The Multi-Screen Landscape

A closer look at device usage – from browsing to buying, how are we using our online devices?

We asked 1,000 respondents in the US, UK, France, Germany, Australia and Singapore for their opinions about device usage and Internet access - here are the results...
Rise of smartphone addiction leads to love-hate relationship for US consumers

The Multi-Screen Landscape

Recently, Toluna ran a Toluna Omnibus™ study asking 1,000 respondents in the US, UK, France, Germany, Australia and Singapore for their opinions about device usage and Internet access. Click here to view global data.

How are people in the US using devices?

We’re ‘always on’

66% of people keep their phone by their bed

65% check their phone 15 minutes prior to waking/going to bed

37% check their phone at night

More happy than stressed

76% see technology as a form of stress

84% see technology as a form of happiness

24% feel this weekly

34% feel this weekly

Which device are you most likely to use for the following activities?

Browsing the internet

Accessing Video/TV

Do you find yourself using multiple screens?

What devices lend themselves to multitasking, and what devices are used?
Over two-thirds of UK smartphone users check their device before getting up in the morning – and more information about device usage

The Multi-Screen Landscape

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How are people in the UK using devices?

- **News**
  - Smartphone: 53%
  - Laptop: 57%
- **Searching Contacts**
  - Smartphone: 47%
- **Weather**
  - Smartphone: 42%
- **Music**
  - Smartphone: 41%
- **Price Compare**
  - Tablet: 55%
- **Online banking**
  - Tablet: 51%
- **Browsing products**
  - Tablet: 50%
- **Product Research**
  - Tablet: 56%
- **Banking**
  - Tablet: 55%
- **Price Compare**
  - Tablet: 54%
- **Games**
  - Tablet: 45%
- **Twitter**
  - Tablet: 34%

Which device are you most likely to use for the following activities?

**Browsing the internet**

- **Overall (18+)**
  - 39%
  - 51%
- **Younger (18-34)**
  - 21%
  - 70%

**Accessing Video/TV**

- **Overall (18+)**
  - 21%
  - 20%
  - 13%
- **Younger (18-34)**
  - 63%

Do you find yourself using multiple screens?

What devices lend themselves to multitasking, and what devices are used?

**Watching TV**

- 21% Are also using a Laptop
- 20% Are also using a Tablet
- 13% Are also using a Smartphone

**Using a Tablet**

- 63% Are relaxing at home or doing nothing else

**Using a Laptop**

- 61% Are relaxing at home or doing nothing else

We’re ‘always on’ – Brits even more so than US – especially when you see how they check email before bed!

- **66%** of people keep their phone by their bed
- **70%** check their phone 15 minutes prior to waking/going to bed
- **32%** check their phone at night

More happy than stressed

- 77% see technology as a form of stress
  - 21% feel this weekly
- 85% see technology as a form of happiness
  - 39% feel this weekly

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The Multi-Screen Landscape

A closer look at device usage in France – from browsing to buying, how are we using our online devices?

Recently, Toluna ran a Toluna Omnibus™ study asking 1,000 respondents in the US, UK, France, Germany, Australia and Singapore for their opinions about device usage and Internet access. Click here to view global data.

How are people in France using devices?

<table>
<thead>
<tr>
<th>Device</th>
<th>News</th>
<th>Price Compare</th>
<th>Navigation</th>
<th>Browsing products</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
<td>66%</td>
<td>61%</td>
<td>58%</td>
<td>57%</td>
</tr>
<tr>
<td>LAPTOP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMARTPHONE</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>TABLET</td>
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</tr>
</tbody>
</table>

TV remains the most common form of media interaction

% of people that spend 3+ hours on...

