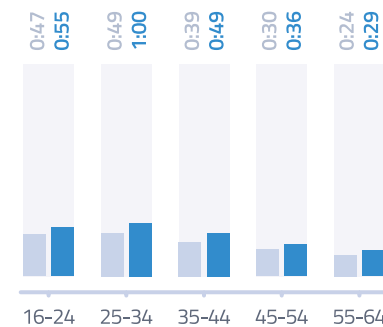
Online TV / Streaming



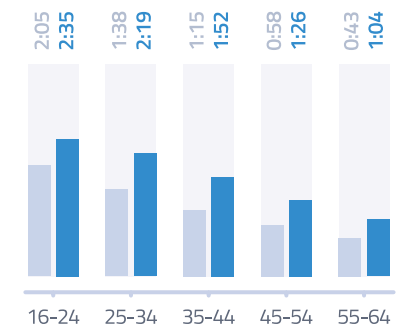
Online Radio / Music



Online Press



Social Networks / Services



National Differences in Media Consumption

COUNTRY-BY-COUNTRY FIGURES
FOR ALL KEY METRICS

KEY FIGURES

- **There are just 5 markets tracked by GWI where consumers are spending longer each day on traditional rather than digital forms of media** – these are mature markets with digitally-conservative and older online populations.
- **Fast-growth markets lead when it comes to the total daily time devoted to media.** Brazil tops the table, with the US scoring the highest figure of all the mature markets we track.
- **In most fast-growth markets, mobiles are now capturing 40-50% of online time.** The equivalent figures dip down to 25% or below in places like France and Belgium.
- **There are now 7 markets where people are watching online TV for more than 1 hour per day.** Fast-growth nations in APAC and the Middle East are at the forefront, but the US takes second place overall.

Digital vs. Traditional by Market

Of the 34 markets tracked by GWI, there are just 5 where consumers continue to spend longer each day on traditional rather than digital forms of media. All of them are mature markets, with relatively old and digitally-conservative online populations. There are other specific reasons to explain this trend too. In the USA, the enduring popularity of linear TV is the main contributor. In the clutch of Western European markets (Belgium, France, Germany and Netherlands), the relative lack of enthusiasm for social networking is key.

There are strong market-by-market variations in the total daily time devoted to media. Broadly speaking, **it is fast-growth markets which lead** here. Brazil tops the table on a substantial 14 hours and 51 minutes. As discussed in the introduction, this is primarily driven by fast-growth markets having relatively low internet penetration rates; that means their online populations contain higher-than-average numbers of young, urban and affluent adults and these demographics are naturally more

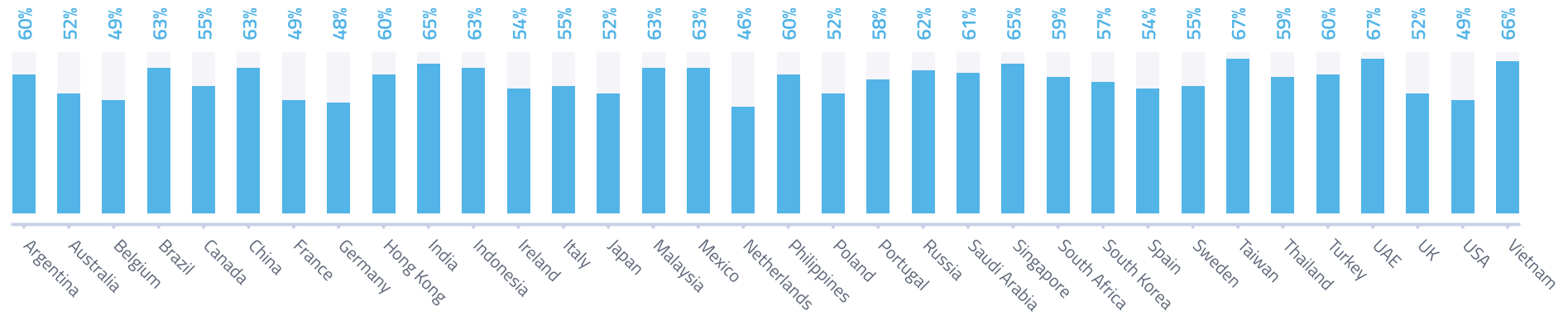
engaged with online media. What's more, these same markets have embraced mobiles the most enthusiastically: they spend the most time online each day and are also more likely to be consuming media simultaneously rather than sequentially (e.g. by second-screening).

It's also generally these markets where **online sources account for the highest shares of total media consumption** – with the UAE having seen the biggest shift of all (where internet users are spending over twice as long on digital than traditional media forms). It's a similar story in Taiwan too.

Of the mature markets tracked by GWI, **the US is spending the longest on media each day.** That's a direct result of Americans watching so much linear television each day. This genre is also the reason why China comes towards the bottom of the table; Chinese consumers are spending 2 hours less in front of their TV sets (on 1 hour and 20 minutes) than their American counterparts.

DIGITAL vs TRADITIONAL MEDIA BY MARKET

% of total media time that is digital



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

	Digital	Traditional
Argentina	08:13	05:30
Australia	05:07	04:44
Belgium	04:51	05:05
Brazil	09:17	05:34
Canada	05:46	04:41
China	05:51	03:27
France	04:48	04:56
Germany	04:43	05:10
Hong Kong	05:47	03:51
India	07:47	04:17
Indonesia	08:35	05:03
Ireland	05:06	04:19

	Digital	Traditional
Italy	06:20	05:12
Japan	03:41	03:21
Malaysia	08:33	05:01
Mexico	08:16	04:46
Netherlands	04:28	05:17
Philippines	08:40	05:43
Poland	05:48	05:17
Portugal	06:06	04:24
Russia	06:18	03:51
Saudi Arabia	07:21	04:37
Singapore	06:41	03:35
South Africa	08:11	05:35

	Digital	Traditional
South Korea	04:55	03:42
Spain	05:48	05:01
Sweden	05:29	04:28
Taiwan	07:16	03:33
Thailand	08:33	06:02
Turkey	06:48	04:32
UAE	08:03	03:58
UK	05:37	05:12
USA	06:24	06:35
Vietnam	06:50	03:33

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 Online on Mobile

Traditional Media Behaviors

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.** As mentioned, the US stands out here – where internet users are spending

over half an hour longer than second-placed France. For broadcast TV, though, there isn't necessarily a fast-growth/mature market split: we see Argentina, Brazil, Thailand and the Philippines all in the top 10.

