

THE GLOBAL MEDIA INTELLIGENCE REPORT 2020

**A Reference Guide to Consumers'
Media Use in 42 Countries**

OCTOBER 2020

eMarketer Team



THE GLOBAL MEDIA INTELLIGENCE REPORT, 2020

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THE GLOBAL MEDIA INTELLIGENCE REPORT 2020: A REFERENCE GUIDE TO CONSUMERS' MEDIA USE IN 42 COUNTRIES

EXECUTIVE SUMMARY

The Global Media Intelligence Report is a concise yet detailed compilation of data and insights about internet users' traditional and digital media usage in 42 key markets worldwide. This 2020 edition covers the same range of metrics we featured in 2019, and the consistency of GlobalWebIndex's methodology enables us to offer precise year-over-year comparisons; these provide vital indicators of exactly where and how quickly changes are happening, and where behaviors haven't altered much.

In fact, one of the more surprising findings this year was that many aspects of device ownership and engagement with specific media changed little, or not at all, in a number of countries. We might have expected the coronavirus pandemic to radically alter media behavior, but that didn't happen for the most part. Time spent with TV, digital video, and music streaming did rise among most populations polled, but these increases were often incremental, and not traceable entirely to periods of national lockdown, for example.

Here are the key trends shaping the media landscape this year:

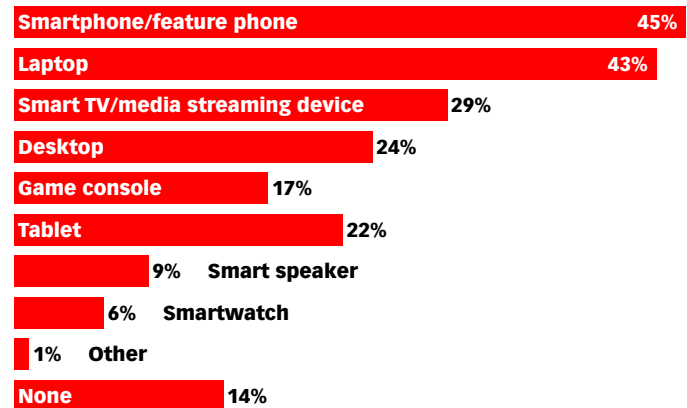
Ownership of PCs and/or tablets continues to fall in many countries. Smartphones are already the primary—and sometimes only—digital device that many internet users worldwide owned. As advanced handsets continue to consolidate that position, larger-screen devices may appear destined for a secondary role.

Between H1 2019 and H1 2020, ownership of desktops, laptops, and/or tablets declined most sharply in developing markets, including Brazil, China, Egypt, and India—all countries where the focus has long been on mobile devices and services. But the same trend appeared to a lesser degree in several other countries too, including France, Russia, Sweden, and the US.

That said, PC and tablet penetration remains consistently higher among older, affluent internet users—a top target audience for many marketers. In addition, many consumers have spent more time with PCs since the pandemic began. In the US, for example, 43% of internet users polled by GlobalWebIndex in May 2020 said their laptop time had increased, and 24% were spending more time on a desktop.

Devices US Internet Users Have Been Spending More Time Using Since the Coronavirus Pandemic, May 2020

% of respondents



Note: ages 16-64

Source: GlobalWebIndex, "Coronavirus Research: Multi-Market Research Wave 4," June 2, 2020

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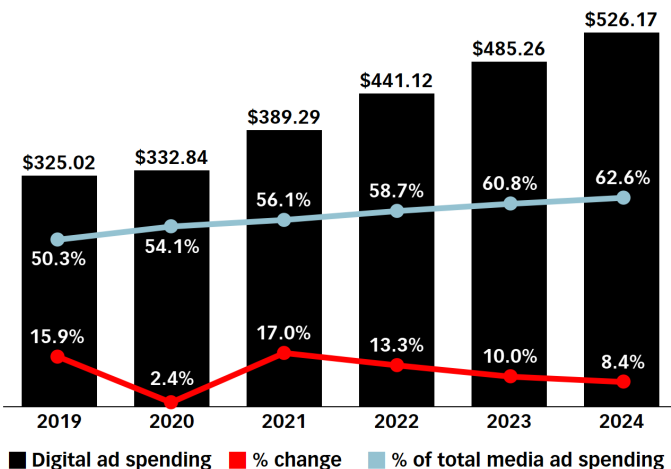
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As a result, advertising on desktops and laptops will still contribute significantly to digital ad spending overall. And digital ad spending—unlike outlays on traditional media—is set to climb this year despite the massive market impact of the pandemic. eMarketer estimates that digital ad spending worldwide will rise 2.4% this year to \$332.84 billion and make up 54.1% of total media ad spending.



Digital Ad Spending Worldwide, 2019-2024

billions, % change and % of total media ad spending



Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other internet-connected devices; includes classifieds, display (banners/static display, rich media, sponsorships and video, including advertising that appears before, during or after digital video content in a video player), search (paid listings, contextual text links and paid inclusion), in-game advertising, newsletter advertising and email

Source: eMarketer, June 2020

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Digital video continues to close the gap with broadcast TV.

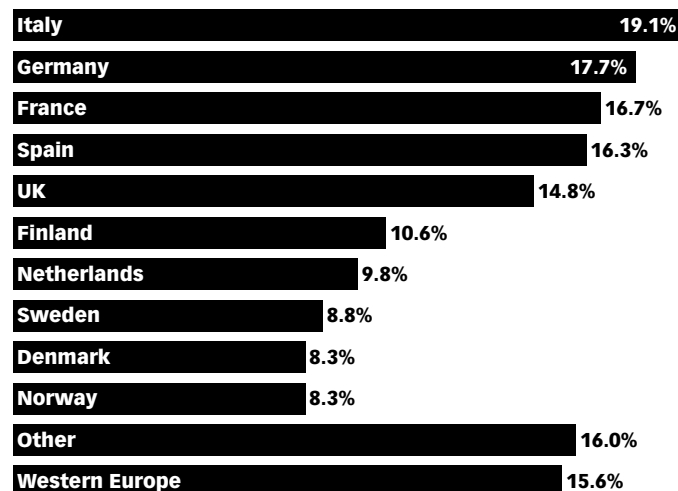
As in 2019, TV still reaches more consumers worldwide than any other content-based medium. But in many parts of the world, the share of internet users watching digital video, either free or paid-for, now equals or surpasses the share watching live TV. In particular, GlobalWebIndex found sizable increases in penetration of subscription video-on-demand (SVOD) in many markets YoY. Those were likely due in part to expanded offerings from Netflix and other providers, but SVOD also seems to have benefited from consumers' desire for quality entertainment while stuck at home.

For example, 86.2% of internet users in Brazil polled in H1 2020 had watched SVOD content in the prior month—not far behind the 89.8% who had watched live TV, and effectively double the 43.2% who had watched a TV channel's catch-up service. In Mexico, more than 90% had watched SVOD, while 88.9% had watched live TV. In New Zealand and the US, the percentages of respondents viewing live TV and SVOD were almost the same.

Such figures confirm eMarketer's forecast for steady growth in subscription video viewing. For instance, we expect the number of people in Western Europe who use subscription over-the-top (OTT) video services to jump 15.6% this year—with even greater gains in the EU-4 countries. In North America, Netflix alone is forecast to have more than 185 million users in 2020.

Subscription OTT Video Service User Growth in Western Europe, by Country, 2020

% change vs. prior year



Note: individuals of any age who watch video via any app or website at least once per month that provides paid subscription access to streaming video content over the internet and bypasses traditional distribution; examples include Amazon Prime Video, HBO Now, Hulu, Netflix, Sling TV, and YouTube Premium; OTT video services are not mutually exclusive; includes overlap between video services

Source: eMarketer, Sep 2020

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While digital video viewing is advancing by leaps and bounds, many digital devices and services have seen only modest takeup, and that may be stalling.

In 2019, the vast majority of internet users polled didn't own a smartwatch or a smart wristband; this year, the picture is much the same. Similarly, penetration of virtual reality (VR) headsets was below 5% of survey respondents in all but a handful of countries; those included India, Mexico, Saudi Arabia, and Turkey.

To date, smart home devices, such as household energy monitors or security systems linked to mobile apps, aren't a priority purchase either—though increased remote working may change that dynamic if the pandemic continues. In many countries, penetration of smart home devices remained well below 10% this year. Some posted significant gains—21.0% of internet users polled in the UK had a smart home product in H1 2020, for example—yet ownership dropped in several cases. It seems that smart home devices may never reach the mainstream in many markets, and ownership may be concentrated largely among affluent individuals.

Ownership of Smart Home Devices in Select Countries, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
UK	16.5%	21.0%
US	17.1%	18.9%
Canada	12.6%	18.3%
China	15.7%	13.5%
India	11.9%	11.8%
Mexico	8.8%	10.4%
South Korea	8.9%	9.6%
France	8.0%	9.5%
Germany	7.8%	9.2%
United Arab Emirates	9.6%	7.8%
Brazil	4.6%	4.4%
Russia	2.9%	2.9%

Note: respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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The pandemic is likely accelerating the decline of print media.

While print audiences aren't shrinking everywhere, print newspapers and magazines did register many of the most dramatic decreases in media engagement this year. In South Africa, for example, the share of internet users who'd read a print newspaper in the month prior to polling fell almost 10 percentage points, and magazine penetration plunged 17 percentage points. Significant drops were also seen in Colombia, Hong Kong, and Romania, among others.

There's no doubt that the pandemic is further complicating an already complex picture. And while penetration of many digital devices and behaviors is stabilizing around the world, many details vary across the 42 markets monitored by GlobalWebIndex. Some examples:

- Time spent with social media is rising in many countries—but not all. One might have expected major increases across the board, as consumers used social platforms to communicate with friends, family, and colleagues during enforced stay-at-home orders arising from the pandemic. Social time did climb YoY in several countries, including France, Portugal, and India. But these increases were often small. Moreover, time spent with social actually fell in Brazil, Canada, China, Egypt, and the Philippines, to name a few.

- In many advanced economies—including Germany, Sweden, Spain, the UK, and the US—time spent with PCs and tablets still exceeds time spent with mobile devices, and by a large margin. By contrast, mobile activity dominates in many Asia-Pacific nations, including China, Malaysia, and Thailand. Yet several countries in Asia-Pacific buck that trend; in Japan, New Zealand, and Singapore, PC time remains greater than mobile time.
- Smart TVs are well established in most countries with robust, reliable communications networks. More than four in 10 internet users polled in North America, Latin America, and Western Europe said they owned a smart TV in H1 2020, though France was below that threshold. Respondents in Africa, Asia-Pacific, and the Middle East were less likely to have such a device, however; in Japan, a mere 7.5% owned one this year.
- Voice search is solidly popular in some countries, but less so in others. GlobalWebIndex first asked survey respondents in 2019 about their use of voice-activated smartphone assistants like Apple's Siri and Microsoft's Cortana, and smart speakers, such as the Google Home and Amazon Echo. This year, several countries—including France, India, Saudi Arabia, and the US—posted markedly greater usage; many others—including Italy, Malaysia, and the UK—saw minimal or no growth. And in some countries—including Ireland, Japan, and Vietnam—voice search was less widespread than last year. Researchers also reported some notable age- and gender-related shifts in voice search.

This is just a small sampling of the granular detail that GlobalWebIndex data provides. Seen in conjunction with regional and worldwide trends, this wealth of information about the digital citizens of 42 countries should help advertisers and marketers to develop and execute the campaigns they need to be successful in a world changing more rapidly than ever.

WELCOME TO EMARKETER'S GLOBAL MEDIA INTELLIGENCE REPORT 2020.

About This Report

The 10th edition of the Global Media Intelligence Report is a continued partnership with Starcom and collaboration with GlobalWebIndex. We are committed to providing consistent representation of topics, demographic groups, and time frame from the 2019 edition. We once again turned to GlobalWebIndex—a primary research provider to Starcom and a valued partner of eMarketer—to achieve this goal.

The ongoing quarterly survey among internet users in 42 markets worldwide is the hallmark of GlobalWebIndex. On behalf of Starcom's parent company, Publicis Media, GlobalWebIndex includes additional survey questions across their panel. This culmination of consistent and transparent multimarket methodology engenders trust in the global data.

Charts in the Global Media Intelligence Report include the questions posed by GlobalWebIndex to the respondents and related, localized details.

GlobalWebIndex Methodology Statement

GlobalWebIndex runs a quarterly research program, asking internet users ages 16 to 64 in more than 40 countries a range of questions about their digital lives and lifestyles. The minimum sample size per quarter, per country is 1,250; bigger markets have larger quarterly sample sizes, with the maximum being 25,000 in China and the US. Respondents can only participate in GlobalWebIndex's research once per year.

The survey is designed to cover attitudes, perceptions, and actual behaviors. All data is self-reported and therefore, the answers are from the respondent's perspective rather than any passively observed metrics. For questions such as time spent with specific media, respondents are asked to select a time estimate from a list rather than entering a precise figure; all answers are then aggregated to produce an average time.

The results presented in this report are drawn from questions fielded in two different surveys running concurrently. The first is a short survey offered via mobile; it contains a key set of 50 questions and reaches mobile-only respondents (who tend to be younger, less affluent, and concentrated in emerging markets). The second is a longer survey offered via PC, laptop, tablet, or mobile; this longer survey contains all the same questions asked in the shorter mobile survey together with a wide range of additional ones.

Within each survey, questions are routed and filtered to ensure a respondent only sees relevant queries. Similarly, some sections of the longer survey are shown to representative subsections of the full sample to avoid overburdening them. As a result, the total sample that sees each question will vary; some questions will have been answered by all respondents across the shorter and longer surveys, whereas others will only have been answered by respondents taking part in the longer survey (or by a subsection of these respondents). For every question, GlobalWebIndex nevertheless ensures a robust and representative sample.

The final data set is weighted to interlocking age, gender, and education quotas, which reflect each country's internet population. Note that GlobalWebIndex only interviews and represents internet users ages 16 to 64 in each country—not its total population. In countries with a high internet penetration (including in North America, Australia, and much of Europe), online samples will have an age, gender, and education profile that closely resembles that of the general/total population. Conversely, low internet penetration countries (including in Latin America and large parts of the Middle East and Africa and Asia-Pacific) will have online samples containing proportionally higher levels of young, urban, and educated individuals, reflecting the nature of internet usage in those countries. In some markets in the Middle East and Africa and Asia-Pacific, there will also be a gender skew toward males, in line with their increased likelihood to be internet users.

As this research is conducted via mobile and desktop platforms, all questions and answer options are presented in the respondent's local language; in multilingual countries, they can choose the language in which they wish to complete the survey at the outset.



KEY FEATURES

The appeal of traditional media is weakening in Argentina.

- Argentina was already suffering a third year of recession before the coronavirus arrived. The pandemic further aggravated the problems faced by consumers and businesses across the country, yet none of these factors seem to have caused major changes in media behaviors.
- Print media continues to lose audiences to digital alternatives. Between Q1 2019 and Q1 2020, the percentage of internet users in Argentina ages 16 to 64 who had read a print magazine in the prior month fell 8.7 percentage points, to 39.8%, according to GlobalWebIndex and Publicis Media. Readership of print newspapers declined 5.4 percentage points, to 46.8%.
- Radio has maintained greater reach—68.6% of survey respondents had recently listened to broadcast radio programs. That was 3.6 percentage points lower than in Q1 2019, but it's worth noting that radio may have regained some listeners in late spring this year, as consumers sought up-to-the-minute information on the pandemic.

Entertainment is a main driver of greater digital engagement and time spent.

- The most dramatic changes in media consumption this year relate to subscription video-on-demand (SVOD) and digital audio. In H1 2020, 86.3% of internet users in Argentina had watched SVOD services in the month prior to polling. During the same period, the share who streamed music, listened to podcasts, or streamed other online audio content rose to 78.9%.
- TV viewership slipped year over year, though only marginally, to 92.9% of internet users polled. Usage of TV broadcasters' catch-up services, at 62.0%, appears to have plateaued or even declined slightly since H1 2019. Similarly, the share of internet users viewing TV shows they recorded earlier barely shifted, from 41.7% to 40.6%.

- Not surprisingly, time spent with digital audio and video is up. For example, internet users polled in Argentina spent an average of 1 hour, 12 minutes (1:12) daily with online TV in H1 2020—10 minutes more than in H1 2019. However, time devoted to broadcast TV was also up by 5 minutes per day, to 2:28.

Penetration of smartphones is now highest among older age groups, but most of the device landscape in Argentina has changed only slightly from last year.

- Smart TV ownership was already high in Argentina in H1 2019 and remained essentially unchanged in H1 2020, at 58.4% of internet users. Intriguingly, penetration rose sharply among 16- to 24-year-olds but fell among all older groups.
- In H1 2020, 97.3% of internet users ages 16 to 64 owned a smartphone, compared with 97.1% a year prior. Much of this minimal increase is attributable to older cohorts. This year, those ages 45 to 54 posted the highest ownership, at 98.6%.
- Fully 78.9% of internet users polled owned a desktop/laptop, a marginally larger share than in H1 2019. Males were more likely to own a PC, at 81.7%; among females, penetration was 75.9%. In addition, ownership still correlated directly with rising age and affluence—89.5% of respondents ages 55 to 64 owned a desktop or laptop, as did 84.3% of respondents in high-income households. Yet 75.6% of individuals in low-income households were also PC owners.
- In H1 2020, internet users spent an average of 4:48 each day with mobile devices—a half-hour more than the 4:19 spent with desktops/laptops and tablets.
- Some digital devices are losing fans, however. Tablet ownership, which increased slightly in Argentina in 2019, was down in H1 2020, from 43.7% to 39.4%. Penetration was highest among internet users ages 35 to 44, at 48.4%. Additionally, fewer than one-third (32.2%) of respondents owned a game console in H1 2020, a decline of 3.4 percentage points compared with H1 2019. Even among males, ownership slipped from 41.2% in H1 2019 to 38.5% this year.

- Some advanced digital devices haven't gained much momentum. In H1 2020, only 7.9% of Argentina's internet users owned smart home devices, such as web-enabled energy monitors. Just 7.8% owned a smartwatch. Similarly, penetration of smart wristbands was greater than in 2019 but still very low at 4.1%.

Device Ownership in Argentina, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	97.1%	97.3%
Desktop/laptop	78.3%	78.9%
Smart TV	59.0%	58.4%
Tablet	43.7%	39.4%
Game console	35.6%	32.2%
TV streaming stick/device	14.7%	15.8%
Feature phone	13.5%	12.3%
Smart home device	7.4%	7.9%
Smartwatch	6.9%	7.8%
VR headset/device	4.7%	4.2%
Smart wristband	2.8%	4.1%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smartphone and Tablet Owners in Argentina, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	97.4%	97.3%	45.1%	40.0%
Male	96.8%	97.4%	42.4%	38.8%
Age				
16-24	98.2%	97.6%	32.4%	30.1%
25-34	97.4%	97.9%	46.0%	38.8%
35-44	97.4%	97.6%	50.4%	48.4%
45-54	96.8%	98.6%	46.1%	42.6%
55-64*	-	-	-	-
Annual household income group				
High	97.5%	98.8%	55.0%	49.7%
Medium	98.5%	98.5%	49.1%	45.1%
Low	96.9%	95.4%	37.7%	29.4%
N/A**	95.0%	96.2%	31.2%	27.2%
Household location				
Urban	97.3%	97.4%	45.4%	41.5%
Suburban	96.7%	97.2%	37.3%	32.3%
Rural*	-	-	-	-
Total	97.1%	97.3%	43.7%	39.4%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smart TV Owners in Argentina, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	56.3%	56.4%
Male	61.7%	60.3%
Age		
16-24	49.4%	56.9%
25-34	60.7%	57.8%
35-44	64.5%	61.2%
45-54	64.7%	59.9%
55-64*	-	-
Annual household income group		
High	73.9%	72.6%
Medium	66.4%	63.0%
Low	49.2%	48.2%
N/A**	44.5%	45.8%
Household location		
Urban	60.9%	59.7%
Suburban	53.7%	54.8%
Rural*	-	-
Total	59.0%	58.4%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

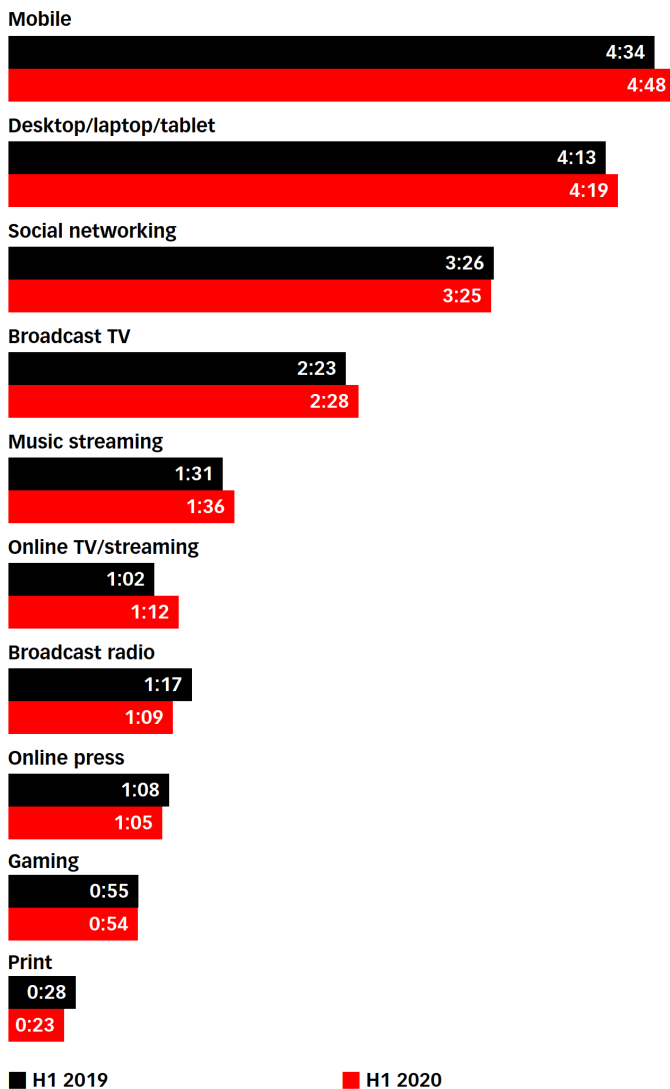
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Average Time Spent with Media in Argentina, H1 2019 & H1 2020

hrs:mins per day among internet users

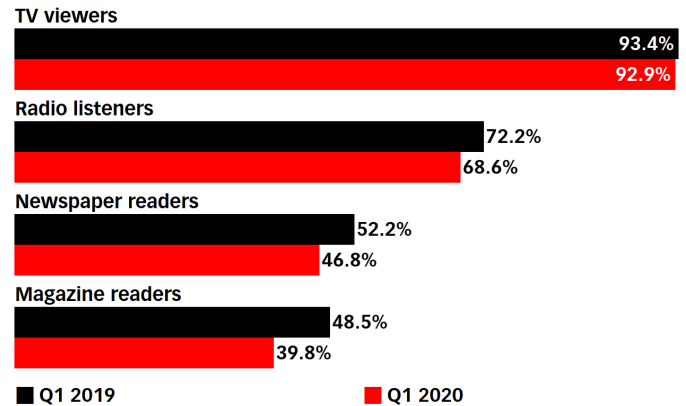


Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Traditional Media Users in Argentina, Q1 2019 & Q1 2020 % of internet users



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

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Traditional Media Users in Argentina, Q1 2020 % of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	40.5%	42.9%	66.1%	94.4%
Male	39.1%	50.7%	71.1%	91.4%
Age				
16-24	29.9%	35.7%	48.1%	93.0%
25-34	42.4%	46.8%	63.0%	89.8%
35-44	44.8%	54.5%	79.5%	94.0%
45-54	51.5%	59.5%	87.8%	96.2%
55-64*	-	-	-	-
Annual household income group				
High	36.9%	48.3%	77.1%	95.5%
Medium	45.3%	51.4%	67.6%	93.0%
Low	43.8%	49.3%	63.7%	90.7%
N/A**	33.1%	35.3%	60.6%	90.7%
Household location				
Urban	40.9%	49.9%	68.8%	94.1%
Suburban	34.0%	32.6%	68.4%	87.4%
Rural*	-	-	-	-
Total	39.8%	46.8%	68.6%	92.9%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

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TV Viewers in Argentina, by Method, H1 2020

% of internet users

Broadcast live on TV channel

86.9%

SVOD*

86.3%

TV channel's catch-up/on-demand service

62.0%

Recorded from TV

40.6%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20589

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Video-on-Demand (VOD) Viewers in Argentina, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	92.8%	92.0%
Male	88.5%	90.4%
Age		
16-24	93.0%	93.5%
25-34	93.8%	96.2%
35-44	92.8%	93.2%
45-54	89.4%	82.2%
55-64*	-	-
Annual household income group		
High	94.0%	92.8%
Medium	92.7%	92.1%
Low	88.8%	88.4%
N/A**	83.8%	89.0%
Household location		
Urban	91.9%	92.4%
Suburban	85.4%	86.8%
Rural*	-	-
Total	90.7%	91.2%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20590

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Social Media Users in Argentina, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	89.2%	92.0%
Male	88.9%	90.5%
Age		
16-24	90.6%	93.1%
25-34	90.9%	90.9%
35-44	89.7%	92.2%
45-54	87.5%	90.4%
55-64*	-	-
Annual household income group		
High	87.9%	89.4%
Medium	89.9%	92.6%
Low	91.3%	93.5%
N/A**	85.6%	88.4%
Household location		
Urban	89.0%	90.9%
Suburban	88.9%	92.2%
Rural*	-	-
Total	89.0%	91.2%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Taringa!, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20586

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Digital Audio Listeners in Argentina, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	75.2%	78.1%
Male	75.5%	79.7%
Age		
16-24	87.8%	86.5%
25-34	80.9%	84.4%
35-44	72.0%	78.0%
45-54	62.3%	70.2%
55-64*	-	-
Annual household income group		
High	79.4%	79.6%
Medium	73.7%	80.9%
Low	77.6%	79.4%
N/A**	68.7%	71.2%
Household location		
Urban	76.3%	79.7%
Suburban	69.0%	75.5%
Rural*	-	-
Total	75.4%	78.9%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20591

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Voice Search Users in Argentina, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	26.5%	29.9%
Male	30.6%	32.3%
Age		
16-24	33.3%	38.8%
25-34	33.0%	35.2%
35-44	28.1%	28.0%
45-54	21.3%	23.8%
55-64*	-	-
Annual household income group		
High	33.5%	30.7%
Medium	27.8%	31.1%
Low	30.2%	35.0%
N/A**	21.1%	25.7%
Household location		
Urban	28.9%	31.5%
Suburban	26.9%	29.6%
Rural*	-	-
Total	28.6%	31.2%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20592

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AUSTRALIA

KEY FEATURES

Internet users in Australia are fully on board with the digital video revolution.

- In early 2019, consumption of linear TV significantly outpaced online TV and video viewing among internet users in Australia. Now the emphasis is shifting. In H1 2020, 83.5% of respondents ages 16 to 64 had watched linear TV in the month prior to polling, while 84.7% had streamed video-on-demand (VOD) content, according to GlobalWebIndex.
- In addition, 74.7% of internet users had watched subscription VOD (SVOD) services like Netflix and Hulu—a rise of 5.9 percentage points since H1 2019, and the biggest increase in any behavior tracked by GlobalWebIndex in Australia this year.
- Viewing of TV broadcasters' catch-up and on-demand services also rose, from 60.0% to 64.3% of internet users.
- Income still makes a difference in VOD penetration, though usage had increased across all demographics. Some 88.2% of individuals in high-income households were VOD viewers in H1 2020, compared with 80.9% of those in low-income households.
- Age remains a major determining factor, too. As in previous years, younger internet users were the keenest VOD viewers. In H1 2020, 96.4% of respondents ages 16 to 24 had watched VOD services in the prior month, versus 66.2% of those ages 55 to 64, a 30 percentage-point difference. Such variations were even more marked among SVOD viewers—93.8% of internet users ages 16 to 24 viewed SVOD content in the month prior to polling, but barely half (50.9%) of those 55 to 64 did the same.
- The opposite pattern applied to TV viewing. Among internet users ages 45 to 64, more than 96% had watched TV in the month before polling, compared with about 90% of respondents 25 to 44 and 81.2% of those ages 16 to 24.

- Consumption of digital audio was also much more common among younger respondents in H1 2020. The share of internet users listening to streaming music, podcasts, or other digital audio content fell more than 10 percentage points with each decade of increasing age.
- Growing digital activity is slowly reshaping the device landscape. In keeping with the surge in digital video, smart TV ownership increased to 48.1% of internet users ages 16 to 64, versus 43.6% in H1 2019. For the first time, more than 50% of respondents ages 35 to 64 owned a smart TV. Several other digital devices posted modest gains as well. Nearly 13% of internet users said they owned a smart home device in H1 2020, including one in 10 of the most senior age group. Smartwatch ownership climbed to 14.4% overall—though penetration among respondents ages 16 to 24 was double that of those 55 to 64.
- Overall usage of voice command tools such as Siri, Cortana, and smart speakers rose to 30.7% in H1 2020. Here too, young people were most likely to take up the option.
- Even smartphone ownership was somewhat more widespread in H1 2020 than the year prior, at 95.9%. By contrast, some devices are gradually losing appeal. Tablet ownership fell to 50.2% in H1 2020, and some 79.8% of internet users polled this year owned a desktop/laptop, a notable decline from 83.4% in H1 2019. Constant improvements in mobile devices and services are contributing to this erosion of PC usage.
- Internet users spent an average of 3 hours, 31 minutes (3:31) with PCs and tablets per day in H1 2020—substantially more than any other single activity, including mobile (2:32) and broadcast TV (2:12). Traditional media faces major challenges but retains a loyal following among older individuals and affluents.
- In all cases, respondents ages 45 and older were more likely to engage with traditional media.
- The print newspaper audience declined to 48.5% of internet users. By contrast, 78.6% of respondents had listened to broadcast radio in the prior month—a tiny increase from 2019—and magazine readership also rose marginally, to 42.5% overall.

- More broadly, nearly all devices and media behaviors tracked by GlobalWebIndex were more prominent in higher-income homes. Feature phone ownership—making up only 3.7% of Australia's internet users—was one exception to this. Smartphones were another, though for the opposite reason: They are now effectively universal.

Device Ownership in Australia, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	94.5%	95.9%
Desktop/laptop	83.4%	79.8%
Tablet	52.8%	50.2%
Smart TV	43.6%	48.1%
Game console	36.0%	34.4%
TV streaming stick/device	21.4%	22.7%
Smartwatch	11.1%	14.4%
Smart home device	10.3%	12.9%
Smart wristband	10.0%	11.1%
VR headset/device	4.2%	4.1%
Feature phone	4.4%	3.7%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20594

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Smartphone and Tablet Owners in Australia, H1 2019 & H1 2020 % of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	95.6%	96.9%	56.2%	52.8%
Male	93.4%	95.0%	49.5%	47.6%
Age				
16-24	96.2%	96.0%	43.6%	38.4%
25-34	96.6%	96.1%	50.5%	48.6%
35-44	96.3%	96.9%	60.1%	54.7%
45-54	93.5%	96.6%	58.2%	56.3%
55-64	88.1%	93.4%	52.1%	54.4%
Annual household income group				
High	96.6%	96.5%	61.7%	58.0%
Medium	94.8%	97.0%	54.2%	52.6%
Low	92.3%	93.7%	44.3%	42.0%
N/A*	93.8%	96.0%	48.6%	45.3%
Household location				
Urban	93.3%	94.6%	47.1%	45.9%
Suburban	95.1%	96.6%	54.3%	51.2%
Rural	93.4%	95.1%	55.1%	53.8%
Total	94.5%	95.9%	52.8%	50.2%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20598

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Smart TV Owners in Australia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	43.5%	48.2%
Male	43.6%	48.0%
Age		
16-24	34.7%	38.3%
25-34	45.3%	48.7%
35-44	48.0%	51.6%
45-54	46.6%	50.3%
55-64	43.1%	52.4%
Annual household income group		
High	53.4%	57.7%
Medium	44.7%	49.8%
Low	35.1%	38.1%
N/A*	37.6%	42.6%
Household location		
Urban	43.7%	44.7%
Suburban	43.9%	49.8%
Rural	41.7%	45.7%
Total	43.6%	48.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20597

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Average Time Spent with Media in Australia, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Social networking



Broadcast TV



Music streaming



Online TV/streaming



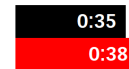
Broadcast radio



Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20593

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Traditional Media Users in Australia, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20600

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Traditional Media Users in Australia, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	42.4%	44.1%	79.9%	92.9%
Male	42.7%	52.9%	77.3%	88.5%
Age				
16-24	34.9%	38.3%	70.2%	81.2%
25-34	37.9%	43.9%	74.3%	89.4%
35-44	40.9%	49.6%	79.4%	90.3%
45-54	46.9%	54.3%	86.0%	96.7%
55-64	56.0%	60.1%	85.4%	97.9%
Annual household income group				
High	48.3%	53.8%	85.8%	93.1%
Medium	41.3%	50.3%	80.1%	90.8%
Low	39.1%	44.1%	68.7%	87.9%
N/A*	37.7%	38.4%	76.9%	90.0%
Household location				
Urban	45.8%	52.7%	75.5%	88.0%
Suburban	40.9%	47.1%	79.5%	91.4%
Rural	45.2%	48.7%	79.3%	92.3%
Total	42.5%	48.5%	78.6%	90.7%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20601

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TV Viewers in Australia, by Method, H1 2020

% of internet users

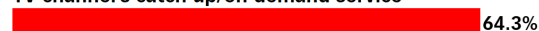
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20602

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Australia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	81.7%	84.8%
Male	79.0%	84.6%
Age		
16-24	92.8%	96.4%
25-34	88.8%	91.8%
35-44	78.8%	85.4%
45-54	72.4%	78.2%
55-64	63.6%	66.2%
Annual household income group		
High	84.4%	88.2%
Medium	81.1%	85.3%
Low	76.3%	80.9%
N/A*	77.6%	83.5%
Household location		
Urban	83.1%	88.7%
Suburban	80.4%	84.4%
Rural	75.5%	78.4%
Total	80.3%	84.7%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20603

www.eMarketer.com

Social Media Users in Australia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	83.0%	85.1%
Male	78.2%	84.0%
Age		
16-24	85.0%	89.1%
25-34	85.5%	87.6%
35-44	83.1%	84.9%
45-54	76.3%	81.4%
55-64	69.8%	77.6%
Annual household income group		
High	83.6%	85.6%
Medium	81.0%	84.1%
Low	78.6%	83.3%
N/A*	77.0%	82.9%
Household location		
Urban	81.9%	85.2%
Suburban	80.3%	84.5%
Rural	79.6%	83.6%
Total	80.6%	84.5%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20599

www.eMarketer.com

Digital Audio Listeners in Australia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	64.9%	67.2%
Male	66.6%	68.7%
Age		
16-24	87.7%	91.6%
25-34	79.2%	80.1%
35-44	65.6%	66.5%
45-54	51.6%	54.6%
55-64	35.3%	38.3%
Annual household income group		
High	70.5%	72.2%
Medium	67.1%	65.2%
Low	58.9%	66.9%
N/A*	66.4%	67.2%
Household location		
Urban	74.9%	74.9%
Suburban	63.8%	67.0%
Rural	60.3%	59.5%
Total	65.7%	67.9%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iHeartRadio, iTunes, Musify, SoundCloud, Spotify, Tidal, YouTube Music and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20595

www.eMarketer.com

Voice Search Users in Australia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	24.2%	27.8%
Male	31.0%	33.5%
Age		
16-24	41.0%	45.0%
25-34	32.3%	33.1%
35-44	27.0%	33.1%
45-54	20.9%	21.7%
55-64	13.5%	16.3%
Annual household income group		
High	29.5%	33.0%
Medium	28.7%	29.9%
Low	24.9%	31.2%
N/A*	26.3%	27.6%
Household location		
Urban	35.6%	38.8%
Suburban	25.9%	28.9%
Rural	22.7%	23.7%
Total	27.6%	30.7%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20604

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AUSTRIA

KEY FEATURES

Print and other traditional media still attract large audiences in Austria, but time spent with digital media is on the rise.

- Print newspapers did well in Austria in early 2020. In Q1 2020, 76.4% of internet users ages 16 to 64 had read a print newspaper in the month prior to polling, up from 74.3% last year, according to GlobalWebIndex and Publicis Media. However, print magazine consumption had fallen from 67.4% to 66.1%. Readership of print newspapers and magazines increased with age—but penetration was above 54% even among respondents ages 16 to 24.

- Radio was marginally less popular in Q1 2020 than a year prior, but it did reach 81.1% of internet users. Consumption remained higher among affluent and rural residents, and among respondents ages 45 to 64. By contrast, younger web users made up the bulk of digital audio listeners. In total, the share of internet users accessing music, podcasts, and other audio content on digital platforms rose 6.1 percentage points between H1 2019 and H1 2020.
- As in 2019, live TV viewing registered greater penetration in Austria than video streaming did, though that margin continues to shrink. While 88.6% of internet users polled in H1 2020 had watched broadcast TV in the prior month, 81.6% had streamed video-on-demand (VOD) content during that period.
- Time spent daily with broadcast radio and print press declined between 2019 and 2020, as time spent with online music streaming and digital news increased.

Video and social networking are driving the general shift toward digital.

- The average time spent daily with broadcast TV among internet users in Austria was marginally greater in 2020. It remained over an hour longer than time spent with online TV/video streaming, at 1 hour, 55 minutes (1:55) versus 54 minutes, respectively.
- All age groups are now moving away from broadcast TV viewing to some extent, though younger individuals are more likely to do so. In Q1 2020, 76.6% of respondents ages 16 to 24 said they had watched traditional broadcast TV in the prior month, compared with more than 91% of those 55 to 64. In both cohorts, the shares were lower than in Q1 2019.
- Similarly, VOD usage increased across age brackets year over year (YoY). Among internet users ages 16 to 24, the practice was nearly universal, at 96.3%. VOD viewing does still correlate with age, though. While 74.1% of respondents ages 45 to 54 had streamed VOD content in the prior month, just 63.3% of those ages 55 to 64 had done so.

- The age differential remains much more pronounced with respect to paid-for services such as Netflix or Maxdome. Overall, consumption of subscription VOD (SVOD) was up 5.6 percentage points, to 62.4% in H1 2020. The champions of SVOD viewing were 16- to 24-year-olds—90.3% of this cohort had watched such content in the prior month. Penetration dropped to 43.8% among internet users ages 45 to 54 and to 34.1% in the oldest group.
- There was less variation in take-up of social networking. Some 85.5% of internet users said they'd used social sites or apps in the prior month. Among the 16-to-24 age group, the share was pushing 90%, while penetration in the 55-to-64 bracket just surpassed 80%. The average time spent with social media each day climbed to 1:20, a gain of 4 minutes compared with H1 2019.

Smartphone and tablet ownership rose in 2020, with penetration skewing highest among affluent.

- Desktop/laptop ownership in Austria dropped below 90% in 2019 but remained robust in H1 2020, at 89.5%—one of the highest percentages recorded worldwide by GlobalWebIndex. The greatest penetration of PCs was among internet users in high-income households (92.9%) and those ages 55 to 64 (92.2%).
- Tablet ownership—also linked with affluence and older age groups—continued to rise, reaching 55.3% in H1 2020. Among high-income households, that share was 68.5%.
- Smartphone ownership climbed to 96.8% in H1 2020, from 95.9% the year prior. Yet the average time per day devoted to mobile activities lagged PC/tablet time by more than an hour (2:16 versus 3:21, respectively).
- While the popularity of game consoles is flagging in several countries, Austria is bucking the trend. More than one-third (35.9%) of internet users owned a gaming device in H1 2020. Several demographics registered higher shares than in H1 2019, including males (40.9%), respondents 25 to 34 (46.0%), and those 16 to 24 (51.7%).

Smart TVs top the shopping list of new digital devices and services for internet users in Austria by a large margin.

- Smart TV ownership in Austria was up 3 percentage points YoY, to 45.4% in H1 2020. That was more than double the penetration of TV streaming sticks and similar devices, which plateaued since H1 2019.
- The share of internet users ages 16 to 64 who owned a smartwatch rose by 3.6 percentage points from last year to 13.7%. Penetration of smart home products rose minimally, from 7.8% in H1 2019 to 8.7% in H1 2020. Only internet users in affluent households posted a substantially higher share, at 11.5%.
- Voice search experienced a rather hesitant start. More than 20% of internet users polled last year said they had used a voice assistant in the prior month. In H1 2020, that share declined to 19.7%. But uptake was higher among individuals in affluent households (24.5%) and respondents ages 16 to 24 (33.1%).

Device Ownership in Austria, H1 2019 & H1 2020
% of internet users

	H1 2019	H1 2020
Smartphone	95.9%	96.8%
Desktop/laptop	88.8%	89.5%
Tablet	54.0%	55.3%
Smart TV	42.4%	45.4%
Game console	34.2%	35.9%
TV streaming stick/device	22.0%	21.9%
Smartwatch	10.1%	13.7%
Smart wristband	9.3%	11.1%
Smart home device	7.8%	8.7%
Feature phone	3.0%	3.4%
VR headset/device	2.5%	2.7%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20543

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Smartphone and Tablet Owners in Austria, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.8%	97.5%	53.2%	53.2%
Male	95.0%	96.1%	54.9%	57.4%
Age				
16-24	98.4%	97.4%	43.4%	44.9%
25-34	97.0%	96.4%	50.7%	53.6%
35-44	97.0%	97.1%	61.8%	59.3%
45-54	95.0%	96.8%	56.4%	59.3%
55-64	91.5%	96.2%	57.2%	58.2%
Annual household income group				
High	98.3%	97.6%	67.9%	68.5%
Medium	98.3%	97.5%	56.4%	55.9%
Low	93.0%	95.9%	39.6%	44.7%
N/A*	92.3%	96.0%	50.8%	52.2%
Household location				
Urban	96.1%	96.5%	52.8%	54.9%
Suburban	95.9%	97.3%	56.1%	59.4%
Rural	95.6%	96.9%	54.5%	53.3%
Total	95.9%	96.8%	54.0%	55.3%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20612

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Smart TV Owners in Austria, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	37.2%	39.6%
Male	47.4%	51.0%
Age		
16-24	41.3%	41.0%
25-34	40.4%	48.1%
35-44	45.9%	49.2%
45-54	43.8%	46.6%
55-64	39.9%	40.2%
Annual household income group		
High	53.2%	50.8%
Medium	43.7%	49.5%
Low	33.7%	36.3%
N/A*	36.9%	46.0%
Household location		
Urban	40.8%	42.0%
Suburban	45.1%	51.8%
Rural	42.8%	46.1%
Total	42.4%	45.4%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20610

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Average Time Spent with Media in Austria, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



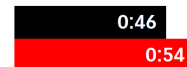
Broadcast radio



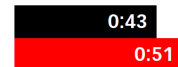
Social networking



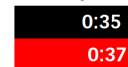
Online TV/streaming



Music streaming



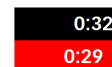
Online press



Gaming



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20605

www.eMarketer.com

Traditional Media Users in Austria, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20607

www.eMarketer.com

Traditional Media Users in Austria, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	67.2%	74.0%	80.9%	90.0%
Male	65.1%	78.6%	81.3%	87.2%
Age				
16-24	54.7%	60.3%	70.1%	76.6%
25-34	56.8%	72.4%	76.9%	85.7%
35-44	67.8%	77.2%	81.0%	90.0%
45-54	71.3%	80.7%	89.2%	97.2%
55-64	81.1%	91.9%	87.0%	91.2%
Annual household income group				
High	69.5%	85.1%	88.6%	95.1%
Medium	70.4%	80.1%	83.5%	89.6%
Low	57.0%	64.8%	74.1%	83.2%
N/A*	67.3%	74.8%	77.2%	86.1%
Household location				
Urban	62.1%	77.4%	75.6%	87.0%
Suburban	69.3%	72.5%	82.0%	87.7%
Rural	69.9%	77.4%	88.4%	91.4%
Total	66.1%	76.4%	81.1%	88.6%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20608

www.eMarketer.com

TV Viewers in Austria, by Method, H1 2020

% of internet users

Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20606

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Austria, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	76.7%	79.3%
Male	81.2%	83.9%
Age		
16-24	92.9%	96.3%
25-34	86.2%	89.5%
35-44	79.7%	84.2%
45-54	72.4%	74.1%
55-64	62.3%	63.3%
Annual household income group		
High	82.9%	80.9%
Medium	80.9%	83.7%
Low	77.1%	80.1%
N/A*	72.5%	82.6%
Household location		
Urban	79.9%	82.0%
Suburban	79.1%	83.1%
Rural	77.6%	80.1%
Total	79.0%	81.6%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20613

www.eMarketer.com

Social Media Users in Austria, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	86.1%	85.5%
Male	85.2%	85.6%
Age		
16-24	92.7%	89.1%
25-34	87.6%	87.3%
35-44	86.8%	85.4%
45-54	83.4%	84.9%
55-64	77.0%	80.2%
Annual household income group		
High	87.1%	86.2%
Medium	86.9%	86.3%
Low	85.0%	85.8%
N/A*	82.3%	82.0%
Household location		
Urban	87.0%	84.9%
Suburban	83.4%	86.6%
Rural	85.2%	85.7%
Total	85.7%	85.5%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20614

www.eMarketer.com

Digital Audio Listeners in Austria, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	52.7%	58.0%
Male	53.1%	59.9%
Age		
16-24	78.3%	84.5%
25-34	62.3%	71.7%
35-44	49.0%	58.9%
45-54	43.9%	45.8%
55-64	29.7%	34.1%
Annual household income group		
High	59.4%	54.1%
Medium	53.3%	65.5%
Low	50.6%	58.1%
N/A*	45.3%	53.5%
Household location		
Urban	55.3%	56.9%
Suburban	54.5%	63.0%
Rural	48.7%	59.3%
Total	52.9%	59.0%

Note: services include Amazon Music Unlimited, Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20609

www.eMarketer.com

Voice Search Users in Austria, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	14.6%	14.1%
Male	26.2%	25.1%
Age		
16-24	25.6%	33.1%
25-34	22.5%	24.0%
35-44	21.4%	18.4%
45-54	19.1%	13.6%
55-64	13.6%	10.2%
Annual household income group		
High	27.3%	24.5%
Medium	21.4%	20.1%
Low	15.2%	19.1%
N/A*	16.8%	12.6%
Household location		
Urban	22.7%	21.7%
Suburban	20.4%	19.5%
Rural	17.5%	17.1%
Total	20.5%	19.7%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20611

www.eMarketer.com

KEY FEATURES

Both smartphones and PCs registered increased ownership in 2020, while tablet ownership declined.

- In H1 2020, 92.9% of internet users in Belgium ages 16 to 64 owned a smartphone, according to GlobalWebIndex.
- PC ownership was greatest among respondents ages 55 to 64 (90.2%) and the affluent (88.8%). Internet users in rural areas were also more likely to have desktops/laptops than those in urban and suburban areas.
- Tablet ownership dropped to 49.2% overall, but it remained above 50% among females, internet users ages 35 to 54, and those living in middle- to high-income households.
- Time spent on both mobile and larger-screen devices increased since last year. In H1 2020, respondents estimated that they spent 3 hours, 17 minutes (3:17) daily with desktops/laptops and tablets, while mobile time averaged 2:10.

Print media audiences are experiencing attrition, while live TV viewing increasingly shares the screen with digital video.

- Even very recently, print media formats retained large audiences in Belgium. Yet in Q1 2020, penetration of both newspapers and magazines fell to 58.0% and 55.4%, respectively. As in previous years, males, older age groups, and internet users in high-income households were most likely to read print newspapers. Print magazines were also more popular in older, more affluent segments but skewed female. Time spent with print formats was less than time spent with online press, at 26 minutes and 38 minutes, respectively.

- To date, traditional TV has maintained robust audiences. In H1 2020, 89.7% of respondents had watched live TV in the prior month. Broadcasters' time-shifting options are popular, too. More than three-quarters (76.3%) of internet users polled had viewed TV shows they recorded earlier, and 47.9% had used a channel's catch-up or on-demand service. But alternatives for viewing TV and video content are growing fast. This year, 73.6% of internet users watched video-on-demand (VOD) in the prior month, and 54.8% had used a subscription VOD (SVOD) service like Amazon or Netflix, a share greater than in H1 2019.
- TV viewing and digital video streaming in Belgium correlated strongly with age. For example, 92.7% of respondents ages 16 to 24 streamed video in H1 2020 versus 48.1% of those 55 to 64.
- Similarly, young people were far more engaged with digital audio—24.6% of respondents ages 55 to 64 had streamed music, podcasts, or other digital audio content in the prior month, while usage among those ages 16 to 24 was over three times greater, at 77.3%. Across all demographics, 52.9% of respondents were digital audio listeners.

Newer technologies and devices have seen lackluster uptake.

- Ownership of smart TVs is solid but unexceptional in Belgium, at 40.9%, and registered no apparent growth between H1 2019 and H1 2020. However, penetration was over 45% among internet users living in middle- or high-income households.
- Adoption of other advanced digital devices and services has not changed much since last year. Usage of voice assistants, at 19.1%, was not appreciably greater in H1 2020 than in H1 2019. Similarly, just one in 10 internet users polled had a smartwatch or smart wristband in H1 2020, and only 7.5% owned a smart home product—such as a household energy monitor or remotely controlled security system. However, penetration rates for smartwatches and smart home devices were significantly above average among males, younger adults, and respondents in affluent households.

Device Ownership in Belgium, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	92.3%	92.9%
Desktop/laptop	83.5%	84.3%
Tablet	52.4%	49.2%
Smart TV	40.9%	40.9%
Game console	34.3%	32.9%
TV streaming stick/device	11.4%	13.1%
Smartwatch	8.9%	10.9%
Smart wristband	8.7%	10.4%
Feature phone	8.4%	8.4%
Smart home device	7.3%	7.5%
VR headset/device	3.2%	3.5%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20544

www.eMarketer.com

Smartphone and Tablet Owners in Belgium, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	93.4%	93.5%	53.3%	50.2%
Male	91.2%	92.4%	51.4%	48.2%
Age				
16-24	96.2%	96.6%	45.4%	42.8%
25-34	95.8%	95.6%	46.6%	48.0%
35-44	93.2%	96.2%	55.2%	53.8%
45-54	91.3%	90.8%	59.6%	51.8%
55-64	84.1%	84.9%	54.3%	48.9%
Annual household income group				
High	95.7%	94.9%	62.8%	57.1%
Medium	91.5%	93.6%	52.6%	51.7%
Low	89.4%	90.0%	42.5%	41.7%
N/A*	92.8%	93.2%	51.7%	46.0%
Household location				
Urban	93.8%	93.2%	49.8%	47.3%
Suburban	90.4%	92.8%	53.4%	51.9%
Rural	92.2%	92.8%	54.5%	48.9%
Total	92.3%	92.9%	52.4%	49.2%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20623

www.eMarketer.com

Smart TV Owners in Belgium, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	38.3%	37.3%
Male	43.5%	44.6%
Age		
16-24	36.6%	37.0%
25-34	38.7%	44.7%
35-44	44.9%	42.7%
45-54	46.6%	43.1%
55-64	36.5%	36.3%
Annual household income group		
High	45.8%	46.1%
Medium	45.2%	45.4%
Low	35.5%	32.5%
N/A*	36.4%	38.9%
Household location		
Urban	38.4%	39.9%
Suburban	42.0%	42.4%
Rural	42.8%	40.8%
Total	40.9%	40.9%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20621

www.eMarketer.com

Average Time Spent with Media in Belgium, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Broadcast TV



Mobile



Social networking



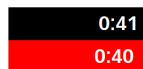
Broadcast radio



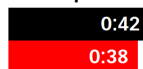
Music streaming



Online TV/streaming



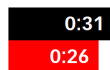
Online press



Gaming



Print



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20616

www.eMarketer.com

Traditional Media Users in Belgium, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019 ■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20618

www.eMarketer.com

Traditional Media Users in Belgium, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	56.6%	54.1%	89.1%	91.3%
Male	54.1%	61.9%	80.2%	88.5%
Age				
16-24	40.2%	44.0%	71.4%	79.8%
25-34	49.1%	56.0%	82.1%	86.9%
35-44	58.7%	61.0%	86.5%	92.8%
45-54	59.5%	61.6%	90.7%	96.7%
55-64	69.5%	67.2%	92.3%	92.6%
Annual household income group				
High	62.9%	66.4%	86.4%	90.8%
Medium	59.2%	62.1%	92.9%	92.5%
Low	47.6%	54.1%	74.0%	86.8%
N/A*	48.7%	45.5%	81.8%	88.3%
Household location				
Urban	53.7%	58.6%	78.9%	84.6%
Suburban	56.1%	61.0%	88.8%	93.4%
Rural	56.7%	54.6%	87.7%	93.1%
Total	55.4%	58.0%	84.7%	89.9%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20619

www.eMarketer.com

TV Viewers in Belgium, by Method, H1 2020

% of internet users

Broadcast live on TV channel

89.7%

Recorded from TV

76.3%

SVOD*

54.8%

TV channel's catch-up/on-demand service

47.9%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20617

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Belgium, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	69.9%	70.3%
Male	72.6%	76.9%
Age		
16-24	91.1%	92.7%
25-34	80.6%	85.1%
35-44	71.5%	75.4%
45-54	61.4%	65.4%
55-64	50.5%	48.1%
Annual household income group		
High	73.7%	79.4%
Medium	70.9%	73.0%
Low	71.3%	67.4%
N/A*	68.8%	75.3%
Household location		
Urban	75.0%	77.2%
Suburban	70.0%	75.2%
Rural	68.2%	68.3%
Total	71.2%	73.6%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20624

www.eMarketer.com

Social Media Users in Belgium, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	84.5%	84.4%
Male	81.2%	82.8%
Age		
16-24	86.9%	88.7%
25-34	85.8%	87.6%
35-44	82.5%	82.7%
45-54	83.7%	79.9%
55-64	74.4%	79.2%
Annual household income group		
High	85.4%	85.4%
Medium	81.0%	84.2%
Low	81.2%	81.0%
N/A*	84.1%	83.8%
Household location		
Urban	85.6%	83.8%
Suburban	79.4%	84.6%
Rural	82.5%	82.6%
Total	82.9%	83.6%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20625

www.eMarketer.com



Digital Audio Listeners in Belgium, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	45.1%	49.1%
Male	55.1%	56.8%
Age		
16-24	82.8%	77.3%
25-34	60.3%	67.2%
35-44	49.7%	56.4%
45-54	35.4%	38.2%
55-64	20.7%	24.6%
Annual household income group		
High	54.6%	55.7%
Medium	45.3%	52.6%
Low	52.0%	52.1%
N/A*	49.0%	51.4%
Household location		
Urban	54.0%	61.1%
Suburban	48.8%	49.5%
Rural	46.7%	47.2%
Total	50.0%	52.9%

Note: services include Amazon Music Unlimited, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way.";

*don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20620

www.eMarketer.com

Voice Search Users in Belgium, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	14.0%	14.3%
Male	24.1%	23.9%
Age		
16-24	27.2%	30.7%
25-34	27.4%	27.4%
35-44	17.6%	18.8%
45-54	15.0%	13.5%
55-64	7.9%	6.2%
Annual household income group		
High	23.2%	24.1%
Medium	18.4%	19.7%
Low	21.5%	17.1%
N/A*	12.8%	15.7%
Household location		
Urban	22.6%	23.3%
Suburban	19.6%	16.4%
Rural	14.4%	16.9%
Total	19.0%	19.1%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20622

www.eMarketer.com

BRAZIL

KEY FEATURES

Mobile claims a huge share of time spent in Brazil, and smartphone ownership is near saturation.

