MEDIA ACTIVITY GUIDE 2017
Media usage at a glance
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Dear readers,

A jury of linguists selected the term “fake news” as the “Anglicism of the year” for 2016. According to the jurors, this annual award reflects the continued public usage of the selected term. In recent years, we have indeed not only become accustomed to discussions about “fake news,” but also to similar terms such as “filter bubbles,” “echo chambers,” “hate speech,” and, last but not least, “alternative facts.” They represent the dark side of individualized mass communication and are at the very least unsettling for the large majority of people. According to the current Media Activity Guide (MAG), 78 percent of Germans are concerned about how trustworthy their sources of information may be. Traditional media, above all television and radio, enjoy the highest level of trust, followed by print publications.

The usage times that have been documented in MAG for years demonstrate that, even in the digital age, traditional media has never lost importance in people’s lives. Yet even in the public debate, there has recently been a renewed awareness of the value of traditional media. Traditional media publishes seriously researched information, maintains a strict separation between news and opinion, and provides entertainment content that meets minimum quality standards. Traditional media is a counterbalance to the unfiltered expression of opinions on the Internet and, in many respects, is indispensable for a democratic, consensus-oriented community.

In this Media Activity Guide 2017, you will learn how people are using media in 2017 to shape their everyday lives. We hope that the MAG will provide you with both entertaining and interesting insights.

Wishing you an enjoyable read,

Gerald Neumüller
Director Research
OVERVIEW OF MEDIA USAGE

The fragmentation and digitalization of the media landscape is opening up a growing number of possibilities for media use. Thanks to mobile devices such as smartphones, tablets, and smartwatches, individuals can access content at any time and from anywhere. The Media Activity Guide illustrates the impact that this wealth of offerings is having on the media consumption of Germans. One result: Media usage is more consistent than often assumed. Digitalization does not mean that television, print, or radio are becoming less relevant, but rather that people are increasingly consuming traditional media content in digital form.
In recent years, no other consumer electronics have spread as rapidly as mobile devices. Since 2014, smartphones and tablets in particular have established themselves at an astonishingly rapid pace. 88 percent of German households now have at least one smartphone, and on average there are two per household. The availability of tablets in households has nearly doubled since 2014. This development demonstrates the desire of users to be able to have easy access to media from anywhere and at any time. Other mobile devices such as laptops and e-readers have also gained in popularity since 2014.

The growing popularity of mobile devices, however, does not necessarily diminish the importance of stationary devices. With a consistently high prevalence of 94 percent, nearly every German household is still equipped with at least one television. On average there are 1.7 television sets per household.

On the other hand, wearables such as smartwatches and fitness trackers have not yet caught on. They can only be found in 15 percent of households even though they have been on the market for a number of years now. Virtual reality headsets, which are currently a popular topic of discussion, have made it into relatively few households to date. Even in the future these devices will not necessarily be a sure-fire success: Just 4 percent of Germans between the ages of 14 and 69 plan to purchase wearables in the next twelve months. At 3 percent, the intention to buy VR headsets is even lower.

Not every available technology is used. To evaluate the relevance of media devices in the population, we analyze personal usage in addition to device availability. Here, too, it is evident that mobile devices are rapidly gaining in significance: In recent years, the number of users of smartphones, tablets, laptops, and e-readers has significantly increased. Although 85 percent of Germans between the ages of 14 and 69 now use a smartphone, it still ranks second and is used less frequently than the TV set. The television set continues to be the most-used media device in 2017.
Due to the increasing usage of linear television on smartphones, tablets and computers, the slight decline in the use of stationary TV sets seems plausible.

Streaming devices such as Apple TV or Google Chromecast are designed to make TV sets without Internet functionality “smart”. The number of users of these types of devices has doubled since 2014: 18 percent of Germans between the ages of 14 and 69 use a streaming device. The current low prevalence of wearables and VR headsets has also resulted in low usage: 9 percent of Germans use wearables and only 3 percent use VR headsets. A clear sign that some technologies take time until they find their place in the everyday lives of users.

TELEVISION REMAINS A MEDIUM WITH A STRONG REACH
Apart from the dynamic development of mobile devices, the use of media in Germany has remained largely consistent. This becomes evident by analysing the reach of different media. Traditional media continues to reach most of the individuals. With the reach of 95 percent each, television and radio hold the top spot. The Internet as a transmission channel has increased significantly since 2014 due to the growing prevalence of Internet-capable devices, more affordable data packages, and progressive broadband expansion. 93 percent of Germans are now online at least rarely. This figure only conveys the technical reach of the Internet, however, should not be interpreted as the reach of the Internet as a medium. Printed newspapers have lost readers since 2014, whereas cinema have seen an increase in visitors.