Likewise, time spent listening to broadcast radio can vary from highs of 1 hour 48 minutes in the Netherlands, to lows of around half an hour in Vietnam, Taiwan and South Korea.

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 Spent Watching Linear TV

OFFLINE MEDIA BEHAVIORS IN 2016

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

	Lin	Broadcast Radio	Print Press	Games Consoles
Argentina	02:43	01:30	00:29	00:47
Australia	02:25	01:06	00:29	00:43
Belgium	02:15	01:51	00:27	00:30
Brazil	02:37	01:09	00:46	01:01
Canada	02:18	01:09	00:27	00:45
China	01:20	00:33	00:44	00:48
France	02:46	01:02	00:25	00:41
Germany	02:28	01:33	00:32	00:35
Hong Kong	01:38	00:45	00:38	00:48
India	01:51	00:37	00:43	01:04
Indonesia	02:23	00:43	00:42	01:14
Ireland	02:06	01:17	00:27	00:28
Italy	02:25	01:09	00:42	00:55
Japan	02:15	00:25	00:19	00:21
Malaysia	02:04	01:03	00:43	01:09
Mexico	02:07	01:01	00:31	01:05
Netherlands	02:25	01:48	00:27	00:36

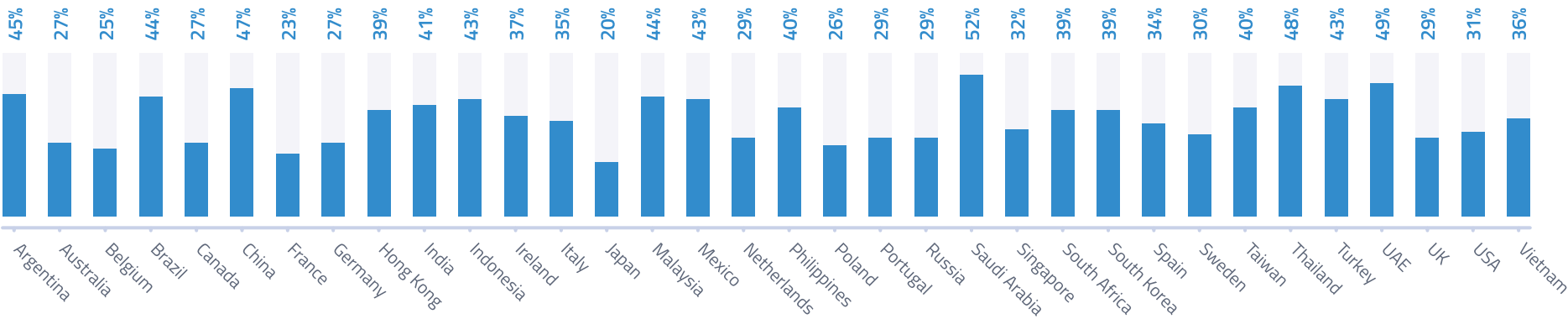
	Linear TV	Broadcast Radio	Print Press	Games Consoles
Philippines	02:30	00:57	00:41	01:34
Poland	02:26	01:46	00:32	00:33
Portugal	02:07	01:13	00:30	00:31
Russia	02:07	00:51	00:23	00:30
Saudi Arabia	01:50	00:43	00:45	01:17
Singapore	01:33	00:53	00:34	00:33
South Africa	02:17	01:48	00:42	00:46
South Korea	02:11	00:31	00:28	00:30
Spain	02:23	01:10	00:33	00:54
Sweden	02:02	01:16	00:29	00:39
Taiwan	01:44	00:31	00:34	00:43
Thailand	02:26	00:56	01:02	01:36
Turkey	02:14	00:45	00:44	00:48
UAE	01:34	00:45	00:43	00:54
UK	02:39	01:10	00:30	00:51
USA	03:19	01:20	00:43	01:12
Vietnam	01:26	00:29	00:45	00:52

*FIGURES IN BOLD REPRESENT THE TOP 5 MARKETS FOR EACH ACTIVITY

Time Spent Online: PCs vs Mobiles

TIME SPENT ONLINE: PC/LAPTOPS/TABLETS vs MOBILES

Mobile Share of Online Time



Number of hours and minutes typically spent online via the following devices each day

	PC/Laptop/Tablet	Mobile		PC/Laptop/Tablet	Mobile		PC/Laptop/Tablet	Mobile
Argentina	04:32	03:41	Italy	04:05	02:14	South Korea	03:00	01:55
Australia	03:44	01:22	Japan	02:57	00:44	Spain	03:49	01:59
Belgium	03:39	01:12	Malaysia	04:48	03:44	Sweden	03:50	01:39
Brazil	05:12	04:05	Mexico	04:41	03:34	Taiwan	04:20	02:56
Canada	04:11	01:34	Netherlands	03:11	01:16	Thailand	04:28	04:04
China	03:08	02:43	Philippines	05:12	03:28	Turkey	03:52	02:55
France	03:43	01:05	Poland	04:18	01:29	UAE	04:07	03:55
Germany	03:27	01:16	Portugal	04:19	01:46	UK	03:58	01:38
Hong Kong	03:32	02:14	Russia	04:26	01:51	USA	04:24	02:00
India	04:35	03:12	Saudi Arabia	03:34	03:47	Vietnam	04:21	02:28
Indonesia	04:51	03:43	Singapore	04:31	02:10			
Ireland	03:12	01:54	South Africa	05:01	03:09			

As mentioned, **fast-growth markets have embraced mobiles the most enthusiastically**. As well as swathes of consumers coming online for the first time via these devices, internet users in these markets are also most likely to select their smartphone when we ask them their most important device for getting online.

This is particularly apparent when we look at the share of online time that mobiles are capturing each day. **In most fast-growth markets, mobiles are now capturing 40-50% of online time** – meaning they are close to reaching the Mobile Tipping Point – the point when internet users will be spending longer online on their mobiles than all other devices *combined*. Consumers are already mobile-first in Saudi Arabia.