- Smartphone ownership among internet users ages 16 to 64 rose further this year, to 98.4% in H1 2020, according to GlobalWebIndex. PC ownership declined marginally to 67.7%, but levels rose in line with rising income levels.
- Internet users in Brazil spent a remarkable 5 hours, 11 minutes (5:11) daily on mobile devices in H1 2020, versus 4:28 on PCs and tablets. Year over year, mobile time increased more than PC time did.
- Much of that mobile time is devoted to social media, at 3:40 daily in H1 2020. (GlobalWebIndex includes YouTube in its social media category, which tends to increase time spent as well as social user numbers.)



- Online news content also accounted for a major share of respondents' time on a typical day, at 2:29—10 minutes more than the average in H1 2019, and about four times the 37 minutes daily devoted to print press. It's likely that the pandemic contributed to this increase, as consumers searched online for the latest news and other relevant information. If anything, that need will grow more acute, as the country deals with more than 5.0 million infections and 150,000 virus-related deaths.

Digital video now draws larger audiences than live TV—though TV occupies more time. But audiences for traditional media are shrinking.

- Digital video viewing has an astonishing reach in Brazil—at least among the population sampled for the survey. Overall, 91.2% of that group, including 95.0% of internet users ages 16 to 24—had streamed video-on-demand (VOD) content in the month prior to polling. Subscription VOD (SVOD) services like Netflix and Amazon Prime Video reached 86.2% of the sample during the same period.
- Broadcast TV drew huge audiences, too—89.8% of internet users had watched live TV in the preceding month. The share of those who recorded TV shows for later viewing had dropped significantly from the prior year, though, from 38.0% to 33.8%.
- Yet broadcast TV maintained a distinct edge over digital video in terms of time spent: an average 2:31 per day in 2020, compared with 1:23 spent viewing TV shows or other video content online.
- In terms of smart TV ownership, 60.8% of respondents in Brazil had a smart TV in H1 2020. Predictably, ownership correlated directly with higher income.
- Digital audio has gained momentum as well. In H1 2020, 82.5% of internet users had accessed music, podcasts, or other audio content online in the month before polling, compared with 75.6% in H1 2019. Music streaming accounted for an estimated 1:42 per day.
- Broadcast radio and print media, including newspapers and magazines, all posted marginally lower penetration in Brazil in Q1 2020 compared with the prior year. That said, usage remained relatively high—73.2% of respondents had listened to radio shows, and 49.4% had read a print newspaper. Almost as many (47.9%) had read a print magazine.

Device Ownership in Brazil, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	97.6%	98.4%
Desktop/laptop	68.5%	67.7%
Smart TV	56.5%	60.8%
Tablet	37.0%	33.2%
Game console	29.9%	30.2%
TV streaming stick/device	19.8%	22.1%
Smartwatch	6.8%	11.3%
Feature phone	11.4%	9.6%
Smart wristband	3.9%	7.4%
Smart home device	4.6%	4.4%
VR headset/device	4.1%	3.4%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20545

www.eMarketer.com

Smartphone and Tablet Owners in Brazil, H1 2019 & H1 2020 % of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	97.8%	98.4%	39.7%	34.0%
Male	97.4%	98.3%	33.8%	32.4%
Age				
16-24	97.5%	98.3%	26.8%	24.8%
25-34	98.0%	98.7%	40.3%	33.6%
35-44	98.0%	98.6%	43.0%	38.5%
45-54	96.9%	98.2%	42.4%	39.3%
55-64*	-	-	-	-
Annual household income group				
High	98.6%	99.3%	48.9%	47.1%
Medium	98.5%	99.1%	38.4%	35.8%
Low	96.8%	98.0%	29.4%	25.6%
N/A**	95.4%	95.7%	24.3%	23.0%
Household location				
Urban	97.7%	98.4%	37.9%	34.2%
Suburban*	-	-	-	-
Rural*	-	-	-	-
Total	97.6%	98.4%	37.0%	33.2%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20634

www.eMarketer.com

Smart TV Owners in Brazil, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	56.7%	59.6%
Male	56.3%	62.0%
Age		
16-24	49.5%	55.2%
25-34	59.1%	61.0%
35-44	59.1%	63.5%
45-54	60.1%	62.6%
55-64*	-	-
Annual household income group		
High	70.8%	71.6%
Medium	62.3%	67.9%
Low	45.1%	53.1%
N/A**	39.5%	46.8%
Household location		
Urban	57.2%	62.1%
Suburban*	-	-
Rural*	-	-
Total	56.5%	60.8%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20632

www.eMarketer.com

Average Time Spent with Media in Brazil, H1 2019 & H1 2020

hrs:mins per day among internet users

Mobile



Desktop/laptop/tablet



Social networking



Broadcast TV



Online press



Music streaming



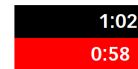
Online TV/streaming



Gaming



Broadcast radio



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20627

www.eMarketer.com

Traditional Media Users in Brazil, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20629

www.eMarketer.com

Traditional Media Users in Brazil, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	48.8%	48.2%	72.7%	95.0%
Male	47.1%	50.7%	73.6%	91.0%
Age				
16-24	39.9%	41.2%	62.7%	91.0%
25-34	48.0%	50.3%	72.0%	92.3%
35-44	53.1%	55.7%	78.1%	94.2%
45-54	52.3%	51.2%	82.0%	94.9%
55-64*	-	-	-	-
Annual household income group				
High	57.0%	56.6%	80.6%	96.6%
Medium	46.4%	47.4%	75.0%	94.3%
Low	46.1%	49.6%	66.9%	91.3%
N/A**	30.8%	31.8%	68.6%	84.7%
Household location				
Urban	49.7%	50.7%	73.6%	93.4%
Suburban*	-	-	-	-
Rural*	-	-	-	-
Total	47.9%	49.4%	73.2%	93.0%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20630

www.eMarketer.com

TV Viewers in Brazil, by Method, H1 2020

% of internet users

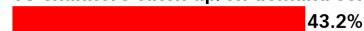
Broadcast live on TV channel



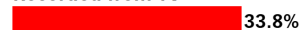
SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20628

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Brazil, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	89.3%	91.0%
Male	87.8%	91.3%
Age		
16-24	95.3%	95.0%
25-34	88.2%	93.2%
35-44	86.7%	89.9%
45-54	83.7%	86.5%
55-64*	-	-
Annual household income group		
High	93.8%	94.9%
Medium	88.5%	93.7%
Low	85.6%	88.9%
N/A**	81.0%	81.2%
Household location		
Urban	88.3%	91.4%
Suburban*	-	-
Rural*	-	-
Total	88.6%	91.2%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20635

www.eMarketer.com

Social Media Users in Brazil, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	85.8%	89.3%
Male	84.4%	89.1%
Age		
16-24	86.7%	89.6%
25-34	85.5%	90.7%
35-44	85.2%	88.7%
45-54	84.3%	87.8%
55-64*	-	-
Annual household income group		
High	86.2%	90.1%
Medium	83.7%	89.7%
Low	86.2%	89.2%
N/A**	82.1%	86.1%
Household location		
Urban	85.3%	89.2%
Suburban*	-	-
Rural*	-	-
Total	85.2%	89.2%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20636

www.eMarketer.com

Digital Audio Listeners in Brazil, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	75.9%	82.3%
Male	75.4%	82.6%
Age		
16-24	87.4%	91.8%
25-34	79.4%	87.6%
35-44	69.9%	79.2%
45-54	65.1%	70.5%
55-64*	-	-
Annual household income group		
High	80.3%	85.3%
Medium	75.5%	82.9%
Low	73.8%	82.1%
N/A**	66.2%	74.1%
Household location		
Urban	75.9%	82.8%
Suburban*	-	-
Rural*	-	-
Total	75.6%	82.5%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20631

www.eMarketer.com

Voice Search Users in Brazil, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	36.2%	35.3%
Male	38.0%	41.0%
Age		
16-24	43.1%	45.4%
25-34	41.1%	39.8%
35-44	34.7%	36.5%
45-54	27.5%	32.8%
55-64*	-	-
Annual household income group		
High	44.1%	41.8%
Medium	37.2%	40.4%
Low	33.5%	36.9%
N/A**	25.5%	28.0%
Household location		
Urban	37.5%	38.6%
Suburban*	-	-
Rural*	-	-
Total	37.1%	38.1%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20633

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KEY FEATURES

Smartphone ownership surpassed 90% for the first time, as penetration among older demographics increased.

- Between H1 2019 and H1 2020, smartphone penetration in Canada rose from 89.3% to 92.5% of internet users ages 16 to 64, GlobalWebIndex reported. Respondents ages 55 to 64 were chiefly responsible; ownership leapt from 72.9% to 85.5% in that group.
- The share of 55- to 64-year-olds who owned a PC equaled the share owning a smartphone: 85.5%. In H1 2020, PC ownership declined among internet users ages 16 to 64 to 82.0%, while tablet ownership increased overall, especially among older and affluent groups.
- The average time spent daily with tablets and PCs reached 3 hours, 54 minutes (3:54)—while time spent daily with mobile increased to 2:34.

The reach of subscription video offerings now rivals that of live TV.

- Just under 90% of respondents polled in H1 2020 had watched traditional TV in the preceding month, though penetration of live broadcast TV was a good deal lower, at 76.8%. In a switch from 2019, males were more likely than females to be live TV viewers. Males were also more likely to have used on-demand or catch-up services or watched TV shows they had recorded earlier.
- Use of subscription video-on-demand (SVOD) services like Amazon Prime Video and Disney+ has expanded steadily in Canada. By H1 2020, SVOD penetration had risen to 76.2%, up from 69.3% the year prior. Use of subscription video offerings still correlated with age; penetration in the youngest cohort (92.4%) was far greater than among internet users ages 55 to 64 (56.3%).

- Continuing another trend that emerged last year, Canada's internet users were more likely to be active on social media than to watch live TV in H1 2020. Fully 84.2% of those polled had visited social platforms in the prior month—including nearly 79% of the oldest cohort. It's worth noting that GlobalWebIndex includes YouTube in its social media category, which widens the reach of social beyond sites like Instagram and Facebook.

Smart TVs and other digital devices are gaining fans.

- Smart TV ownership climbed several percentage points between H1 2019 and H1 2020 to 43.6%. There's little sign that smart TVs are a priority purchase for internet users in Canada who don't already have one. That said, 51.2% of respondents in high-income households did say they owned a smart TV.
- Smart home products like remote-controlled energy monitors and video-enabled home security systems recorded a more dramatic increase, with ownership rising from 12.6% to 18.3% YoY. In many other countries, GlobalWebIndex recorded penetration closer to 10%. It's also no surprise that usage was highest (24.1%) in the most affluent homes. But ownership was also above 20% among internet users in suburban households and those ages 16 to 24.

Device Ownership in Canada, H1 2019 & H1 2020
% of internet users

	H1 2019	H1 2020
Smartphone	89.3%	92.5%
Desktop/laptop	83.1%	82.0%
Tablet	52.7%	55.1%
Smart TV	39.3%	43.6%
Game console	40.4%	38.3%
TV streaming stick/device	22.2%	26.5%
Smart home device	12.6%	18.3%
Smartwatch	8.8%	12.1%
Smart wristband	9.9%	10.9%
Feature phone	6.3%	4.9%
VR headset/device	3.7%	3.5%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20546

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Smartphone and Tablet Owners in Canada, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	89.4%	93.3%	55.8%	57.7%
Male	89.2%	91.8%	49.5%	52.6%
Age				
16-24	96.8%	95.8%	37.7%	42.4%
25-34	95.6%	94.9%	49.7%	51.7%
35-44	93.3%	93.8%	62.4%	61.2%
45-54	86.7%	92.4%	58.1%	60.4%
55-64	72.9%	85.5%	55.3%	59.7%
Annual household income group				
High	92.9%	95.8%	61.3%	63.0%
Medium	90.6%	93.4%	56.2%	56.1%
Low	85.8%	87.6%	42.8%	45.4%
N/A*	84.8%	90.6%	45.5%	47.8%
Household location				
Urban	90.7%	93.0%	51.0%	53.0%
Suburban	89.4%	93.1%	56.4%	57.4%
Rural	85.1%	90.0%	50.9%	56.6%
Total	89.3%	92.5%	52.7%	55.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20645

www.eMarketer.com

Smart TV Owners in Canada, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	39.4%	43.1%
Male	39.1%	44.0%
Age		
16-24	31.6%	37.2%
25-34	38.8%	41.0%
35-44	44.6%	46.7%
45-54	42.7%	46.9%
55-64	38.2%	46.0%
Annual household income group		
High	49.6%	51.2%
Medium	39.7%	45.1%
Low	31.2%	33.1%
N/A*	30.2%	37.4%
Household location		
Urban	37.9%	41.9%
Suburban	41.0%	45.6%
Rural	39.9%	44.2%
Total	39.3%	43.6%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20643

www.eMarketer.com

Average Time Spent with Media in Canada, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



Music streaming



Online TV/streaming



Broadcast radio



Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20638

www.eMarketer.com

Traditional Media Users in Canada, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20640

www.eMarketer.com

Traditional Media Users in Canada, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	39.2%	43.5%	83.0%	91.1%
Male	44.2%	52.0%	79.8%	87.9%
Age				
16-24	32.5%	37.7%	71.3%	84.5%
25-34	39.2%	43.2%	79.2%	85.7%
35-44	41.6%	44.3%	82.5%	88.4%
45-54	43.3%	51.6%	86.5%	93.4%
55-64	52.0%	62.5%	87.3%	95.6%
Annual household income group				
High	48.8%	51.4%	86.8%	92.0%
Medium	39.5%	48.6%	82.5%	89.2%
Low	35.0%	42.1%	72.1%	86.1%
N/A*	40.5%	46.0%	81.9%	90.4%
Household location				
Urban	43.1%	50.0%	78.2%	88.3%
Suburban	39.4%	44.2%	83.0%	90.5%
Rural	42.2%	48.4%	87.6%	91.0%
Total	41.7%	47.8%	81.4%	89.5%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20641

www.eMarketer.com

TV Viewers in Canada, by Method, H1 2020

% of internet users

Broadcast live on TV channel



SVOD*



Recorded from TV



TV channel's catch-up/on-demand service



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20639

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Canada, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	75.6%	81.3%
Male	75.8%	78.8%
Age		
16-24	90.8%	94.2%
25-34	85.1%	88.6%
35-44	80.8%	80.8%
45-54	65.6%	72.3%
55-64	55.1%	63.9%
Annual household income group		
High	79.2%	83.3%
Medium	75.5%	80.5%
Low	74.0%	75.7%
N/A*	69.4%	75.5%
Household location		
Urban	78.9%	81.4%
Suburban	75.2%	81.1%
Rural	67.5%	73.6%
Total	75.7%	80.0%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20646

www.eMarketer.com

Social Media Users in Canada, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	82.5%	86.4%
Male	81.6%	82.0%
Age		
16-24	88.5%	89.0%
25-34	86.3%	87.1%
35-44	83.4%	84.2%
45-54	78.1%	81.8%
55-64	73.2%	78.9%
Annual household income group		
High	84.2%	85.0%
Medium	82.0%	83.1%
Low	80.9%	84.9%
N/A*	78.3%	82.9%
Household location		
Urban	82.5%	84.7%
Suburban	82.5%	84.1%
Rural	79.8%	83.0%
Total	82.0%	84.2%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20647

www.eMarketer.com

Digital Audio Listeners in Canada, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	57.7%	64.2%
Male	59.7%	63.6%
Age		
16-24	88.0%	90.0%
25-34	73.4%	77.2%
35-44	56.8%	63.8%
45-54	44.2%	50.1%
55-64	29.8%	38.2%
Annual household income group		
High	63.0%	66.2%
Medium	56.6%	63.0%
Low	56.5%	62.8%
N/A*	59.0%	60.0%
Household location		
Urban	62.3%	67.2%
Suburban	57.2%	63.4%
Rural	51.2%	55.0%
Total	58.7%	63.9%

Note: services include Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iHeartRadio, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20642

www.eMarketer.com

Voice Search Users in Canada, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	25.6%	29.2%
Male	33.6%	34.8%
Age		
16-24	45.0%	49.0%
25-34	38.7%	38.0%
35-44	31.3%	30.1%
45-54	21.2%	24.7%
55-64	11.9%	17.9%
Annual household income group		
High	32.8%	33.0%
Medium	27.4%	31.2%
Low	29.4%	32.0%
N/A*	26.2%	30.5%
Household location		
Urban	31.1%	34.2%
Suburban	30.5%	32.1%
Rural	23.7%	25.0%
Total	29.5%	32.0%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20644

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KEY FEATURES

PCs and laptops are falling out of favor in some cohorts, as smartphones cement their dominant role in media consumption.

- In H1 2020, 94.0% of internet users ages 16 to 64 in China polled by GlobalWebIndex owned a smartphone, and a mere 3.3% owned a feature phone. Smartphones were marginally more widespread among younger respondents.
- The centrality of smartphones in China is such that many internet users may find a desktop or laptop to be superfluous. PC penetration plunged by nearly 12 percentage points between H1 2019 and H1 2020, from 61.6% to 50.4%—one of the largest shifts in device ownership found in any country surveyed. Tablet penetration also fell sharply year over year (YoY) from 37.5% to 30.5%, with ownership skewing higher among urban residents, affluents, and adults ages 25 to 34. However, it's worth noting that ownership of all devices apparently declined YoY, per GlobalWebIndex.
- The average time spent daily with mobile devices was 3 hours, 10 minutes (3:10) in 2020—a marginal decline. But total time spent with PCs and tablets fell from 2:47 to 2:20 daily.

For the majority of web users, digital audio and video coexist happily with traditional broadcast media.

- Broadcast TV is very much alive and well in China, in conjunction with time-shifted and digital viewing options. Nearly 89% of internet users watched live TV in the month prior to polling. Almost 64% viewed TV programs they'd recorded earlier, while 78.0% used broadcasters' catch-up or on-demand services.
- Digital video consumption was nearly universal among China's internet users in 2019 and remained so this year, with 95.2% accessing video-on-demand (VOD) services in the previous month. Nearly 92% of respondents listened to digital audio as well.

- Figures for time spent also highlight the growing popularity of digital video and audio. Internet users devoted an estimated 1:40 per day to online TV and video, and an additional 1:32 daily to music streaming.
- Social media also registered an uptick, as the share of internet users visiting social platforms at least once in the prior month rose from 88.7% to 90.9% YoY. Yet respondents estimated that they spent, on average, 10 minutes less per day with social media than the year prior, at 2:03.

Adoption of several smart devices, including wristbands and smart home products, has slowed dramatically.

- Perhaps surprisingly, given the interest in digital video, smart TV ownership in China declined from 41.7% in H1 2019 to 33.7% in H1 2020. Penetration of TV streaming sticks and similar devices also slipped, from 8.5% to just 6.8%.
- Similarly, China's internet users are no longer posting some of the world's most impressive adoption rates for smartwatches and smart wristbands. Ownership of these devices dropped from 16.4% and 18.5%, respectively, in H1 2019 to 14.1% and 15.3%, respectively, in H1 2020. Penetration of game consoles also shrank from 13.7% to 10.4%. Even the most affluent individuals were increasingly doing without these three devices.
- The same trend was evident with respect to smart home devices like smart appliances or remotely controlled security systems. In H1 2019, 15.7% of internet users polled owned at least one smart home product; as of H1 2020, that share was 13.5%. However, ownership remained several percentage points greater among affluents and 25- to 34-year-olds.
- While some newer digital devices are struggling to gain a firm foothold in the Chinese marketplace, voice assistants are already well established. The share of internet users who used voice search at least once in the prior month remained effectively unchanged in H1 2020 at 55.3%. GlobalWebIndex recorded substantially greater penetration among respondents ages 25 to 34 (57.9%) and those living in high-income households (61.6%).

Device Ownership in China, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	95.6%	94.0%
Desktop/laptop	61.6%	50.4%
Smart TV	41.7%	33.7%
Tablet	37.5%	30.5%
Smart wristband	18.5%	15.3%
Smartwatch	16.4%	14.1%
Smart home device	15.7%	13.5%
Game console	13.7%	10.4%
TV streaming stick/device	8.5%	6.8%
VR headset/device	5.0%	4.0%
Feature phone	5.0%	3.3%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20547

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Smartphone and Tablet Owners in China, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.4%	94.3%	38.5%	30.7%
Male	94.7%	93.7%	36.6%	30.3%
Age				
16-24	97.9%	95.6%	34.5%	27.7%
25-34	95.4%	93.3%	44.7%	35.3%
35-44	93.2%	93.8%	37.6%	32.5%
45-54	95.6%	93.0%	30.7%	24.8%
55-64*	-	-	-	-
Annual household income group				
High	94.9%	92.8%	43.4%	37.1%
Medium	97.7%	93.7%	42.3%	35.8%
Low	94.6%	94.8%	30.7%	22.6%
N/A**	92.6%	96.9%	25.1%	24.0%
Household location				
Urban	96.0%	94.5%	39.5%	33.4%
Suburban	93.1%	91.3%	31.8%	25.0%
Rural*	-	-	-	-
Total	95.6%	94.0%	37.5%	30.5%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20656

www.eMarketer.com

Smart TV Owners in China, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	42.8%	33.8%
Male	40.7%	33.7%
Age		
16-24	37.4%	31.7%
25-34	46.3%	36.0%
35-44	42.4%	33.8%
45-54	38.7%	32.4%
55-64*	-	-
Annual household income group		
High	39.3%	30.0%
Medium	46.7%	38.5%
Low	40.5%	33.0%
N/A**	28.8%	32.1%
Household location		
Urban	42.8%	34.3%
Suburban	38.5%	32.9%
Rural*	-	-
Total	41.7%	33.7%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

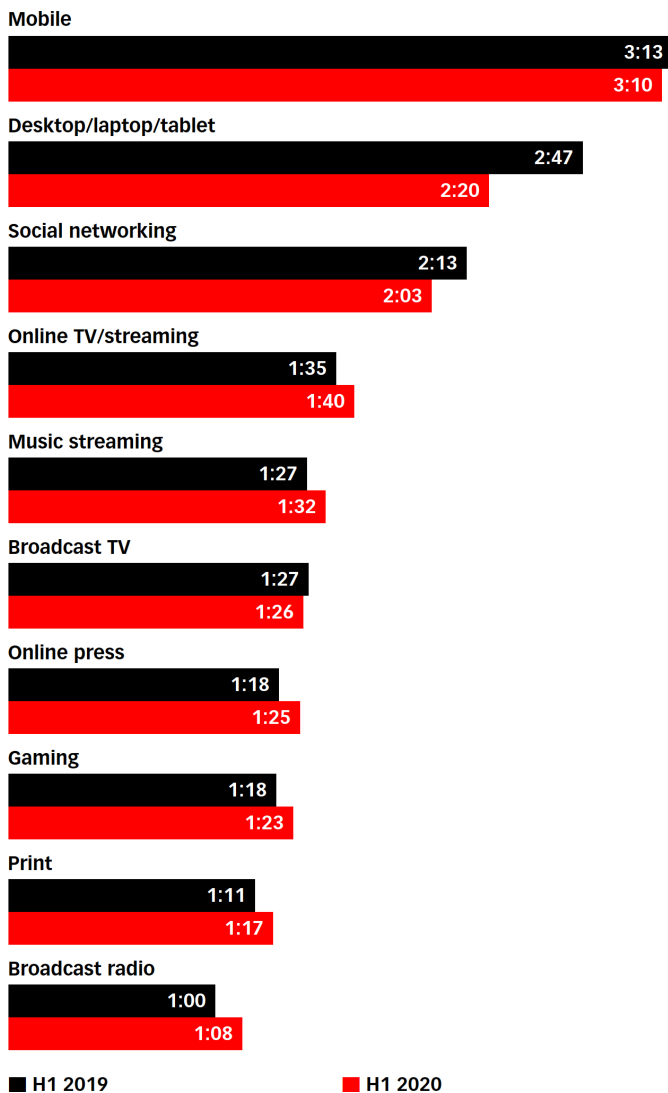
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20654

www.eMarketer.com

Average Time Spent with Media in China, H1 2019 & H1 2020

hrs:mins per day among internet users



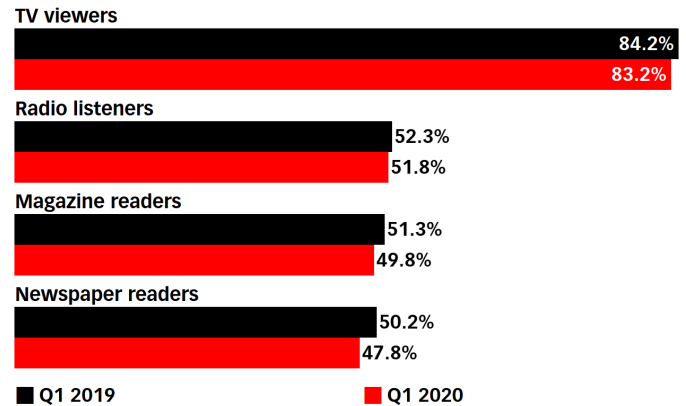
Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20649

www.eMarketer.com

Traditional Media Users in China, Q1 2019 & Q1 2020

% of internet users



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20651

www.eMarketer.com

Traditional Media Users in China, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	49.1%	45.7%	51.4%	84.6%
Male	50.4%	49.6%	52.2%	82.0%
Age				
16-24	44.6%	37.1%	43.0%	80.0%
25-34	52.3%	50.3%	55.2%	85.2%
35-44	51.8%	52.5%	57.0%	84.9%
45-54	50.6%	51.0%	51.3%	81.1%
55-64*	-	-	-	-
Annual household income group				
High	56.0%	57.6%	59.4%	85.7%
Medium	52.3%	50.0%	55.0%	84.5%
Low	43.7%	39.8%	44.7%	80.2%
N/A**	40.6%	31.9%	36.8%	83.2%
Household location				
Urban	51.8%	50.0%	53.3%	83.8%
Suburban	46.6%	44.5%	50.7%	81.3%
Rural*	-	-	-	-
Total	49.8%	47.8%	51.8%	83.2%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20652

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TV Viewers in China, by Method, H1 2020

% of internet users

Broadcast live on TV channel

88.5%

TV channel's catch-up/on-demand service

78.0%

SVOD*

72.4%

Recorded from TV

63.8%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20650

www.eMarketer.com

Video-on-Demand (VOD) Viewers in China, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	95.9%	95.5%
Male	96.5%	95.0%
Age		
16-24	97.4%	97.8%
25-34	97.7%	96.6%
35-44	95.1%	94.4%
45-54	93.3%	92.0%
55-64*	-	-
Annual household income group		
High	96.6%	95.7%
Medium	96.5%	95.7%
Low	95.8%	94.6%
N/A**	94.2%	93.6%
Household location		
Urban	96.2%	95.0%
Suburban	96.6%	95.6%
Rural*	-	-
Total	96.2%	95.2%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20657

www.eMarketer.com

Social Media Users in China, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	88.6%	91.6%
Male	88.9%	90.2%
Age		
16-24	88.0%	89.1%
25-34	90.8%	91.9%
35-44	89.7%	92.4%
45-54	84.4%	90.9%
55-64*	-	-
Annual household income group		
High	92.3%	92.0%
Medium	90.7%	91.8%
Low	86.4%	90.6%
N/A**	75.0%	80.6%
Household location		
Urban	89.4%	91.4%
Suburban	87.1%	90.8%
Rural*	-	-
Total	88.7%	90.9%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Qzone, RenRen, Sina Weibo, Tencent QQ, Tencent Weibo, Youku and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20658

www.eMarketer.com

Digital Audio Listeners in China, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	92.8%	91.9%
Male	92.7%	91.8%
Age		
16-24	92.7%	94.6%
25-34	95.4%	95.5%
35-44	92.0%	90.7%
45-54	89.4%	85.5%
55-64*	-	-
Annual household income group		
High	94.9%	93.8%
Medium	93.2%	92.2%
Low	91.6%	90.5%
N/A**	87.6%	89.0%
Household location		
Urban	93.0%	91.6%
Suburban	92.1%	93.0%
Rural*	-	-
Total	92.8%	91.9%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, KuGou, Kuwo, Musify, QQ Music, SoundCloud, Spotify, Xiami and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20653

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Voice Search Users in China, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	55.6%	54.7%
Male	54.9%	55.8%
Age		
16-24	56.9%	54.3%
25-34	58.9%	57.9%
35-44	54.7%	55.1%
45-54	47.9%	53.9%
55-64*	-	-
Annual household income group		
High	60.7%	61.6%
Medium	56.5%	55.1%
Low	51.3%	51.8%
N/A**	45.4%	46.4%
Household location		
Urban	56.2%	56.5%
Suburban	51.9%	53.5%
Rural*	-	-
Total	55.2%	55.3%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20655

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COLOMBIA

KEY FEATURES

Traditional media audiences declined in Colombia since 2019 but remained greater than in many countries surveyed.

- Print magazine readership took the biggest hit, falling 8 percentage points in Q1 2020 to 59.6% of internet users ages 16 to 64. Meanwhile, 64.2% had read a newspaper in the month prior to polling, a drop of nearly 6 percentage points. Yet in both cases, readership was notably high compared with other countries that GlobalWebIndex and Publicis Media monitored.
- Nearly 79% of respondents in Colombia were monthly radio listeners. As with print media, usage was most common in older age brackets.
- Even live TV posted a small decrease in penetration in H1 2020, to 87.7% of internet users. Middle- and high-income households, and those in suburban areas, were most likely to watch broadcast TV.

Gains in digital alternatives outpace any declines in traditional media formats.

- In H1 2020, the average daily time spent with print media was 36 minutes (0:36)—one minute less compared with H1 2019. However, internet users devoted more time to online press (1:08), a 10-minute increase year over year (YoY).
- Similarly, broadcast radio has long seen competition from music streaming and other digital audio options. More than three-quarters (78.6%) of internet users listened to digital audio in the month before polling, with higher penetration among younger cohorts. Time spent with broadcast radio was down slightly from 2019, while time spent with music streaming increased a few minutes to 1:23.
- Broadly speaking, the reach of digital video has overtaken that of traditional TV. Overall, 91.7% of internet users in Colombia said they had streamed video content of some kind in the month prior. The proportion paying for digital access to video content like Netflix was somewhat smaller—but still sizable. In H1 2020, 82.0% of respondents said they had watched subscription video-on-demand (SVOD) in the preceding month.

- Broadcast TV continued to claim far more time than digital video, however, at 2:32, versus 1:13 devoted to online TV or streaming.
- Meanwhile, smart TVs have made inroads with internet users in Colombia: 57.0% of respondents owned one in H1 2020 compared with 55.8% last year. As in 2019, uptake was much lower in low-income households and suburban areas, but reached 72.6% of internet users in high-income households, up from 67.7% last year.

Smartphone penetration is exceptionally high in Colombia, but most internet users have a PC as well.

- More than 98% of internet users polled in Colombia owned a smartphone in 2020, while 14.4% owned a feature phone. As in Brazil, near-universal smartphone ownership in the sample population helped to account for a massive amount of daily time spent on mobile phones—5:01 on average, up nearly a half hour YoY.
- As of H1 2020, 75.1% of internet users owned a desktop or laptop, while 36.0% owned a tablet. Ownership of both devices fell more than 3 percentage points from the year prior. Moreover, time spent with PCs and tablets declined marginally to 4:07.
- Social media usage is a huge contributor to consumers' total media time, especially on mobile devices. Fully 91.3% of web users polled had accessed social media in the prior month, spending an average 3:40 per day. (GlobalWebIndex includes YouTube in its social media calculations, which tends to boost usage figures as well as time spent.)
- Smartphone ownership is also strongly linked to voice search. Some 41.5% of respondents said they used voice assistants like Apple's Siri and Microsoft's Cortana at least once per month; uptake remained higher among males than females (at 44.5% and 38.8%, respectively). Respondents living in affluent homes were more likely to be voice assistant users as well, at 47.3%.

Device Ownership in Colombia, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	97.2%	98.5%
Desktop/laptop	78.6%	75.1%
Smart TV	55.8%	57.0%
Tablet	39.5%	36.0%
Game console	28.9%	28.8%
Feature phone	14.4%	14.4%
TV streaming stick/device	11.4%	12.8%
Smartwatch	9.7%	12.0%
Smart home device	9.4%	9.3%
Smart wristband	4.9%	8.1%
VR headset/device	3.4%	3.1%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20548

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Smartphone and Tablet Owners in Colombia, H1 2019 & H1 2020 % of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	97.1%	98.2%	39.7%	36.6%
Male	97.3%	98.9%	39.3%	35.5%
Age				
16-24	98.6%	98.9%	32.3%	30.3%
25-34	97.8%	99.2%	39.4%	36.6%
35-44	96.6%	98.9%	45.6%	38.7%
45-54	95.2%	98.0%	47.9%	41.0%
55-64*	-	-	-	-
Annual household income group				
High	-	98.3%	-	51.0%
Medium	-	98.4%	-	42.0%
Low	-	96.2%	-	26.2%
N/A**	-	94.3%	-	27.9%
Household location				
Urban	97.4%	98.4%	40.3%	36.6%
Suburban*	-	-	-	-
Rural*	-	-	-	-
Total	97.2%	98.5%	39.5%	36.0%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20662

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Smart TV Owners in Colombia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	55.1%	56.3%
Male	56.5%	57.7%
Age		
16-24	49.7%	50.8%
25-34	56.6%	54.6%
35-44	61.8%	60.9%
45-54	56.5%	63.1%
55-64*	-	-
Annual household income group		
High	-	67.7%
Medium	-	60.3%
Low	-	42.1%
N/A**	-	40.5%
Household location		
Urban	57.2%	58.8%
Suburban	43.1%	43.3%
Rural*	-	-
Total	55.8%	57.0%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20663

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Average Time Spent with Media in Colombia, H1 2019 & H1 2020

hrs:mins per day among internet users

Mobile



Desktop/laptop/tablet



Social networking



Broadcast TV



Music streaming



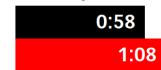
Online TV/streaming



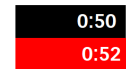
Broadcast radio



Online press



Gaming



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20660

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Traditional Media Users in Colombia, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20668

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Traditional Media Users in Colombia, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	57.3%	62.4%	79.6%	95.4%
Male	62.0%	66.2%	77.9%	92.4%
Age				
16-24	49.9%	58.6%	67.9%	91.2%
25-34	60.3%	59.8%	77.3%	94.0%
35-44	62.1%	68.8%	91.8%	95.1%
45-54	66.4%	71.7%	79.3%	95.9%
55-64*	-	-	-	-
Annual household income group				
High	70.5%	72.1%	83.7%	90.8%
Medium	71.6%	73.6%	86.8%	96.9%
Low	61.2%	69.0%	76.6%	89.5%
N/A**	58.0%	58.3%	77.7%	96.6%
Household location				
Urban	60.1%	65.3%	78.8%	94.7%
Suburban*	-	-	-	-
Rural*	-	-	-	-
Total	59.6%	64.2%	78.8%	94.0%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20667

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TV Viewers in Colombia, by Method, H1 2020

% of internet users

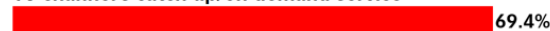
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20661

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Colombia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	91.3%	90.2%
Male	91.3%	93.2%
Age		
16-24	93.3%	93.2%
25-34	93.1%	91.6%
35-44	88.6%	91.2%
45-54	86.9%	93.2%
55-64*	-	-
Annual household income group		
High	-	94.6%
Medium	-	91.0%
Low	-	91.1%
N/A**	-	83.9%
Household location		
Urban	91.7%	92.3%
Suburban*	-	-
Rural*	-	-
Total	91.3%	91.7%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20665

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Social Media Users in Colombia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	91.4%	91.5%
Male	89.5%	91.1%
Age		
16-24	90.2%	90.8%
25-34	89.7%	89.8%
35-44	90.8%	93.6%
45-54	92.7%	92.1%
55-64*	-	-
Annual household income group		
High	-	90.1%
Medium	-	90.9%
Low	-	92.9%
N/A**	-	88.0%
Household location		
Urban	90.9%	91.2%
Suburban	87.8%	93.7%
Rural*	-	-
Total	90.5%	91.3%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20664

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Digital Audio Listeners in Colombia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	74.0%	77.5%
Male	75.5%	79.7%
Age		
16-24	82.0%	80.6%
25-34	79.9%	84.5%
35-44	73.0%	79.0%
45-54	62.4%	70.6%
55-64*	-	-
Annual household income group		
High	-	76.3%
Medium	-	77.4%
Low	-	75.1%
N/A**	-	65.3%
Household location		
Urban	75.1%	79.3%
Suburban*	-	-
Rural*	-	-
Total	74.7%	78.6%

Note: services include Amazon Music Unlimited, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20669

www.eMarketer.com

Voice Search Users in Colombia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	37.6%	38.8%
Male	45.0%	44.5%
Age		
16-24	46.9%	46.9%
25-34	45.2%	44.9%
35-44	37.4%	43.0%
45-54	32.8%	32.0%
55-64*	-	-
Annual household income group		
High	-	47.3%
Medium	-	38.6%
Low	-	39.2%
N/A**	-	33.8%
Household location		
Urban	41.5%	41.4%
Suburban*	-	-
Rural*	-	-
Total	41.2%	41.5%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20666

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KEY FEATURES

Generational divides persist in some audio and video habits.

- Broadcast TV is still a key media experience in Denmark. In H1 2020, 82.7% of internet users ages 16 to 64 watched live TV in the prior month, with higher penetration among older cohorts, according to GlobalWebIndex. Overall, 55.2% of respondents had watched broadcasters' catch-up or on-demand services—a gain of 5 percentage points since 2019.
- Meanwhile, digital video extended its reach. In H1 2020, 88.6% of internet users viewed some form of digital video in the prior month, compared with 87.7% in H1 2019. Uptake of subscription video-on-demand (SVOD) services like Netflix increased more steeply (from 72.8% to 77.1%).
- Internet users ages 16 to 24 were the standout consumers of overall video streaming and SVOD, recording usage above 96% for each.
- GlobalWebIndex found major age-related variations in digital audio consumption, too. Overall, 65.4% of internet users polled in Denmark streamed music, podcasts, or other digital audio content in the prior month, compared with 61.1% in H1 2019. But usage among those 16 to 24 remained far greater, approaching 93%. For respondents ages 45 and older, penetration was up by several percentage points, but still below average.

Older individuals, affluents, and urban dwellers still comprise the majority of traditional media audiences.

- In Q1 2020, 76.3% of internet users ages 16 to 64 listened to broadcast radio in the month prior to polling. Higher penetration correlated directly with rising age and income, but was highest of all in rural areas, at 90.1%.

- While penetration of radio was down marginally in H1 2020, newspaper readership actually rose by 2.3 percentage points to 56.1%, partly due to a more acute need for information amid the pandemic. Yet internet users ages 55 to 64 were more than twice as likely to have read a print newspaper in the prior month as those in the 16-to-24 age group. As in H1 2019, more than two-thirds of affluent respondents were print newspaper readers. Engagement was also higher in urban and rural areas than in the suburbs.
- Magazine readership, by contrast, posted significantly lower penetration this year, at 50.5% overall. Again, readership was higher than average among older respondents (67.9%), affluents (59.0%), and rural households (53.3%).
- Whatever the comparative fortunes of newspapers and magazines in print format, internet users in Denmark spent an average of 40 minutes per day with print in H1 2020. That was sharply down from 51 minutes in 2019, but time spent with online press also declined.

Internet users still spend an hour more each day with PCs and tablets than with mobile phones.

- More than 77% of internet users in Denmark owned a desktop or laptop in H1 2020, a 2.5 percentage point increase since H1 2019, and that share was close to uniform across demographic groups. Tablet penetration fell slightly to 54.7%, and ownership remained concentrated among older, more affluent respondents.
- Fully 96.0% of internet users owned a smartphone, the most widely used device by a large margin. Here too, penetration was similar across all age groups, income brackets, and household locations. Feature phone ownership fell from 11.6% to 10.1%.
- Together, PCs and tablets claimed the greatest single share of media time per day at 3 hours, 2 minutes (3:02). Mobile phones accounted for 2:05 daily.
- Daily engagement with social media added up to 1:36, essentially identical to time spent with social in 2019. But penetration of social networking increased 2.9 percentage points, to 84.6%.
- Among newer digital devices, smart TVs were the clear winner in terms of popularity. Half (49.9%) of respondents owned a smart TV in H1 2020. On the other hand, TV streaming sticks posted the greatest increase in device penetration during the year from 32.5% to 37.7%.

- Other advanced gadgets haven't yet achieved substantial market share. Some 12.2% of internet users owned a smartwatch in H1 2020, compared with one in 10 last year. Penetration of smart home products, such as energy consumption monitors, reached 10.9%, higher than smart wristbands at 10.0%.

Device Ownership in Denmark, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	94.6%	96.0%
Desktop/laptop	74.9%	77.4%
Tablet	56.0%	54.7%
Smart TV	46.4%	49.9%
TV streaming stick/device	32.5%	37.7%
Game console	31.0%	31.0%
Smartwatch	10.1%	12.2%
Smart home device	9.5%	10.9%
Feature phone	11.6%	10.1%
Smart wristband	9.5%	10.0%
VR headset/device	3.8%	3.4%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20549

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Smartphone and Tablet Owners in Denmark, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.5%	97.3%	58.3%	57.9%
Male	92.8%	94.8%	53.8%	51.6%
Age				
16-24	94.7%	93.8%	45.0%	38.5%
25-34	95.2%	96.9%	49.3%	46.8%
35-44	95.5%	97.6%	59.1%	63.6%
45-54	95.9%	97.9%	63.6%	63.2%
55-64	91.5%	93.8%	62.3%	60.5%
Annual household income group				
High	95.6%	98.2%	72.2%	71.2%
Medium	93.8%	95.4%	57.1%	57.6%
Low	95.3%	94.9%	43.8%	39.5%
N/A*	94.6%	96.1%	51.4%	48.0%
Household location				
Urban	94.5%	96.6%	55.3%	52.7%
Suburban	95.9%	95.2%	56.5%	55.4%
Rural	93.9%	95.3%	57.6%	59.6%
Total	94.6%	96.0%	56.0%	54.7%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20674

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Smart TV Owners in Denmark, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	47.1%	48.4%
Male	45.7%	51.3%
Age		
16-24	35.5%	39.2%
25-34	45.6%	49.5%
35-44	49.4%	51.6%
45-54	50.8%	55.8%
55-64	50.4%	52.9%
Annual household income group		
High	55.5%	57.7%
Medium	49.9%	54.3%
Low	37.0%	40.5%
N/A*	40.1%	42.8%
Household location		
Urban	47.2%	50.9%
Suburban	48.3%	45.9%
Rural	42.0%	51.0%
Total	46.4%	49.9%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

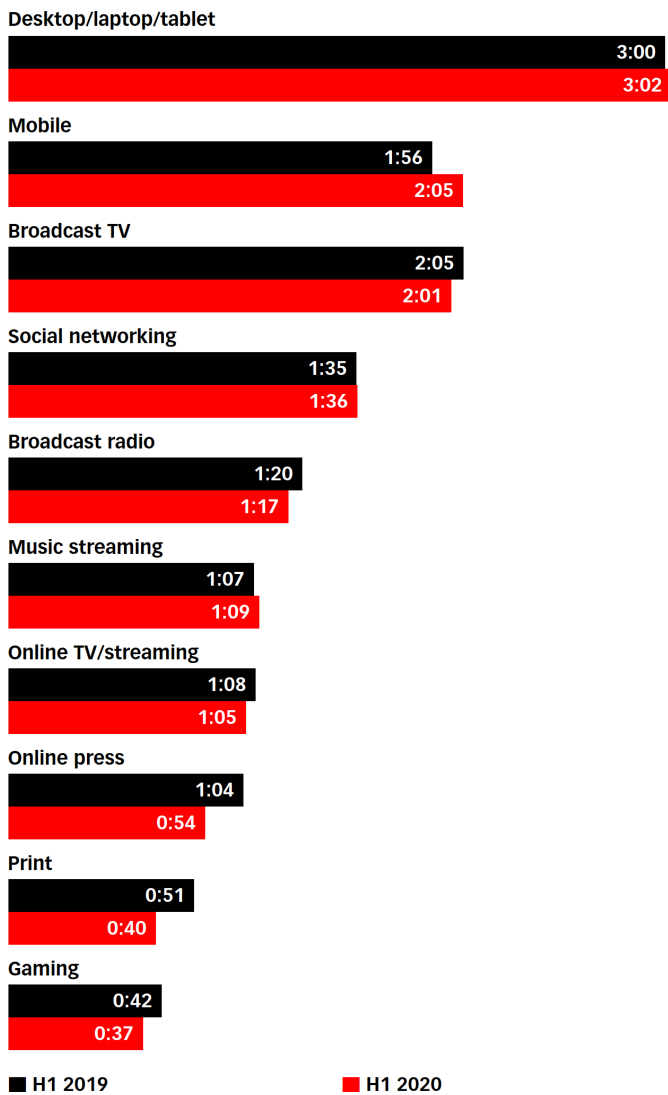
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20675

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Average Time Spent with Media in Denmark, H1 2019 & H1 2020

hrs:mins per day among internet users



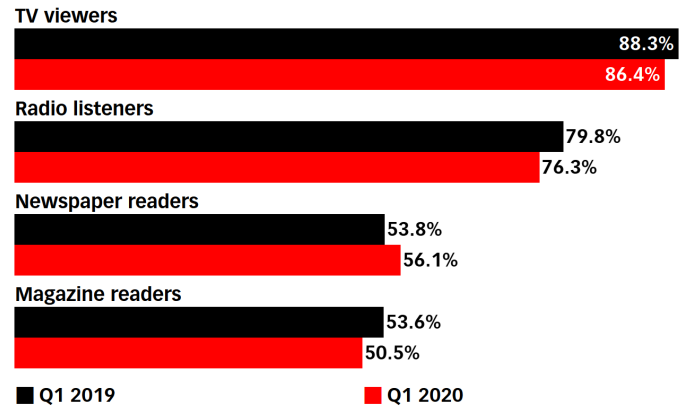
Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20672

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Traditional Media Users in Denmark, Q1 2019 & Q1 2020

% of internet users



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20680

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Traditional Media Users in Denmark, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	50.4%	52.4%	79.6%	89.0%
Male	50.6%	59.8%	73.0%	83.9%
Age				
16-24	36.7%	35.3%	60.9%	67.3%
25-34	45.4%	51.6%	73.6%	85.2%
35-44	49.1%	49.9%	75.4%	87.7%
45-54	54.2%	68.7%	83.2%	96.6%
55-64	67.9%	75.2%	88.5%	95.3%
Annual household income group				
High	59.0%	67.3%	82.8%	85.8%
Medium	56.0%	62.3%	81.5%	92.2%
Low	38.7%	40.2%	69.0%	82.3%
N/A*	46.2%	53.8%	66.2%	81.2%
Household location				
Urban	51.7%	56.2%	73.5%	82.5%
Suburban	42.6%	46.0%	69.2%	88.2%
Rural	53.3%	63.8%	90.1%	96.8%
Total	50.5%	56.1%	76.3%	86.4%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20679

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TV Viewers in Denmark, by Method, H1 2020

% of internet users

Broadcast live on TV channel

82.7%

SVOD*

77.1%

TV channel's catch-up/on-demand service

55.2%

Recorded from TV

31.0%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20673

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Video-on-Demand (VOD) Viewers in Denmark, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	87.4%	87.8%
Male	88.0%	89.4%
Age		
16-24	98.2%	98.4%
25-34	94.2%	95.9%
35-44	91.7%	90.3%
45-54	80.8%	83.9%
55-64	73.7%	74.4%
Annual household income group		
High	89.7%	89.2%
Medium	86.5%	90.7%
Low	90.6%	88.8%
N/A*	81.9%	81.7%
Household location		
Urban	88.1%	90.9%
Suburban	91.4%	84.6%
Rural	83.4%	86.3%
Total	87.7%	88.6%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20677

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Digital Audio Listeners in Denmark, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	58.9%	62.1%
Male	63.4%	68.6%
Age		
16-24	93.4%	92.8%
25-34	75.2%	81.1%
35-44	61.9%	65.2%
45-54	44.7%	49.6%
55-64	30.5%	38.9%
Annual household income group		
High	62.4%	64.6%
Medium	55.7%	65.3%
Low	68.5%	67.2%
N/A*	57.8%	62.7%
Household location		
Urban	67.6%	72.2%
Suburban	55.6%	59.1%
Rural	49.0%	52.7%
Total	61.1%	65.4%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal, YouSee Musik and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20681

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Voice Search Users in Denmark, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	14.6%	13.7%
Male	23.6%	23.9%
Age		
16-24	29.4%	32.8%
25-34	30.0%	21.5%
35-44	20.3%	17.7%
45-54	12.2%	14.0%
55-64	5.7%	7.1%
Annual household income group		
High	19.1%	19.3%
Medium	19.5%	19.2%
Low	21.0%	21.0%
N/A*	14.8%	12.7%
Household location		
Urban	21.8%	23.0%
Suburban	15.7%	15.4%
Rural	14.7%	10.7%
Total	19.1%	18.9%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20678

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KEY FEATURES

Broadcast TV still reaches more viewers than digital video, but that gap is narrowing.

- In H1 2020, nearly 88% of internet users ages 16 to 64 watched live TV in the month prior to polling, according to GlobalWebIndex. Additionally, 55.4% of respondents used broadcasters' on-demand or catch-up services.
- Digital video viewing still lagged TV viewing in Egypt, but the gap is shrinking. Some 77.0% of internet users streamed video-on-demand (VOD) content of some kind in the prior month. VOD penetration was greater among respondents in low-income households and suburbanites.
- The audience for subscription VOD (SVOD) was limited, at 46.8% of internet users. However, that share increased by 6.2 percentage points year over year (YoY).

Smartphones continue to dominate, while PCs and tablets may have reached a saturation point.

- Smartphones have been nearly universal among internet users in Egypt for some time. According to GlobalWebIndex, 95.8% of internet users ages 16 to 64 owned a smartphone H1 2020.
- Mobile devices claimed the largest single slice of respondents' media time, at 3 hours, 57 minutes (3:57) daily. That was 10 minutes less than last year, but time spent with PCs and tablets also dropped during the same period, and by more than 30 minutes.
- Given the near ubiquity of smartphones and a youthful bias in the survey sample, it's no surprise that desktop/laptop ownership is less common. In fact, the share of internet users owning a PC dropped by nearly 10 percentage points between H1 2019 and H1 2020, to 61.5%. Tablet penetration declined slightly as well, to 23.4%. However, ownership of both devices remained higher among older and more affluent internet users, and those living in cities—key targets for many advertisers.

- While PCs and tablets seem to be losing favor, smart TVs too may be nearing their peak. Some 24.7% of respondents owned a smart TV in H1 2020. That said, web-enabled TVs were more popular among females than males, and ownership was especially high among internet users in high-income households (36.9%).
- Many other advanced devices are also struggling to win friends. As in 2019, fewer than 4% of internet users in Egypt owned a TV streaming stick or a virtual reality (VR) headset this year. Penetration rates for smartwatches and smart home products were essentially unchanged from last year, at 6.6% and 5.0%, respectively.

Social platforms contribute massively to digital (and total) time spent, though engagement seems to have lessened during lockdown.

- In H1 2020, 85.7% of respondents had used social media within the past month and spent an average 2:40 per day with social sites. This included use of YouTube, which GlobalWebIndex categorizes as a social network. Daily time spent had decreased by more than 20 minutes YoY.
- Gaming occupied more time among Egypt's internet users than their counterparts in many other countries. In H1 2020, survey respondents estimated that gaming consumed 1:18 each day, on average—almost as much as online video (1:21).
- Between H1 2019 and H1 2020, daily time spent with broadcast radio remained effectively unchanged at 0:46, while daily time spent streaming music climbed by a few minutes, to 1:16. GlobalWebIndex also measured podcast consumption in 2020 for the first time; in Egypt, podcasts accounted for 49 minutes daily on average.
- Similarly, online press accounted for more time per day than print press, at 1:23 and 46 minutes, respectively. But both values rose from H1 2019.