10 HOURS OF MEDIA USAGE DAILY
The Media Activity Guide surveys both the daily time spent with media as well as that of individual communication. Media usage includes listening to, watching, or reading mass media content. Individual communication, on the other hand, refers to individuals who communicate using devices. The analysis examines both types of usage separately.

Media usage accounts for most of the daily time budget (09:40): Germans spend much less time on individual communication (02:01). At 248 minutes, television accounts for 43 percent of daily media usage. When it comes to personal communication, telephony is the leader with 45 minutes. Yet there is a significant difference in communication behavior depending on the age. Younger users between the ages of 14 and 29 spend the most time communicating via messenger (71 minutes). Users between the ages of 30 and 49 spend around the same amount of time on telephony (53 minutes) and e-mail (52 minutes). For users between the ages of 50 and 69, telephony and e-mail are the preferred forms of communication and are at 41 minutes each.
TELEVISION DOMINATES DAILY MEDIA USAGE
The overall picture of daily media usage has remained nearly unchanged since 2014: At 248 minutes, television accounts for most of the time spent with media. Compared to 2014, TV usage has increased by 3 minutes. The largest driver for this change is the usage via alternative distribution channels that has increased from 6 minutes in 2014 to 10 minutes in 2017. By contrast, Germans are spending much less time listening to the radio compared to 2014. They are, however, spending a bit more time reading newspapers and magazines. The reason for this is the growing use of digital newspapers and magazines. Internet usage regarding content – this includes all activities that depict the use of the Internet as a distribution channel for media content – has been steadily increasing for years. However, due to changes in the questionnaire, it is not possible to directly compare 2017 to the previous years. The majority of Internet usage is devoted to watching online videos, reading articles and posts, and using social networks.

CONCLUSION
• Reach and usage are increasing, especially for smartphones and tablets.
• New technologies are sometimes having a difficult time finding their place in the daily lives of users.
• Despite the increasing prevalence of Internet, television continues to have the greatest reach.
• On average, Germans spend 580 minutes a day on media and 121 minutes on personal communication.
• TV accounts for 43 percent of daily media usage. Users spend the second longest amount of time on the radio, and usage of Internet content follows in third place.

Ø daily usage time
A 14-69, in minutes

<table>
<thead>
<tr>
<th>Activity</th>
<th>2014</th>
<th>2017</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>580</td>
<td>245</td>
<td>-235</td>
</tr>
<tr>
<td>TV</td>
<td>248</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radio</td>
<td>129</td>
<td>102</td>
<td>-27</td>
</tr>
<tr>
<td>Internet content*</td>
<td>61</td>
<td>89</td>
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<tr>
<td>Games*</td>
<td>39</td>
<td>32</td>
<td>-7</td>
</tr>
<tr>
<td>Books printed &amp; digital</td>
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<td>32</td>
<td>2</td>
</tr>
<tr>
<td>Printed and digital publications</td>
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<td>31</td>
<td>6</td>
</tr>
<tr>
<td>DVD/Blu-ray</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other**</td>
<td>53</td>
<td>41</td>
<td>-12</td>
</tr>
</tbody>
</table>

Internet content: online videos, online shopping, social networks, reading articles/posts, blogs/forums, online navigation, e-learning, online banking
Source: Media Activity Guide 2017, SevenOne Media/forsa.
Discussions regarding fake news are having an impact on the media usage of Germans. Although fake news stories look like journalistic articles, they spread disinformation. Among other things, this occurs deliberately and with criminal intent. 78 percent of 14- to 69-year-olds frequently wonder about the trustworthiness of an information source. Traditional media enjoys the most trust: 70 percent of Germans trust television as a source of information. 75 percent rely on news from the radio. At 65 percent, the trust in news from newspapers and magazines is somewhat lower. Germans rate printed news as significantly more trustworthy than online news portals. The majority of individuals consider news in social networks to be questionable. Just 3 percent of Germans view posts on Facebook, Twitter, and similar social media platforms as serious sources of information. By contrast, more than half consider news from social media to be untrustworthy.

These results are especially topical given that Facebook has been attempting for years to establish itself as a relevant news source among its users. The social network is increasingly battling issues relating to the quality and credibility of its content. Challenges include the huge volumes of data and the fundamental Facebook philosophy that anyone can publish content. This means that it is nearly impossible to monitor the basic quality criteria for journalism, such as source security and research. Therefore, Facebook differs significantly from traditional news sources, which review and select content and especially news in accordance with strict criteria.
The Internet has now permeated all areas of life. In many professions it is impossible to imagine life without it. More and more is happening online even in the private sphere. It therefore comes as no surprise that 93 percent of 14- to 69-year-olds are online. In the target group of individuals between the ages of 14 to 49, 99 percent use the Internet.