The equivalent figures can be much, much lower in several mature markets, dipping to 25% or below in the digitally-conservative markets of France, Belgium and Japan. **Around 5 of the 34 markets are spending less than around 1 ¼ hours a day on their mobiles** – a figure which compares to more than 4 hours in Thailand and Brazil. In part, the picture in these mature markets is the result of their high internet penetration rates, which means its online population contains a relatively high proportion of older consumers – a group who are much more likely to remain wedded to their PCs/laptops. Over time, we can expect these differences to become less pronounced but there's little doubt that they will remain prominent in the short-term future.

EXPLORE THE DATA



Question: Roughly how many hours do you spend online on a PC/Tablet/Laptop or Mobile during a typical day? **Source:** GlobalWebIndex Q1-Q3 2016
Base: Internet Users aged 16-64



PRO Platform:
Media Consumption >
Time Online on Mobile

Online Media Behaviors

ONLINE MEDIA BEHAVIORS IN 2016

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

	Online TV /Streaming	Online Radio /Music	Online Press	Social Networks /Services
Argentina	00:42	00:49	00:58	03:28
Australia	00:42	00:28	00:36	01:33
Belgium	00:24	00:32	00:39	01:35
Brazil	00:55	00:53	01:52	03:41
Canada	00:52	00:33	00:33	01:39
China	01:10	00:38	00:47	01:42
France	00:28	00:26	00:30	01:24
Germany	00:33	00:32	00:36	01:07
Hong Kong	00:45	00:33	00:46	01:37
India	00:55	00:38	00:50	02:26
Indonesia	00:49	00:36	01:12	02:59
Ireland	00:41	00:24	00:36	01:36
Italy	00:42	00:41	00:46	02:03
Japan	00:09	00:11	00:13	00:30
Malaysia	00:55	00:47	00:55	03:18
Mexico	00:52	00:39	00:51	03:34
Netherlands	00:30	00:38	00:33	01:14

*FIGURES IN BOLD REPRESENT THE TOP 5 MARKETS FOR EACH ACTIVITY

When it comes to specific online behaviors/ activities, **it's social networking that captures the biggest share of online time.** But time devoted to this varies dramatically between markets. Countries in Latin America tend to post the highest figures of all, whereas Japanese consumers are spending

just half an hour per day on this. Japan's shortage of enthusiasm for social media, as well as Facebook's lack of success in this country, is having an impact here; of our 34 markets, Japan is just one of three where Facebook falls from pole position (to be replaced by YouTube, Twitter and LINE).

	Online TV /Streaming	Online Radio /Music	Online Press	Social Networks /Services
Philippines	01:01	00:43	01:00	04:03
Poland	00:40	00:49	00:44	01:39
Portugal	00:26	00:43	00:21	02:12
Russia	00:40	00:32	00:38	02:18
Saudi Arabia	01:09	00:51	01:18	02:56
Singapore	00:40	00:34	00:40	01:53
South Africa	00:30	00:28	00:46	02:50
South Korea	00:39	00:24	00:37	01:02
Spain	00:44	00:40	00:49	01:45
Sweden	00:41	00:33	00:40	01:34
Taiwan	00:47	00:27	00:42	01:59
Thailand	01:31	01:11	01:43	02:48
Turkey	00:51	00:45	00:56	02:57
UAE	01:01	00:35	00:51	03:18
UK	00:51	00:31	00:36	01:39
USA	01:13	00:59	00:52	02:03
Vietnam	01:01	00:33	01:25	02:30

Elsewhere, **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 Q1-Q3 2016
Base: Internet Users aged 16-64



PRO Platform:
Media Consumption >
Time Spent Watching Online TV

Traditional vs. Digital: TV, Radio and Press

TRACKING THE PROGRESS OF DIGITAL VS
TRADITIONAL IN KEY ENTERTAINMENT CATEGORIES

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, online radio/streaming is up in 21 and online press has risen in 26 places.
- Linear TV remains ahead of online TV in all 34 markets.
- For radio/music, online has taken the lead from broadcast forms in 4 markets.
- Online press is now preferred to printed versions in all but 2 markets.

Linear TV vs. Online TV

Comparing linear vs online viewing behaviors in 2016 is perhaps the best way to illustrate how dominant the former remains; **linear remains ahead in all 34 of our markets**, and in 22 it still accounts for over 2.5x as much daily viewing as online.

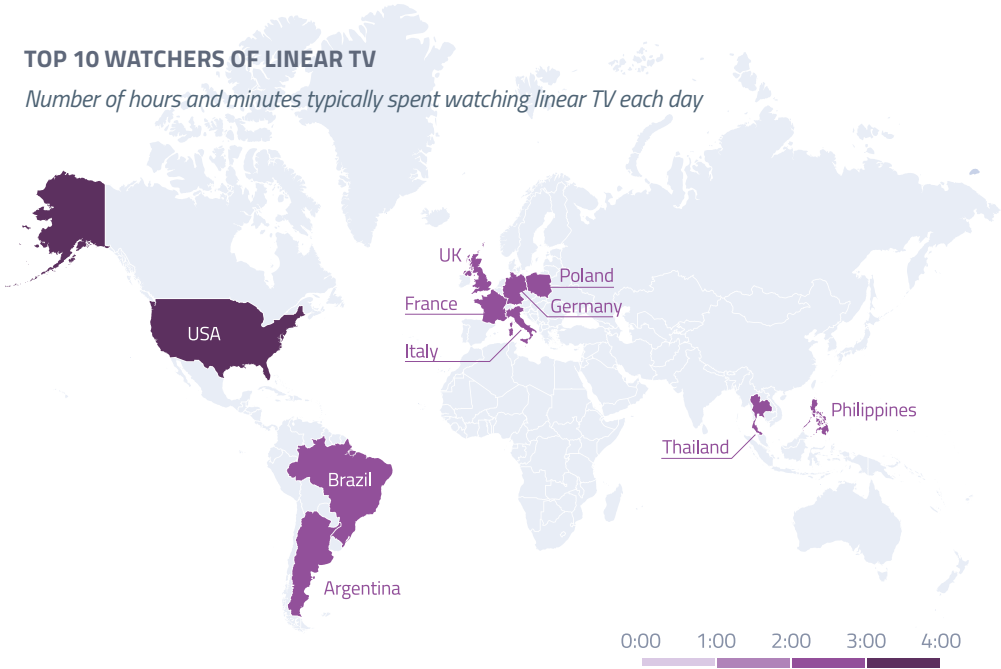
The USA, France and Argentina are the most enthusiastic watchers of linear TV: everyday they spend over 2 hours longer watching this than online TV. At the other end of the spectrum, **it's in China where we are closest to seeing online TV (1 hour 10 minutes) reach parity with linear (1 hour 20 minutes)**. The UAE and Vietnam are then next in line for this landmark. Interestingly, the USA is one of the leading watchers of online TV, but it's also one of the markets where we see the greatest disparity (over 2 hours).

