

Media Access and Usage around the World

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Outline

GOALS

- Focus on core measures of media access, usage and interest.
- Global access trends - Gallup World Poll
- Media use for news & info and interests - IARP

Methods - Data

Platforms

- TV
- Radio
- Internet
- Mobile

Topics of Interest

Media Freedom

Methodology

- Gallup World Poll (2006-2013)
 - 164 countries, 1.3 million respondents, 1,000-4,000 interviews per country
- IARP (2012-2014)
 - 38 countries, 84,176 respondents, 1,400-5,000 interviews/country

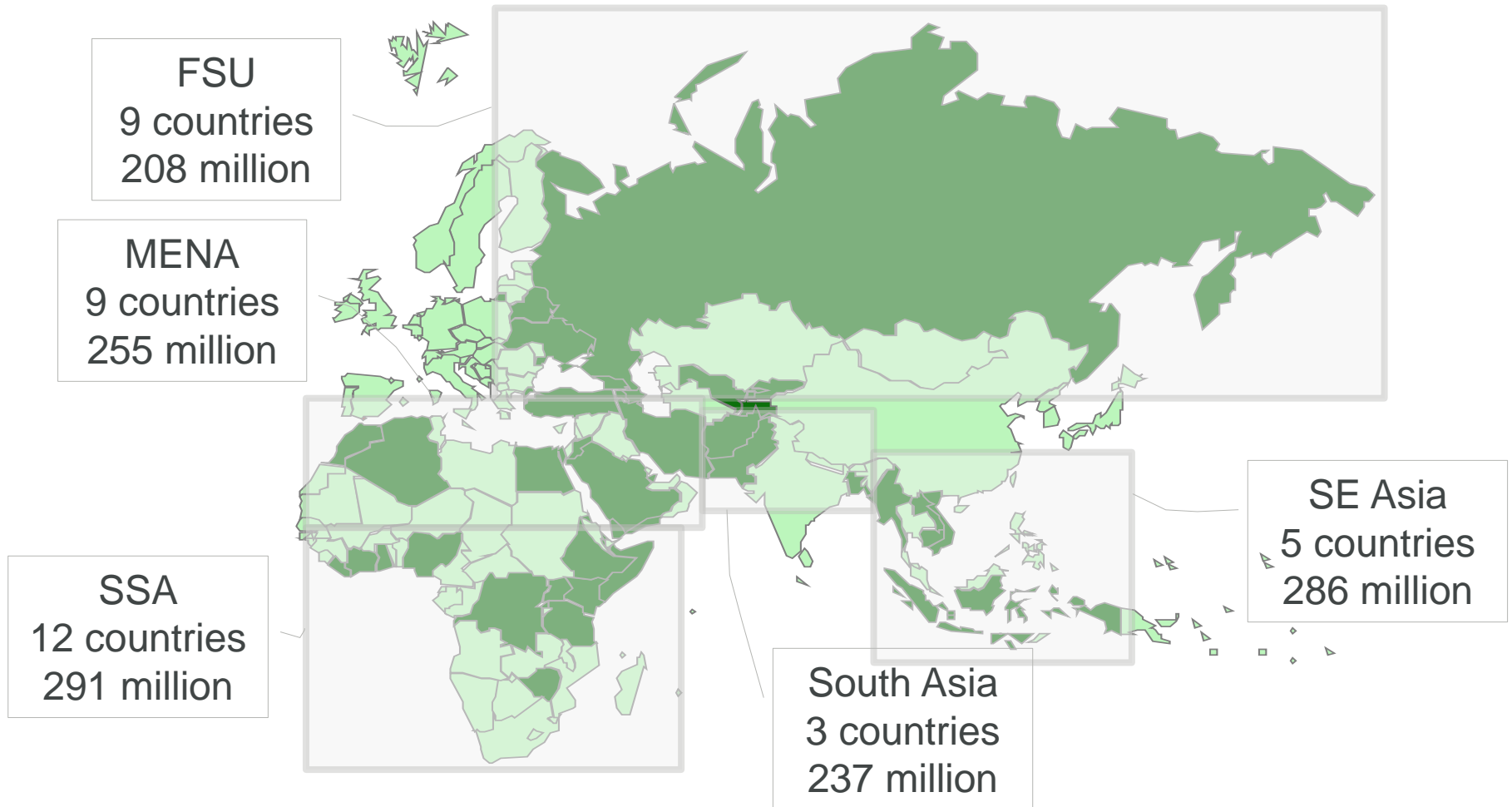
COUNTRY	REGION	YEAR
Burma	SE Asia	2013
Cambodia	SE Asia	2014
Indonesia	SE Asia	2013
Laos	SE Asia	2012
Vietnam	SE Asia	2012
Afghanistan	S. Asia	2012
Bangladesh	S. Asia	2013
Pakistan	S. Asia	2014

COUNTRY	REGION	YEAR
Armenia	FSU	2012
Azerbaijan	FSU	2012
Belarus	FSU	2013
Georgia	FSU	2012
Kyrgyzstan	FSU	2012
Russia	FSU	2013
Tajikistan	FSU	2012
Ukraine	FSU	2014
Uzbekistan	FSU	2012

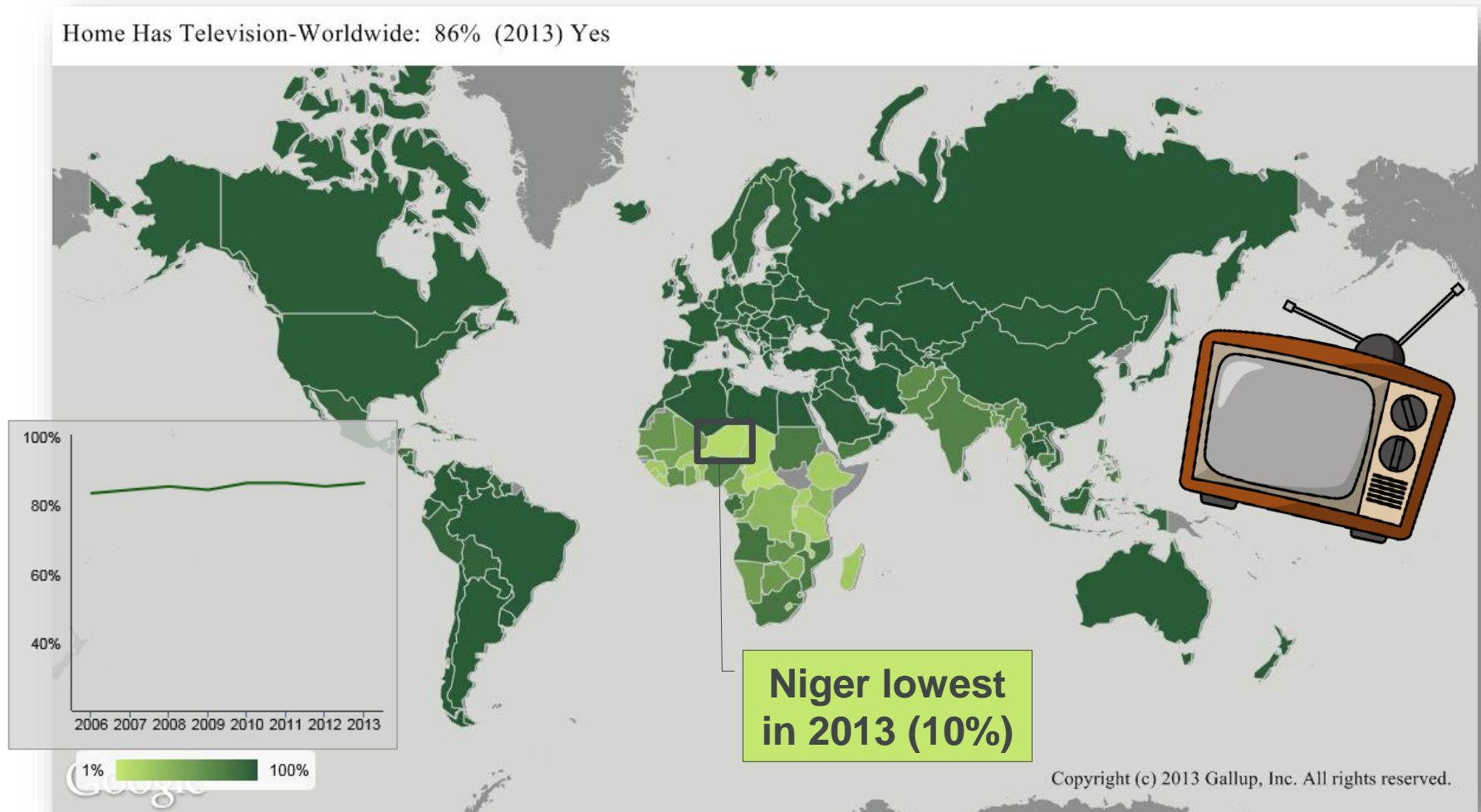
COUNTRY	REGION	YEAR
Algeria	MENA	2012
Egypt	MENA	2013
Saudi Arabia	MENA	2012
Jordan	MENA	2012
Morocco	MENA	2013
Iran	MENA	2013
Turkey	MENA	2013
Qatar	MENA	2014
Yemen	MENA	2012

COUNTRY	REGION	YEAR
Ethiopia	SSA	2012
DRC	SSA	2012
Ghana	SSA	2013
Ivory Coast	SSA	2013
Kenya	SSA	2013
Liberia	SSA	2012
Nigeria	SSA	2012
Rwanda	SSA	2012
Somalia	SSA	2012
Tanzania	SSA	2012
Uganda	SSA	2012
Zimbabwe	SSA	2013

IARP Countries: 1.3 billion represented

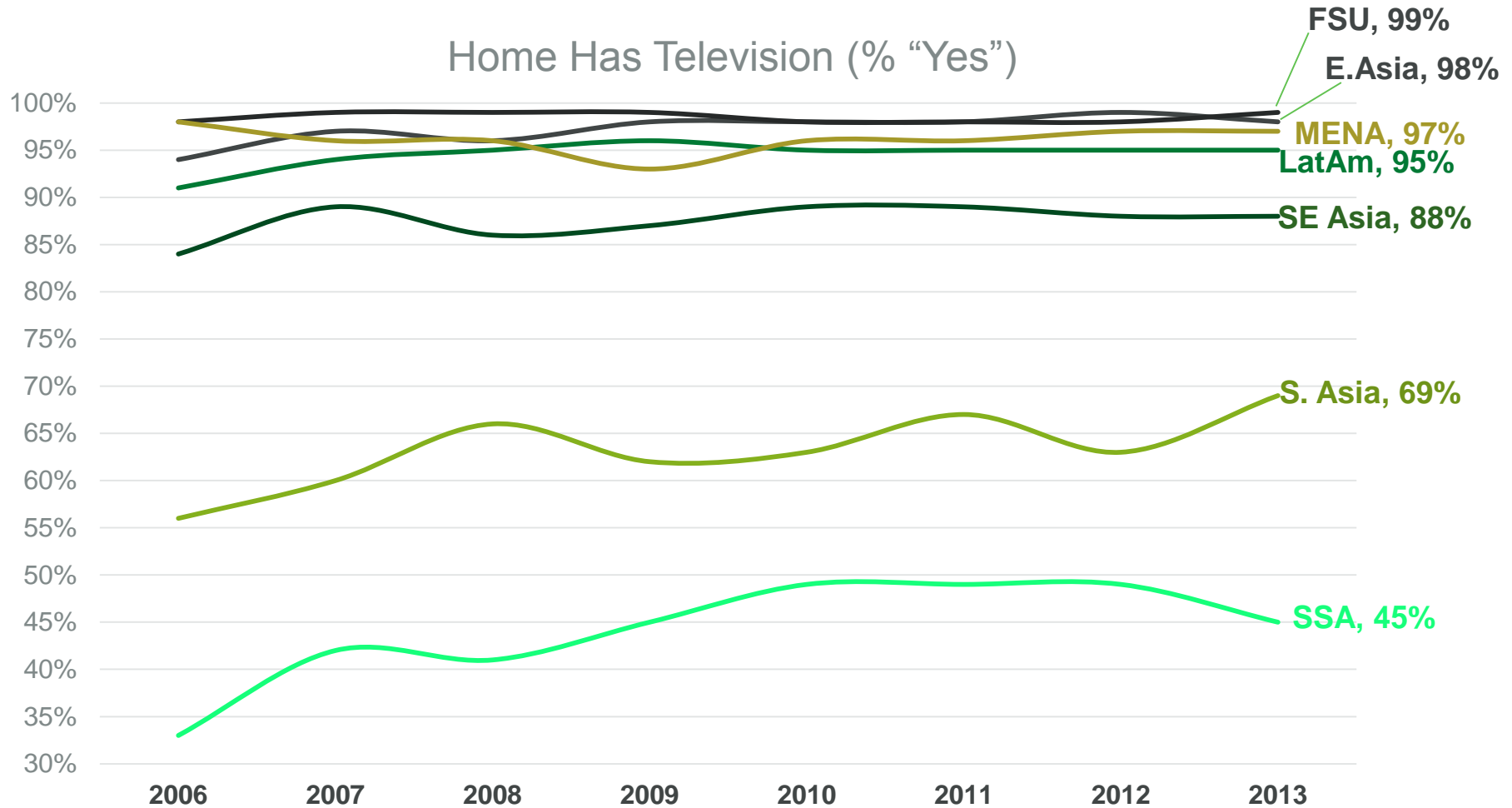


World Poll: 86% of adults have access to a TV at home – Trend flat, SSA & South Asia not quite there