Online usage behavior itself is extremely heterogeneous. Depending on the usage motivation and situation, online users access different devices and offerings. Nonetheless, it is possible to identify typical usage patterns. By means of a cluster analysis, we have identified five online user types among 14- to 49-year-olds: Fans, Mobile Natives, Networkers, Gamers, and Conservatives.
Online user types
Online users, A 14-49

FANS
Social demographics:
- 58% men (A 14-49: 51%)
- 34% ages 30-39 (A 14-49: 28%)
- 53% 3,000 or more monthly net household income (A 14-49: 36%)

Internet usage:
- Ø10 Internet devices (A 14-49: Ø7)
- 77 min. online videos per day (A 14-49: 45 min.)
- 14 min. online shopping per day (A 14-49: 8 min.)

CONSERVATIVES
Social demographics:
- 50% ages 40-49 (A 14-49: 32%)
- 60% employed full time (A 14-49: 55%)
- 27% secondary school certificate (A 14-49: 22%)

Internet usage:
- 22% use social media at least weekly (A 14-49: 58%)
- 18 min. online video usage per day (A 14-49: 45 min.)
- 88% smartphone users (A 14-49: 95%)

MOBILE NATIVES
Social demographics:
- 67% ages 14-29 (A 14-49: 47%)
- 38% students (A 14-49: 19%)

Internet usage:
- 91% usage on the go (A 14-49: 80%)
- 99% smartphone users (A 14-49: 95%)
- 69 min. messenger usage per day (A 14-49: 43 min.)

NETWORKERS
Social demographics:
- 64% ages 20-39 (A 14-49: 53%)
- 38% unemployed, housewives (A 14-49: 8%)
- 38% to less than 2,000 monthly net household income (A 14-49: 28%)

Internet usage:
- 79% social media users per day (A 14-49: 45%)
- 4 min. sharing content per day (A 14-49: 2 min.)
- 30 min. online videos per day (A 14-49: 45 min.)

GAMERS
Social demographics:
- 58% men (A 14-49: 51%)
- 39% ages 40-49 (A 14-49: 32%)
- 49% secondary school certificate (A 14-49: 30%)

Internet usage:
- 73 min. digital games per day (A 14-49: 41 min.)
- 70% usage on the go (A 14-49: 80%)
- 99% stationary PC (A 14-49: 58%)

Source: Media Activity Guide 2017, SevenOne Media/forsa
FANS
Up to two thirds of Fans are over the age of 30. They tend to be male and their employment rate is above the average. They have the highest level of education and household income. Fans are true technology enthusiasts. Compared to the other user types, they have the most internet devices. 20 percent use virtual reality headsets, 32 percent a smart-watch or fitness tracker, and 40 percent streaming devices. This affinity for technology is also evident in an especially high level of connected TV usage. 91 percent of individuals in this group have connected their TV set to the Internet.

The high level of online and technology affinity is also reflected in a high level of mobile usage: 86 percent of Fans use the internet whilst on the go.

Videos play a major role for fans. Out of all the groups, they spend the most time on free (49 minutes) and paid (27 minutes) online videos. Their television usage via live-stream is also comparatively high at 15 minutes per day. This enthusiasm for videos extends beyond the Internet: At 199 minutes, Fans spend an above-average amount of time on traditional television.

Mobile natives spend an above-average amount of time on free and paid online videos. Evidently, because of their affinity for smartphones, at 16 minutes, they spend more time than any other group watching free online videos on the small screen.

They are also particularly interested in audio: Mobile natives spend nearly one hour a day listening to music on services such as Deezer or Spotify. This is logical, given their high level of usage on the go.

Not surprisingly, Mobile Native also demonstrate a preference for smartphones when it comes to communication. Out of all the groups, they spend the most time using messenger services. Social media is also popular among Mobile Natives. 81 percent visit social media networks at least on a weekly basis, and social media platforms are generally easy to use on smartphones. At 24 minutes, the daily usage time is comparatively high.

NETWORKERS
The majority of Networkers are between the ages of 20 and 39. The group is equally split between men and women. Although an above average number of Networkers are often employed, this group also includes housewives and individuals who are not employed. The income tends to be low.