Device Ownership in Egypt, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	97.1%	95.8%
Desktop/laptop	71.4%	61.5%
Smart TV	25.7%	24.7%
Tablet	25.0%	23.4%
Feature phone	16.5%	14.7%
Game console	9.0%	8.5%
Smartwatch	6.6%	6.6%
Smart home device	5.2%	5.0%
Smart wristband	3.7%	5.0%
VR headset/device	3.0%	3.9%
TV streaming stick/device	3.7%	3.6%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20550 www.eMarketer.com

Smartphone and Tablet Owners in Egypt, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	97.8%	97.2%	29.9%	28.1%
Male	96.5%	94.7%	21.2%	20.0%
Age				
16-24	97.2%	96.5%	18.4%	13.5%
25-34	97.4%	94.3%	22.1%	24.8%
35-44	97.9%	97.1%	38.4%	36.3%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	98.1%	97.6%	38.7%	36.2%
Medium	97.1%	96.9%	23.4%	26.5%
Low	96.8%	94.1%	15.0%	15.0%
N/A**	96.4%	95.1%	21.0%	18.7%
Household location				
Urban	97.7%	96.7%	29.5%	27.9%
Suburban	95.2%	93.4%	19.2%	21.2%
Rural	96.5%	94.7%	13.8%	12.1%
Total	97.1%	95.8%	25.0%	23.4%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smart TV Owners in Egypt, H1 2019 & H1 2020

% of internet users, by demographic

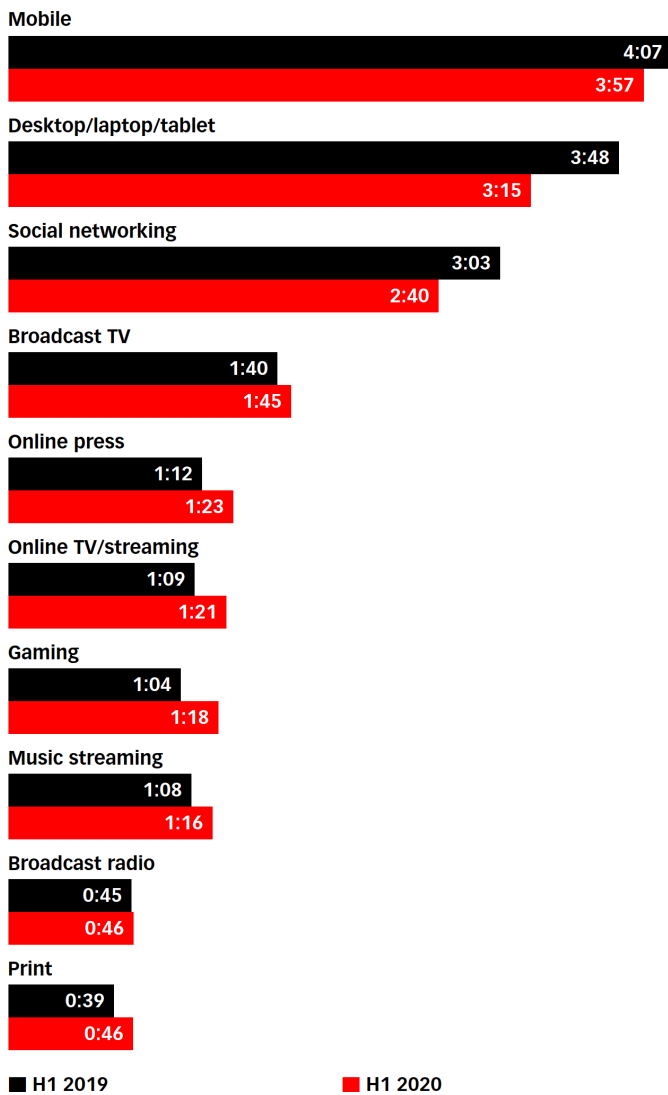
	H1 2019	H1 2020
Gender		
Female	26.7%	29.1%
Male	25.0%	21.4%
Age		
16-24	21.7%	18.4%
25-34	24.9%	28.0%
35-44	31.4%	30.1%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	40.3%	36.9%
Medium	24.7%	29.1%
Low	20.5%	15.0%
N/A**	16.9%	20.0%
Household location		
Urban	28.8%	27.3%
Suburban	25.7%	21.0%
Rural	14.7%	19.7%
Total	25.7%	24.7%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20686 www.eMarketer.com

Average Time Spent with Media in Egypt, H1 2019 & H1 2020

hrs:mins per day among internet users



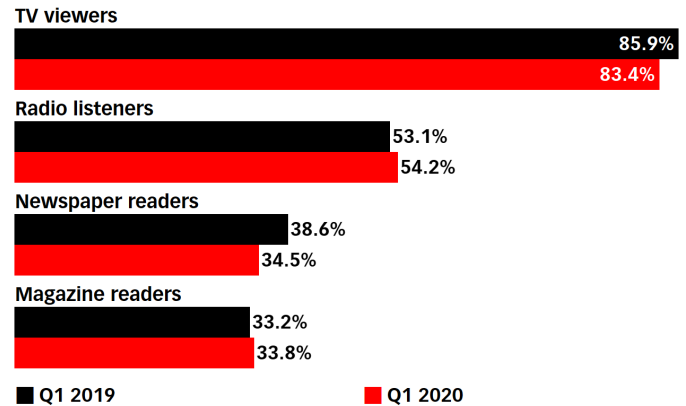
Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20683

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Traditional Media Users in Egypt, Q1 2019 & Q1 2020

% of internet users



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20691

www.eMarketer.com

Traditional Media Users in Egypt, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	32.2%	28.4%	46.5%	84.2%
Male	35.0%	39.0%	60.0%	82.8%
Age				
16-24	28.7%	23.9%	39.7%	76.8%
25-34	40.0%	45.3%	66.9%	87.0%
35-44	38.5%	40.5%	71.1%	92.6%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	42.1%	41.8%	66.5%	82.6%
Medium	34.5%	37.0%	57.9%	88.9%
Low	39.8%	41.9%	54.6%	87.1%
N/A**	20.7%	19.5%	41.0%	76.5%
Household location				
Urban	33.7%	37.1%	54.9%	86.6%
Suburban	45.7%	35.8%	58.9%	78.7%
Rural	24.6%	25.4%	48.5%	77.3%
Total	33.8%	34.5%	54.2%	83.4%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20690

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TV Viewers in Egypt, by Method, H1 2020

% of internet users

Broadcast live on TV channel

87.7%

TV channel's catch-up/on-demand service

55.4%

Recorded from TV

53.0%

SVOD*

46.8%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20684

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Egypt, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	76.4%	75.3%
Male	81.2%	78.3%
Age		
16-24	80.5%	77.3%
25-34	82.4%	80.6%
35-44	73.1%	76.5%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	86.0%	79.8%
Medium	78.8%	74.7%
Low	87.1%	87.6%
N/A**	65.6%	70.6%
Household location		
Urban	79.6%	76.0%
Suburban	77.4%	83.6%
Rural	79.0%	75.2%
Total	79.1%	77.0%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20688

www.eMarketer.com

Social Media Users in Egypt, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	87.0%	84.8%
Male	85.9%	86.4%
Age		
16-24	85.4%	84.6%
25-34	87.8%	85.8%
35-44	87.5%	84.8%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	88.5%	89.2%
Medium	86.4%	85.4%
Low	85.2%	86.3%
N/A**	85.3%	83.4%
Household location		
Urban	87.3%	86.8%
Suburban	82.8%	85.5%
Rural	86.3%	82.4%
Total	86.4%	85.7%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20687

www.eMarketer.com

Digital Audio Listeners in Egypt, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	87.6%	81.3%
Male	86.7%	89.0%
Age		
16-24	91.7%	89.7%
25-34	89.4%	88.5%
35-44	83.0%	84.5%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	89.4%	86.4%
Medium	87.8%	87.8%
Low	90.1%	94.5%
N/A**	81.2%	75.8%
Household location		
Urban	87.8%	85.7%
Suburban	89.0%	90.5%
Rural	82.7%	82.4%
Total	87.1%	85.7%

Note: services include Anghami, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20692

www.eMarketer.com

Voice Search Users in Egypt, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	27.3%	29.3%
Male	39.4%	35.8%
Age		
16-24	35.3%	35.3%
25-34	38.4%	37.3%
35-44	33.9%	29.0%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	41.9%	42.2%
Medium	32.2%	28.8%
Low	34.7%	40.8%
N/A**	28.4%	24.5%
Household location		
Urban	34.3%	31.7%
Suburban	38.6%	36.6%
Rural	34.4%	30.7%
Total	34.3%	33.0%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20689

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KEY FEATURES**Smartphones continue to widen the ownership gap with PCs.**

- In 2019, the share of internet users ages 16 to 64 in France who owned a smartphone finally surpassed the share who owned a PC, according to GlobalWebIndex. In H1 2020, that gap increased, with ownership levels at 95.1% for smartphones and 82.8% for PCs. As a result, age-related differences in smartphone penetration are no longer very substantial. Meanwhile, feature phones have become quite rare. Just 7.3% of respondents had one this year; owners were concentrated among internet users ages 55 to 64 and those living in lower-income homes.
- Tablet ownership was up very slightly, at 50.5%. The share of internet users who owned a gaming console reached 41.9%. Smartwatches and smart wristbands also proved marginally more popular than in 2019, though penetration of both remained below 9%. Similarly, smart home products—such as remotely controlled energy monitors or security installations—did not yet reach 10%. Fewer than 4% of respondents had a virtual reality (VR) headset or similar device.
- Nearly 30% of internet users said they owned a smart TV—a greater share than in H1 2019, but that was still well below the level reported in several other Western European countries. In Belgium, Germany, and Ireland, for example, ownership has been above 40% since 2019, and in Denmark it reached 49.9% this year.
- Daily time spent with larger digital screens (desktops, laptops, and tablets) remained considerably higher than time spent with mobile devices, at an average of 3 hours, 12 minutes (3:12) and 2:10, respectively. However, PC time had remained static; mobile time had risen 23 minutes from the prior year.

Traditional media retains a firm hold on many internet users in France.

- Broadcast TV and radio still attract major audiences in France. Some 93.0% of internet users ages 16 to 64 had watched live TV in the month prior to polling, and 80.2% had listened to radio. Daily TV consumption averaged 2:37 in H1 2020, and radio at 1:02.



- To date, print newspapers and magazines have also maintained a significant market presence—read by 51.4% and 54.0% of internet users, respectively, in the month prior to polling. But both print formats are now gradually losing readers, as more consumption shifts online.
- Time spent with print press and online publications both increased slightly in H1 2020, to 26 minutes and 35 minutes, respectively.

Changes in 2020 centered on new behaviors, not new devices.

- Nearly 84% of internet users polled in France in H1 2020 streamed digital video in the previous month—a rise of 3.2 percentage points compared with H1 2019. The share who streamed music, podcasts, or other digital audio content jumped from 50.5% to 58.2% year over year.
- But the most dramatic leap occurred with subscription video-on-demand (SVOD) services, such as Netflix and Amazon Prime Video. Last year, fewer than half (49.0%) of internet users watched paid-for video content in the month prior to polling; in H1 2020, the share was 61.6%—one of the largest differences GlobalWebIndex found in any metric for any country surveyed. That said, many of the correlations that were noted in 2019 between SVOD and demographic traits persisted in 2020. Respondents ages 16 to 34, the affluent, and those living in urban areas were much more likely than other cohorts to access SVOD.
- Social media also registered a boost in H1 2020, as the proportion of internet users visiting Facebook, Instagram, or other social platforms in the prior month rose to 82.8%. As with smartphone ownership and live TV viewing, takeup was very similar across all ages, income levels, and household locations.

Device Ownership in France, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	92.3%	95.1%
Desktop/laptop	85.8%	82.8%
Tablet	49.6%	50.5%
Game console	40.3%	41.9%
Smart TV	27.9%	29.5%
TV streaming stick/device	9.4%	10.4%
Smart home device	8.0%	9.5%
Smartwatch	6.7%	8.6%
Smart wristband	6.3%	8.4%
Feature phone	8.2%	7.3%
VR headset/device	4.0%	3.9%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20551

www.eMarketer.com

Smartphone and Tablet Owners in France, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	92.4%	95.1%	50.3%	50.4%
Male	92.2%	95.1%	48.9%	50.6%
Age				
16-24	97.6%	96.8%	42.5%	41.1%
25-34	94.9%	96.8%	48.8%	49.2%
35-44	94.0%	96.1%	55.3%	55.3%
45-54	88.4%	93.9%	49.9%	51.2%
55-64	85.8%	91.4%	51.2%	55.5%
Annual household income group				
High	95.1%	96.7%	60.8%	59.8%
Medium	92.9%	95.1%	54.7%	53.3%
Low	90.3%	93.8%	39.7%	40.6%
N/A*	90.1%	94.0%	42.4%	43.6%
Household location				
Urban	93.5%	95.5%	49.1%	49.5%
Suburban	92.9%	94.7%	48.0%	53.6%
Rural	90.3%	94.5%	50.9%	50.7%
Total	92.3%	95.1%	49.6%	50.5%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20696

www.eMarketer.com

Smart TV Owners in France, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	24.8%	26.7%
Male	31.0%	32.3%
Age		
16-24	25.2%	26.3%
25-34	31.7%	32.1%
35-44	30.0%	30.2%
45-54	27.4%	29.8%
55-64	24.6%	28.8%
Annual household income group		
High	36.3%	35.7%
Medium	30.4%	30.4%
Low	22.1%	23.7%
N/A*	20.2%	25.6%
Household location		
Urban	28.2%	28.9%
Suburban	30.8%	31.4%
Rural	26.5%	29.6%
Total	27.9%	29.5%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20697

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Average Time Spent with Media in France, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Broadcast TV



Mobile



Social networking



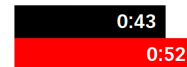
Broadcast radio



Music streaming



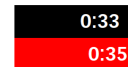
Gaming



Online TV/streaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20694

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Traditional Media Users in France, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Magazine readers



Newspaper readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20702

www.eMarketer.com

Traditional Media Users in France, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	51.2%	47.4%	80.9%	91.3%
Male	56.8%	55.2%	79.4%	89.4%
Age				
16-24	38.2%	37.9%	66.1%	84.1%
25-34	48.7%	44.9%	76.6%	87.4%
35-44	54.5%	55.0%	84.8%	91.3%
45-54	58.5%	55.8%	86.8%	93.3%
55-64	71.4%	63.9%	86.1%	96.0%
Annual household income group				
High	65.4%	61.4%	87.5%	92.7%
Medium	54.1%	52.2%	83.7%	91.4%
Low	45.5%	42.9%	71.1%	87.9%
N/A*	42.4%	42.2%	72.7%	87.0%
Household location				
Urban	54.1%	51.1%	76.2%	89.4%
Suburban	59.4%	52.4%	84.4%	91.5%
Rural	51.7%	51.3%	84.3%	91.3%
Total	54.0%	51.4%	80.2%	90.4%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20701

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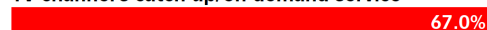
TV Viewers in France, by Method, H1 2020

% of internet users

Broadcast live on TV channel



TV channel's catch-up/on-demand service



SVOD*



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20695

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Video-on-Demand (VOD) Viewers in France, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	80.7%	83.0%
Male	80.1%	84.3%
Age		
16-24	91.1%	94.7%
25-34	87.6%	91.8%
35-44	80.0%	83.5%
45-54	73.8%	76.2%
55-64	68.6%	71.2%
Annual household income group		
High	84.9%	86.9%
Medium	79.5%	83.1%
Low	78.9%	81.9%
N/A*	75.7%	80.0%
Household location		
Urban	83.8%	86.9%
Suburban	79.0%	81.9%
Rural	76.1%	79.7%
Total	80.4%	83.6%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20699

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Social Media Users in France, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	79.3%	83.7%
Male	78.4%	82.0%
Age		
16-24	87.5%	88.0%
25-34	83.1%	87.4%
35-44	78.8%	84.1%
45-54	73.3%	78.1%
55-64	70.8%	76.2%
Annual household income group		
High	81.2%	84.0%
Medium	79.0%	83.0%
Low	77.5%	82.6%
N/A*	76.7%	78.8%
Household location		
Urban	81.0%	84.0%
Suburban	80.6%	84.1%
Rural	74.9%	80.6%
Total	78.8%	82.8%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Copains d'avant, Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20698

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Digital Audio Listeners in France, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	45.9%	53.9%
Male	55.0%	62.4%
Age		
16-24	78.4%	82.0%
25-34	59.8%	69.9%
35-44	48.3%	56.7%
45-54	37.1%	45.1%
55-64	27.0%	36.3%
Annual household income group		
High	56.5%	62.8%
Medium	46.9%	55.8%
Low	48.4%	57.0%
N/A*	50.2%	54.4%
Household location		
Urban	55.4%	64.0%
Suburban	52.2%	56.4%
Rural	42.8%	50.6%
Total	50.5%	58.2%

Note: services include Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20703

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Voice Search Users in France, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	20.0%	22.0%
Male	28.1%	30.3%
Age		
16-24	40.9%	42.8%
25-34	28.6%	31.9%
35-44	23.7%	24.9%
45-54	16.5%	19.0%
55-64	10.7%	11.8%
Annual household income group		
High	28.0%	28.7%
Medium	20.7%	23.4%
Low	23.2%	26.4%
N/A*	24.7%	25.6%
Household location		
Urban	28.4%	31.0%
Suburban	23.5%	24.9%
Rural	17.9%	19.7%
Total	24.1%	26.1%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20700

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KEY FEATURES

In Germany, as in France, many internet users have remained loyal to traditional media.

- Print newspapers still boast sizable audiences in Germany. As of Q1 2020, 64.6% of internet users ages 16 to 64 read a print newspaper in the month prior to polling, GlobalWebIndex and Publicis Media reported. Usage did vary across age groups, though, ranging from 51.9% among 16- to 24-year-olds to 75.1% among those 55 to 64.
- The reach of live TV stood at 88.6% of internet users in Q1 2020—virtually the same as in Q1 2019. The average time spent each day with broadcast TV also remained unchanged, at 2 hours, 16 minutes (2:16).
- Magazine readership fell by 3.2 percentage points during the year, to 60.2% in Q1 2020. Age differentials were more significant here—over 72% of the oldest respondents (55 to 64) read a print magazine in the month prior, compared with 41.3% of those 16 to 24. The reach of both newspapers and magazines remained higher in more affluent households, too.
- Broadcast radio also showed some signs of attrition. Yet penetration was still healthy, at 80.8%. As in the past, older internet users and those in affluent homes were more likely to be radio listeners than younger respondents and those with lower incomes.

Attention is focused on smartphones, PCs, and tablets. Many other digital devices attract little interest.

- It wasn't always the case, but smartphones are now almost ubiquitous among internet users in Germany. In H1 2020, 95.2% of those polled owned a smartphone. A mere 2.5% had a feature phone—one of the lowest percentages recorded anywhere for this metric by GlobalWebIndex.

- As smartphones consolidated their position at the top of the device hierarchy, the share of internet users owning a PC fell, though only slightly. Some 86.1% of respondents owned a desktop or laptop in H1 2020. Penetration varied little across demographics; only the 55-to-64 group posted ownership above 90%. More than half (52.3%) of internet users owned a tablet.
- Notwithstanding Germany's high smartphone penetration, many consumers don't spend a great deal of time on their phones. The average time spent per day with mobile was 2:05—a full hour less than the 3:05 spent each day with desktops/laptops and tablets, and also less than time with broadcast TV (2:16).
- Web users continue to resist the appeal of some newer digital devices, partly because of data privacy and security concerns. This year, smartwatches, smart wristbands, and smart home products registered penetration rates of 13.1%, 10.5%, and 9.2%, respectively. As in 2019, affluent users were more likely to own any of these items.

Younger internet users are driving a broader transformation of viewing and listening habits.

- While many advanced digital gadgets are languishing on suppliers' shelves, smart TVs are entering Germany's homes in ever-greater numbers. More than half (50.8%) of internet users polled in H1 2020 owned a smart TV—a gain of 3.7 percentage points year over year (YoY), according to GlobalWebIndex. Predictably, ownership was greater among respondents in middle- and high-income households, and those ages 35 to 54. But even in the 16-to-24 age bracket, more than 45% of internet users had a connected TV.
- Smart TVs are merely one element in a rapidly changing landscape of options for visual entertainment. Two-thirds (66.3%) of internet users in Germany used broadcasters' on-demand services in the month prior. And 77.5% of respondents streamed video content of some kind in the previous month, as the average time spent each day with online video rose to 1:00.

- A more dramatic shift is underway with subscription video-on-demand (SVOD). Between 2019 and 2020, the share of survey respondents watching services such as Amazon Prime Video and Netflix in the prior month jumped from 56.1% to 64.7%. Among internet users ages 16 to 24, a remarkable 93.2% had viewed SVOD. (Amazon Prime Video has been a key player in Germany for years, building on a large preexisting audience of Amazon ecommerce customers.)
- Digital audio consumption also rose substantially YoY, across all demographics. In total, 58.1% of internet users said they had streamed music, podcasts, or other audio content from digital sources. These behaviors still correlate strongly with age, however, with penetration ranging from 89.4% of 16- to 24-year-olds to just 31.0% of those 55 to 64.

Device Ownership in Germany, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	93.6%	95.2%
Desktop/laptop	87.9%	86.1%
Tablet	52.2%	52.3%
Smart TV	47.1%	50.8%
Game console	35.2%	36.0%
TV streaming stick/device	20.8%	22.5%
Smartwatch	9.6%	13.1%
Smart wristband	9.7%	10.5%
Smart home device	7.8%	9.2%
VR headset/device	3.6%	3.1%
Feature phone	2.9%	2.5%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20552

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Smartphone and Tablet Owners in Germany, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	94.1%	95.8%	51.8%	52.9%
Male	93.1%	94.6%	52.6%	51.7%
Age				
16-24	97.9%	96.8%	47.0%	46.7%
25-34	96.5%	96.5%	51.3%	51.9%
35-44	94.8%	96.7%	57.8%	55.3%
45-54	92.5%	95.2%	54.0%	54.7%
55-64	87.0%	91.0%	49.6%	51.4%
Annual household income group				
High	96.0%	96.3%	63.2%	61.0%
Medium	93.9%	95.6%	52.6%	53.5%
Low	91.2%	93.0%	42.7%	41.8%
N/A*	92.5%	96.3%	45.6%	48.0%
Household location				
Urban	93.7%	95.2%	51.6%	50.6%
Suburban	94.0%	95.0%	54.0%	54.1%
Rural	92.9%	95.4%	51.5%	53.9%
Total	93.6%	95.2%	52.2%	52.3%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20707

www.eMarketer.com

Smart TV Owners in Germany, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	43.4%	48.1%
Male	50.6%	53.5%
Age		
16-24	41.5%	45.1%
25-34	48.1%	49.9%
35-44	49.5%	54.3%
45-54	49.6%	53.4%
55-64	45.0%	49.7%
Annual household income group		
High	55.5%	57.7%
Medium	50.5%	55.0%
Low	37.6%	41.5%
N/A*	39.4%	40.2%
Household location		
Urban	47.5%	49.6%
Suburban	49.3%	52.9%
Rural	44.2%	51.0%
Total	47.1%	50.8%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

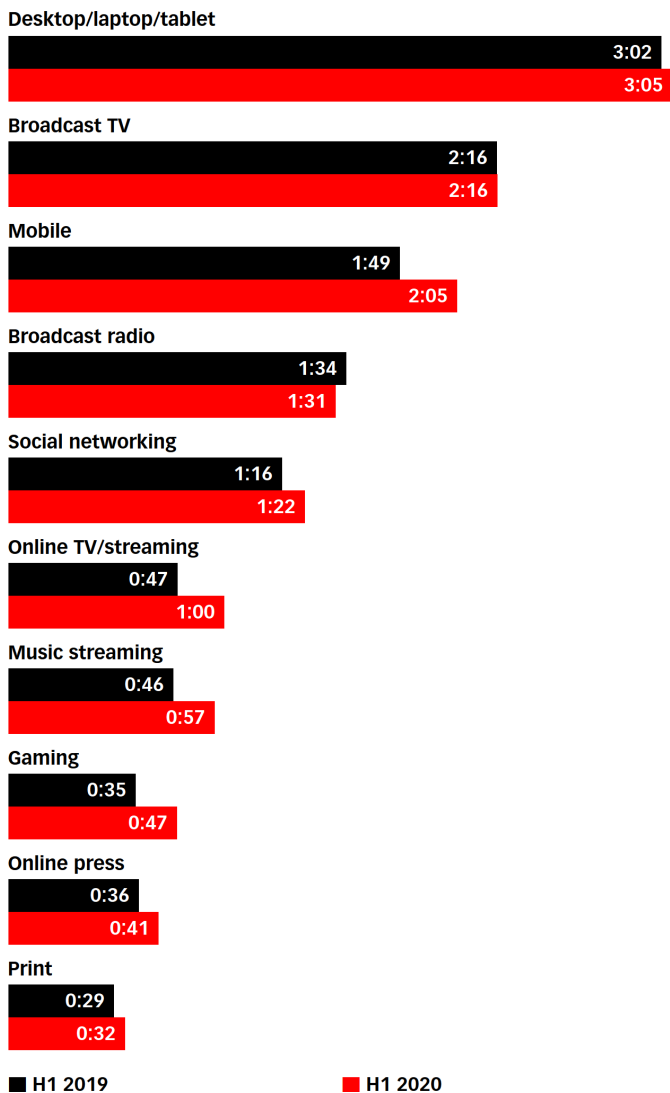
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20708

www.eMarketer.com

Average Time Spent with Media in Germany, H1 2019 & H1 2020

hrs:mins per day among internet users



Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

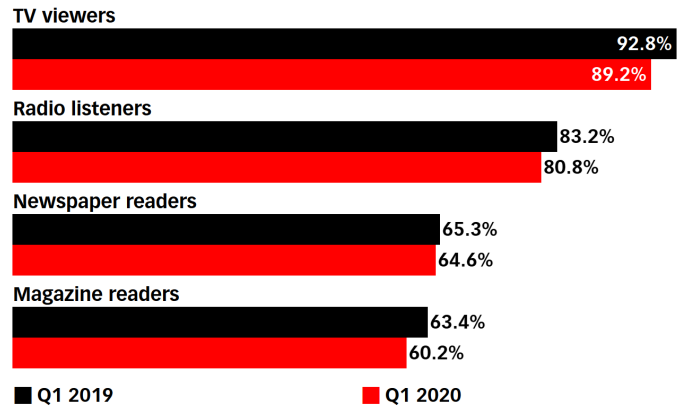
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20705

www.eMarketer.com

Traditional Media Users in Germany, Q1 2019 & Q1 2020

% of internet users



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20713

www.eMarketer.com

Traditional Media Users in Germany, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	58.3%	63.4%	81.6%	90.3%
Male	62.0%	65.8%	80.0%	88.0%
Age				
16-24	41.3%	51.9%	64.9%	76.4%
25-34	56.0%	58.0%	76.5%	84.9%
35-44	60.1%	62.3%	82.5%	90.5%
45-54	66.5%	71.5%	86.8%	94.8%
55-64	72.1%	75.1%	89.0%	95.6%
Annual household income group				
High	68.4%	73.2%	86.7%	91.2%
Medium	62.4%	66.6%	83.9%	90.7%
Low	49.7%	53.7%	71.9%	86.6%
N/A*	54.6%	59.6%	76.6%	84.8%
Household location				
Urban	58.3%	62.6%	77.7%	86.8%
Suburban	61.9%	65.7%	80.0%	90.0%
Rural	62.0%	67.2%	87.3%	92.9%
Total	60.2%	64.6%	80.8%	89.2%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20712

www.eMarketer.com



TV Viewers in Germany, by Method, H1 2020

% of internet users

Broadcast live on TV channel

88.6%

TV channel's catch-up/on-demand service

66.3%

SVOD*

64.7%

Recorded from TV

47.7%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20706

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Germany, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	71.1%	74.7%
Male	77.6%	80.2%
Age		
16-24	92.8%	95.2%
25-34	86.4%	89.9%
35-44	76.4%	78.4%
45-54	67.3%	70.6%
55-64	53.6%	58.1%
Annual household income group		
High	80.3%	81.4%
Medium	74.3%	78.3%
Low	70.7%	73.5%
N/A*	68.2%	72.7%
Household location		
Urban	76.4%	78.8%
Suburban	75.6%	78.8%
Rural	69.7%	73.9%
Total	74.4%	77.5%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20710

www.eMarketer.com

Social Media Users in Germany, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	78.8%	81.6%
Male	77.4%	81.0%
Age		
16-24	89.4%	89.9%
25-34	84.4%	86.0%
35-44	79.6%	82.1%
45-54	73.2%	78.3%
55-64	66.6%	72.4%
Annual household income group		
High	81.2%	83.4%
Medium	77.6%	81.7%
Low	77.5%	79.5%
N/A*	72.4%	77.8%
Household location		
Urban	78.4%	81.4%
Suburban	79.8%	81.8%
Rural	75.9%	80.7%
Total	78.1%	81.3%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, Xing, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20709

www.eMarketer.com

Digital Audio Listeners in Germany, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	48.0%	54.7%
Male	55.2%	61.4%
Age		
16-24	82.4%	89.4%
25-34	65.7%	76.6%
35-44	53.3%	57.5%
45-54	39.6%	44.9%
55-64	24.9%	31.0%
Annual household income group		
High	61.3%	62.1%
Medium	46.9%	56.5%
Low	50.0%	55.9%
N/A*	41.9%	55.1%
Household location		
Urban	54.2%	60.3%
Suburban	52.2%	59.3%
Rural	46.5%	52.9%
Total	51.6%	58.1%

Note: services include Amazon Music Unlimited, Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20714

www.eMarketer.com

Voice Search Users in Germany, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	15.4%	16.9%
Male	23.2%	26.7%
Age		
16-24	29.8%	35.5%
25-34	25.1%	27.8%
35-44	21.5%	23.8%
45-54	14.2%	15.7%
55-64	9.9%	10.8%
Annual household income group		
High	23.8%	25.6%
Medium	17.4%	22.4%
Low	18.7%	19.5%
N/A*	14.7%	14.0%
Household location		
Urban	20.7%	24.3%
Suburban	20.3%	21.4%
Rural	16.1%	18.0%
Total	19.4%	21.9%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20711

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HONG KONG

KEY FEATURES

The most dramatic shifts in Hong Kong's media landscape have been sharp falls in usage of print formats and broadcast radio.

- According to GlobalWebIndex and Publicis Media, 57.9% of internet users ages 16 to 64 polled in Hong Kong during Q1 2020 read a print newspaper in the prior month. The reach of print newspapers had declined by nearly 10 percentage points since Q1 2019—though that metric remained quite high by global standards. Print magazines also suffered with respect to 2019, as readership fell from 58.7% to 50.1%. Youth was a significant indicator: Fewer than 29% of respondents ages 16 to 24 had read either print format.
- Penetration of broadcast radio dropped by almost 5 percentage points during the same period, to less than 50%. Notably, there was no corresponding increase in digital audio takeup; the proportion of respondents listening to streamed music, podcasts, or other digital audio content rose only marginally, from 64.4% to 65.0%.

The TV and video picture is less clear-cut, but gains were made in subscription video-on-demand (SVOD) viewing.

- Even traditional TV viewing was dented, though the decline was minimal, and usage remained high overall. Some 88.7% of internet users in Hong Kong watched live TV in the month prior to polling. Broadcasters' own catch-up and on-demand viewing options remained popular, cited by 68.5% of respondents. That share had dropped by 3.3 percentage points, however. The proportion watching shows they recorded earlier also slipped, from 42.0% in H1 2019 to 36.4% in H1 2020.
- The share of internet users who streamed video content in the prior month (84.5%) fell by nearly 4 percentage points during the year. Hong Kong, like Egypt, was one of very few countries where GlobalWebIndex reported a decline in usage of video streaming in H1 2020.

- But there was a substantial gain in the share who had accessed TV shows, films, or other content from SVOD providers, such as Netflix, to 48.5%.
- As of H1 2020, 37.0% of Hong Kong respondents had invested in a smart TV; again, this value was lower than in H1 2019. Ownership remained much greater in the most affluent homes as well.

There was little change in most patterns of device ownership and media consumption among Hong Kong's internet users.

- For some years, Hong Kong has registered some of world's highest rates of digital device ownership and usage, so it's not surprising to see penetration approaching a plateau in some cases. For example, 96.8% of internet users ages 16 to 64 owned a smartphone in H1 2020—a very slight decline from H1 2019, which may not be statistically significant.
- Over 72% of respondents owned a desktop or laptop in H1 2020, and 53.3% owned a tablet, with both values roughly the same as in 2019. Despite much greater smartphone penetration, PCs and tablets accounted for more media time each day, but by a tiny margin—3 hours, 28 minutes (3:28) per day on average, while mobile activities consumed 3:24.
- Interest in smartwatches was slightly greater this year. Nearly 20% of internet users owned one in H1 2020. Smart wristbands didn't benefit from a similar uplift, though; overall ownership stood at 14.7%. And as in H1 2019, just over 10% of internet users polled had a smart home product.
- More than 84% of internet users were active on social networks during the prior month, with usage fairly uniform across all demographic groups. Moreover, respondents spent more time on social sites—an average of 1:54 per day—than on any other specific activity. It should be noted that GlobalWebIndex includes the video platform YouTube in its social media category, which tends to increase the figures for both engagement and time spent.
- Music streaming, gaming, and digital video took up roughly equal amounts of internet users' time on a typical day in H1 2020, at 54 minutes, 56 minutes, and 1:00, respectively.

Device Ownership in Hong Kong, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	97.5%	96.8%
Desktop/laptop	72.1%	72.3%
Tablet	53.5%	53.3%
Smart TV	37.6%	37.0%
Game console	29.5%	27.9%
Smartwatch	17.9%	19.8%
Smart wristband	14.9%	14.7%
TV streaming stick/device	12.2%	11.2%
Smart home device	10.8%	10.2%
Feature phone	7.0%	6.2%
VR headset/device	4.8%	4.8%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20553

www.eMarketer.com

Smartphone and Tablet Owners in Hong Kong, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	97.8%	96.7%	54.3%	53.5%
Male	97.2%	96.8%	52.6%	53.1%
Age				
16-24	98.5%	98.4%	51.5%	48.8%
25-34	96.7%	96.5%	56.2%	53.7%
35-44	97.3%	96.8%	52.7%	54.7%
45-54	96.8%	97.5%	53.3%	55.0%
55-64	98.7%	95.0%	53.6%	53.0%
Annual household income group				
High	98.3%	96.8%	64.9%	65.1%
Medium	98.6%	97.1%	56.0%	54.4%
Low	96.4%	96.6%	44.4%	42.9%
N/A*	96.2%	96.1%	40.9%	41.6%
Household location				
Urban	97.7%	97.0%	54.6%	53.6%
Suburban	96.6%	95.9%	48.4%	52.1%
Total	97.5%	96.8%	53.5%	53.3%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20718

www.eMarketer.com

Smart TV Owners in Hong Kong, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	37.2%	37.5%
Male	38.1%	36.4%
Age		
16-24	33.2%	33.1%
25-34	39.5%	34.3%
35-44	38.0%	39.8%
45-54	39.7%	37.0%
55-64	36.3%	39.7%
Annual household income group		
High	45.7%	43.8%
Medium	40.9%	40.1%
Low	31.2%	30.8%
N/A*	24.8%	22.6%
Household location		
Urban	38.5%	37.6%
Suburban	33.4%	34.0%
Total	37.6%	37.0%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20719

www.eMarketer.com

Average Time Spent with Media in Hong Kong, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Social networking



Broadcast TV



Online TV/streaming



Gaming



Music streaming



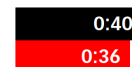
Online press



Broadcast radio



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20716

www.eMarketer.com

Traditional Media Users in Hong Kong, Q1 2019 & Q1 2020 % of internet users

TV viewers



Newspaper readers



Magazine readers



Radio listeners



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20724

www.eMarketer.com

Traditional Media Users in Hong Kong, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	46.3%	53.1%	44.6%	90.3%
Male	54.7%	63.7%	54.8%	88.2%
Age				
16-24	28.6%	27.2%	29.0%	85.4%
25-34	46.7%	46.3%	43.5%	87.4%
35-44	51.8%	60.7%	49.7%	86.8%
45-54	59.8%	70.8%	60.6%	95.3%
55-64	57.1%	75.5%	57.0%	90.3%
Annual household income group				
High	58.6%	68.4%	54.4%	91.6%
Medium	51.3%	56.9%	50.5%	92.7%
Low	45.0%	55.5%	46.8%	84.2%
N/A*	22.6%	20.7%	26.1%	81.3%
Household location				
Urban	48.8%	58.7%	48.7%	88.9%
Suburban	56.5%	53.7%	51.7%	91.5%
Total	50.1%	57.9%	49.2%	89.3%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20723

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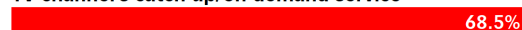
TV Viewers in Hong Kong, by Method, H1 2020

% of internet users

Broadcast live on TV channel



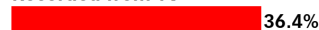
TV channel's catch-up/on-demand service



SVOD*



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20717

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Hong Kong, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	89.3%	85.0%
Male	87.0%	83.8%
Age		
16-24	86.9%	85.0%
25-34	93.7%	89.9%
35-44	91.7%	84.6%
45-54	87.6%	80.9%
55-64	80.6%	82.6%
Annual household income group		
High	88.6%	89.3%
Medium	90.8%	84.8%
Low	87.5%	80.0%
N/A*	79.5%	76.5%
Household location		
Urban	88.9%	85.0%
Suburban	85.6%	81.7%
Total	88.3%	84.5%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20721

www.eMarketer.com

Social Media Users in Hong Kong, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	84.5%	83.5%
Male	84.0%	85.6%
Age		
16-24	82.9%	81.3%
25-34	82.6%	84.4%
35-44	86.5%	83.2%
45-54	85.9%	89.0%
55-64	82.8%	83.1%
Annual household income group		
High	85.3%	87.4%
Medium	87.9%	87.1%
Low	81.4%	81.1%
N/A*	81.3%	76.1%
Household location		
Urban	85.0%	84.6%
Suburban	80.8%	83.7%
Total	84.3%	84.5%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, Youku, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20720

www.eMarketer.com

Digital Audio Listeners in Hong Kong, H1 2018 & H1 2019

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	63.3%	63.7%
Male	65.8%	66.6%
Age		
16-24	83.7%	86.1%
25-34	78.7%	77.0%
35-44	67.7%	66.2%
45-54	55.5%	54.7%
55-64	40.6%	47.1%
Annual household income group		
High	63.8%	69.6%
Medium	63.5%	63.1%
Low	65.3%	61.7%
N/A*	67.3%	66.0%
Household location		
Urban	66.3%	67.0%
Suburban	56.1%	54.8%
Total	64.4%	65.0%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, KuGou, Kuwo, Musify, QQ Music, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20725

www.eMarketer.com

Voice Search Users in Hong Kong, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	32.6%	31.7%
Male	37.7%	39.8%
Age		
16-24	50.1%	50.7%
25-34	41.8%	42.9%
35-44	32.0%	31.3%
45-54	28.8%	29.8%
55-64	27.3%	28.6%
Annual household income group		
High	36.5%	37.1%
Medium	33.5%	32.7%
Low	34.7%	36.0%
N/A*	33.1%	35.4%
Household location		
Urban	35.7%	35.7%
Suburban	30.7%	32.8%
Total	34.9%	35.3%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20722

www.eMarketer.com

KEY FEATURES

Digital devices claim the bulk of media time for internet users in India, but adoption of several devices is reaching a plateau, at least in the short term.

- Many internet users in India were mobile-first, and mobile phones are now central to media experience in the country. Fully 96.0% of internet users ages 16 to 64 owned a smartphone in H1 2020—a figure unchanged since H1 2019. In addition, one in 10 respondents had a feature phone. Time spent with mobile devices averaged 3 hours, 37 minutes (3:37) per day, 1 minute more than in 2019.
- Last year, 72.7% of respondents owned a desktop or laptop, according to GlobalWebIndex. By H1 2020, however, it seems that PC ownership may have already peaked; just 54.2% of internet users owned a PC. Tablet penetration also declined year over year, from 24.5% to 22.3%—though ownership remained higher among older and more affluent respondents, and among females. Time spent with PCs and tablets fell sharply, from 3:37 to 2:52. Social networking accounted for the third-longest period of media engagement daily, at 2:36.
- Despite the omnipresence of smartphones, many internet users in India remain loyal to traditional media, too. Print formats are a prime example. The reach of print newspapers and magazines actually increased in Q1 2020, to 79.4% and 70.5%, respectively. These publications remain especially popular among older respondents and the urban population. That said, more than 72% of internet users ages 16 to 24 also read a print newspaper in the prior month.
- Broadcast TV is also holding its own in a media landscape where digital alternatives are proliferating. In total, 91.7% of internet users ages 16 to 64 watched live TV in the month prior to polling. But many also took advantage of time-shifted viewing; over 78% used broadcasters' catch-up or on-demand services, while 69.8% recorded TV programs to watch later. Both values were more than 3 percentage points higher than in 2019. Moreover, 76.8% of respondents polled in H1 2020 watched films or TV shows via subscription video-on-demand (SVOD) services such as Netflix—a sizable gain compared with 70.6% last year.
- Increases in video viewing were doubtless fueled, at least in part, by several periods of lockdown beginning in late March 2020. And the variety of digital options helped make video streaming marginally more widespread than live TV, according to GlobalWebIndex. In H1 2020, 94.1% of internet users in India streamed VOD content in the prior month. That activity accounted for 1:57 per day, on average, compared with 1:42 devoted to broadcast TV.
- Similarly, more than 60% of the sample listened to broadcast radio in H1 2020, though digital audio reached 89.1% and accounted for longer periods of time. Music streaming alone claimed an average of 2:19 per day, compared with 54 minutes spent with broadcast radio.
- The internet users polled in India have also taken to voice search. Nearly 60% used a voice assistant, such as Siri, Cortana, or a smart speaker device, in the month before the survey. Individuals living in affluent homes posted the highest penetration, at 68.6%, followed by respondents ages 25 to 34 (63.3%) and females (63.0%).
- The proportion of internet users in India who owned a smart TV declined slightly between H1 2019 and H1 2020, to just over 31%. Ownership of TV streaming sticks also showed a marginal fall. Penetration of virtual reality (VR) headsets and smart home products—such as household energy monitors—declined very slightly as well. Ownership of smartwatches and smart wristbands rose to 18.0% and 10.6% of internet users, respectively, but again these changes were marginal.

Device Ownership in India, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	96.0%	96.0%
Desktop/laptop	72.7%	54.2%
Smart TV	31.2%	31.1%
Tablet	24.5%	22.3%
Smartwatch	17.0%	18.0%
TV streaming stick/device	16.2%	16.0%
Game console	16.0%	12.2%
Smart home device	11.9%	11.8%
Smart wristband	10.3%	10.6%
Feature phone	15.4%	10.4%
VR headset/device	6.8%	6.3%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20554

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Smartphone and Tablet Owners in India, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.1%	96.5%	29.8%	26.5%
Male	95.9%	95.8%	22.2%	20.3%
Age				
16-24	96.0%	95.6%	20.5%	18.2%
25-34	96.0%	96.3%	27.7%	23.0%
35-44	96.6%	96.6%	30.5%	28.6%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	97.9%	96.8%	37.6%	31.0%
Medium	97.8%	97.4%	23.4%	21.8%
Low	93.3%	94.4%	16.8%	16.0%
N/A**	92.8%	90.6%	15.2%	14.2%
Household location				
Urban	96.7%	96.5%	27.9%	24.9%
Suburban	95.8%	94.8%	19.7%	20.9%
Rural	92.6%	95.1%	14.5%	11.8%
Total	96.0%	96.0%	24.5%	22.3%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20729

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Smart TV Owners in India, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	36.4%	32.6%
Male	29.0%	30.4%
Age		
16-24	25.9%	25.5%
25-34	37.3%	34.7%
35-44	36.2%	36.4%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	43.0%	33.0%
Medium	32.7%	37.0%
Low	22.6%	26.8%
N/A**	19.1%	21.0%
Household location		
Urban	35.3%	32.8%
Suburban	25.0%	31.2%
Rural	19.3%	23.4%
Total	31.2%	31.1%

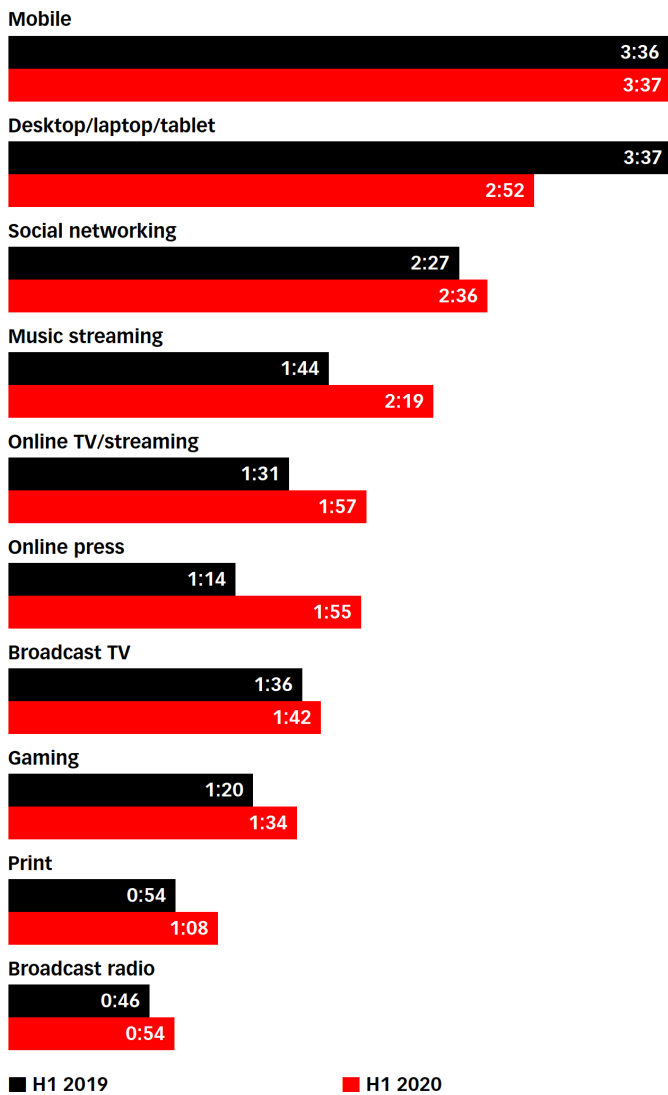
Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20730

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Average Time Spent with Media in India, H1 2019 & H1 2020

hrs:mins per day among internet users



Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

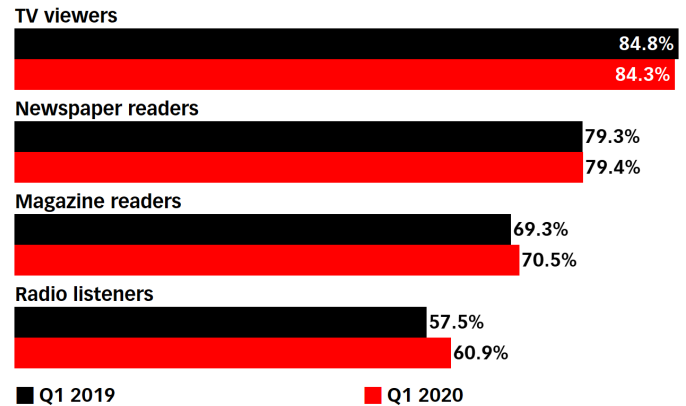
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20727

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Traditional Media Users in India, Q1 2019 & Q1 2020

% of internet users



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20735

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Traditional Media Users in India, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	70.7%	78.6%	62.5%	86.9%
Male	70.5%	79.8%	60.1%	83.1%
Age				
16-24	60.9%	72.2%	50.1%	79.9%
25-34	77.4%	83.2%	67.9%	86.4%
35-44	79.3%	87.0%	71.8%	87.8%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	77.2%	83.7%	69.4%	86.6%
Medium	73.7%	83.8%	61.3%	87.6%
Low	65.2%	74.1%	56.8%	80.9%
N/A**	55.7%	67.8%	45.6%	76.9%
Household location				
Urban	73.5%	81.6%	64.1%	86.2%
Suburban	65.2%	75.0%	57.9%	83.0%
Rural	64.7%	75.4%	51.3%	78.3%
Total	70.5%	79.4%	60.9%	84.3%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20734

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TV Viewers in India, by Method, H1 2020

% of internet users

Broadcast live on TV channel

91.7%

TV channel's catch-up/on-demand service

78.4%

SVOD*

76.8%

Recorded from TV

69.8%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20728

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Video-on-Demand (VOD) Viewers in India, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	95.5%	95.9%
Male	94.0%	93.3%
Age		
16-24	96.3%	93.7%
25-34	95.3%	96.1%
35-44	93.1%	94.9%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	96.4%	96.7%
Medium	94.6%	94.7%
Low	94.0%	92.7%
N/A**	89.9%	87.9%
Household location		
Urban	95.2%	94.8%
Suburban	94.2%	93.7%
Rural	91.1%	91.5%
Total	94.4%	94.1%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20732

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Social Media Users in India, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	84.6%	87.2%
Male	87.0%	88.4%
Age		
16-24	84.6%	85.6%
25-34	88.5%	89.8%
35-44	89.2%	90.8%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	85.5%	86.7%
Medium	89.2%	91.0%
Low	85.2%	87.6%
N/A**	81.1%	78.2%
Household location		
Urban	85.9%	87.6%
Suburban	89.1%	89.7%
Rural	84.1%	88.3%
Total	86.2%	88.1%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Hike, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20731

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Digital Audio Listeners in India, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	85.7%	89.9%
Male	86.4%	88.7%
Age		
16-24	89.2%	90.1%
25-34	88.3%	91.2%
35-44	80.4%	87.8%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	89.5%	93.4%
Medium	85.5%	88.6%
Low	86.2%	87.6%
N/A**	79.9%	79.6%
Household location		
Urban	87.2%	90.1%
Suburban	85.8%	88.9%
Rural	81.6%	84.9%
Total	86.2%	89.1%

Note: services include Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20736

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Voice Search Users in India, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	55.7%	63.0%
Male	54.3%	57.8%
Age		
16-24	57.2%	58.5%
25-34	57.2%	63.3%
35-44	53.0%	59.1%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	60.4%	68.6%
Medium	57.8%	58.7%
Low	49.0%	53.9%
N/A**	43.0%	40.9%
Household location		
Urban	57.4%	62.3%
Suburban	49.6%	53.8%
Rural	47.5%	50.9%
Total	54.7%	59.5%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20733

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KEY FEATURES**Social media engages more internet users in Indonesia than broadcast TV does.**

- As in 2019, over 93% of internet users ages 16 to 64 polled in Indonesia visited social networks in the prior month, according to GlobalWebIndex. The average time spent with social media was 3 hours, 19 minutes (3:19) per day. These figures were among the highest GlobalWebIndex recorded globally. But several factors should be kept in mind here. First, survey respondents were overwhelmingly young, and most were city dwellers. Also, YouTube was included in the social network category, meaning that internet users visiting the video platform were counted as social media users.
- More than 87% of internet users were video-on-demand (VOD) viewers, spending just over 1 hour per day with online TV and video content. Additionally, a notable 91.8% of respondents streamed music, podcasts, and other digital audio; these activities claimed an average 1:35 daily.
- Live broadcast TV remains hugely popular. Fully 88.8% of internet users watched broadcast TV, spending 1:55 per day, on average—almost double the 1:05 spent with online TV and video streaming.
- Many internet users were already using TV broadcasters' catch-up or on-demand offerings in 2019. Though penetration fell by a few percentage points this year, it remained robust at 58.4%. The share recording TV shows to view later also dipped slightly, to 46.8%.
- Over 61% of respondents watched TV or film content via subscription VOD (SVOD) services such as Netflix or CatchPlay—a smaller share than last year. Indonesia was one of the few countries where penetration of SVOD was lower in H1 2020 than a year prior.

- Nonetheless, smart TV ownership was up, reaching 25.0% of internet users this year. That said, adults 35 and older were more likely to own a smart TV. A clear correlation with affluence persisted as well. Penetration among individuals in high-income households was 41.7%, almost three times the 14.4% recorded in low-income households.

As in many other countries, traditional media is losing audiences.

- Internet users' engagement with broadcast TV and radio, print newspapers, and print magazines declined in Indonesia between 2019 and 2020, GlobalWebIndex reported. Newspapers and magazines were hit especially hard, as penetration dropped below 50%. Radio fared better, with 53.1% of those polled tuning in during the previous month. Several key constituencies have remained loyal to broadcast radio and print media; penetration was substantially above average among respondents ages 25 and older and those in higher-income households

PC ownership rose in 2020; smartphones were already ubiquitous.

- Smartphones are effectively universal in Indonesia. As of H1 2020, 98.8% of internet users polled owned one. Almost three-quarters (74.2%) owned a desktop or laptop; only 21.2% owned a tablet. Compared with 2019, PC penetration was up by 6.7 percentage points, while tablet ownership declined by 4.3 percentage points.
- Average time spent per day with smartphones and other mobile devices reached 4:58 this year. Yet desktops, laptops, and tablets also claimed a hefty 3:51. Both figures increased since H1 2019.
- With respect to newer digital devices, the survey found further evidence of a trend observed in 2019: Many gadgets aren't a priority for local web users. Smartwatches are the one exception, and penetration climbed from 9.7% in H1 2019 to 11.6% earlier this year (21.8% among respondents in affluent households). But ownership of TV streaming sticks, smart home products, and smart wristbands remained low in H1 2020, at 5.3%, 5.1%, and 4.5%, respectively. In some of these cases, shares actually fell during the year. Even internet users in higher-income households showed little interest in these devices.

- Voice assistants are a different matter. More than half (54.2%) of all internet users polled used a smartphone or smart speaker to activate a digital voice assistant such as Siri or Cortana in the month prior to polling. Usage reached 61.6% among affluents.

