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Digital Consumer Trends 2022

The Scandinavian ‘cut’

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About the research

The Scandinavian data ’cut’ is part of Deloitte’s Global Digital Consumer Trends survey, a multi-country survey of digital service users worldwide. The 2022 global study comprises 36,150 respondents across 21 countries and four continents.

Data cited in this report are based on a nationally representative sample of consumers aged 18-75 in Sweden (2,000), Norway (1,000) and Denmark (1,000). The sample follows a country-specific quota on age, gender, region, and working status. The survey took place during July 2022 and was carried out online by Ipsos MORI, an independent research firm, using a question set provided by Deloitte.

Chapter 1

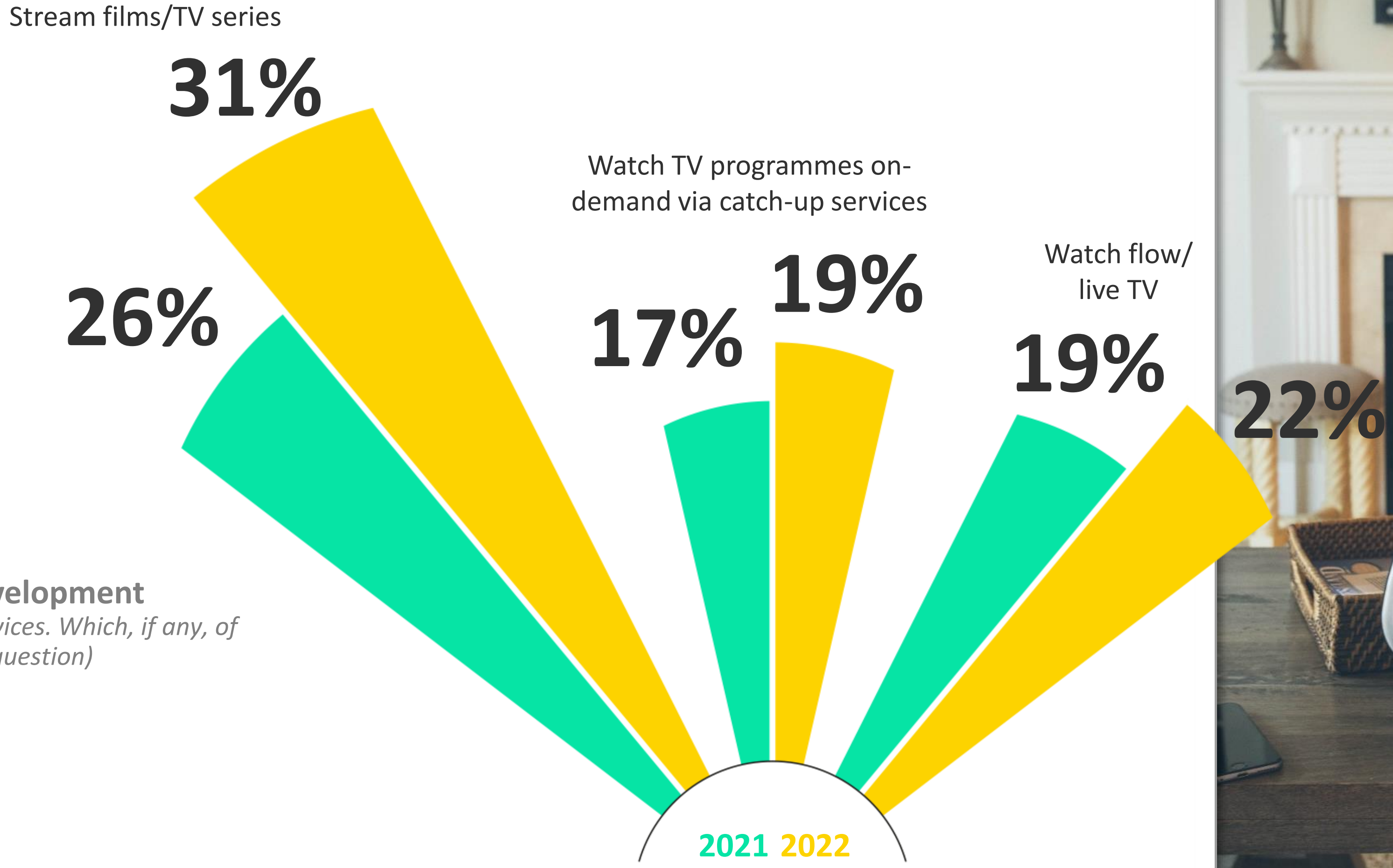
The appetite in Scandinavia for on-screen entertainment is almost insatiable, even after lockdown

81% of Scandinavians now have access to at least one subscription video-on-demand service compared to 68% in 2021. Even the numbers watching traditional TV are on the rise.

Attentiveness to customers has paid off

The competitive strategies employed by the various providers appear to have paid off.

31% of all respondents now stream films and/or TV series at least once a day, 19% watch TV programmes on-demand via catch-up services daily, and 22% watch live TV, figures which are all higher than last year.



Daily on-screen entertainment: Yearly development

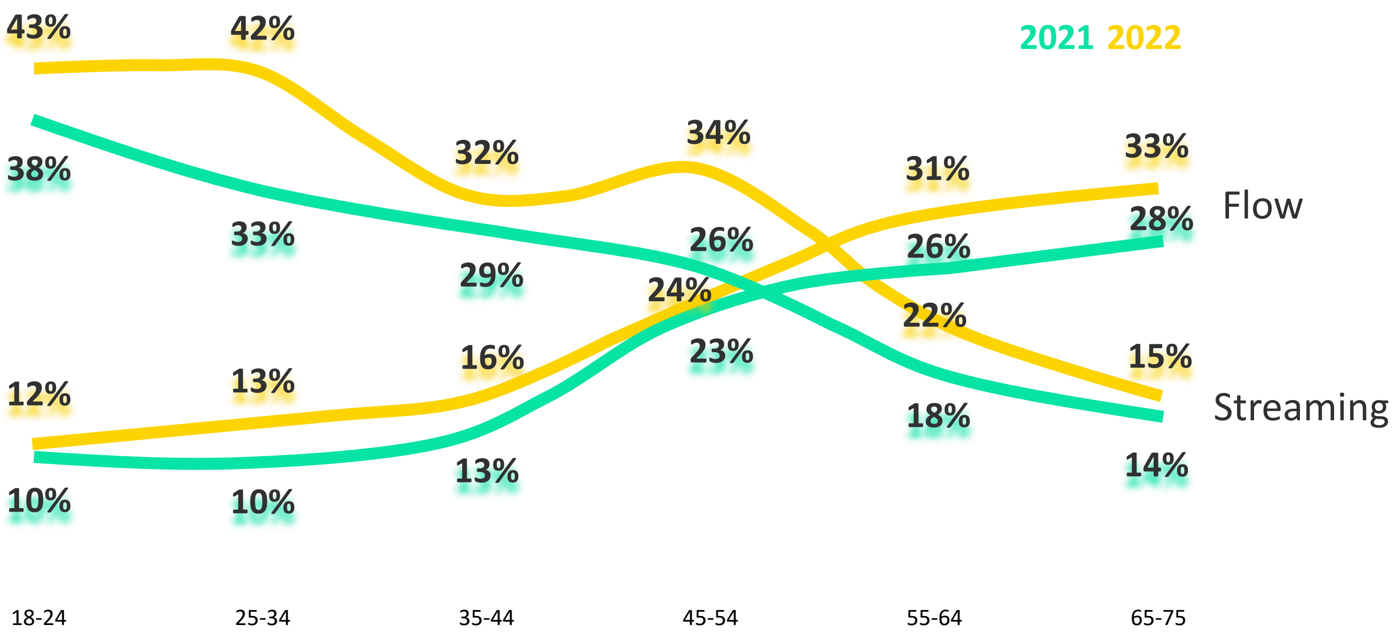
Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day? (Multiple choice question)

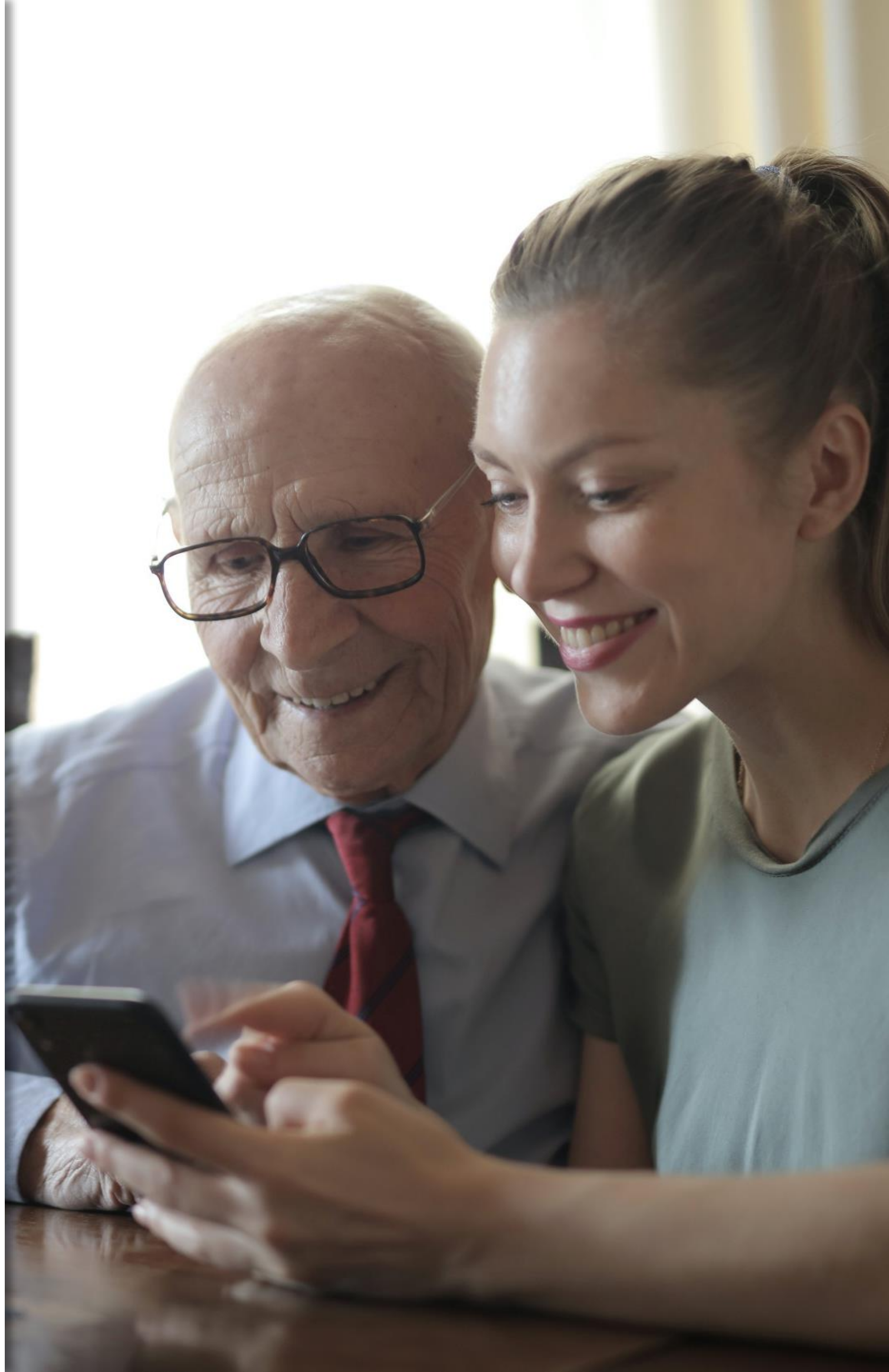
Attentiveness to customers has paid off

There is a significant age difference when it comes to entertainment habits, with older people being more likely to watch linear TV, and younger people more likely to use streaming services. Surprisingly, however, linear TV is on the rise for all age groups in this year's survey results, compared to the previous year.

Usage of linear TV and video streaming: Age

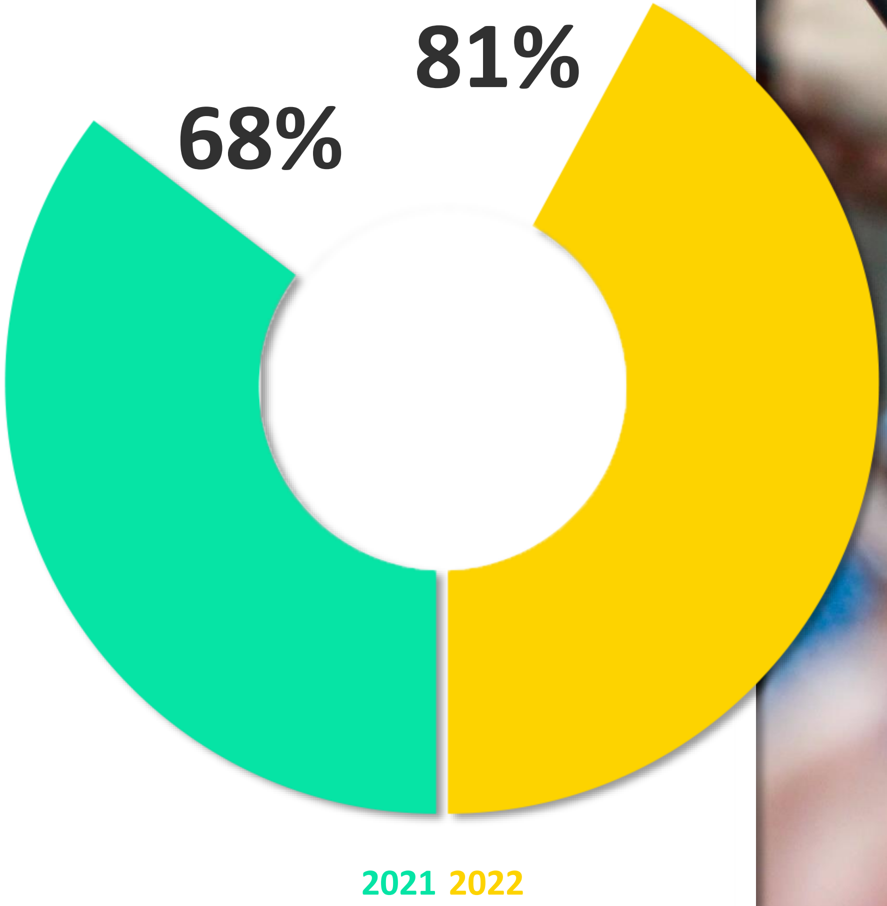
Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day?





More access, more subscriptions

The increased appetite for on-screen entertainment is clearly visible in the numbers for subscription video-on-demand (SVOD) services. 81% of Scandinavians now saying that they have access to at least one SVOD service, compared to 68% in last year's survey, a massive increase that puts Scandinavia among the top regions when it comes to streaming services.



Access to SVOD services: Yearly development
Which, if any, of the following digital subscription services do you have access to? (Respondents who have chosen at least one video streaming service).

More access, more subscriptions

Among those who subscribe to at least one SVOD service, the number of subscriptions in Denmark and Norway has also increased, from 2.9 last year to 3.2 in this year's survey.