- 66%
- 64%
- 62%
- 60%
- 58%
- 56%
- 54%
- 52%
- 50%
- 48%
- 46%
- 44%
- 42%
- 40%
- 38%
- 36%
- 34%
- 32%
- 30%
- 28%
- 26%
- 24%
- 22%
- 20%
- 18%
- 16%
- 14%
- 12%
- 10%
- 8%
- 6%
- 4%
- 2%
- 0%

INSIGHT:
TV viewers – 46% report seeing more than 20 ads/day.
Of those that spend 3+ hours online/day 43% see more than 20 ads/day.

Do you find yourself using multiple screens?

What devices lend themselves to multitasking, and what devices are used?

- 50% are using several devices simultaneously
  - Using desktop computer
  - Watching TV
  - Using another device simultaneously
  - Using their tablet
  - Using their smartphones

French people understand that they need to logoff at night!

- 51% of people keep their phone by their bed, against 80% of people under 35 check their phone at night

Laptops and computers are the devices most likely to be used to access the Internet

Devices Used to Access the Internet

- 100%
- 80%
- 60%
- 40%
- 20%
- 0%

INSIGHT:
The gap is even bigger when looking at daily usage.

Source of stress and happiness

- 71% see technology as a form of stress
  - 22% feel this weekly
- 72% see technology as a form of happiness
  - 24% feel this weekly
The Multi-Screen Landscape

A closer look at device usage in Germany – from browsing to buying, how are we using our online devices?

Recently, Toluna ran a Toluna Omnibus™ study asking 1,000 respondents in the US, UK, France, Germany, Australia and Singapore for their opinions about device usage and Internet access. Click here to view global data.

How are people in Germany using devices?

<table>
<thead>
<tr>
<th>Device</th>
<th>News</th>
<th>Banking</th>
<th>Price Compare</th>
<th>Product Reviews</th>
<th>Researching Products</th>
<th>News</th>
<th>Weather</th>
<th>Twitter</th>
<th>Kontakte suchen</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
<td>73%</td>
<td>66%</td>
<td>64%</td>
<td>59%</td>
<td>72%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LAPTOP</td>
<td></td>
<td></td>
<td>58%</td>
<td>52%</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMARTPHONE</td>
<td></td>
<td></td>
<td>77%</td>
<td>67%</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>TABLET</td>
<td></td>
<td></td>
<td>51%</td>
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</tr>
</tbody>
</table>

The Internet has become the most common form of media interaction

% of people that spend 3+ hours on...

- 56% Internet
- 55% TV
- 54% News
- 53% Banking
- 52% Price Compare
- 51% Product Reviews
- 50% Researching Products
- 49% Weather
- 48% Games
- 46% Tweets
- 45% Videos

INSIGHT:

TV viewer - 28% report seeing more than 20 ads/day.
36% see more than 20 ads/day on the Internet.

Do you find yourself using multiple screens?

- Watching TV
  - 5% are using their smartphone
  - 9% are using their tablet

INSIGHT:

Compared to their European neighbors, German people are not really multi-screeners.

German people like to logoff at night!

- 47% of people keep their phone by their bed
- 18% check phone at night

More happy than stressed

- 92% see technology as a form of happiness
- 77% see technology as a form of stress

INSIGHT:

Interestingly, when looking at daily usage, we notice that the gap is reducing. German people use more and more their smartphone to access the Internet.
Smartphones first: 69% of Aussies check their Smartphone upon waking up

Recently, Toluna ran a Toluna Omnibus™ study asking 1,000 respondents in the US, UK, France, Germany, Australia and Singapore for their opinions about device usage and Internet access. Click here to view global data.

How are people in Australia using devices?

<table>
<thead>
<tr>
<th>Device</th>
<th>Search Contacts</th>
<th>Banking</th>
<th>Twitter</th>
<th>Weather/Games</th>
<th>News/Music</th>
<th>Compare Prices</th>
<th>Browsing Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>57%</td>
<td>46%</td>
<td>44%</td>
<td>43%</td>
<td>42%</td>
<td>58%</td>
<td>56%</td>
</tr>
<tr>
<td>Laptop</td>
<td>61%</td>
<td>56%</td>
<td>49%</td>
<td>46%</td>
<td>58%</td>
<td>56%</td>
<td>48%</td>
</tr>
<tr>
<td>PC</td>
<td>61%</td>
<td>56%</td>
<td>49%</td>
<td>46%</td>
<td>58%</td>
<td>56%</td>
<td>48%</td>
</tr>
</tbody>
</table>

INSIGHT: Australians use smartphones primarily to search for contacts, which is different from all other countries!