World Poll: Regional Trends in TV Access Stable, with Feeble Growth in S.Asia and SSA

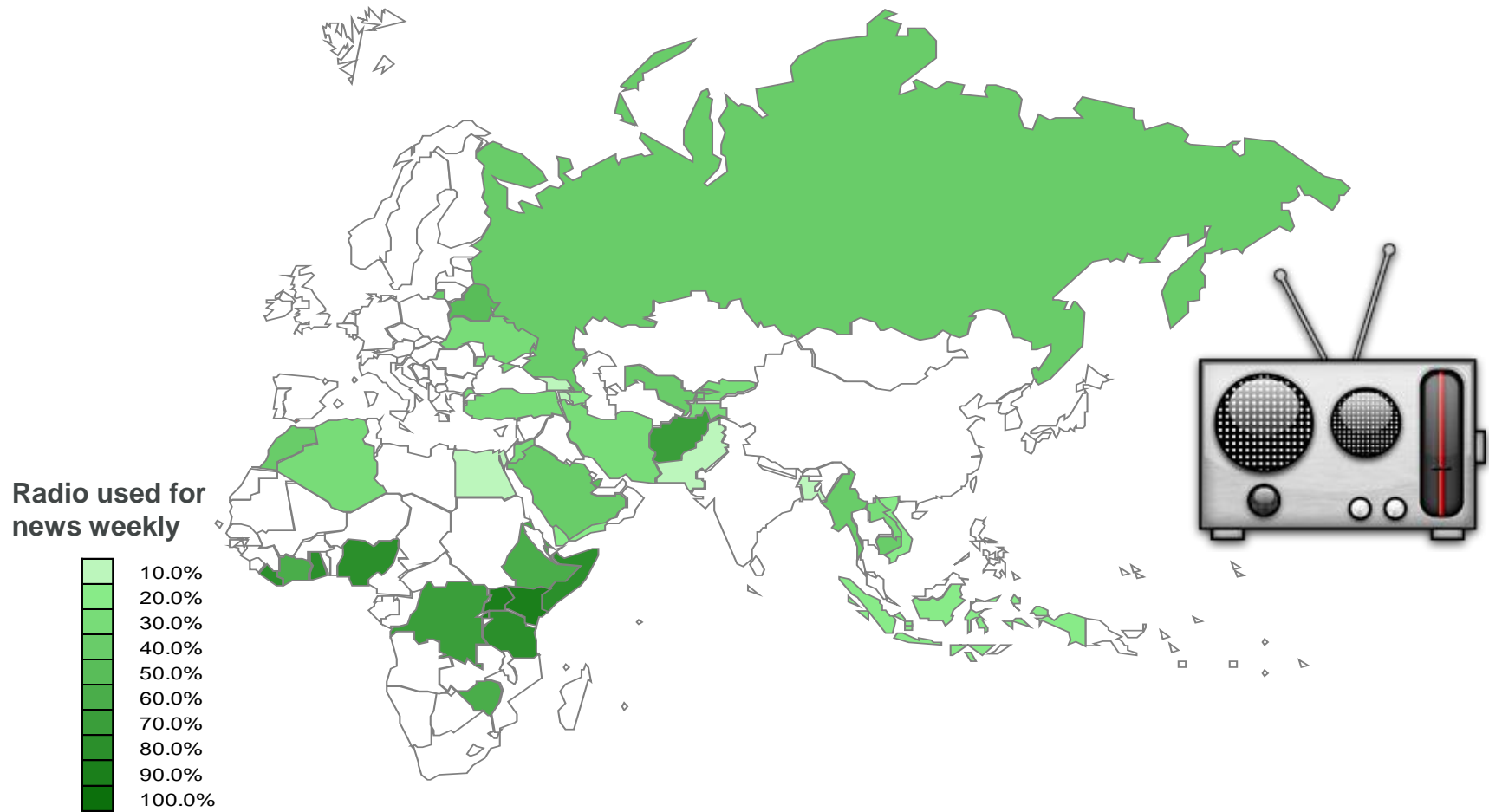
Home Has Television (% "Yes")



IARP: TV Used for News by 81% weekly - and by Majority in 30 of 38 Countries, Lowest in SSA (60%)

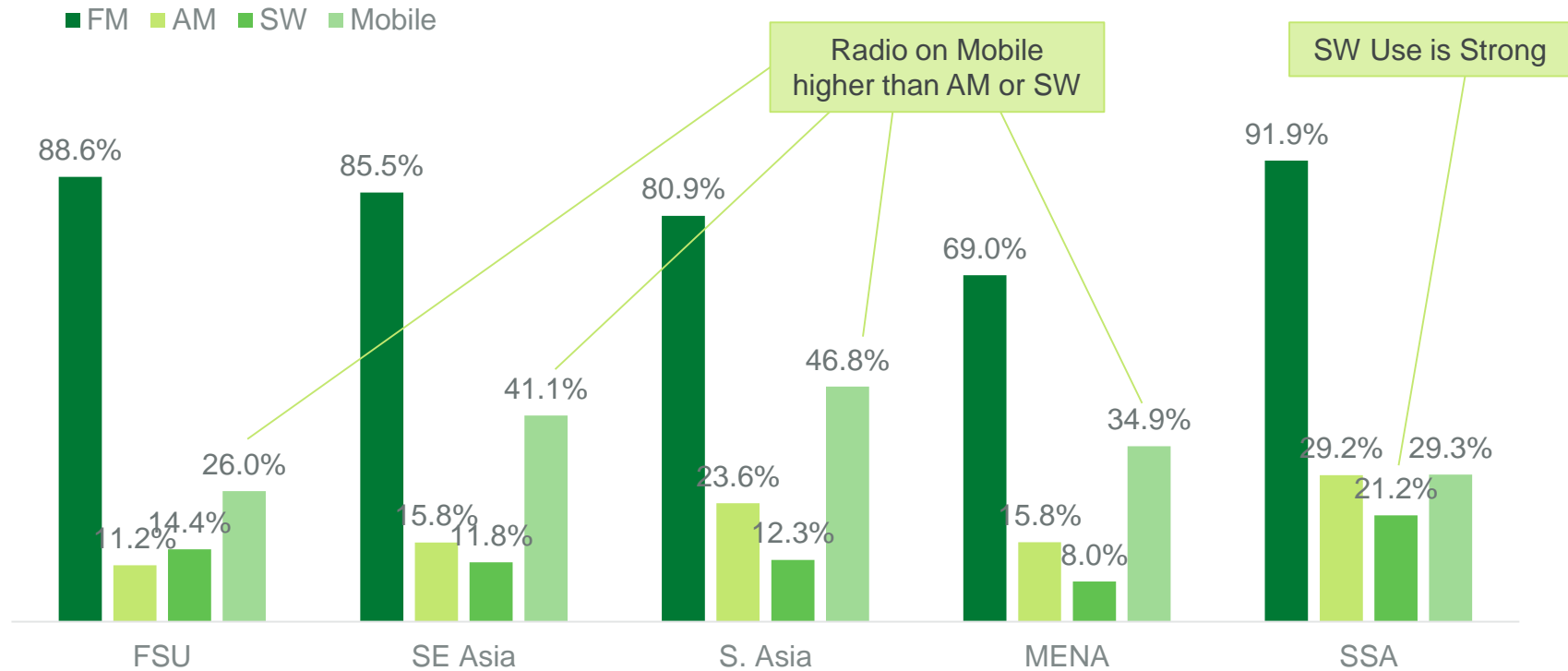


IARP: 39% Use Radio Weekly – Only 31% use Both Where TV is Not Heavily Used for News, Radio Is



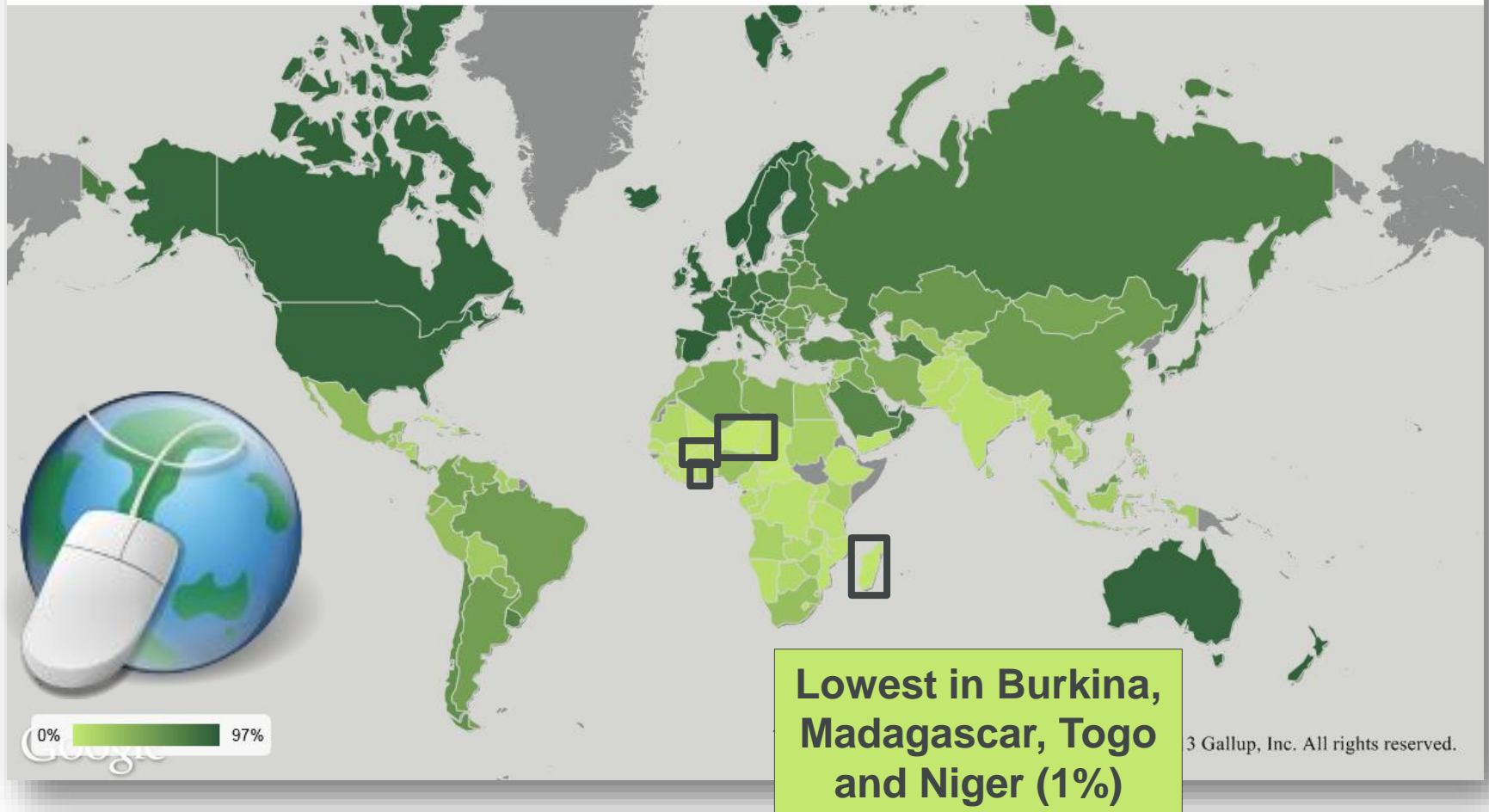
While FM is Most Used Waveband among PW users, SW and AM Used By Many in SSA and South Asia