Device Ownership in Indonesia, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	99.3%	98.8%
Desktop/laptop	67.5%	74.2%
Smart TV	21.6%	25.0%
Tablet	25.5%	21.2%
Game console	16.2%	16.8%
Feature phone	19.1%	16.3%
Smartwatch	9.7%	11.6%
TV streaming stick/device	6.6%	5.3%
Smart home device	6.2%	5.1%
VR headset/device	4.7%	4.6%
Smart wristband	3.9%	4.5%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20555

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Smartphone and Tablet Owners in Indonesia, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	99.6%	99.3%	30.0%	24.7%
Male	98.9%	98.3%	21.4%	18.0%
Age				
16-24	99.5%	98.7%	15.4%	13.1%
25-34	99.7%	99.1%	31.8%	24.7%
35-44	99.1%	99.0%	31.9%	27.2%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	99.9%	99.2%	46.3%	39.7%
Medium	99.4%	99.2%	24.9%	17.7%
Low	98.7%	98.3%	15.9%	11.4%
N/A**	99.3%	97.5%	9.6%	7.1%
Household location				
Urban	99.6%	99.1%	31.7%	26.6%
Suburban	98.3%	98.5%	18.9%	16.7%
Rural*	-	-	-	-
Total	99.3%	98.8%	25.5%	21.2%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20740

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Smart TV Owners in Indonesia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	23.0%	27.5%
Male	20.2%	22.6%
Age		
16-24	15.6%	17.5%
25-34	24.4%	27.5%
35-44	27.3%	31.0%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	37.9%	41.7%
Medium	22.5%	23.4%
Low	13.0%	14.4%
N/A**	9.3%	12.5%
Household location		
Urban	26.7%	30.7%
Suburban	16.4%	20.8%
Rural*	-	-
Total	21.6%	25.0%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20741

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Average Time Spent with Media in Indonesia, H1 2019 & H1 2020

hrs:mins per day among internet users

Mobile



Desktop/laptop/tablet



Social networking



Broadcast TV



Music streaming



Gaming



Online press



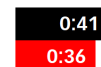
Online TV/streaming



Broadcast radio



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20738

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Traditional Media Users in Indonesia, Q1 2019 & Q1 2020 % of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20746

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Traditional Media Users in Indonesia, Q1 2020 % of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	44.2%	46.3%	55.9%	91.5%
Male	44.7%	51.5%	50.6%	89.9%
Age				
16-24	30.1%	35.1%	39.5%	82.9%
25-34	53.5%	56.9%	58.3%	94.3%
35-44	51.2%	57.0%	64.9%	95.9%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	58.7%	62.1%	67.0%	95.1%
Medium	43.4%	50.3%	52.2%	92.7%
Low	36.6%	39.1%	42.4%	86.0%
N/A**	11.2%	17.1%	31.3%	76.8%
Household location				
Urban	51.4%	55.6%	58.0%	91.8%
Suburban	37.4%	42.5%	48.8%	91.4%
Rural*	-	-	-	-
Total	44.4%	49.0%	53.1%	90.7%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20745

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TV Viewers in Indonesia, by Method, H1 2020 % of internet users

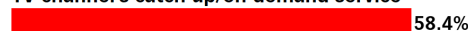
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20739

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Video-on-Demand (VOD) Viewers in Indonesia, H1 2019 & H1 2020 % of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	89.4%	88.2%
Male	88.0%	86.4%
Age		
16-24	88.2%	85.3%
25-34	92.9%	90.6%
35-44	83.3%	88.6%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	92.5%	91.2%
Medium	90.3%	86.8%
Low	86.7%	87.2%
N/A**	69.8%	73.7%
Household location		
Urban	91.3%	89.4%
Suburban	83.2%	85.9%
Rural*	-	-
Total	88.7%	87.2%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20743

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Social Media Users in Indonesia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	94.7%	93.4%
Male	93.8%	93.1%
Age		
16-24	94.3%	94.5%
25-34	95.4%	92.5%
35-44	93.3%	93.5%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	93.5%	94.1%
Medium	94.9%	93.2%
Low	94.2%	93.3%
N/A**	94.6%	90.6%
Household location		
Urban	94.3%	93.7%
Suburban	94.6%	93.2%
Rural*	-	-
Total	94.2%	93.3%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Path, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20742

www.eMarketer.com

Digital Audio Listeners in Indonesia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	92.1%	92.8%
Male	90.5%	90.8%
Age		
16-24	92.7%	93.6%
25-34	93.9%	93.8%
35-44	87.9%	89.9%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	93.7%	92.8%
Medium	90.7%	92.6%
Low	90.4%	91.8%
N/A**	84.8%	84.0%
Household location		
Urban	92.8%	92.9%
Suburban	88.9%	90.9%
Rural*	-	-
Total	91.3%	91.8%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20747

www.eMarketer.com

Voice Search Users in Indonesia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	54.1%	54.2%
Male	56.7%	54.2%
Age		
16-24	58.5%	57.3%
25-34	59.5%	56.7%
35-44	52.3%	52.1%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	57.0%	61.6%
Medium	53.5%	50.4%
Low	58.4%	53.2%
N/A**	39.9%	45.9%
Household location		
Urban	57.8%	58.4%
Suburban	51.1%	48.9%
Rural*	-	-
Total	55.4%	54.2%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20744

www.eMarketer.com

KEY FEATURES

In most respects, Ireland's media profile changed little from last year.

- In H1 2019, 95.9% of internet users in Ireland ages 16 to 64 owned a smartphone, according to GlobalWebIndex, while 81.4% owned a desktop or laptop. Those shares barely shifted in H1 2020, reaching 96.4% and 81.0%, respectively. Tablets also saw a marginal decline from 53.4% to 51.6%.
- Tablet ownership still correlated with higher income and rising age; however, among PC owners, those connections diminished. In fact, the greatest penetration of PCs this year was among respondents ages 16 to 24, at 85.1%. Predictably, smartphone ownership was almost uniformly high across all demographics.
- Larger screens still claim more media time than mobile phones. In H1 2020, respondents spent 3 hours, 12 minutes (3:12) each day on PCs and tablets, compared with 2:50 on mobile.
- Overall, penetration of print media was also broadly similar to 2019. Some 58.8% of respondents polled in H1 2020 read a print newspaper in the past month. That included more than two-thirds of those ages 45 to 64. A broadly similar age-related pattern emerged among print magazine readers. But unlike newspapers, magazines appeared to have lost reach, with readership dropping below 50%.
- Broadcast radio consumption rose by almost 3 percentage points in H1 2020. Nearly 82% of internet users listened to live radio programs during the prior month, spending an average 1:12 per day. As in 2019, penetration was above average among internet users in affluent and rural households and highest of all (over 91%) among 45- to 64-year-olds.
- By contrast, teens and young adults remain the driving force behind digital audio takeup. Just under 70% of respondents had streamed music, podcasts, or other digital audio content in the month prior to polling. But penetration among 16- to 24-year-olds (91.9%) was double that of the oldest age bracket (46.0%).

Demographic divides persist among live TV and video viewers, too.

- Only 80.3% of Ireland's internet users ages 16 to 24 watched traditional TV in the month prior to polling, compared with 96.7% of those ages 55 to 64. The share watching broadcasters' catch-up services rose several percentage points this year to 66.2% overall, while the share viewing TV programs recorded earlier shrank marginally to 61.8%.
- Video streaming was also more popular among younger individuals. In addition, nine in 10 affluents streamed video content of some kind in the prior month. Such discrepancies were even more pronounced when it came to subscription video-on-demand (SVOD). Across Ireland, penetration of services like Netflix and Amazon Prime Video rose almost 7 percentage points year over year (YoY) to 79.2%. But usage was significantly lower among older respondents, ranging from more than 88% among internet users ages 16 to 34, to just 55.2% among those 55 to 64.

Smartwatches, smart wristbands, and smart home devices are gaining traction, though penetration remains modest.

- Smart wristbands posted one of the largest increases in device penetration, per GlobalWebIndex. Some 16.5% of respondents owned a smart wristband in H1 2020, compared with 11.9% in H1 2019. Smartwatch ownership also jumped to 13.6%. Even these significant percentage increases don't represent hefty market shares, though.
- Smart home products—including household energy monitors and remote home security systems—are following a similar trajectory, with ownership rising from 11.6% last year to 15.0% in H1 2020. In high-income households, nearly 20% of internet users owned a smart home product.
- After a major increase between 2018 and 2019, the share of smart TV owners hardly rose this year (46.4%). Distribution across demographic groups was somewhat more equitable this year, but penetration remained highest in more affluent households and in the 35-to-54 age bracket.

- A footnote on game consoles: These may be falling out of favor, except among serious devotees. While 31.9% of internet users polled had a dedicated gaming device in H1 2020, that share was down from 37.6% a year prior. Perhaps predictably, penetration remained most robust among males (37.2%) and respondents ages 16 to 24 (40.8%).

Device Ownership in Ireland, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	95.9%	96.4%
Desktop/laptop	81.4%	81.0%
Tablet	53.4%	51.6%
Smart TV	46.3%	46.4%
Game console	37.6%	31.9%
TV streaming stick/device	26.2%	24.4%
Smart wristband	11.9%	16.5%
Smart home device	11.6%	15.0%
Smartwatch	10.5%	13.6%
Feature phone	6.6%	4.5%
VR headset/device	5.0%	3.9%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20556

www.eMarketer.com

Smartphone and Tablet Owners in Ireland, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.9%	97.3%	55.4%	53.8%
Male	94.9%	95.4%	51.4%	49.3%
Age				
16-24	96.7%	97.6%	44.8%	43.6%
25-34	97.3%	95.0%	48.6%	45.7%
35-44	97.9%	97.3%	59.6%	56.7%
45-54	94.5%	97.0%	58.9%	55.8%
55-64	90.8%	94.3%	54.0%	56.7%
Annual household income group				
High	97.7%	95.9%	65.1%	57.6%
Medium	95.4%	97.1%	53.4%	52.1%
Low	95.0%	95.6%	41.1%	44.2%
N/A*	95.2%	97.0%	52.2%	48.5%
Household location				
Urban	95.8%	95.1%	49.5%	48.3%
Suburban	97.0%	96.8%	54.4%	54.3%
Rural	95.0%	97.3%	56.9%	52.7%
Total	95.9%	96.4%	53.4%	51.6%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20751

www.eMarketer.com

Smart TV Owners in Ireland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	46.2%	45.9%
Male	46.5%	47.0%
Age		
16-24	42.0%	39.7%
25-34	42.3%	45.0%
35-44	49.7%	50.3%
45-54	51.5%	51.4%
55-64	45.4%	43.3%
Annual household income group		
High	55.7%	53.8%
Medium	48.5%	45.0%
Low	37.4%	40.5%
N/A*	38.9%	42.1%
Household location		
Urban	44.8%	46.1%
Suburban	49.3%	48.2%
Rural	45.0%	44.7%
Total	46.3%	46.4%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20752

www.eMarketer.com

Average Time Spent with Media in Ireland, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



Broadcast radio



Music streaming



Online TV/streaming



Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20749

www.eMarketer.com

Traditional Media Users in Ireland, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20757

www.eMarketer.com

Traditional Media Users in Ireland, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	46.6%	53.5%	83.8%	91.0%
Male	51.7%	64.4%	79.6%	85.7%
Age				
16-24	34.3%	45.6%	67.8%	80.3%
25-34	45.2%	51.3%	75.3%	83.0%
35-44	47.2%	59.9%	81.8%	90.4%
45-54	63.4%	67.2%	94.9%	93.9%
55-64	59.0%	75.1%	92.6%	96.7%
Annual household income group				
High	53.0%	60.5%	87.2%	90.7%
Medium	50.7%	61.3%	81.6%	86.6%
Low	47.5%	58.5%	72.5%	88.4%
N/A*	38.2%	49.0%	83.1%	86.7%
Household location				
Urban	52.4%	63.6%	79.4%	85.8%
Suburban	44.5%	52.6%	78.7%	86.2%
Rural	51.1%	60.9%	89.3%	95.2%
Total	49.1%	58.8%	81.8%	88.4%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20756

www.eMarketer.com

TV Viewers in Ireland, by Method, H1 2020

% of internet users

Broadcast live on TV channel

83.6%

SVOD*

79.2%

TV channel's catch-up/on-demand service

66.2%

Recorded from TV

61.8%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20750

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Ireland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	85.7%	86.6%
Male	82.3%	86.4%
Age		
16-24	90.8%	93.7%
25-34	88.5%	90.9%
35-44	87.9%	89.5%
45-54	80.1%	81.2%
55-64	65.2%	71.4%
Annual household income group		
High	87.2%	90.3%
Medium	83.9%	85.2%
Low	83.7%	85.4%
N/A*	79.3%	82.1%
Household location		
Urban	83.0%	88.1%
Suburban	87.8%	88.5%
Rural	81.1%	82.0%
Total	84.1%	86.5%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20754

www.eMarketer.com

Social Media Users in Ireland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	89.8%	89.1%
Male	88.1%	87.1%
Age		
16-24	90.3%	92.1%
25-34	89.6%	89.4%
35-44	88.4%	87.1%
45-54	90.0%	87.6%
55-64	85.4%	83.6%
Annual household income group		
High	89.4%	89.6%
Medium	89.8%	89.2%
Low	87.2%	86.6%
N/A*	89.1%	84.5%
Household location		
Urban	88.7%	87.5%
Suburban	90.1%	88.6%
Rural	87.9%	88.5%
Total	88.9%	88.2%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20753

www.eMarketer.com



Digital Audio Listeners in Ireland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	61.6%	70.2%
Male	64.6%	69.3%
Age		
16-24	85.0%	91.9%
25-34	71.2%	77.9%
35-44	57.5%	73.1%
45-54	58.0%	51.6%
55-64	36.5%	46.0%
Annual household income group		
High	72.2%	75.4%
Medium	58.4%	68.1%
Low	60.7%	63.5%
N/A*	60.5%	69.8%
Household location		
Urban	62.8%	72.7%
Suburban	66.7%	71.3%
Rural	59.2%	64.3%
Total	63.1%	69.8%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20758

www.eMarketer.com

Voice Search Users in Ireland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	25.2%	24.7%
Male	35.1%	33.0%
Age		
16-24	39.7%	42.3%
25-34	37.6%	33.1%
35-44	31.4%	29.2%
45-54	21.5%	21.4%
55-64	13.9%	14.0%
Annual household income group		
High	32.7%	32.9%
Medium	27.6%	29.2%
Low	33.5%	26.4%
N/A*	24.1%	21.3%
Household location		
Urban	34.4%	34.0%
Suburban	28.7%	27.9%
Rural	26.2%	23.5%
Total	30.0%	28.8%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20755

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KEY FEATURES

Widely known as the home of several successful tech startups, Israel posts predictably high engagement with smartphones and PCs.

- Fully 96.8% of internet users ages 16 to 64 in Israel owned a smartphone in H1 2020, according to GlobalWebIndex. More unusually, PC penetration was above 80%, and reached 89.4% among affluent respondents. Tablet penetration was comparatively low, however, at 34.2% overall.
- Some 44.0% of respondents owned a smart TV, with penetration passing 51% among those ages 45 to 64. Affluents recorded the highest ownership at 57.3%.
- Several advanced devices haven't taken off in Israel, though. For example, a mere 6.3% had a smart wristband, and 10.9% owned a smartwatch. Just 9.5% owned a smart home product, such as a system enabling users to manage their home energy consumption or security via a mobile app. Smartphones and smart home devices were more common among 25- to 44-year-olds and those in affluent households.

Internet users spent much more time with traditional TV and radio than their digital counterparts.

- Eight in 10 internet users ages 16 to 64 in Israel had watched live TV in the month prior to polling in H1 2020. Moreover, the time they spent with broadcast TV reached an average of 1 hour, 56 minutes (1:56) per day. Broadcast TV reached a significantly larger audience than time-shifted options, such as TV channels' catch-up or on-demand services (cited by 64.5%) or recording TV shows to watch later (54.5%). As expected, younger web users were more likely to watch programs via catch-up, while older respondents gravitated more toward live TV.

- Subscription video-on-demand (SVOD) services like Netflix are gradually increasing their market presence. In H1 2020, 61.2% of internet users polled had used SVOD to watch TV programs, films, or other video content in the previous month. That was roughly equivalent to the shares in France and Romania (61.6% and 60.5%, respectively) but well below the reach of SVOD in many other countries surveyed, including Canada (76.2%) and Ireland (79.2%).
- Growth in time-shifted and digital viewing did help to boost overall adoption of video-on-demand (VOD) in Israel to 79.3% of internet users. Respondents spent a daily average of 50 minutes with online TV/streaming options.
- As with SVOD, consumption of digital audio remains lower than in several other parts of the world. Just six in 10 respondents had listened to digital audio content (including music, podcasts, or audiobooks) in the month prior to polling. Music streaming accounted for 57 minutes per day on average.
- By contrast, nearly 78% had tuned in to broadcast radio in the previous month. The 1:03 spent with live radio per day also surpassed the time spent with digital audio.
- Print newspapers are still an important medium in Israel and registered penetration of more than 65% in H1 2020. Fewer than 45% of respondents had read a print magazine, though. Readership of both formats was higher among men and those in the 55-to-64 age bracket. Time spent with print press (35 minutes daily, on average) remained higher than the 24 minutes devoted to online press.
- Social networks engaged more internet users in Israel than any traditional media format except TV. (GlobalWebIndex includes YouTube in its social category, which increases the metrics for penetration and time spent.) Some 82.5% of respondents had accessed social platforms or apps in the prior month. Penetration was broadly similar across all demographics, if a few percentage points greater among 16- to 24-year-olds and people living in more affluent households. Internet users in rural areas were also more likely than city dwellers to have used social media.

Device Ownership in Israel, H1 2020

% of internet users

Smartphone	96.8%
Desktop/laptop	80.3%
Smart TV	44.0%
Tablet	34.2%
Game console	19.2%
Smartwatch	10.9%
Feature phone	10.1%
Smart home device	9.5%
TV streaming stick/device	6.5%
Smart wristband	6.3%
VR headset/device	3.6%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20557

www.eMarketer.com

Smartphone and Tablet Owners in Israel, H1 2020

% of internet users, by demographic

	Smartphone	Tablet
Gender		
Female	96.4%	34.1%
Male	97.1%	34.3%
Age		
16-24	93.5%	27.1%
25-34	97.3%	33.2%
35-44	97.7%	41.2%
45-54	98.2%	38.0%
55-64	98.3%	32.6%
Annual household income group		
High	99.1%	43.2%
Medium	96.3%	37.0%
Low	95.2%	28.1%
N/A*	95.8%	28.0%
Household location		
Urban	96.3%	34.6%
Suburban**	-	-
Rural	99.6%	32.7%
Total	96.8%	34.2%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2020, August 2020

T20762

www.eMarketer.com

Smart TV Owners in Israel, H1 2020

% of internet users, by demographic

Gender	
Female	43.0%
Male	45.0%
Age	
16-24	35.5%
25-34	40.3%
35-44	46.1%
45-54	51.9%
55-64	52.8%
Annual household income group	
High	57.3%
Medium	47.1%
Low	33.8%
N/A*	38.1%
Household location	
Urban	43.7%
Rural	48.4%
Total	44.0%

Note: suburban household location omitted due to small sample size; respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2020, August 2020

T20763

www.eMarketer.com

Average Time Spent with Media in Israel, H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet	3:42
Mobile	3:28
Social networking	2:05
Broadcast TV	1:56
Broadcast radio	1:03
Music streaming	0:57
Online TV/streaming	0:50
Print	0:35
Online press	0:24
Gaming	0:22

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2020, August 2020

T20760

www.eMarketer.com

Traditional Media Users in Israel, Q1 2020

% of internet users

TV viewers	87.3%
Radio listeners	77.8%
Newspaper readers	65.4%
Magazine readers	44.4%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20768

www.eMarketer.com

Traditional Media Users in Israel, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	43.3%	61.9%	76.4%	85.4%
Male	45.5%	68.8%	79.1%	89.1%
Age				
16-24	49.3%	60.3%	61.1%	84.1%
25-34	34.6%	57.2%	73.9%	82.8%
35-44	38.9%	66.5%	84.4%	88.0%
45-54	48.6%	71.0%	84.5%	89.2%
55-64	56.9%	80.3%	95.3%	97.2%
Annual household income group				
High	45.9%	68.4%	92.8%	94.4%
Medium	44.6%	69.7%	84.3%	85.6%
Low	45.4%	62.6%	62.1%	86.8%
N/A*	40.0%	58.7%	69.9%	79.0%
Household location				
Urban	42.9%	64.3%	77.1%	86.6%
Suburban**	-	-	-	-
Rural	44.2%	66.6%	79.2%	94.4%
Total	44.4%	65.4%	77.8%	87.3%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20767

www.eMarketer.com

TV Viewers in Israel, by Method, H1 2020

% of internet users

Broadcast live on TV channel

80.0%

TV channel's catch-up/on-demand service

64.5%

SVOD*

61.2%

Recorded from TV

54.5%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2020, August 2020

T20761

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Israel, H1 2020

% of internet users, by demographic

Gender

Female 80.9%

Male 77.7%

Age

16-24 80.9%

25-34 81.1%

35-44 81.1%

45-54 79.6%

55-64 70.4%

Annual household income group

High 83.5%

Medium 79.4%

Low 77.8%

N/A* 73.8%

Household location

Urban 80.9%

Rural 74.9%

Total 79.3%

Note: suburban household location omitted due to small sample size; used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way.";

*don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2020, August 2020

T20765

www.eMarketer.com

Social Media Users in Israel, H1 2020

% of internet users, by demographic

Gender

Female 80.8%

Male 84.3%

Age

16-24 85.7%

25-34 81.6%

35-44 84.7%

45-54 80.4%

55-64 77.7%

Annual household income group

High 86.4%

Medium 81.7%

Low 80.9%

N/A* 80.2%

Household location

Urban 81.8%

Rural 85.3%

Total 82.5%

Note: suburban household location omitted due to small sample size; actively engaged with or contributed to at least one service in the past month via any device; respondents were asked, "Which of the following services have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2020, August 2020

T20764

www.eMarketer.com

Digital Audio Listeners in Israel, H1 2020

% of internet users, by demographic

Gender

Female	56.6%
Male	63.5%

Age

16-24	74.5%
25-34	64.5%
35-44	56.3%
45-54	52.8%
55-64	41.3%

Annual household income group

High	59.7%
Medium	58.1%
Low	58.4%
N/A*	59.5%

Household location

Urban	61.3%
Rural	55.2%
Total	60.0%

Note: suburban household location omitted due to small sample size; services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2020, August 2020

T20769

www.eMarketer.com

Voice Assistant Users in Israel, H1 2020

% of internet users, by demographic

Gender

Female	15.4%
Male	27.5%

Age

16-24	33.2%
25-34	23.9%
35-44	24.0%
45-54	9.7%
55-64	9.4%

Annual household income group

High	22.4%
Medium	19.1%
Low	29.9%
N/A*	18.0%

Household location

Urban	22.9%
Rural	17.4%
Total	21.6%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g. Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019, 8/1/2020

T20766

www.eMarketer.com

ITALY

KEY FEATURES

Time spent with mobile continues to exceed time spent watching live TV in Italy, while smartphones become ubiquitous.

- Some 97.3% of internet users in Italy ages 16 to 64 owned a smartphone in H1 2020. Interestingly, smartphone ownership surpassed broadcast TV viewing, which stood at 96.4% of internet users, according to GlobalWebIndex polling. This is the first time that any device or media behavior has posted greater reach than broadcast TV in the country.
- Mobile time already exceeded time spent with TV and continued to do so in H1 2020. Internet users spent a daily average of 2 hours, 22 minutes (2:22) with broadcast TV, a year-over-year (YoY) increase. But average daily mobile time had also jumped to 2:50.
- The significant gaps between smartphone, tablet, and PC ownership persisted this year. Tablet ownership climbed from 53.9% to 54.4%, but the share owning a desktop or laptop slipped from 76.1% to 75.7%. PCs and tablets still accounted for a larger slice of daily media time, however, at 3:22 on average.

Live TV also competes with digital options on screens of all sizes.

- More than two-thirds of internet users in Italy had taken advantage of TV broadcasters' catch-up or on-demand services to watch programs, and 52.4% said they had recorded TV shows to watch later. Younger and more affluent internet users were more likely to choose these options.
- Video streaming is broadly popular, too, with penetration ranging from 95.3% among internet users ages 16 to 24, to 75.4% among those ages 55 to 64. Usage had risen in all demographics YoY, pushing the overall average to 85.2%.



- Meanwhile, paid-for digital video consumption rose considerably. In H1 2020, 68.7% of respondents accessed a subscription video-on-demand (SVOD) service such as Netflix in the preceding month—a gain of more than 9 percentage points. As in prior years, take-up was stronger among 16- to 34-year-olds and affluents.
- Compared with video streaming, fewer internet users in Italy (83.6%) engaged with social media. On the other hand, the time spent daily with social platforms averaged 1:50—almost an hour more than time devoted to video streaming, at 58 minutes. This may partly be because GlobalWebIndex includes YouTube in the category of social media.

While digital behaviors are on the rise, take-up of many digital devices is lackluster, not least because financial and other pressures weigh on many consumers.

- Italy's economy remains in deep trouble. The country was one of the first in Europe to suffer the shock of the coronavirus, and the pandemic only added to the financial gloom, especially in the retail and hospitality industries that contribute substantially to Italy's economy.
- The popularity of both TV and digital video has boosted the purchase of smart TVs, but ownership rose by less than 3 percentage points between 2019 and 2020, to 46.9%. Internet users in better-off households were more likely to own one (53.4%).
- In H1 2019, 10.2% of internet users owned a smartwatch, and 5.3% owned a smart wristband. A year later, those shares had climbed to just 11.9% and 8.8%, respectively.
- Similarly, smart home products, such as devices that allow homeowners to control their heating or appliances remotely, seem to have largely lost momentum. As of H1 2020, 11.5% of internet users owned a smart home device. Respondents in affluent households registered penetration of 14.7%, though, and 13.2% of those 25 to 34 also owned one.

Device Ownership in Italy, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	96.5%	97.3%
Desktop/laptop	76.1%	75.7%
Tablet	53.9%	54.4%
Smart TV	44.0%	46.9%
Game console	36.6%	35.9%
TV streaming stick/device	13.9%	15.1%
Smartwatch	10.2%	11.9%
Smart home device	7.3%	11.5%
Smart wristband	5.3%	8.8%
VR headset/device	3.6%	3.0%
Feature phone	1.9%	1.7%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20558

www.eMarketer.com

Smartphone and Tablet Owners in Italy, H1 2019 & H1 2020 % of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.9%	98.1%	53.6%	53.1%
Male	96.2%	96.6%	54.3%	55.7%
Age				
16-24	98.5%	98.2%	51.4%	48.9%
25-34	96.9%	97.6%	49.5%	50.5%
35-44	96.8%	97.4%	55.5%	56.2%
45-54	96.5%	97.0%	58.5%	58.9%
55-64	93.8%	96.7%	52.4%	54.8%
Annual household income group				
High	97.4%	97.9%	63.1%	65.0%
Medium	96.8%	97.7%	55.3%	53.7%
Low	95.5%	96.2%	45.1%	44.8%
N/A*	96.4%	97.6%	49.6%	49.6%
Household location				
Urban	96.8%	97.4%	55.4%	56.6%
Suburban	96.3%	97.1%	52.3%	52.6%
Rural	96.0%	97.4%	51.4%	49.8%
Total	96.5%	97.3%	53.9%	54.4%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20773

www.eMarketer.com

Smart TV Owners in Italy, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	41.5%	45.1%
Male	46.4%	48.5%
Age		
16-24	40.2%	45.8%
25-34	46.5%	47.2%
35-44	45.0%	47.3%
45-54	44.4%	48.1%
55-64	43.2%	45.3%
Annual household income group		
High	52.4%	53.4%
Medium	45.6%	49.3%
Low	37.4%	39.8%
N/A*	35.9%	40.7%
Household location		
Urban	45.1%	47.4%
Suburban	43.9%	47.7%
Rural	40.6%	43.8%
Total	44.0%	46.9%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20774

www.eMarketer.com

Average Time Spent with Media in Italy, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



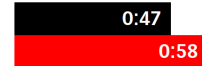
Music streaming



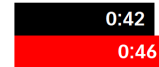
Broadcast radio



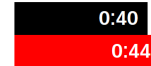
Online TV/streaming



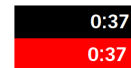
Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20771

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Traditional Media Users in Italy, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20779

www.eMarketer.com

Traditional Media Users in Italy, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	64.5%	62.6%	84.8%	95.7%
Male	65.0%	68.3%	82.7%	91.4%
Age				
16-24	52.5%	55.2%	68.6%	90.0%
25-34	57.7%	59.1%	78.8%	90.6%
35-44	66.3%	65.4%	87.1%	93.6%
45-54	70.8%	71.0%	89.6%	94.9%
55-64	72.9%	74.4%	89.9%	97.8%
Annual household income group				
High	70.7%	71.1%	88.1%	94.1%
Medium	66.7%	66.9%	84.3%	94.8%
Low	58.3%	59.4%	78.6%	90.6%
N/A*	59.0%	61.2%	81.6%	95.0%
Household location				
Urban	67.6%	68.3%	83.2%	93.1%
Suburban	60.7%	60.4%	83.3%	93.4%
Rural	61.3%	64.1%	86.2%	95.0%
Total	64.8%	65.6%	83.7%	93.5%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20778

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TV Viewers in Italy, by Method, H1 2020

% of internet users

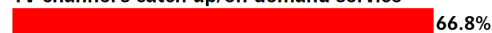
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20772

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Italy, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	80.2%	83.1%
Male	84.3%	87.1%
Age		
16-24	92.4%	95.3%
25-34	91.2%	91.6%
35-44	81.1%	85.4%
45-54	76.8%	80.5%
55-64	71.9%	75.4%
Annual household income group		
High	86.0%	89.1%
Medium	82.9%	85.3%
Low	80.0%	83.1%
N/A*	77.6%	79.8%
Household location		
Urban	84.3%	87.5%
Suburban	81.0%	83.4%
Rural	77.9%	80.3%
Total	82.3%	85.2%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20776

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Social Media Users in Italy, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	80.2%	83.2%
Male	80.2%	84.0%
Age		
16-24	82.6%	87.0%
25-34	80.7%	83.5%
35-44	79.6%	83.9%
45-54	78.9%	82.9%
55-64	80.0%	81.3%
Annual household income group		
High	82.1%	85.6%
Medium	80.8%	83.9%
Low	78.1%	82.4%
N/A*	79.2%	81.1%
Household location		
Urban	80.6%	84.0%
Suburban	79.5%	83.9%
Rural	79.9%	81.7%
Total	80.2%	83.6%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20775

www.eMarketer.com

Digital Audio Listeners in Italy, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	57.0%	61.4%
Male	63.6%	68.5%
Age		
16-24	86.3%	88.4%
25-34	71.7%	77.0%
35-44	59.5%	65.2%
45-54	49.4%	55.5%
55-64	38.0%	44.6%
Annual household income group		
High	63.6%	65.8%
Medium	58.6%	64.0%
Low	60.2%	66.3%
N/A*	56.3%	63.2%
Household location		
Urban	63.7%	67.4%
Suburban	58.2%	63.9%
Rural	52.3%	59.3%
Total	60.3%	65.1%

Note: services include Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20780

www.eMarketer.com

Voice Search Users in Italy, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	32.0%	31.7%
Male	39.6%	39.4%
Age		
16-24	49.3%	50.6%
25-34	43.7%	40.6%
35-44	37.1%	36.8%
45-54	30.4%	30.8%
55-64	20.4%	23.6%
Annual household income group		
High	38.3%	38.0%
Medium	36.6%	34.3%
Low	35.0%	36.9%
N/A*	30.7%	31.1%
Household location		
Urban	38.5%	37.2%
Suburban	34.1%	35.7%
Rural	29.7%	31.0%
Total	35.9%	35.8%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20777

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KEY FEATURES

By global standards, penetration of most digital devices and behaviors is low in Japan.

- Japan is a highly industrialized country with robust traditions of manufacturing, technological expertise, and innovation. Yet its consumers aren't in the forefront of many device adoption trends.
- For example, smartphone ownership has yet to pass 90% in Japan, but it did rise to 88.2% of internet users ages 16 to 64 in H1 2020, per GlobalWebIndex polling. One reason for this relatively low figure is that advanced feature phones were introduced to the Japanese market early and enjoyed substantial takeup.
- Desktop/laptop ownership declined between H1 2019 and H1 2020, from 75.6% to 74.3%, and is mostly concentrated among older individuals. Nearly 83% of respondents ages 55 to 64 owned a desktop/laptop in H1 2020, versus 65.9% of those in the 16-to-24 age group. The opposite was true for smartphone owners: More than 96% of the youngest group owned one, compared with 82.8% of 55- to 64-year-olds. Affluents were more likely to own smartphones and PCs.
- Ownership of tablets also remained high among respondents in the most affluent households (36.0%), but they have never really appealed to a significant share of internet users in Japan. Penetration across demographics was just 27.5% in H1 2020, a slight decline from last year.
- Smart TV ownership was also markedly low at 7.5%. Similarly, the share of internet users who owned a smart home product, such as a web-enabled energy monitoring system, slipped from 3.9% to 3.5%. Meanwhile, penetration of smartwatches and smart wristbands did rise marginally to 4.8% and 1.8%, respectively. Higher income correlated strongly with takeup of all these devices.

Digital entertainment is largely confined to younger age groups and the affluent.

- TV viewing remains the most widespread entertainment experience in Japan. Nearly 90% of internet users watched live TV in the month prior to polling in H1 2020, and more than two-thirds had seen TV shows recorded earlier. In both cases, penetration had hardly changed year over year (YoY). Barely 30% of respondents polled in H1 2020 had used a broadcaster's catch-up or on-demand service to watch TV programs in the prior month.
- Viewing of subscription video-on-demand (SVOD) services did register a major change, however; 31.3% of internet users watched SVOD services in H1 2020, an almost 6-percentage-point increase YoY. SVOD, like catch-up TV viewing, correlated directly with age and was far more common among younger people.
- Overall, 45.4% of respondents streamed video-on-demand (VOD) content of some kind in the prior month. Penetration reached 65.1% among 16- to 24-year-olds and 55.4% among high-income households. More than half of males were VOD viewers, compared with just under 40% of females. Consumption of digital audio content followed a very similar pattern: More than two-thirds of the youngest cohort and 46.5% of affluents had streamed music, podcasts, or other digital audio material in the month prior; males were more likely than females to do so.
- The prevalence of PCs among seniors is shaping daily time spent with various media. In H1 2020, internet users spent the most time with PCs and tablets, at an average of 2 hours, 38 minutes (2:38) per day. As last year, broadcast TV ranked second overall, claiming an average 2:12 daily. Mobile phones accounted for less time, at 1:38 per day. Most other activities took up less than 30 minutes. Social networking was the one exception, estimated at 47 minutes, as the pandemic likely increased the time spent keeping in touch with friends and family via social platforms. Also, YouTube viewers likely contributed to that higher level of engagement, as GlobalWebIndex includes the video platform in its social media category.

Device Ownership in Japan, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	86.2%	88.2%
Desktop/laptop	75.6%	74.3%
Game console	28.1%	30.9%
Tablet	28.1%	27.5%
Feature phone	10.4%	11.3%
Smart TV	9.1%	7.5%
TV streaming stick/device	7.4%	6.6%
Smartwatch	4.0%	4.8%
Smart home device	3.9%	3.5%
VR headset/device	2.0%	1.9%
Smart wristband	1.6%	1.8%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smartphone and Tablet Owners in Japan, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	87.2%	88.4%	25.0%	24.4%
Male	85.4%	88.0%	31.1%	30.5%
Age				
16-24	98.1%	96.2%	26.8%	27.2%
25-34	92.1%	90.8%	31.7%	28.3%
35-44	86.4%	87.9%	29.1%	26.5%
45-54	82.9%	85.8%	25.8%	29.3%
55-64	76.5%	82.8%	26.5%	26.2%
Annual household income group				
High	90.2%	92.0%	33.8%	36.0%
Medium	87.0%	89.8%	30.8%	28.6%
Low	81.0%	83.6%	24.0%	23.4%
N/A*	86.9%	87.3%	21.7%	21.2%
Household location				
Urban	88.4%	90.4%	29.7%	29.3%
Suburban	83.5%	84.3%	26.5%	27.6%
Rural	89.4%	92.7%	29.1%	23.5%
Total	86.2%	88.2%	28.1%	27.5%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smart TV Owners in Japan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	7.1%	5.8%
Male	11.0%	9.1%
Age		
16-24	9.7%	7.1%
25-34	10.7%	6.2%
35-44	8.3%	8.1%
45-54	8.9%	7.9%
55-64	8.4%	8.2%
Annual household income group		
High	14.3%	12.8%
Medium	8.5%	7.4%
Low	6.9%	6.1%
N/A*	5.4%	3.2%
Household location		
Urban	10.1%	8.3%
Suburban	9.6%	8.4%
Rural	4.6%	3.9%
Total	9.1%	7.5%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Average Time Spent with Media in Japan, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Broadcast TV



Mobile



Social networking



Broadcast radio



Gaming



Print



Music streaming



Online TV/streaming



Online press



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20782

www.eMarketer.com

Traditional Media Users in Japan, Q1 2019 & Q1 2020

% of internet users

TV viewers



Newspaper readers



Magazine readers



Radio listeners



■ Q1 2019 ■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20789

www.eMarketer.com

Traditional Media Users in Japan, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	46.7%	48.4%	38.8%	90.3%
Male	47.1%	56.3%	50.5%	87.8%
Age				
16-24	36.6%	42.0%	40.7%	83.7%
25-34	42.7%	42.9%	35.9%	83.3%
35-44	51.1%	51.6%	45.5%	91.4%
45-54	50.9%	57.5%	47.5%	92.7%
55-64	49.9%	65.3%	52.8%	92.0%
Annual household income group				
High	65.0%	72.3%	53.5%	91.3%
Medium	47.5%	49.9%	48.5%	91.7%
Low	37.1%	41.1%	38.5%	85.8%
N/A*	33.7%	45.1%	34.6%	85.9%
Household location				
Urban	53.5%	54.7%	43.9%	88.1%
Suburban	43.9%	51.8%	45.9%	89.0%
Rural	38.4%	46.3%	41.3%	93.5%
Total	46.9%	52.4%	44.8%	89.0%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20788

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TV Viewers in Japan, by Method, H1 2020

% of internet users

Broadcast live on TV channel

89.5%

Recorded from TV

67.2%

SVOD*

31.3%

TV channel's catch-up/on-demand service

30.9%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20790

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Japan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	39.5%	39.9%
Male	51.5%	50.6%
Age		
16-24	69.7%	65.1%
25-34	59.5%	53.6%
35-44	45.1%	43.9%
45-54	34.5%	35.7%
55-64	31.9%	35.5%
Annual household income group		
High	53.2%	55.4%
Medium	45.3%	49.0%
Low	43.2%	40.9%
N/A*	37.2%	31.6%
Household location		
Urban	50.9%	48.7%
Suburban	42.7%	43.8%
Rural	41.3%	41.0%
Total	45.6%	45.4%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20791

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Social Media Users in Japan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	77.1%	79.1%
Male	75.8%	79.2%
Age		
16-24	88.9%	91.2%
25-34	85.6%	83.9%
35-44	77.4%	78.7%
45-54	71.5%	76.6%
55-64	63.8%	69.0%
Annual household income group		
High	79.5%	81.8%
Medium	76.8%	81.5%
Low	74.8%	78.4%
N/A*	73.8%	73.7%
Household location		
Urban	78.0%	80.8%
Suburban	73.7%	76.7%
Rural	81.2%	81.4%
Total	76.4%	79.1%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Ameblo, Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20787

www.eMarketer.com



Digital Audio Listeners in Japan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	28.3%	33.8%
Male	39.0%	40.6%
Age		
16-24	49.3%	66.3%
25-34	48.2%	45.4%
35-44	32.6%	33.1%
45-54	24.5%	26.7%
55-64	22.7%	25.8%
Annual household income group		
High	42.2%	46.5%
Medium	32.8%	38.2%
Low	30.2%	34.2%
N/A*	26.8%	27.2%
Household location		
Urban	38.5%	43.0%
Suburban	31.5%	33.7%
Rural	27.1%	35.4%
Total	33.7%	37.3%

Note: services include Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20783

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Voice Search Users in Japan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	12.5%	13.3%
Male	20.6%	17.1%
Age		
16-24	28.6%	22.7%
25-34	20.4%	21.2%
35-44	16.4%	14.6%
45-54	11.7%	12.1%
55-64	12.1%	9.3%
Annual household income group		
High	21.7%	21.3%
Medium	15.9%	15.9%
Low	15.0%	12.9%
N/A*	12.6%	8.6%
Household location		
Urban	18.2%	18.0%
Suburban	16.0%	14.0%
Rural	14.9%	11.6%
Total	16.7%	15.2%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20792

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MALAYSIA

KEY FEATURES

Smartphones rule in Malaysia, and ownership of desktops and laptops also rose this year.

- Smartphone ownership in Malaysia remained very high in H1 2020, at 98.9% of internet users ages 16 to 64, according to GlobalWebIndex. However, this isn't surprising, given that the country's experience of the internet was mobile-first.
- A growing share of respondents (73.1%) also owned desktops and laptops. As in H1 2019, about one-third of respondents owned a tablet—signaling that penetration of that device may be reaching a plateau, but it was significantly greater among affluent respondents (46.1%).
- The proportion of internet users who still owned a feature phone dropped below 10% for the first time, but remained well above that threshold in several cohorts, including adults 25 to 34, those living in the least affluent homes, and those in rural areas.
- Time spent with smartphones and nonmobile devices mirrored those devices' high penetration rates. In H1 2020, mobile phones claimed an average of 4 hours, 31 minutes (4:31) per day, compared with 4:06 spent on PCs and tablets. Both figures were up year over year (YoY). Time spent with social networking—which totaled 3:00 per day—rose marginally and boosted mobile consumption overall in H1 2020.
- Smartwatches were already gaining fans in Malaysia last year; 12.6% of internet users owned one in H1 2019. That share rose to 15.7%. Here too, better-off, urban internet users and those in the 25-to-34 age bracket registered more substantial figures, at 21.1%, 18.1%, and 19.0%, respectively. Just 12.0% of respondents owned a smart wristband.



- Usage of voice search in Malaysia has barely risen since GlobalWebIndex first tracked its adoption in 2019, with 34.4% of internet users using a voice assistant like Siri in the prior month. That share rose to 46.6% among 16- to 24-year-olds and was also above average among males, urban dwellers, and those ages 25 to 34. In H1 2019, respondents at both ends of the household income scale were more likely to use voice command tools; in H1 2020, the survey found lower-income respondents were the leading users. It's likely that for many internet users in this demographic segment, voice search remains easier and more convenient than text-based search.

Most traditional media is losing audience share as digital alternatives make further strides.

- Print formats suffered a decline YoY, GlobalWebIndex and Publicis Media reported. While 67.4% of internet users polled last year had read a print newspaper in the prior month, in H1 2020 only 62.8% had done so. Penetration of print magazines dropped from 54.7% to 51.7%. In addition, the average daily time spent with print press fell further behind time devoted to online publications, at 34 minutes and 51 minutes, respectively.
- Live TV also saw some signs of waning appeal, as the share of respondents watching in the month prior fell from 83.0% to 79.9%. Adults ages 25 to 34 registered the highest penetration at 85.0%.
- Following a trend seen in many other countries, Malaysia's internet users seem to be turning away from some older methods of time-shifting TV programs. For example, the proportion watching prerecorded TV shows fell from 58.2% to 55.5%; the share using TV channels' catch-up or on-demand services slipped from 69.4% to 64.2%. And—as in other nations that GlobalWebIndex monitored—more were tuning in to subscription video-on-demand (SVOD) services like Netflix. In Malaysia, that audience grew from 53.1% to 56.9% of respondents in H1 2020. The share of smart TV owners also increased to 33.0%.
- In total, 76.5% of respondents had streamed video content in the month prior to polling, including paid and unpaid services. Video-on-demand (VOD) viewing was more common among internet users ages 34 and younger. It was also more widespread in lower-income households. Online TV and video streaming accounted for an estimated 1:13 per day, a marginal increase since H1 2019.

- Of course, YouTube accounts for a sizable share of video consumption. GlobalWebIndex includes YouTube in its list of social network destinations, which tends to increase the reach of social networking, as well as time spent with the medium. In Malaysia, 91.6% of internet users said they had visited social platforms in the month prior to polling—one of the highest values recorded for the metric this year.
- In contrast to print media and traditional TV, broadcast radio reached a slightly larger share of the online population in H1 2020 versus last year. Some 83.5% had listened to radio programming in the prior month, spending almost an hour each day. This might mean that more consumers tuned in to live radio as a useful source of up-to-date information during the pandemic. Penetration of digital audio lagged somewhat at 79.4% but was still high by global standards.

Device Ownership in Malaysia, H1 2019 & H1 2020
% of internet users

	H1 2019	H1 2020
Smartphone	99.1%	98.9%
Desktop/laptop	70.9%	73.1%
Tablet	32.1%	33.1%
Smart TV	29.7%	33.0%
Smartwatch	12.6%	15.7%
Game console	14.8%	15.5%
Smart wristband	9.1%	12.0%
Feature phone	11.6%	9.8%
TV streaming stick/device	9.1%	9.4%
Smart-home device	7.3%	7.6%
VR headset/device	3.1%	2.7%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20560

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Smartphone and Tablet Owners in Malaysia, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	99.1%	98.9%	33.3%	33.4%
Male	99.1%	99.0%	31.1%	32.9%
Age				
16-24	99.6%	99.1%	24.2%	26.0%
25-34	99.0%	99.0%	31.4%	34.1%
35-44	99.4%	98.7%	34.7%	36.8%
45-54	98.9%	98.8%	42.1%	36.3%
55-64*	-	-	-	-
Annual household income group				
High	99.4%	99.1%	45.7%	46.1%
Medium	98.8%	98.8%	30.2%	32.8%
Low	99.1%	98.8%	20.9%	20.5%
N/A**	99.4%	99.0%	20.1%	20.2%
Household location				
Urban	99.2%	99.1%	34.4%	37.3%
Suburban	98.8%	98.6%	32.5%	29.4%
Rural*	-	-	-	-
Total	99.1%	98.9%	32.1%	33.1%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20797

www.eMarketer.com

Smart TV Owners in Malaysia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	30.6%	33.7%
Male	28.9%	32.3%
Age		
16-24	22.5%	26.6%
25-34	29.7%	35.0%
35-44	35.1%	33.4%
45-54	37.2%	36.4%
55-64*	-	-
Annual household income group		
High	42.8%	44.2%
Medium	27.2%	34.0%
Low	19.0%	20.7%
N/A**	20.1%	20.6%
Household location		
Urban	33.6%	36.1%
Suburban	25.3%	30.7%
Rural*	-	-
Total	29.7%	33.0%

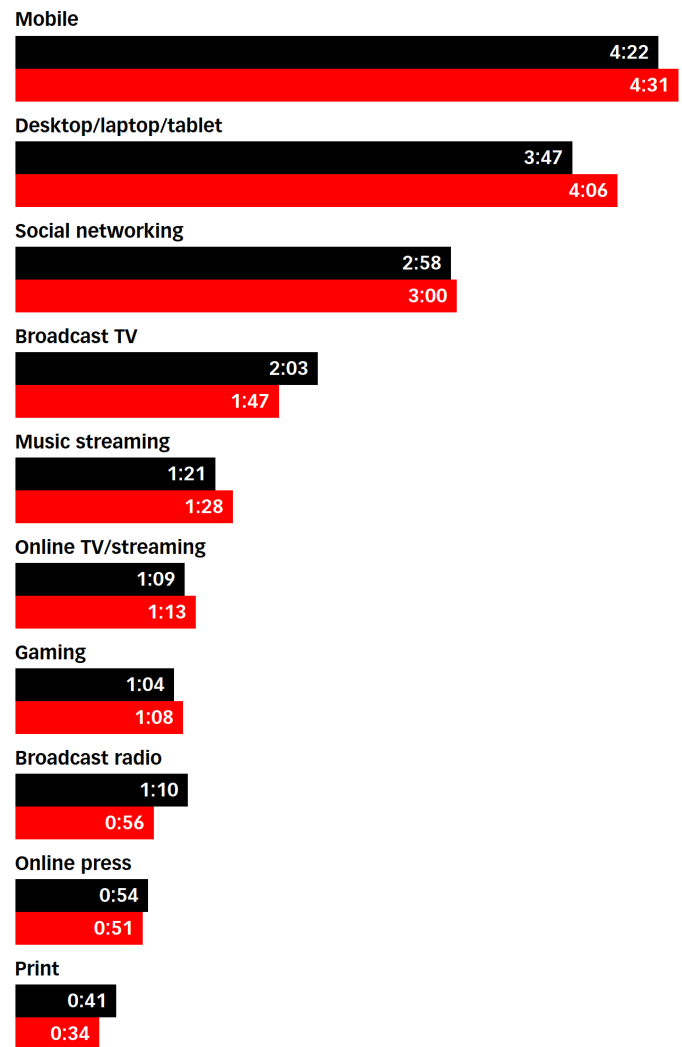
Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20796

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Average Time Spent with Media in Malaysia, H1 2019 & H1 2020

hrs:mins per day among internet users



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20793

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Traditional Media Users in Malaysia, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20800

www.eMarketer.com

Traditional Media Users in Malaysia, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	47.7%	60.3%	83.1%	86.7%
Male	55.3%	65.1%	83.8%	87.7%
Age				
16-24	34.5%	45.7%	80.0%	80.1%
25-34	58.6%	67.8%	84.3%	92.6%
35-44	60.3%	70.6%	85.9%	89.9%
45-54	58.0%	68.4%	94.1%	90.8%
55-64*	-	-	-	-
Annual household income group				
High	56.6%	70.6%	87.6%	92.2%
Medium	58.9%	65.8%	84.3%	88.4%
Low	38.2%	40.3%	74.6%	75.6%
N/A**	22.7%	55.5%	76.5%	80.2%
Household location				
Urban	54.1%	67.9%	83.8%	90.0%
Suburban	48.1%	53.5%	85.0%	80.5%
Rural*	-	-	-	-
Total	51.7%	62.8%	83.5%	87.2%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20799

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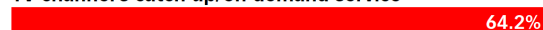
TV Viewers in Malaysia, by Method, H1 2020

% of internet users

Broadcast live on TV channel



TV channel's catch-up/on-demand service



SVOD*



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20801

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Malaysia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	79.3%	73.6%
Male	78.3%	79.1%
Age		
16-24	86.5%	82.9%
25-34	85.5%	86.3%
35-44	77.1%	70.6%
45-54	57.2%	62.1%
55-64*	-	-
Annual household income group		
High	76.5%	75.1%
Medium	80.2%	73.8%
Low	81.6%	84.7%
N/A**	79.8%	79.5%
Household location		
Urban	78.6%	79.3%
Suburban	78.1%	70.8%
Rural*	-	-
Total	78.8%	76.5%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20802

www.eMarketer.com

Social Media Users in Malaysia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	91.5%	92.0%
Male	92.5%	91.3%
Age		
16-24	93.3%	93.2%
25-34	92.8%	91.8%
35-44	91.4%	90.4%
45-54	89.4%	89.2%
55-64*	-	-
Annual household income group		
High	90.7%	90.4%
Medium	91.5%	92.9%
Low	94.9%	91.9%
N/A**	90.1%	90.6%
Household location		
Urban	91.7%	92.3%
Suburban	92.4%	90.8%
Rural*	-	-
Total	92.0%	91.6%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20798

www.eMarketer.com

Digital Audio Listeners in Malaysia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	80.9%	76.5%
Male	72.9%	81.9%
Age		
16-24	94.8%	91.9%
25-34	84.4%	85.5%
35-44	61.1%	71.8%
45-54	51.6%	61.2%
55-64*	-	-
Annual household income group		
High	74.3%	76.1%
Medium	78.1%	79.4%
Low	80.2%	88.9%
N/A**	79.1%	76.4%
Household location		
Urban	78.3%	81.6%
Suburban	72.2%	74.3%
Rural*	-	-
Total	76.9%	79.4%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20794

www.eMarketer.com

Voice Search Users in Malaysia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	31.2%	31.6%
Male	36.8%	37.1%
Age		
16-24	43.5%	46.6%
25-34	39.0%	40.2%
35-44	28.5%	28.5%
45-54	25.3%	18.2%
55-64*	-	-
Annual household income group		
High	33.7%	33.8%
Medium	33.2%	32.2%
Low	36.7%	40.9%
N/A**	33.3%	33.2%
Household location		
Urban	36.4%	36.6%
Suburban	29.2%	31.7%
Rural*	-	-
Total	34.0%	34.4%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20803

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KEY FEATURES

Internet users in Mexico spent much more time with digital devices and activities in H1 2020.

- Social networking is a case in point. About 90% of respondents ages 16 to 64 polled in H1 2020 had used social media in the month prior, according to GlobalWebIndex. But this year, time spent with social networks reached 3 hours, 26 minutes (3:26) daily, on average—11 minutes more than in H1 2019, and the third-largest slice of media time overall. (GlobalWebIndex's social media category includes YouTube, which tends to boost calculations of penetration and time spent with the medium.)
- Time devoted to online TV and video streaming also rose year-over-year (YoY) from 1:10 to 1:29. And gaming posted a similar increase from 1:12 to 1:27.
- Overall engagement with digital audio increased marginally in Mexico between H1 2019 and H1 2020 to 88.3% of internet users. But time spent each day with music streaming jumped from 1:46 to 2:10.
- It's not clear how much of this rise in digital activity can be traced to pandemic-driven lockdowns and other disruptions to normal life. Yet these shifts were greater than the incremental increases one might have expected.

Several traditional media formats seem to be losing appeal, while digital entertainment continues to make gains.

- Given the surge in time spent on digital platforms, it's not surprising that offline media registered a different trend. For example, print newspaper penetration shrank by nearly 6 percentage points between Q1 2019 and Q1 2020, to 53.0% of internet users, according to GlobalWebIndex and Publicis Media.
- The share of respondents listening to broadcast radio in the month prior to polling slipped to 71.6% this year; 51.9% had read a print magazine, compared with 55.4% in Q1 2019. Engagement with print publications remained highest among males, affluents, and those ages 35 and older.