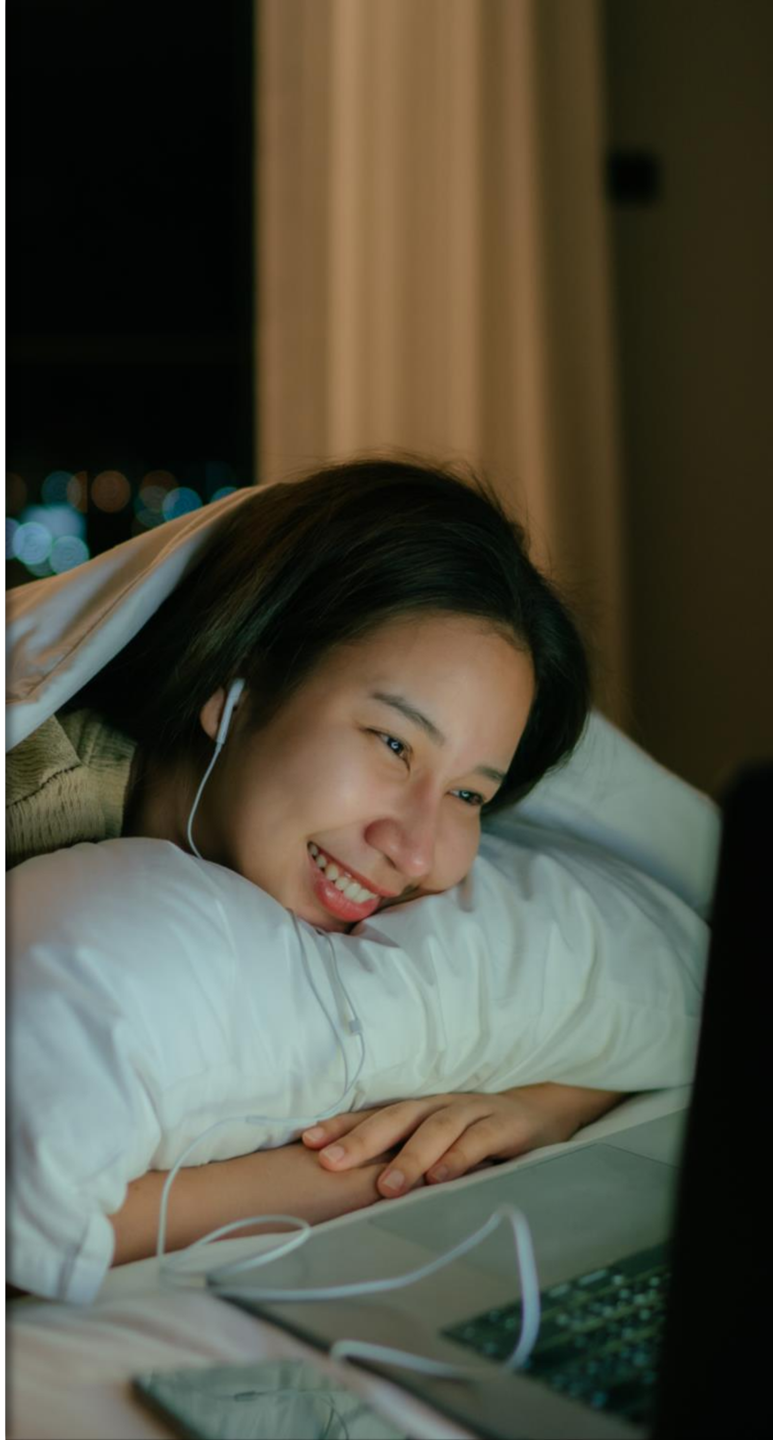
This indicates a desire to access whatever platform seems most attractive at the moment. 34% of respondents say that they are either new subscribers or re-subscribers to an SVOD service, up from 31% last year.

Number of SVOD services per person: Yearly development

Which, if any, of the following digital subscription services do you have access to? (Average number of video streaming services that the respondents have access to) Note: We only have numbers available for Denmark and Norway. Therefore, Sweden is not included in the figure.

3.2
2022

2.9
2021

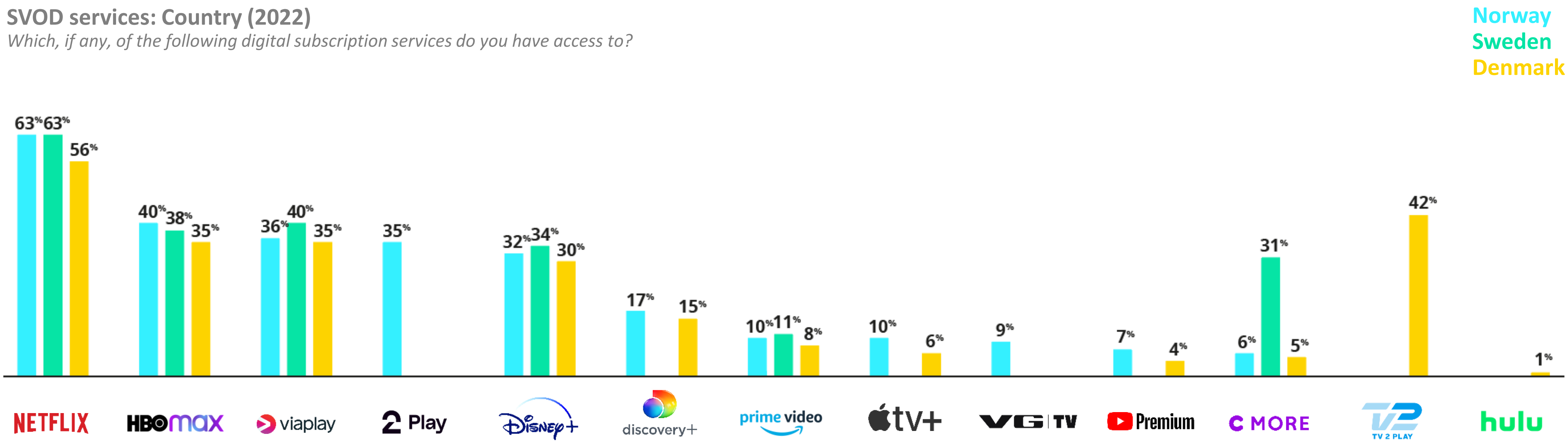


Netflix wears the crown (as well as showing it)

While international media outlets have reported Netflix's problems with retaining subscribers, Scandinavian customers continue to put Netflix at the top of the pyramid with 59% of all respondents saying that they have access to the service, significantly outperforming any other streaming service.

SVOD services: Country (2022)

Which, if any, of the following digital subscription services do you have access to?

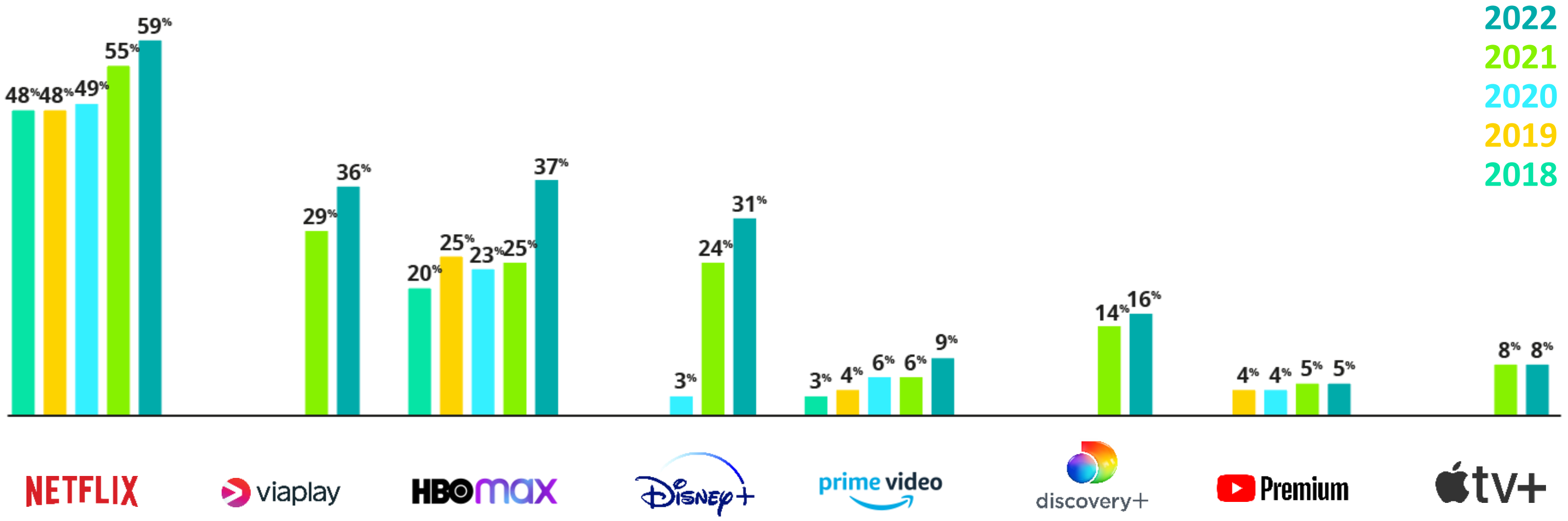


Netflix wears the crown (as well as showing it)

Netflix is not the only provider to enjoy growing success in the Scandinavian market. The numbers for HBO Max, Disney+ and Viaplay especially are also favourable, with subscriptions up significantly from last year's survey.

SVOD services: Yearly development

Which, if any, of the following digital subscription services do you have access to? Note: We only have numbers available for Denmark and Norway. Therefore, Sweden is not included in the figure.

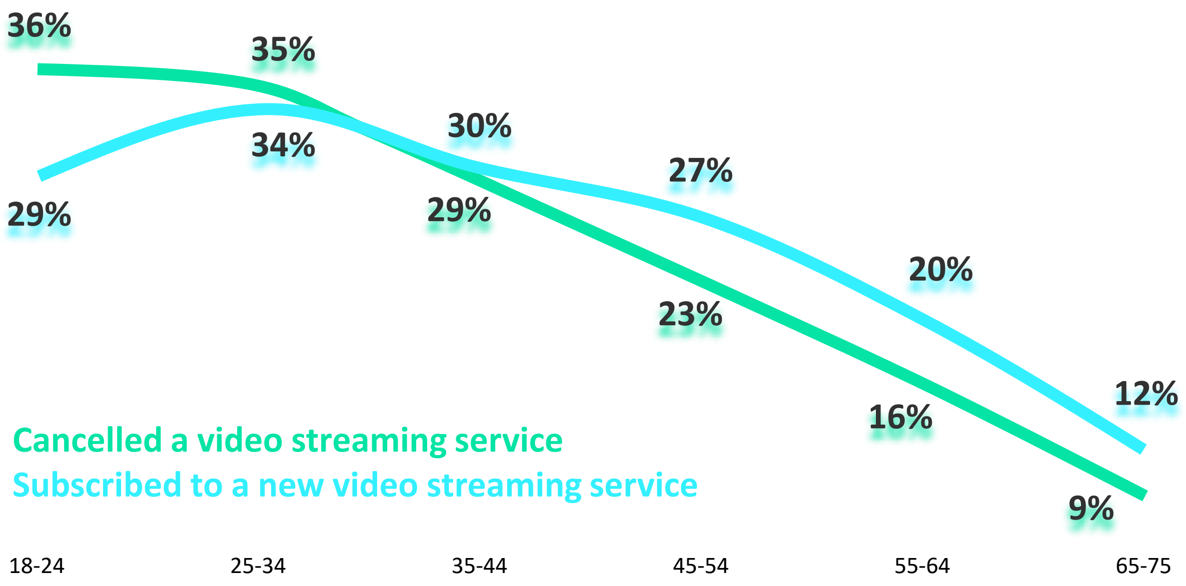


More people cancel

It may seem that the sky is the limit when it comes to providing content for Scandinavian consumers. But more people are cancelling subscriptions, for either short or longer periods.

Overall, 25% of respondents in this year's survey say that they had cancelled a subscription during the past 12 months.

Cancelling subscriptions: Age (2022)
In the last 12 months, have you or someone else in your household subscribed to any paid subscriptions for a video streaming service (e.g. Netflix, Disney+), or cancelled any existing ones? (Multiple choice question)

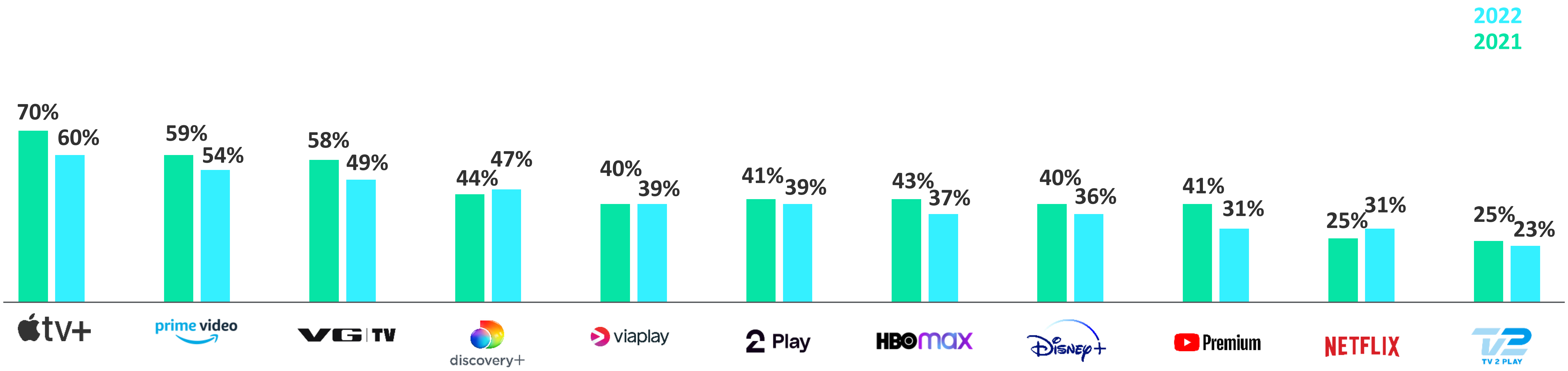


More people cancel

Different providers are experiencing very different levels of churn. Brands with lower market penetration are seeing higher churn, while established providers have customers who are more loyal.

Brand-specific churn intention

Which, if any, of the following paid subscriptions for video streaming services have you already considered cancelling, which would you consider cancelling in the future and which are you unlikely to cancel? (Respondents who chose “Have already considered” or “Would consider cancelling in the future”)

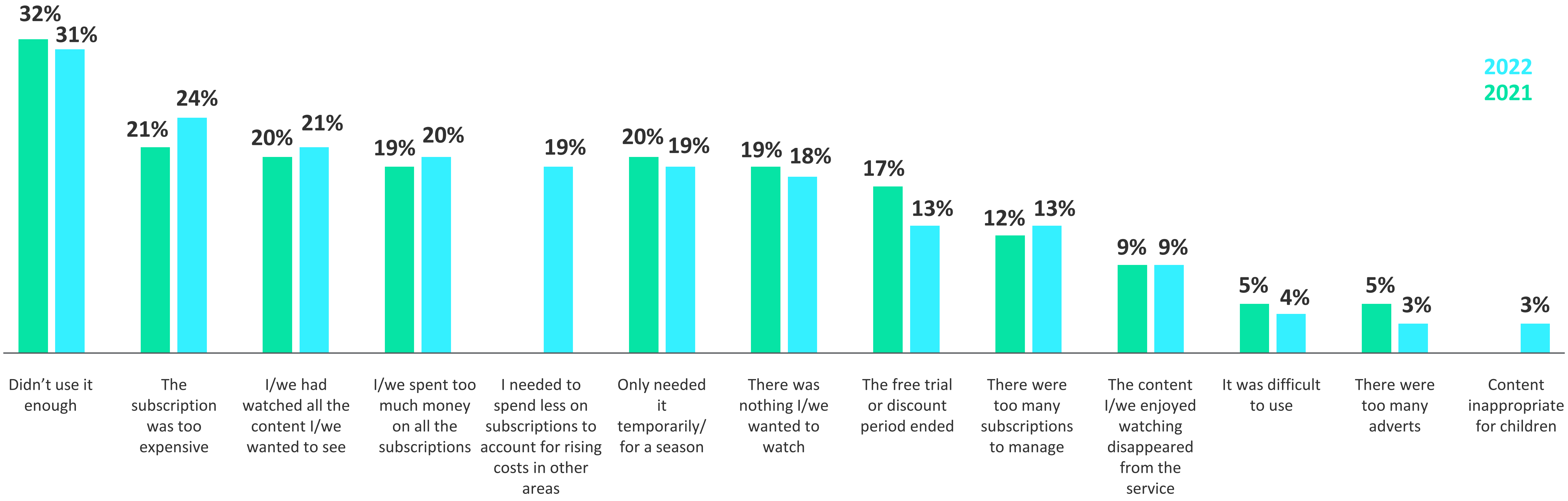


More people cancel subscriptions

Looking at the reasons for churn, 31% feel that they didn't use the streaming service enough, while 54% mention price considerations.