Radio Waveband Usage by Region - Among Past Week Radio Listeners



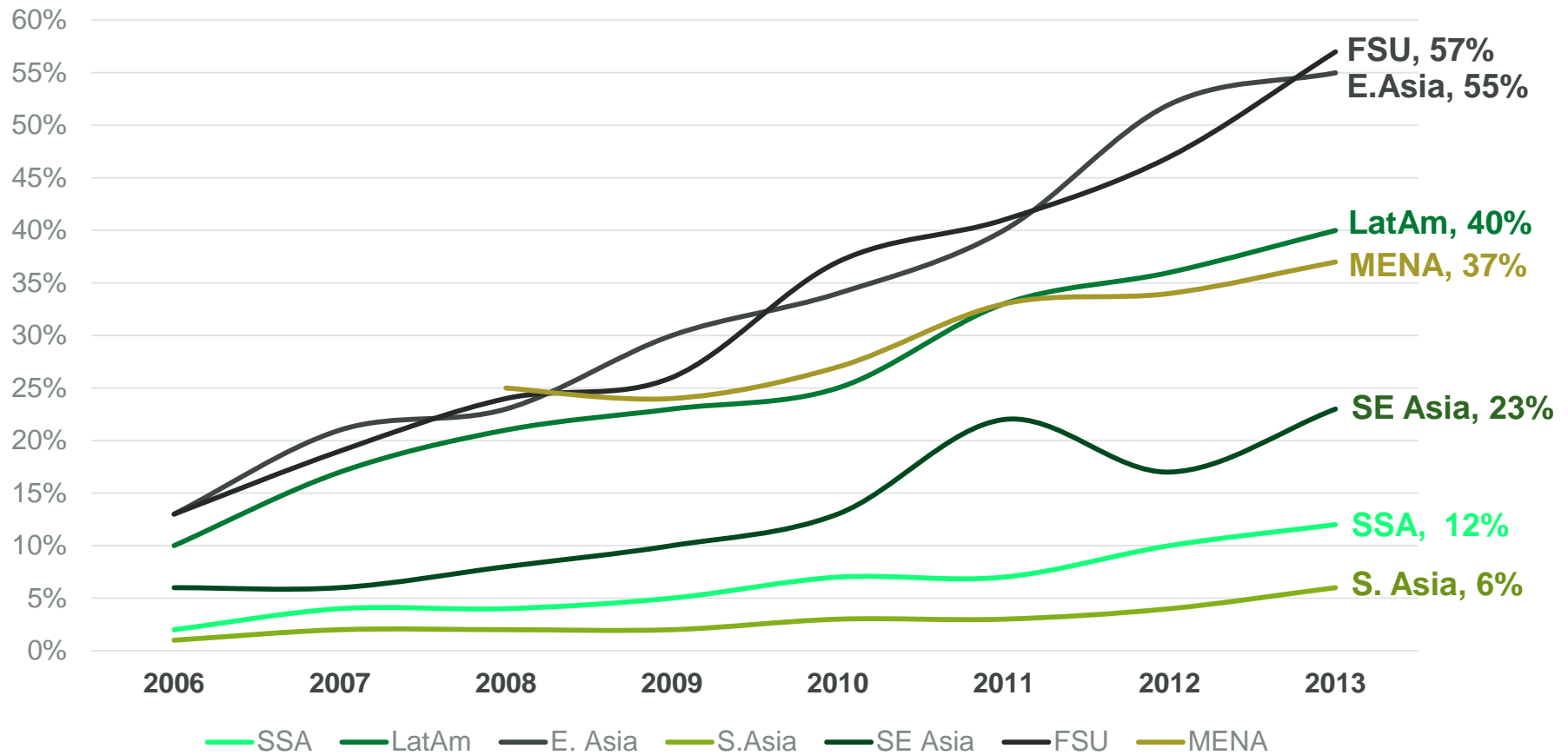
World Poll: Only 39% of adults have internet at home – Room for growth, except in advanced economies

Home Has Access to Internet-Worldwide: 39% (2013) Yes

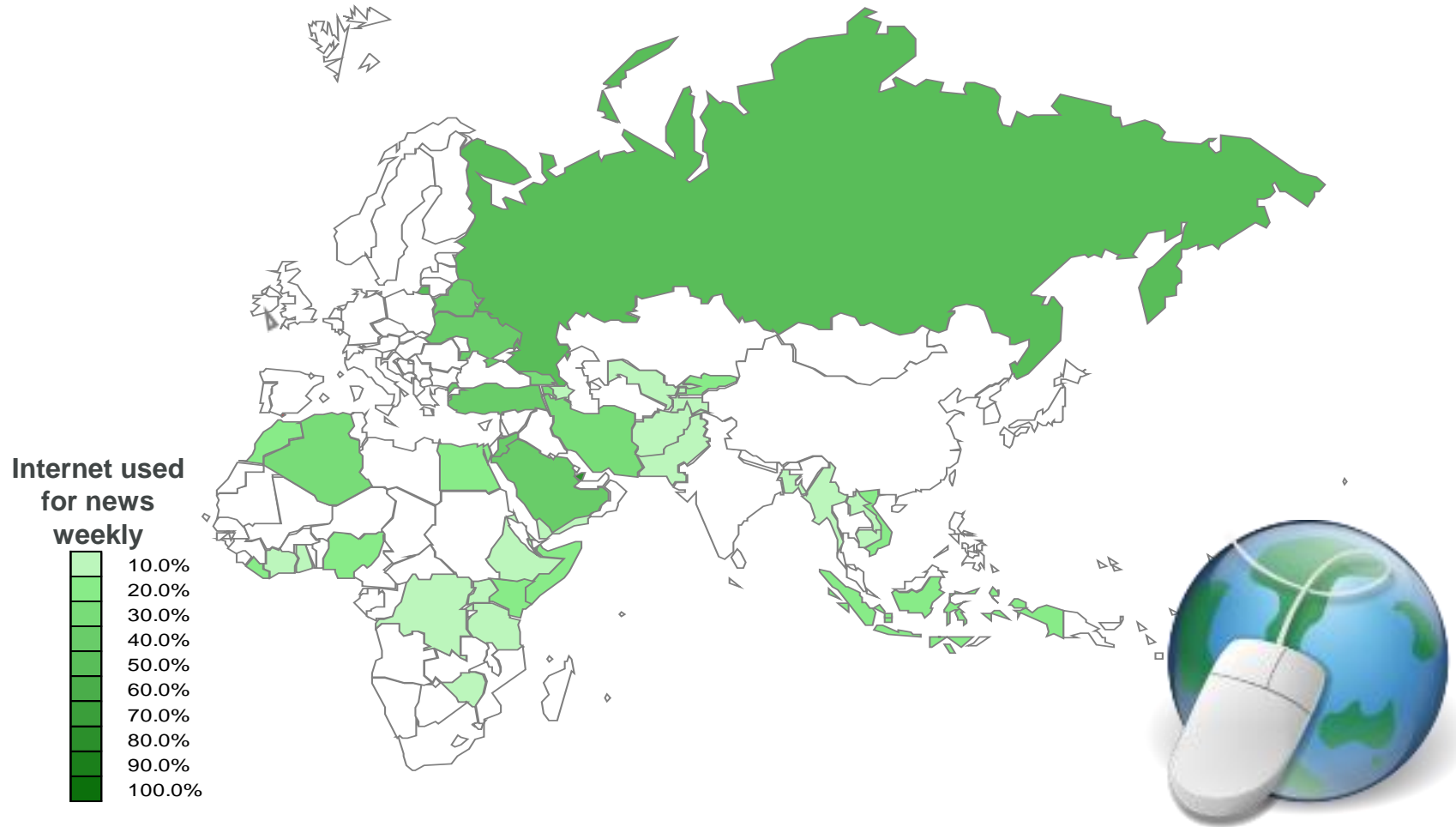


World Poll: Growth varies by region – Slow growth regions may leapfrog directly into mobile internet

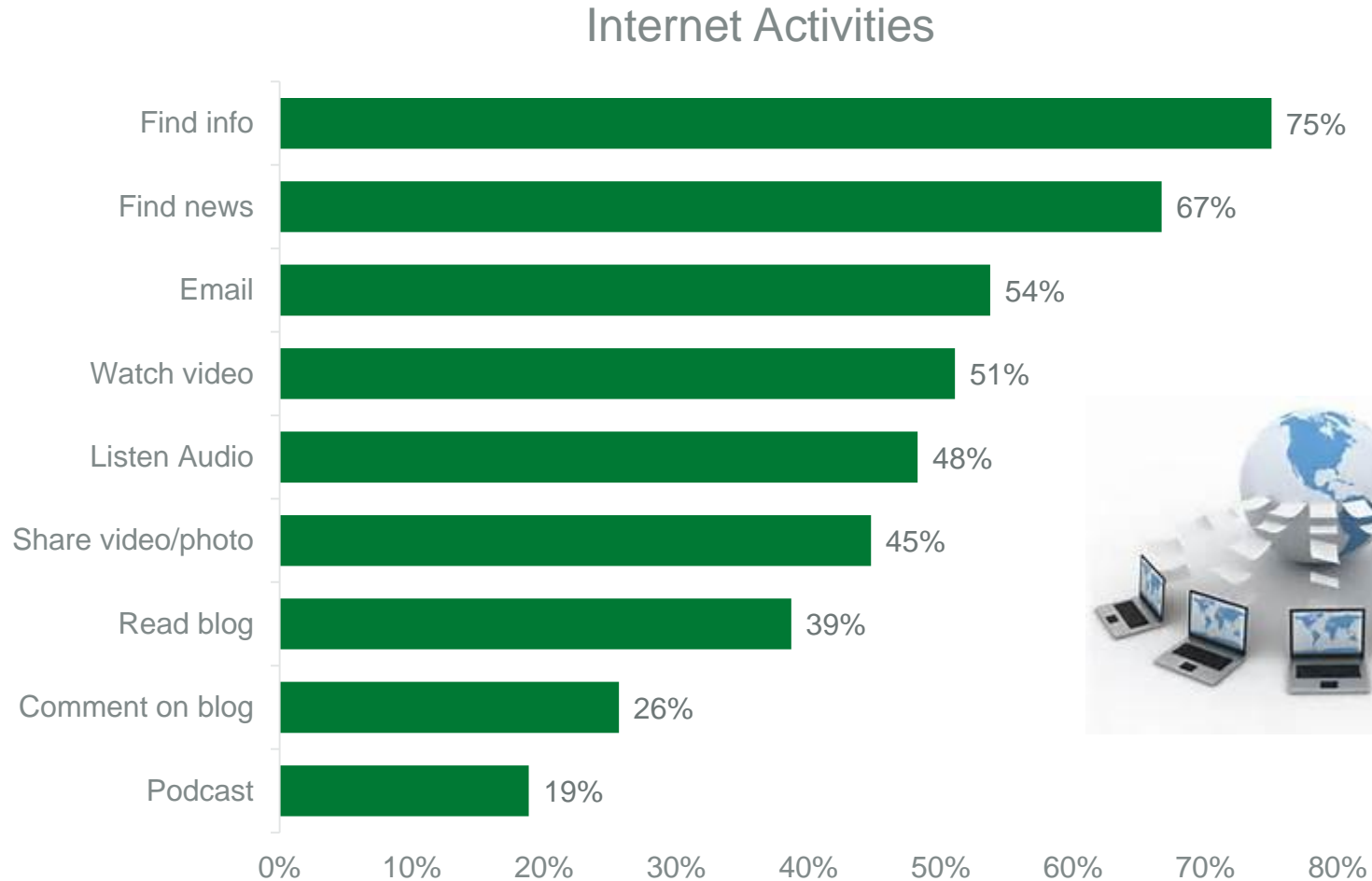
Home Has Access to Internet (% “Yes”)



IARP: 23% use the Internet for News Weeekly. Lowest in S.Asia (7%), SSA (14%), highest in FSU (47%)