It's certainly telling that it's in the fast-growth markets where we're closest to seeing online TV close the gap on broadcast. In part, that's being driven by usage of VPNs as a way to access better entertainment content. Globally, **3 in 10 internet users say they have accessed the web via one of these tools**, with 13% of online adults (and 45% of VPN users) reporting that they have done this in order to get better entertainment content. This behavior is much more prominent in fast-growth markets, with a fifth or more of internet users in Malaysia, Indonesia, Thailand and India now using VPNs to find better shows. It's hardly a coincidence that it's in this type of market where home-grown on-demand or OTT services tend to be less widespread/developed and where global providers like Netflix have the weakest presence.

TV: LINEAR vs ONLINE

TOP 10 WATCHERS OF LINEAR TV

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

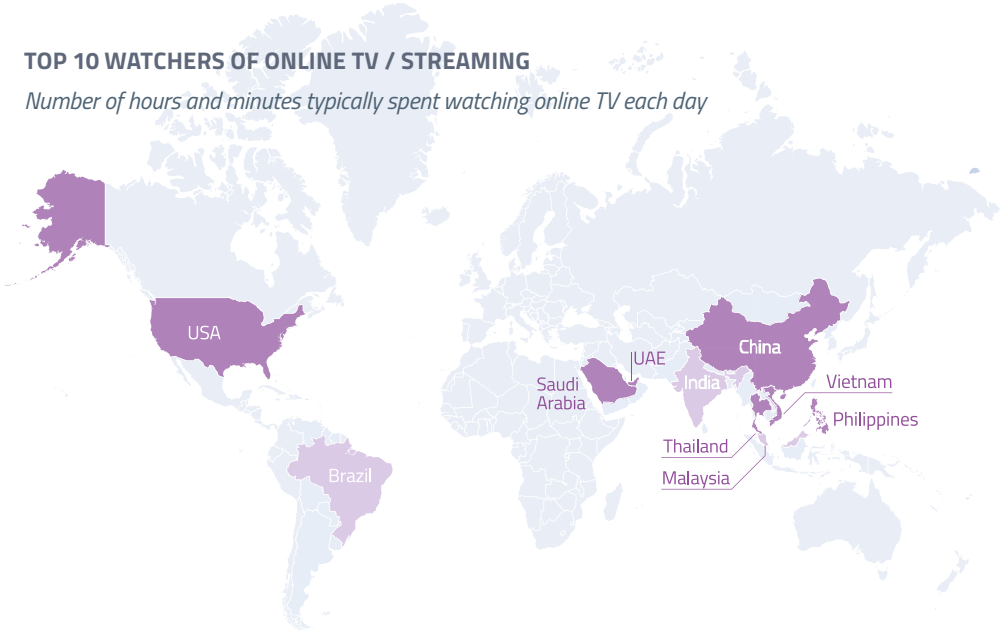


	Linear TV	Difference*
USA	03:19	02:06
France	02:46	02:17
Argentina	02:43	02:01
UK	02:39	01:48
Brazil	02:37	01:41
Philippines	02:30	01:28
Germany	02:28	01:54
Thailand	02:26	00:54
Poland	02:26	01:45
Italy	02:25	01:43

*Difference Between Linear & Online

TOP 10 WATCHERS OF ONLINE TV / STREAMING

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



	Online TV	Difference*
Thailand	01:31	00:54
USA	01:13	02:06
China	01:10	00:10
Saudi Arabia	01:09	00:40
UAE	01:01	00:32
Philippines	01:01	01:28
Vietnam	01:01	00:24
Brazil	00:55	01:41
India	00:55	00:55
Malaysia	00:55	01:09

*Difference Between Linear & Online

EXPLORE THE DATA



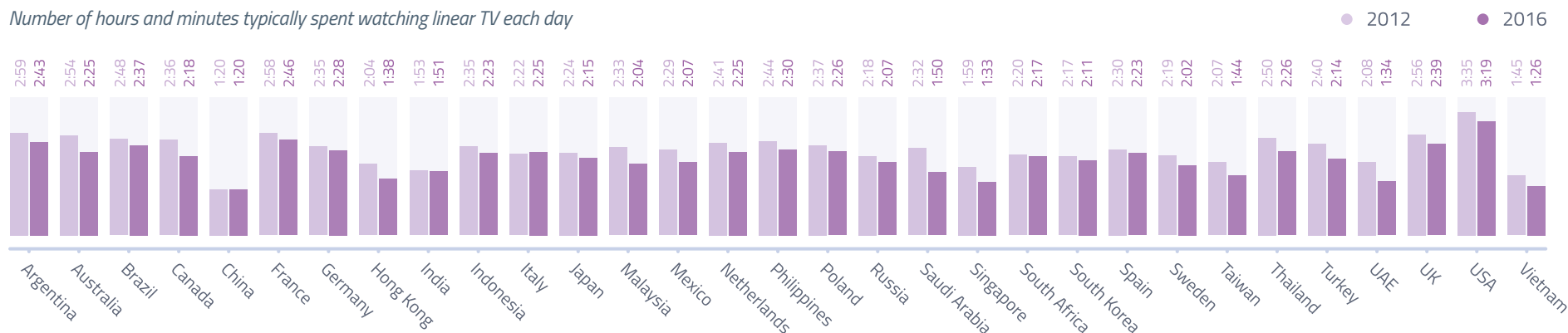
Question: Roughly how many hours do you spend watching television/online forms of television during a typical day?
Source: GlobalWebIndex Q1-Q3 2016 **Base:** Internet Users aged 16-64



