

Minute by minute: How do global digital consumers spend their tech time?



This is the first of five articles derived from McKinsey’s iConsumer survey, an annual survey that tracks changing consumer behavior for different digital experiences.

Look around you on the subway, in the park, even behind the steering wheel—and it might seem that people everywhere, almost all the time, are glued to their technology—nose to screen, fingers a blur of tapping.

McKinsey decided to test such subjective observations with rigorous empirical analysis. Every year since 2008, we have conducted a wide-ranging survey of at least 5,000 Internet consumers (aged 15-64) in selected countries. This body of research, which is among the most extensive available on the subject, allows us to track changing digital habits and to anticipate future directions.

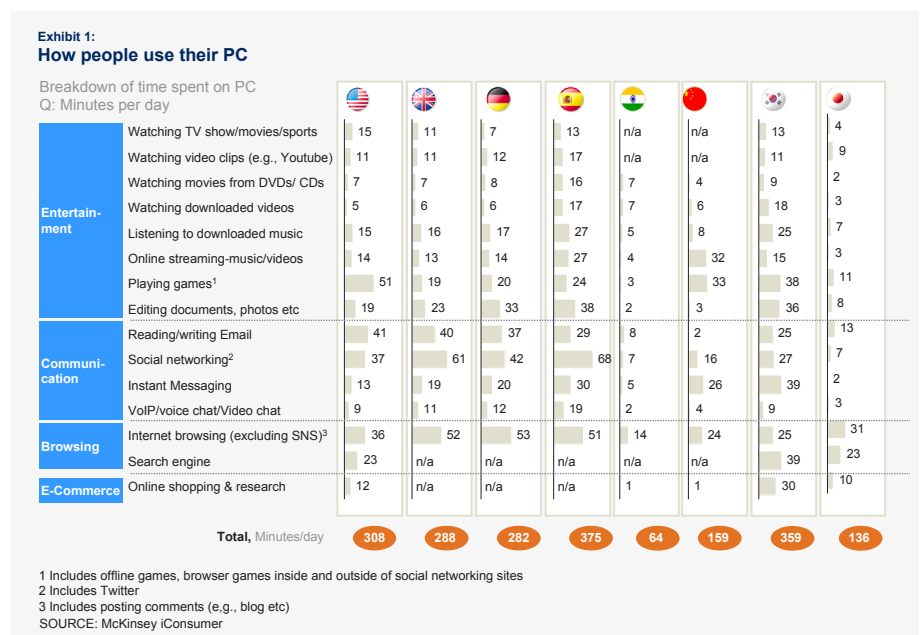
In the following article, we discuss our findings about how people spend their tech time. In subsequent ones, to be posted daily, we will dig a little deeper into the specifics, looking at patterns in phone usage, online shopping, video—and the surprising state of Japan.

Time matters

What do the US, Spain and Korea have in common? Not much, at first blush. But to a startling degree, they share similar behavior

when it comes to how they use their personal computers. Not only do they spend by far the most time attached to their PCs—more than five hours a day—but what they do online is also comparable. For example, the Internet users surveyed showed broad similarities in how much time they spend watching TV, watching video, downloading music and online streaming.

There are differences, too, of course. Americans, by far, spend the most time playing games (51 minutes), while the Koreans are second and the Spaniards a distant fourth, behind China (33 minutes). Moreover, while users in the US and Korea spend a similar amount of time on social networks (37 and 27 minutes, respectively), that is far behind the Spaniards (68



minutes). And the Koreans are much more avid online shoppers, spending half an hour a day browsing through the Internet malls.

Among the other participants in this year's survey, the British and the Germans are almost twins—closely related to each other and distinct from everyone else. Not only do they spend almost the exact same amount of time on their PCs (a little under five hours), but they do the same things for almost the same amount of time. There are only two exceptions. In the 15 different categories surveyed, the British spent much more time on social networks (61 versus 42 minutes for the Germans) and much less time on editing (23 minutes versus 33).