Among Networkers, the usage frequency of social media networks is particularly high. 79 percent visit social networks on a daily basis, while the rest visits at least weekly. Networkers are especially fond of sharing information, photos, and videos. At 23 minutes, their social media usage is above average. This social streak, however, is also evident in other forms of communication. At 68 minutes a day, they spend significantly more time reading and writing e-mails than the population average.

When it comes to video usage, Networkers tend to have a more traditional behavior. Their online video usage is below average. This applies both to free (30 minutes) and to paid (1 minute) services. By contrast, traditional television is very popular with this group with a daily usage of 207 minutes.
**Gamers**

Gamers tend to be male. This group includes an above-average number of 40- to 49-year-olds as well as 14- to 19-year-olds. Gamers are frequently students, apprentices, or not employed. Their income as well as their level of education are in the lower to middle range. Gamers are passionate about digital games, both online and offline. They spend 30 minutes longer per day on gaming (73 minutes) than the average. Because high performance computers are needed for games, nearly everyone in this group uses a stationary PC. In addition, 48 percent also have a game console. Gamers enjoy spending time at home: In this group, online use on the go is only 70 percent. But Gamers do more than play games: At 23 minutes, their e-book usage is above average. They spend a bit more time than the average on free online videos (40 minutes). Their paid video usage is average at 14 minutes.

Gamers spend relatively little time online for social networking. They spend only 25 minutes a day on writing e-mails. When they do communicate online, they do so via messenger. The usage time is slightly below average at around 39 minutes. Gamers also have less interest than the average person in social networks: 46 percent use social media networks on a weekly basis. Only when it comes to looking for partners Gamers spend more time per day than other groups (3 minutes).

**Conservatives**

Conservatives are the oldest among the five online user types. This group has roughly the same number of men and women. An above average number of Conservatives are full-time employees. In addition, Conservatives include numerous part-time employees and housewives. Most of the individuals in this group have an intermediate level of education and have an average income. For the most part, Conservatives grew up in the age before the Internet. They continue to use the Internet only sporadically, which is why they spend little time writing e-mails or messaging or shopping online. Only 13 percent use social media on a weekly basis.

Their usage time on social media is low at 13 minutes per day. This behavior comes with a weak interest in technical innovations. Conservatives have fewer Internet devices and use smartphones less frequently (88%) than the population average. This low online affinity as well as the weak technical interest also have an impact on video usage. Conservatives spend a comparatively short amount of time on free (15 minutes) and paid (3 minutes) online videos.
SOCIAL MEDIA

Germans between the ages of 14 and 69 spend 15 minutes per day on average on social media. Thereof they spend 9 minutes catching up on the activities in their network. They view information, photos, and videos shared by their contacts and post comments about them. Daily social media users invest about 21 minutes on this. By contrast, the average German only spends 2 minutes on publishing information, photos, or videos about themselves. Even daily users spend barely 3 minutes on actively posting own content on the network. Professional networks do not play a major role either: Germans spend only 2 minutes per day on building and maintaining professional contacts on networks such as Xing or LinkedIn. At 5 minutes, freelancers in particular are very active in this area. For these professions, networking represents a good opportunity to find potential customers or initiate cooperation projects.

The development of a virtual relationship between people, brands, and products has long been a source of high hopes among many advertisers. The idea is that if consumers perceive brands as friends, they will search for production information and news independently and will not consider that to be advertisement. As the time budget shows this is not yet reality. Germans spend only 2 minutes per day learning about brands and products on social media platforms. Germans do not even spend 1 minute per day on online dating. However, singles do spend twice as much time on online dating – in accordance with their relationship status.

Base: A 14-69, n=1,231
Source: Media Activity Guide 2017, SevenOne Media Forsa
Every year, the media teems with reports about the latest technological trends and the next big thing. Whether connected TV, virtual reality, or voice control—all these innovations promise consumers an even better home entertainment experience. The wealth of technological innovations evokes the question: Which of these innovations will reach the mass market and which will remain niche products despite their initial hype? In the recent past, there are prominent examples for the latter, such as 3D televisions and curved TVs. In the current Media Activity Guide, we asked which innovations will gain in importance in the next few years from the point of view of the average German.
TECHNOPHOBIC BUT OPTIMISTIC FOR THE FUTURE

Germans in general tend to be technophobic. Only one fourth state that they enjoy trying out new consumer electronics devices. The growing prevalence of smartphones and tablets, however, indicate that they are not fundamentally skeptical about innovation. In recent years, these devices have reached a wide population.

Overall, the population believes that all the innovation technologies surveyed will significantly increase in importance. That is not surprising, because who wants to be considered a backwards skeptic? The broad coverage about technical innovations also has a positive impact on the perceived relevance. However, the ranking and the distance between the individual technologies are indicators regarding which innovations will be successful in the short term and which will not.