PRO Platform:
Media Consumption >
Time Spent Watching Online TV

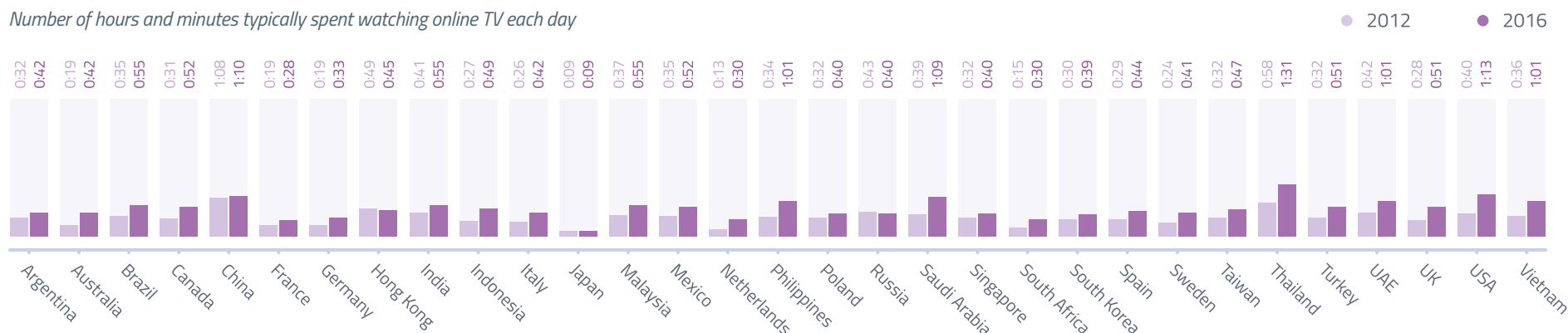
LINEAR TV

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



ONLINE TV / STREAMING

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



Of the 31 markets where we can compare linear TV consumption in 2012 and 2016, daily viewing has declined in 29 of them

(increasing very slightly in Italy, and remaining stable in China).

Across most markets, these declines have been very gentle (less than 15 minutes in 12 of them, and more than 30 minutes in just the UAE and Saudi Arabia). This offers further evidence that linear behaviors are not being cast aside, and it's important to recognize that it remains by far the most important media activity overall.

All this acknowledged, the gradual decline in daily viewing for linear TV is in line with the shift towards online forms of content. A couple of markets buck the trend here by showing a slight decrease in online viewing in 2012 (with Hong Kong and Russia being the only examples) but the prevailing story is one of consistent rises. In fact, there's been over a 70% increase in time spent on online TV in Australia, Germany, the Netherlands, the Philippines, Saudi Arabia, South Africa, the UK and the USA.

EXPLORE THE DATA



Question: Roughly how many hours do you spend watching television/online forms of television during a typical day? **Source:** GlobalWebIndex 2012 & 2016 (averages across each wave of research conducted) **Base:** Internet Users aged 16-64



PRO Platform:
Media Consumption >
Time Spent Watching Online TV

Broadcast vs. Online Radio/Music

Thailand is the biggest listener of online radio/music and is the only market where it is capturing longer than an hour each day. It's also one of the only places (along with Vietnam, India, Saudi Arabia) where internet users are spending longer listening to online radio/music than broadcast radio. The USA is close to hitting the 1 hour per day mark, but broadcast radio still continues to capture 21 minutes longer each day.

In contrast, the top listeners of broadcast radio are generally mature markets – and specifically European. Consumers in Belgium are listening to 3.5x as much broadcast as online radio/music, for example, with the Netherlands, Germany and Poland also featuring prominently. South Africa is the only non-European market to feature in the top 5 markets for broadcast radio.

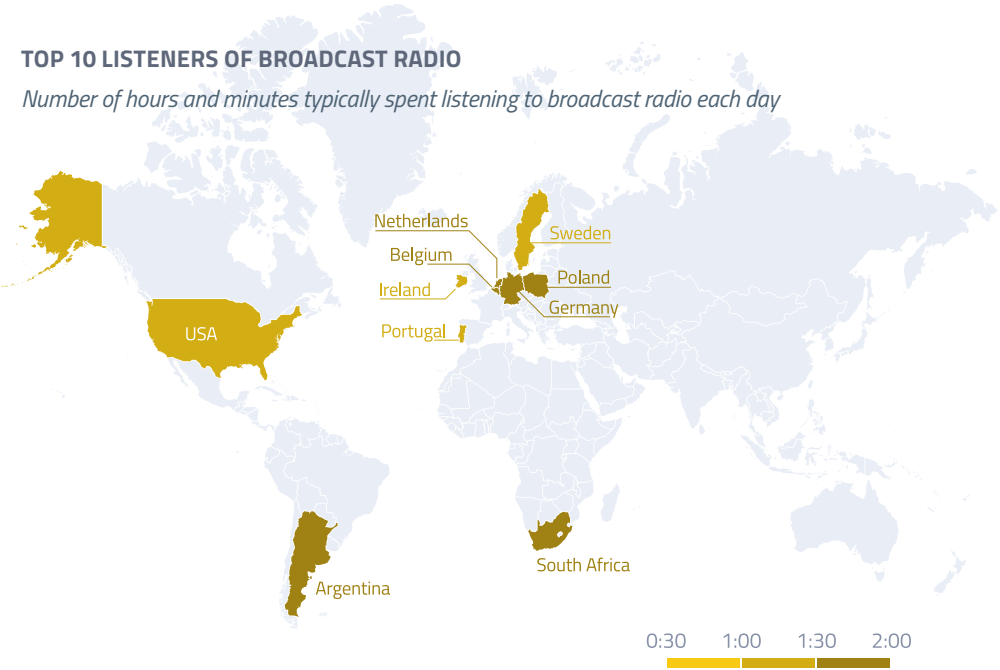
Crucial to note, though, is that **broadcast forms of radio have lost ground in 24 of the 31 markets where we have trended data available** (with South Korea, Thailand, Vietnam and the USA seeing this metric tick upwards very slightly). In the majority of markets, this decline has been very slight (less than 10 minutes in 13 of them). And it's only in Argentina where we see a fall of more than half an hour.