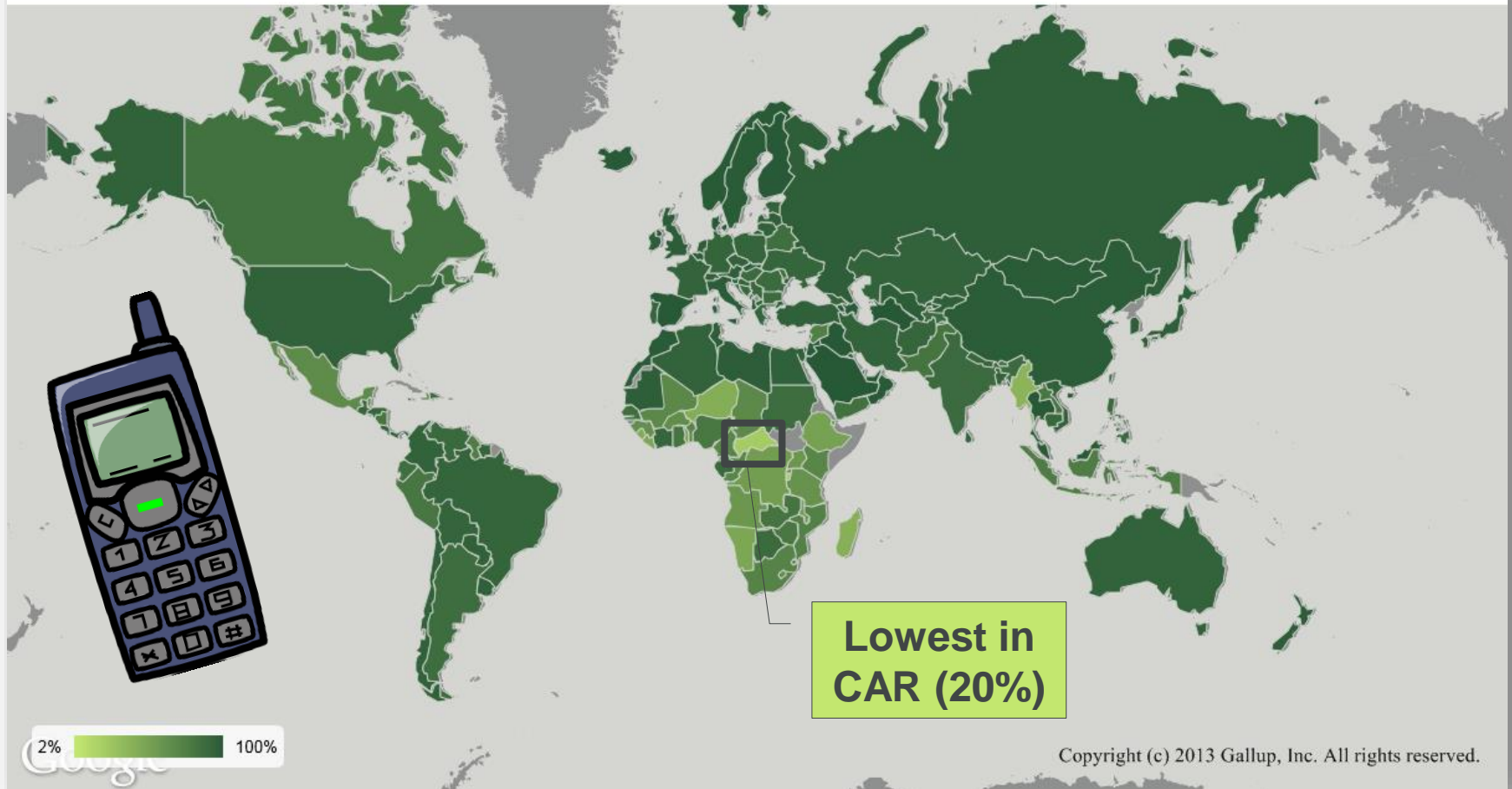


Among PW Internet Users: News, Information Search and Email are Most Frequent Activities



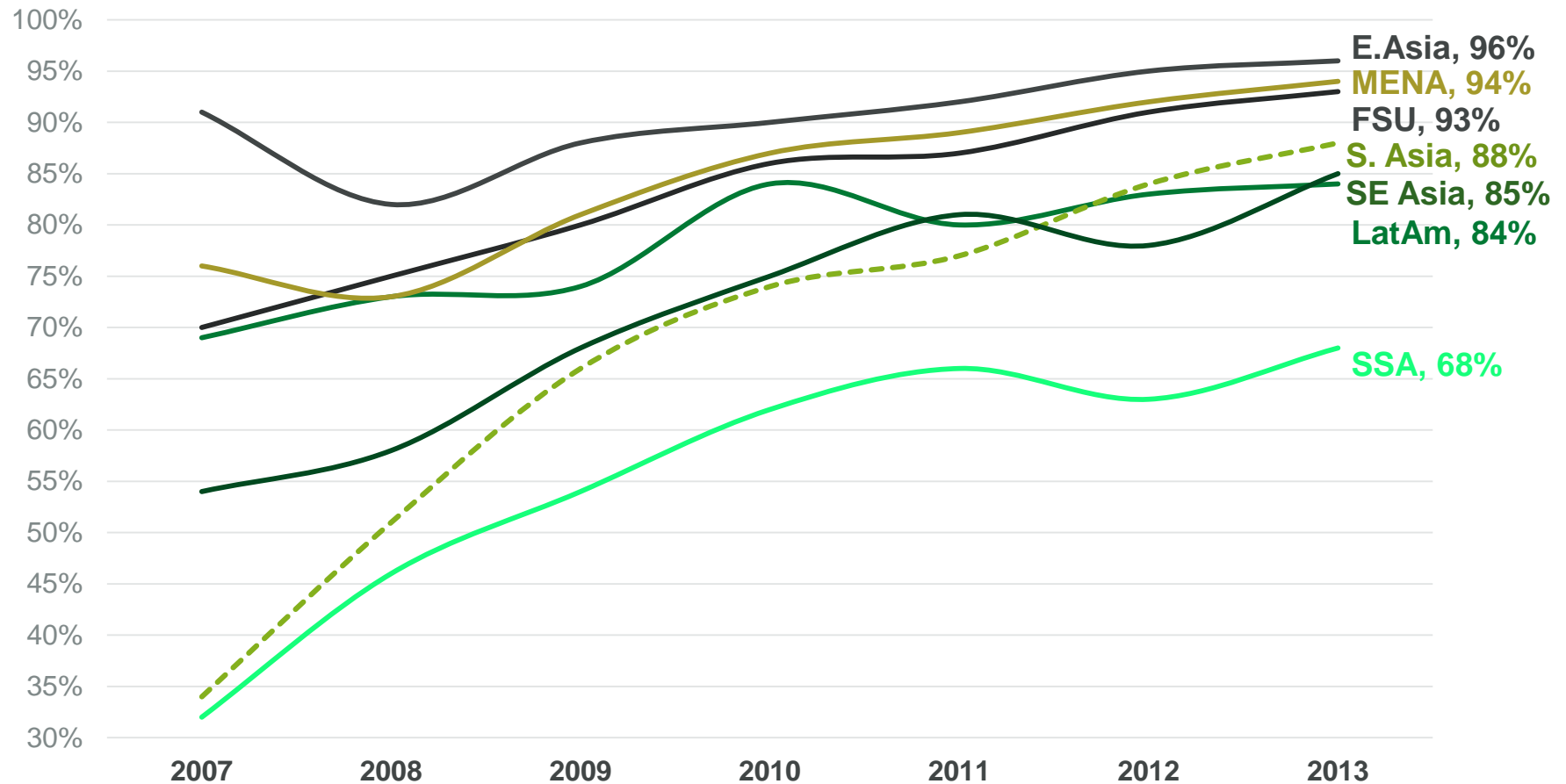
World Poll: Mobile Access Almost Universal – 89% of adults have access to a mobile phone at home

Home Has Cellular Phone-Worldwide: 89% (2013) Yes



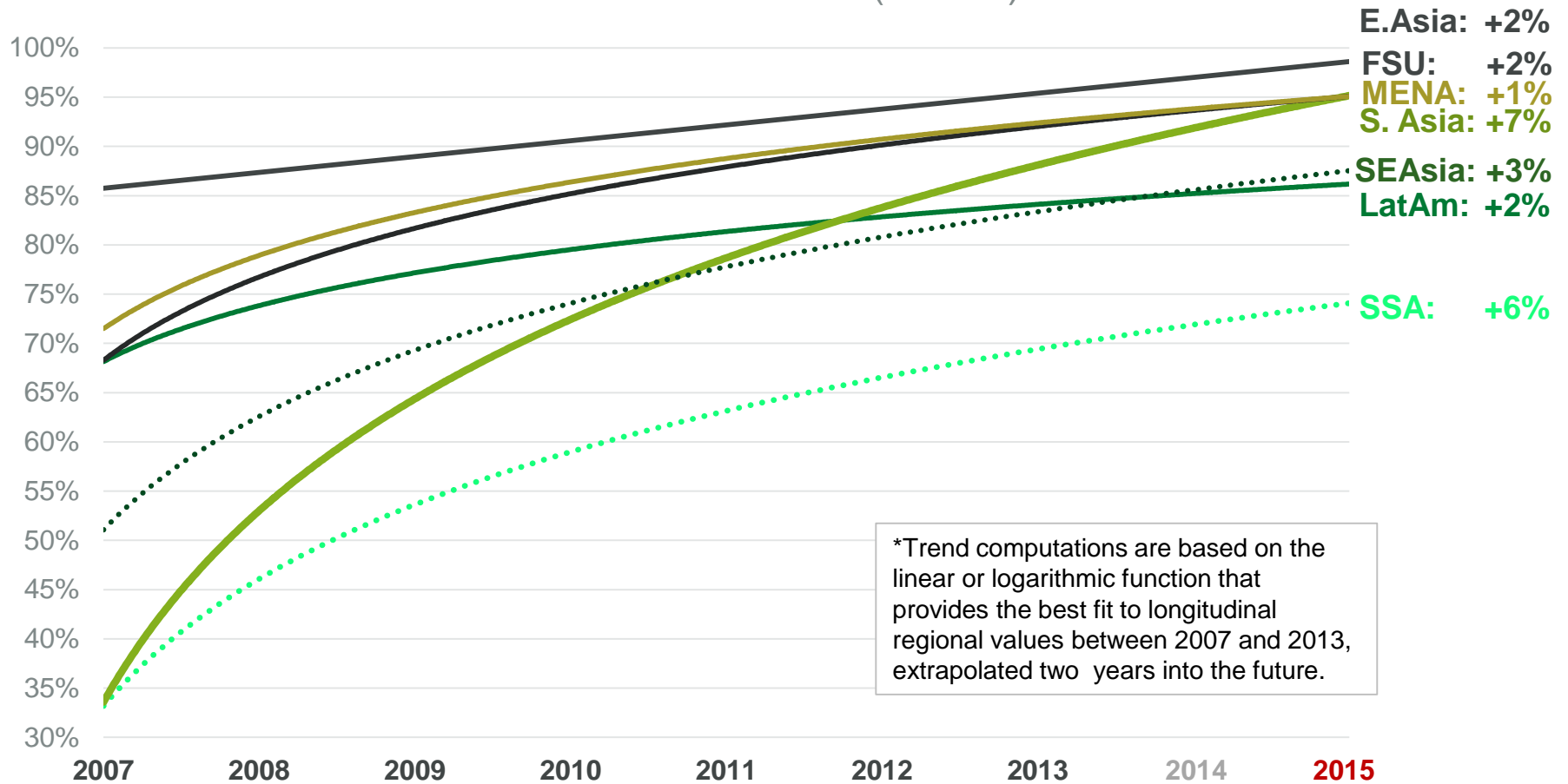
World Poll: Regional Mobile Growth Patterns Vary - Fastest in South Asia, Slowest in Saturated Markets

Home Has Cellular Phone (% "Yes")

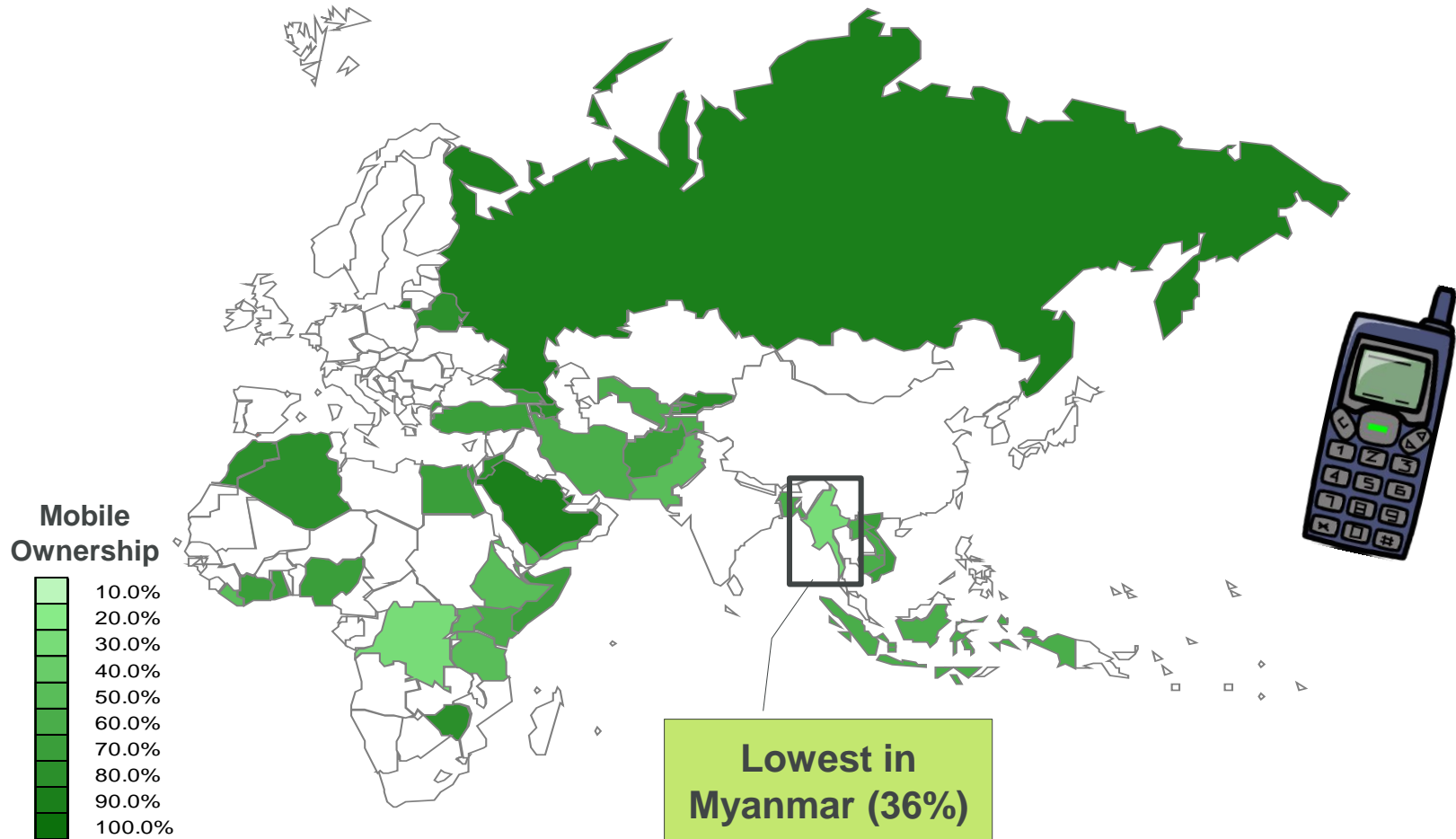


World Poll: Most future mobile growth may come from S. Asia and SSA

Home Has Cellular Phone (Trend*)