- Penetration of live television also declined, but was still high in H1 2020, at 88.9%. Crucially, the share of internet users who watched films or TV shows via subscription video-on-demand (SVOD) services, such as Netflix or HBO Go, in the prior month rose to 90.4%—surpassing the reach of live TV for the first time. Mexico was the only country where that switch took place this year, per GlobalWebIndex.
- Smart TV ownership was also high by global standards, at 56.3%. But notable levels of takeup for connected TV and SVOD clearly reflect an urban skew in the survey population and relatively low representation of older residents. In total, 94.1% of respondents said they had streamed video of some kind in the month prior to polling.

Smartphones are ubiquitous, but ownership of PCs and tablets isn't holding up so well.

- Almost 98% of internet users polled in Mexico in H1 2020 owned a smartphone. Ownership of desktop and laptop PCs was nearly 25 percentage points lower at 73.9%—and that gap had widened since H1 2019.
- Tablet penetration had also fallen YoY, to 45.9%. Ownership skewed toward affluent respondents and those living in urban areas and was also more widespread among older internet users.
- As PC and tablet ownership shrank, the time spent with those larger screens declined, too. For the first time, GlobalWebIndex found that the average daily time spent with mobile devices surpassed time spent with PCs and tablets, at 4:27 and 4:15, respectively.
- Game console penetration continued to lag slightly behind tablets at 43.3% in H1 2020. Predictably, ownership was above average among males, 16- to 44-year-olds, and respondents in middle- and high-income homes.
- Adoption of smartwatches was lukewarm in Mexico, but internet users were still more likely to own one than in most other countries in Latin America. Ownership in Mexico reached 13.5% this year, while penetration rates in Argentina, Brazil, and Colombia were 7.8%, 11.3%, and 12.0%, respectively, in H1 2020.

- Voice search has become the norm for many internet users, with penetration reaching 51.0% in H1 2020. Takeup was lower in older age brackets, but nearly 41% of respondents ages 45 to 54 said they used tools like Cortana or Siri to find information or used voice commands with a smart speaker.
- By contrast, smart home products—such as household security systems controlled via a mobile app—hadn't gained much traction in Mexico. Barely one in 10 internet users polled in H1 2020 owned a smart home item, though penetration reached 15.6% among affluent respondents.

Device Ownership in Mexico, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	98.4%	97.6%
Desktop/laptop	76.7%	73.9%
Smart TV	57.9%	56.3%
Tablet	48.7%	45.9%
Game console	45.6%	43.3%
TV streaming stick/device	19.8%	20.7%
Smartwatch	11.7%	13.5%
Feature phone	12.6%	10.4%
Smart home device	8.8%	10.4%
Smart wristband	5.3%	7.1%
VR headset/device	5.1%	5.1%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20561

www.eMarketer.com

Smartphone and Tablet Owners in Mexico, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.5%	98.0%	48.9%	48.0%
Male	98.2%	97.2%	48.6%	43.8%
Age				
16-24	98.6%	96.4%	40.0%	37.1%
25-34	98.8%	98.1%	49.7%	46.3%
35-44	98.2%	98.3%	56.3%	52.9%
45-54	98.0%	98.3%	54.0%	53.7%
55-64*	-	-	-	-
Annual household income group				
High	99.0%	98.9%	63.2%	59.7%
Medium	98.8%	98.7%	50.5%	51.2%
Low	98.1%	96.9%	35.1%	33.8%
N/A**	95.5%	93.4%	34.1%	33.1%
Household location				
Urban	98.5%	98.2%	51.8%	49.1%
Suburban	97.8%	96.1%	39.8%	36.3%
Rural*	-	-	-	-
Total	98.4%	97.6%	48.7%	45.9%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20808

www.eMarketer.com

Smart TV Owners in Mexico, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	58.1%	58.0%
Male	57.7%	54.8%
Age		
16-24	52.5%	51.6%
25-34	56.3%	55.5%
35-44	61.7%	60.8%
45-54	66.6%	59.8%
55-64*	-	-
Annual household income group		
High	70.8%	63.5%
Medium	60.5%	64.8%
Low	45.2%	46.9%
N/A**	43.8%	43.0%
Household location		
Urban	61.2%	58.8%
Suburban	47.8%	50.2%
Rural*	-	-
Total	57.9%	56.3%

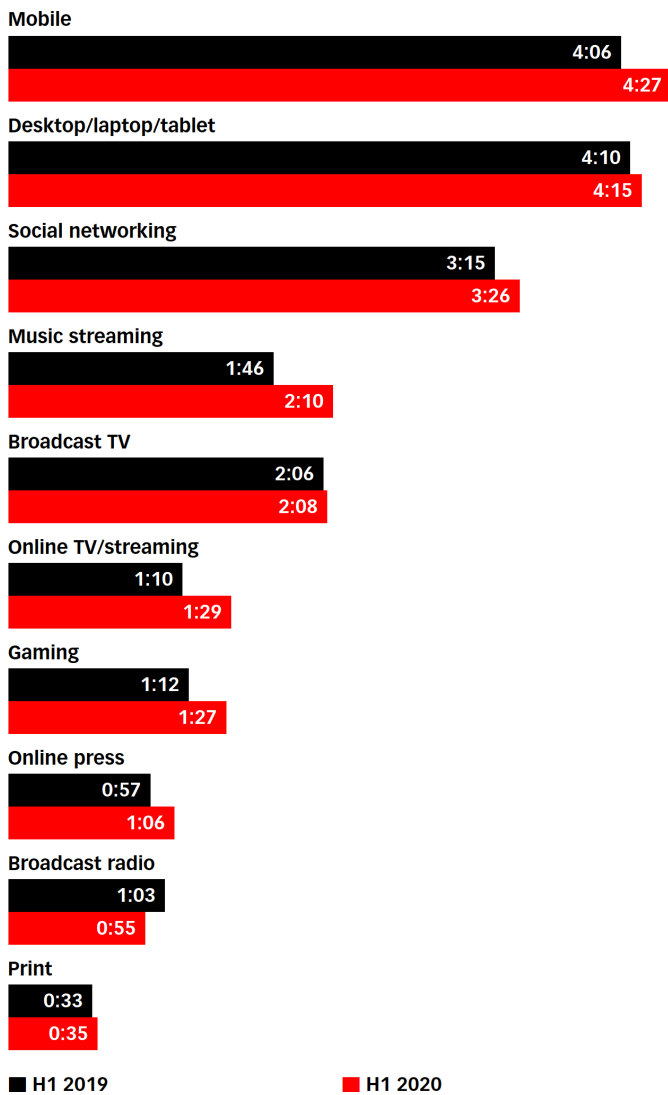
Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20807

www.eMarketer.com

Average Time Spent with Media in Mexico, H1 2019 & H1 2020

hrs:mins per day among internet users



Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

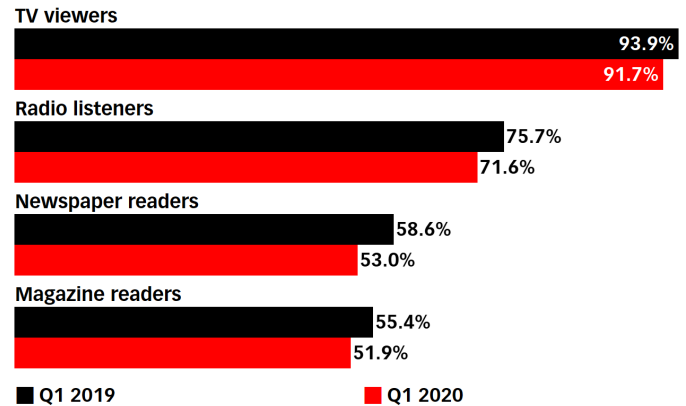
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20804

www.eMarketer.com

Traditional Media Users in Mexico, Q1 2019 & Q1 2020

% of internet users



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20811

www.eMarketer.com

Traditional Media Users in Mexico, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	49.9%	50.0%	72.2%	93.9%
Male	53.8%	55.9%	71.0%	89.5%
Age				
16-24	43.3%	44.4%	61.7%	88.1%
25-34	52.2%	53.4%	70.5%	92.7%
35-44	59.4%	61.8%	80.7%	92.9%
45-54	58.1%	54.2%	82.5%	94.6%
55-64*	-	-	-	-
Annual household income group				
High	56.6%	57.2%	77.6%	93.3%
Medium	50.5%	50.8%	71.0%	92.5%
Low	51.3%	53.1%	67.4%	90.5%
N/A**	43.5%	46.8%	68.2%	88.4%
Household location				
Urban	53.5%	54.8%	71.7%	92.4%
Suburban	41.1%	43.0%	71.3%	89.0%
Rural*	-	-	-	-
Total	51.9%	53.0%	71.6%	91.7%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20810

www.eMarketer.com

TV Viewers in Mexico, by Method, H1 2020

% of internet users

SVOD*	90.4%
Broadcast live on TV channel	88.9%
TV channel's catch-up/on-demand service	77.4%
Recorded from TV	56.1%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20812 www.eMarketer.com

Video-on-Demand (VOD) Viewers in Mexico, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	94.5%	94.6%
Male	95.6%	93.6%
Age		
16-24	96.6%	94.0%
25-34	96.0%	95.6%
35-44	95.3%	95.6%
45-54	91.7%	90.1%
55-64*	-	-
Annual household income group		
High	97.1%	94.8%
Medium	95.4%	95.4%
Low	92.6%	93.0%
N/A**	92.5%	91.6%
Household location		
Urban	95.3%	94.4%
Suburban	94.0%	93.7%
Rural*	-	-
Total	95.0%	94.1%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20813 www.eMarketer.com

Social Media Users in Mexico, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	89.0%	90.3%
Male	90.8%	89.8%
Age		
16-24	90.7%	90.3%
25-34	91.2%	91.1%
35-44	89.4%	89.4%
45-54	88.3%	89.8%
55-64*	-	-
Annual household income group		
High	89.6%	89.7%
Medium	91.2%	91.8%
Low	90.6%	90.1%
N/A**	85.2%	85.9%
Household location		
Urban	89.8%	89.9%
Suburban	90.0%	91.7%
Rural*	-	-
Total	89.9%	90.1%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Taringa!, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20809 www.eMarketer.com

Digital Audio Listeners in Mexico, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	86.0%	87.7%
Male	89.3%	88.9%
Age		
16-24	94.8%	91.0%
25-34	88.3%	92.1%
35-44	84.1%	85.4%
45-54	84.7%	82.3%
55-64*	-	-
Annual household income group		
High	89.9%	89.7%
Medium	88.0%	87.6%
Low	84.9%	88.3%
N/A**	85.0%	86.8%
Household location		
Urban	87.8%	88.9%
Suburban	87.0%	85.2%
Rural*	-	-
Total	87.6%	88.3%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20805

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Voice Search Users in Mexico, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	43.6%	49.4%
Male	52.1%	52.5%
Age		
16-24	51.9%	57.2%
25-34	54.6%	52.5%
35-44	46.0%	49.5%
45-54	34.7%	40.8%
55-64*	-	-
Annual household income group		
High	53.4%	55.9%
Medium	48.9%	51.8%
Low	42.8%	49.0%
N/A**	37.9%	42.7%
Household location		
Urban	48.0%	51.9%
Suburban	49.0%	48.1%
Rural*	-	-
Total	47.9%	51.0%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20814

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NETHERLANDS

KEY FEATURES

The media landscape in the Netherlands still very much includes PC use, though smartphones are now more widespread.

- Smartphone ownership first overtook desktop/laptop ownership in the Netherlands in 2018, according to GlobalWebIndex, and that gap widened to 10 percentage points this year. In H1 2020, 95.0% of internet users ages 16 to 64 owned a smartphone, while 84.9% owned a PC. Tablets, like PCs, posted a marginal decline in ownership, to 56.9%. Yet penetration of both PCs and tablets remains high compared with most countries surveyed. This is to be expected in a small, highly literate nation where most people enjoy a comfortable standard of living, and where PCs were affordable and well established before smartphones.
- That helps to explain why PCs and tablets once again claimed the single-greatest slice of media time among internet users in the Netherlands in H1 2020, at an average of 2 hours, 47 minutes (2:47) per day.
- Last year, broadcast TV ranked second in terms of time spent, at an average 2:18 daily. In H1 2020, that had fallen to 2:12, while time spent with mobile devices rose to 2:14. In other words, mobile time finally exceeded broadcast TV time in H1 2020—and by just 2 minutes.

Digital behaviors are spreading, but adoption of many advanced devices remains modest, even among younger internet users.

- Broadcast TV remains a central part of internet users' media experience in the Netherlands, according to GlobalWebIndex. Nearly 88% of respondents had watched live TV in the month prior to polling in H1 2020, while 62.8% had used a channel's catch-up or on-demand services. Time-shifted viewing was more common among 16- to 34-year-olds and those in middle- and high-income households.

- Meanwhile, digital video consumption increased rapidly between H1 2019 and H1 2020. Over 76% of internet users polled in H1 2020—including 95.6% of those 16 to 24—streamed video content in the prior month. Engagement with subscription video-on-demand (SVOD) offerings such as Netflix and Amazon Prime Video rose to 68.6%. This was higher than the regional average; in France and Germany, SVOD penetration lingered below 65% this year, for example, though Spain and the UK registered over 75%. Usage in the Netherlands correlated directly with age; in the youngest cohort, 91.4% were SVOD viewers, compared with 42.2% of those 55 to 64.
- Penetration of digital audio was also up by several percentage points in H1 2020. Six in 10 internet users had streamed music, podcasts, or other digital audio content in the month prior to polling. Like digital video viewers, digital audio listeners skewed higher in urban areas and among younger age groups.
- Owning a smart TV was apparently a greater priority in recent years, especially among respondents in middle- and high-income households, where penetration remained above 52% in H1 2020. However, overall ownership of connected TVs fell slightly, to 48.1% of internet users.
- By contrast, GlobalWebIndex found little enthusiasm for advanced digital devices. Between H1 2019 and H1 2020, the shares of internet users owning smartwatches and smart wristbands reached just 10.9% and 8.1%, respectively—though smartwatch penetration reached double digits among some demographic groups. Just 9.6% of respondents owned a smart home device in H1 2020, compared with 7.5% in H1 2019.
- Though voice command tools like Siri and Cortana are now available on many digital devices, including smart speakers, the share of internet users using voice search rose only modestly between H1 2019 and H1 2020, from 17.7% to 19.0%. Typical early-adopter demographics were at the forefront. Some 38.0% of 16- to 24-year-olds had used voice command tools, and penetration passed 22% among males, city dwellers, the most affluent respondents, and those ages 25 to 34.

- At the same time, traditional media is proving more resilient in the Netherlands than in most other countries. In Q1 2020, 58.5% of respondents read a print newspaper in the prior month, and 52.1% read a print magazine. Both figures were lower than in Q1 2019, though not dramatically. Moreover, print readership remained substantially greater among affluents, older age brackets, and in rural areas. The average time spent per day with print media was 1 minute higher than in 2019, at 28 minutes, but online press claimed 39 minutes per day.
- Broadcast radio also maintained an enviable reach, at 83.2% of internet users, while time spent with radio averaged 1:49 per day.

Device Ownership in the Netherlands, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	94.9%	95.0%
Desktop/laptop	86.3%	84.9%
Tablet	57.7%	56.9%
Smart TV	49.7%	48.1%
Game console	30.2%	28.8%
TV streaming stick/device	15.6%	18.0%
Smartwatch	9.2%	10.9%
Smart home device	7.5%	9.6%
Smart wristband	5.0%	8.1%
VR headset/device	4.5%	3.9%
Feature phone	5.0%	3.6%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20576

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Smartphone and Tablet Owners in the Netherlands, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.5%	96.4%	59.7%	58.9%
Male	93.3%	93.6%	55.7%	54.8%
Age				
16-24	98.5%	96.5%	50.8%	50.9%
25-34	95.8%	95.8%	49.4%	55.9%
35-44	95.8%	94.9%	64.4%	59.6%
45-54	95.2%	95.5%	58.6%	58.0%
55-64	89.1%	92.3%	64.5%	59.4%
Annual household income group				
High	96.5%	96.7%	70.3%	67.2%
Medium	95.8%	95.7%	59.1%	62.0%
Low	92.9%	92.8%	47.2%	48.3%
N/A*	95.2%	95.6%	56.4%	49.6%
Household location				
Urban	94.8%	95.0%	56.1%	55.6%
Suburban	95.4%	94.7%	60.4%	57.0%
Rural	93.0%	96.4%	53.7%	62.6%
Total	94.9%	95.0%	57.7%	56.9%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20819

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Smart TV Owners in the Netherlands, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	48.7%	46.8%
Male	50.7%	49.4%
Age		
16-24	47.5%	40.8%
25-34	51.0%	46.6%
35-44	53.2%	51.3%
45-54	49.3%	53.7%
55-64	47.6%	46.7%
Annual household income group		
High	58.1%	58.7%
Medium	55.0%	52.2%
Low	40.0%	37.3%
N/A*	48.0%	44.2%
Household location		
Urban	50.3%	49.0%
Suburban	49.9%	47.3%
Rural	45.8%	46.1%
Total	49.7%	48.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20818

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Average Time Spent with Media in the Netherlands, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Broadcast radio



Social networking



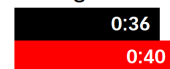
Music streaming



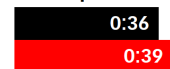
Online TV/streaming



Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20815

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Traditional Media Users in the Netherlands, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20822

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Traditional Media Users in the Netherlands, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	48.6%	53.1%	86.1%	91.5%
Male	55.5%	63.8%	80.4%	90.1%
Age				
16-24	40.6%	48.3%	81.2%	87.4%
25-34	44.7%	51.6%	77.6%	84.8%
35-44	58.5%	55.0%	86.3%	91.1%
45-54	56.3%	67.2%	84.1%	92.0%
55-64	58.8%	68.0%	86.5%	98.0%
Annual household income group				
High	58.8%	65.4%	88.2%	94.6%
Medium	54.9%	62.0%	87.7%	94.2%
Low	49.2%	54.5%	77.5%	88.5%
N/A*	46.5%	53.2%	81.9%	87.3%
Household location				
Urban	52.9%	57.0%	81.1%	90.6%
Suburban	48.7%	57.9%	84.3%	89.8%
Rural	59.0%	66.5%	89.4%	94.8%
Total	52.1%	58.5%	83.2%	90.8%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20821

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TV Viewers in the Netherlands, by Method, H1 2020

% of internet users

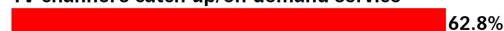
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20823

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Video-on-Demand (VOD) Viewers in the Netherlands, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	68.7%	75.3%
Male	68.9%	77.0%
Age		
16-24	88.2%	95.6%
25-34	85.0%	88.3%
35-44	66.0%	81.0%
45-54	64.8%	66.4%
55-64	42.2%	52.7%
Annual household income group		
High	71.9%	85.3%
Medium	71.1%	78.7%
Low	65.4%	69.4%
N/A*	67.7%	72.1%
Household location		
Urban	71.1%	78.7%
Suburban	68.8%	75.9%
Rural	57.9%	64.9%
Total	68.8%	76.2%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20824

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Social Media Users in the Netherlands, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	83.4%	84.1%
Male	82.7%	83.2%
Age		
16-24	89.0%	89.3%
25-34	85.2%	83.4%
35-44	80.8%	84.5%
45-54	80.5%	82.2%
55-64	80.5%	79.3%
Annual household income group		
High	83.9%	85.2%
Medium	84.6%	86.4%
Low	82.6%	81.3%
N/A*	80.3%	82.3%
Household location		
Urban	84.4%	84.1%
Suburban	82.6%	84.2%
Rural	78.5%	79.1%
Total	83.1%	83.6%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20820

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Digital Audio Listeners in the Netherlands, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	49.0%	54.7%
Male	56.4%	65.2%
Age		
16-24	84.7%	90.3%
25-34	70.5%	73.1%
35-44	40.7%	58.8%
45-54	44.0%	50.0%
55-64	27.2%	31.4%
Annual household income group		
High	58.4%	62.4%
Medium	49.6%	62.9%
Low	50.8%	59.2%
N/A*	51.6%	55.6%
Household location		
Urban	60.8%	63.3%
Suburban	46.0%	59.4%
Rural	43.4%	45.5%
Total	52.7%	60.0%

Note: services include Amazon Music Unlimited, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20816

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Voice Search Users in the Netherlands, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	13.2%	12.6%
Male	22.3%	25.0%
Age		
16-24	32.5%	38.0%
25-34	24.7%	24.1%
35-44	15.8%	16.3%
45-54	11.3%	12.4%
55-64	8.3%	6.8%
Annual household income group		
High	22.2%	21.4%
Medium	13.1%	18.0%
Low	18.6%	17.2%
N/A*	15.4%	18.0%
Household location		
Urban	19.0%	22.9%
Suburban	16.7%	14.5%
Rural	15.6%	16.2%
Total	17.7%	19.0%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20825

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KEY FEATURES

PCs and smartphones are widespread in this advanced economy, and penetration rates of both devices may have stabilized.

- In H1 2020, 94.5% of internet users ages 16 to 64 polled in New Zealand owned a smartphone—a share virtually unchanged since H1 2019, according to GlobalWebIndex. The share owning a desktop or laptop slipped very marginally, to 83.1%. Tablet ownership posted a greater decline, from 48.6% to 45.4%; just 4.8% of those polled owned a feature phone.
- Larger-screen devices accounted for substantially more media time, though. Altogether, activities on desktops, laptops, and tablets consumed an average 3 hours, 37 minutes (3:37) per day in H1 2020, compared with 2:38 spent on mobile phones. Mobile time had risen by 6 minutes between H1 2019 and H1 2020, while PC/tablet time had declined by 1 minute.

Most options for TV and video viewing drew larger audiences in 2020.

- Overall, 90.2% of respondents in Q1 2020 had watched TV content in some form in the prior month, GlobalWebIndex and Publicis Media reported. More than three-quarters (75.7%) of internet users watched live TV, while two-thirds (66.7%) used broadcasters' catch-up services. Importantly, subscription video-on-demand (SVOD) services had closed the gap with broadcast TV, reaching 76.0% of internet users.
- Video streaming was also more popular than in H1 2019. In total, 87.8% of internet users surveyed this year had accessed some type of VOD content via digital platforms in the previous month. In the 16-to-34 age bracket, over 93% had done so. Digital video consumption was more common among younger respondents and the affluent, though these distinctions are diminishing as penetration rises.

- Despite this, time spent with broadcast TV was still well ahead of time spent with online TV in New Zealand, at 1:56 per day and 1:11, respectively. Broadcast TV also claimed more time than social networking, which averaged 1:48 each day. (GlobalWebIndex includes YouTube in its social category, and this tends to boost both reach and time spent for social media overall.)
- Time spent with music streaming has now surpassed time spent with broadcast radio, however. In H1 2020, respondents spent an average 1:13 daily streaming music, versus 1:03 with radio.

Ownership of advanced digital devices barely increased during the year.

- Penetration of smartwatches and smart wristbands rose by a few percentage points year over year, to 14.3% and 12.7%, respectively. As in 2019, both devices were more likely to be found on the arms of New Zealand's affluent consumers and those ages 25 to 44. Females also overindexed for ownership of smart wristbands.
- Similarly, smart home products are struggling to find buyers. In H1 2020, just 9.7% of males owned this type of device and 7.2% of females. But ownership did pass 10% among internet users in affluent homes and those ages 35 to 44.
- The share of internet users who owned a smart TV climbed only marginally, from 43.3% in H1 2019 to 44.9% in H1 2020. However, ownership passed 50% among respondents ages 45 to 54 and those in middle- and high-income households.

Device Ownership in New Zealand, H1 2019 & H1 2020
% of internet users

	H1 2019	H1 2020
Smartphone	94.3%	94.5%
Desktop/laptop	84.0%	83.1%
Tablet	48.6%	45.4%
Smart TV	43.3%	44.9%
Game console	34.2%	32.9%
TV streaming stick/device	23.1%	26.2%
Smartwatch	10.4%	14.3%
Smart wristband	10.2%	12.7%
Smart home device	6.4%	8.4%
Feature phone	5.9%	4.8%
VR headset/device	4.8%	3.3%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20562

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Smartphone and Tablet Owners in New Zealand, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	95.7%	95.1%	48.2%	46.5%
Male	92.9%	93.9%	49.1%	44.3%
Age				
16-24	96.5%	97.7%	36.7%	29.7%
25-34	96.7%	96.3%	47.3%	45.1%
35-44	95.6%	95.1%	58.0%	52.0%
45-54	92.1%	94.9%	54.4%	54.7%
55-64	89.2%	86.4%	48.1%	47.9%
Annual household income group				
High	96.1%	96.3%	57.3%	55.0%
Medium	95.4%	95.2%	51.9%	48.4%
Low	92.4%	90.9%	40.1%	33.8%
N/A*	92.9%	96.1%	43.8%	39.9%
Household location				
Urban	93.0%	95.6%	45.6%	43.1%
Suburban	95.0%	93.8%	50.4%	45.8%
Rural	94.6%	94.8%	48.5%	49.2%
Total	94.3%	94.5%	48.6%	45.4%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20830

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Smart TV Owners in New Zealand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	41.5%	46.3%
Male	45.2%	43.4%
Age		
16-24	34.8%	33.7%
25-34	41.0%	46.8%
35-44	50.0%	47.4%
45-54	45.3%	50.6%
55-64	47.8%	47.6%
Annual household income group		
High	56.0%	55.1%
Medium	48.0%	50.4%
Low	30.2%	32.6%
N/A*	37.9%	34.2%
Household location		
Urban	38.2%	39.8%
Suburban	47.4%	47.4%
Rural	39.1%	45.6%
Total	43.3%	44.9%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20829

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Average Time Spent with Media in New Zealand, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



Music streaming



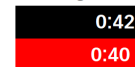
Online TV/streaming



Broadcast radio



Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20826

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Traditional Media Users in New Zealand, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20833

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Traditional Media Users in New Zealand, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	51.6%	48.4%	83.3%	91.8%
Male	45.5%	55.5%	73.9%	88.5%
Age				
16-24	31.8%	36.7%	65.4%	85.1%
25-34	37.4%	44.5%	76.8%	84.7%
35-44	55.0%	55.4%	81.2%	94.8%
45-54	59.4%	58.6%	89.2%	92.2%
55-64	65.5%	70.2%	83.4%	96.1%
Annual household income group				
High	58.9%	58.3%	87.2%	94.0%
Medium	53.2%	58.5%	83.0%	90.0%
Low	33.5%	39.6%	69.6%	87.2%
N/A*	45.0%	47.5%	67.7%	87.6%
Household location				
Urban	45.7%	51.7%	74.9%	90.5%
Suburban	48.0%	52.0%	78.6%	89.5%
Rural	58.3%	51.8%	88.0%	92.7%
Total	48.6%	51.9%	78.7%	90.2%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20832

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TV Viewers in New Zealand, by Method, H1 2020

% of internet users

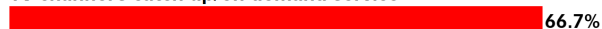
SVOD*



Broadcast live on TV channel



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20834

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Video-on-Demand (VOD) Viewers in New Zealand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	86.6%	87.1%
Male	84.2%	88.5%
Age		
16-24	91.6%	94.9%
25-34	92.0%	93.3%
35-44	87.1%	86.2%
45-54	80.3%	82.7%
55-64	72.9%	79.0%
Annual household income group		
High	88.1%	89.3%
Medium	88.7%	88.6%
Low	81.7%	83.5%
N/A*	81.6%	90.1%
Household location		
Urban	85.2%	90.5%
Suburban	85.8%	86.3%
Rural	84.6%	88.5%
Total	85.5%	87.8%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20835

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Social Media Users in New Zealand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	87.7%	88.8%
Male	86.8%	86.0%
Age		
16-24	90.9%	88.5%
25-34	88.1%	88.8%
35-44	87.0%	89.0%
45-54	85.1%	86.1%
55-64	83.9%	83.7%
Annual household income group		
High	91.2%	90.0%
Medium	87.3%	87.8%
Low	86.2%	84.9%
N/A*	81.8%	85.4%
Household location		
Urban	87.3%	88.3%
Suburban	87.8%	87.1%
Rural	85.0%	86.6%
Total	87.2%	87.4%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Neighbourly, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20831

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Digital Audio Listeners in New Zealand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	72.3%	71.8%
Male	71.5%	74.3%
Age		
16-24	93.6%	91.1%
25-34	81.6%	84.9%
35-44	74.5%	71.0%
45-54	54.4%	63.3%
55-64	47.6%	46.8%
Annual household income group		
High	76.5%	73.3%
Medium	73.0%	73.0%
Low	65.7%	68.8%
N/A*	72.6%	80.1%
Household location		
Urban	74.0%	83.7%
Suburban	71.8%	68.6%
Rural	66.9%	69.2%
Total	71.9%	73.0%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iHeartRadio, iTunes, Musify, SoundCloud, Spotify, Tidal, YouTube Music and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20827

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Voice Search Users in New Zealand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	20.2%	22.5%
Male	29.2%	30.4%
Age		
16-24	32.9%	38.2%
25-34	28.4%	29.7%
35-44	26.1%	28.2%
45-54	18.0%	19.1%
55-64	15.1%	12.9%
Annual household income group		
High	26.4%	25.6%
Medium	25.7%	30.4%
Low	23.8%	24.6%
N/A*	20.9%	23.9%
Household location		
Urban	28.7%	33.9%
Suburban	22.3%	23.2%
Rural	24.0%	22.8%
Total	24.6%	26.4%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20836

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KEY FEATURES

Smartphones reign supreme among internet users polled in the Philippines, but PC numbers have risen.

- Internet use in the Philippines was effectively synonymous with smartphone ownership in H1 2020, judging by data from GlobalWebIndex. Fully 98.6% of the respondents ages 16 to 64 owned an advanced handset; 14.2% had a feature phone. Desktop/laptop penetration lagged substantially below that of smartphones, but it had risen 9.4 percentage points in a single year, to 77.1%. Tablet ownership declined slightly, to 37.0%.
- It's worth noting that the online population is largely composed of younger people. Hence the long periods that internet users were engaged with digital devices. As in 2019, the combined time spent on PCs, smartphones, and tablets exceeded 10 hours per day. Mobile claimed the larger share, at 5 hours, 30 minutes (5:30), while PCs and tablets clocked an average 4:38 each day.
- Social networking was also effectively universal—93.4% of respondents accessed social platforms in the prior month—and ranked third in terms of time spent, at just under 4 hours per day in H1 2020.
- While digital media proliferates, broadcast and time-shifted TV still draw many viewers. Some 91.0% of internet users watched live TV in the prior month. Nearly three-quarters of respondents used a TV channel's catch-up or on-demand service during that period. However, daily time spent with broadcast TV declined to 2:07 from H1 2019's 2:21.
- By comparison, online TV and video streaming claimed a daily 1:27. Overall, 91.4% of internet users had streamed video content in the month prior—effectively the same share as those who had watched live TV.

- Meanwhile, video viewers are also signing on to paid services such as Netflix. Nearly 73% of respondents watched TV shows or movies via subscription video-on-demand (SVOD) in the prior month, rising by 2.1 percentage points year over year (YoY). That was a more modest increase than GlobalWebIndex found in many other countries, but usage was already notably high in the Philippines—clear evidence that access to video content is a priority for internet users across demographics.
- In terms of gaming, it seems that many members of a household share access to a single device. Just 12.6% of respondents owned a game console in H1 2020, yet the average time spent gaming per day was 1:22.
- Digital audio may make fewer headlines than digital video does, but it now commands an equally large audience in the Philippines, at 91.5% of internet users. Music streaming alone accounted for just over 2 hours daily.
- The appeal of broadcast radio also remains relatively broad; 66.5% of those surveyed in Q1 2020 were recent listeners. However, average time spent each day with live radio, at 46 minutes, had fallen by 7 minutes since H1 2019.

Few internet users own advanced digital devices, though affordability is likely an issue for many.

- Smart TV ownership rose by nearly 5 percentage points to an estimated 36.4% of internet users in H1 2020 but still correlated directly with income. Penetration ranged from 29.0% among respondents in low-income households to 46.3% among affluent.
- Smartwatch adoption seems to have reached a standstill. A mere 7.4% owned a smartwatch in H1 2020, practically unchanged since H1 2019. In particular, GlobalWebIndex reported falling interest among better-off respondents. Ownership of smart wristbands climbed from 3.3% to 4.0%. Smart home devices registered very limited appeal, too, at 4.1%.
- Intriguingly, voice search doesn't seem to be expanding either. The share of respondents who had used a voice assistant such as Siri or Cortana in the prior month fell YoY, from 40.3% to 38.5%. Usage was far higher in younger age brackets, but otherwise quite similar across income levels and locations.

Device Ownership in the Philippines, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	98.5%	98.6%
Desktop/laptop	67.7%	77.1%
Tablet	37.7%	37.0%
Smart TV	31.5%	36.4%
Feature phone	15.2%	14.2%
Game console	13.3%	12.6%
TV streaming stick/device	9.3%	9.1%
Smartwatch	7.5%	7.4%
Smart home device	6.0%	4.1%
Smart wristband	3.3%	4.0%
VR headset/device	3.1%	2.3%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smartphone and Tablet Owners in the Philippines, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.8%	99.0%	39.5%	39.1%
Male	98.3%	98.2%	35.9%	34.8%
Age				
16-24	98.8%	98.6%	29.9%	29.6%
25-34	98.8%	99.0%	38.4%	36.0%
35-44	97.4%	98.9%	46.6%	47.2%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	99.4%	99.5%	53.4%	49.5%
Medium	99.1%	98.9%	40.3%	36.4%
Low	97.5%	97.6%	26.8%	26.4%
N/A**	97.8%	97.2%	23.0%	27.4%
Household location				
Urban	98.7%	98.8%	38.7%	37.5%
Suburban	98.4%	98.4%	44.9%	39.0%
Rural	98.1%	98.0%	29.7%	32.9%
Total	98.5%	98.6%	37.7%	37.0%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smart TV Owners in the Philippines, H1 2019 & H1 2020 % of internet users, by demographic

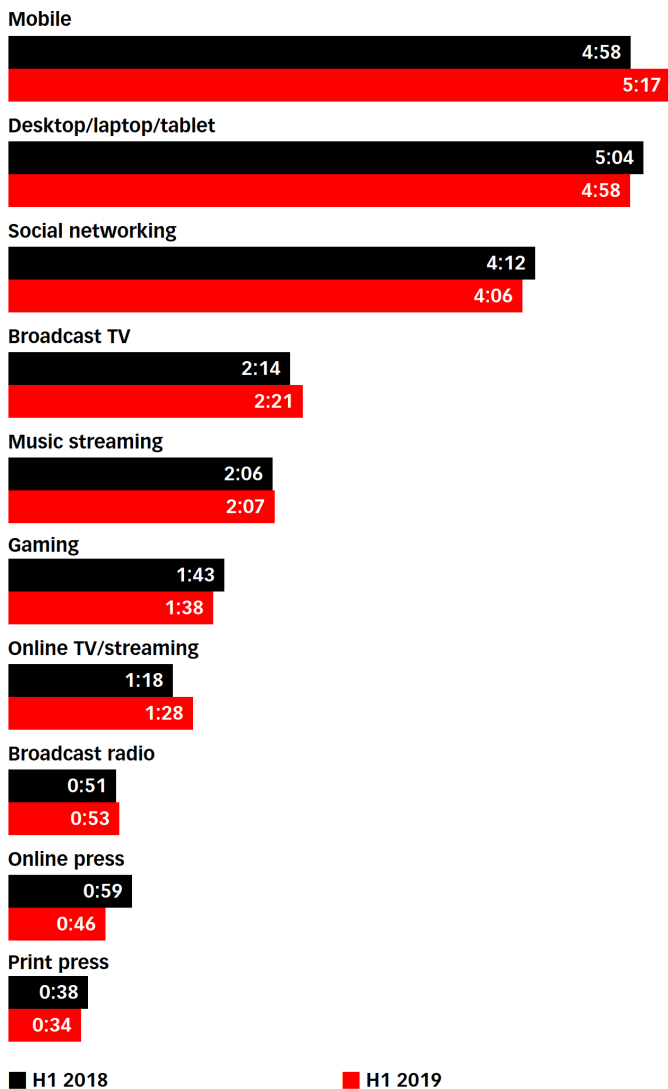
	H1 2019	H1 2020
Gender		
Female	31.3%	36.5%
Male	31.6%	36.2%
Age		
16-24	26.3%	31.8%
25-34	35.5%	36.7%
35-44	34.9%	41.1%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	44.0%	46.3%
Medium	31.1%	36.4%
Low	25.9%	29.0%
N/A**	17.6%	23.4%
Household location		
Urban	32.2%	37.1%
Suburban	36.9%	37.1%
Rural	25.5%	33.1%
Total	31.5%	36.4%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Average Time Spent with Media in the Philippines, H1 2018 & H1 2019

hrs:mins per day among internet users



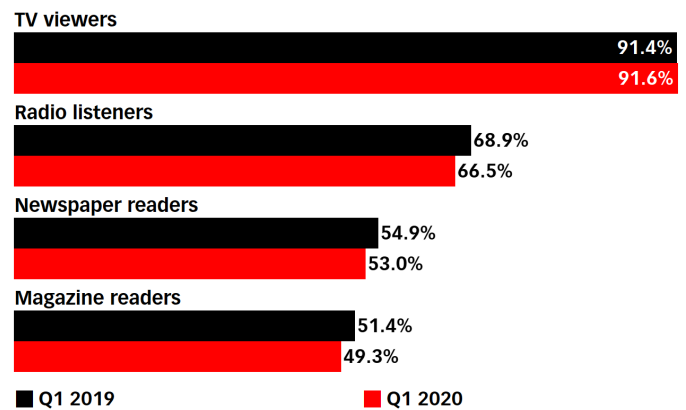
Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019, August 2019

T20022

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Traditional Media Users in the Philippines, Q1 2019 & Q1 2020

% of internet users



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"
Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20844

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Traditional Media Users in the Philippines, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	47.5%	50.6%	65.1%	92.3%
Male	51.1%	55.4%	67.8%	91.0%
Age				
16-24	45.2%	48.3%	58.0%	86.2%
25-34	47.6%	49.2%	67.2%	93.1%
35-44	56.2%	62.6%	78.5%	96.1%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	52.7%	57.2%	72.7%	94.9%
Medium	50.3%	54.7%	68.6%	94.5%
Low	49.6%	50.5%	61.7%	88.0%
N/A**	29.9%	36.0%	46.9%	77.8%
Household location				
Urban	51.1%	55.1%	67.7%	92.2%
Suburban	46.1%	52.0%	67.2%	92.0%
Rural	46.0%	45.9%	60.8%	89.2%
Total	49.3%	53.0%	66.5%	91.6%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20843

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TV Viewers in the Philippines, by Method, H1 2020

% of internet users

Broadcast live on TV channel

91.0%

TV channel's catch-up/on-demand service

73.8%

SVOD*

72.7%

Recorded from TV

52.6%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20845

www.eMarketer.com

Video-on-Demand (VOD) Viewers in the Philippines, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	92.4%	92.1%
Male	93.3%	90.6%
Age		
16-24	93.8%	90.5%
25-34	94.1%	93.5%
35-44	93.1%	93.8%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	91.5%	91.9%
Medium	93.2%	92.9%
Low	95.0%	91.0%
N/A**	86.9%	82.6%
Household location		
Urban	93.3%	92.6%
Suburban	92.4%	89.8%
Rural	91.9%	88.2%
Total	92.8%	91.4%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20846

www.eMarketer.com

Social Media Users in the Philippines, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	92.5%	93.2%
Male	92.2%	93.6%
Age		
16-24	92.1%	93.0%
25-34	92.1%	94.6%
35-44	93.2%	94.0%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	93.4%	94.5%
Medium	93.0%	94.0%
Low	91.4%	92.0%
N/A**	90.3%	91.4%
Household location		
Urban	92.5%	93.4%
Suburban	91.2%	93.9%
Rural	92.7%	92.7%
Total	92.3%	93.4%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20842

www.eMarketer.com

Digital Audio Listeners in the Philippines, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	90.0%	92.1%
Male	91.4%	90.8%
Age		
16-24	94.8%	93.6%
25-34	95.1%	92.3%
35-44	84.1%	90.0%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	88.6%	90.4%
Medium	92.2%	93.0%
Low	91.5%	92.2%
N/A**	88.5%	86.3%
Household location		
Urban	91.4%	92.8%
Suburban	90.1%	89.6%
Rural	88.8%	88.2%
Total	90.7%	91.5%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20838

www.eMarketer.com

Voice Search Users in the Philippines, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	39.3%	35.4%
Male	41.4%	41.6%
Age		
16-24	45.9%	44.7%
25-34	41.7%	42.8%
35-44	36.0%	33.4%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	41.0%	38.7%
Medium	38.4%	39.1%
Low	43.9%	39.8%
N/A**	32.1%	31.6%
Household location		
Urban	41.7%	38.9%
Suburban	39.6%	37.3%
Rural	36.4%	38.8%
Total	40.3%	38.5%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20847

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POLAND

KEY FEATURES

In Poland, as elsewhere, desktops and laptops are gradually becoming less common.

- PCs have been widespread among internet users in Poland in recent years, but penetration fell slightly in 2020. According to GlobalWebIndex, 87.5% of respondents ages 16 to 64 owned a desktop or laptop this year, compared with 88.9% in H1 2019. This incremental decline is a pattern noted in many other countries in H1 2020, as smartphones cement their role as the primary digital device for most of the online population.
- Smartphone ownership rose slightly to 96.9%, as advanced handsets increasingly found their way to older internet users. Some 51.1% of respondents also owned a tablet, including nearly 57% of those ages 35 to 44 and 59.3% of those living in affluent households.

- PCs and tablets continue to claim far more of internet users' time than mobile devices do, at an average 3 hours, 43 minutes (3:43) daily. Mobile time had risen more dramatically than PC time since H1 2019 and accounted for 3:00 daily on average.

Consumption of print media declined slightly, but broadcast radio maintained a loyal audience.

- In Q1 2020, the share of internet users who read a print newspaper in the prior month fell year over year from 65.8% to 64.6%; penetration of print magazines also shrank, from 67.2% to 64.5%. Respondents 45 to 64 were the most likely to consume any print publications.
- The reach of broadcast radio remained greater in Poland than in most other countries, at 85.1%. The share of respondents accessing music or other audio content on digital platforms rose to 62.9%, but live radio occupied almost twice as much time as music streaming on a typical day. Younger internet users were the leading consumers of digital audio, while radio was most popular in the 45-to-54 age bracket.

Digital video has yet to close the gap with live TV, but subscription-based services show real momentum.

- The overwhelming majority of TV viewers in Poland still watch live broadcasts. As in 2019, about 90% of internet users polled in H1 2020 had watched live TV in the prior month. Time spent with broadcast TV barely changed since last year, estimated at 2:25 daily.
- The digital video audience is almost as extensive. About 85% of survey respondents streamed video content of some kind in the prior month; average viewing time was 1:00 per day. Video streaming still correlates directly with age, though, with penetration being much higher among internet users ages 16 to 34 (93.5%) than among those 55 to 64 (65.1%).
- Usage of subscription video-on-demand (SVOD) offerings such as Netflix rose sharply between 2019 and 2020, from 61.5% to 66.2%. Penetration was greatest (over 80%) in the 16-to-34 cohort, and reached 70% or more internet users in middle- and high-income households.

- In Poland, unlike many countries, the share of internet users who used TV broadcasters' catch-up or on-demand services in the prior month (42.9%) was still markedly lower than the share who recorded TV shows and watched them later (64.8%).
- Ownership of smart TVs among internet users passed the halfway mark in H1 2019 and remained very similar in H1 2020, at 51.0%. Penetration was significantly higher among older cohorts and in affluent homes. It's worth noting that ownership had declined in several demographic groups. The greatest percentage gain was in low-income households.
- By comparison, Poland's internet users seem fairly indifferent to many other digital gadgets. More than one-third of those polled in H1 2020 owned a game console, and 15.7% owned a smartwatch. Respondents 16 to 34 and those in affluent households were most likely to be smartwatch owners. Some 13.4% owned a smart wristband. But no other digital devices were owned by more than 10% of respondents. Only 6.2% had a smart home product, such as a remotely controlled security system.

Device Ownership in Poland, H1 2019 & H1 2020
% of internet users

	H1 2019	H1 2020
Smartphone	95.3%	96.9%
Desktop/laptop	88.9%	87.5%
Tablet	49.6%	51.1%
Smart TV	52.4%	51.0%
Game console	35.3%	35.1%
Smartwatch	12.0%	15.7%
Smart wristband	7.6%	13.4%
TV streaming stick/device	9.4%	9.3%
Feature phone	12.0%	9.0%
Smart home device	7.9%	6.2%
VR headset/device	3.8%	3.2%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20563

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Smartphone and Tablet Owners in Poland, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.3%	97.4%	51.9%	53.4%
Male	94.4%	96.4%	47.4%	48.8%
Age				
16-24	98.1%	98.6%	44.7%	46.3%
25-34	98.3%	98.2%	51.4%	52.7%
35-44	95.5%	97.5%	58.6%	56.9%
45-54	94.0%	95.5%	48.2%	52.7%
55-64	87.6%	93.3%	40.4%	43.8%
Annual household income group				
High	97.0%	98.1%	59.7%	59.3%
Medium	95.7%	98.2%	52.6%	53.8%
Low	94.0%	95.4%	42.0%	45.0%
N/A*	94.7%	94.1%	40.7%	39.1%
Household location				
Urban	95.4%	97.0%	50.5%	51.6%
Suburban	94.4%	96.8%	48.8%	57.4%
Rural	95.5%	96.4%	46.7%	44.7%
Total	95.3%	96.9%	49.6%	51.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20852

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Smart TV Owners in Poland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	53.6%	50.9%
Male	51.2%	51.1%
Age		
16-24	47.5%	47.6%
25-34	55.0%	48.6%
35-44	53.0%	53.2%
45-54	53.5%	54.9%
55-64	52.2%	51.8%
Annual household income group		
High	62.9%	55.0%
Medium	55.3%	53.8%
Low	44.4%	48.1%
N/A*	43.8%	40.8%
Household location		
Urban	52.6%	51.5%
Suburban	53.8%	50.1%
Rural	50.6%	49.5%
Total	52.4%	51.0%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20851

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Average Time Spent with Media in Poland, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



Broadcast radio



Music streaming



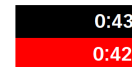
Online TV/streaming



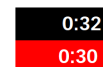
Online press



Gaming



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20848

www.eMarketer.com

Traditional Media Users in Poland, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20855

www.eMarketer.com

Traditional Media Users in Poland, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	65.4%	67.5%	87.5%	93.5%
Male	63.6%	61.7%	82.8%	86.4%
Age				
16-24	55.2%	57.3%	79.4%	81.6%
25-34	63.9%	63.2%	85.2%	88.2%
35-44	66.3%	65.7%	87.9%	92.8%
45-54	70.6%	71.5%	92.0%	95.7%
55-64	68.0%	66.9%	80.5%	93.1%
Annual household income group				
High	67.9%	66.0%	89.9%	94.3%
Medium	66.5%	68.0%	89.0%	89.8%
Low	64.8%	64.6%	81.2%	89.7%
N/A*	48.6%	51.1%	73.2%	79.8%
Household location				
Urban	64.9%	64.2%	84.9%	90.0%
Suburban	64.4%	62.5%	86.8%	89.3%
Rural	62.8%	67.6%	85.2%	90.4%
Total	64.5%	64.6%	85.1%	90.0%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20854

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TV Viewers in Poland, by Method, H1 2020

% of internet users

Broadcast live on TV channel



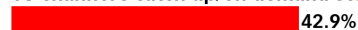
SVOD*



Recorded from TV



TV channel's catch-up/on-demand service



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20856

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Poland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	85.7%	85.1%
Male	85.0%	84.5%
Age		
16-24	94.9%	93.5%
25-34	90.6%	93.5%
35-44	86.0%	86.4%
45-54	76.1%	77.6%
55-64	72.6%	65.1%
Annual household income group		
High	87.2%	87.1%
Medium	85.5%	87.9%
Low	85.3%	83.0%
N/A*	79.9%	75.7%
Household location		
Urban	84.9%	85.3%
Suburban	89.2%	87.9%
Rural	85.0%	80.9%
Total	85.4%	84.8%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20857

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Social Media Users in Poland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	83.5%	87.0%
Male	82.3%	83.0%
Age		
16-24	85.7%	87.3%
25-34	86.5%	87.7%
35-44	85.3%	88.6%
45-54	78.5%	80.1%
55-64	73.9%	77.5%
Annual household income group		
High	83.5%	86.4%
Medium	85.2%	85.8%
Low	81.8%	84.9%
N/A*	79.0%	79.1%
Household location		
Urban	82.1%	84.6%
Suburban	85.8%	89.3%
Rural	84.2%	84.0%
Total	82.9%	85.0%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, nk.pl, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20853

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Digital Audio Listeners in Poland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	57.4%	61.6%
Male	62.7%	64.2%
Age		
16-24	83.6%	86.9%
25-34	68.2%	73.0%
35-44	58.7%	61.0%
45-54	44.1%	49.3%
55-64	34.0%	33.6%
Annual household income group		
High	61.1%	62.7%
Medium	60.0%	66.2%
Low	62.1%	62.1%
N/A*	49.3%	56.3%
Household location		
Urban	58.4%	64.1%
Suburban	72.2%	65.1%
Rural	59.4%	55.9%
Total	60.1%	62.9%

Note: services include Amazon Music Unlimited, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20849

www.eMarketer.com

Voice Search Users in Poland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	21.5%	20.3%
Male	27.8%	28.8%
Age		
16-24	34.3%	36.8%
25-34	29.9%	28.3%
35-44	22.9%	25.0%
45-54	19.2%	19.6%
55-64	12.1%	10.2%
Annual household income group		
High	26.8%	24.5%
Medium	25.6%	25.9%
Low	23.9%	24.5%
N/A*	18.6%	21.4%
Household location		
Urban	25.1%	25.0%
Suburban	27.3%	26.7%
Rural	20.8%	21.4%
Total	24.6%	24.6%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20858

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KEY FEATURES

While digital behaviors are gaining ground, traditional media formats have proven to be resilient.

- Several traditional media habits are still nearly universal in Portugal. The share of internet users ages 16 to 64 who watched live TV in the month prior to polling rose between H1 2019 and H1 2020 to 94.2%, according to GlobalWebIndex. Additionally, more than 87% of respondents had listened to broadcast radio. Time spent with broadcast TV increased year over year (YoY), averaging 2 hours, 11 minutes (2:11), though time spent with radio dropped by several minutes, to 1:21 per day.
- Print media remained widely popular as well, despite a gradual decline in readership, especially for newspapers. In Q1 2020, print newspaper and magazine penetration reached 58.3% and 59.4%, respectively. Penetration remained higher among older respondents, but the gap between seniors ages 55 to 64 and those in younger age groups was markedly narrower than in 2019. Time spent with print press was no longer greater than time spent with online press; in H1 2020, both were equal at 28 minutes per day.
- A similar pattern was evident among radio listeners. As last year, nine in 10 internet users ages 55 to 64 polled in H1 2020 had listened to live radio in the prior month. But more than 82% of respondents 16 to 34 also tuned in to radio broadcasts. And the 35-to-44 age bracket registered the greatest penetration at 91.7%.
- In Portugal, 83.0% of internet users polled had used social media in the prior month and spent 2:23 per day on social. Only PCs/tablets and smartphones claimed more time on a typical day. (GlobalWebIndex includes YouTube in its social media category, however, so any respondents who use YouTube count as social network users.)

Beyond PCs and smartphones, many digital devices register only meager takeup.

- PC and smartphone ownership rates among internet users in Portugal are now among the highest in Western Europe. This marks a significant improvement compared with a decade ago, when the country was still reeling from the effects of the 2008-2009 global economic crisis. In H1 2020, more than 97% of survey respondents owned a smartphone, and 85.8% owned a desktop or laptop. Additionally, 52.1% of internet users were tablet owners.
- Internet users spent an average of 3:12 per day with mobile phones in H1 2020, up from 2:54 last year. PCs and tablets accounted for 3:56 per day, almost unchanged YoY.
- This year's survey results also point to pent-up demand for some newer digital devices. In particular, the share of internet users who owned a smart TV rose by 5 percentage points to 43.4% in H1 2020.
- On the other hand, takeup of both smartwatches and smart wristbands stalled below 13%. Just 11.6% of respondents owned a TV streaming stick or similar device this year. The share owning a smart home product rose from 3.6% to 4.3%.

Growing interest in smart TVs reflects a modest rise in digital video consumption.

- More than 94% of internet users polled in Portugal had watched live TV during the prior month in H1 2020. Yet only 41.2% had watched TV shows via a broadcaster's catch-up service—a decline of 3 percentage points since 2019, but an option used by 63.2% in France and 68.7% in Spain, for example. In Portugal, it was still more common to record a show at the time of broadcast for later viewing (65.7%).
- As those figures suggest, Portugal's digital video landscape remains less developed than many others in Western Europe. Just 62.7% of internet users in the country had streamed video content in the prior month. Predictably, engagement was higher in younger cohorts and affluent homes. Similarly, the average time spent daily with online TV and video was lower than in most neighboring countries, at 39 minutes, and showed no YoY increase.

- Engagement with paid-for video content, such as the subscription video-on-demand (SVOD) offerings of Netflix and other providers, was also lower than the Western European norm. That said, the share of internet users in Portugal who watched SVOD in the month prior to polling jumped from 44.5% to 51.4%. Again, youth and affluence were the key correlates for SVOD viewing.
- Usage of digital audio content, including music and podcasts, climbed substantially from 2019 to 60.6% of internet users in H1 2020. In the youngest age group, that share was just under 85%.