Reasons for customer churn (2022)

You mentioned you have cancelled a paid subscription for a video streaming service in the last 12 months. Why did you cancel? (Multiple choice question)



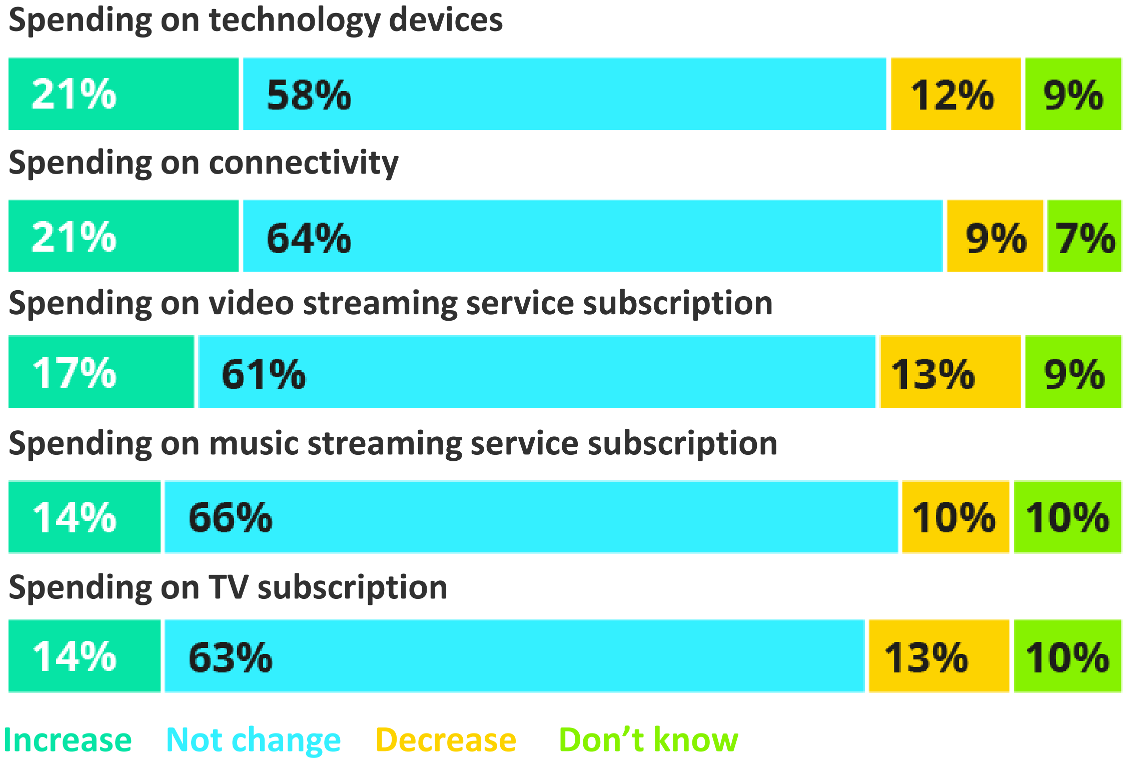
No cost-cutting on streaming

Almost one in five consumers are willing to increase their spending on video streaming and 13% expect to spend less. 61% are planning to keep spending at current levels.

However, current inflationary pressures and the energy crisis could potentially affect demand, and we are yet to see whether these events will force people to cut down on subscriptions.

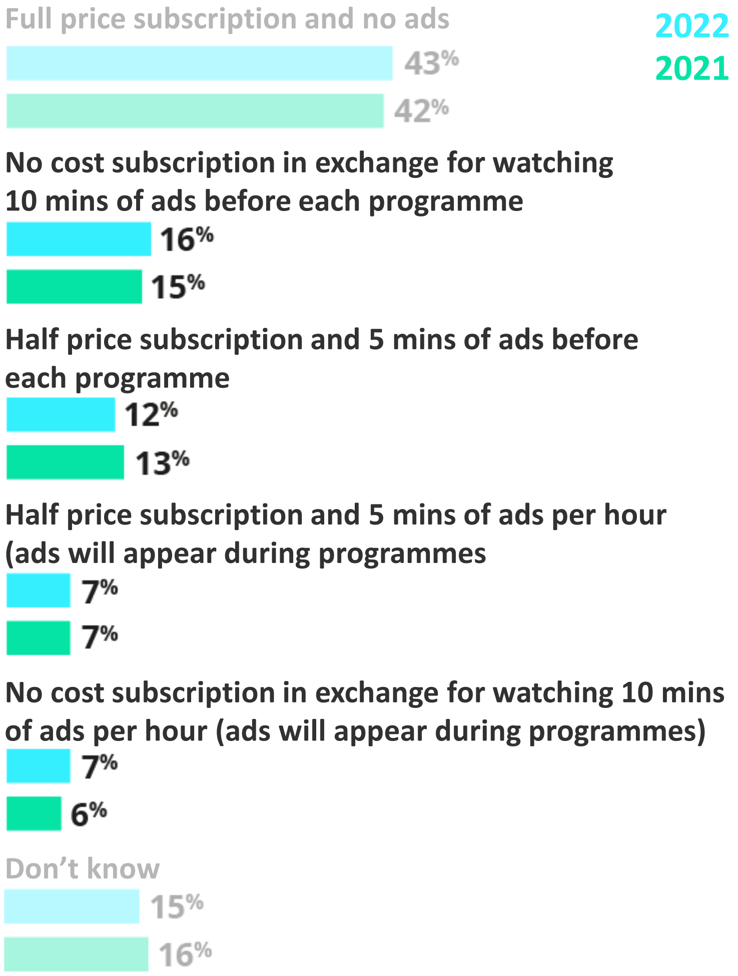
Spending in 2022

Compared with 2021, would you say that your spending on the following will increase, decrease, or stay the same in 2022?



Strong appetite for low-cost subscription

42% of respondents say that they would prefer one of the AVOD models (no cost subscription or half price subscription in exchange for ads) as a payment option.



SVOD versus AVOD

If a streaming service offered the following payment options. Which would you prefer?

Shared-use: New demands for streaming providers?

52% of people streaming use other people’s login information, and 12% do so daily. Among young people aged 18-24, 75% uses other people’s login information, something to alarm any subscription provider.

Usage of other people’s streaming subscription (2022)
How often, if at all, do you use the video streaming subscription login details of friends or family members not living in your household?

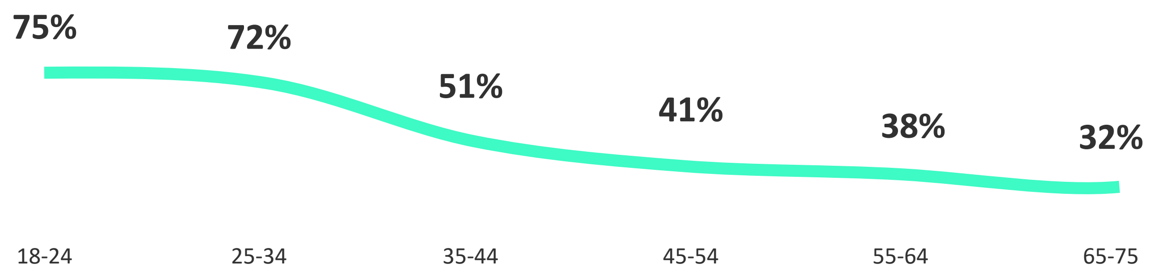
52%

Uses other people´s streaming subscription

12%

Uses other people´s streaming subscription on a daily basis

Usage of other people’s streaming subscription: Age (2022)
How often, if at all, do you use the video streaming subscription login details of friends or family members not living in your household? (Respondents who chose "At least once a day", "At least once a week", "At least once a month" or "Less often")



Chapter 2

Few smartphones are bought second-hand, but the market could pick up speed

Most smartphones still end their lives in the drawer of a Scandinavian home. However, new buying patterns could change that.

Purchasing new phones

In Scandinavia, 88% of phones are bought new. Looking outside Scandinavia, the percentage figure is a bit higher in The Netherlands, Belgium, Italy and Japan, but lower in Austria, Canada, Germany, the UK and Argentina.

The slow uptake in recycling smartphones may seem surprising given the focus on sustainability and sustainable buying patterns.

Purchase of new phones (2022)

When you got your current phone, was it new or used?
(Respondents who chose "New")

95% Japan

93% Italy

91% Belgium

89% The Netherlands

88% Scandinavia

85% Austria

85% Canada

85% Germany

84% UK

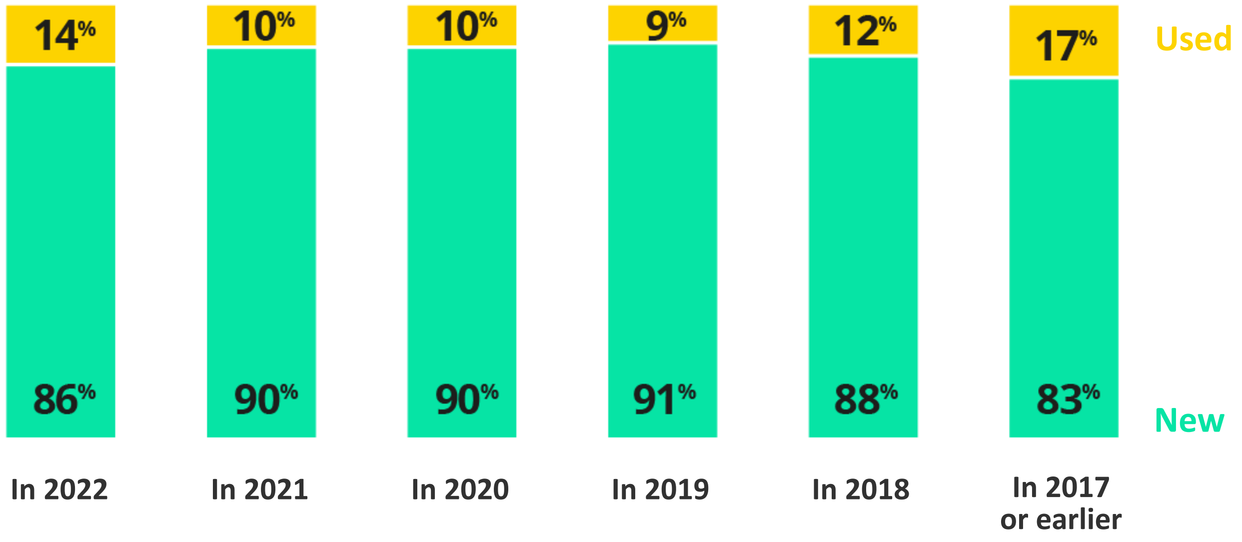
84% Argentina

Shifting focus through the years

Among consumers who bought their current phone in 2017 or earlier, 17% obtained or bought it used or refurbished. The number is down to 9% for those who bought their current phone in 2019, and up to 14% for those who bought their current phone in 2022.

Purchase of current phones

When you got your current phone, was it new or used?



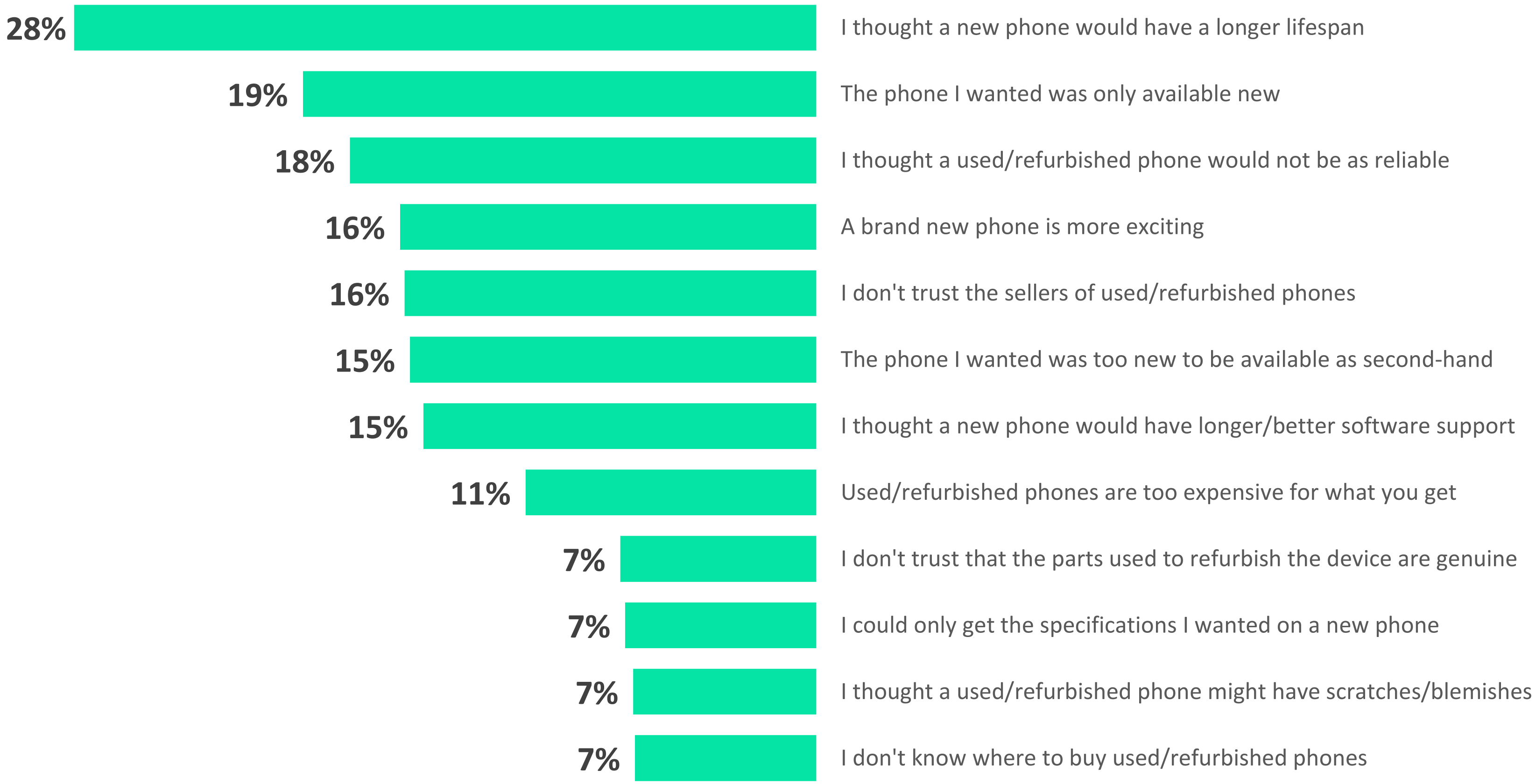
Consumers are concerned about the life span of their phone

28% of respondents who bought a new phone say that they believe it will have a longer lifespan than a used one.

19% say that they specifically wanted a model that was only available new, and 18% think that a used or refurbished phone is less reliable than a new one. Interestingly, only 7% worry about used smartphones having scratches or blemishes.

Reasons for getting a new phone (2022)

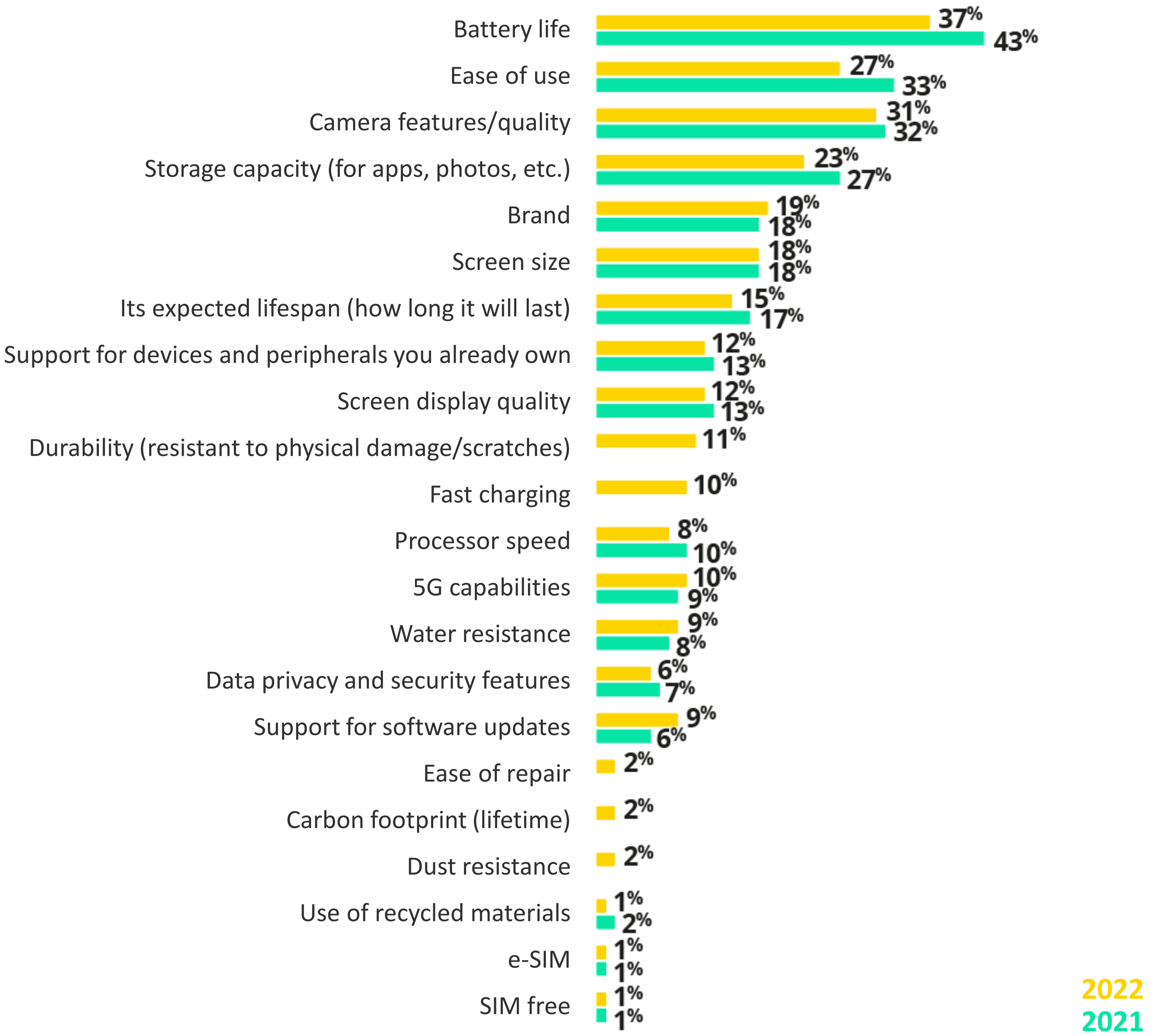
Why did you get a new phone and not a used/refurbished one? (Multiple choice question)



Excuse me, where can I charge?