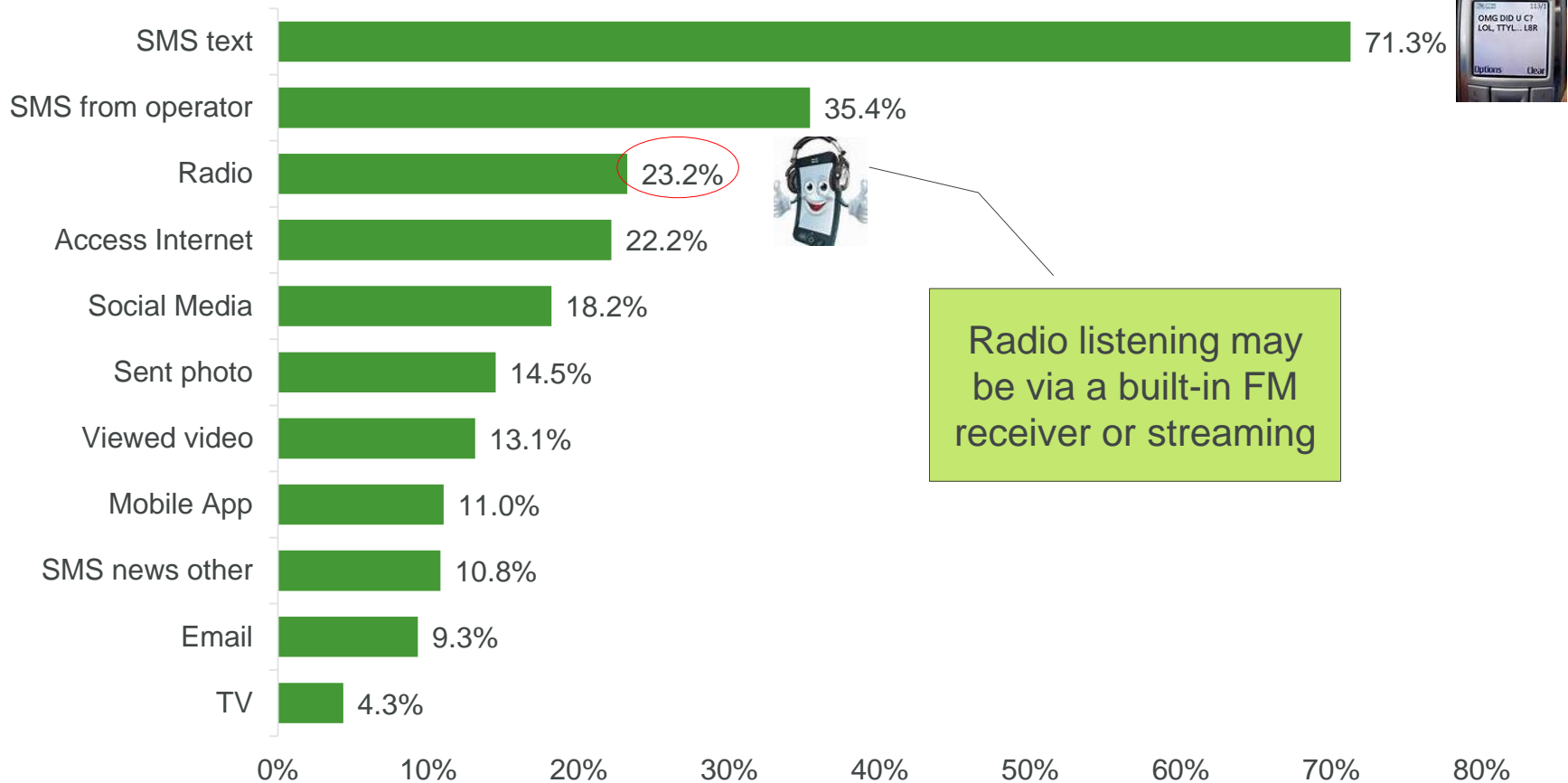


IARP: Personal Mobile Ownership Lowest in South Asia (59%), highest in FSU (86%) and MENA (78%)



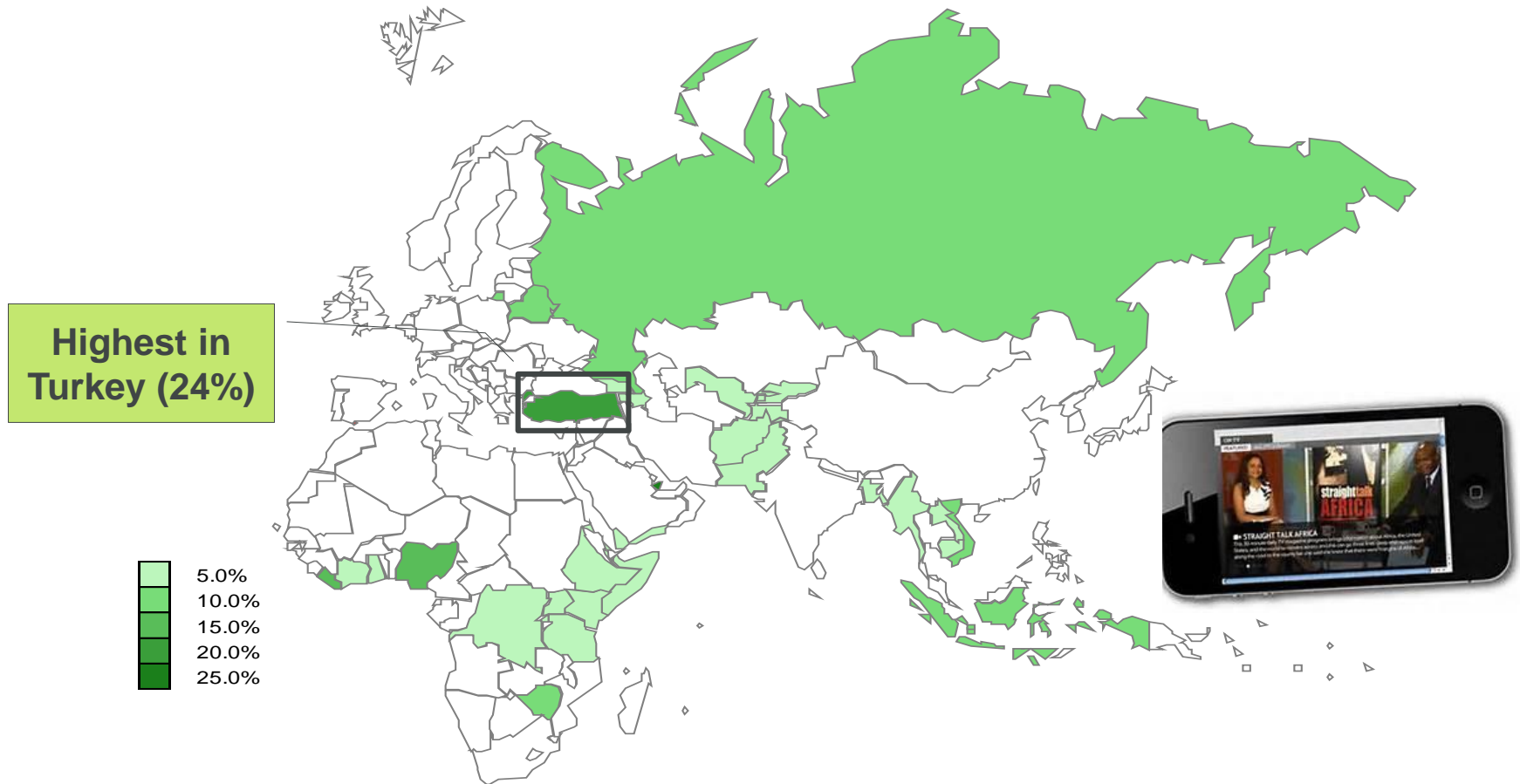
While Many Mobile Activities Can Be Done on Even Feature Phones, Use Beyond SMS is Low

Mobile Phone Activities Among Mobile Phone Owners



Mobile Apps for News is Low, But May Offer Growth Opportunities as Smartphones Become More Accessible

Use of Mobile Apps among Mobile Phone Owners



Mobile Use Clusters Can Provide Insights Into Non-Traditional (Radio/TV) Reach



*Only received news/ info
by SMS from operator/
news provider*



*Only used
phone to listen
to radio*

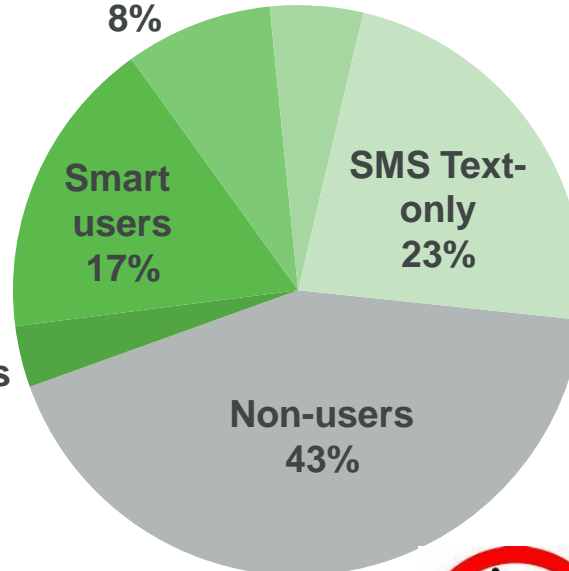
**SMS Receive
New Info only**
8%

Radio only
5%



*Used at least
one advanced
application
(internet, video,
photos, email,
app, etc.)*

