

A photograph of five diverse individuals sitting on a brown leather couch. From left to right: a woman with short blonde hair wearing a red headband and headphones, looking at a laptop; a man with a beard and glasses wearing large black headphones and a maroon shirt, looking at a smartphone; a man with short brown hair wearing a striped sweater and earbuds, looking at a smartphone; a woman with long dark hair wearing blue headphones and a green shirt, looking at a smartphone; and a woman with curly dark hair wearing pink headphones and a yellow sweater, looking at a smartphone. The background is a plain, light-colored wall.

# MEDIA HABITS RESEARCH

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TOPLINE REPORT | September 2018

# Research Background and Goals

## Research background

Consumers' media consumption habits continue to evolve in reaction to the proliferation of devices, services, social media channels, and other new media touchpoints.

## Research goals

The goal of this research is to provide a deeper understanding of media consumption and how it is evolving.

- Gain insights into consumers' engagement with different types of media content, including where and on what devices content is consumed
- Understand how media behaviors are changing over time
- Gauge the frequency of engaging with a wide range of media touchpoints, including key differences by country

This report presents a summary of findings from quantitative research on Media Habits in **Brazil, Canada, China, Croatia, France, Greece, Hungary, India, Japan, Korea, Philippines, Romania, Thailand, Turkey, and the US**

The study was carried out in July and August 2018.

## Research methodology

- 15 minute online survey
- N=500 per country
- Age 18+ -balanced by gender/age

# Key Findings

+ The smartphone arguably has the greatest impact on how people interact with different types of media content.

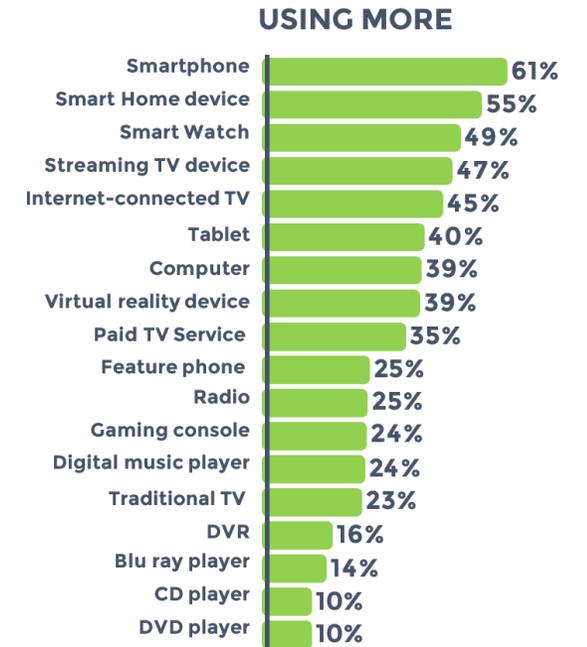
- + Most people report owning a smartphone and use it daily.
- + Six in ten use their smartphone more than they did a year ago.
- + Smartphones are being used for a variety of media, mainly news/information, social media, music and user generated videos.
- + Over half of people are using a smartphone to access all types of media more than they were a year ago.

+ “Newer” types of devices (e.g. virtual reality, smart home device, smart watch, streaming device) are still used very little globally, but most are being used more than a year ago overall.

- + Six out of ten smart home device owners report using their device daily.
- + About half of the owners of these devices are using a smart home device, smart watch or streaming device more often versus a year ago.
- + These types of devices are being used much more to access media such as news, social media and music.

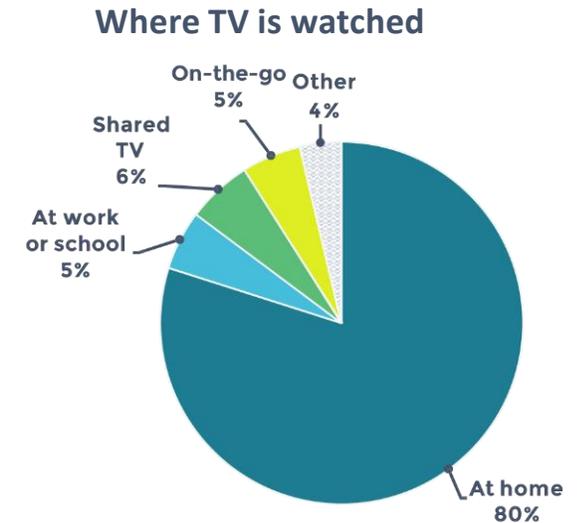
+ Other devices are replacing disc players (e.g. Blu-ray, DVD, CD) to access media more traditionally associated with these devices.

- + Disc players are being used less versus last year by about a third of owners.
- + Nearly half of CD player owners are using their CD player less for music compared to last year.
- + Half of DVD player owners and over one-third of Blu-ray player owners are using their device less to play movies than a year ago.



# Key Findings

- + TV and movie viewing tend to be at-home, solitary events.
  - + The majority of people are watching TV programs and full length movies at home versus other places.
  - + More than half the time people are watching alone rather than with others.
- + Movie pirating is fairly strong globally.
  - + Two-thirds have ever accessed a pirated copy of a movie.
  - + Most of the pirated movie access comes via a streaming website or a download from a peer-to-peer network.



# Conclusion

- + Media consumption is changing. New ways to access media content are supplanting more traditional methods of accessing content.
  - + The smartphone is one of the primary ways to access most media content and people report using their smartphone to access most content much more than they did a year ago.
  - + People report much greater use of some of the newest types of multi-media devices (smart watch, smart home device, streaming TV device) versus a year ago.
  - + More “traditional” media access points (e.g. disc players, newspapers and magazines) are generally being used less to access content they would typically be associated with (e.g. news and information, music, sports, TV programs, movies).

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