When deciding what smart phone to purchase, battery life is the main consideration, although camera features and quality are an increasingly close second.

Just 2% of consumers highlight carbon footprint as an important factor in their decision to buy a particular smartphone, 2% focus on ease of repair, and only 1% recognise the value of recycling materials and products.



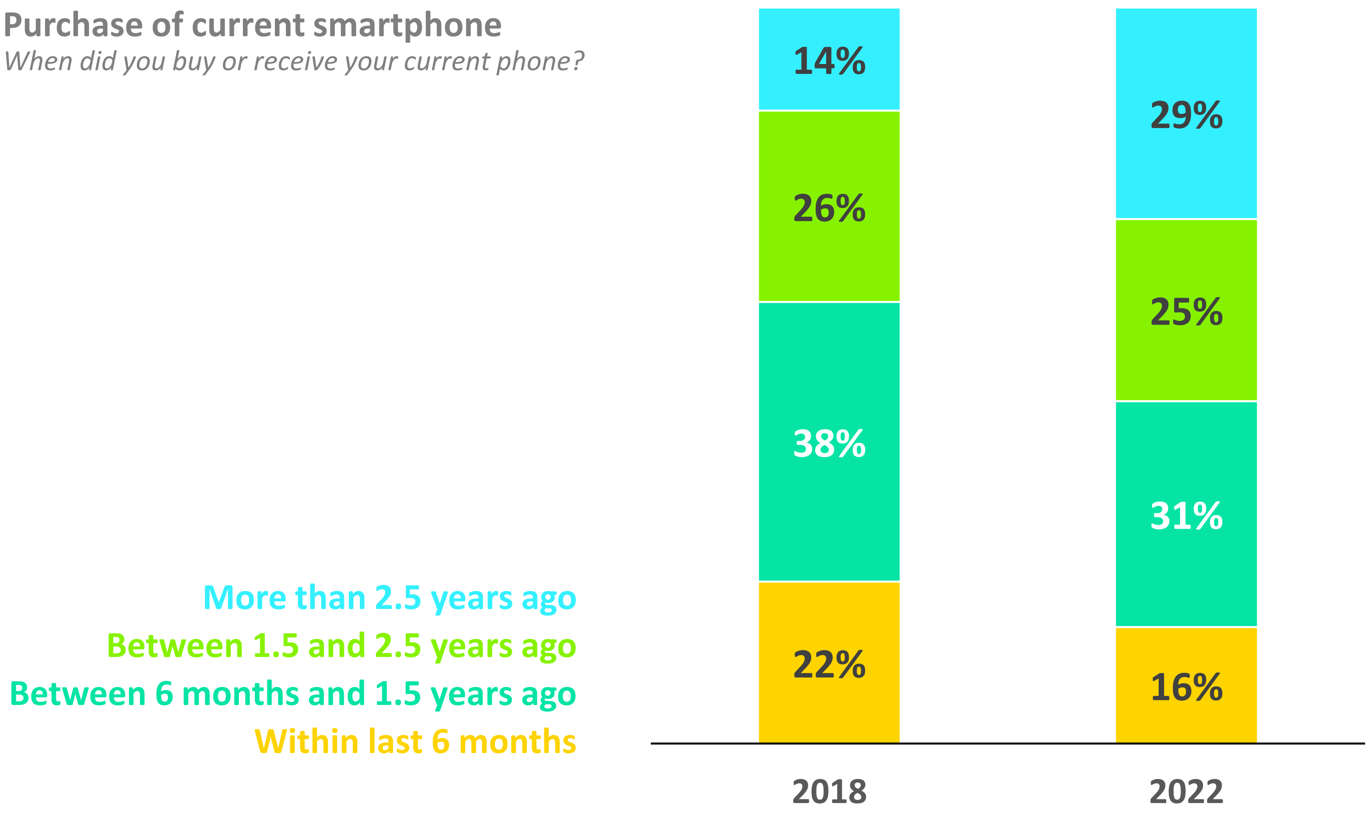
Most important features when buying a smartphone

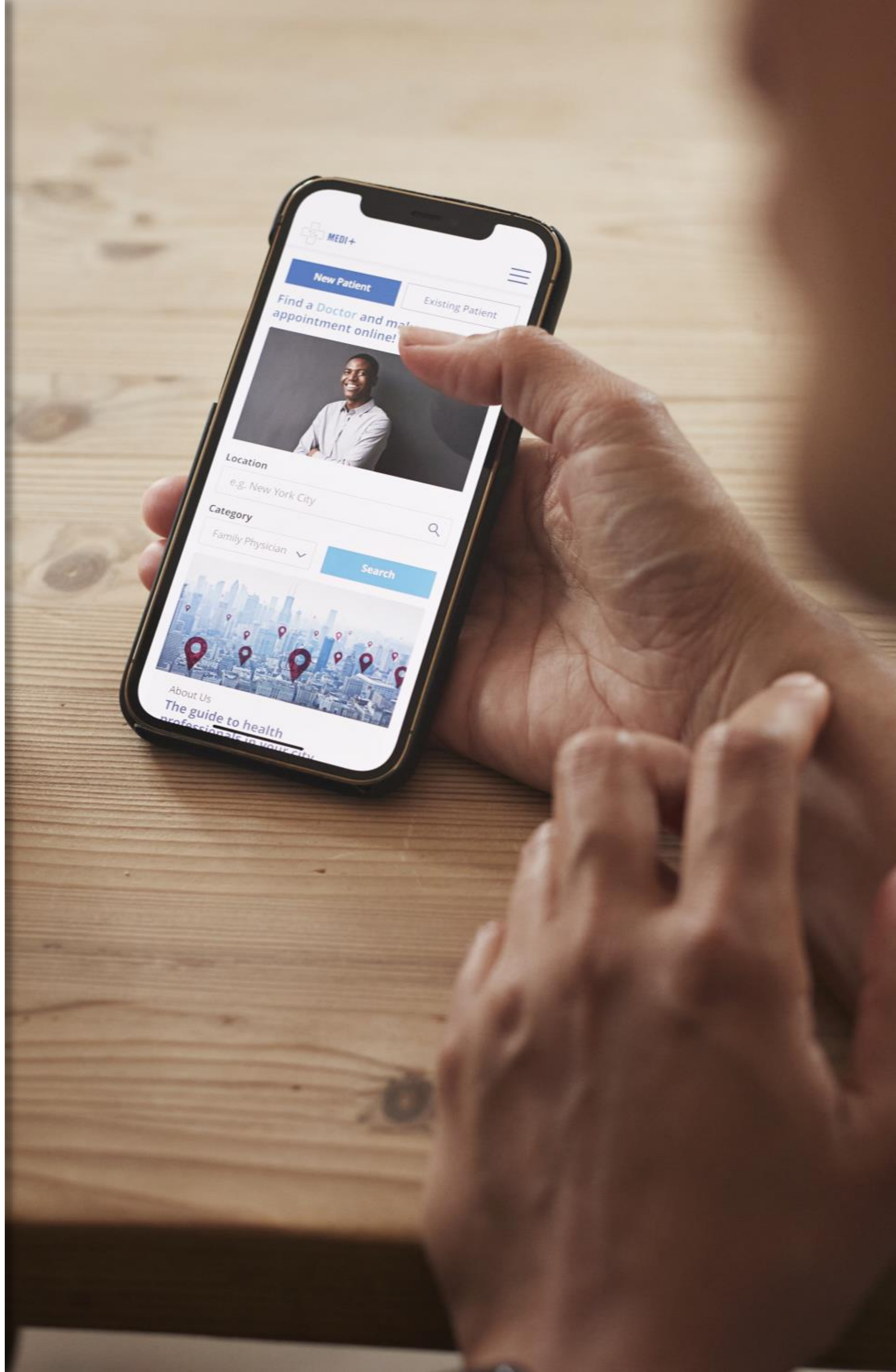
Aside from price, which, if any, of the following are most important to you when deciding which smartphone to buy next? (Multiple choice question)

We are keeping our smartphones for longer

Today's consumers use their smartphones for a longer period before replacing them with new ones. Going back to 2018, the average time that smartphones had been in use was 1.5 years. In 2022, the average has gone up to 2.0 years.

Purchase of current smartphone
When did you buy or receive your current phone?



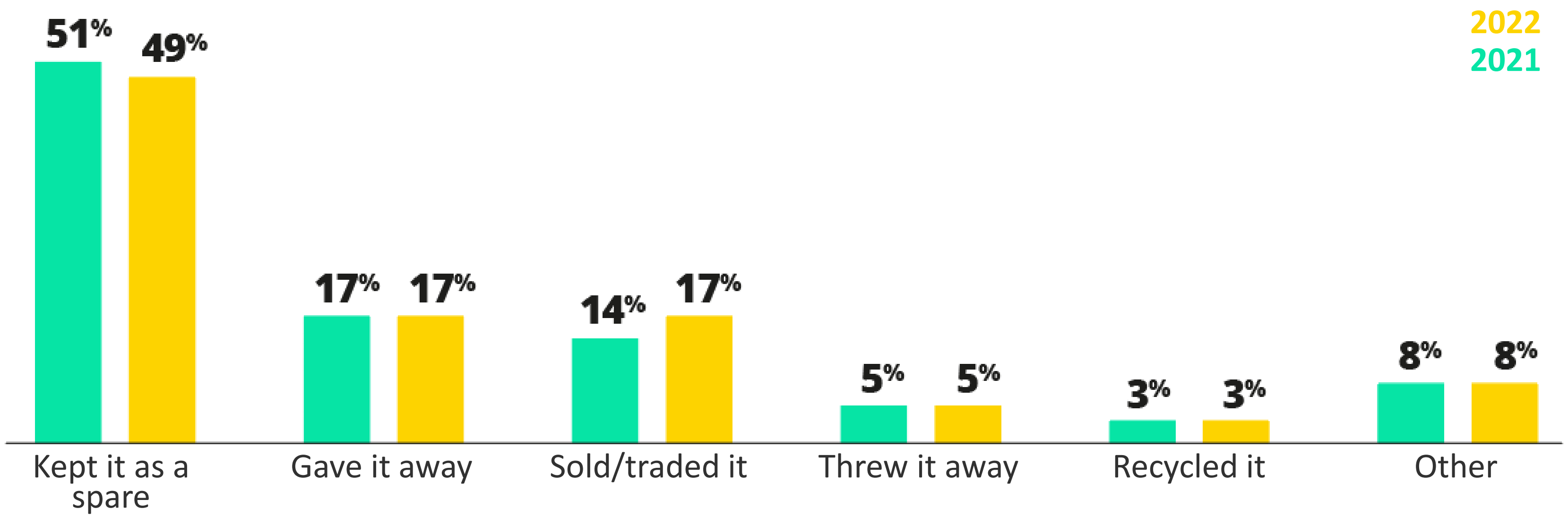


What happens in the afterlife?

49% of respondents have kept their old phone as a spare, while 5% have thrown it out. 17% of respondents said that they had sold or traded their old phone, 17% had given their old phone to a family member or friend, and 3% had used a recycling scheme or service for the reuse of materials.

Afterlife of previous phone

What happened to your previous mobile phone when you bought or received your current phone?



What happens in the afterlife?

Many people want to keep their old phone in case the new phone is lost or broken, and many still use their old phone for storage or access to certain apps. 5% said that they were not sure how to recycle their old phone, 4% were not sure who to sell it to, and 13% said that they simply could not be bothered to get rid of it.

Reason for keeping old smartphone (2022)

Why did you keep your previous mobile phone as a spare?

42%	13%	9%	9%	8%	5%	4%	4%	3%	3%
Wanted it in case my/someone else's phone was lost or broken	Couldn't be bothered to get rid of it	Still using it for another purpose (using certain apps)	Still had files on it I wanted access to	Still had my personal data on it	Wasn't sure how to recycle it or dispose of it safely	Wasn't able to get enough money for it	Wasn't sure who to sell it to	Other reason	Don't know

Chapter 3

No such thing as a typical gamer

Two out of three people in Scandinavia play digital games, typically on their smartphones. Gaming has become an integral part of our lives, and there is no longer such a thing as a typical gamer.

Gaming is more widespread even after the peak of the pandemic

Surprisingly, gaming activity did not decrease after the peak of the COVID-19 pandemic. This year 33% of respondents say that they play games daily, up from 31% in last year's survey.

Daily gaming (2022)

Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day? (Respondents who chose "Play games")

33%

Plays games on a daily basis

Older generations play more than you think

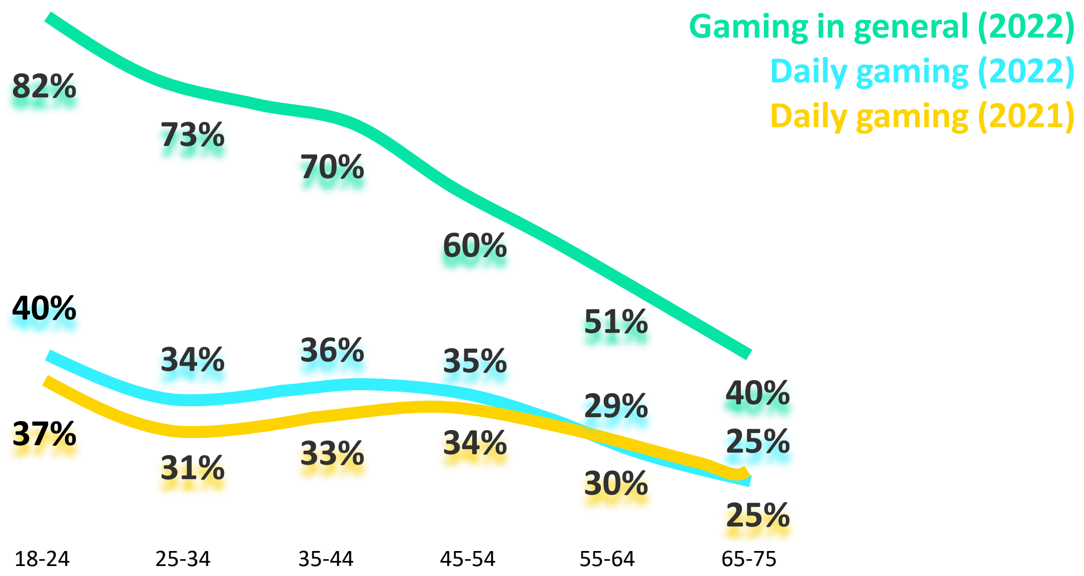
Not only do older generations still play games, they do so relatively frequently. People aged 65-75 are only half as likely as those 18-24 to play games ever (40% compared to 82%), and 25% of 65–75-year-olds are daily gamers compared to 40% of 18-24 year-olds.

Today, more women play games than men, largely smartphone games, and the gap is slightly wider in 2022 than it was in 2021.

These findings are valuable knowledge in a commercial context since many gaming platforms are used for advertising.