Other users
4%



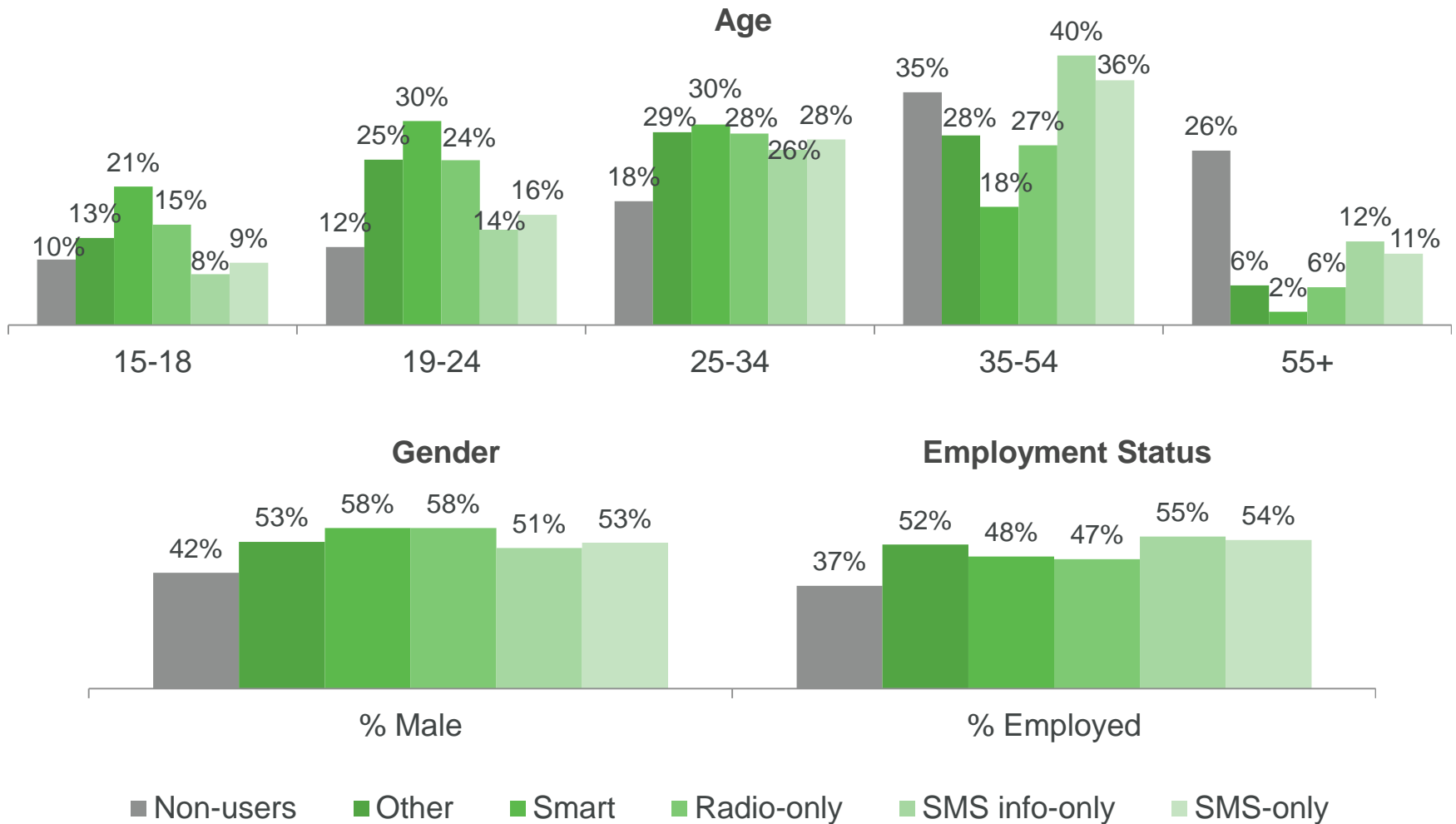
*Only sent/ received
SMS messages*

*Did not use
mobile in last
7 days.*



**NOTE: likely missing
phone call only group**

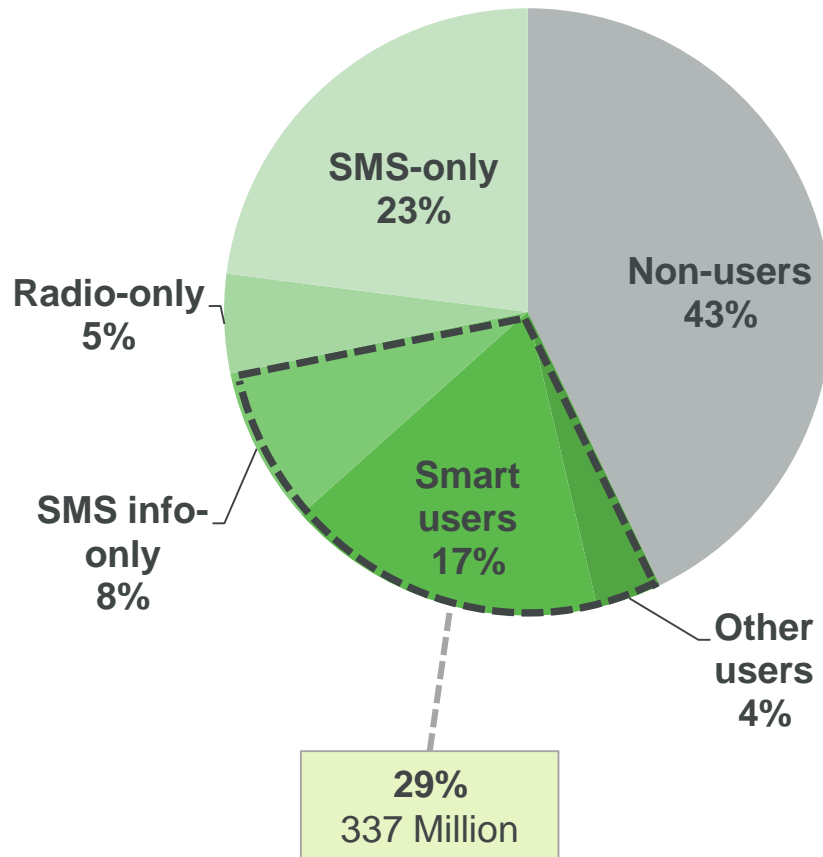
Demographic Characteristics of Mobile Use Clusters



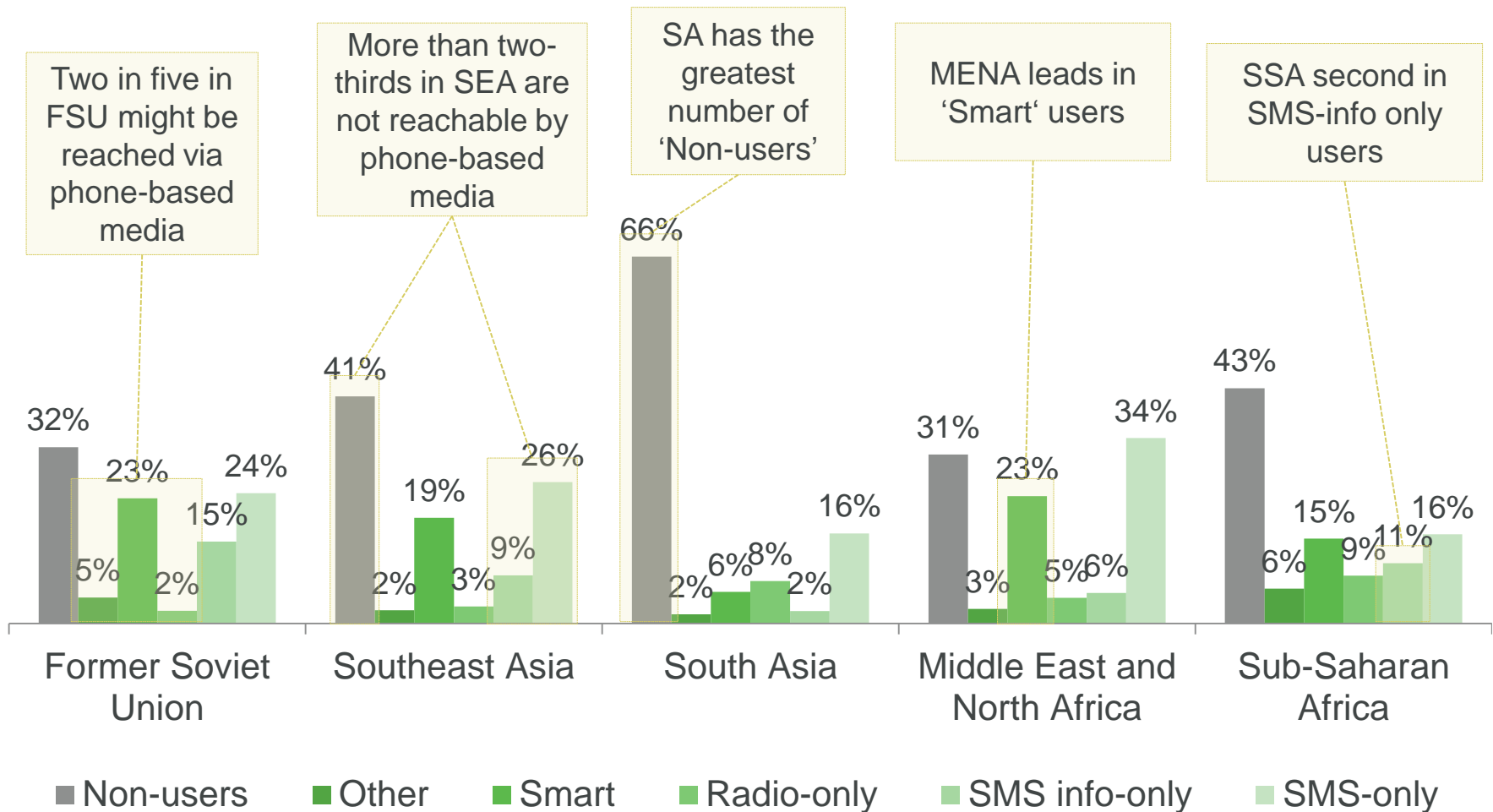
Three in Ten May be Reached by Phone-Based Media Strategies

- Reach **Smart Users** via *advanced mobile media* (though pattern of use is varied and complex)
- Use *SMS-based news services* to reach **SMS new/info users**

Mobile Use Clusters



Distribution of Mobile Use Clusters by Region



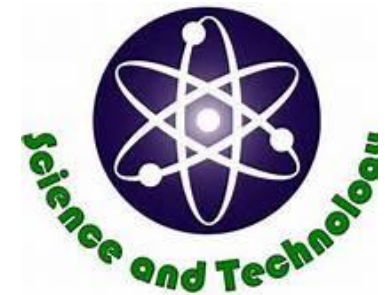


Healthy
Living

Arts & Culture

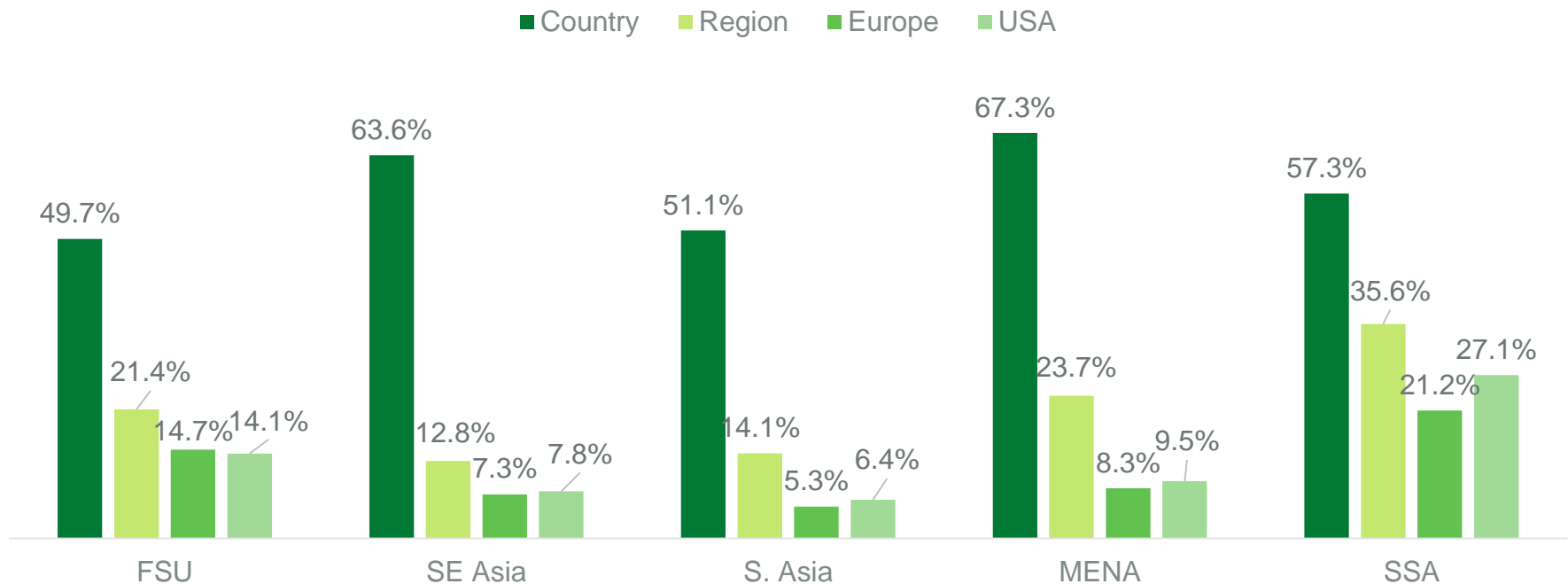


What Topics Do Media Users Find Most Interesting?