PREDICTION: HIGHEST GAIN FOR VOICE CONTROL

Germans expect that the voice control of devices will enjoy the highest increase in importance. This technology is already available in many smartphones and smart TVs today. In addition, Google and Amazon have already successfully integrated voice assistants in speakers that make everyday life easier for users. 87 percent of Germans indicate that they share very little personal information on the Internet due to data protection reasons. Despite these concerns, the survey participants can imagine that the importance of voice control will increase.

Attitudes towards data protection / consumer electronics

<table>
<thead>
<tr>
<th>Will gain in importance</th>
<th>A 14-69, in percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice control</td>
<td>88</td>
</tr>
<tr>
<td>Connected TV</td>
<td>87</td>
</tr>
<tr>
<td>UHD/4K</td>
<td>80</td>
</tr>
<tr>
<td>VR headset</td>
<td>70</td>
</tr>
<tr>
<td>Smartwatch/fitness-tracker</td>
<td>67</td>
</tr>
</tbody>
</table>

87%
“I enjoy trying out new consumer electronic devices”

27%
“For data protection reasons, I limit the amount of personal data I post on the Internet”

Although virtual reality headsets are available in stores at entry-level prices, they rank fourth in importance with only 4 percent of Germans currently using them. At the moment, however, there is a lack of concrete entertainment products suitable for the mass market. Nevertheless, a large majority of Germans believe that the importance of VR headsets will increase in the future.

CONCLUSION

- Germans are convinced that devices with voice control will gain importance in the future.
- Technologies that offer an improved television experience will also become more important.
- Virtual reality headsets are currently used only by a small minority even though there is great confidence about the future of these devices.

Source: Media Activity Guide 2017, SevenOne Media/forsa.
IN FOCUS

AUDIO USAGE

The radio is the second most frequently used medium of Germans and continues to dominate daily audio usage. 68 percent of Germans listen to radio on a daily basis, and only 5 percent do not use it at all. However, the daily usage time for radio has decreased by 27 minutes since 2014 to a current level of 102 minutes. This is not surprising, because radio has been under pressure since the music industry transitioned to digital faster and at a far earlier stage than any other entertainment industry. With the first wave of digitalization in the early 1990s, illegal file sharing platforms were created on a massive scale, which had painful consequences for artists and music labels. This made it necessary to redefine revenue models within just a few years. The easy access to unlimited audio offerings did not leave radio stations unscathed.

Most radio stations reacted to the increasing digitalization. They stream their radio programming – at times even expanded to include pure online radio stations – on the Internet or on smartphones via radio apps. This additional distribution channel is valuable for radio stations. 13 percent of daily radio usage now occurs online. Individuals aged 30 to 49 use online radio most intensively at 18 minutes per day, which accounts for one fifth of the total radio usage.

Digitalization has also changed how music is used beyond the radio. Streaming services as well as music in purely digital form, for example from iTunes, have now outpaced physical recorded music. Germans spend 28 minutes per day listening exclusively to digital music, while CDs account for only 12 minutes. This shift is even more noticeable among 14- to 29-year-olds. In this age group, individuals spend 74 minutes per day listening to music via mp3 or streaming. At 12 minutes, CDs play a minor role in this target group.
Reliable quality media is becoming increasingly important, especially in an age when anyone can publish own content on the Internet. The delivery of high-quality content, however, requires major investments. Excluding the public service media with its fee revenue, professional media is financed either through advertising or by implementing a paywall. Numerous mixed forms of various price and advertising models, however, exist between these two options.
GERMANS WANT TO USE MEDIA FOR FREE
In general, the willingness of people to spend money for media content is considered to be low. This is confirmed by the results of the Media Activity Guide: 86 percent of Germans between the ages of 14 and 69 feel it is important to be able to use media content for free. Despite this feeling, there does appear to be a fundamental willingness to pay. 50 percent of Germans indicate that it is acceptable to occasionally charge something for good content.

There are differences between the age groups: Nine out of ten of 14- to 49-year-olds want free media offerings. This target group grew up in the age of free Internet culture. Particularly in the early years of the Internet, users could access media content for free due to the lack of regulations. Nonetheless, at 56 percent, the willingness to pay for good media content is somewhat higher in this target group than in the overall population. This can be attributed to the fact that a growing number of attractive Internet offerings can be found behind a paywall. The younger generation is prepared to spend money for real added value.