Device Ownership in Portugal, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	96.1%	97.2%
Desktop/laptop	84.7%	85.8%
Tablet	53.0%	52.1%
Smart TV	38.4%	43.4%
Game console	32.5%	34.5%
Smartwatch	11.3%	12.9%
Smart wristband	8.2%	12.9%
TV streaming stick/device	11.1%	11.6%
Feature phone	7.5%	6.8%
Smart home device	3.6%	4.3%
VR headset/device	3.6%	2.8%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20564

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Smartphone and Tablet Owners in Portugal, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	95.9%	96.8%	52.6%	52.3%
Male	96.3%	97.6%	53.5%	51.8%
Age				
16-24	98.9%	98.9%	44.2%	39.5%
25-34	97.2%	97.3%	51.9%	47.5%
35-44	97.9%	98.1%	57.3%	59.1%
45-54	95.7%	96.5%	57.2%	54.0%
55-64	88.0%	94.5%	52.0%	58.9%
Annual household income group				
High	97.3%	97.8%	63.0%	65.2%
Medium	96.7%	98.4%	55.8%	54.3%
Low	96.1%	95.8%	43.2%	44.1%
N/A*	92.9%	96.3%	47.8%	39.6%
Household location				
Urban	95.8%	97.6%	52.9%	52.2%
Suburban	97.3%	97.5%	55.6%	52.8%
Rural	96.0%	95.4%	49.7%	50.2%
Total	96.1%	97.2%	53.0%	52.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20863

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Smart TV Owners in Portugal, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	35.7%	40.6%
Male	41.2%	46.3%
Age		
16-24	38.2%	41.1%
25-34	38.5%	43.7%
35-44	37.7%	43.4%
45-54	37.5%	45.4%
55-64	41.2%	42.6%
Annual household income group		
High	51.3%	55.7%
Medium	38.4%	44.8%
Low	30.4%	34.6%
N/A*	29.7%	36.5%
Household location		
Urban	39.6%	43.6%
Suburban	39.1%	46.8%
Rural	31.5%	37.0%
Total	38.4%	43.4%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20862

www.eMarketer.com

Average Time Spent with Media in Portugal, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Social networking



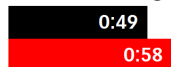
Broadcast TV



Broadcast radio



Music streaming



Online TV/streaming



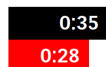
Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20859

www.eMarketer.com

Traditional Media Users in Portugal, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Magazine readers



Newspaper readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20866

www.eMarketer.com

Traditional Media Users in Portugal, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	56.5%	49.7%	88.6%	96.0%
Male	62.4%	67.3%	86.1%	92.8%
Age				
16-24	42.8%	47.4%	82.1%	89.9%
25-34	51.2%	45.5%	82.7%	90.7%
35-44	60.1%	59.6%	91.7%	97.0%
45-54	69.7%	68.2%	89.0%	95.2%
55-64	76.0%	73.5%	90.3%	100.0%
Annual household income group				
High	63.6%	65.6%	92.3%	95.2%
Medium	63.2%	57.2%	89.9%	98.5%
Low	55.9%	57.1%	83.6%	90.3%
N/A*	49.1%	49.0%	79.5%	91.7%
Household location				
Urban	62.3%	59.9%	86.0%	94.7%
Suburban	56.3%	60.0%	90.5%	96.0%
Rural	51.8%	47.7%	87.8%	90.5%
Total	59.4%	58.3%	87.4%	94.5%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20865

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TV Viewers in Portugal, by Method, H1 2020

% of internet users

Broadcast live on TV channel

94.2%

Recorded from TV

65.7%

SVOD*

51.4%

TV channel's catch-up/on-demand service

41.2%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20867

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Portugal, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	57.4%	58.1%
Male	61.0%	67.5%
Age		
16-24	74.7%	78.5%
25-34	65.6%	69.9%
35-44	55.2%	63.0%
45-54	52.7%	51.0%
55-64	45.9%	48.9%
Annual household income group		
High	68.7%	67.9%
Medium	62.0%	64.6%
Low	52.0%	58.2%
N/A*	49.5%	57.5%
Household location		
Urban	60.3%	65.5%
Suburban	57.6%	60.7%
Rural	56.5%	54.6%
Total	59.2%	62.7%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20868

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Social Media Users in Portugal, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	84.3%	83.7%
Male	82.7%	82.3%
Age		
16-24	87.3%	90.2%
25-34	83.1%	79.0%
35-44	82.0%	83.3%
45-54	85.2%	80.7%
55-64	79.6%	82.8%
Annual household income group		
High	82.6%	81.6%
Medium	84.3%	83.2%
Low	83.8%	82.6%
N/A*	83.4%	86.1%
Household location		
Urban	83.3%	83.2%
Suburban	84.8%	82.9%
Rural	83.0%	82.5%
Total	83.5%	83.0%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20864

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Digital Audio Listeners in Portugal, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	48.3%	57.2%
Male	60.8%	64.2%
Age		
16-24	75.1%	84.9%
25-34	66.7%	69.9%
35-44	46.8%	58.5%
45-54	43.2%	45.4%
55-64	39.2%	42.7%
Annual household income group		
High	57.6%	62.4%
Medium	56.8%	61.0%
Low	52.3%	57.5%
N/A*	47.2%	63.0%
Household location		
Urban	56.3%	62.9%
Suburban	51.2%	55.8%
Rural	50.7%	59.7%
Total	54.4%	60.6%

Note: services include Amazon Music Unlimited, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way.";

*don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20860

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Voice Search Users in Portugal, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	15.7%	17.5%
Male	25.7%	25.7%
Age		
16-24	31.4%	38.2%
25-34	23.4%	20.8%
35-44	20.5%	19.9%
45-54	17.5%	17.4%
55-64	8.0%	10.3%
Annual household income group		
High	23.9%	25.6%
Medium	18.1%	21.0%
Low	21.1%	20.7%
N/A*	18.0%	17.5%
Household location		
Urban	22.2%	22.3%
Suburban	15.6%	20.5%
Rural	20.1%	20.2%
Total	20.5%	21.5%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20869

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ROMANIA

KEY FEATURES

Internet users in Romania spent 4 hours daily on PCs and tablets in H1 2020—but that figure fell from last year, as mobile time has increased.

- Some 96.3% of internet users in Romania ages 16 to 64 owned a smartphone in H1 2020, according to GlobalWebIndex. Penetration was greatest among respondents in affluent homes and lowest among those ages 55 to 64—but these variations were minor.
 - Ownership of desktop and laptop PCs was also high, at 86.8%. Tablets had suffered some attrition, however; 41.1% of internet users owned one in H1 2020, compared with 45.2% in H1 2019. Tablet ownership fell most dramatically among the youngest respondents (ages 16 to 24).
 - PCs and tablets captured the largest single slice of internet users' media time, at an average 4 hours (4:00) daily in H1 2020, compared with 4:20 in H1 2019. Mobile devices accounted for 3:36—15 minutes more than last year.
 - Social networking contributes hugely to time spent on both small- and large-screen devices. Some 89.1% of respondents in Romania had visited social platforms in the month prior to polling in 2020, spending 2:21 per day, on average.
- Print readership registered a steep decline.**
- As digital engagement rises in Romania, the reach of print media is shrinking fast. In Q1 2019, over half of internet users had read a print newspaper in the prior month; a similar number had read a print magazine. In Q1 2020, the share reading printed news plunged by 10.3 percentage points, to 41.7%. Magazine penetration fell by 7 percentage points, to 46.3%, according to GlobalWebIndex and Publicis Media.
 - In H1 2019, print had already fallen behind online press in terms of time spent, at 32 minutes and 59 minutes daily, respectively. This year, respondents devoted less time to both print and online publications, but print registered the more substantial fall, to 23 minutes per day.



- Broadcast radio is also occupying less of internet users' time but has kept its audience. Nearly 79% of males polled in Q1 2020 and 74.4% of females had listened to live radio in the previous month. Those programs claimed 1:16 daily.

Live TV seems to be holding its own, but video streaming and paid-for video services made significant gains from last year.

- Some 91.5% of internet users in Romania said they'd watched live TV in the month prior to the H1 2020 survey. Even viewership among the youngest segment (ages 16 to 24) reached over 84%. Time spent with broadcast TV averaged a robust 2:29 daily, a 6-minute decrease since H1 2019.
- Engagement with time-shifted TV options was even more limited in Romania than in most European countries in H1 2020. Just 31.4% of respondents had used TV channels' catch-up or on-demand services in the prior month, while 32.3% had recorded TV broadcasts to watch later.
- Internet users' attention is clearly turning to other types of video consumption; more than 81% had streamed video content in the prior month, consuming 56 minutes each day, on average. Among internet users ages 16 to 24, 92.6% were video streamers. Affluent respondents also overindexed for this behavior.
- Subscription video-on-demand (SVOD) services like Netflix similarly posted a major gain in viewers, as overall penetration rose from 52.3% last year to 60.5% in H1 2020. Early-adopter groups remain at the forefront of SVOD; penetration rates were far greater among internet users ages 16 to 24 and 25 to 34, at 79.5% and 70.6%, respectively, and reached 69.5% in more affluent homes.
- Smart TVs saw a similar jump, as ownership in Romania rose from 51.0% in H1 2019 to 56.3% in H1 2020—surpassing the level in Poland, for example.
- By comparison, smartwatches posted only modest takeup, owned by 14.9% of the online population in 2020. Penetration was appreciably higher among males (18.5%), respondents 35 to 44 (19.6%), and those in affluent households (20.9%). Fewer than 10% of those polled owned a smart wristband.

- Smart home devices have met even stronger headwinds and are clearly not a priority for many internet users in Romania. As of H1 2020, just 7.9% of survey respondents owned such a device. Ownership still correlated directly with affluence, but even in high-income households, fewer than 10% owned a smart home item.

Device Ownership in Romania, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	95.4%	96.3%
Desktop/laptop	87.0%	86.8%
Smart TV	51.0%	56.3%
Tablet	45.2%	41.1%
Game console	16.8%	16.2%
Smartwatch	12.2%	14.9%
Feature phone	12.4%	10.1%
Smart wristband	6.5%	9.5%
TV streaming stick/device	8.6%	8.9%
Smart home device	7.1%	7.9%
VR headset/device	2.6%	2.2%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20565

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Smartphone and Tablet Owners in Romania, H1 2019 & H1 2020 % of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	95.7%	96.2%	47.9%	40.6%
Male	95.2%	96.5%	42.7%	41.6%
Age				
16-24	95.5%	98.3%	39.5%	31.3%
25-34	96.2%	95.6%	42.9%	37.2%
35-44	96.4%	97.7%	46.7%	46.0%
45-54	95.9%	95.5%	52.2%	46.8%
55-64	91.8%	93.9%	45.1%	44.5%
Annual household income group				
High	97.5%	98.1%	52.7%	53.0%
Medium	95.8%	96.6%	47.7%	41.8%
Low	93.4%	94.7%	36.9%	35.7%
N/A*	94.0%	95.2%	38.8%	24.8%
Household location				
Urban	96.2%	96.2%	46.8%	42.5%
Suburban**	-	-	-	-
Rural	92.2%	96.9%	41.5%	36.0%
Total	95.4%	96.3%	45.2%	41.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20874

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Smart TV Owners in Romania, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	51.6%	55.7%
Male	50.3%	56.8%
Age		
16-24	46.7%	47.0%
25-34	47.3%	52.5%
35-44	50.9%	61.9%
45-54	57.4%	61.4%
55-64	54.8%	58.4%
Annual household income group		
High	60.7%	70.1%
Medium	56.1%	58.6%
Low	37.8%	43.6%
N/A*	42.9%	45.7%
Household location		
Urban	53.1%	57.0%
Suburban**	-	-
Rural	43.7%	53.1%
Total	51.0%	56.3%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20873

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Average Time Spent with Media in Romania, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



Broadcast radio



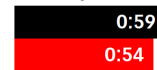
Music streaming



Online TV/streaming



Online press



Gaming



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20870

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Traditional Media Users in Romania, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Magazine readers



Newspaper readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20877

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Traditional Media Users in Romania, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	45.5%	39.7%	74.4%	95.2%
Male	47.1%	43.5%	78.8%	89.9%
Age				
16-24	34.3%	25.5%	63.8%	86.0%
25-34	51.0%	43.1%	77.7%	90.4%
35-44	42.9%	43.8%	78.0%	96.1%
45-54	56.9%	50.2%	84.5%	95.4%
55-64	46.4%	45.7%	79.3%	94.3%
Annual household income group				
High	53.0%	49.1%	85.3%	95.7%
Medium	44.4%	39.9%	76.8%	95.0%
Low	46.2%	41.9%	73.6%	89.6%
N/A*	35.7%	28.1%	61.3%	83.1%
Household location				
Urban	45.9%	45.1%	76.4%	92.2%
Suburban**	-	-	-	-
Rural	46.2%	27.7%	77.0%	93.7%
Total	46.3%	41.7%	76.7%	92.5%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20876

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TV Viewers in Romania, by Method, H1 2020

% of internet users

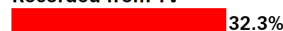
Broadcast live on TV channel



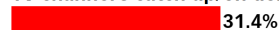
SVOD*



Recorded from TV



TV channel's catch-up/on-demand service



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20878

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Video-on-Demand (VOD) Viewers in Romania, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	73.9%	78.0%
Male	81.1%	84.7%
Age		
16-24	90.1%	92.6%
25-34	82.1%	83.1%
35-44	68.9%	80.1%
45-54	75.1%	78.4%
55-64	70.4%	70.7%
Annual household income group		
High	82.4%	85.9%
Medium	78.4%	83.1%
Low	77.5%	76.2%
N/A*	59.7%	73.9%
Household location		
Urban	78.4%	81.2%
Suburban**	-	-
Rural	77.4%	83.1%
Total	77.5%	81.5%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20879

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Social Media Users in Romania, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	89.2%	88.7%
Male	88.2%	89.4%
Age		
16-24	89.8%	88.9%
25-34	89.8%	86.4%
35-44	87.6%	89.6%
45-54	89.2%	89.7%
55-64	86.7%	91.6%
Annual household income group		
High	91.1%	90.3%
Medium	88.4%	90.8%
Low	88.7%	87.0%
N/A*	83.7%	85.8%
Household location		
Urban	88.7%	88.7%
Suburban**	-	-
Rural	88.8%	89.7%
Total	88.7%	89.1%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20875

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Digital Audio Listeners in Romania, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	51.3%	69.7%
Male	63.3%	67.4%
Age		
16-24	88.3%	82.0%
25-34	60.3%	73.5%
35-44	48.6%	65.7%
45-54	42.9%	58.7%
55-64	44.1%	61.0%
Annual household income group		
High	60.9%	65.4%
Medium	54.5%	68.1%
Low	59.5%	73.7%
N/A*	51.4%	62.5%
Household location		
Urban	55.9%	67.6%
Suburban**	-	-
Rural	63.8%	71.5%
Total	57.4%	68.6%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20871

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Voice Search Users in Romania, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	21.2%	18.8%
Male	33.1%	29.0%
Age		
16-24	43.2%	40.6%
25-34	36.7%	31.5%
35-44	24.4%	22.8%
45-54	15.8%	13.1%
55-64	13.7%	8.3%
Annual household income group		
High	27.4%	22.6%
Medium	26.1%	22.0%
Low	30.8%	31.1%
N/A*	24.4%	19.4%
Household location		
Urban	26.5%	24.6%
Suburban**	-	-
Rural	31.5%	22.8%
Total	27.5%	24.1%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20880

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KEY FEATURES

Print media faces a steep decline in Russia, but traditional radio audiences have proven more loyal.

- Last year, Russia recorded low print readership rates, according to GlobalWebIndex/Publicis Media, and those values continue to slide dramatically. Just 37.1% of internet users ages 16 to 64 had read a print newspaper in the month prior to polling in Q1 2020, and 35.0% had read a print magazine. Penetration of both was higher among respondents ages 35 and older and in affluent homes.
- Overall, internet users in Russia spent an average of 36 minutes daily reading online press in H1 2020—more than double the 15 minutes spent each day with print press titles. The disparity between digital and print press continues to be among the starkest seen in any country surveyed.
- Penetration of broadcast radio fell by just 1 percentage point year over year (YoY); for the first time, fewer than 60% of internet users had listened to live radio in the prior month.

There were few major shifts in Russia's device landscape, though tablets may be falling out of favor.

- In H1 2019, smartphones were already more widespread in Russia than PCs, and that was accentuated in H1 2020. Nearly 95% of internet users owned a smartphone, while 87.4% were PC owners.
- Tablets weren't a major presence in Russia until last year, but that share fell in H1 2020 to 37.8%. Ownership did rise marginally in high-income households, but increasingly, internet users may feel they just don't need a tablet, as current smartphones typically provide better functionality in a more conveniently portable form.

- Penetration of smart TVs and feature phones hardly shifted during the past year. In H1 2020, 31.1% of internet users had a smart TV, while 23.1% still owned a feature phone. That said, nearly 42% of respondents in more affluent homes possessed a smart TV.
- Meanwhile, many other digital devices have made little impact in Russia—possibly due to cost considerations. Ownership of smartwatches and TV streaming sticks remained below 8% this year, though 12.8% of respondents had a smart wristband. As in H1 2019, barely 10% owned a game console. And just 2.9% said they owned a smart home device, such as a home energy consumption monitor that could be managed via a mobile app. That share too was unchanged since 2019.

Time spent may be a more revealing measure of current media habits.

- In H1 2020, internet users in Russia clocked up an average 3 hours, 18 minutes (0:18) per day with their mobile phones. Desktops, laptops, and tablets still claimed nearly an hour more at 4:09 daily, but mobile time is growing as PC time shrinks.
- Since 2018, social media has enjoyed greater reach than broadcast TV, according to GlobalWebIndex. In H1 2020, that gap has widened further: More than 90% of those polled had used social sites or apps in the month prior to polling, compared with 80.5% who had watched live TV, and 84.9% who had watched TV shows via any method. However, social networking no longer occupied more time. Respondents estimated that each activity consumed 2:19 per day. (GlobalWebIndex does include YouTube among its social networks, which tends to raise the figures for social media reach and time spent.)
- Time spent figures may also tell us something about the video-on-demand (VOD) market in Russia. Average VOD time climbed from 44 minutes to 51 minutes YoY. Yet, the share of internet users who had streamed video content in the prior month dropped from 77.8% to 71.6%. It's quite likely that some respondents have become more committed to online video viewing, while others have simply concluded it's not for them.

- Interestingly, takeup of subscription VOD (SVOD) services, such as Netflix and Now.ru, remains extremely modest by global standards at just 28.5% in H1 2020. Younger people look set to be the key to short-term growth; among 16-to-24-year-olds, almost half had watched SVOD content in the previous month.
- By contrast, Russia's digital audio audience has exploded, from 37.8% to 56.3% YoY. However, time spent with music streaming specifically remained relatively unchanged at 44 minutes per day on average.

Device Ownership in Russia, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	92.8%	94.6%
Desktop/laptop	89.0%	87.4%
Tablet	41.6%	37.8%
Smart TV	30.9%	31.1%
Feature phone	23.5%	23.1%
Smart wristband	5.6%	12.8%
Game console	10.7%	10.7%
Smartwatch	7.1%	7.5%
TV streaming stick/device	6.3%	6.3%
Smart home device	2.9%	2.9%
VR headset/device	1.1%	1.1%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20566

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Smartphone and Tablet Owners in Russia, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	93.5%	95.5%	39.8%	37.9%
Male	92.1%	93.8%	43.5%	37.7%
Age				
16-24	97.4%	97.7%	34.0%	31.8%
25-34	96.1%	96.9%	41.9%	36.0%
35-44	94.5%	95.6%	48.1%	43.2%
45-54	89.3%	94.0%	41.9%	39.2%
55-64	82.4%	87.0%	41.0%	38.0%
Annual household income group				
High	96.4%	98.5%	52.8%	53.2%
Medium	91.9%	95.7%	42.6%	36.3%
Low	90.9%	91.4%	35.4%	30.4%
N/A*	93.0%	92.6%	33.6%	29.1%
Household location				
Urban	93.6%	95.2%	42.3%	39.4%
Suburban**	-	-	-	-
Rural**	-	-	-	-
Total	92.8%	94.6%	41.6%	37.8%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20885

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Smart TV Owners in Russia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	25.9%	27.0%
Male	36.2%	35.3%
Age		
16-24	22.5%	24.2%
25-34	30.9%	31.5%
35-44	34.4%	32.9%
45-54	35.3%	34.6%
55-64	31.0%	30.8%
Annual household income group		
High	43.3%	41.7%
Medium	31.5%	31.5%
Low	24.3%	24.8%
N/A*	22.8%	24.7%
Household location		
Urban	32.0%	32.3%
Suburban**	-	-
Rural**	-	-
Total	30.9%	31.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20884

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Average Time Spent with Media in Russia, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



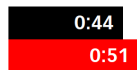
Social networking



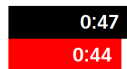
Broadcast TV



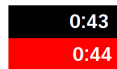
Online TV/streaming



Broadcast radio



Music streaming



Online press



Gaming



Print



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20881

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Traditional Media Users in Russia, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019 ■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20888

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Traditional Media Users in Russia, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	37.1%	36.4%	55.4%	87.2%
Male	32.8%	37.8%	62.9%	82.6%
Age				
16-24	25.1%	26.8%	46.6%	73.5%
25-34	30.9%	33.2%	60.7%	81.9%
35-44	36.8%	39.6%	66.8%	87.3%
45-54	40.4%	42.7%	61.4%	90.6%
55-64	43.5%	44.7%	56.4%	91.9%
Annual household income group				
High	40.8%	42.3%	71.7%	90.0%
Medium	33.6%	35.8%	59.3%	84.1%
Low	33.6%	34.1%	52.3%	82.4%
N/A*	30.3%	37.9%	51.6%	83.2%
Household location				
Urban	35.2%	36.3%	59.6%	85.0%
Suburban**	-	-	-	-
Rural**	-	-	-	-
Total	35.0%	37.1%	59.1%	84.9%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20887

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TV Viewers in Russia, by Method, H1 2020

% of internet users

Broadcast live on TV channel

80.5%

Recorded from TV

51.3%

SVOD*

28.5%

TV channel's catch-up/on-demand service

24.5%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20889

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Video-on-Demand (VOD) Viewers in Russia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	79.5%	72.4%
Male	76.0%	70.8%
Age		
16-24	89.0%	82.8%
25-34	81.7%	75.3%
35-44	74.7%	68.8%
45-54	71.7%	69.9%
55-64	67.8%	59.3%
Annual household income group		
High	78.5%	75.2%
Medium	76.7%	74.3%
Low	78.4%	71.0%
N/A*	77.1%	58.6%
Household location		
Urban	77.4%	71.5%
Suburban**	-	-
Rural**	-	-
Total	77.8%	71.6%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20890

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Social Media Users in Russia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	91.1%	92.0%
Male	87.6%	88.4%
Age		
16-24	90.7%	90.9%
25-34	90.5%	91.0%
35-44	89.6%	89.2%
45-54	87.9%	90.2%
55-64	87.1%	89.6%
Annual household income group		
High	89.7%	93.7%
Medium	91.2%	91.7%
Low	88.6%	88.1%
N/A*	86.6%	84.8%
Household location		
Urban	89.2%	90.1%
Suburban**	-	-
Rural**	-	-
Total	89.4%	90.2%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, Pinterest, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, VK, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20886

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Digital Audio Listeners in Russia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	38.2%	56.4%
Male	37.4%	56.3%
Age		
16-24	49.5%	72.4%
25-34	40.1%	61.4%
35-44	35.1%	52.2%
45-54	30.3%	50.7%
55-64	31.6%	43.3%
Annual household income group		
High	41.0%	61.9%
Medium	37.1%	58.9%
Low	37.7%	52.8%
N/A*	32.0%	47.2%
Household location		
Urban	37.6%	56.9%
Suburban**	-	-
Rural**	-	-
Total	37.8%	56.3%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20882

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Voice Search Users in Russia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	24.7%	24.0%
Male	26.7%	25.8%
Age		
16-24	33.1%	34.9%
25-34	27.2%	27.4%
35-44	23.3%	21.8%
45-54	22.1%	22.9%
55-64	16.7%	21.1%
Annual household income group		
High	27.7%	30.6%
Medium	24.8%	25.6%
Low	26.2%	23.1%
N/A*	21.4%	16.5%
Household location		
Urban	25.6%	25.2%
Suburban**	-	-
Rural**	-	-
Total	25.6%	24.9%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20891

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SAUDI ARABIA

KEY FEATURES

Smartphones rule the device hierarchy in Saudi Arabia. PCs and smart TVs rank second and third.

- Smartphone penetration among internet users in Saudi Arabia ages 16 to 64 approached 99% in H1 2019 and was essentially the same (98.7%) this year, according to GlobalWebIndex.
- Ownership of desktops and laptops increased to 61.1% in H1 2020. City dwellers were more likely to have a PC than respondents living in suburban areas. Nearly 73% of affluent internet users owned a PC, as well.
- Similarly, tablet penetration was notably greater among web users in high-income households (44.9%) compared with the national average (34.1%). Females and older internet users were more likely to own a tablet, too.
- While tablet ownership saw few changes between H1 2019 and H1 2020, more internet users had invested in smart TVs, lifting penetration to 36.1%.
- Smartwatches had also gained fans since last year, and 18.4% of internet users polled in H1 2020 owned such a device. Among 25- to 34-year-olds and affluents, that share was nearly a quarter.
- By contrast, smart home devices are struggling to convince internet users of their usefulness or value for money. Just more than 5% of respondents owned a smart home product this year—compared with 7.4% in H1 2019.

Digital activities dominate media time for most internet users, and by a large margin.

- Time spent with mobile devices continues to outpace all other categories, GlobalWebIndex reported. Mobile activities consumed an average of 4 hours, 27 minutes (4:27) per day in H1 2020, followed by 3:33 spent with PCs and tablets, for example.



- Social platforms appeared even more popular than in H1 2019, with penetration climbing from 87.8% to 90.4% of internet users. Social media also ranked third in terms of time spent, accounting for 3:14 daily, on average. This is no surprise, given the amount of social networking that takes place on mobile. It's also relevant that GlobalWebIndex includes YouTube in its list of social media platforms; that likely increases penetration and time spent with the medium.
- Traditional TV reached a greater proportion of Saudi Arabia's internet users in H1 2020; some 88.6% of those surveyed had watched live TV in the prior month, spending 1:57 per day. But broadcast TV viewing is increasingly concentrated in the upper half of the age spectrum. More than 90% of respondents ages 35 and older had watched TV shows in the prior month, compared with 76.3% of respondents ages 16 to 24.
- Moreover, the share of internet users who watch digital video is fast approaching the share of live TV viewers at 87.3%. In fact, video streaming time spent has already overtaken broadcast TV at 2:03, per GlobalWebIndex.
- Similarly, time devoted to online press surpassed time spent with print publications. Internet users polled in H1 2020 spent an average 51 minutes each day with print newspapers and magazines but 1:32 daily reading online press.
- The audio picture is more complex. Broadcast radio continues to do well in Saudi Arabia. The share of internet users tuning in to live radio programming in the previous month rose from 51.5% in Q1 2019 to 55.8% in Q1 2020, per GlobalWebIndex/Publicis Media. Yet digital audio is on the rise as well. Some 81.2% of respondents polled this year had streamed music or accessed podcasts or other audio content from digital sources in the month prior. And the time spent with broadcast radio—an average of 45 minutes per day—was less than half the 1:34 devoted daily to music streaming alone.

Device Ownership in Saudi Arabia, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	98.9%	98.7%
Desktop/laptop	55.1%	61.1%
Smart TV	32.9%	36.1%
Tablet	32.7%	34.1%
Game console	19.1%	20.1%
Smartwatch	14.5%	18.4%
Feature phone	12.1%	10.9%
Smart wristband	9.4%	10.8%
TV streaming stick/device	7.7%	6.7%
VR headset/device	5.8%	6.1%
Smart home device	7.4%	5.7%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20567

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Smartphone and Tablet Owners in Saudi Arabia, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	99.0%	98.8%	36.1%	40.9%
Male	98.8%	98.6%	30.2%	29.1%
Age				
16-24	98.9%	98.7%	27.1%	28.8%
25-34	99.0%	98.8%	33.3%	35.3%
35-44	98.7%	99.1%	33.5%	34.1%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	99.5%	98.8%	44.3%	44.9%
Medium	99.0%	98.9%	37.3%	38.1%
Low	98.9%	98.4%	18.4%	28.5%
N/A**	97.8%	98.6%	26.6%	22.5%
Household location				
Urban	99.0%	98.7%	36.3%	36.9%
Suburban	98.8%	98.3%	25.5%	29.9%
Rural*	-	-	-	-
Total	98.9%	98.7%	32.7%	34.1%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20896

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Smart TV Owners in Saudi Arabia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	32.8%	36.8%
Male	33.0%	35.6%
Age		
16-24	25.6%	27.1%
25-34	36.2%	36.6%
35-44	33.7%	39.2%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	47.0%	46.1%
Medium	35.6%	41.6%
Low	20.3%	31.4%
N/A**	23.4%	22.3%
Household location		
Urban	35.9%	38.9%
Suburban	28.8%	30.3%
Rural*	-	-
Total	32.9%	36.1%

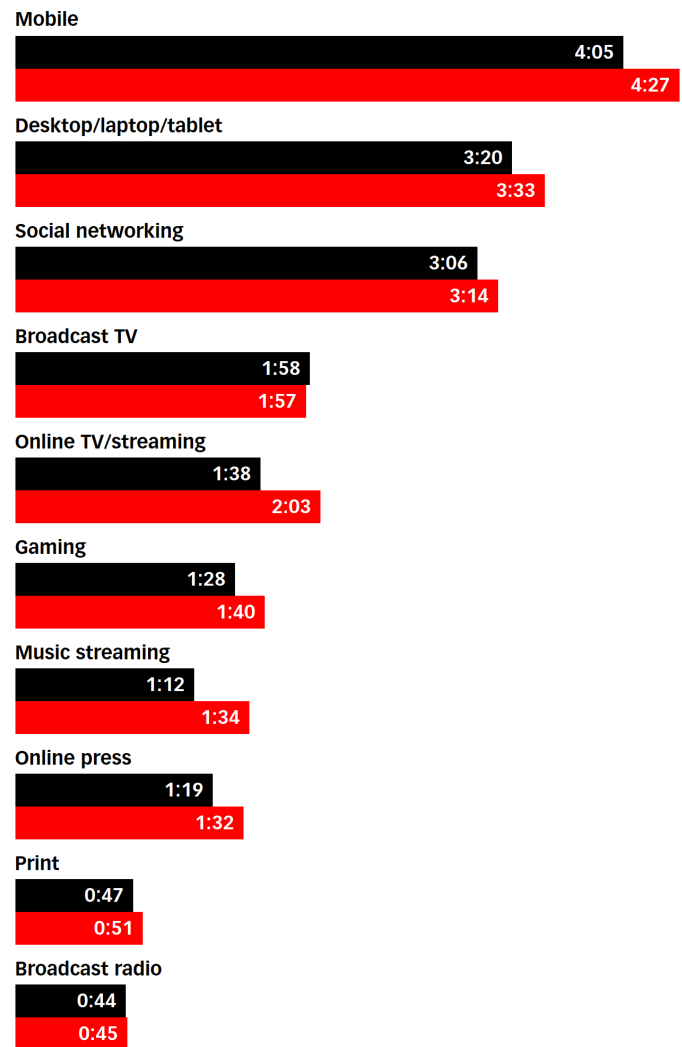
Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20895

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Average Time Spent with Media in Saudi Arabia, H1 2019 & H1 2020

hrs:mins per day among internet users



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20892

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Traditional Media Users in Saudi Arabia, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20899

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Traditional Media Users in Saudi Arabia, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	47.9%	49.0%	56.4%	86.5%
Male	45.6%	46.7%	55.4%	85.1%
Age				
16-24	27.9%	27.7%	40.7%	76.3%
25-34	50.4%	53.8%	59.7%	84.1%
35-44	56.9%	58.0%	64.2%	90.1%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	51.3%	52.2%	65.7%	92.2%
Medium	48.8%	50.4%	57.3%	86.4%
Low	48.0%	45.0%	52.3%	77.8%
N/A**	31.1%	36.7%	37.4%	81.3%
Household location				
Urban	47.9%	49.3%	56.3%	85.2%
Suburban	40.7%	40.9%	52.4%	92.9%
Rural*	-	-	-	-
Total	46.6%	47.7%	55.8%	85.7%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20898

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TV Viewers in Saudi Arabia, by Method, H1 2020

% of internet users

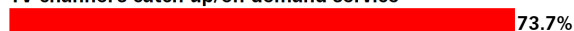
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20900

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Video-on-Demand (VOD) Viewers in Saudi Arabia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	83.9%	90.3%
Male	87.3%	85.2%
Age		
16-24	90.7%	85.2%
25-34	91.9%	92.7%
35-44	81.4%	91.7%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	92.7%	90.1%
Medium	80.4%	88.3%
Low	88.9%	86.9%
N/A**	78.1%	80.2%
Household location		
Urban	85.7%	87.6%
Suburban	88.1%	86.2%
Rural*	-	-
Total	85.9%	87.3%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20901

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Social Media Users in Saudi Arabia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	87.9%	91.7%
Male	87.8%	89.4%
Age		
16-24	89.0%	90.4%
25-34	89.4%	90.4%
35-44	88.2%	92.2%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	88.7%	89.6%
Medium	86.4%	89.1%
Low	91.3%	92.6%
N/A**	84.5%	89.7%
Household location		
Urban	87.1%	90.2%
Suburban	91.2%	91.8%
Rural*	-	-
Total	87.8%	90.4%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20897

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Digital Audio Listeners in Saudi Arabia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	72.5%	85.9%
Male	79.4%	77.7%
Age		
16-24	82.7%	83.1%
25-34	83.8%	90.6%
35-44	74.2%	79.4%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	81.8%	88.1%
Medium	72.9%	84.4%
Low	76.6%	77.4%
N/A**	68.4%	65.8%
Household location		
Urban	76.3%	80.1%
Suburban	77.0%	87.1%
Rural*	-	-
Total	76.5%	81.2%

Note: services include Anghami, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20893

www.eMarketer.com

Voice Search Users in Saudi Arabia, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	40.6%	42.8%
Male	44.0%	49.3%
Age		
16-24	48.9%	48.4%
25-34	45.9%	54.4%
35-44	37.2%	43.3%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	48.9%	52.5%
Medium	42.1%	47.5%
Low	39.6%	49.8%
N/A**	32.8%	28.9%
Household location		
Urban	41.9%	47.3%
Suburban	42.6%	43.6%
Rural*	-	-
Total	42.5%	46.6%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20902

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KEY FEATURES

Smartphones continue to dominate the device hierarchy in Singapore, as penetration of PCs and tablets begins to decline.

- Smartphones are the leading digital device by a growing margin. According to GlobalWebIndex, 98.0% of internet users ages 16 to 64 owned an advanced handset in H1 2020—a share effectively unchanged year over year (YoY). By comparison, PC ownership declined from 78.1% to 75.9%.
- Similarly, 44.7% of those polled owned a tablet, compared with 47.2% in H1 2019. Tablets and PCs were found most often in affluent households. But some other patterns of ownership differed: In H1 2020, respondents ages 16 to 24 were most likely to own a PC, while tablets were concentrated among 35- to 64-year-olds.
- Larger-screen devices did occupy more of internet users' time. In H1 2020, respondents estimated that they spent an average 3 hours, 55 minutes (3:55) daily with desktops, laptops, and tablets, and 3:25 with mobile devices.
- Social networking accounted for the third-highest amount of average media time each day—and the highest for any specific activity—at 2:17. Some 88.0% of internet users polled had visited social sites or apps in the prior month. (GlobalWebIndex includes YouTube in its social network category, which tends to raise the level of engagement and time spent with social media overall.)

Subscription video services and digital audio posted significant gains.

- Between H1 2019 and H1 2020, smart TV penetration declined from 46.0% to 44.8%, according to GlobalWebIndex. During the same period, the share of internet users that had watched live TV rose marginally to 78.7%. In addition, 56.6% had viewed TV shows via a broadcaster's catch-up or on-demand service. Overall, 81.7% of respondents had streamed video of some kind during the prior month. As in 2019, that marginally surpassed the share who'd watched live TV.

- Paid-for video saw a more dramatic shift. The number of internet users who had watched subscription video-on-demand (SVOD) services like Netflix rose from 52.5% to 61.4%. Yet online TV and video streaming occupied just 1:09 per day on average compared with 1:37 devoted to broadcast TV.
- Digital audio also reached a larger audience than the previous year. Nearly 69% of internet users surveyed in H1 2020 had accessed music, podcasts, or other audio content via digital platforms in the prior month. Time spent streaming music rose to 1:21 daily on average, from 1:11 last year. As in H1 2019, respondents ages 16 to 24 and 25 to 34 posted response rates well above average for this metric, at 89.5% and 82.4%, respectively.

Apart from smartwatches and smart wristbands, few digital devices have claimed significant market share in Singapore.

- Smartwatches and smart wristbands registered penetration of 16.2% and 16.6%, respectively, in H1 2020. In high-income households, that share was appreciably greater at about 22% of internet users.
- Smart home products, such as video-linked monitors enabling internet users to keep an eye on their property via a mobile app, have also made less progress than might be expected, reaching penetration of just 11.5% this year. Predictably, ownership was more common (16.8%) in affluent households.
- Singapore also continued to post relatively low ownership of game consoles in H1 2020 at 19.7%. As in 2019, males and internet users in urban and affluent households were more likely to own a console. This year, respondents ages 35 to 44 also overindexed for this metric. This may be because some owners who were 34 years old last year have now entered the older age bracket.

Device Ownership in Singapore, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	98.3%	98.0%
Desktop/laptop	78.1%	75.9%
Smart TV	46.0%	44.8%
Tablet	47.2%	44.7%
Game console	20.1%	19.7%
Smart wristband	15.4%	16.6%
Smartwatch	13.9%	16.2%
TV streaming stick/device	15.9%	13.5%
Smart home device	11.2%	11.5%
VR headset/device	4.3%	4.0%
Feature phone	4.6%	3.9%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20568 www.eMarketer.com

Smartphone and Tablet Owners in Singapore, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.5%	97.8%	49.2%	46.2%
Male	98.2%	98.2%	45.2%	43.2%
Age				
16-24	98.3%	98.4%	37.2%	37.4%
25-34	97.1%	97.4%	45.5%	38.1%
35-44	98.6%	98.5%	51.9%	48.8%
45-54	98.6%	98.6%	50.6%	49.8%
55-64	99.0%	97.0%	49.7%	47.9%
Annual household income group				
High	99.1%	97.9%	60.3%	55.7%
Medium	98.9%	98.2%	53.7%	48.6%
Low	97.5%	98.0%	36.4%	36.1%
N/A*	98.0%	98.0%	38.7%	32.0%
Household location				
Urban	98.5%	97.9%	46.3%	44.5%
Suburban	98.2%	98.5%	51.2%	46.6%
Rural**	-	-	-	-
Total	98.3%	98.0%	47.2%	44.7%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20907 www.eMarketer.com

Smart TV Owners in Singapore, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	47.3%	45.0%
Male	44.8%	44.6%
Age		
16-24	38.4%	39.3%
25-34	41.9%	37.8%
35-44	49.7%	50.5%
45-54	48.1%	46.5%
55-64	51.5%	48.5%
Annual household income group		
High	57.6%	51.2%
Medium	48.7%	50.4%
Low	39.4%	37.3%
N/A*	37.2%	34.9%
Household location		
Urban	46.2%	44.4%
Suburban	47.3%	47.9%
Rural**	-	-
Total	46.0%	44.8%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20906 www.eMarketer.com

Average Time Spent with Media in Singapore, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Social networking



Broadcast TV



Music streaming



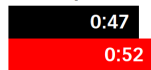
Online TV/streaming



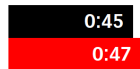
Broadcast radio



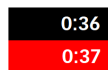
Online press



Gaming



Print



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20903

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Traditional Media Users in Singapore, Q1 2019 & Q1 2020 % of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019 ■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20910

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Traditional Media Users in Singapore, Q1 2020 % of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	46.7%	60.6%	69.0%	86.7%
Male	53.4%	67.6%	67.9%	85.9%
Age				
16-24	36.8%	47.7%	53.9%	85.7%
25-34	43.1%	54.7%	59.2%	82.5%
35-44	51.5%	66.0%	76.8%	85.4%
45-54	55.8%	75.5%	77.9%	85.9%
55-64	62.2%	74.4%	71.4%	92.7%
Annual household income group				
High	59.4%	70.2%	77.2%	90.5%
Medium	53.4%	68.9%	69.0%	88.6%
Low	44.3%	57.4%	63.4%	79.6%
N/A*	22.5%	44.3%	53.2%	85.7%
Household location				
Urban	51.6%	64.5%	66.5%	85.2%
Suburban	46.8%	62.5%	72.4%	88.0%
Rural**	-	-	-	-
Total	50.0%	64.1%	68.5%	86.3%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20909

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TV Viewers in Singapore, by Method, H1 2020

% of internet users

Broadcast live on TV channel

78.7%

SVOD*

61.4%

TV channel's catch-up/on-demand service

56.6%

Recorded from TV

36.4%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20911

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Video-on-Demand (VOD) Viewers in Singapore, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	81.4%	82.0%
Male	80.4%	81.4%
Age		
16-24	87.6%	89.6%
25-34	87.0%	88.4%
35-44	80.8%	82.5%
45-54	76.7%	73.8%
55-64	72.1%	75.2%
Annual household income group		
High	84.5%	83.6%
Medium	83.8%	82.7%
Low	76.8%	79.0%
N/A*	77.0%	80.0%
Household location		
Urban	85.0%	82.9%
Suburban	74.3%	80.2%
Rural**	-	-
Total	80.9%	81.7%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20912

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Social Media Users in Singapore, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	88.8%	88.4%
Male	85.5%	87.6%
Age		
16-24	89.7%	90.7%
25-34	87.8%	90.4%
35-44	86.4%	88.3%
45-54	86.6%	85.0%
55-64	85.4%	86.0%
Annual household income group		
High	87.9%	87.9%
Medium	87.9%	90.0%
Low	86.5%	86.9%
N/A*	86.0%	85.7%
Household location		
Urban	87.3%	88.5%
Suburban	87.6%	88.1%
Rural**	-	-
Total	87.1%	88.0%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20908

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Digital Audio Listeners in Singapore, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	62.2%	65.7%
Male	63.6%	71.7%
Age		
16-24	89.0%	89.5%
25-34	74.9%	82.4%
35-44	57.9%	68.8%
45-54	48.2%	57.5%
55-64	46.3%	46.3%
Annual household income group		
High	66.0%	69.9%
Medium	64.7%	66.8%
Low	59.6%	69.6%
N/A*	60.7%	70.0%
Household location		
Urban	68.3%	72.2%
Suburban	54.6%	63.1%
Rural**	-	-
Total	62.9%	68.7%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20904

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Voice Search Users in Singapore, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	23.6%	25.7%
Male	35.0%	33.7%
Age		
16-24	41.7%	41.2%
25-34	35.4%	35.0%
35-44	32.5%	32.1%
45-54	22.5%	26.0%
55-64	14.9%	16.1%
Annual household income group		
High	33.6%	36.2%
Medium	26.1%	26.2%
Low	29.9%	26.8%
N/A*	24.0%	29.1%
Household location		
Urban	33.4%	34.2%
Suburban	21.1%	22.2%
Rural**	-	-
Total	29.1%	29.6%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20913

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SOUTH AFRICA

KEY FEATURES

PC ownership is rising in this mobile-first country, but the smartphone reigns supreme in penetration and time spent.

- More than 83% of internet users in South Africa ages 16 to 64 owned a desktop or laptop in H1 2020—a more than 7-percentage-point rise year over year (YoY), per GlobalWebIndex. In addition, PC penetration passed 90% among respondents living in higher-income homes.
- While PC ownership advanced by leaps and bounds in recent years, these devices hardly compete with smartphones. Fully 98.9% of survey respondents in South Africa owned a smartphone in H1 2020—up slightly since 2019.
- Unlike PCs and smartphones, tablets were less widespread than last year; the share of internet users who owned one slipped from 46.0% to 42.1%. That said, tablet penetration was notably greater among several audiences favored by advertisers, including those in more affluent homes (56.3%) and adults 35 to 44 (50.3%).
- PCs and tablets did claim more total media time each day than smartphones, according to GlobalWebIndex, though both had risen markedly since H1 2019. Time spent daily with PCs and tablets jumped to 5 hours, 11 minutes (5:11) on average, while smartphone time climbed from 4:10 to 4:46.
- As those figures suggest, mobile phones are now a key access point for many media activities. Social networking is a prime example. The share of internet users who visited social platforms in the prior month rose to 94.2% of those polled in H1 2020, and time spent with social media was also up to 3:31 per day on average.
- Smartphones are also integral to the rising penetration of voice search, via services like Microsoft's Cortana and Apple's Siri. Overall, more than one-third (34.8%) of internet users polled had used a voice assistant or smart speaker in the month prior to polling. Usage was more widespread among males (40.0%) and 16- to 24-year-olds (46.1%), as well as those living in cities and at both ends of the income scale.



For the first time, digital video viewing surpassed live TV among internet users in South Africa.

- In H1 2019, 84.6% of the sample population had watched live TV during the prior month, while 81.6% had streamed video from a digital source. This year, those shares were effectively reversed: Fewer than 81% had watched live broadcast TV, and 85.0% had streamed video.
- GlobalWebIndex reported other decisive shifts in entertainment viewing, too. In 2020, fewer internet users were recording TV shows to watch later, but penetration of broadcasters' on-demand and catch-up services reached a new high at 66.6%. Crucially, the share of respondents using subscription video-on-demand (SVOD) services like Netflix had jumped nearly 14 percentage points to 75.3%—a remarkable gain in a single year. Predictably, affluents were among those most likely to have seen movies or TV programs via SVOD.
- Despite these sizable gains in free and paid-for video consumption, broadcast TV still rules time spent. While video streaming occupied an average 1:31 daily, broadcast TV accounted for 2:35.
- Digital audio is on the rise, too, though less steeply. More than 82% of respondents polled in H1 2020 had streamed music, podcasts, or other audio content from digital platforms in the month prior. Music streaming alone claimed 1:54 each day, on average.
- Traditional media saw mixed fortunes in Q1 2020. Broadcast radio's reach in South Africa marginally increased YoY to 82.5% of internet users. But print newspaper readership declined by nearly 10 percentage points to 56.7%. Print magazines suffered even heavier losses, with penetration down 17 percentage points to 51.6%.

Device Ownership in South Africa, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	98.4%	98.9%
Desktop/laptop	76.1%	83.2%
Tablet	46.0%	42.1%
Smart TV	33.1%	36.4%
Game console	27.5%	27.9%
TV streaming stick/device	14.5%	14.1%
Smartwatch	11.4%	12.7%
Feature phone	10.7%	11.6%
Smart wristband	6.9%	7.3%
Smart home device	6.8%	6.1%
VR headset/device	4.7%	3.5%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20569

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Smartphone and Tablet Owners in South Africa, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.5%	98.8%	47.8%	42.5%
Male	98.3%	99.0%	44.2%	41.8%
Age				
16-24	98.4%	99.3%	40.3%	35.3%
25-34	98.8%	98.9%	43.6%	42.2%
35-44	99.0%	99.1%	54.3%	50.3%
45-54	97.2%	97.8%	53.9%	47.4%
55-64*	-	-	-	-
Annual household income group				
High	99.4%	99.7%	59.6%	56.3%
Medium	98.4%	98.9%	49.3%	45.3%
Low	98.3%	98.7%	36.9%	32.1%
N/A**	97.0%	98.2%	37.6%	35.6%
Household location				
Urban	98.5%	98.9%	44.8%	39.6%
Suburban	98.3%	98.8%	48.4%	45.0%
Rural*	-	-	-	-
Total	98.4%	98.9%	46.0%	42.1%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20918

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Smart TV Owners in South Africa, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	34.0%	35.6%
Male	32.3%	37.1%
Age		
16-24	30.1%	30.4%
25-34	31.5%	36.3%
35-44	36.9%	42.1%
45-54	40.3%	42.8%
55-64*	-	-
Annual household income group		
High	48.2%	48.5%
Medium	32.9%	38.9%
Low	25.8%	28.1%
N/A**	25.9%	30.4%
Household location		
Urban	34.9%	35.8%
Suburban	33.8%	38.1%
Rural*	-	-
Total	33.1%	36.4%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20917

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Average Time Spent with Media in South Africa, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Social networking



Broadcast TV



Music streaming



Broadcast radio



Online TV/streaming



Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20914

www.eMarketer.com

Traditional Media Users in South Africa, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20921

www.eMarketer.com

Traditional Media Users in South Africa, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	52.5%	53.4%	84.1%	91.1%
Male	50.6%	59.7%	81.0%	88.9%
Age				
16-24	42.6%	46.4%	71.6%	87.5%
25-34	49.7%	59.7%	90.1%	92.2%
35-44	66.5%	67.2%	89.8%	89.9%
45-54	53.3%	57.4%	84.2%	93.4%
55-64*	-	-	-	-
Annual household income group				
High	58.9%	59.1%	87.4%	94.0%
Medium	56.2%	61.0%	87.1%	94.2%
Low	49.6%	59.0%	80.1%	83.2%
N/A**	26.6%	33.1%	64.4%	86.0%
Household location				
Urban	55.7%	55.7%	83.7%	91.4%
Suburban	48.6%	56.4%	82.0%	88.9%
Rural*	-	-	-	-
Total	51.6%	56.7%	82.5%	90.0%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20920

www.eMarketer.com

TV Viewers in South Africa, by Method, H1 2020

% of internet users

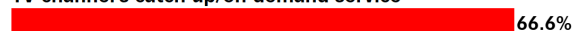
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20922

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Video-on-Demand (VOD) Viewers in South Africa, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	81.2%	84.7%
Male	82.0%	85.2%
Age		
16-24	83.9%	89.2%
25-34	84.7%	85.6%
35-44	83.7%	84.5%
45-54	76.7%	82.7%
55-64*	-	-
Annual household income group		
High	86.9%	88.1%
Medium	81.3%	81.8%
Low	83.2%	85.6%
N/A**	67.9%	85.4%
Household location		
Urban	84.6%	84.8%
Suburban	80.8%	84.6%
Rural*	-	-
Total	81.6%	85.0%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20923

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Social Media Users in South Africa, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	93.2%	94.9%
Male	92.6%	93.6%
Age		
16-24	92.4%	94.9%
25-34	93.5%	95.0%
35-44	94.8%	93.1%
45-54	91.7%	92.5%
55-64*	-	-
Annual household income group		
High	95.8%	94.2%
Medium	92.5%	92.6%
Low	92.4%	95.0%
N/A**	90.5%	95.8%
Household location		
Urban	93.2%	95.3%
Suburban	93.2%	93.2%
Rural*	-	-
Total	92.9%	94.2%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20919

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Digital Audio Listeners in South Africa, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	73.4%	80.0%
Male	80.6%	84.8%
Age		
16-24	82.9%	92.9%
25-34	84.9%	84.1%
35-44	77.0%	79.9%
45-54	58.1%	66.0%
55-64*	-	-
Annual household income group		
High	78.7%	81.7%
Medium	75.6%	80.1%
Low	82.2%	85.3%
N/A**	66.8%	84.3%
Household location		
Urban	83.2%	86.4%
Suburban	75.2%	79.9%
Rural*	-	-
Total	77.0%	82.5%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20915

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Voice Search Users in South Africa, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	26.3%	29.1%
Male	35.9%	40.0%
Age		
16-24	39.4%	46.1%
25-34	34.8%	37.0%
35-44	27.7%	28.7%
45-54	18.4%	18.0%
55-64*	-	-
Annual household income group		
High	32.5%	36.5%
Medium	29.3%	29.9%
Low	32.5%	40.0%
N/A**	29.5%	32.3%
Household location		
Urban	35.7%	37.0%
Suburban	29.2%	33.2%
Rural*	-	-
Total	31.0%	34.8%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20924

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KEY FEATURES

South Korea—home to Samsung and LG among other technology giants—posts high smartphone and PC usage.

- Smartphone penetration rose marginally in South Korea between H1 2019 and H1 2020 to 98.0% of internet users ages 16 to 64, according to GlobalWebIndex. Meanwhile, feature phones have become a rarity; just 3.5% of respondents had one earlier this year.
- PC penetration was also slightly higher in H1 2020, at 83.5%. Tablet ownership climbed by several percentage points to 37.2%. Internet users in high-income households and those ages 16 to 24 were more likely to own either device.
- Respondents spent an average 2 hours, 57 minutes (2:57) each day using PCs and tablets and 2:46 on their mobile phones.

Subscription video penetration is approaching the halfway mark.

- Extensive digital media consumption goes hand in hand with more limited usage of most traditional formats, TV excluded. For example, print newspaper and magazine readership declined more than 5 percentage points between Q1 2019 and Q1 2020 to 40.3% and 32.1%, respectively, per GlobalWebIndex/Publicis Media. In addition, the average daily time spent reading print press remained the lowest recorded for any activity, at just 28 minutes.
- By contrast, live TV remains massively popular in South Korea this year, watched by 90.7% of internet users. Broadcast TV accounted for 2:04 per day, on average—effectively unchanged year over year (YoY).
- Broadcast radio also held its own, though only 53.9% of internet users in South Korea were recent listeners—a share lower than in many advanced economies. Average listening time was up marginally to 35 minutes per day.
- Respondents in the 16-to-24 age bracket were least likely to engage with traditional print and radio formats, while usage was higher among older cohorts and

the affluent.