This is different trend to that for linear TV where we see a general decline in linear forms accompanied by consistent rises for online. Here, though, the drops for broadcast radio are not being matched by such a neat or consistent increase for online. The rises for online radio have been very modest in most markets, and there are 9 countries where online radio has actually gone down. So, **while traditional broadcast radio will need to work hard to retain its relevance, it's not always losing out directly to online equivalents.**

RADIO: BROADCAST vs ONLINE

TOP 10 LISTENERS OF BROADCAST RADIO

Number of hours and minutes typically spent listening to broadcast radio each day

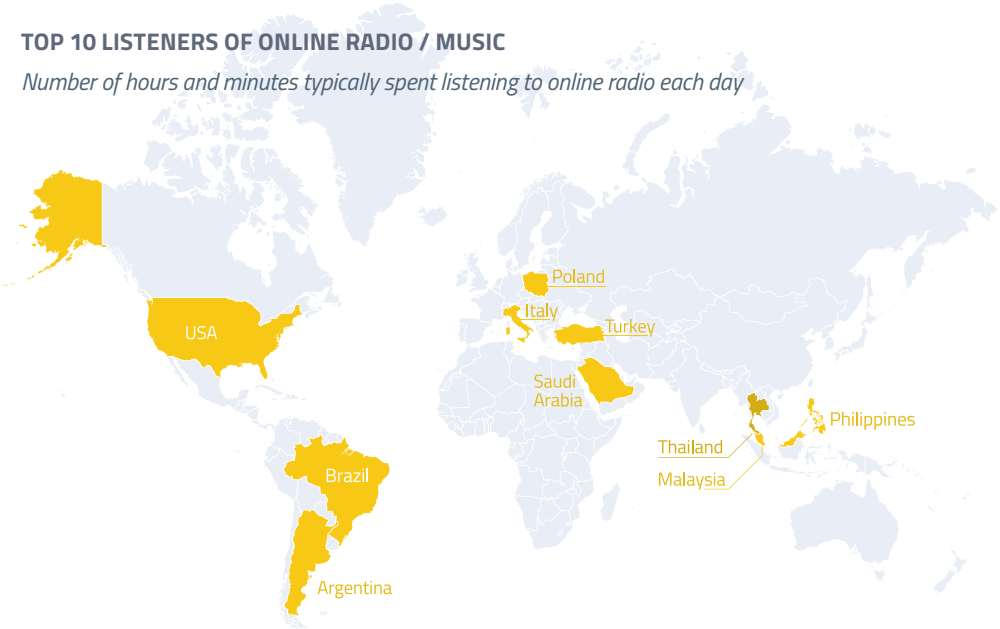


	Brdcst Radio	Difference*
Belgium	01:51	01:19
Netherlands	01:48	01:09
South Africa	01:48	01:19
Poland	01:46	00:56
Germany	01:33	01:01
Argentina	01:30	00:41
USA	01:20	00:20
Ireland	01:17	00:52
Sweden	01:16	00:43
Portugal	01:13	00:30

*Difference Between Broadcast & Online

TOP 10 LISTENERS OF ONLINE RADIO / MUSIC

Number of hours and minutes typically spent listening to online radio each day



	Online Radio	Difference*
Thailand	01:11	-0.15
USA	00:59	00:20
Brazil	00:53	00:15
Saudi Arabia	00:51	-0.08
Argentina	00:49	00:41
Poland	00:49	00:56
Malaysia	00:47	00:16
Turkey	00:45	00:00
Philippines	00:43	00:30
Italy	00:41	00:13

*Difference Between Broadcast & Online

EXPLORE THE DATA



Question: Roughly how many hours do you spend listening to the radio / to online radio each day? **Source:** GlobalWebIndex Q1-Q3 2016 **Base:** Internet Users aged 16-64

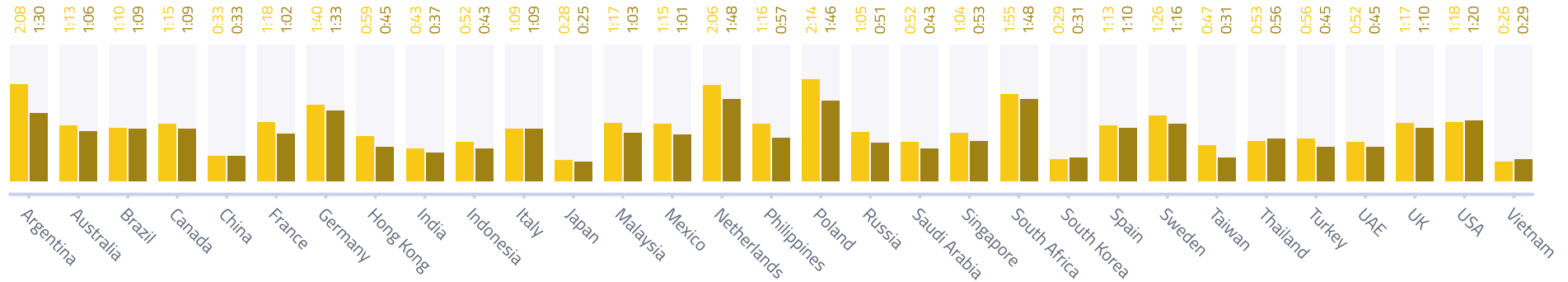


PRO Platform: Media Consumption > Time Spent Listening to Online Radio

BROADCAST RADIO

Number of hours and minutes typically spent listening to broadcast radio each day

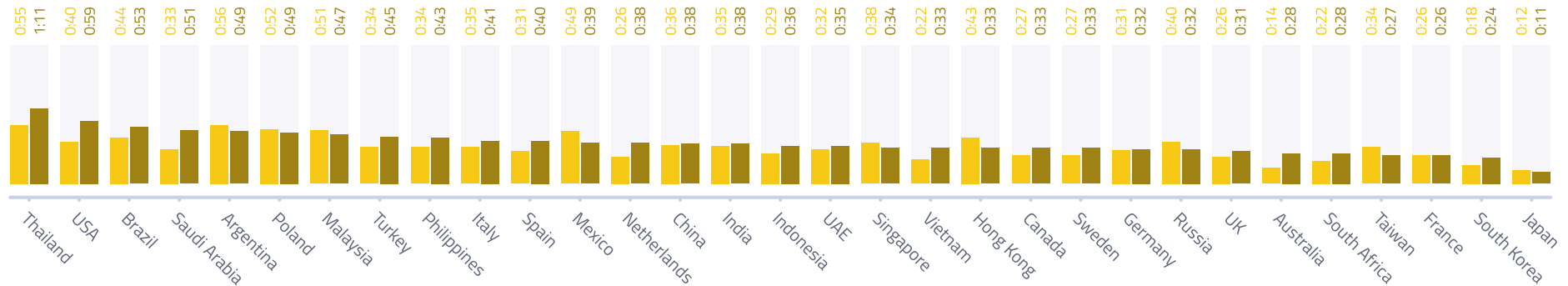
● 2012 ● 2016



ONLINE RADIO / MUSIC

Number of hours and minutes typically spent listening to online radio each day

● 2012 ● 2016



Question: Roughly how many hours do you spend listening to the radio / to online radio each day? **Source:** GlobalWebIndex 2012 & 2016 (averages across each wave of research conducted) **Base:** Internet Users aged 16-64