GERMANS SPEND THE MOST ON PRINT
Yet on which media do Germans spend their money? We analyzed the average expenditures of everyone surveyed, including those who do not spend anything. This enabled us to make a comparison based on the total population. The 14- to 69-year-olds invest an average of 33 euros a month in media. At 9 euros per month, subscriptions to printed newspapers and magazines account for most of that money. By contrast, Germans spend on average only 50 cents per month on digital print subscriptions. Consumers also spend a great deal on videos. On average, they spend more than 14 euros per month for video content on DVDs, for pay TV, HD TV, and video on demand.

A look at different age groups shows clear differences in media spending. 14- to 29-year-olds pay 9 euros per month on computer games. At 15 euros, total video expenditures are above average in this target group. Pay TV in particular is a topic for the financially strong 30- to 49-year-old group. With an average spending of 5 euros per month, they spend roughly twice as much on this as other age groups. Overall, this age group invests nearly half of its monthly media budget of 35 euros on DVDs, pay TV, HD TV, and other video products, which underscores the importance of video in this target group. On the other hand, 50- to 69-year-olds spend significantly more money on print products. In this age group, the monthly expenditures for print subscriptions come to an average of 15 euros. Spending behavior differences can be seen in more areas than just between age groups. Men spend a total of 12 euros more per month on media than women. They are much more likely to spend money on digital games. Women spend on average only 1 euro on digital games, compared to men, who spend an average of 7 euros on gaming.

### Ø monthly expenses for media usage

<table>
<thead>
<tr>
<th>A 14–69, in euros</th>
<th>A 14–29</th>
<th>A 30–49</th>
<th>A 50–69</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase of DVDs/Blu-rays/video cassettes</td>
<td>3.9</td>
<td>2.8</td>
<td>2.6</td>
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<tr>
<td>Pay TV</td>
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<td>0.5</td>
<td>0.6</td>
</tr>
<tr>
<td>SVOD***</td>
<td>14.7</td>
<td>14.7</td>
<td>14.7</td>
</tr>
<tr>
<td>Other video*</td>
<td>6.6</td>
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<td>6.6</td>
</tr>
<tr>
<td>Print subscriptions</td>
<td>8.6</td>
<td>8.6</td>
<td>8.6</td>
</tr>
<tr>
<td>Computer games/game apps</td>
<td>6.6</td>
<td>6.6</td>
<td>6.6</td>
</tr>
<tr>
<td>Other**</td>
<td>6.6</td>
<td>6.6</td>
<td>6.6</td>
</tr>
</tbody>
</table>

*Other video: TVOD, rental of DVDs/Blu-rays/video cassettes, TV channels in HD. **Other: online storage, digital print subscriptions, apps, music streaming, music downloads. ***SVOD: subscription video on demand, i.e. online videos in a subscription model. Base: A 14–69, n=1,231.

Source: Media Activity Guide 2017, SevenOne Media/forsa.

### Attitudes towards the willingness to pay

<table>
<thead>
<tr>
<th>A 14–69, in percent, top 2*</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I feel it is important to be able to use media content for free”</td>
</tr>
<tr>
<td>“I don’t mind paying for good media content from time to time”</td>
</tr>
</tbody>
</table>

*Scale of 1 to 6, where 1=agree completely and 6=do not agree at all

Base: A 14-69, n=1,231

Source: Media Activity Guide 2017, SevenOne Media/forsa.
Along with print and videos, Germans also spend money on music. 11 percent pay for the usage of streaming services such as Spotify and Deezer, on average 9 euros per month. More than half of music subscribers are under 30 years old.

**CONCLUSION**

- 86 percent of 14- to 69-year-olds think it is important to be able to consume media content for free.
- At the same time, 52 percent of this same age group is willing to spend some money for good media content.
- The expenditures for video usage (e.g. DVDs, HD-TV) are higher than for print.
- Clear age-related differences can be observed: Younger individuals spend more money on games. Pay-TV spending is much higher among 30- to 49-year olds.

### € monthly expenses for media usage

A 14-69, averages; in euros

<table>
<thead>
<tr>
<th>BASE: All Germans</th>
<th>Individuals who pay for a specific medium</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.2</td>
<td>Print subscriptions</td>
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<td>5.2</td>
<td>Purchase of DVDs/Blu-rays/Video cassettes</td>
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<td>Pay TV</td>
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<td>TV channels in HD</td>
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<td>0.8</td>
<td>Rental of DVDs/Blu-rays/Video cassettes</td>
</tr>
<tr>
<td>0.8</td>
<td>TVOD**</td>
</tr>
<tr>
<td>0.9</td>
<td>Purchase of apps</td>
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<tr>
<td>0.5</td>
<td>Digital print subscription</td>
</tr>
<tr>
<td>0.4</td>
<td>Online storage</td>
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</tbody>
</table>

**SVOD**: subscription video on demand, i.e. online videos in a subscription model;  
**TVOD**: transactional video-on-demand, i.e. payment for individual online videos

Media is often used simultaneously with other activities. Only so people can spend an average of 580 minutes per day on media while also finding enough time for other activities, such as working, eating, and sleeping. Multitasking is also widespread while watching television and is not a new phenomenon. In the meantime, however, the Internet has replaced newspapers and magazines as the most widespread parallel medium used while watching television. In 2014, 49 percent of individuals used the Internet in while watching TV, and that figure has risen to 65 percent in 2017.