- Several well-established options for time-shifted TV viewing declined YoY. The share of internet users who watched TV shows via broadcasters' catch-up services in the prior month shrank by nearly 3 percentage points to 62.6%, and fewer than 30% said they'd recorded programs to watch later.
- Some of that attention is moving to subscription video-on-demand (SVOD) services like Netflix. More than 45% of those polled in H1 2020 said they had watched TV shows, films, or other video content from such a service in the month prior, compared with 35.9% in H1 2019. Admittedly, SVOD consumption lags far behind the level of video viewing overall. Some 70.8% of internet users had streamed video content of some kind in the previous month.
- Digital audio also recorded sizable gains compared with H1 2019, with penetration rising nearly 10 percentage points to 62.5%. As last year, the youngest cohort recorded a bigger increase and substantially higher engagement with music streaming, podcasts, and other digital audio content at 75.6%.
- Some 14.6% of internet users owned a game console in H1 2020, per GlobalWebIndex. That share passed 20% among affluent respondents and those ages 25 to 34.
- Social networking appears to have reached a plateau, with fewer than 80% of internet users saying they'd visited a social platform or used a social media app in the preceding month. Compared with most other countries, time spent with social media also remained on the low side at 1:13 per day. Of all the countries that GlobalWebIndex surveyed in H1 2020, only Japan recorded a shorter daily time spent with social (47 minutes).

Device Ownership in South Korea, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	96.9%	98.0%
Desktop/laptop	82.3%	83.5%
Smart TV	37.6%	37.8%
Tablet	33.8%	37.2%
Game console	13.0%	14.6%
Smartwatch	8.6%	11.2%
Smart home device	8.9%	9.6%
TV streaming stick/device	7.5%	6.4%
Smart wristband	6.8%	5.8%
VR headset/device	3.8%	4.2%
Feature phone	3.9%	3.5%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20570

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Smartphone and Tablet Owners in South Korea, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.8%	98.6%	34.1%	37.0%
Male	96.9%	97.3%	33.5%	37.3%
Age				
16-24	98.0%	98.4%	36.5%	41.9%
25-34	97.6%	97.2%	35.0%	37.6%
35-44	96.7%	98.1%	36.7%	40.0%
45-54	95.7%	97.9%	32.5%	38.5%
55-64	96.6%	98.6%	27.4%	27.0%
Annual household income group				
High	97.6%	98.2%	45.2%	52.3%
Medium	98.5%	98.7%	39.0%	36.6%
Low	95.1%	97.1%	23.7%	24.5%
N/A*	96.3%	96.8%	26.1%	32.7%
Household location				
Urban	97.0%	98.3%	34.6%	37.6%
Suburban**	-	-	-	-
Rural**	-	-	-	-
Total	96.9%	98.0%	33.8%	37.2%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20929

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Smart TV Owners in South Korea, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	38.4%	39.2%
Male	36.8%	36.5%
Age		
16-24	26.3%	30.8%
25-34	34.1%	31.8%
35-44	39.9%	42.1%
45-54	40.6%	39.6%
55-64	45.8%	43.8%
Annual household income group		
High	49.0%	47.2%
Medium	45.3%	39.7%
Low	26.6%	30.0%
N/A*	24.8%	25.1%
Household location		
Urban	38.7%	38.5%
Suburban**	-	-
Rural**	-	-
Total	37.6%	37.8%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20928

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Average Time Spent with Media in South Korea, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



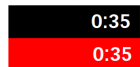
Music streaming



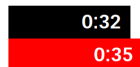
Online TV/streaming



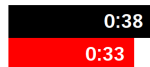
Online press



Broadcast radio



Gaming



Print



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20925

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Traditional Media Users in South Korea, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20932

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Traditional Media Users in South Korea, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	28.9%	32.0%	54.4%	91.9%
Male	35.1%	48.2%	53.5%	87.6%
Age				
16-24	20.2%	27.0%	37.9%	86.0%
25-34	26.0%	37.5%	42.7%	86.6%
35-44	33.8%	38.5%	57.0%	89.8%
45-54	35.3%	42.5%	60.7%	90.2%
55-64	43.7%	54.9%	69.7%	96.4%
Annual household income group				
High	45.1%	55.0%	69.8%	94.8%
Medium	30.9%	39.2%	54.5%	90.5%
Low	26.1%	33.3%	42.9%	85.7%
N/A*	11.5%	17.5%	33.9%	82.0%
Household location				
Urban	33.3%	42.2%	55.6%	90.9%
Suburban**	-	-	-	-
Rural**	-	-	-	-
Total	32.1%	40.3%	53.9%	89.7%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20931

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TV Viewers in South Korea, by Method, H1 2020

% of internet users

Broadcast live on TV channel

90.7%

TV channel's catch-up/on-demand service

62.6%

SVOD*

45.4%

Recorded from TV

29.2%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20933

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Video-on-Demand (VOD) Viewers in South Korea, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	70.4%	70.7%
Male	73.1%	70.8%
Age		
16-24	81.6%	80.6%
25-34	77.1%	79.7%
35-44	70.7%	68.0%
45-54	63.2%	61.6%
55-64	68.6%	66.5%
Annual household income group		
High	76.0%	79.1%
Medium	70.7%	69.2%
Low	71.4%	65.5%
N/A*	62.6%	67.5%
Household location		
Urban	71.1%	71.1%
Suburban**	-	-
Rural**	-	-
Total	71.8%	70.8%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20934

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Social Media Users in South Korea, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	76.4%	80.9%
Male	77.3%	78.2%
Age		
16-24	79.4%	81.3%
25-34	74.1%	79.2%
35-44	77.9%	83.3%
45-54	75.1%	76.4%
55-64	79.0%	77.7%
Annual household income group		
High	83.1%	81.2%
Medium	78.8%	80.6%
Low	72.3%	76.7%
N/A*	71.8%	78.7%
Household location		
Urban	78.0%	79.3%
Suburban**	-	-
Rural**	-	-
Total	76.9%	79.5%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, KakaoStory, Kakao Talk, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say; **omitted due to small sample size

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20930

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Digital Audio Listeners in South Korea, H1 2019 & H1 2020 % of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	54.2%	64.5%
Male	51.1%	60.6%
Age		
16-24	61.9%	75.6%
25-34	56.5%	68.8%
35-44	50.3%	58.4%
45-54	47.4%	56.0%
55-64	48.9%	56.8%
Annual household income group		
High	57.0%	68.5%
Medium	50.6%	60.9%
Low	52.4%	60.2%
N/A*	46.1%	56.7%
Household location		
Urban	53.5%	63.4%
Suburban**	-	-
Rural**	-	-
Total	52.6%	62.5%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20926

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Voice Search Users in South Korea, H1 2019 & H1 2020 % of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	21.2%	19.8%
Male	22.1%	22.2%
Age		
16-24	26.9%	32.0%
25-34	25.5%	24.3%
35-44	22.3%	21.0%
45-54	16.3%	17.2%
55-64	12.0%	18.2%
Annual household income group		
High	27.0%	28.0%
Medium	22.8%	20.9%
Low	18.5%	16.3%
N/A*	15.4%	13.9%
Household location		
Urban	22.5%	21.8%
Suburban**	-	-
Rural**	-	-
Total	21.7%	21.0%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say; **omitted due to small sample size
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20935

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SPAIN

KEY FEATURES

TV and video viewing are settling into new patterns, but traditional media has also kept large audiences.

- Internet users in Spain still devote plenty of attention to live TV. More than 94% of respondents ages 16 to 64 had watched live TV in the month prior to polling and devoted an average of 2 hours, 14 minutes (2:14) daily to TV—6 minutes more than in H1 2019.
- Some 69.1% of respondents had used a TV channel's catch-up or on-demand service to watch programs they'd missed—a slightly higher percentage than last year. Crucially, the share of internet users who'd watched TV via subscription video-on-demand (SVOD) services like Netflix jumped by 10 percentage points, to 77.6% this year. Among younger internet users ages 16 to 24, 92.7% had accessed TV via SVOD in the previous month. In high-income households, 83.1% had done so.
- Despite the notable increase in SVOD usage, overall penetration of VOD services that GlobalWebIndex tracks in Spain dropped from 69.4% in H1 2019 to 65.4% in H1 2020. And video streaming occupied just 1:09 per day, on average—about half the time spent each day with broadcast TV.
- Meanwhile, 69.4% of respondents had listened to digital audio content—including music, podcasts, and dramas—in the month prior to polling. That said, age-related differences remain much more marked among digital audio consumers. In the youngest age group (16- to 24-year-olds), more than 91% said they listened to audio accessed via digital platforms. Usage had grown in almost all demographic groups but still correlated with rising age; penetration among seniors 55 to 64 was just 45.8%.
- Over 80% of web users surveyed had listened to broadcast radio in the prior month. Nearly two-thirds had read a print newspaper, and 59.1% had read a print magazine. All those values were essentially unchanged since H1 2019. Time spent with both radio and print press had declined slightly, however.



Smartphones were more widespread in 2020, while the appeal of tablets and PCs may be waning.

- Fully 97.8% of internet users in Spain owned a smartphone in H1 2020, according to GlobalWebIndex. PC ownership had declined by more than 2 percentage points, to 84.6%. Tablet penetration had also fallen slightly, to 58.7%. As in H1 2019, females were marginally more likely than males to own a tablet or smartphone; ownership of desktops and laptops was roughly equal in both groups this year.
- The time spent each day with both PCs/tablets and mobile phones had risen since last year. Larger screens still commanded a longer period of time each day, averaging 3:16, compared with 2:46 devoted to mobile devices.
- Smartwatches and smart wristbands reached ownership rates of 14.8% and 19.9%, respectively, in Spain in H1 2020. It's interesting that wristbands have attracted more purchasers than smartwatches during the past couple of years. Cost may be a factor—though smart wristbands are more popular even in affluent households.
- Smart TVs are also entering more homes; in H1 2020, overall penetration passed 50% for the first time. Suburban residents were more likely to own a web-enabled TV than those living in cities or rural areas. Meanwhile, the share of survey respondents who owned a TV streaming stick or similar device was also trending upward, to 26.4% of internet users—and over 30% of those in affluent homes.
- Smart home devices—such as systems that enable people to keep track of household electricity consumption or activate appliances remotely—haven't yet benefitted from similar momentum. As of H1 2020, barely one in 10 of those polled owned one. Penetration was slightly greater among internet users ages 16 to 34 and those living in high-income homes.

Device Ownership in Spain, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	97.2%	97.8%
Desktop/laptop	87.2%	84.6%
Tablet	59.4%	58.7%
Smart TV	48.2%	50.1%
Game console	46.3%	42.6%
TV streaming stick/device	24.3%	26.4%
Smart wristband	17.1%	19.9%
Smartwatch	14.4%	14.8%
Smart home device	8.2%	10.6%
Feature phone	7.8%	5.8%
VR headset/device	5.1%	3.9%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20571

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Smartphone and Tablet Owners in Spain, H1 2019 & H1 2020 % of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	97.4%	98.1%	60.8%	59.9%
Male	97.0%	97.4%	57.9%	57.5%
Age				
16-24	97.9%	97.1%	53.5%	52.8%
25-34	98.0%	98.1%	54.6%	55.3%
35-44	97.3%	97.7%	62.8%	60.5%
45-54	97.1%	98.1%	63.1%	61.7%
55-64	95.5%	97.7%	59.3%	60.3%
Annual household income group				
High	97.8%	98.6%	69.3%	69.0%
Medium	98.1%	98.3%	60.7%	59.4%
Low	95.6%	95.9%	47.3%	45.7%
N/A*	96.5%	96.9%	52.2%	51.4%
Household location				
Urban	97.3%	98.0%	59.7%	59.0%
Suburban	97.8%	97.6%	62.1%	60.7%
Rural	95.7%	96.5%	52.7%	53.3%
Total	97.2%	97.8%	59.4%	58.7%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20940

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Smart TV Owners in Spain, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	46.7%	49.7%
Male	49.6%	50.5%
Age		
16-24	45.1%	46.7%
25-34	48.7%	47.9%
35-44	50.6%	51.1%
45-54	48.0%	51.9%
55-64	46.4%	51.2%
Annual household income group		
High	55.5%	55.6%
Medium	49.5%	52.2%
Low	40.0%	43.4%
N/A*	39.4%	43.2%
Household location		
Urban	48.3%	49.5%
Suburban	49.7%	54.1%
Rural	44.8%	47.8%
Total	48.2%	50.1%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20939

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Average Time Spent with Media in Spain, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



Online TV/streaming



Music streaming



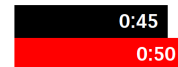
Broadcast radio



Online press



Gaming



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20936

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Traditional Media Users in Spain, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20943

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Traditional Media Users in Spain, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	59.5%	60.0%	79.1%	94.5%
Male	58.7%	71.1%	81.3%	91.8%
Age				
16-24	41.5%	45.2%	62.2%	84.1%
25-34	56.4%	56.6%	77.4%	92.0%
35-44	60.6%	67.5%	84.6%	93.6%
45-54	64.9%	72.8%	85.9%	95.8%
55-64	66.8%	80.0%	83.8%	97.8%
Annual household income group				
High	65.7%	75.3%	84.3%	94.4%
Medium	59.9%	64.8%	83.7%	93.3%
Low	50.3%	54.5%	70.1%	90.0%
N/A*	47.9%	52.9%	71.1%	94.4%
Household location				
Urban	61.4%	68.1%	79.8%	92.9%
Suburban	53.7%	61.4%	82.2%	94.9%
Rural	50.8%	54.2%	80.0%	92.1%
Total	59.1%	65.6%	80.2%	93.2%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20942

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TV Viewers in Spain, by Method, H1 2020

% of internet users

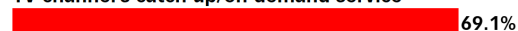
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20944

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Video-on-Demand (VOD) Viewers in Spain, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	65.4%	62.2%
Male	73.4%	68.7%
Age		
16-24	82.6%	79.9%
25-34	80.1%	74.1%
35-44	69.5%	67.5%
45-54	61.7%	58.0%
55-64	55.4%	50.6%
Annual household income group		
High	72.8%	68.3%
Medium	68.1%	64.8%
Low	69.8%	64.2%
N/A*	59.5%	54.3%
Household location		
Urban	70.7%	66.3%
Suburban	69.9%	66.5%
Rural	60.0%	58.2%
Total	69.4%	65.4%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20945

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Social Media Users in Spain, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	86.9%	90.4%
Male	86.8%	89.5%
Age		
16-24	89.1%	93.4%
25-34	88.8%	90.5%
35-44	87.2%	89.5%
45-54	85.8%	88.9%
55-64	83.6%	88.4%
Annual household income group		
High	88.5%	90.5%
Medium	87.2%	89.5%
Low	84.9%	89.8%
N/A*	85.5%	88.7%
Household location		
Urban	86.8%	90.2%
Suburban	88.4%	90.5%
Rural	85.5%	87.6%
Total	86.9%	89.9%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Taringa!, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20941

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Digital Audio Listeners in Spain, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	63.2%	67.9%
Male	67.7%	70.8%
Age		
16-24	91.0%	91.2%
25-34	77.7%	82.0%
35-44	65.4%	70.7%
45-54	53.6%	61.3%
55-64	44.6%	45.8%
Annual household income group		
High	69.7%	72.0%
Medium	63.0%	68.6%
Low	65.3%	66.9%
N/A*	59.0%	64.9%
Household location		
Urban	66.8%	69.9%
Suburban	65.3%	71.1%
Rural	57.1%	63.7%
Total	65.5%	69.4%

Note: services include Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20937

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Voice Search Users in Spain, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	30.0%	31.7%
Male	36.0%	39.3%
Age		
16-24	45.8%	48.8%
25-34	41.4%	43.9%
35-44	33.2%	37.0%
45-54	27.4%	29.3%
55-64	19.9%	21.5%
Annual household income group		
High	36.7%	38.5%
Medium	30.6%	34.1%
Low	33.9%	36.8%
N/A*	25.3%	28.8%
Household location		
Urban	34.3%	36.6%
Suburban	32.1%	34.8%
Rural	26.0%	29.6%
Total	33.1%	35.6%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20946

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KEY FEATURES

In this advanced digital landscape, most media behaviors have changed only slightly in the past year.

- As in other developed economies, several of the most dramatic changes in device ownership and media habits have already taken place in Sweden. Diverse digital behaviors now coexist with consumption of traditional formats, such as broadcast TV, radio, and print.
- In H1 2020, 77.9% of internet users ages 16 to 64 had watched live TV in the prior month, according to GlobalWebIndex. Live TV viewing is less widespread in Sweden than in most European nations, but within the country, penetration had shifted just 1 percentage point since H1 2019.
- The reach of broadcast radio was not far behind, at 76.7% of those polled. As with live TV, that share was somewhat higher than in 2019. Penetration ranged from 84.3% in the oldest cohort to 70.4% among 16- to 24-year-olds. At least some of the increase was likely due to COVID-19 and residents' desire to keep up with the latest news from trusted sources. The average time spent with broadcast radio was 1 hour, 7 minutes (1:07) per day—less than in 2019—but average time spent with broadcast TV had risen above 2 hours daily.
- Sweden's online population hasn't turned its back on print media, either; in fact, this is one of the only countries where GlobalWebIndex reported greater engagement with print media in 2020 than in 2019. About 59% of respondents had read a print newspaper in the month prior, and almost half had read a print magazine. Some age-related disparities still existed among print consumers, but these were less pronounced than in 2019, and readership had risen in all age groups except among those 55 to 64. More than half of 16- to 24-year-olds had recently read a print newspaper, for example, compared with 67.0% of those 55 to 64.
- At the same time, a huge majority of Sweden's internet users are familiar with digital video options, including time-shifted TV viewing. In H1 2020, over 67% had used broadcasters' catch-up services to watch TV shows in the month prior to polling, for example, while 90.5% had seen video-on-demand (VOD)—significantly higher than the share viewing live TV during the same period. Even among the oldest users ages 55 to 64, more than 80% were VOD viewers.
- One type of video offering saw a substantial leap in usage year over year (YoY): subscription VOD (SVOD). Between H1 2019 and H1 2020, penetration of services such as Netflix and Viaplay rose by more than 6 percentage points, from 66.5% to 72.8% of internet users.
- Digital audio services were already firmly established in Sweden. In H1 2020, penetration of digital audio rose very slightly, to 72.5%. As in 2019, usage was nearly ubiquitous among respondents 16 to 24, and also very high (86.2%) among those 25 to 34.
- Social networking was also more common in H1 2020 than a year prior; here, too, the coronavirus was a probable cause of increased engagement. GlobalWebIndex found that 86.3% of web users visited social media platforms in the month preceding the survey and spent an average of 1:48 per day. Respondents in the oldest group, ages 55 to 64, were least likely to have done so, but this age bracket also recorded usage above 80%.
- By contrast, takeup of voice assistants has been modest in Sweden. In H1 2020, one in five respondents had used voice commands with a smart speaker in the prior month, or used voice apps such as Siri or Cortana. The oldest age group seemed the least interested, posting penetration of just 10.3%. But it's worth noting that penetration actually declined in the 16-to-24 bracket, from 33.6% last year to 31.3% in 2020. Usage was also slightly lower among another early-adopter demographic: respondents in high-income households. In that group, the share who had recently used voice search declined from 23.5% to 22.7%.

Similarly, Sweden posted few significant changes in penetration of digital devices.

- Almost 96% of internet users in Sweden owned a smartphone in H1 2020, while 78.3% owned a desktop or laptop, and 51.7% owned a tablet. Penetration of both PCs and tablets had fallen YoY, however. Respondents spent an average of 3:21 each day with PCs and tablets, and 2:37 with mobile phones. PC/tablet time had fallen by a few minutes, while mobile time rose.
- Some 47.7% of internet users owned a smart TV in H1 2020—effectively the same percentage as in H1 2019. About half that number (23.3% of respondents) owned a TV streaming stick or a similar device.

Device Ownership in Sweden, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	94.6%	95.6%
Desktop/laptop	80.6%	78.3%
Tablet	55.0%	51.7%
Smart TV	48.0%	47.7%
Game console	34.4%	33.2%
TV streaming stick/device	24.8%	23.3%
Smart home device	10.0%	12.0%
Smart wristband	8.8%	10.9%
Smartwatch	8.6%	10.8%
Feature phone	6.4%	5.4%
VR headset/device	5.5%	4.8%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20572

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Smartphone and Tablet Owners in Sweden, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	95.7%	96.7%	56.6%	52.1%
Male	93.5%	94.5%	53.4%	51.2%
Age				
16-24	95.1%	95.6%	46.3%	40.8%
25-34	95.6%	94.9%	53.9%	47.9%
35-44	93.8%	97.3%	58.5%	55.8%
45-54	95.3%	96.5%	59.4%	58.2%
55-64	92.7%	93.3%	56.4%	55.4%
Annual household income group				
High	96.1%	97.5%	67.0%	64.0%
Medium	95.5%	96.3%	60.9%	55.0%
Low	92.5%	93.7%	42.3%	40.2%
N/A*	95.2%	95.3%	52.1%	50.9%
Household location				
Urban	94.7%	95.9%	52.3%	51.1%
Suburban	94.8%	94.1%	61.6%	50.9%
Rural	94.1%	96.5%	52.4%	53.7%
Total	94.6%	95.6%	55.0%	51.7%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20951

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Smart TV Owners in Sweden, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	45.5%	44.2%
Male	50.4%	51.1%
Age		
16-24	41.6%	43.3%
25-34	48.9%	48.4%
35-44	47.5%	49.0%
45-54	51.9%	50.6%
55-64	49.8%	46.7%
Annual household income group		
High	59.2%	58.7%
Medium	52.4%	53.4%
Low	38.9%	38.6%
N/A*	40.6%	38.7%
Household location		
Urban	50.3%	49.7%
Suburban	44.9%	47.0%
Rural	47.0%	44.3%
Total	48.0%	47.7%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20950

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Average Time Spent with Media in Sweden, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Social networking



Music streaming



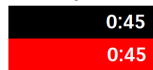
Broadcast radio



Online TV/streaming



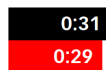
Online press



Gaming



Print



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20947

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Traditional Media Users in Sweden, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019 ■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20954

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Traditional Media Users in Sweden, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	50.7%	55.8%	74.8%	90.1%
Male	48.0%	61.6%	78.5%	85.6%
Age				
16-24	34.0%	50.4%	70.4%	83.0%
25-34	43.1%	48.1%	71.7%	81.3%
35-44	53.3%	59.9%	75.8%	86.2%
45-54	54.9%	68.7%	81.7%	92.7%
55-64	62.0%	67.0%	84.3%	96.5%
Annual household income group				
High	50.3%	55.8%	82.3%	88.3%
Medium	53.5%	60.7%	77.3%	92.4%
Low	47.5%	59.3%	73.1%	83.7%
N/A*	43.6%	58.5%	74.1%	86.7%
Household location				
Urban	46.2%	58.7%	79.0%	88.0%
Suburban	51.9%	57.0%	74.3%	85.5%
Rural	52.6%	60.6%	74.7%	89.8%
Total	49.3%	58.7%	76.7%	87.8%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20953

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TV Viewers in Sweden, by Method, H1 2020

% of internet users

Broadcast live on TV channel

77.9%

SVOD*

72.8%

TV channel's catch-up/on-demand service

67.2%

Recorded from TV

31.2%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20955

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Video-on-Demand (VOD) Viewers in Sweden, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	90.4%	90.9%
Male	88.0%	90.2%
Age		
16-24	96.0%	97.3%
25-34	94.9%	94.5%
35-44	89.0%	91.8%
45-54	86.1%	88.0%
55-64	79.0%	80.2%
Annual household income group		
High	91.2%	92.0%
Medium	91.7%	92.5%
Low	87.0%	88.6%
N/A*	86.2%	89.0%
Household location		
Urban	90.3%	93.3%
Suburban	88.4%	90.7%
Rural	87.8%	83.7%
Total	89.2%	90.5%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20956

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Social Media Users in Sweden, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	86.5%	87.6%
Male	82.6%	85.1%
Age		
16-24	89.4%	92.1%
25-34	84.6%	88.4%
35-44	86.5%	84.9%
45-54	82.9%	85.6%
55-64	78.6%	80.3%
Annual household income group		
High	85.9%	87.5%
Medium	86.2%	86.8%
Low	83.9%	86.4%
N/A*	79.7%	83.0%
Household location		
Urban	83.3%	86.8%
Suburban	86.3%	86.5%
Rural	84.8%	85.1%
Total	84.5%	86.3%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20952

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Digital Audio Listeners in Sweden, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	71.5%	72.0%
Male	72.1%	73.0%
Age		
16-24	95.0%	95.8%
25-34	83.0%	86.2%
35-44	75.4%	72.4%
45-54	60.7%	62.0%
55-64	42.5%	44.2%
Annual household income group		
High	77.6%	75.8%
Medium	70.7%	71.2%
Low	68.1%	71.4%
N/A*	72.6%	72.5%
Household location		
Urban	74.5%	78.2%
Suburban	73.1%	73.3%
Rural	64.9%	58.1%
Total	71.8%	72.5%

Note: services include Amazon Music Unlimited, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way.";

*don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20948

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Voice Search Users in Sweden, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	14.6%	16.8%
Male	24.2%	23.2%
Age		
16-24	33.6%	31.3%
25-34	23.9%	22.6%
35-44	17.9%	21.5%
45-54	12.5%	14.6%
55-64	9.2%	10.3%
Annual household income group		
High	23.5%	22.7%
Medium	14.8%	20.8%
Low	21.3%	20.2%
N/A*	17.0%	14.0%
Household location		
Urban	21.7%	22.0%
Suburban	17.9%	19.0%
Rural	16.6%	17.1%
Total	19.4%	20.0%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20957

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SWITZERLAND

KEY FEATURES

Most internet users in this comparatively wealthy country have a smartphone, a PC, and a tablet.

- More than 96% of internet users ages 16 to 64 polled by GlobalWebIndex owned a smartphone in H1 2020—a marginal increase since H1 2019. Just 5.2% of respondents owned a feature phone—though ownership was double that (10.4%) in the oldest age group (55 to 64).
- In addition, 87.0% of respondents owned a desktop or laptop in H1 2020, and tablet penetration stood at 56.6%. In both cases, penetration was virtually identical to that in H1 2019. Predictably, tablets and PCs were more common in middle- and high-income households.

While younger people have readily adopted digital media habits, many older respondents remain loyal to traditional formats.

- Broadly speaking, usage of traditional media in Switzerland remains robust across all age groups. For example, two-thirds of 16- to 24-year-olds had listened to live radio in the month before polling in Q1 2020, and a similar share had read a print newspaper, per GlobalWebIndex/Publicis Media. But penetration rates for both newspapers and radio were nearly 20 percentage points higher among individuals ages 45 to 54.
- Younger internet users were also more engaged with video streaming than their elders. While 72.6% of all respondents had streamed video-on-demand (VOD) content in the month prior to polling, that share rose to 91.8% in the youngest cohort.
- Adoption of subscription VOD (SVOD) services in particular has rocketed in Switzerland since H1 2019, from 47.3% of respondents to 57.5% in H1 2020. Usage did increase across all age brackets but still varied hugely between the youngest and oldest respondents. Some 89.4% of web users ages 16 to 24 had watched SVOD content in the prior month in H1 2020; among those ages 55 to 64, barely 25% were SVOD viewers.

- Apart from the internet itself, live TV is the most widespread media activity among respondents, reaching 84.2% in H1 2020 and claiming an average 1 hour, 53 minutes (1:53) per day.

Many newer digital devices and services are struggling to reach the mainstream.

- Just 16.0% of male and 10.9% of female internet users in Switzerland owned a smartwatch in H1 2020. Penetration was highest in affluent households, at 20.3%.
- Somewhat surprisingly, the greatest takeup of smart home products—such as energy consumption monitors or remotely controlled appliances—was among the youngest internet users, ages 16 to 24, at 10.7%. But these devices haven't achieved significant market share overall, posting ownership of just 8.2% in H1 2020.
- The youngest internet users were also the foremost adopters of voice search. Across the sample as a whole, 21.9% of respondents said they had used voice assistants such as Cortana or Siri in the previous month; among those ages 16 to 24, that share was 32.9%. Penetration was also above average (27.9%) among urban web users.
- By contrast, social networking is popular with a large proportion of Switzerland's internet users. In H1 2020, 85.4% of those polled said they had logged in to social media sites or apps in the prior month—greater than the share who watched live TV. Again, younger respondents recorded the highest involvement with social networks, at 93.2%.

Device Ownership in Switzerland, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	94.8%	96.1%
Desktop/laptop	87.8%	87.0%
Tablet	56.5%	56.6%
Smart TV	44.3%	44.7%
Game console	34.2%	34.5%
TV streaming stick/device	12.7%	14.4%
Smartwatch	10.9%	13.5%
Smart wristband	8.9%	12.2%
Smart home device	7.5%	8.2%
Feature phone	5.4%	5.2%
VR headset/device	3.3%	3.2%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20573

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Smartphone and Tablet Owners in Switzerland, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	96.4%	96.7%	57.3%	56.6%
Male	93.2%	95.6%	55.7%	56.6%
Age				
16-24	97.5%	96.4%	47.9%	44.2%
25-34	96.7%	97.2%	53.2%	49.1%
35-44	96.5%	96.5%	60.2%	63.0%
45-54	93.8%	96.9%	60.4%	61.9%
55-64	88.9%	93.0%	59.6%	63.0%
Annual household income group				
High	95.4%	97.9%	61.7%	69.8%
Medium	95.9%	96.8%	62.1%	63.0%
Low	94.1%	95.3%	50.0%	46.6%
N/A*	93.4%	94.7%	52.9%	49.7%
Household location				
Urban	95.3%	96.1%	55.9%	56.1%
Suburban	95.1%	96.6%	57.9%	55.3%
Rural	94.0%	95.8%	56.1%	57.9%
Total	94.8%	96.1%	56.5%	56.6%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20963

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Smart TV Owners in Switzerland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	39.2%	41.6%
Male	49.2%	47.7%
Age		
16-24	43.6%	41.1%
25-34	45.2%	47.1%
35-44	47.2%	48.1%
45-54	46.6%	45.6%
55-64	37.0%	40.0%
Annual household income group		
High	51.5%	51.5%
Medium	49.2%	49.3%
Low	39.8%	38.1%
N/A*	36.4%	41.4%
Household location		
Urban	43.1%	45.0%
Suburban	48.7%	45.0%
Rural	42.2%	44.2%
Total	44.3%	44.7%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20962

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Average Time Spent with Media in Switzerland, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Broadcast TV



Broadcast radio



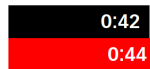
Social networking



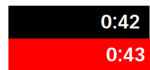
Music streaming



Online press



Online TV/streaming



Print



Gaming



■ H1 2019 ■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20959

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Traditional Media Users in Switzerland, Q1 2019 & Q1 2020 % of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019 ■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20966

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Traditional Media Users in Switzerland, Q1 2020 % of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	63.6%	72.0%	78.2%	90.3%
Male	66.4%	78.0%	78.1%	85.6%
Age				
16-24	41.0%	65.5%	66.4%	79.1%
25-34	60.1%	65.9%	74.2%	84.5%
35-44	64.5%	73.6%	80.1%	87.8%
45-54	78.6%	84.2%	85.9%	94.6%
55-64	76.7%	84.4%	81.8%	92.0%
Annual household income group				
High	69.7%	82.2%	83.4%	87.7%
Medium	66.5%	76.4%	81.1%	88.3%
Low	63.4%	74.9%	72.3%	87.5%
N/A*	60.7%	65.8%	78.5%	88.3%
Household location				
Urban	67.6%	80.9%	77.0%	89.0%
Suburban	58.6%	66.9%	71.9%	85.3%
Rural	67.1%	75.2%	83.5%	88.8%
Total	65.0%	75.0%	78.2%	87.9%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20965

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TV Viewers in Switzerland, by Method, H1 2020

% of internet users

Broadcast live on TV channel

84.2%

Recorded from TV

61.0%

SVOD*

57.5%

TV channel's catch-up/on-demand service

56.8%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20967

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Video-on-Demand (VOD) Viewers in Switzerland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	66.0%	71.4%
Male	73.0%	73.8%
Age		
16-24	92.5%	91.8%
25-34	82.9%	86.2%
35-44	70.8%	72.1%
45-54	58.3%	62.8%
55-64	44.1%	51.2%
Annual household income group		
High	72.2%	77.1%
Medium	65.3%	75.2%
Low	71.9%	71.4%
N/A*	69.1%	65.0%
Household location		
Urban	75.3%	76.2%
Suburban	72.3%	73.4%
Rural	62.3%	68.6%
Total	69.5%	72.6%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20968

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Social Media Users in Switzerland, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	85.9%	85.9%
Male	86.4%	85.0%
Age		
16-24	91.5%	93.2%
25-34	86.8%	86.5%
35-44	86.5%	85.0%
45-54	82.5%	83.0%
55-64	84.6%	80.1%
Annual household income group		
High	85.4%	86.8%
Medium	87.2%	86.4%
Low	87.3%	85.3%
N/A*	83.8%	82.5%
Household location		
Urban	87.4%	86.6%
Suburban	85.0%	86.1%
Rural	85.9%	83.8%
Total	86.2%	85.4%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20964

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Digital Audio Listeners in Switzerland, H1 2019 & H1 2020 % of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	55.7%	62.9%
Male	61.1%	64.2%
Age		
16-24	86.1%	87.7%
25-34	64.5%	76.6%
35-44	59.1%	65.3%
45-54	49.3%	51.2%
55-64	34.9%	38.8%
Annual household income group		
High	66.1%	66.8%
Medium	51.3%	66.0%
Low	60.1%	61.5%
N/A*	57.4%	59.4%
Household location		
Urban	63.3%	69.9%
Suburban	65.8%	63.9%
Rural	48.8%	57.3%
Total	58.5%	63.6%

Note: services include Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20960

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Voice Search Users in Switzerland, H1 2019 & H1 2020 % of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	18.9%	17.8%
Male	24.7%	25.9%
Age		
16-24	34.6%	32.9%
25-34	25.6%	25.2%
35-44	21.2%	19.8%
45-54	18.3%	19.3%
55-64	10.9%	13.2%
Annual household income group		
High	21.8%	24.9%
Medium	20.8%	24.2%
Low	25.4%	20.6%
N/A*	18.1%	17.1%
Household location		
Urban	26.7%	27.9%
Suburban	22.6%	19.0%
Rural	16.8%	18.2%
Total	21.8%	21.9%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20958

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TAIWAN

KEY FEATURES

Ownership of most digital devices grew in H1 2019. In H1 2020, that pattern reversed in some cases.

- Smartphone ownership was effectively universal in Taiwan this year, as 98.2% of internet users ages 16 to 64 owned an advanced handset, according to GlobalWebIndex. However, PCs and tablets were less widespread in H1 2020; the shares of respondents owning each device fell to 74.7% and 39.8%, respectively.
- Daily media time is shifting toward mobile, too. In H1 2019, average time spent with PCs and tablets was almost 30 minutes more than mobile. In 2020, PCs and tablets still claimed more time, but the gap had narrowed to 10 minutes. Mobile time totaled 3 hours, 44 minutes (3:44), while PC time stood at 3:54.
- Smart TV ownership in Taiwan dropped by 3.5 percentage points between H1 2019 and H1 2020, to 22.7%.
- Penetration of smart home products—such as household energy monitors or remotely controlled security systems—had also fallen, from 9.3% to 7.6%, though ownership did reach 10.0% among internet users in affluent homes.
- Penetration of smart wristbands did post a modest gain, owned by 15.9% of internet users. But smartwatches joined the list of devices recording lower ownership in H1 2020, at 9.9%. Males were more likely than females to own either item. Also, affluence was a key correlate in both cases. For example, 20.9% of respondents living in high-income households owned a smart wristband, compared with 10.7% of those in low-income homes.
- While several digital devices seem to be losing fans in Taiwan, most digital services saw steady or increased takeup compared with H1 2019. Usage of voice assistants was effectively identical to last year; 38.7% of respondents had carried out a voice search via Siri or Cortana in the prior month, or used voice commands to activate a smart speaker. Similar to last year, males and 16- to 34-year-olds recorded above-average engagement with voice search.

Live TV and online video streaming reach over twice as many viewers as subscription video-on-demand (SVOD) services do.

- Live TV viewing seemed to be declining in Taiwan in H1 2019—but GlobalWebIndex noted slightly greater penetration in H1 2020, at 79.4%. The coronavirus pandemic may be partly responsible, as many people used live TV as well as online sources to keep up with health bulletins and related news. However, internet users spent 1:26 per day, on average, with live TV—compared with 1:31 in H1 2019.
- It's possible that more live TV viewing has meant less need for internet users to record shows for later, or use broadcasters' catch-up services. Whatever the reasons, both methods of time-shifting were less popular in H1 2020, though by small margins.
- According to GlobalWebIndex, Taiwan also bucked a trend seen in most countries surveyed this year: a major increase in consumption of SVOD services such as Netflix. This transition was well underway last year, but SVOD penetration slipped to 37.3% in H1 2020. It's not completely clear why that share dropped, but perhaps the cost of SVOD became a burden for some internet users, or they found other ways to access similar material.
- Large numbers of respondents were still watching digital video. Overall, 82.5% of those polled in Taiwan had streamed video content of some kind in the prior month. Younger internet users (ages 16 to 34) and the most affluent remained the keenest digital video viewers.
- Younger people were more responsive to digital audio, too. But this category also reached new audiences in other cohorts this year, as overall penetration of streaming music, podcasts, and other digital audio content climbed from 50.8% in H1 2019 to 56.9% in H1 2020. Time spent streaming music averaged 1:04 per day, while video streaming occupied an average 57 minutes per day. Both times were unchanged since last year.

Device Ownership in Taiwan, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	98.6%	98.2%
Desktop/laptop	78.8%	74.7%
Tablet	44.2%	39.8%
Smart TV	26.2%	22.7%
Game console	21.7%	19.8%
Smart wristband	15.1%	15.9%
TV streaming stick/device	12.8%	12.0%
Smartwatch	11.9%	9.9%
Smart home device	9.3%	7.6%
Feature phone	5.8%	4.2%
VR headset/device	3.7%	2.1%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20574

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Smartphone and Tablet Owners in Taiwan, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.8%	98.7%	46.0%	39.9%
Male	98.5%	97.6%	42.4%	39.8%
Age				
16-24	98.9%	98.2%	30.5%	28.5%
25-34	98.8%	97.5%	39.9%	33.1%
35-44	99.3%	98.3%	51.4%	44.4%
45-54	98.3%	98.9%	55.2%	48.4%
55-64*	-	-	-	-
Annual household income group				
High	99.7%	99.3%	57.7%	51.2%
Medium	98.6%	98.5%	48.6%	39.2%
Low	98.1%	96.8%	31.5%	30.4%
N/A**	97.3%	96.3%	27.7%	24.5%
Household location				
Urban	98.7%	98.4%	47.7%	42.6%
Suburban	98.6%	97.6%	36.3%	35.2%
Rural*	-	-	-	-
Total	98.6%	98.2%	44.2%	39.8%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20973

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Smart TV Owners in Taiwan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	26.6%	21.2%
Male	25.7%	24.2%
Age		
16-24	18.8%	16.2%
25-34	20.9%	19.0%
35-44	29.0%	24.4%
45-54	31.4%	29.4%
55-64*	-	-
Annual household income group		
High	38.4%	29.7%
Medium	27.9%	23.2%
Low	13.8%	16.8%
N/A**	18.5%	11.1%
Household location		
Urban	29.1%	23.0%
Suburban	19.2%	23.2%
Rural*	-	-
Total	26.2%	22.7%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20972

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Average Time Spent with Media in Taiwan, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Social networking



Broadcast TV



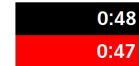
Music streaming



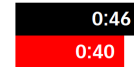
Online TV/streaming



Online press



Gaming



Print



Broadcast radio



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20969

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Traditional Media Users in Taiwan, Q1 2019 & Q1 2020

% of internet users

TV viewers



Newspaper readers



Magazine readers



Radio listeners



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20976

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Traditional Media Users in Taiwan, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	40.3%	41.7%	41.2%	87.9%
Male	46.1%	48.8%	45.2%	87.1%
Age				
16-24	36.7%	31.7%	29.0%	82.4%
25-34	35.2%	38.7%	35.9%	86.3%
35-44	44.1%	48.0%	48.7%	89.0%
45-54	48.9%	51.3%	48.4%	90.1%
55-64*	-	-	-	-
Annual household income group				
High	54.4%	54.0%	51.7%	90.1%
Medium	39.0%	44.7%	40.6%	92.1%
Low	32.7%	35.1%	35.7%	83.3%
N/A**	37.3%	34.6%	35.1%	69.1%
Household location				
Urban	46.6%	48.4%	43.5%	88.9%
Suburban	37.6%	39.0%	41.9%	84.9%
Rural*	-	-	-	-
Total	43.2%	45.3%	43.2%	87.5%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20975

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TV Viewers in Taiwan, by Method, H1 2020

% of internet users

Broadcast live on TV channel



TV channel's catch-up/on-demand service



Recorded from TV



SVOD*



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20977

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Video-on-Demand (VOD) Viewers in Taiwan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	84.5%	81.8%
Male	82.4%	83.2%
Age		
16-24	90.9%	89.1%
25-34	87.8%	88.7%
35-44	81.6%	82.3%
45-54	78.3%	77.1%
55-64*	-	-
Annual household income group		
High	84.7%	86.9%
Medium	80.4%	82.3%
Low	85.8%	80.4%
N/A**	82.9%	70.5%
Household location		
Urban	83.9%	83.4%
Suburban	82.0%	79.7%
Rural*	-	-
Total	83.5%	82.5%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20978

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Social Media Users in Taiwan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	80.0%	81.1%
Male	78.7%	80.9%
Age		
16-24	74.4%	82.2%
25-34	79.5%	79.1%
35-44	80.9%	82.0%
45-54	81.5%	81.8%
55-64*	-	-
Annual household income group		
High	84.0%	84.8%
Medium	80.7%	81.1%
Low	76.4%	78.3%
N/A**	71.1%	74.0%
Household location		
Urban	80.7%	82.3%
Suburban	75.6%	78.0%
Rural*	-	-
Total	79.3%	81.0%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20974

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Digital Audio Listeners in Taiwan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	48.6%	55.9%
Male	53.1%	58.0%
Age		
16-24	64.5%	62.9%
25-34	52.4%	68.8%
35-44	48.2%	55.2%
45-54	41.9%	49.1%
55-64*	-	-
Annual household income group		
High	56.5%	63.3%
Medium	45.9%	58.6%
Low	53.6%	50.7%
N/A**	38.9%	39.0%
Household location		
Urban	52.1%	56.8%
Suburban	49.2%	56.6%
Rural*	-	-
Total	50.8%	56.9%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20970

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Voice Search Users in Taiwan, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	35.2%	35.9%
Male	42.6%	41.4%
Age		
16-24	47.1%	47.6%
25-34	46.0%	44.5%
35-44	37.9%	39.8%
45-54	29.5%	33.1%
55-64*	-	-
Annual household income group		
High	43.5%	40.0%
Medium	39.4%	39.2%
Low	34.5%	37.5%
N/A**	35.7%	35.0%
Household location		
Urban	40.2%	39.9%
Suburban	37.0%	36.6%
Rural*	-	-
Total	38.9%	38.7%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20979

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KEY FEATURES

Internet users in Thailand spent a record amount of time with mobile devices, with social media being a key driver.

- Smartphone penetration in Thailand reached 98.9% of internet users ages 16 to 64 in H1 2020—a very slight increase compared with H1 2019, per GlobalWebIndex. Ownership of PCs and tablets also rose, and by more significant margins, but remained at far lower levels—46.2% of internet users owned a desktop or laptop, while 31.8% owned a tablet.
- Time spent on mobile devices in H1 2020 stood at 5 hours, 6 minutes (5:06) per day, on average—compared with 3:38 spent on PCs/tablets. Mobile time had risen since last year, while PC time declined. But we should remember that Thailand’s online population is predominantly young and urban; both of these traits are associated with higher usage of mobile devices.
- Smartwatches had a more positive year in Thailand than in many other nations, with ownership up nearly 6 percentage points, to 15.9%. That was the most substantial shift in any device or behavior in the country.
- Smart TV penetration climbed nearly 5 percentage points year over year (YoY), to 35.8% in H1 2020. As in H1 2019, ownership was highest (50.7%) among affluents, and also above average among older respondents and those living in urban areas.
- Of course, smart TVs aren’t a prerequisite for viewing digital TV content. Over 72% of internet users polled in H1 2020 had used a broadcaster’s catch-up or on-demand service in the prior month, and 61.9% had recorded TV shows to watch later.
- The share of internet users who accessed subscription video-on-demand (SVOD) services such as Netflix or WeTV was quite high, at 56.8%. In contrast to most other countries surveyed, Thailand didn’t register any increase in usage of SVOD between H1 2019 and H1 2020.
- Overall penetration of VOD in Thailand was also essentially unchanged YoY, at a remarkable 93.8% of internet users. They devoted an estimated 1:38 daily to streaming or watching TV online.

- Social networking was also virtually universal, with 94.4% of the online population using social sites or apps in the previous month. It’s worth noting that GlobalWebIndex includes YouTube in its social media category, so that anyone streaming video on that platform counts as a social network user. This may also help to explain why the penetration rates of social media and digital video are so similar. Time spent on social networks slipped by 10 minutes between H1 2019 and H1 2020—but it remained high by global standards, at 2:47.
- Penetration of digital audio—such as music and podcasts—passed 80% in H1 2020 and reached 87.7% among respondents ages 16 to 24. Usage was lowest in the 55-to-64 age bracket, at 65.3%, but still far higher than the comparable figures in most countries surveyed.
- Many internet users in Thailand are also fans of voice assistants. In total, 47.9% of respondents said they had used Siri or Cortana on their smartphone or gave voice commands to a smart speaker in the month prior. Young adults ages 16 to 34 recorded above-average penetration, at 51.9%, but usage remained highest (52.1%) among affluent households.

Penetration and time spent with traditional media are declining, with print newspapers being hit hardest.

- In Q1 2019, 56.3% of survey respondents had read a print newspaper in the prior month; in Q1 2020, 52.4% had done so, per GlobalWebIndex/Publicis Media. During the same period, magazine readership dropped below the halfway mark, to 49.0%. Similar to last year, those in the 45-to-54 age bracket were most likely to consume print content. Internet users in affluent homes and those living in urban areas also maintained above-average engagement with print formats. Time spent daily with print press was just 1 minute less YoY, at 46 minutes.
- According to GlobalWebIndex, 87.2% of internet users surveyed in H1 2020 had watched live TV in the prior month, a drop from 90.3% in H1 2019. Broadcast TV did claim an average 2:00 each day—but that was 14 minutes less than last year.

- Broadcast radio occupied less time than any other activity respondents were asked about, at 40 minutes, and penetration also declined by a couple of percentage points, to 53.8%. That said, older internet users, affluents, and city dwellers posted much higher response rates.

Device Ownership in Thailand, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	98.7%	98.9%
Desktop/laptop	43.6%	46.2%
Smart TV	31.0%	35.8%
Tablet	30.3%	31.8%
Smartwatch	10.0%	15.9%
Game console	11.2%	11.8%
TV streaming stick/device	8.1%	7.3%
Smart wristband	5.7%	7.1%
Feature phone	6.5%	6.1%
Smart home device	4.2%	4.2%
VR headset/device	2.8%	2.5%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20575

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Smartphone and Tablet Owners in Thailand, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.2%	99.1%	30.4%	32.2%
Male	99.3%	98.6%	30.2%	31.3%
Age				
16-24	98.9%	98.8%	25.2%	25.1%
25-34	99.3%	98.7%	30.8%	30.7%
35-44	98.6%	98.8%	33.2%	34.4%
45-54	97.6%	99.0%	36.0%	37.4%
55-64*	-	-	-	-
Annual household income group				
High	99.0%	99.0%	46.9%	48.7%
Medium	99.4%	99.4%	33.0%	32.3%
Low	98.6%	98.6%	20.2%	21.2%
N/A**	96.6%	97.5%	12.4%	16.3%
Household location				
Urban	99.0%	99.0%	35.2%	38.2%
Suburban	99.0%	99.1%	26.9%	30.1%
Rural	97.4%	98.1%	18.0%	15.5%
Total	98.7%	98.9%	30.3%	31.8%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20984

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Smart TV Owners in Thailand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	30.4%	35.1%
Male	31.7%	36.5%
Age		
16-24	21.8%	22.2%
25-34	32.8%	37.5%
35-44	33.7%	43.6%
45-54	39.2%	42.5%
55-64*	-	-
Annual household income group		
High	48.6%	50.7%
Medium	34.5%	40.6%
Low	20.7%	23.6%
N/A**	9.1%	14.8%
Household location		
Urban	35.8%	42.1%
Suburban	29.6%	35.2%
Rural	15.9%	18.2%
Total	31.0%	35.8%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

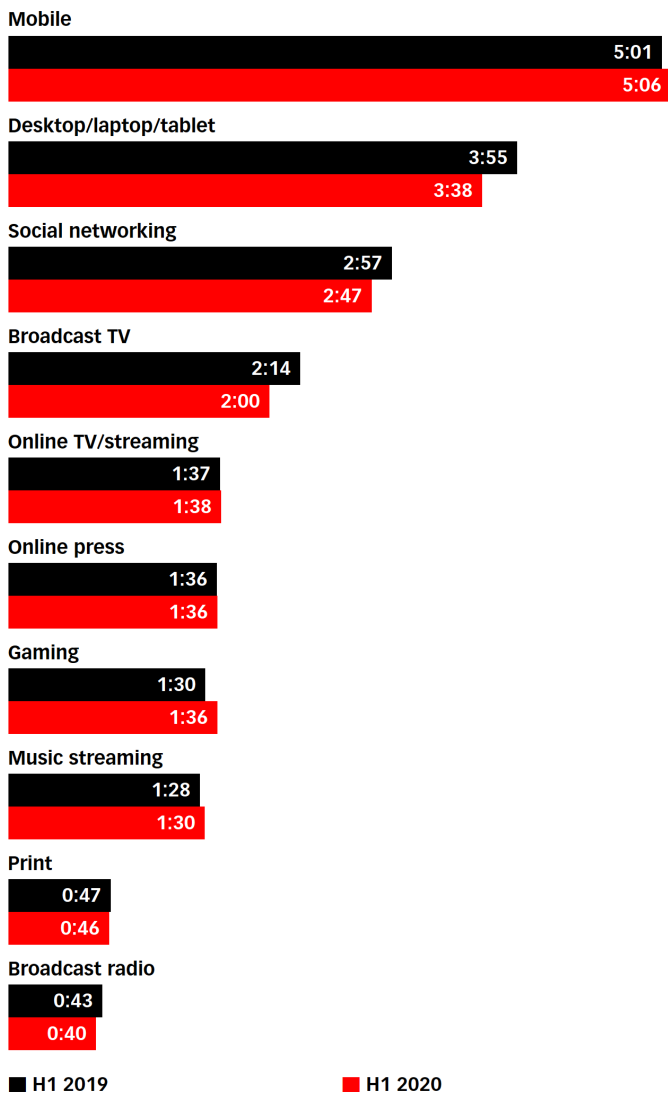
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20983

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Average Time Spent with Media in Thailand, H1 2019 & H1 2020

hrs:mins per day among internet users



Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

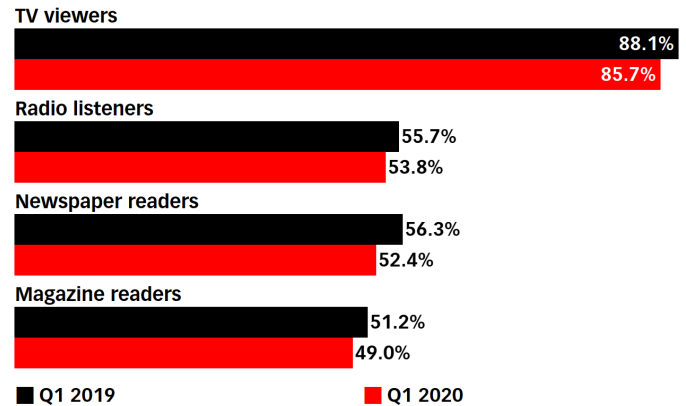
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20980

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Traditional Media Users in Thailand, Q1 2019 & Q1 2020

% of internet users



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20987

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Traditional Media Users in Thailand, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	47.2%	47.8%	52.0%	87.6%
Male	50.8%	57.0%	55.6%	83.7%
Age				
16-24	40.3%	42.1%	38.0%	73.3%
25-34	50.8%	53.2%	54.7%	87.1%
35-44	51.7%	56.9%	61.5%	91.9%
45-54	58.2%	64.9%	70.6%	93.7%
55-64*	-	-	-	-
Annual household income group				
High	64.8%	65.6%	69.4%	91.3%
Medium	44.3%	50.0%	51.0%	89.1%
Low	41.9%	44.7%	43.8%	80.0%
N/A**	23.7%	31.4%	34.6%	61.1%
Household location				
Urban	56.3%	60.0%	57.9%	88.2%
Suburban	42.3%	47.0%	54.8%	85.3%
Rural	34.6%	35.1%	38.2%	77.4%
Total	49.0%	52.4%	53.8%	85.7%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20986

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TV Viewers in Thailand, by Method, H1 2020

% of internet users

Broadcast live on TV channel

87.2%

TV channel's catch-up/on-demand service

72.2%

Recorded from TV

61.9%

SVOD*

56.8%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20988

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Video-on-Demand (VOD) Viewers in Thailand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	95.5%	94.8%
Male	92.4%	92.8%
Age		
16-24	96.3%	96.1%
25-34	95.9%	95.6%
35-44	94.7%	92.6%
45-54	88.3%	91.5%
55-64*	-	-
Annual household income group		
High	94.1%	94.3%
Medium	93.9%	93.3%
Low	95.9%	94.7%
N/A**	82.5%	86.0%
Household location		
Urban	95.1%	94.5%
Suburban	91.5%	93.7%
Rural	92.9%	91.9%
Total	93.9%	93.8%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20989

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Social Media Users in Thailand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	93.5%	94.7%
Male	93.0%	94.1%
Age		
16-24	92.3%	93.1%
25-34	93.8%	95.3%
35-44	93.8%	95.8%
45-54	94.6%	94.1%
55-64*	-	-
Annual household income group		
High	96.4%	96.2%
Medium	93.2%	95.3%
Low	90.8%	93.4%
N/A**	93.1%	89.8%
Household location		
Urban	94.0%	95.2%
Suburban	92.6%	93.8%
Rural	91.4%	93.0%
Total	93.2%	94.4%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20985

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Digital Audio Listeners in Thailand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	80.5%	82.9%
Male	78.3%	79.0%
Age		
16-24	90.7%	87.7%
25-34	82.5%	84.2%
35-44	72.6%	78.3%
45-54	67.2%	72.5%
55-64*	-	-
Annual household income group		
High	79.3%	82.7%
Medium	80.0%	79.0%
Low	82.9%	85.5%
N/A**	58.2%	62.3%
Household location		
Urban	81.3%	83.5%
Suburban	76.8%	78.7%
Rural	74.9%	76.9%
Total	79.4%	80.9%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20981

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Voice Search Users in Thailand, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	42.5%	44.2%
Male	45.6%	51.5%
Age		
16-24	49.8%	51.9%
25-34	51.1%	51.9%
35-44	41.6%	45.3%
45-54	32.9%	42.3%
55-64*	-	-
Annual household income group		
High	47.5%	52.1%
Medium	39.1%	46.6%
Low	45.4%	48.5%
N/A**	43.8%	36.2%
Household location		
Urban	45.2%	51.5%
Suburban	43.5%	44.0%
Rural	39.3%	42.5%
Total	44.0%	47.9%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20990

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TURKEY

KEY FEATURES

Data from Turkey continues to highlight behavior in a very young, urban population, where mobile is king.