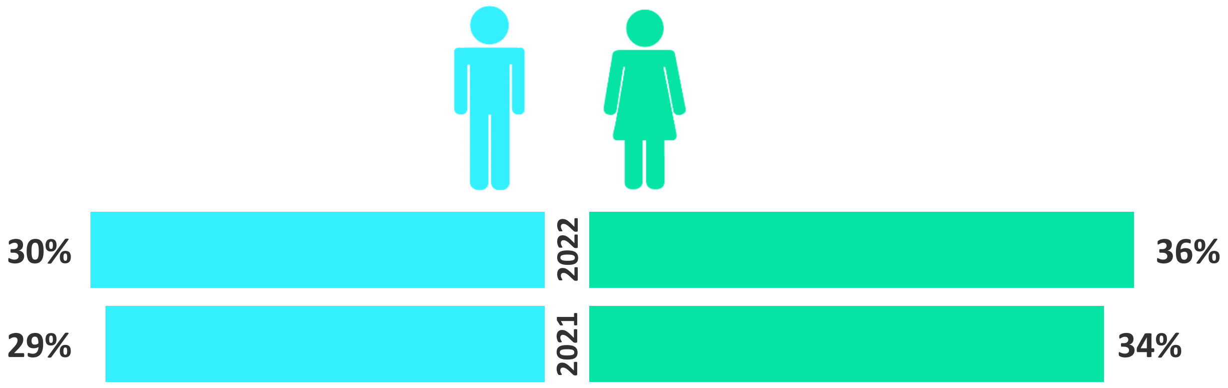
Frequency of gaming: Age

Gaming in general: Which, if any, of the following types of games do you play on any device? (Respondents who chose any game)
Daily gaming: Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day? (Respondents who chose "Play games")



Daily gaming: Gender

Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day? (Respondents who chose "Play games")



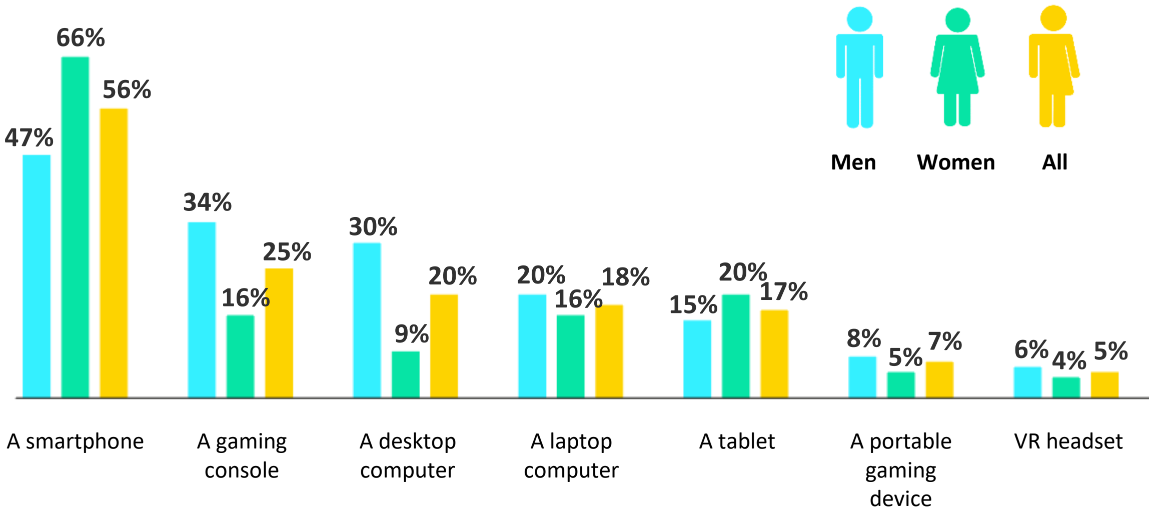
Smartphones are winning, but consoles are still in the game

Not surprisingly, the smartphone is the most-used device for playing video games. They are more than twice as popular as any other device. 56% of respondents use their smartphone for regular gaming. Games consoles come in second, with 25% of respondents using them regularly.

Also, when looking at the preferred device for gaming (as opposed to the device actually used), the smartphone seems unbeatable: 40% of respondents now say that they prefer the smartphone, up from 34% in 2018 and the numbers have risen steadily over the years.

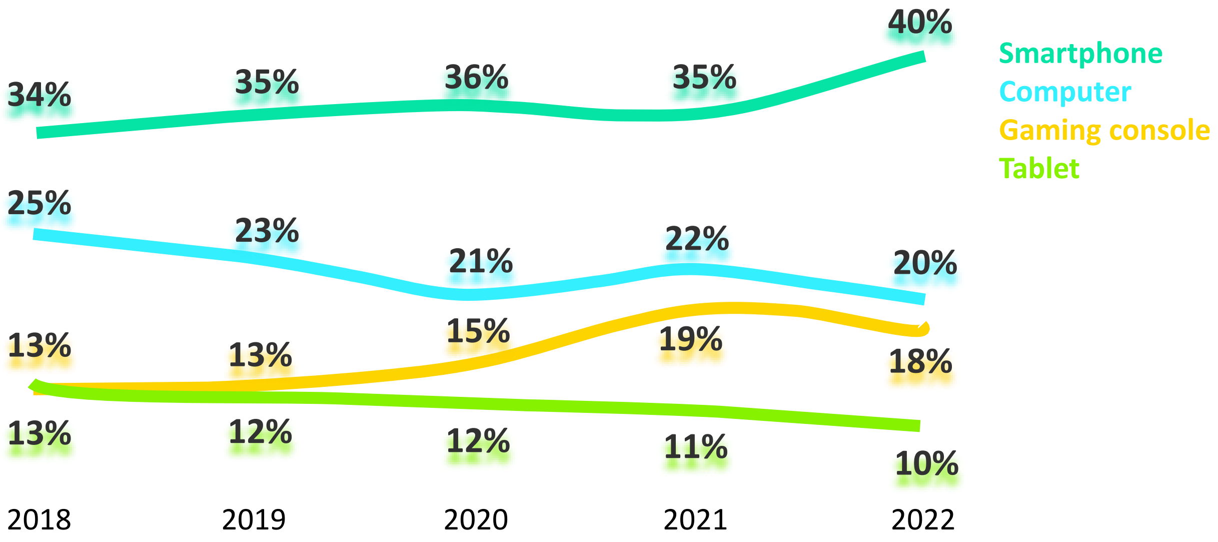
Devices used for gaming (2022)

Which, if any, of the following devices do you play video games on regularly?



Preferred device for gaming: Yearly development

Which, if any, is your preferred device for each of the following activities? (Play games)

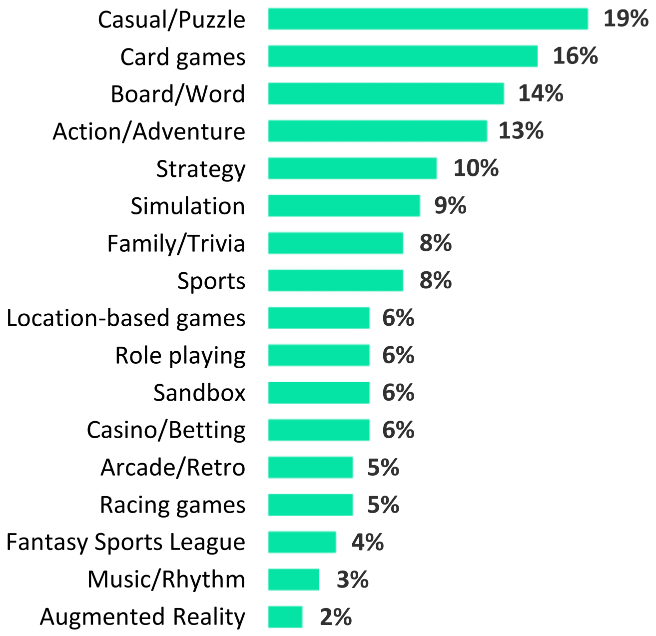


Simple games have the biggest volumes of users

Simple casual games emerge as the clear winners of the gaming popularity contest, while complex games based on strategy are only in fifth place.

Types of games played (2022)

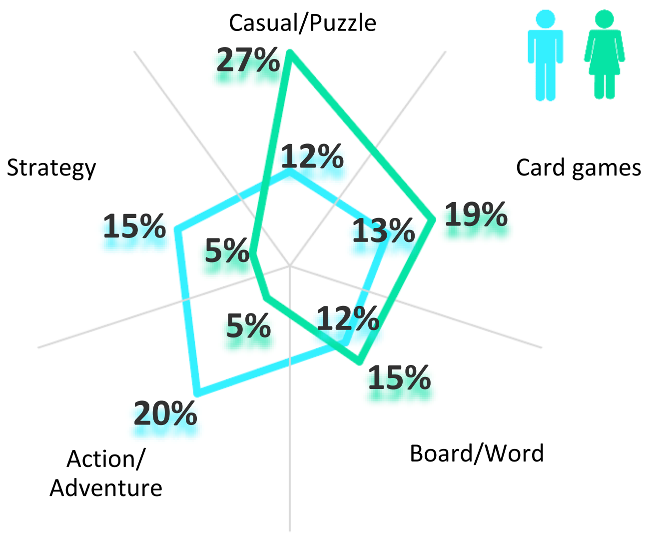
Which, if any, of the following types of games do you play on any device?



Women are more than twice as likely to play casual games, while men are four more likely than women to prefer action or adventure games.

Types of games: Gender (2022)

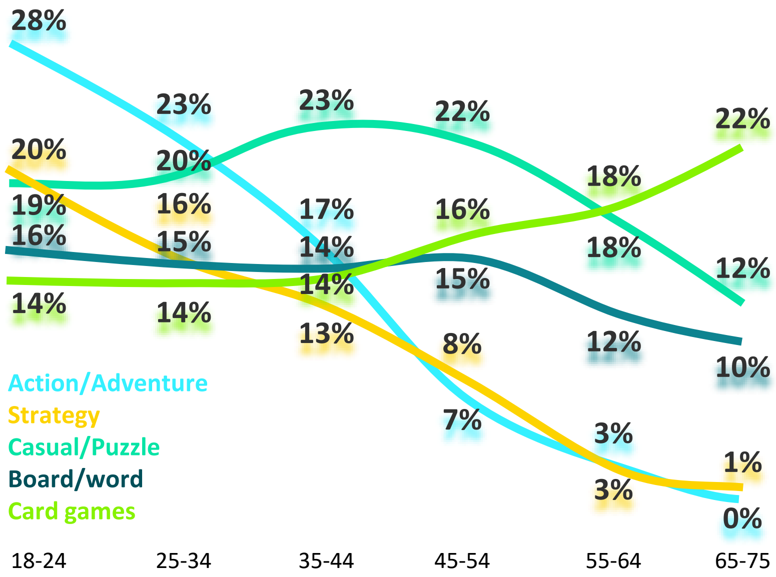
Which, if any, of the following types of games do you play on any device?



Younger age groups prefer action and strategy games, middle-aged groups prefer casual and word games, and older groups prefer card games.

Types of games: Age (2022)

Which, if any, of the following types of games do you play on any device?



It is fun to play – but are we obsessed?

We asked respondents about the downsides of gaming. The responses were not alarming, but some console gamers (from 6 to 16%) feel that gaming is taking up too much of their time, making them stay up too late, or game at inconvenient times, for example during meals or early in the morning.

Gaming console statements (2022)
Thinking about the following statements, which of the following devices does it apply to, if any?
(Respondents who choose "Gaming console")

16%
Stay awake later than planned

15%
Spend too much time on this device

8%
Use during mealtimes

6%
Use as soon as I wake up

Chapter 4

Scandinavian consumers care about privacy. Well, sort of...

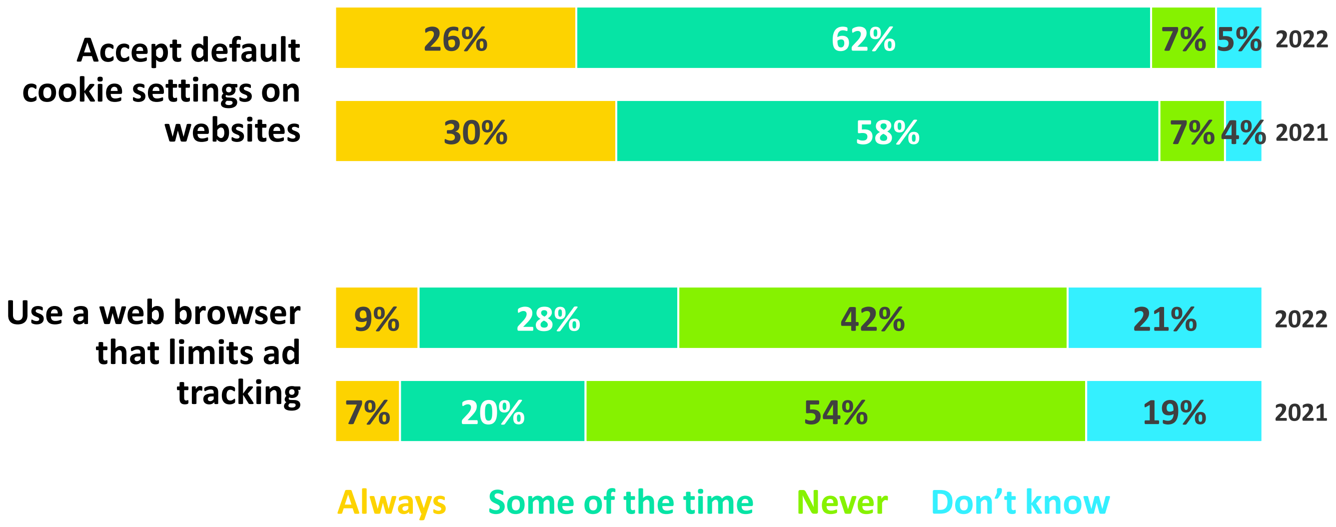
The digital universe is considered either secure or simply secure enough so that there is no need to worry about privacy. Scandinavian consumers have yet to see a major security breach that could expose the real vulnerability of data.

Privacy behaviour remains unchanged

When it comes to basic privacy, Scandinavians can best be described as unconcerned. Most people accept default cookie settings some of the time, and a quarter of Scandinavians (26%) always accept cookie settings; but what is perhaps most telling is that only 7% never accept cookies, and only 9% always use a web browser that limits ad tracking.

Online behaviour (2022)

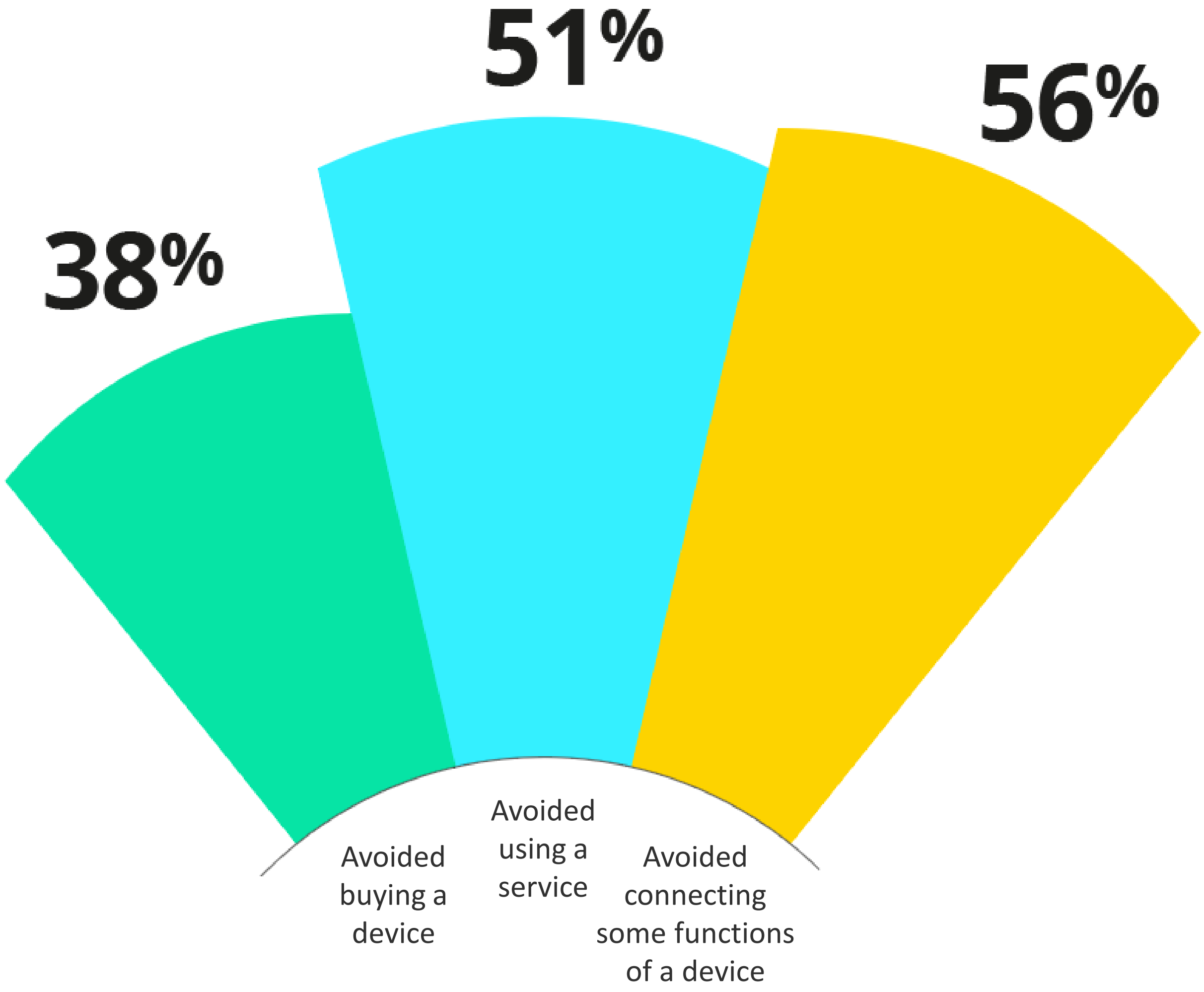
How often do you accept all default cookie settings when prompted by a website?
How often do you use a specific web browser or search engine that limits ad tracking by default?