Household activities are the most frequent secondary activity while watching television. More than three quarters of Germans between the ages of 14 and 69 carry out some sort of chores at least rarely while watching TV. In 2014 that figure was 64 percent. At 71 percent, talking on the telephone is the second most frequent activity that occurs while watching television. This reflects the acceleration of our society. A growing number of people are under permanent time pressure, whether real pressure or only perceived. As a result, they are increasingly dealing with trivial activities while the television is on.

There has been a tremendous increase in the prevalence and usage of mobile devices in recent years. A growing number of individuals are using these devices more and more frequently while watching television. This represents an opportunity for advertisers. Viewers can search for and potentially even purchase a product immediately when they see an advertisement on TV. 53 percent of viewers use their smartphone at least rarely to surf the Internet while they watch television (2014: 32%). This makes smartphones the most-used device ahead of TVs. Usage of tablets has also increased by 18 percentage points since 2014. One third of all Germans today use a tablet at least rarely whilst watching TV. At 6 percentage points, the growth in notebook usage is much lower. Stationary PCs are not particularly convenient as a second screen, and that fact is reflected in the low usage level.

Second screen usage of TV and Internet devices
A 14-69, in percent, usage at least rarely

<table>
<thead>
<tr>
<th>Device</th>
<th>2014</th>
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<th>2016</th>
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<tr>
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<td>PC</td>
<td>14</td>
<td>13</td>
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</tbody>
</table>

Base: A 14-69, 2014: n=1,230; 2015: n=1,246; 2016: n=1,226; 2017: n=1,231
Source: Media Activity Guide 2017, SevenOne Media/forsa.
BEST AGERS

After their children leave the nest, the so-called Best Agers enter a new life stage during which they discover new possibilities for leisure activities and consumption. Regarding the digital lifestyle, 50- to 69-year-olds have now caught up. Their media usage has significantly increased overall. As a result, this age segment represents an interesting target group especially for the advertising industry.
BETWEEN CHILDREN AND RETIREMENT

The target group of 50- to 69-year-olds is frequently referred to as Best Agers. This life stage is generally characterized by the fact that, during these last years of employment, new activities open up for Best Agers after their children have moved out. Best Agers have both more time and more money at their disposal. Although age groups rarely represent a homogeneous sector of the population, this stage between the “empty nest” and retirement is very characteristic: 63 percent are employed part-time or full-time. At 27 percent, the share of retirees is still relatively low, with the majority of them between the ages of 60 and 69. Nearly half are married. In the unmarried group, divorced individuals are exceptionally well represented at 23 percent. Overall, at 41 percent, single households are slightly over-represented in this stage of life. The share of two-person households is roughly as large. Only 5 percent of Best Agers still look after children in their household. In this life stage, most children have already moved out. Among Best Agers, there is a particularly high proportion of heads of households at 83 percent. There are somewhat more households with a low income than in the overall population. This can be attributed on one hand to the higher share of single households and, on the other, to the slightly lower income of retirees.

MOBILE IS CATCHING UP

In the last three years, 50- to 69-year-olds have caught up especially when it comes to the use of mobile devices. Although the share of tablet users was nearly 40 percent below the average of 14- to 69-year-olds in 2014, it has almost caught up in 2017. 44 percent of Best Agers now use a tablet computer. At 70 percent, the usage of smartphones is still significantly below the average, possibly due to the much smaller displays. The usage of other device categories is generally on average. Only game consoles with 7 percent find very little appeal among Best Agers. On the other hand, smartwatches and fitness wristbands have caught on at a speed similar to other age groups and are used by 7 percent of Best Agers. One cause for this is the growing awareness regarding a healthy lifestyle, which has become particular pronounced among Best Agers.