- Smartphone ownership among internet users in Turkey was already close to 98% in H1 2019, according to GlobalWebIndex, and has effectively stabilized this year at 97.9%. PC penetration lags by some 25 percentage points but rose marginally to 72.3% this year. However, tablet penetration declined almost 6 percentage points to 47.3%.
- Time spent with mobile devices significantly outstripped time spent with desktops, laptops, and tablets. On average, internet users ages 16 to 64 spent 4 hours, 21 minutes (4:21) per day with mobile phones, compared with 3:35 on larger-screen devices. However, it's worth noting that both mobile and PC time rose between H1 2019 and H1 2020. In many other countries that GlobalWebIndex polled, PC time had fallen during that period.
- Smart TVs have a significant presence in Turkey, though penetration fell from 44.6% to 43.4% year over year (YoY). The devices were more popular among females and older adults, but respondents in affluent homes registered the highest penetration at 56.5%. Note that last year, more than 65% of internet users in that cohort owned a smart TV.
- Traditional media still command large audiences. Almost 92% of internet users polled in Q1 2020 had watched live TV in the prior month, and two-thirds had listened to broadcast radio. In fact, penetration of broadcast TV and radio were greater than in H1 2019. Print media is suffering, though. Readership of print newspapers and magazines dropped more than 7 percentage points YoY to 64.3% and 57.5%, respectively. Time spent figures mirror this disparity. In H1 2020, internet users spent a daily average of 2:18 with broadcast TV, compared with just 40 minutes reading print press, per GlobalWebIndex.



- Consumption of time-shifted TV content had changed little since 2019. Some 55.7% of respondents polled in H1 2020 had used a TV channel's catch-up or on-demand services to view programs, and 51.2% had watched TV shows they recorded earlier.
- By contrast, the share of internet users who watched TV or films via subscription video-on-demand (SVOD) services rocketed between H1 2019 and H1 2020, from 57.1% to 68.3%. In total, nearly 89% of respondents in Turkey had streamed free or paid-for TV, film, or other video content in the prior month, GlobalWebIndex reported.
- An estimated 92.0% of internet users were active on social media in the month prior to polling, and time spent on social accounted for more than 3 hours per day on average, according to internet users' own estimates. As in H1 2019, social media remained well ahead of broadcast TV in time spent.

In most respects, ownership of advanced digital devices has hardly changed since 2019.

- In H1 2020, the share of internet users in Turkey owning a smart home product—such as a remote-controlled security system—was essentially unchanged since H1 2019 at 16.1%. Females were more likely than males to own such devices, but that gap had narrowed YoY to 18.9% and 13.6%, respectively. Among the most well-to-do internet users, one in five owned a smart home device this year.
- Patterns of ownership for smartwatches were broadly similar. Overall, 15.2% of respondents owned one in H1 2020. Takeup of smart wristbands was lower at 8.9%. Again, penetration was higher among females and adults 35 to 44 and peaked among affluents (26.1%).
- Almost half (48.8%) of internet users polled in Turkey in H1 2020 had used voice search during the prior month. That share was above 50% among respondents ages 16 to 44 and those in affluent households.

Device Ownership in Turkey, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	97.6%	97.9%
Desktop/laptop	71.3%	72.3%
Tablet	53.0%	47.3%
Smart TV	44.6%	43.4%
Game console	21.7%	20.8%
Smart home device	16.0%	16.1%
Smartwatch	15.7%	15.2%
TV streaming stick/device	9.3%	9.5%
Smart wristband	6.5%	8.9%
Feature phone	7.0%	6.6%
VR headset/device	4.6%	5.0%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20581

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Smartphone and Tablet Owners in Turkey, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.2%	98.5%	58.8%	51.2%
Male	97.0%	97.3%	48.3%	43.8%
Age				
16-24	97.5%	98.2%	42.7%	35.5%
25-34	98.0%	98.0%	52.4%	45.4%
35-44	98.6%	98.7%	60.2%	59.3%
45-54	95.9%	98.6%	63.0%	57.2%
55-64*	-	-	-	-
Annual household income group				
High	99.4%	97.8%	73.8%	65.4%
Medium	97.5%	98.1%	55.0%	49.1%
Low	97.0%	97.5%	38.6%	33.4%
N/A**	94.6%	98.1%	38.1%	34.4%
Household location				
Urban	98.1%	97.9%	54.4%	49.0%
Suburban*	-	-	-	-
Rural*	-	-	-	-
Total	97.6%	97.9%	53.0%	47.3%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20995

www.eMarketer.com

Smart TV Owners in Turkey, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	49.7%	46.1%
Male	40.4%	41.1%
Age		
16-24	35.0%	36.3%
25-34	47.1%	44.9%
35-44	46.8%	47.5%
45-54	56.1%	44.0%
55-64*	-	-
Annual household income group		
High	65.3%	56.5%
Medium	43.9%	46.5%
Low	33.0%	33.4%
N/A**	30.5%	33.6%
Household location		
Urban	46.3%	44.5%
Suburban*	-	-
Rural*	-	-
Total	44.6%	43.4%

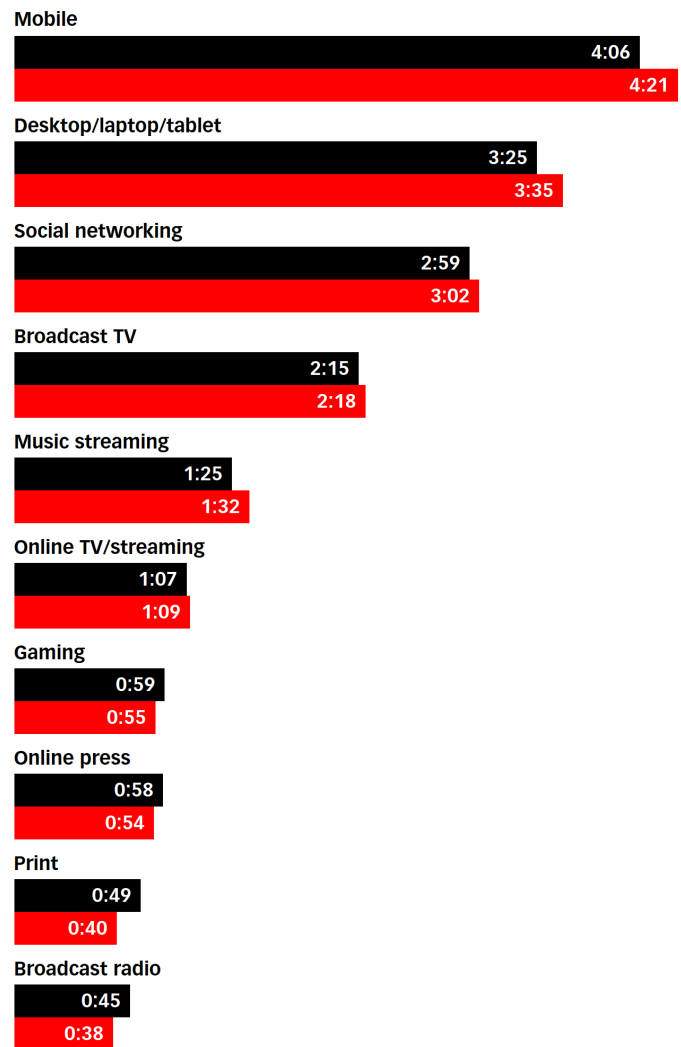
Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20994

www.eMarketer.com

Average Time Spent with Media in Turkey, H1 2019 & H1 2020

hrs:mins per day among internet users



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20991

www.eMarketer.com

Traditional Media Users in Turkey, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20998

www.eMarketer.com

Traditional Media Users in Turkey, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	54.4%	58.8%	61.9%	92.9%
Male	60.2%	69.0%	70.5%	93.3%
Age				
16-24	51.4%	44.9%	48.3%	87.0%
25-34	59.6%	65.1%	69.8%	95.3%
35-44	60.2%	75.2%	76.2%	94.6%
45-54	62.7%	77.0%	76.6%	99.0%
55-64*	-	-	-	-
Annual household income group				
High	69.4%	78.1%	75.6%	95.6%
Medium	57.6%	66.6%	69.3%	93.7%
Low	51.8%	57.3%	58.9%	91.4%
N/A**	43.9%	39.8%	55.7%	89.2%
Household location				
Urban	58.7%	66.0%	67.8%	93.9%
Suburban*	-	-	-	-
Rural*	-	-	-	-
Total	57.5%	64.3%	66.5%	93.1%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T20997

www.eMarketer.com

TV Viewers in Turkey, by Method, H1 2020

% of internet users

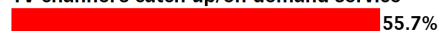
Broadcast live on TV channel



SVOD*



TV channel's catch-up/on-demand service



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often do you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20999

www.eMarketer.com

Video-on-Demand (VOD) Viewers in Turkey, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	85.5%	90.9%
Male	85.8%	87.3%
Age		
16-24	86.5%	91.4%
25-34	90.9%	89.6%
35-44	80.8%	88.8%
45-54	83.4%	83.2%
55-64*	-	-
Annual household income group		
High	88.9%	93.2%
Medium	85.2%	88.7%
Low	86.9%	84.2%
N/A**	69.6%	82.1%
Household location		
Urban	86.8%	89.7%
Suburban*	-	-
Rural*	-	-
Total	85.7%	88.9%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21000

www.eMarketer.com

Social Media Users in Turkey, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	88.9%	91.4%
Male	89.0%	92.5%
Age		
16-24	89.5%	91.4%
25-34	89.5%	92.1%
35-44	88.4%	93.2%
45-54	88.6%	91.5%
55-64*	-	-
Annual household income group		
High	94.9%	93.2%
Medium	88.2%	91.6%
Low	87.2%	92.0%
N/A**	80.5%	87.4%
Household location		
Urban	89.2%	92.2%
Suburban*	-	-
Rural*	-	-
Total	89.0%	92.0%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20996

www.eMarketer.com

Digital Audio Listeners in Turkey, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	75.3%	79.5%
Male	72.7%	78.1%
Age		
16-24	85.4%	90.5%
25-34	78.2%	78.8%
35-44	63.7%	76.7%
45-54	63.3%	67.5%
55-64*	-	-
Annual household income group		
High	80.3%	80.5%
Medium	70.4%	74.2%
Low	77.2%	77.4%
N/A**	57.1%	74.6%
Household location		
Urban	74.9%	78.9%
Suburban*	-	-
Rural*	-	-
Total	73.9%	78.7%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20992

www.eMarketer.com

Voice Search Users in Turkey, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	42.4%	47.7%
Male	51.1%	49.7%
Age		
16-24	57.0%	51.5%
25-34	48.3%	53.5%
35-44	46.7%	50.5%
45-54	33.0%	41.0%
55-64*	-	-
Annual household income group		
High	56.9%	55.3%
Medium	45.2%	47.6%
Low	47.1%	47.5%
N/A**	36.2%	41.7%
Household location		
Urban	48.4%	49.8%
Suburban*	-	-
Rural*	-	-
Total	47.2%	48.8%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21001

www.eMarketer.com

KEY FEATURES

The online population in UAE, like Saudi Arabia, is chiefly composed of archetypal early adopters with established digital habits.

- Males and city dwellers make up a large part of the online population in UAE. Given those skews, it's not surprising to find high levels of engagement with digital devices and activities.
- In H1 2020, the share of internet users owning a smartphone remained vastly greater than the share owning a PC at 97.1% versus 64.7%. Neither value had altered much since H1 2019. Some 37.0% of respondents owned a tablet—a decrease of nearly 3 percentage points year over year (YoY). Feature phone penetration dropped below 10% for the first time.
- Confirming the primacy of mobile activity, internet users spent an estimated 4 hours, 16 minutes per day (4:16) on average with mobile devices. Time spent with PCs and tablets was a full hour less at 3:16. In fact, PC and tablet time had decreased from H1 2019, while mobile time rose.
- Smart TV penetration also declined marginally to 37.3% in H1 2020. As in Turkey, there was a notable drop in ownership of smart TVs among internet users living in affluent households.
- All traditional media lost audience share in UAE between Q1 2019 and Q1 2020, according to GlobalWebIndex/Publicis Media. That said, broadcast media reached a large majority of internet users; 78.5% of those polled had watched TV in the prior month, and 63.9% had listened to radio programs. Print formats took the worst punishment, as in other countries. Penetration of print newspapers dropped more than 8 percentage points to 52.8%, while print magazine readership fell to 48.0%. Respondents in low- and high-income households were more likely to read either format than internet users in middle-income households.
- Daily time devoted to print newspapers and magazines lagged time spent with online press—at 1:02 to 1:30 on average, respectively—but both had increased YoY.

- Many people now listen to digital audio material, too. Younger internet users predominate in these audiences. More than three-quarters (77.2%) of respondents in UAE had streamed music, podcasts, or other digital audio content in the prior month, with more than 84% of 16- to 34-year-olds doing so. Intriguingly, affluents were no longer the income group most engaged with digital audio this year; instead, penetration was slightly higher among low-income respondents.
- Voice search continues to gain fans as well, though most of these still belong to typical early-adopter demographics. Among total respondents in H1 2020, 46.2% had used tools like Microsoft's Cortana or Apple's Siri in the prior month or used voice commands via a smart speaker or similar device. Usage exceeded 50% among respondents ages 16 to 34.

Respondents devoted almost as much time to online TV and music streaming as broadcast TV. But social media time exceeded them all.

- Online video viewing hasn't yet achieved the reach of live TV in UAE. While 83.3% of those polled had streamed video in the previous month, 88.8% had watched live TV. Similarly, the average time spent each day with digital video content (1:40) was marginally less than time spent with broadcast TV (1:42).
- More than two-thirds (67.9%) of respondents polled in H1 2020 had used TV broadcasters' catch-up or on-demand services in the prior month—a small increase since H1 2019—and 69.9% had watched TV programs, films, or other video content via subscription video-on-demand (SVOD) services like Netflix.
- Social networking continues to expand its audience as well, with penetration hitting 86.0% of those polled in H1 2020. Respondents spent a daily average of 3:11 with social platforms, per GlobalWebIndex. YouTube is included in this social category, which tends to boost penetration and time spent.

Device Ownership in the United Arab Emirates, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	98.3%	97.1%
Desktop/laptop	64.3%	64.7%
Smart TV	38.4%	37.3%
Tablet	39.7%	37.0%
Game console	18.4%	19.6%
Smartwatch	15.8%	16.9%
TV streaming stick/device	11.1%	11.0%
Feature phone	13.6%	9.2%
Smart wristband	8.7%	8.2%
Smart home device	9.6%	7.8%
VR headset/device	4.6%	5.0%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20578

www.eMarketer.com

Smartphone and Tablet Owners in the United Arab Emirates, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.5%	99.2%	44.0%	42.1%
Male	98.3%	96.5%	38.3%	35.4%
Age				
16-24	98.8%	97.7%	40.4%	34.5%
25-34	97.6%	96.7%	35.3%	32.5%
35-44	98.6%	97.3%	43.7%	38.9%
45-54	98.9%	96.9%	41.5%	47.4%
55-64*	-	-	-	-
Annual household income group				
High	98.3%	97.8%	51.5%	47.0%
Medium	98.6%	97.0%	38.7%	36.3%
Low	97.7%	95.8%	28.1%	31.0%
N/A**	99.4%	98.6%	33.2%	27.3%
Household location				
Urban	98.1%	97.0%	40.7%	37.5%
Suburban	99.1%	98.2%	39.8%	37.5%
Rural*	-	-	-	-
Total	98.3%	97.1%	39.7%	37.0%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21006

www.eMarketer.com

Smart TV Owners in the United Arab Emirates, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	42.8%	43.0%
Male	37.0%	35.4%
Age		
16-24	31.4%	32.2%
25-34	34.4%	35.5%
35-44	41.1%	38.8%
45-54	48.3%	42.3%
55-64*	-	-
Annual household income group		
High	52.6%	45.3%
Medium	38.9%	39.4%
Low	22.1%	29.8%
N/A**	31.1%	28.6%
Household location		
Urban	40.3%	39.8%
Suburban	37.5%	30.6%
Rural*	-	-
Total	38.4%	37.3%

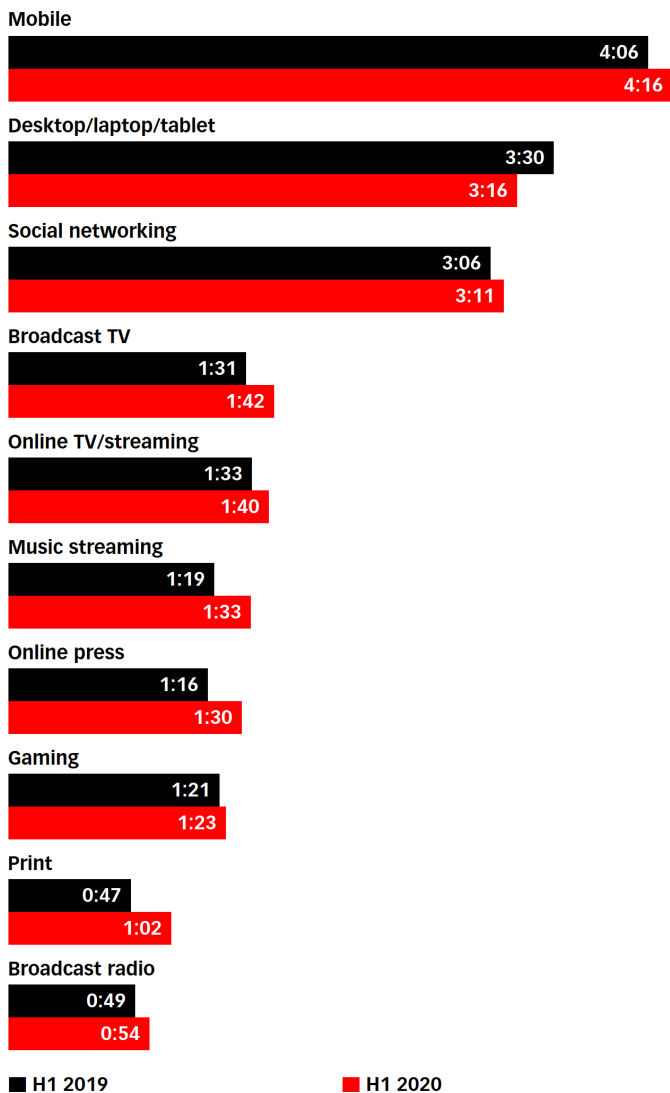
Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21005

www.eMarketer.com

Average Time Spent with Media in the United Arab Emirates, H1 2019 & H1 2020

hrs:mins per day among internet users



Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

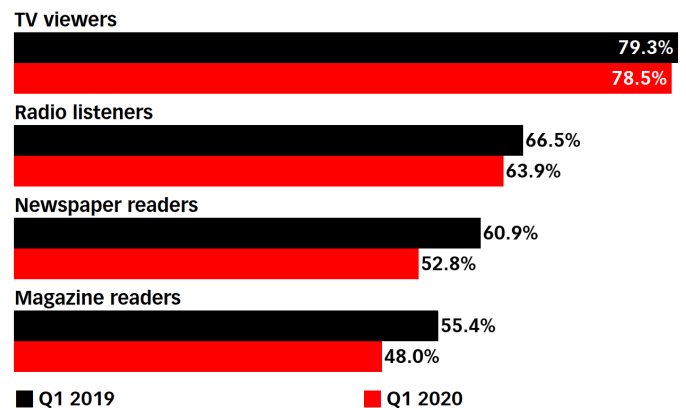
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21002

www.eMarketer.com

Traditional Media Users in the United Arab Emirates, Q1 2019 & Q1 2020

% of internet users



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T21009

www.eMarketer.com

Traditional Media Users in the United Arab Emirates, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	35.4%	48.3%	60.2%	85.2%
Male	52.0%	54.2%	65.1%	76.3%
Age				
16-24	45.7%	42.0%	49.4%	71.6%
25-34	49.6%	55.8%	65.3%	81.9%
35-44	50.8%	56.6%	72.4%	77.3%
45-54	41.4%	42.8%	53.0%	80.4%
55-64*	-	-	-	-
Annual household income group				
High	51.6%	59.1%	71.8%	85.2%
Medium	43.1%	48.5%	62.8%	77.8%
Low	53.4%	57.7%	59.1%	71.6%
N/A**	35.7%	31.0%	53.3%	75.4%
Household location				
Urban	48.7%	55.0%	63.3%	81.7%
Suburban	42.0%	46.7%	64.4%	76.0%
Rural*	-	-	-	-
Total	48.0%	52.8%	63.9%	78.5%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T21008

www.eMarketer.com

TV Viewers in the United Arab Emirates, by Method, H1 2020

% of internet users

Broadcast live on TV channel

88.8%

SVOD*

69.9%

TV channel's catch-up/on-demand service

67.9%

Recorded from TV

61.1%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often would you say you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21010

www.eMarketer.com

Video-on-Demand (VOD) Viewers in the United Arab Emirates, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	77.5%	86.8%
Male	83.5%	82.2%
Age		
16-24	86.9%	87.0%
25-34	84.9%	89.4%
35-44	78.5%	84.7%
45-54	80.6%	63.5%
55-64*	-	-
Annual household income group		
High	91.1%	85.4%
Medium	75.6%	83.6%
Low	81.7%	84.8%
N/A**	73.2%	72.8%
Household location		
Urban	83.1%	82.7%
Suburban	76.4%	80.5%
Rural*	-	-
Total	82.0%	83.3%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21011

www.eMarketer.com

Social Media Users in the United Arab Emirates, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	84.9%	84.1%
Male	84.7%	86.6%
Age		
16-24	84.9%	86.8%
25-34	86.2%	88.2%
35-44	86.3%	86.9%
45-54	77.6%	80.7%
55-64*	-	-
Annual household income group		
High	84.7%	87.8%
Medium	84.3%	85.3%
Low	85.8%	87.6%
N/A**	83.9%	79.8%
Household location		
Urban	84.3%	86.2%
Suburban	82.7%	85.7%
Rural*	-	-
Total	84.7%	86.0%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21007

www.eMarketer.com

Digital Audio Listeners in the United Arab Emirates, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	66.3%	78.8%
Male	77.3%	76.6%
Age		
16-24	81.0%	84.3%
25-34	84.7%	85.9%
35-44	67.7%	74.6%
45-54	62.6%	60.7%
55-64*	-	-
Annual household income group		
High	80.9%	77.3%
Medium	69.8%	78.3%
Low	78.2%	82.0%
N/A**	61.4%	62.5%
Household location		
Urban	76.6%	75.5%
Suburban	69.6%	78.8%
Rural*	-	-
Total	74.6%	77.2%

Note: services include Anghami, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21003

www.eMarketer.com

Voice Search Users in the United Arab Emirates, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	34.5%	39.9%
Male	46.2%	48.1%
Age		
16-24	52.0%	53.8%
25-34	47.0%	51.1%
35-44	41.3%	47.2%
45-54	39.5%	33.8%
55-64*	-	-
Annual household income group		
High	50.0%	49.4%
Medium	41.3%	46.4%
Low	42.7%	48.5%
N/A**	25.4%	31.3%
Household location		
Urban	45.3%	47.4%
Suburban	42.2%	40.0%
Rural*	-	-
Total	43.5%	46.2%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21012

www.eMarketer.com

UNITED KINGDOM

KEY FEATURES

The UK is an advanced digital market, where ownership of several digital devices has already reached a plateau.

- More than eight in 10 UK internet users ages 16 to 64 polled in H1 2020 owned a desktop or laptop, and 57.2% owned a tablet, per GlobalWebIndex. Compared with H1 2019, PC ownership declined slightly, while tablet ownership rose.
- Smartphone penetration climbed to 95.0% in the UK this year, from 92.6% in H1 2019. Interestingly, mobile was the only category in which the time spent figure increased from last year, according to GlobalWebIndex. Internet users in the UK spent an average 2 hours, 29 minutes (2:29) daily engaged with mobile in H1 2020. Yet PCs and tablets still claimed more than an hour more at 3:33.

- Smart TVs are still growing in popularity. Almost half (49.6%) of UK internet users polled in H1 2020 had such a device, compared with 45.1% in H1 2019. In affluent households, nearly 57% owned a smart TV this year.
- Smart home items are also gaining traction. Overall, the share of internet users who owned a smart home device—such as a web-enabled system designed to monitor household energy consumption—rose from 16.5% last year to 21.0% in H1 2020. Among respondents at the higher end of the income scale, that figure was 28.5%.
- At the same time, some devices may be losing momentum, at least among the online population as a whole. Penetration of smart wristbands inched up to just 13.1%, for example—though ownership was higher (16.5%) among female internet users. Only 12.5% of respondents owned a smartwatch, and penetration was no greater than 17.5% in any demographic. Penetration of gaming consoles fell year over year (YoY) from 39.2% to 36.8%.

There's tremendous momentum behind TV and video consumption.

- More than 87% of UK internet users polled in H1 2020 had watched live TV in the prior month, and the average daily time spent with broadcast TV was relatively high at 2:37. Like last year, more than two-thirds of respondents had viewed TV shows they recorded at the time of broadcast.
- In addition, a remarkable 83.1% of internet users had watched programs via broadcasters' catch-up or on-demand services, such as BBC iPlayer or ITV Hub. As in prior years, the UK registered one of the highest rates of catch-up TV viewing across the countries that GlobalWebIndex monitored. This is largely due to the BBC's pioneering role in providing access to TV shows after their live broadcasts, though the quality of programming also plays a part. However, it's still true that younger internet users are more likely to watch catch-up services, while older respondents tend to watch more live TV.

- The share of UK respondents viewing TV, films, or other video content via subscription video-on-demand (SVOD) services like Netflix or Amazon Prime Video also remains among the higher values recorded globally at 75.3%. Younger people were also in the lead here; 92.5% of internet users ages 16 to 24 had watched SVOD in the previous month. But penetration was up YoY in every demographic, including 55- to 64-year-olds (48.1%).
- Overall, usage of numerous viewing options and services boosted penetration of video-on-demand (VOD) to 90.0% in the UK this year—meaning that digital video viewing is more widespread among internet users than live TV viewing. As in H1 2019, respondents devoted 1:14 daily to streaming video content on average.

Device Ownership in the UK, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	92.6%	95.0%
Desktop/laptop	82.7%	80.2%
Tablet	56.8%	57.2%
Smart TV	45.1%	49.6%
Game console	39.2%	36.8%
TV streaming stick/device	27.6%	27.7%
Smart home device	16.5%	21.0%
Smart wristband	11.6%	13.1%
Smartwatch	9.6%	12.5%
Feature phone	5.8%	4.6%
VR headset/device	5.0%	4.2%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20579

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Smartphone and Tablet Owners in the UK, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	93.5%	95.5%	59.8%	59.1%
Male	91.7%	94.5%	53.7%	55.4%
Age				
16-24	95.9%	96.2%	45.4%	46.7%
25-34	94.3%	96.4%	53.5%	54.2%
35-44	94.4%	96.4%	60.9%	61.0%
45-54	91.8%	94.9%	61.8%	62.7%
55-64	85.6%	90.6%	62.2%	60.9%
Annual household income group				
High	94.5%	96.8%	64.5%	64.7%
Medium	94.6%	96.1%	59.5%	59.6%
Low	89.6%	92.5%	49.9%	48.9%
N/A*	92.0%	93.8%	52.4%	53.9%
Household location				
Urban	92.9%	95.2%	52.6%	51.9%
Suburban	93.0%	95.2%	58.4%	59.7%
Rural	91.1%	94.3%	61.3%	60.7%
Total	92.6%	95.0%	56.8%	57.2%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21017

www.eMarketer.com

Smart TV Owners in the UK, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	44.8%	49.4%
Male	45.5%	49.8%
Age		
16-24	36.7%	40.4%
25-34	45.7%	49.1%
35-44	48.3%	51.9%
45-54	47.0%	53.2%
55-64	47.9%	52.8%
Annual household income group		
High	53.3%	56.7%
Medium	49.8%	53.3%
Low	37.4%	41.0%
N/A*	37.7%	43.1%
Household location		
Urban	42.0%	44.7%
Suburban	46.9%	52.3%
Rural	47.0%	51.8%
Total	45.1%	49.6%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21016

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Average Time Spent with Media in the UK, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Broadcast TV



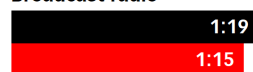
Mobile



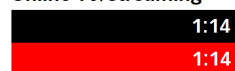
Social networking



Broadcast radio



Online TV/streaming



Music streaming



Gaming



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21013

www.eMarketer.com



Traditional Media Users in the UK, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Newspaper readers



Magazine readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T21020

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Traditional Media Users in the UK, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	47.8%	48.7%	79.9%	93.4%
Male	48.5%	56.2%	76.1%	89.7%
Age				
16-24	35.0%	39.2%	60.4%	83.3%
25-34	42.5%	46.9%	75.2%	88.0%
35-44	48.7%	53.9%	80.9%	92.5%
45-54	53.2%	56.6%	85.8%	96.0%
55-64	62.1%	66.7%	87.5%	97.9%
Annual household income group				
High	54.2%	59.9%	84.5%	94.2%
Medium	48.8%	53.1%	81.8%	92.4%
Low	43.5%	47.4%	69.8%	88.8%
N/A*	43.0%	44.4%	72.7%	89.6%
Household location				
Urban	49.7%	54.4%	70.5%	86.5%
Suburban	46.7%	51.9%	81.4%	94.2%
Rural	49.1%	50.4%	83.4%	94.0%
Total	48.1%	52.5%	78.0%	91.5%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T21019

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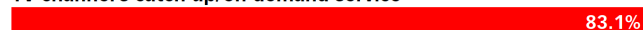
TV Viewers in the UK, by Method, H1 2020

% of internet users

Broadcast live on TV channel



TV channel's catch-up/on-demand service



SVOD*



Recorded from TV



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often would you say you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21021

www.eMarketer.com

Video-on-Demand (VOD) Viewers in the UK, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	87.6%	89.9%
Male	87.8%	90.1%
Age		
16-24	95.9%	97.0%
25-34	92.9%	94.5%
35-44	88.6%	90.3%
45-54	82.0%	87.1%
55-64	78.2%	80.3%
Annual household income group		
High	92.0%	94.7%
Medium	89.2%	90.9%
Low	83.8%	85.5%
N/A*	86.3%	86.7%
Household location		
Urban	88.8%	91.0%
Suburban	87.0%	89.7%
Rural	87.4%	89.0%
Total	87.7%	90.0%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21022

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Social Media Users in the UK, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	83.1%	86.2%
Male	81.4%	84.9%
Age		
16-24	86.1%	89.0%
25-34	84.6%	87.9%
35-44	82.9%	87.0%
45-54	80.7%	83.4%
55-64	76.1%	79.9%
Annual household income group		
High	84.8%	87.7%
Medium	83.3%	86.3%
Low	80.4%	83.9%
N/A*	78.8%	81.8%
Household location		
Urban	82.6%	86.2%
Suburban	82.3%	85.6%
Rural	81.2%	84.1%
Total	82.2%	85.5%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21018

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Digital Audio Listeners in the UK, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	60.2%	63.9%
Male	66.0%	69.8%
Age		
16-24	88.8%	89.5%
25-34	76.0%	80.4%
35-44	64.5%	67.6%
45-54	47.9%	55.3%
55-64	35.9%	39.6%
Annual household income group		
High	71.0%	73.7%
Medium	63.5%	66.1%
Low	57.5%	61.9%
N/A*	61.8%	64.4%
Household location		
Urban	70.3%	73.0%
Suburban	59.2%	64.8%
Rural	58.9%	60.9%
Total	63.1%	66.8%

Note: services include Amazon Music Unlimited, Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify, Tidal and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21014

www.eMarketer.com

Voice Search Users in the UK, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	26.0%	26.5%
Male	34.6%	35.0%
Age		
16-24	43.7%	44.6%
25-34	38.5%	37.2%
35-44	31.9%	32.9%
45-54	22.0%	23.2%
55-64	14.3%	14.6%
Annual household income group		
High	38.3%	36.0%
Medium	29.0%	29.9%
Low	27.1%	28.2%
N/A*	24.5%	25.4%
Household location		
Urban	36.3%	36.3%
Suburban	27.5%	28.1%
Rural	25.0%	26.9%
Total	30.3%	30.7%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21023

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KEY FEATURES

Smartphones, smart TVs, and smartwatches posted the only significant gains in device ownership in H1 2020.

- Smartphone ownership in the US is finally achieving a level one would expect in a leading digital nation. According to GlobalWebIndex, 94.9% of internet users ages 16 to 64 polled in H1 2020 owned a smartphone, compared with 91.9% in H1 2019.
- Smart TV ownership also climbed 3 percentage points to 46.2% of internet users this year. Yet the US does lag several other developed nations by this measure. In the UK, for example, 49.6% of respondents said they owned a smart TV in H1 2020; in Spain and Germany, those shares were 50.1% and 50.8%, respectively.
- Meanwhile, penetration of some key devices declined in the US between H1 2019 and H1 2020. The share of survey respondents who owned a desktop or laptop slipped from 78.5% to 76.6%, while tablet ownership dropped from 51.1% to 49.4%. This was a pattern repeated in numerous countries surveyed by GlobalWebIndex.
- Smartwatches did gain fans during the year, lifting penetration to 15.2% of internet users. More than 10% of respondents owned a smart wristband, and nearly 20% owned a smart home product, such as an energy consumption monitor. Affluent internet users and those ages 16 to 34 were most likely to own a smartwatch; affluents and suburbanites were most likely to have a smart home device.
- Several other digital devices seemed neither more nor less popular than in H1 2019. These included games consoles (cited by 38.8%) and TV streaming sticks (34.9%).

Digital video options have boosted engagement on all platforms, and subscription video services now rival broadcast TV in penetration.

- According to GlobalWebIndex, more than 60% of US internet users polled in H1 2020 had watched TV programs via broadcasters' catch-up or on-demand services in the prior month—a rise of nearly 5 percentage points. During the same period, 81.0% had used a subscription video-on-demand (SVOD) service, such as Netflix or Amazon Prime Video. As these and many other SVOD offerings first launched in the US, it's not surprising to see such high takeup.
- Greater consumption of digital video options boosted overall penetration of video streaming to 84.6% in H1 2020. Internet users spent an average 1 hour, 40 minutes (1:40) per day watching online TV and video—18 minutes more than in H1 2019. Time spent streaming audio had a marginally higher daily average (1:41) but was less popular (used by 75.1% of respondents).
- To date, widespread digital video viewing hasn't seriously threatened consumption of traditional TV, but that may be changing. In H1 2020, almost 82% of US internet users polled had watched live TV in the prior month—a share virtually unchanged since H1 2019, but barely higher than the 81.0% who watched SVOD. However, the average time devoted to broadcast TV per day was over 3 hours (3:03). Only time spent with PCs and tablets was greater at 4:08 daily. Meanwhile, time spent with mobile phones rose more than any other activity, to 3:01—and was on course to overtake broadcast TV.
- By contrast, print media continues to struggle. In Q1 2020, 43.1% of US respondents had read a print newspaper in the prior month; among 16- to 24-year-olds, just 32.0% had done so. Print magazines performed better, recording penetration of 47.6%. In both cases, usage was higher among men, older respondents, and those in better-off households.
- Penetration of broadcast radio also declined by a few percentage points between H1 2019 and H1 2020, but radio did reach a larger audience than audio streamed from digital sources, at 77.7% and 75.1% of internet users, respectively. Time spent with broadcast radio was 1:11 daily, on average—a lower level of engagement than all other activities, except online and print press.

- The share of US internet users engaging with social media rose by 4.5 percentage points year over year (YoY). Some 82.0% of respondents said they had used social networking sites or apps (including YouTube) in the prior month, and spent an average of 2:09 per day with social sites.

Device Ownership in the US, H1 2019 & H1 2020

% of internet users

	H1 2019	H1 2020
Smartphone	91.9%	94.9%
Desktop/laptop	78.5%	76.6%
Tablet	51.1%	49.4%
Smart TV	43.1%	46.2%
Game console	38.7%	38.8%
TV streaming stick/device	34.7%	34.9%
Smart home device	17.1%	18.9%
Smartwatch	12.8%	15.2%
Smart wristband	9.9%	10.8%
VR headset/device	5.2%	4.9%
Feature phone	4.9%	4.2%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20580

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Smartphone and Tablet Owners in the US, H1 2019 & H1 2020

% of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	93.1%	95.7%	53.8%	52.4%
Male	90.6%	94.1%	48.3%	46.5%
Age				
16-24	94.6%	95.9%	42.8%	37.1%
25-34	94.0%	96.1%	49.2%	49.1%
35-44	93.1%	96.5%	56.2%	55.9%
45-54	91.6%	94.8%	55.0%	54.7%
55-64	85.0%	90.9%	52.9%	50.8%
Annual household income group				
High	95.0%	97.1%	57.0%	57.0%
Medium	93.3%	95.9%	53.3%	52.5%
Low	88.7%	92.6%	44.9%	41.2%
N/A*	87.8%	91.6%	44.9%	40.2%
Household location				
Urban	92.5%	95.1%	46.1%	46.3%
Suburban	92.7%	95.6%	54.2%	51.5%
Rural	89.0%	93.0%	51.1%	49.0%
Total	91.9%	94.9%	51.1%	49.4%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21028

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Smart TV Owners in the US, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	42.6%	46.7%
Male	43.6%	45.8%
Age		
16-24	37.3%	38.1%
25-34	42.4%	46.1%
35-44	46.8%	50.1%
45-54	46.2%	50.0%
55-64	43.1%	47.3%
Annual household income group		
High	51.3%	52.0%
Medium	46.3%	50.1%
Low	34.9%	39.2%
N/A*	33.4%	36.8%
Household location		
Urban	40.7%	44.5%
Suburban	45.0%	47.7%
Rural	42.0%	45.4%
Total	43.1%	46.2%

Note: respondents were asked, "Which of the following devices do you own?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21027

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Average Time Spent with Media in the US, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Broadcast TV



Mobile



Social networking



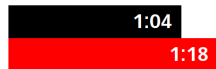
Music streaming



Online TV/streaming



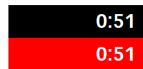
Gaming



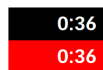
Broadcast radio



Online press



Print



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?" Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21024

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Traditional Media Users in the US, Q1 2019 & Q1 2020

% of internet users

TV viewers



Radio listeners



Magazine readers



Newspaper readers



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T21031

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Traditional Media Users in the US, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	45.4%	38.0%	80.1%	89.8%
Male	49.8%	48.2%	75.4%	86.5%
Age				
16-24	33.2%	32.0%	61.4%	77.8%
25-34	45.7%	41.4%	75.9%	85.1%
35-44	48.7%	44.3%	81.7%	90.2%
45-54	53.2%	46.3%	85.0%	93.4%
55-64	60.0%	53.8%	87.1%	96.3%
Annual household income group				
High	56.0%	51.2%	82.7%	90.8%
Medium	47.0%	43.3%	79.3%	89.0%
Low	43.3%	37.7%	73.3%	86.0%
N/A*	36.8%	36.1%	71.8%	83.8%
Household location				
Urban	51.8%	46.4%	73.3%	85.6%
Suburban	45.6%	41.1%	79.6%	89.5%
Rural	46.3%	43.0%	79.6%	88.6%
Total	47.6%	43.1%	77.7%	88.1%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *don't know/prefer not to say

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T21030

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TV Viewers in the US, by Method, H1 2020

% of internet users

Broadcast live on TV channel

81.7%

SVOD*

81.0%

TV channel's catch-up/on-demand service

60.3%

Recorded from TV

56.2%

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often would you say you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21032

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Video-on-Demand (VOD) Viewers in the US, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	80.0%	84.1%
Male	78.1%	85.0%
Age		
16-24	92.7%	93.3%
25-34	89.5%	92.2%
35-44	82.9%	88.9%
45-54	69.0%	79.2%
55-64	57.7%	66.7%
Annual household income group		
High	81.7%	87.2%
Medium	79.1%	85.2%
Low	77.9%	81.7%
N/A*	73.9%	82.2%
Household location		
Urban	84.3%	87.2%
Suburban	79.0%	84.9%
Rural	72.1%	79.9%
Total	79.1%	84.6%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Social Media Users in the US, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	79.4%	82.8%
Male	75.4%	81.3%
Age		
16-24	84.5%	85.9%
25-34	82.5%	85.0%
35-44	77.8%	83.8%
45-54	72.5%	80.2%
55-64	68.3%	74.3%
Annual household income group		
High	78.3%	83.5%
Medium	78.2%	82.2%
Low	77.3%	81.2%
N/A*	71.4%	78.7%
Household location		
Urban	79.7%	84.0%
Suburban	77.4%	81.9%
Rural	74.5%	79.4%
Total	77.5%	82.0%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21029

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Digital Audio Listeners in the US, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	72.3%	73.7%
Male	70.1%	76.5%
Age		
16-24	89.7%	90.3%
25-34	82.8%	86.2%
35-44	73.6%	77.6%
45-54	59.3%	65.8%
55-64	46.8%	52.1%
Annual household income group		
High	73.0%	77.0%
Medium	70.3%	74.4%
Low	70.0%	73.8%
N/A*	69.6%	75.4%
Household location		
Urban	77.7%	80.4%
Suburban	70.4%	74.9%
Rural	64.3%	67.9%
Total	71.2%	75.1%

Note: services include Amazon Music Unlimited, Amazon Prime Music, Apple Music, Audible, Deezer, Google Play Music, iHeartRadio, iTunes, Musify, Pandora, SoundCloud, Spotify, Tidal, YouTube Music and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21025

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Voice Search Users in the US, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	33.5%	37.5%
Male	36.6%	41.9%
Age		
16-24	46.1%	49.1%
25-34	42.3%	45.4%
35-44	35.8%	41.5%
45-54	28.5%	34.5%
55-64	21.9%	25.6%
Annual household income group		
High	39.1%	45.3%
Medium	34.3%	38.6%
Low	32.3%	35.5%
N/A*	31.0%	36.4%
Household location		
Urban	41.4%	46.0%
Suburban	34.0%	38.6%
Rural	28.5%	33.0%
Total	35.0%	39.7%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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VIETNAM

KEY FEATURES

Smartphones are central to Vietnam's emerging digital population. But wearables and smart home options have also seen modest adoption.

- Fully 97.6% of internet users ages 16 to 64 in Vietnam owned a mobile phone in H1 2020, according to GlobalWebIndex. That figure is marginally lower than the 98.2% recorded in H1 2019 but well within the bounds of statistical variation.
- As in many countries, PC ownership declined by a few percentage points in Vietnam in H1 2020, to 68.6%. Tablet penetration also fell from 33.9% to 27.9%. It's no surprise that tablet ownership may have peaked at barely one-third of internet users; Vietnam is a mobile-first country, where desktops, laptops, and tablets were not widely available or affordable until recently. Even this year, tablet owners were more likely to be living in urban areas and high-income households.

- Several other device types posted slightly lower numbers, too. A little more than 45% of respondents owned a smart TV this year, compared with 46.8% in H1 2019. Just 12.1% owned a smart home product, such as a system enabling users to monitor their home security remotely via a mobile app. Smartwatch penetration had increased marginally, however, to 16.4%. All these devices were more common among 25- to 44-year-olds and affluents.
- Penetration of gaming consoles rose but remained notably low at 9.4% overall. Ownership was greatest among respondents in middle- and high-income homes.

More internet users now engage with digital video and audio than with broadcast TV and radio.

- Some 85.1% of internet users ages 16 to 64 had watched live TV in the month prior to polling in H1 2020; the time spent with broadcast TV rose to 1 hour, 26 minutes (1:26) per day on average. But alternative viewing options have extended their reach since the 2019 survey. This year, 75.4% of respondents said they had watched TV shows via broadcasters' catch-up or on-demand services, for example.
- More consumers in Vietnam are logging in to subscription video-on-demand (SVOD) services like Netflix, too. In H1 2020, 62.3% of internet users polled had used SVOD to watch TV programs, films, and other video content in the previous month, compared with 56.2% in H1 2019.
- Thanks to the expansion of time-shifted and digital viewing options, overall adoption of video-on-demand (VOD) stood at 84.0% of internet users in H1 2020. Respondents spent a daily average of 1:14 with online TV/streaming options.
- Fully 93.5% of respondents had also listened to digital audio content (such as music, podcasts, or audiobooks) in the month prior to polling this year—a leap of 15.5 percentage points year over year (YoY). Music streaming accounted for an average 1:04 per day. More people were listening to radio as well; 49.5% of internet users had tuned in to broadcast radio in the previous month, compared with 44.3% last year. Yet the 34 minutes spent with live radio per day was only about half the time spent with digital audio.

- More than 61% of internet users had read a print newspaper in the prior month, and 57.7% had read a print magazine. Female respondents and urban dwellers were more likely to read either format. The time spent with online press (1:08 daily, on average) was substantially higher than the 43 minutes devoted to print press, though both had risen YoY.
- Respondents ages 35 to 44 were the leading consumers of all traditional media.

Device Ownership in Vietnam, H1 2019 & H1 2020 % of internet users

	H1 2019	H1 2020
Smartphone	98.2%	97.6%
Desktop/laptop	70.5%	68.6%
Smart TV	46.8%	45.3%
Tablet	33.9%	27.9%
Smartwatch	15.0%	16.4%
Feature phone	20.9%	15.3%
Smart home device	12.7%	12.1%
Game console	8.8%	9.4%
TV streaming stick/device	11.2%	9.1%
Smart wristband	7.7%	8.4%
VR headset/device	4.1%	3.3%

Note: ages 16-64; respondents were asked, "Which of the following devices do you own?"

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T20582

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Smartphone and Tablet Owners in Vietnam, H1 2019 & H1 2020 % of internet users, by demographic

	Smartphone		Tablet	
	H1 2019	H1 2020	H1 2019	H1 2020
Gender				
Female	98.3%	98.3%	36.7%	27.7%
Male	98.2%	97.0%	31.3%	28.1%
Age				
16-24	98.4%	96.7%	26.9%	21.7%
25-34	99.0%	97.4%	36.1%	28.9%
35-44	99.3%	98.4%	39.7%	33.2%
45-54*	-	-	-	-
55-64*	-	-	-	-
Annual household income group				
High	98.1%	98.1%	46.6%	50.6%
Medium	98.8%	98.9%	36.4%	32.8%
Low	98.4%	92.2%	26.2%	20.5%
N/A**	95.1%	94.9%	15.8%	10.4%
Household location				
Urban	98.1%	98.5%	42.4%	35.2%
Suburban	98.9%	96.3%	21.2%	14.5%
Rural	97.7%	96.5%	21.2%	21.3%
Total	98.2%	97.6%	33.9%	27.9%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Smart TV Owners in Vietnam, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	48.2%	44.5%
Male	45.5%	46.2%
Age		
16-24	38.0%	38.7%
25-34	47.8%	44.7%
35-44	53.3%	50.7%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	60.6%	54.2%
Medium	50.4%	53.7%
Low	37.7%	29.9%
N/A**	26.7%	27.8%
Household location		
Urban	51.4%	50.4%
Suburban	40.9%	35.0%
Rural	38.7%	42.4%
Total	46.8%	45.3%

Note: respondents were asked, "Which of the following devices do you own?"; *omitted due to small sample size; **don't know/prefer not to say
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Average Time Spent with Media in Vietnam, H1 2019 & H1 2020

hrs:mins per day among internet users

Desktop/laptop/tablet



Mobile



Social networking



Broadcast TV



Online TV/streaming



Gaming



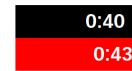
Online press



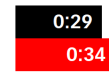
Music streaming



Print



Broadcast radio



■ H1 2019

■ H1 2020

Note: ages 16-64; respondents select a period of time (ranging from <30 minutes up to 10 hours), with GWI then averaging these figures; the averages also include those who selected "do not use"; respondents were asked, "Roughly how many hours do you spend on x during a typical day?"
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Traditional Media Users in Vietnam, Q1 2019 & Q1 2020

% of internet users

TV viewers



Newspaper readers



Magazine readers



Radio listeners



■ Q1 2019

■ Q1 2020

Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

T21042

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Traditional Media Users in Vietnam, Q1 2020

% of internet users, by demographic

	Magazine readers	Newspaper readers	Radio listeners	TV viewers
Gender				
Female	61.6%	63.2%	50.5%	86.6%
Male	54.2%	59.4%	48.5%	78.1%
Age				
16-24	44.8%	45.4%	33.2%	78.5%
25-34	67.1%	71.1%	56.0%	86.3%
35-44	72.9%	76.8%	66.2%	88.3%
45-54*	-	-	-	-
55-64*	-	-	-	-
Household location				
Urban	62.1%	65.2%	52.7%	88.2%
Suburban	49.6%	56.5%	45.1%	68.8%
Rural	52.4%	53.6%	43.7%	77.6%
Total	57.7%	61.2%	49.5%	82.1%

Note: combined responses for used in the past 7 days and past 30 days; respondents were asked, "When was the last time you did each of the following things?"; *omitted due to small sample size

Source: GlobalWebIndex/Publicis Media, Q1 2020, August 2020

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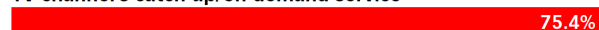
TV Viewers in Vietnam, by Method, H1 2020

% of internet users

Broadcast live on TV channel



TV channel's catch-up/on-demand service



Recorded from TV



SVOD*



Note: ages 16-64; combined responses for used in the past 7 days and past 30 days; respondents were asked, "Thinking about television, how often would you say you do the following?"; *subscription services, e.g., Netflix
Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

T21043

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Video-on-Demand (VOD) Viewers in Vietnam, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	85.7%	83.5%
Male	86.8%	84.4%
Age		
16-24	86.0%	84.1%
25-34	87.3%	87.3%
35-44	83.3%	75.9%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	85.2%	70.4%
Medium	86.3%	83.4%
Low	90.5%	88.3%
N/A**	65.0%	69.5%
Household location		
Urban	84.8%	83.0%
Suburban	92.2%	87.8%
Rural	86.3%	82.9%
Total	86.3%	84.0%

Note: used at least one service in the past month via any device; services include local, regional VOD services and/or Amazon Prime Video, Google Play, iTunes, Netflix, Vimeo, others; respondents were asked, "In the last month, which of these services have you used to watch/download TV shows, films or videos? Please think about any sort of TV, video or film content that you have watched, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Social Media Users in Vietnam, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	91.6%	91.1%
Male	90.5%	91.7%
Age		
16-24	89.1%	92.3%
25-34	91.7%	93.0%
35-44	94.1%	87.8%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	91.7%	89.9%
Medium	90.8%	88.6%
Low	91.6%	91.1%
N/A**	86.8%	86.2%
Household location		
Urban	91.5%	92.0%
Suburban	92.8%	93.1%
Rural	87.1%	86.0%
Total	91.0%	91.4%

Note: actively engaged with or contributed to at least one service in the past month via any device; services include Facebook, Facebook Messenger, Instagram, Line, LinkedIn, Pinterest, reddit, Sina Weibo, Skype, Slack, Snapchat, Tencent Weibo, Twitch, Twitter, WeChat, WhatsApp, YouTube, Zalo and/or other; respondents were asked, "Which (of the following services) have you actively engaged with or contributed to in the past month via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Digital Audio Listeners in Vietnam, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	75.8%	92.2%
Male	80.0%	94.7%
Age		
16-24	78.3%	94.7%
25-34	75.3%	95.6%
35-44	72.4%	87.7%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	81.8%	86.1%
Medium	76.2%	97.0%
Low	80.4%	96.1%
N/A**	51.6%	90.6%
Household location		
Urban	80.5%	92.6%
Suburban	77.5%	97.1%
Rural	70.4%	92.3%
Total	78.0%	93.5%

Note: services include Apple Music, Audible, Deezer, Google Play Music, iTunes, Musify, SoundCloud, Spotify and/or others; respondents were asked, "In the last month, which of these services have you used to listen to/download music, radio or audiobook content? Please think about any sort of music, radio or audiobook content that you have listened to, streamed, downloaded or accessed in any other way."; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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Voice Search Users in Vietnam, H1 2019 & H1 2020

% of internet users, by demographic

	H1 2019	H1 2020
Gender		
Female	36.0%	25.5%
Male	42.3%	25.6%
Age		
16-24	39.5%	22.4%
25-34	39.8%	27.4%
35-44	39.5%	24.1%
45-54*	-	-
55-64*	-	-
Annual household income group		
High	45.8%	48.7%
Medium	39.0%	57.2%
Low	34.8%	36.5%
N/A**	30.6%	31.7%
Household location		
Urban	40.1%	25.9%
Suburban	42.6%	27.1%
Rural	33.5%	21.8%
Total	39.2%	25.6%

Note: respondents were asked, "In the past month, have you used voice search or voice command tools (e.g., Siri, Cortana) on the internet via any device?"; *omitted due to small sample size; **don't know/prefer not to say

Source: GlobalWebIndex, Q1-Q2 2019 & Q1-Q2 2020, August 2020

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