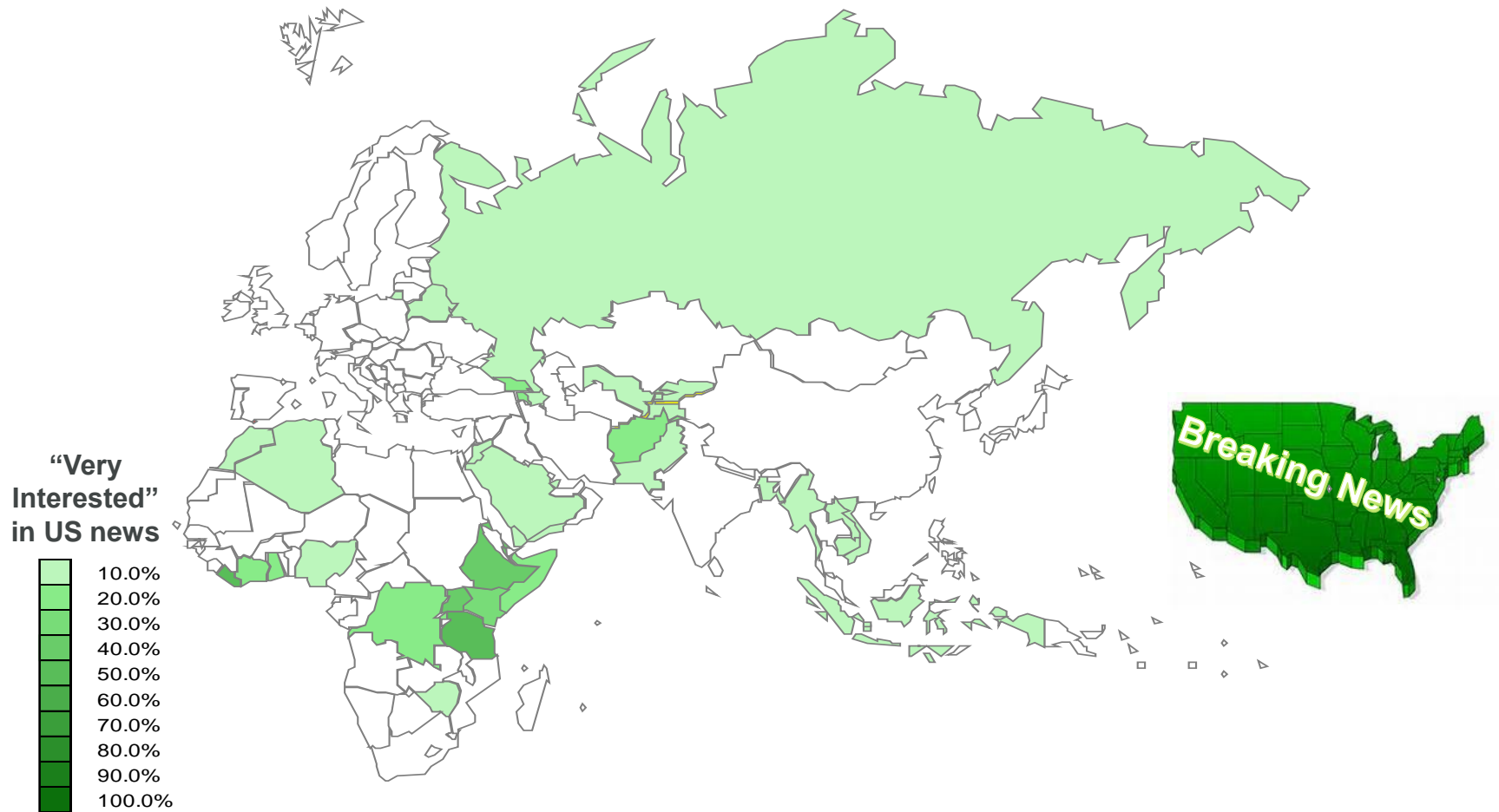


Greater interest in News on U.S. & Europe in FSU, SSA. Regional News more important in SSA.

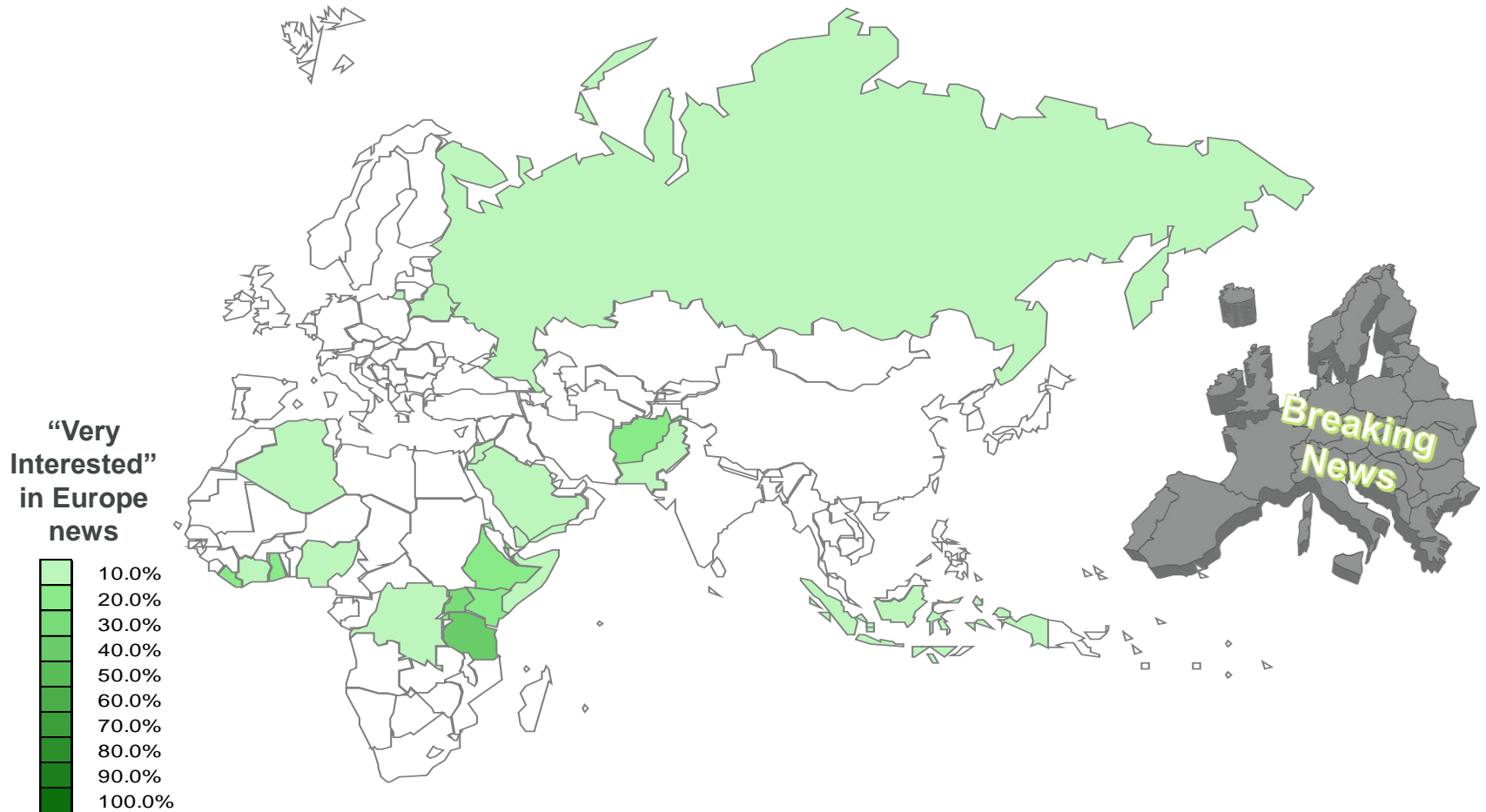
Interest in News by Region
(% “Very Interested”)



Greatest interest on US news in Liberia (53%), Tanzania (50%), Ethiopia (43%)



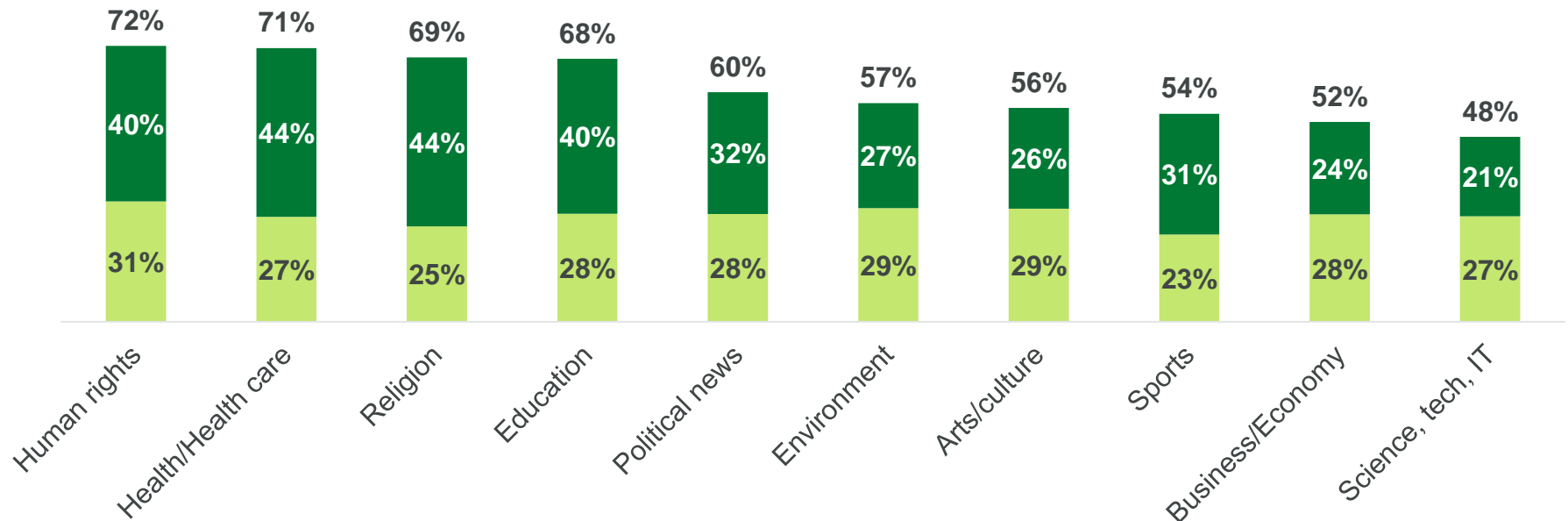
Greatest interest on Europe news in Tanzania (49%), and Uganda (38%) – Lower interest in SSA than US



Human Rights (72%), Health/healthcare (71%), Religion (69%), and Education (68%) top interests