The occasional concern is still there

Despite the lack of general concern for data privacy, many Scandinavian consumers have shown occasional concerns about privacy: 38% of respondents have avoided buying a device, 51% have avoided using a service, and 56% have avoided connecting certain functions of a device.

Actions prompted by privacy concerns (2022)
Which, if any, of the following have you ever done because of privacy concerns? (Multiple choice question)



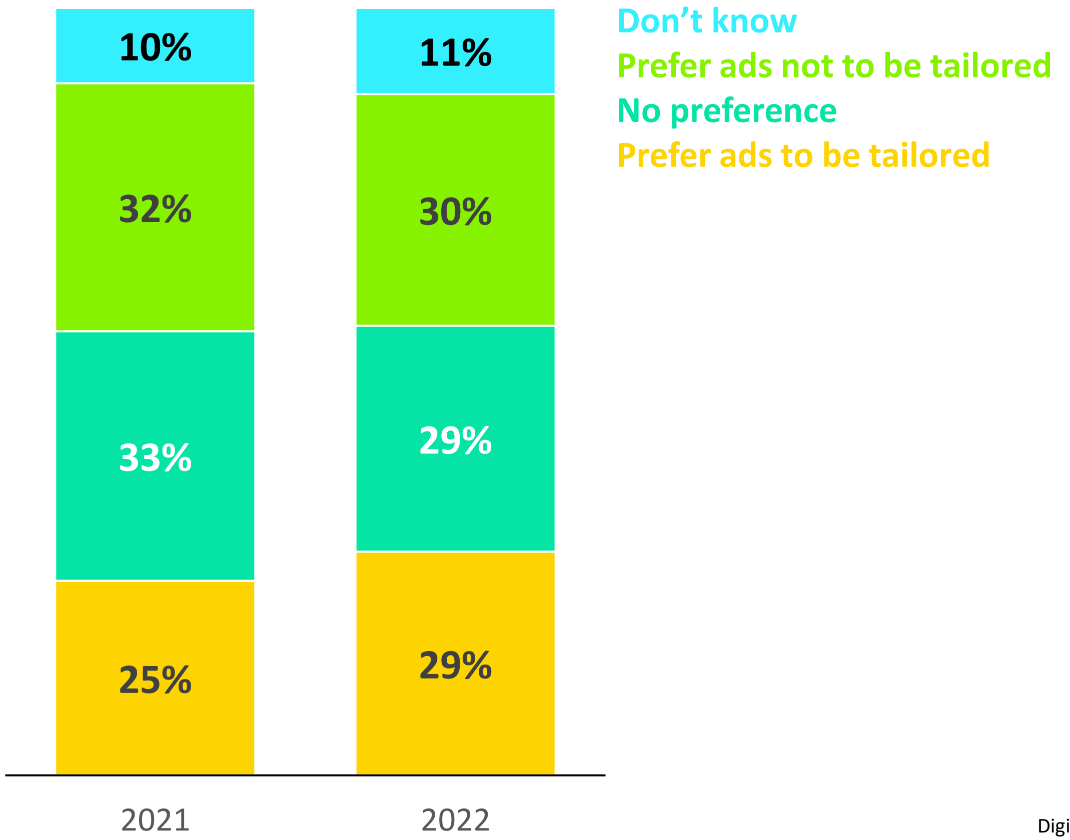
Tailored ads do not raise concerns

In the debate about privacy, tailored ads are a common topic of debate, since advertisers are some of the heaviest users of data for targeting specific groups of consumers or even individual consumers at a personal level.

Preferences vary among Scandinavian consumers: 29% prefer ads to be tailored, 30% prefer ads not to be tailored, and 29% are indifferent.

Preference for tailored ads

Thinking about the ads you see when using the internet and social media. To what extent do you prefer these to be tailored to you based on your interests or online search?



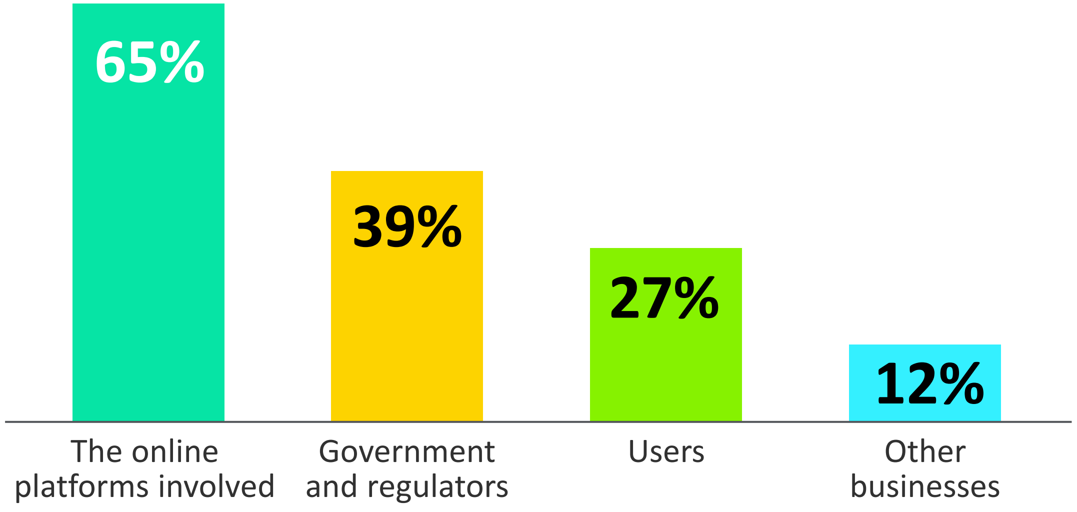
No strong sense of responsibility for data privacy

Online users in Scandinavia do not feel a particularly strong sense of responsibility for keeping their data private. 65% believe that the online platforms involved are responsible for data privacy, while only 27% think that users have any responsibility themselves.

Interestingly, 39% think that the government and regulators are responsible for keeping user data private.

Responsibility for keeping user data private (2022)

Which, if any, of the following do you think should be responsible for addressing the following online threats: Keeping user data private? (Multiple choice question)

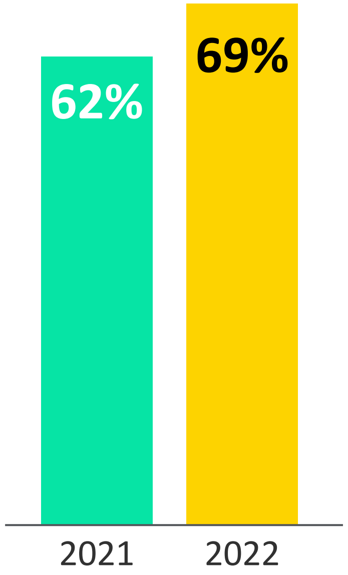


Passionate health fanatics

There has been an increase in health monitoring, with 69% of Scandinavian respondents now saying that they monitor their health one way or another through smartphones, smart watches or fitness bands, up from 62% in last year's survey.

Health data tracking: Yearly development

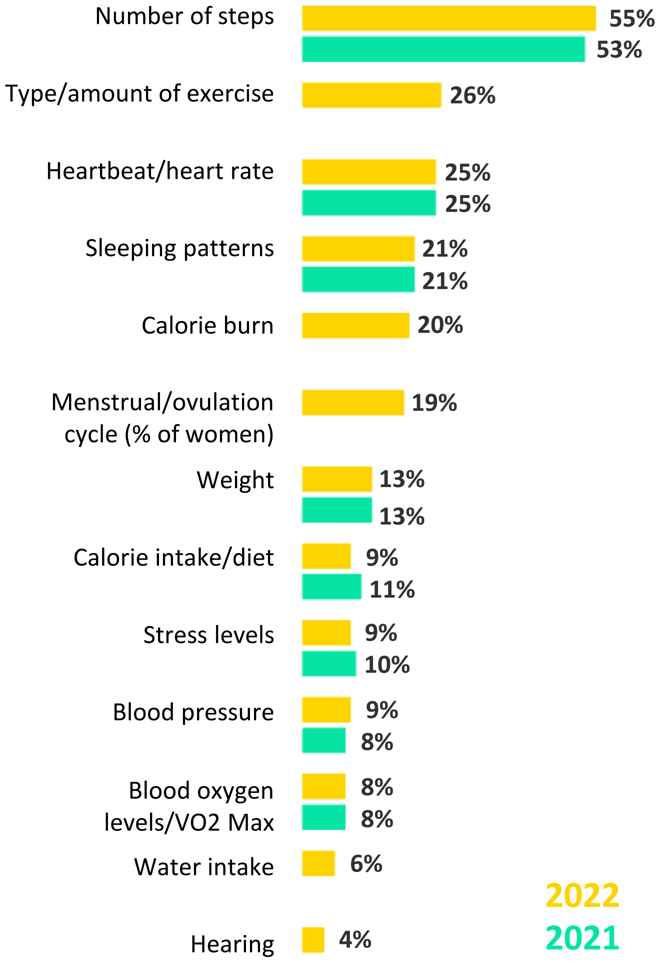
Which, if any, of these do you monitor on your devices such as smartphones, smart watches, fitness bands, etc.? (Respondents who chose at least one way of monitoring health data)



There seems to be a growing awareness of the possibilities of tracking health data, and Scandinavian consumers are being presented with more options for tracking as new technology offers advanced data collection combined with complex analytics and the expertise of healthcare professionals.

Health data tracking: Specific measurements

Which, if any, of these do you monitor on your devices such as smartphones, smart watches, fitness bands, etc.?



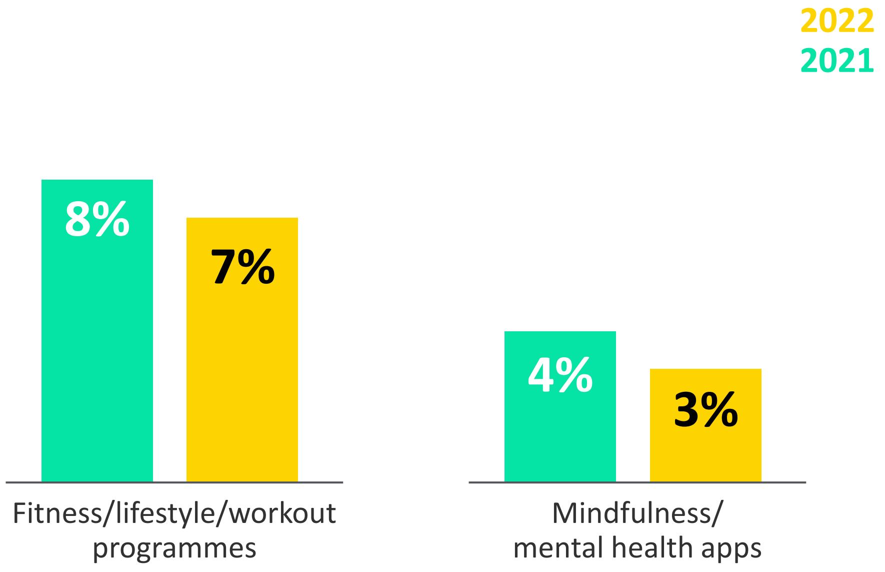
Paid health subscriptions have not caught on with Scandinavian users

Despite the popularity of health tracking, however, Scandinavian consumers are not keen on paying for services: only 7% pay for fitness or lifestyle digital subscriptions, and only 3% pay for apps that deal with mindfulness or mental health.

These responses signal that paid health subscriptions have not caught on with Scandinavian users. Part of the explanation for the unwillingness to pay could be the availability of free alternative options.

Usage of paid health subscriptions: Yearly development

Thinking now about PAID services or subscriptions, which, if any, of the following do you have access to? Please also consider subscriptions paid for by other people that you can access, such as other members of your household or family, or by your job. (Multiple choice question)



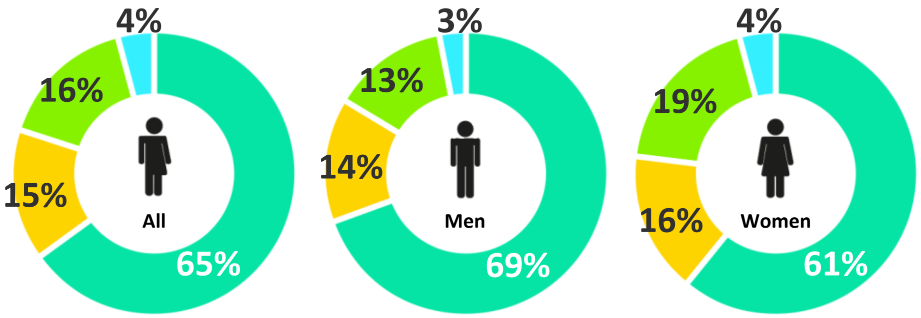
More tend to be more concerned about sharing health data

19% of our female respondents say that they would not be comfortable sharing health data recorded on devices with their doctors, and another 20% are unsure or undecided.

The most common reason for being uncomfortable about sharing health data is concern about accuracy. In addition, 34% fear that their data could be used without their consent, and 22% worry that data may be shared with third parties. Women tend to be more worried than men about a doctor knowing and using their data in their treatment.

Sharing health data with doctor (2022)

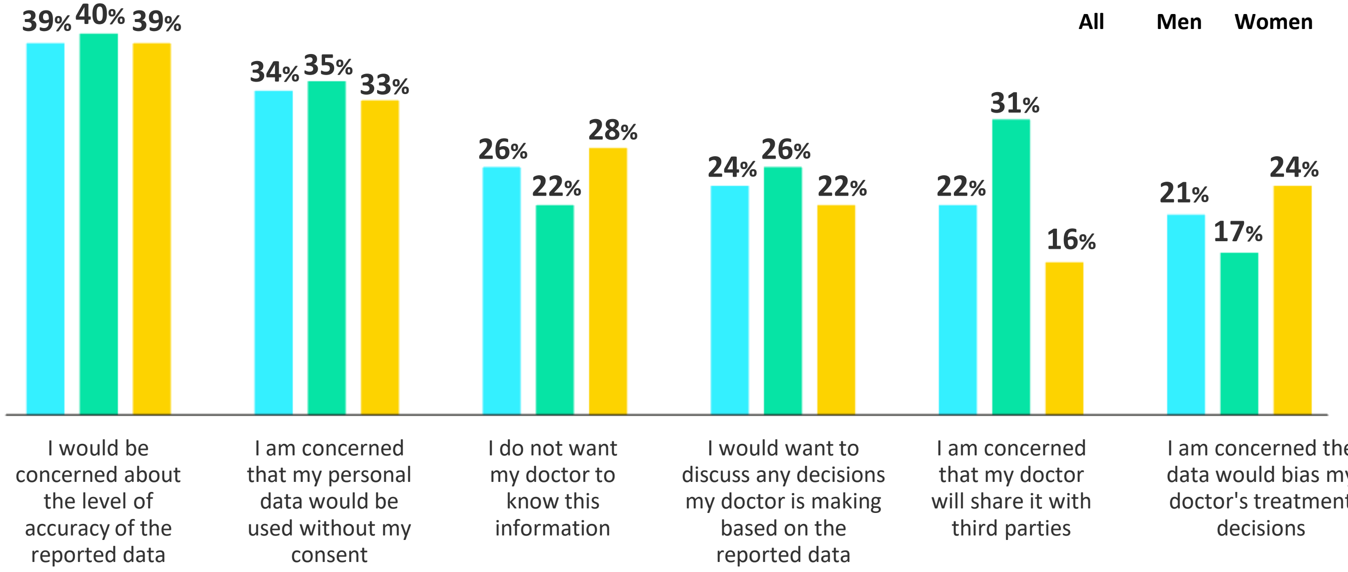
To what extent do you agree or disagree with the following statement? I would be comfortable giving my doctor access to the health data which is recorded on my devices.