At the same time, Best Agers are not very open-minded when it comes to technical innovations. 85 percent indicate that they are reluctant to try out new consumer electronics devices. The smartphone does not play a very important role. 71 percent can easily imagine spending a day without a smartphone. This older target group, however, gives the importance of future technologies a largely similar rating as the whole population (see p. 28). Although they are well aware of technical progress, they only adopt the innovations that they find useful and interesting for their own everyday lives.
TRADITIONAL REMAINS, DIGITAL CATCHES UP

The media usage of 50- to 69-year-olds is very easy to characterize: Traditional media is widespread and widely used. On the other hand, this age group uses digital media such as online videos, video on demand, and computer games still relatively little as compared to 14- to 69-year-olds. Nevertheless, they have clearly caught up in the last three years: The share of users of free online videos climbed from 31 to 47 percent. With regard to paid video-on-demand services, the share rose from 5 to 12 percent. Even the reach of digital games increased in this target group from 32 to 46 percent.

TELEVISION USAGE INCREASING

The usage time for nearly all media has significantly increased in the 50- to 69-year-old age group since 2014. Television usage grew from 315 to 344 minutes per day and thus accounts for 97 percent of video usage and 54 percent of overall media usage. Free online videos increased from 2 to 5 minutes. In 2014, paid video-on-demand services were nearly non-existent in this target group, whereas this group now spends 2 minutes on average on these services. Overall, however, online videos represent only a niche among Best Agers compared to the total population. The average German spends four times as long on online video usage as 50- to 69-year-olds. When it comes to films and series, an above-average number of people (56%) rely on curated content of the television networks. On the other hand the willingness to pay for media content is rather low.

Only traditional media demonstrates a comparatively high usage. Best Agers spend on average 30 minutes per day reading newspapers and 13 minutes on magazines. At 127 minutes in 2017, compared to 130 minutes in 2014, daily radio usage has remained nearly constant.

INCREASING INTERNET USAGE

50- to 69-year-olds today are spending nearly twice as much time on the Internet compared to 2014. At 45 minutes, the usage of Internet content is far below the average of 89 minutes. Only in the areas of Internet shopping (7 minutes) and managing financial transactions (3 minutes) are the 50- to 69-year-olds nearly equivalent to the overall population. Furthermore, the older age group has also made significant gains in the area of individual communication. In the past three years, e-mail correspondence has more than doubled from 19 to 41 minutes. Messenger usage increased to a similar extent from 4 to 11 minutes. Communication as a whole accounts for 96 minutes, only 20 percent less than the German average.

CONCLUSION

• After their children leave the nest, 50- to 69-year-olds have more time and money at their disposal and are thus an interesting target group for advertisers.
• Traditional media continues to have a high relevance; television in particular dominates media usage.
• Best Agers are increasing their media usage in nearly all areas, although they are still well below average regarding the Internet usage and especially in the area of free online videos and video on demand.
• On the other hand, this group is catching on quickly when it comes to equipping themselves with mobile devices, especially tablet computers.
The Media Activity Guide has been documenting media usage in Germany for four years. A great deal has occurred in this time period alone. Mobile devices such as smartphones have reached the masses. Innovative devices such as VR headsets and smartwatches have been launched on the market. And the digitalization of the media is opening up an increasing number of ways that people can use media to shape their everyday lives.

In 2017, 93 percent of Germans between the ages of 14 and 69 are online, and that figure rises to 99 percent for the age group under age 50. The sheer volume of available content is greater than ever – and that explains why the amount of time spent by people on media every day is growing steadily. This trend is not limited to just younger age groups: Media and device usage is growing even among Best Agers. And there is hardly an end in sight: The majority of Germans believe that technologies will continue to grow in importance.

The huge variety of possibilities, however, is increasingly accompanied by confusion and a lack of transparency. Thus uncertainty in the population is growing. Most Germans are concerned about the trustworthiness of media. They question the reliability of digital media in particular. These concerns add to the value of traditional media with its professional productions and carefully researched facts. This explains why traditional media, and television in particular, will continue to play an important role in the German population.
METHODOLOGY

POPULATION
German-speaking population, aged 14 and older, in households with a landline or mobile telephone, Germany.

SAMPLE:
Representative random sample, dual frame in accordance with ADM recommendation (70% landline, 30% mobile)

SAMPLE SIZE:
3,004 cases

TYPE OF SURVEY:
Telephone interviews (CATI)

EVALUATION:
Statements regarding the total population refer to 14- to 69-year-olds

FIELD TIME:
March 1, 2017 to March 28, 2017 (Monday to Sunday)

FIELD WORK:
for.sa.

WEIGHTING:
Region, gender, age

ADJUSTMENT:
Linear TV and time-shifted TV, adjusted to AGF/GfK, Monday to Sunday, 3:00 a.m. to 3:00 a.m. (Q1 2017)