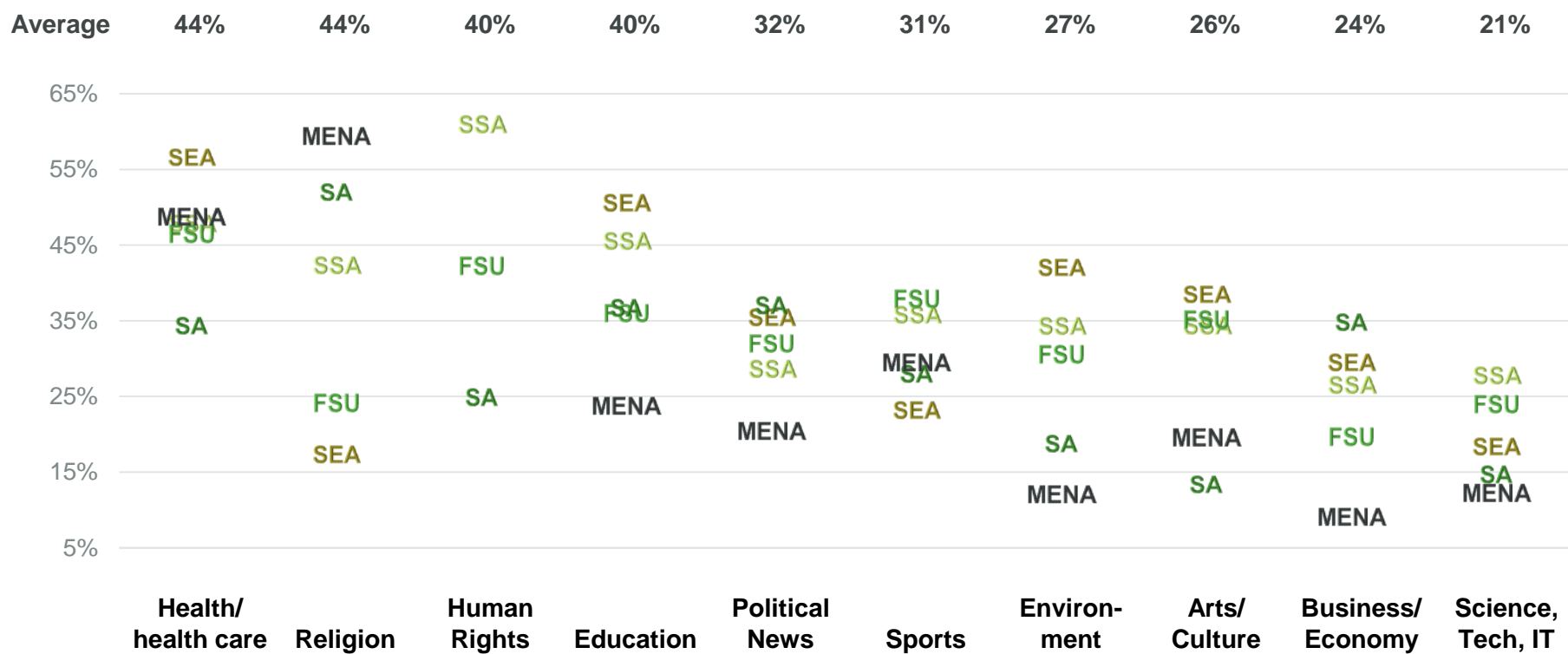
% Very or Somewhat Interested in Topics

■ Somewhat interested ■ Very interested

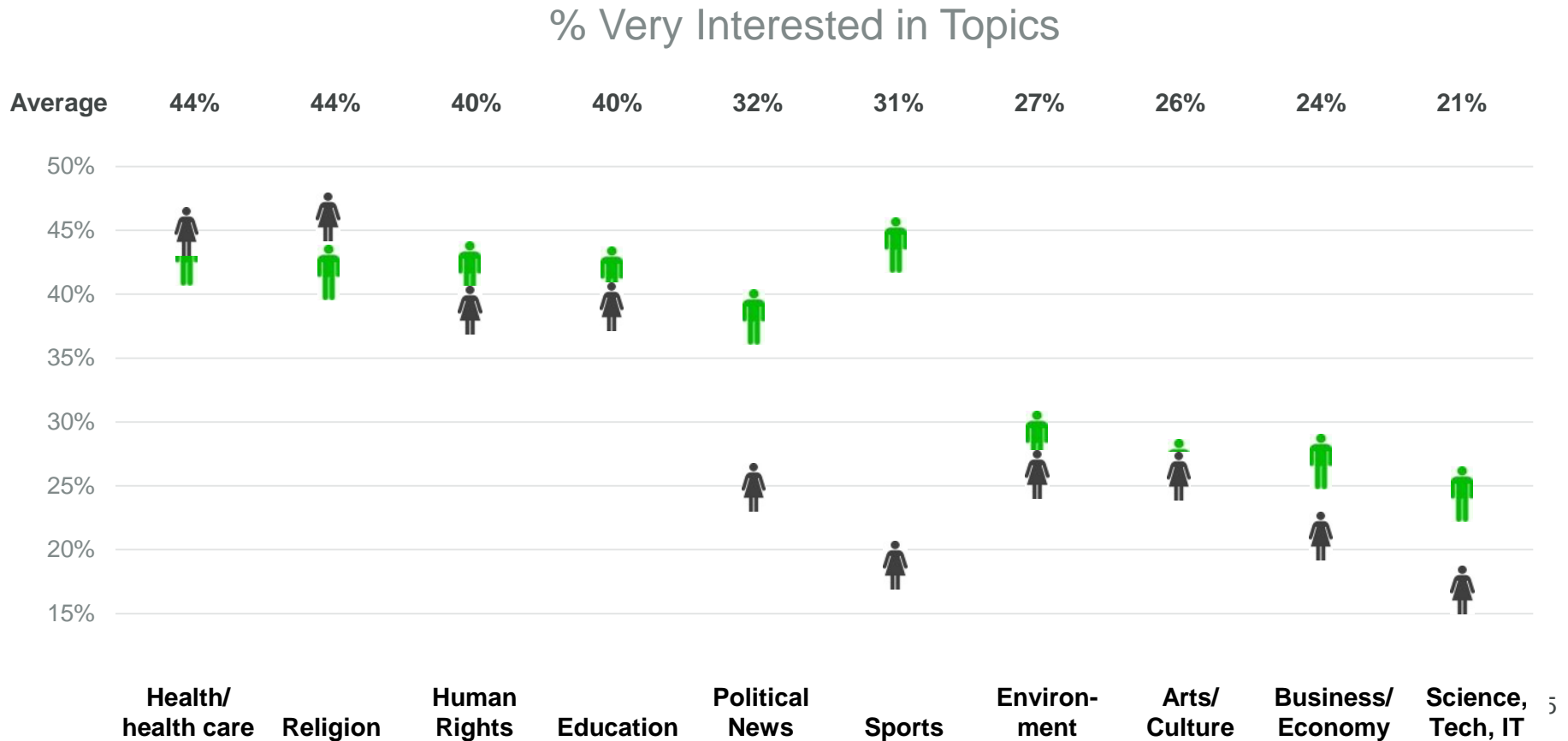


Human Rights is Key in SSA – Low interest on most topics in MENA, except for Religion

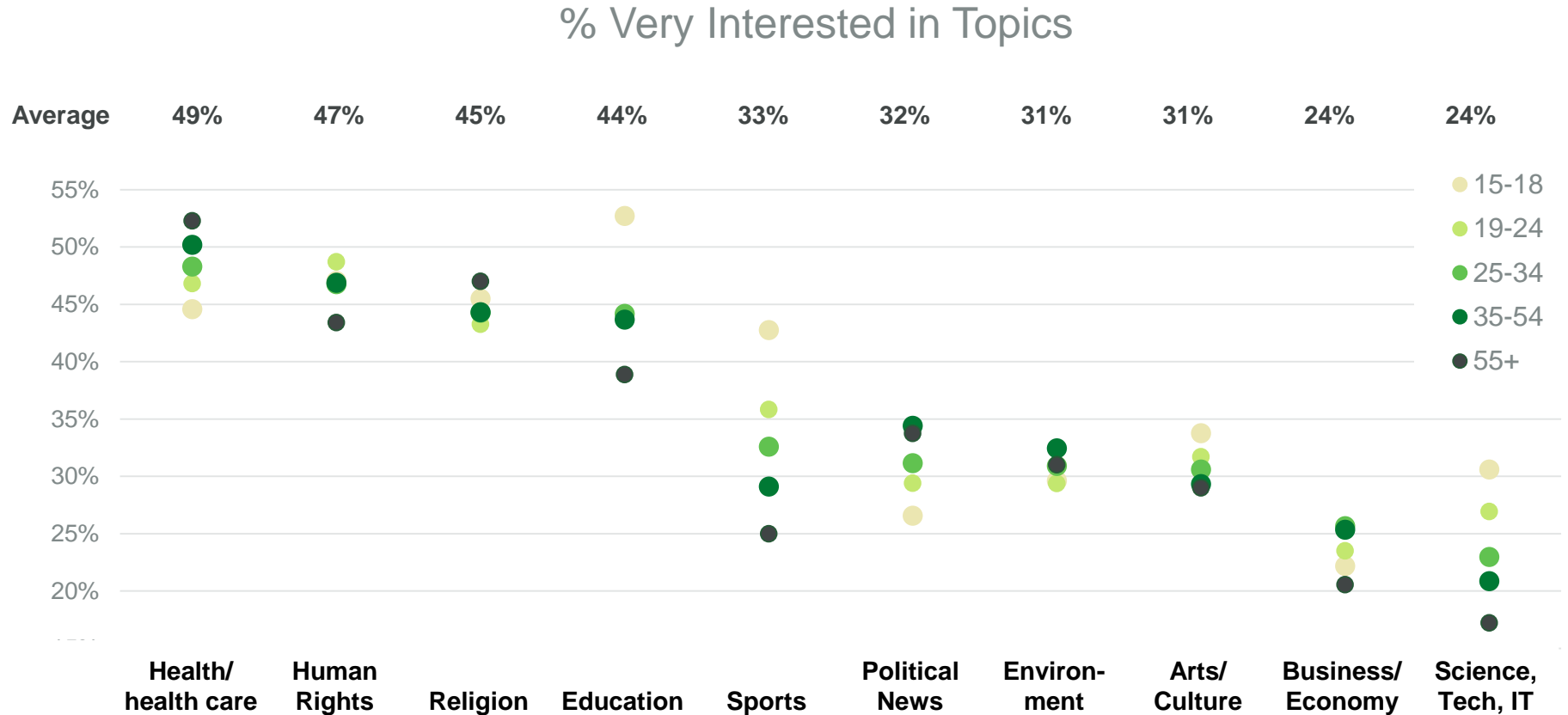
% Very Interested in Topics



Men More Interested in Sports, Politics, Science, and Business – Women Edge Slightly in Religion



Sports, Education & Science Appeal More to Youth, Older Residents More Interested in Politics, Health



To summarize...

TV

- Predominant source of news – except in SSA and SA.

Radio

- Supplement to TV in SSA & SA, with prevalence of FM.

Internet

- Different rates of penetration and growth by region.
- Less important source, but intensive use for news.

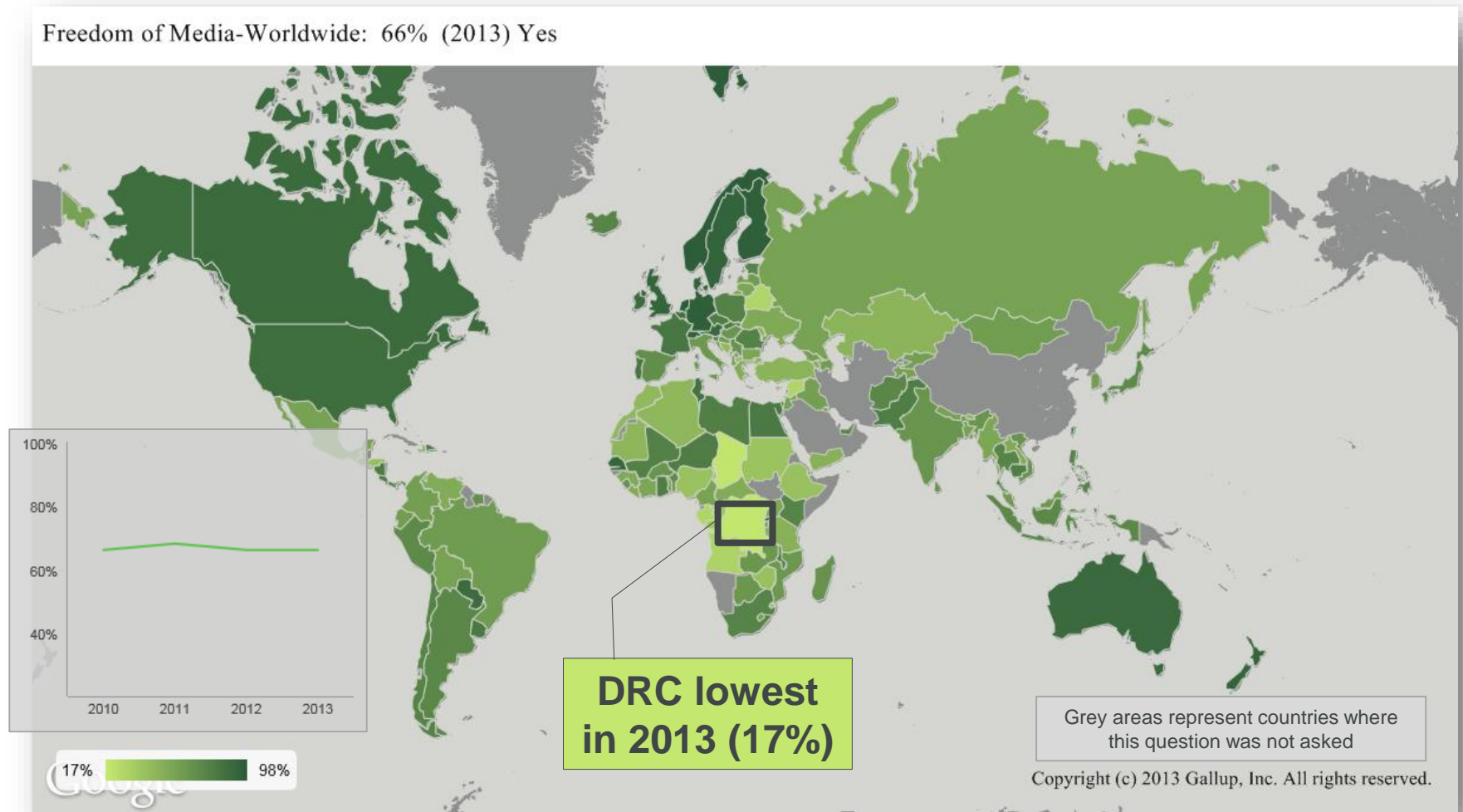
Mobile

- Near universal access, but complex pattern of use.
- With Internet, most potential for growth in media access.

Topics

- Important regional, age and gender differences.

World Poll: Media Access Increasing Worldwide – but Perceived Media Freedom Stagnant



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