Agree
Neither agree nor disagree
Disagree
Don’t know

Reasons for not sharing health data with doctor (2022)

You said that you would not be comfortable giving your doctor access to the health data which is recorded on your devices. Why is that? (Multiple choice question)



Chapter 5

Smartphone usage is still rising in Scandinavia

Just when you thought devices could not take up more of people’s lives, usage in the Nordics continues to rise. 58% of Scandinavians now admit that they spend too much time on their smartphone.

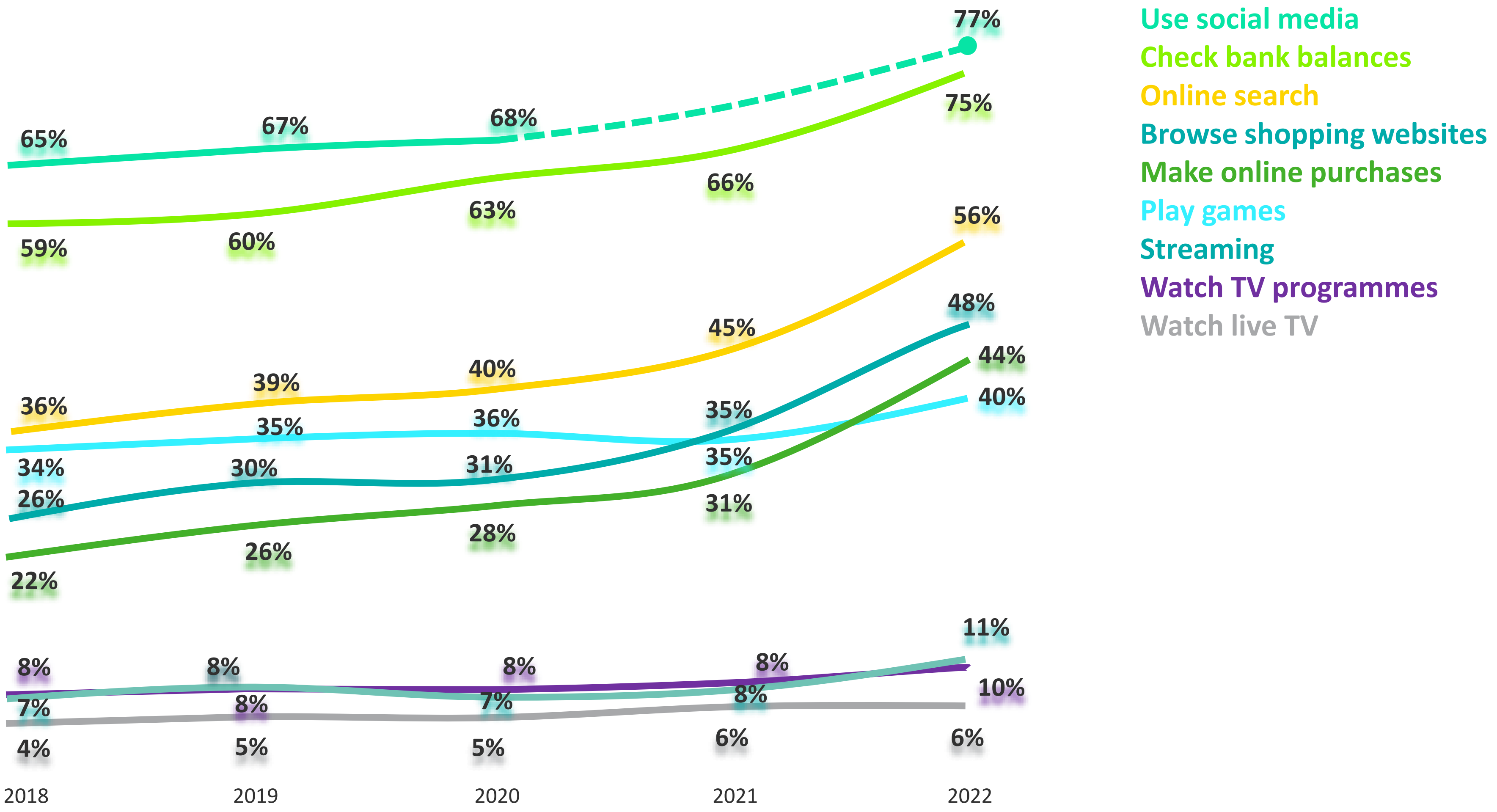
Smartphones are gaining in popularity

The smartphone market in Scandinavia is now mature: 94% of Scandinavians own or have access to a smartphone, a figure that has remained relatively constant over the past few years.

The preference for smartphones is on the rise in almost all areas – from using social media to checking bank accounts, from searching and shopping to streaming films and watching TV on demand.

Smartphones as preferred device for activities

Which, if any, is your preferred device for each of the following activities? (Respondents who chose "Mobile phone"). Note: The line for social media is dotted as the 2021 percentage is not available.

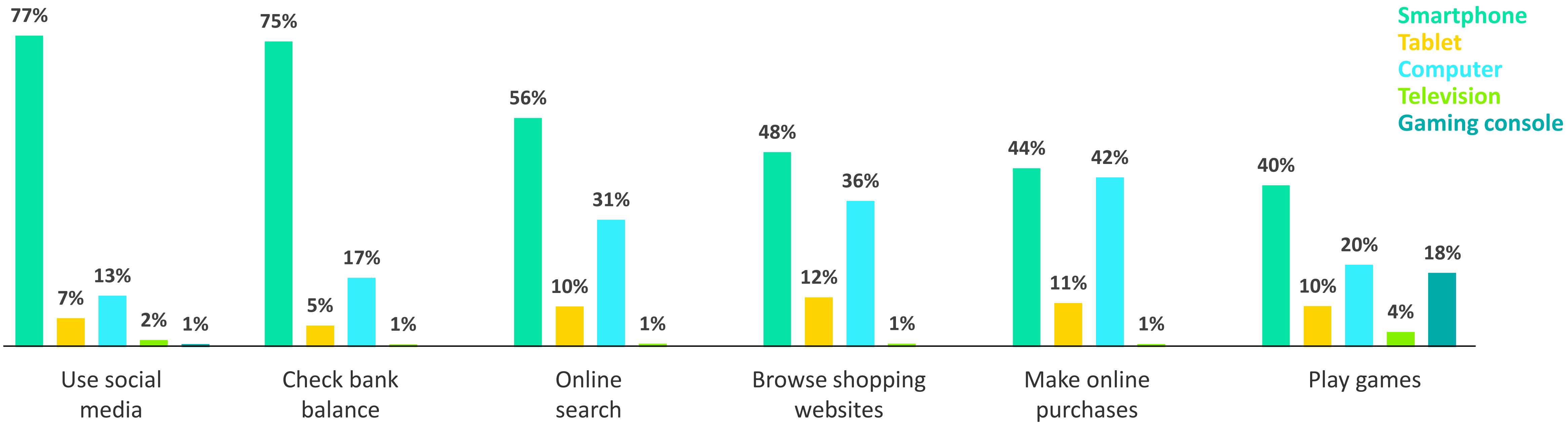


Computers and TV screens are still relevant

31% prefer a computer (laptop or desktop) for online searches, 42% prefer computers for online purchases (almost as many as the 44% who prefer smartphones), and 20% prefer computers for playing games.

Preferred device for online activities (2022)

Which, if any, is your preferred device for each of the following activities? The answer category "None of these" is not shown in the graph. The percentages for each activity therefore does not add up to 100%.

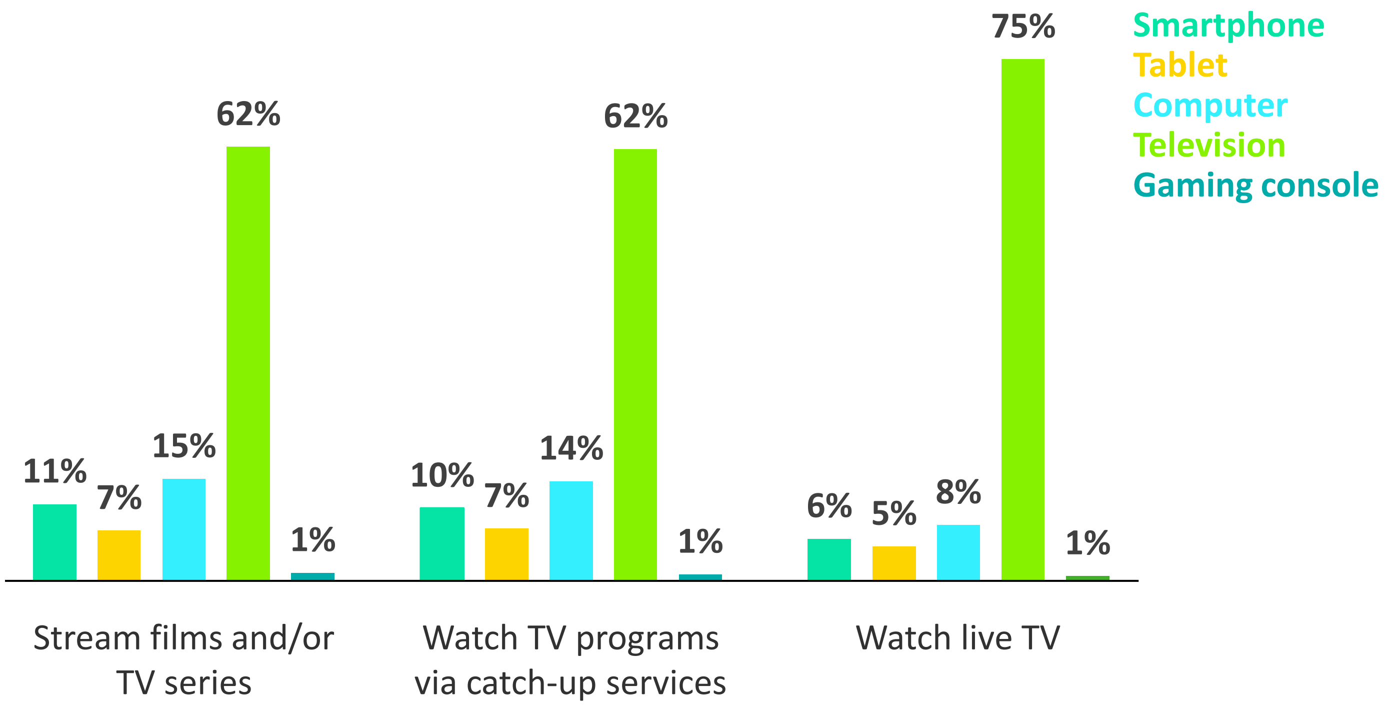


Computers and TV screens are still relevant

Computers and TVs remain popular for entertainment. 62% of respondents prefer the larger TV screen for streaming films and TV shows.

Preferred device for TV and streaming (2022)

Which, if any, is your preferred device for each of the following activities? Note: The answer category "None of these" is not shown in the graph. The percentages for each activity therefore does not add up to 100%.

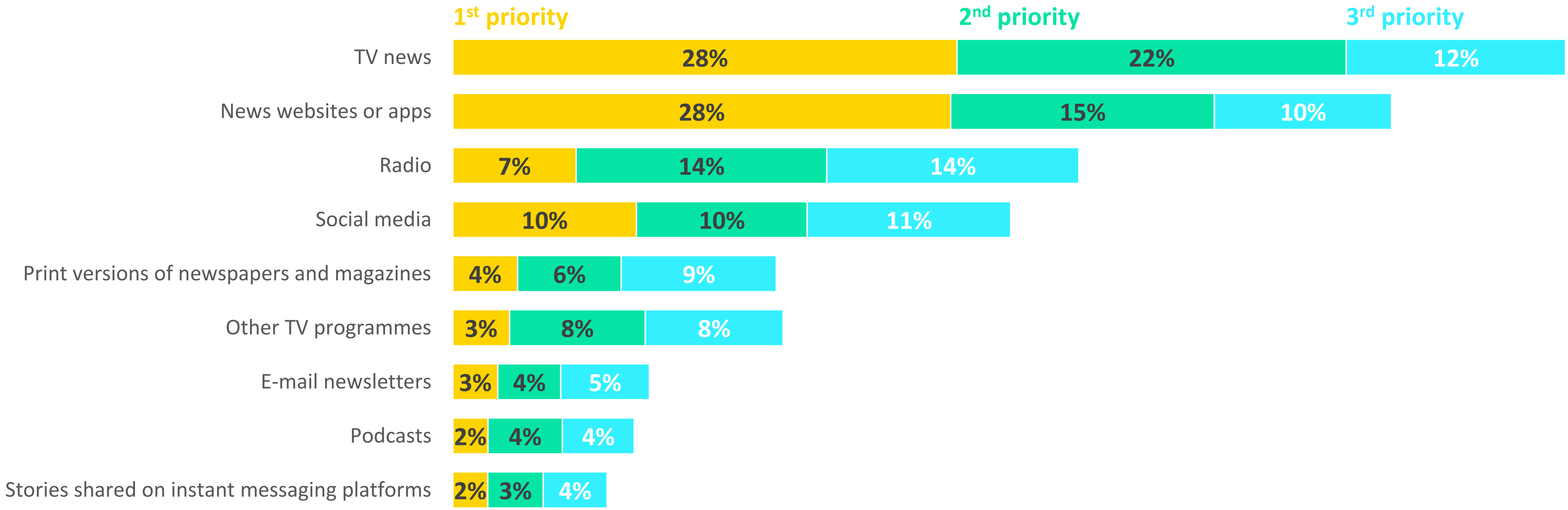


Preferred way to stay updated on news

Many people also still stay updated on news through TV. 28% said that TV news is their favourite way to stay updated on current events.

Preferred ways to stay updated on news and current events (2022)

Please rank the top 3 ways in which you stay updated on news or current events.



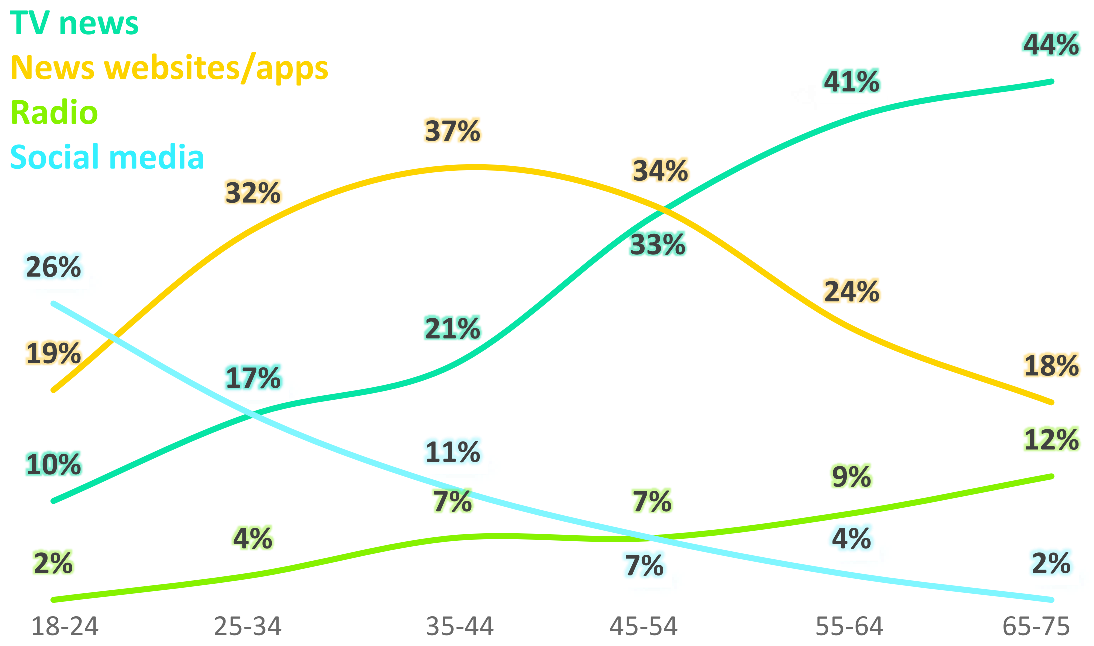
Preferred way to stay updated on news

However, there are differences in preferences for news sources between age groups. In general TV and radio news are more popular with older people, and the use of social media to obtain news declines with age.

Looking at specific social media platforms, we see that Facebook is the preferred outlet for staying updated on news and current events.