Watching TV is still the most favorite activity for Australia!

% of people that spend 3+ hours on...

- TV: 39% report seeing more than 20 ads/day (TV).
- Internet: 29% see more than 20 ads/day (Internet).

Do you find yourself using multiple screens?
What devices lend themselves to multitasking, and what devices are used?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Using a Smartphone</th>
<th>Using a Tablet</th>
<th>Using a PC</th>
<th>Using a Laptop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working</td>
<td>13%</td>
<td>21%</td>
<td>43%</td>
<td>30%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>15%</td>
<td></td>
<td>43%</td>
<td></td>
</tr>
</tbody>
</table>

PC & Laptops have the highest level of engagement.

Australians are addicted to phones as well!

- 62% of people keep their phone by their bed
- 69% check their phone 15 minutes prior to waking/going to bed
- 29% check their phone at night

Smartphones are the device most likely to be used to access the Internet

INSIGHT: Interestingly, when looking at how often the devices are used, the gap between Laptop and Smartphone is smaller.

75% see technology as a form of stress

84% see technology as a form of happiness

22% feel this weekly

37% feel this weekly
Sleepless without smartphones - Singapore consumers are ‘always on’

Recently, Toluna ran a Toluna Omnibus™ study asking 1,000 respondents in the US, UK, France, Germany, Australia and 500 respondents in Singapore for their opinions about device usage and Internet access. Click here to view global data.

How are people in Singapore using devices?

<table>
<thead>
<tr>
<th>Device</th>
<th>News</th>
<th>Searching Contacts</th>
<th>Music</th>
<th>Online Banking</th>
<th>Videos</th>
<th>Twitter</th>
<th>Games</th>
<th>Videos</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMARTPHONE</td>
<td>66%</td>
<td>61%</td>
<td>57%</td>
<td>65%</td>
<td>51%</td>
<td>47%</td>
<td>45%</td>
<td>52%</td>
<td>46%</td>
</tr>
<tr>
<td>LAPTOP</td>
<td>63%</td>
<td>52%</td>
<td>46%</td>
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<td>54%</td>
<td>47%</td>
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<tr>
<td>PC</td>
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</tr>
</tbody>
</table>

More people are online than watching TV!

% of people that spend 3+ hours on...

<table>
<thead>
<tr>
<th>Time on TV</th>
<th>Time on Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>50%</td>
</tr>
<tr>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>40%</td>
<td>30%</td>
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<td>30%</td>
<td>20%</td>
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<tr>
<td>20%</td>
<td>10%</td>
</tr>
</tbody>
</table>

INSIGHT:
12% report seeing more than 20 ads/day (TV).
31% see more than 20 ads/day (Internet).

Do you find yourself using multiple screens?
What devices lend themselves to multitasking, and what devices are used?

73% of respondents report using other devices at the same time

- Working: 17% are using a Smartphone
- Using a tablet: 10% are watching TV

Singaporeans are the most plugged in!

- 75% of people keep their phone by their bed
- 82% check their phone 15 minutes prior to waking/going to bed
- 47% check their phone at night

Smartphones are the device most likely to be used to access the Internet

Devices Used to Access the Internet

- Daily
  - Laptop: 100%
  - Smartphone: 76%

INSIGHT:
In Singapore Smartphones are more likely to be on.

76% see technology as a form of stress
91% see technology as a form of happiness
21% feel this weekly
34% feel this weekly

Toluna in touch with people
www.toluna-group.com