PRO Platform: Media Consumption
> Time Spent Listening to Online Radio

[EXPLORE THE DATA](#)

Print vs. Online Press

Whereas online forms of television and radio are generally lagging behind their linear counterparts, the opposite is true for press. **In all but two markets, online is now the preferred choice for this type of media.** And even in those markets where print forms retain a lead – Japan and Portugal – the margins are very *narrow*.

Broadly speaking, it's fast-growth markets where online press has made the biggest headway. Brazil marks itself out as the biggest reader of online press – where internet users are spending over an hour longer engaging with online press than printed forms. Thailand then takes a strong second place, followed by Vietnam. **The rise of mobiles has undoubtedly had a positive impact on online press,** with consumers now able to keep up with the news whenever and wherever they please. 4 in 10 internet users report using a news app on their mobiles, for example, with notable peaks in many fast-growth markets.

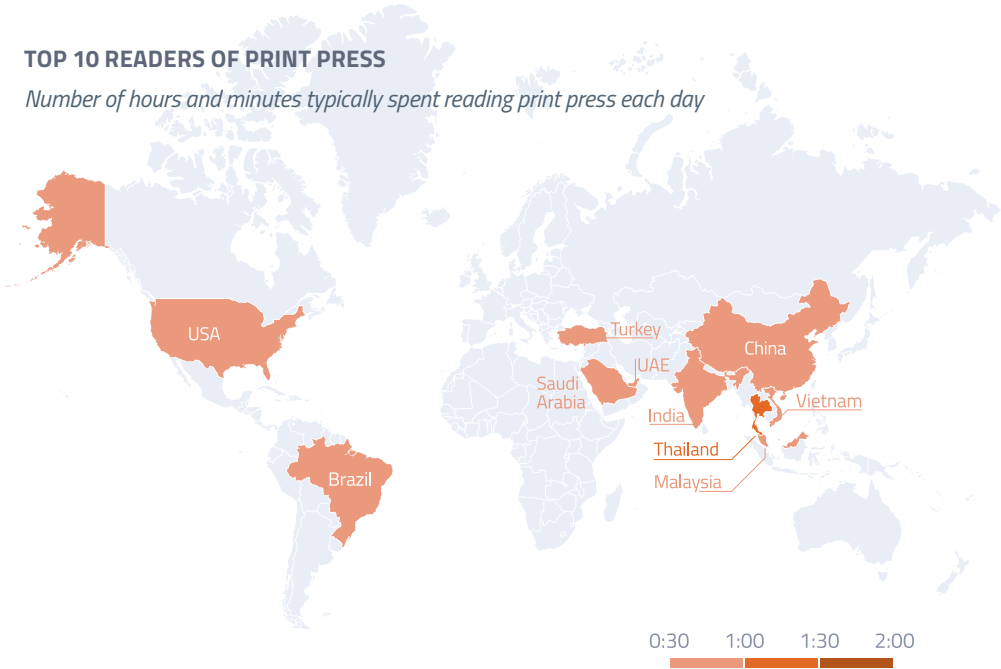
Interestingly, as well as being the second-biggest reader of online press, Thailand takes the first place for print press. This means that consumers here are spending a considerable 2 hours 45 minutes every day reading press – a figure that compares to less than an hour in France and Belgium.

There are just 7 markets where either genre manages to hold the attention of consumers for more than an hour each day (with Thailand the only example for printed press). This shows that **press is now a relatively minor part of daily media consumption behaviors** – at least when it's compared to activities like TV and social networking. That many networks have been working to incorporate news stories within their sites is a key part of this. 40% of online adults now say that they use social networks to stay up-to-date with news/current events, and Twitter in particular has set itself apart as a vital go-to for news updates. In fact, reading a news story is the most popular activity on Twitter among the 20 or so tracked by GWI.

PRESS: PRINT vs ONLINE

TOP 10 READERS OF PRINT PRESS

Number of hours and minutes typically spent reading print press each day

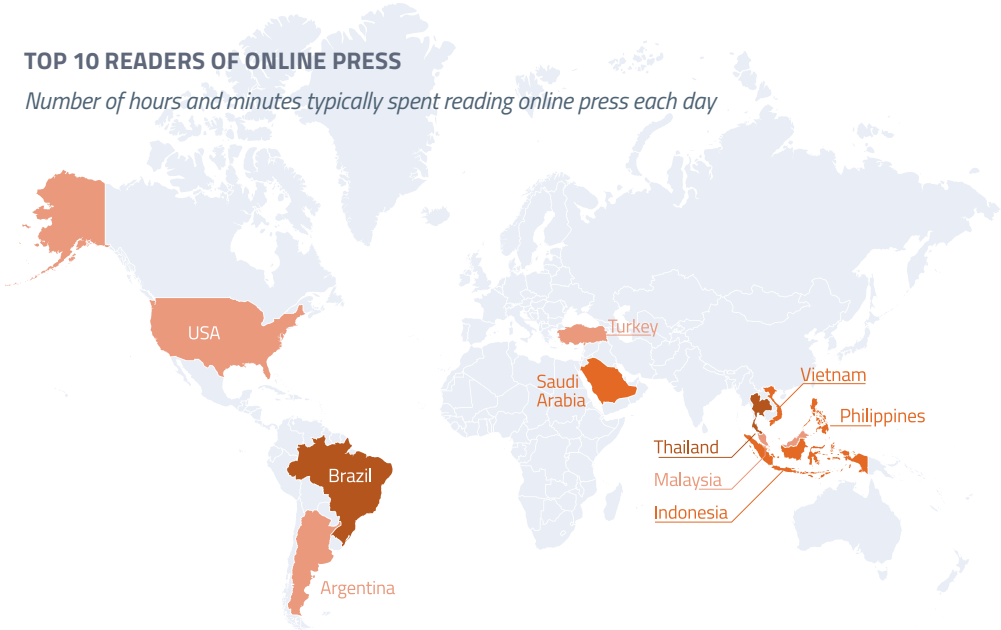


	Print Press	Difference*
Thailand	01:02	-0.41
Brazil	00:46	-1.06
Saudi Arabia	00:45	-0.33
Vietnam	00:45	-0.40
China	00:44	-0.03
Turkey	00:44	-0.12
UAE	00:43	-0.08
USA	00:43	-0.09
India	00:43	-0.07
Malaysia	00:43	-0.12