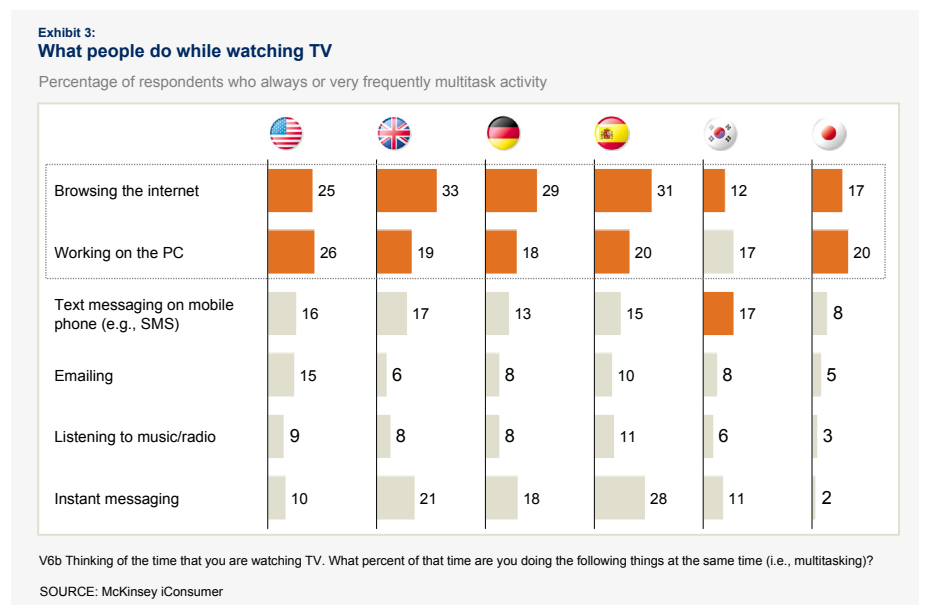
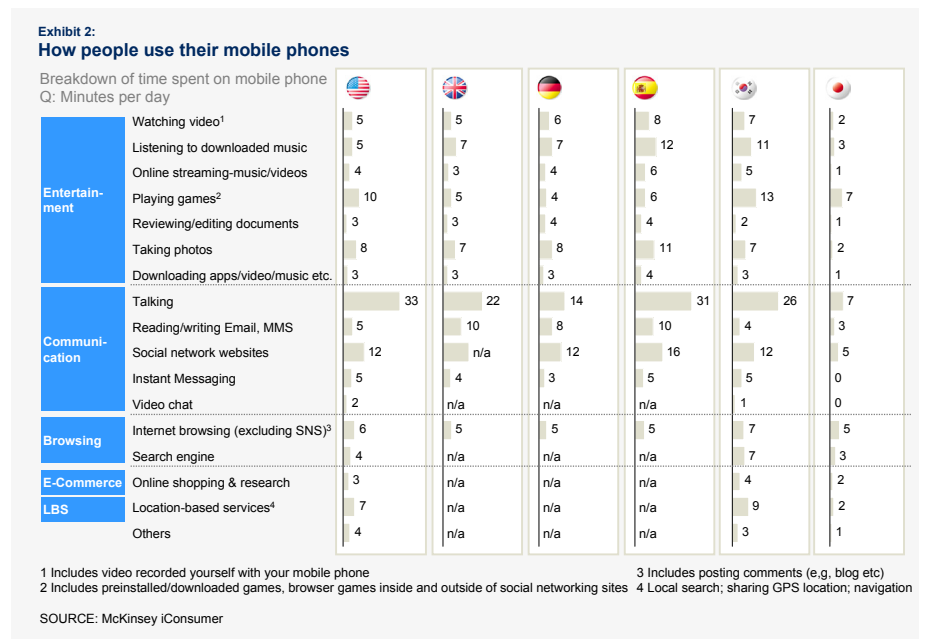
As for the rest of the countries surveyed, India is the outlier, with its Internet users spending only an hour or so a day online. Japan and China have many striking similarities and almost as many big differences (ie, Japan likes email, China IM), which is not a bad analogy for the countries as a whole.

Interestingly, the same patterns pertain when it comes to how people in different countries use their mobile phones. The US is again most similar to Spain and Korea—and this time the only significant difference in 17 different categories is that the Koreans play many more games than the Spaniards, and the Spaniards spend more time on email than the others.

The uses of diversity

Across the whole spectrum, the most striking characteristic the survey reveals is the lack of commonality across all eight countries.

The Internet is universal and the PC is ubiquitous; still, nations remain different. No two countries have the same top three PC uses, for example, and none have the same two in order. Even when it comes to



the simplest of behaviors – what you do after logging on – there is no universality: While most people check email, the Koreans go to a portal.

Ditto when it comes to media multitasking. The countries surveyed are essentially split down the middle on what their residents do while watching TV, with half reporting their most common activity was browsing the Internet and

half working on their PCs. The British, Spaniards and Germans are also apt to take the opportunity for some quick instant messaging, while Koreans and Americans prefer texting while watching.

The lesson? Think global and act local.