*Difference Between Print & Online

TOP 10 READERS OF ONLINE PRESS

Number of hours and minutes typically spent reading online press each day



	Online Press	Difference*
Brazil	01:52	-1.06
Thailand	01:43	-0.41
Vietnam	01:25	-0.40
Saudi Arabia	01:18	-0.33
Indonesia	01:12	-0.30
Philippines	01:00	-0.19
Argentina	00:58	-0.29
Turkey	00:56	-0.12
Malaysia	00:55	-0.12
USA	00:52	-0.09

*Difference Between Print & Online

EXPLORE THE DATA



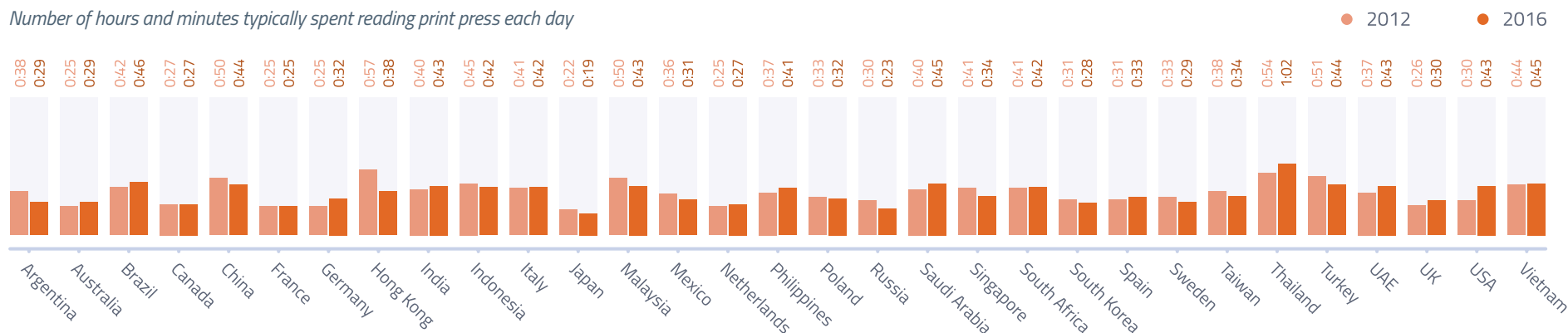
Question: Roughly how many hours do you spend reading physical/printed or online forms of press during a typical day? **Source:** GlobalWebIndex Q1-Q3 2016
Base: Internet Users aged 16-64



PRO Platform:
Media Consumption > Time Spent Reading Online Press

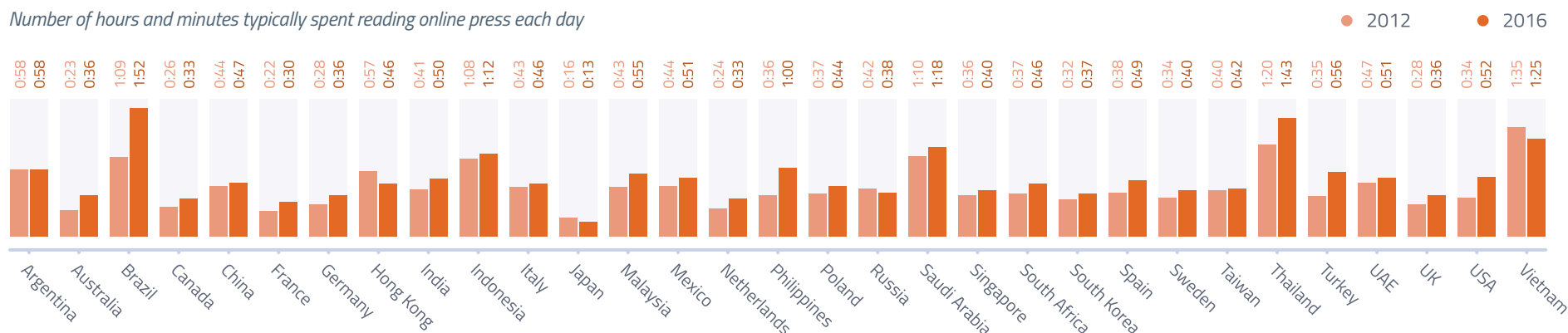
PRINT PRESS

Number of hours and minutes typically spent reading print press each day



ONLINE PRESS

Number of hours and minutes typically spent reading online press each day



Important to note, however, is that **print press has remained pretty stable since 2012**. Although gentle declines have been seen in 15 markets, these have only been a few minutes. Clearly, traditional newspapers and magazines aren't being abandoned yet.

Where we are seeing a more consistent change is in the time spent on online forms of press – a metric which has ticked upwards since 2012 across the majority of the markets where we have trended data available (with just Japan, Hong Kong, Vietnam

and Russia bucking the trend here). Although increases have been less than 10 minutes in most markets, in Brazil (+43 minutes), the Philippines (+24 minutes) and Thailand (+22 minutes) we've seen some fairly notable rises.

EXPLORE THE DATA



Question: Roughly how many hours do you spend reading physical/printed or online forms of press during a typical day? **Source:** GlobalWebIndex 2012 & 2016 (averages across each wave of research conducted) **Base:** Internet Users aged 16-64



PRO Platform:
Media Consumption >
Time Spent Reading Online Press

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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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GWIQ offers clients the ability to create bespoke audiences on the platform by connecting the GWI 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 the PRO 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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