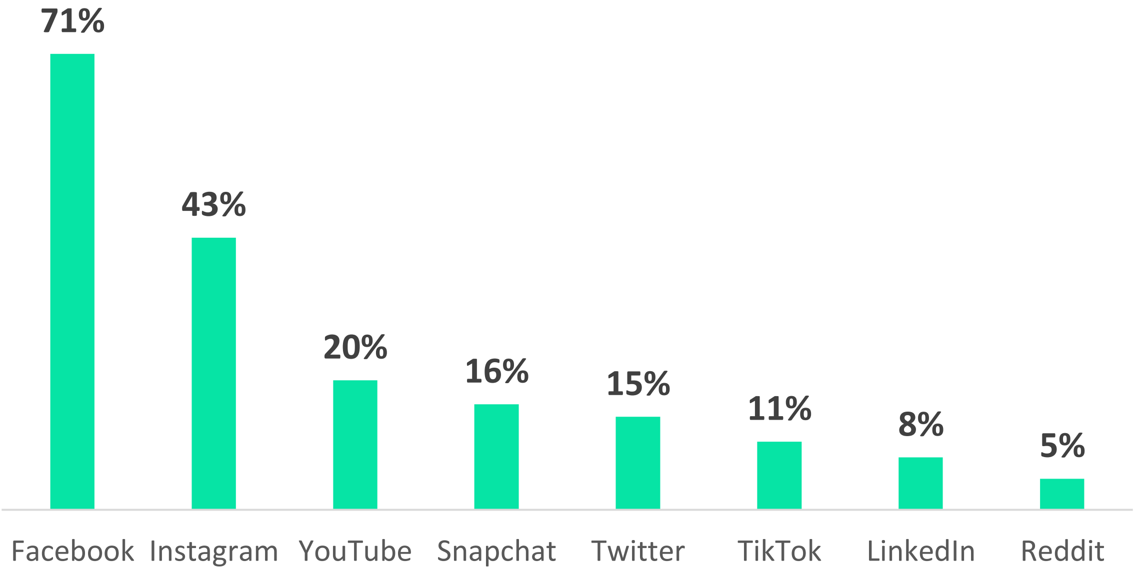
Most preferred way to stay updated on news and current events: Age (2022)

Please rank the top 3 ways in which you stay updated on news or current events (Respondents who ranked the channels below as their first priority)



Preferred social media platform for staying updated on news or current events (2022)

Which social media platforms are your most preferred to stay updated on news or current events? (Multiple choice question)



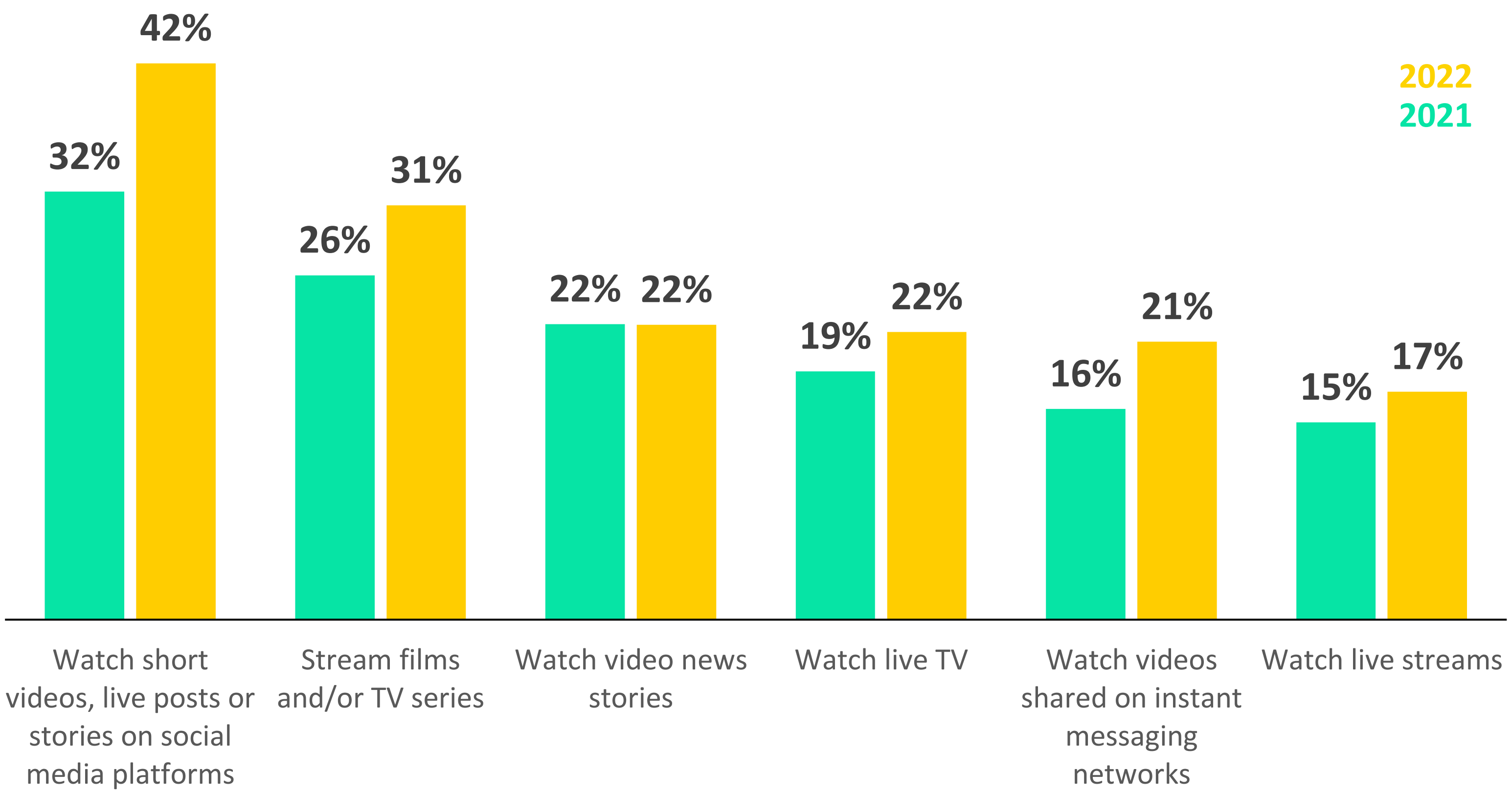
Short video content and ‘stories’ have mushroomed in 2022

With the popularity of both TikTok videos and Reels, it is perhaps no surprise that Scandinavian consumers now are much more likely to watch video content on their social media platforms.

42% say that they watch short videos, live posts or stories at least once a day, up by almost a third from 32% last year.

Daily activities

Below is a list of activities that you may do on your devices. Which, if any, of these do you do at least once a day? (Multiple choice question)



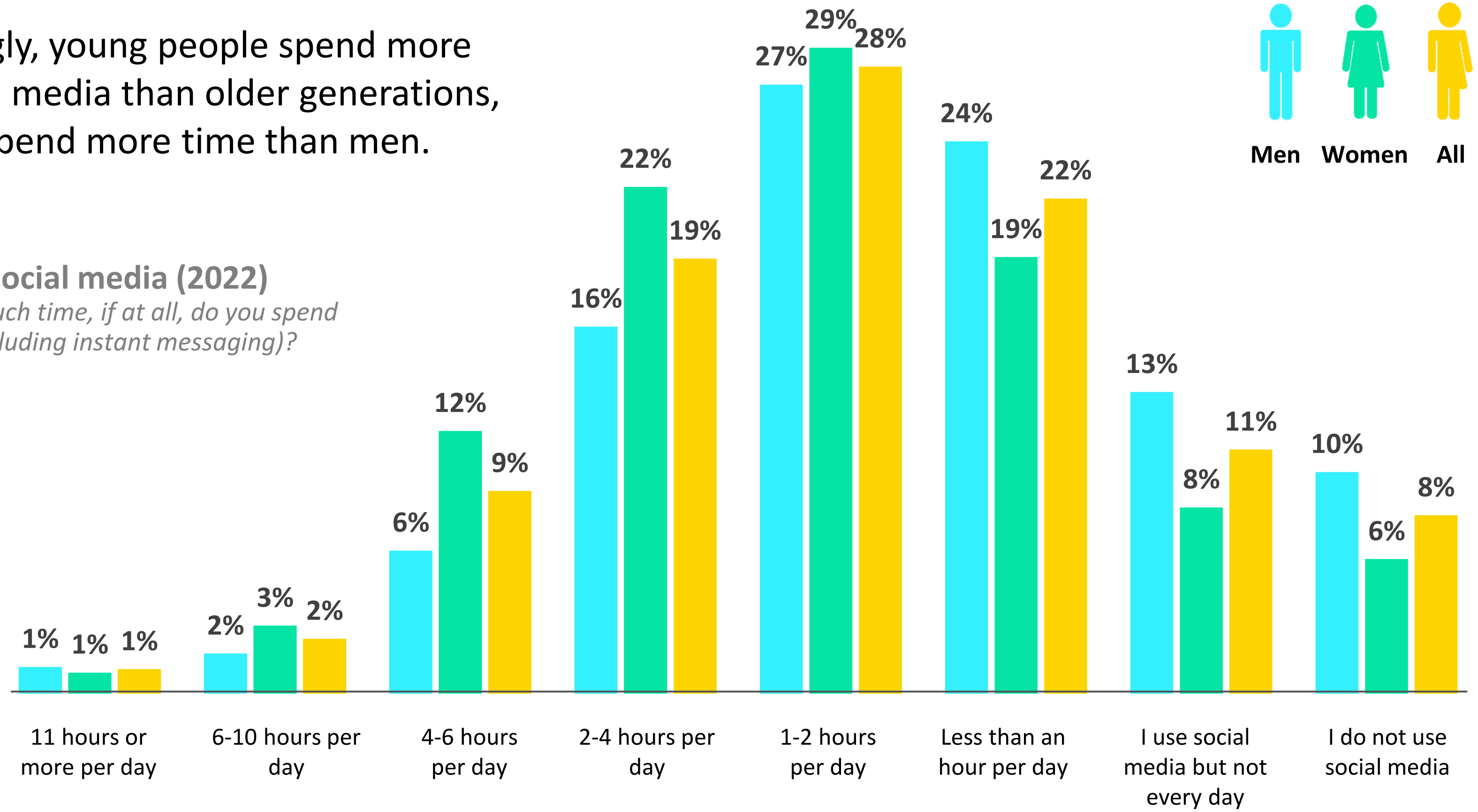
Social media steals your time

Almost one in three people now spend more than two hours daily on social media, and 12% consume or create social media content for more than four hours every day.

Not surprisingly, young people spend more time on social media than older generations, and women spend more time than men.

Time spent on social media (2022)

On average, how much time, if at all, do you spend on social media (excluding instant messaging)?



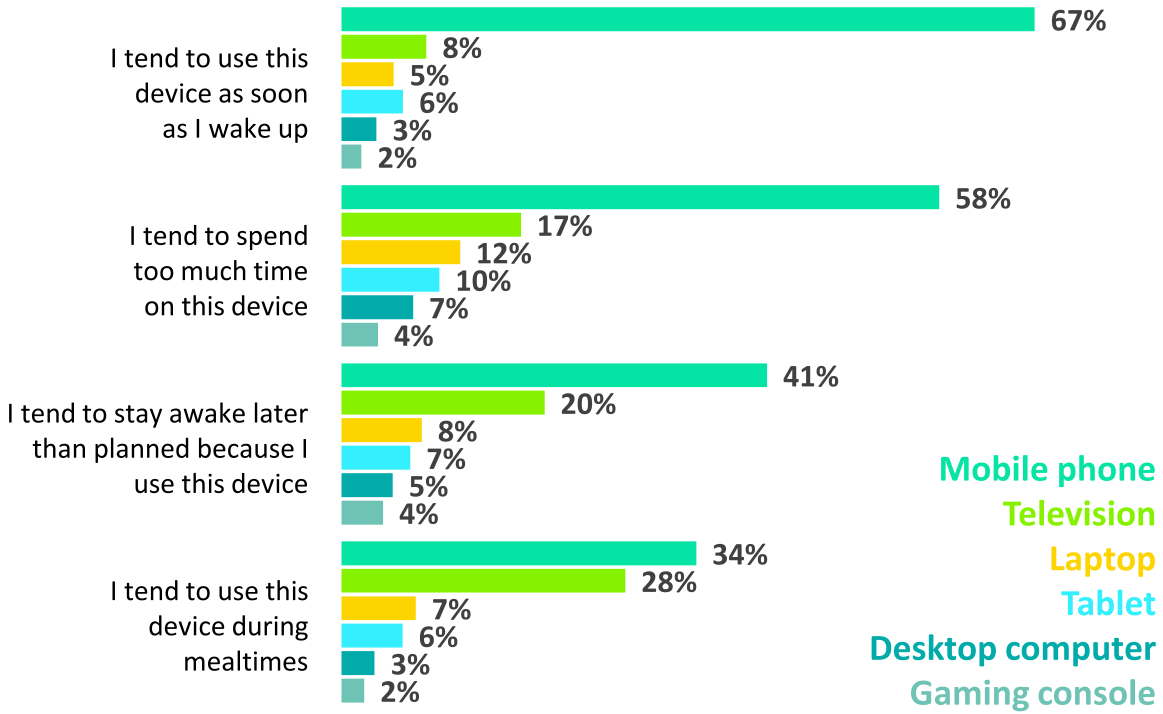
Overuse of devices can affect your day – and your life

A large proportion of respondents believe they spend too much time on their devices, the smartphone in particular. 41% stay awake later than planned because of it, and 67% use it as soon as they wake up in the morning.

Evenings especially are spent on devices in many Scandinavian homes, and 37% say that they use their phone too much in the evening, up by ten percentage points from 2021. As many as 21% say that they use their phone too much all the time.

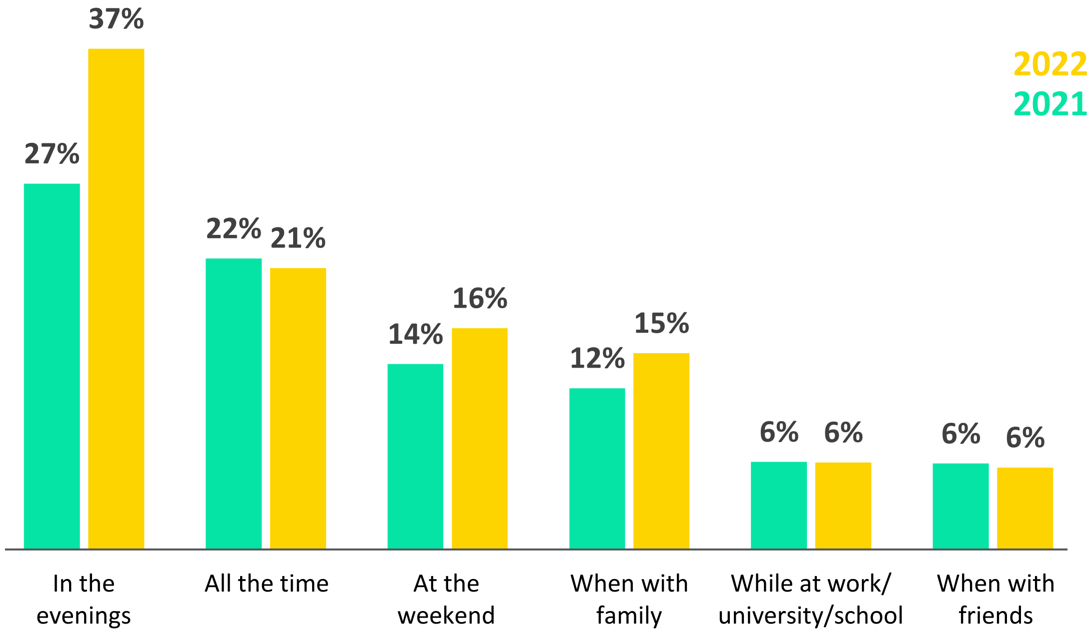
Overuse of devices (2022)

Thinking about the following statements, which of the following devices does it apply to, if any? (Multiple choice question)



Phone overuse

In which, if any, of the following situations do you think you use your mobile phone too much? (Multiple choice question)



Bases

Chapter 1:

Slide 3: Base: All adults 18-75. Base size: 2021 (n=2001) 2022 (n=2003).

Slide 4: Base: All adults 18-75. Base size: 18-24, 2021 (n=2,049) 2022 (n=2,039) 25-34, 2021 (n=3,072) 2022 (n=3,056) 35-44, 2021 (n=353) 2022 (n=356) 45-54, 2021 (n=378) 2022 (n=390) 55-64, 2021 (n=314) 2022 (n=336) 65-75, 2021 (n=335) 2022 (n=326).

Slide 5: Base: All adults 18-75. Base size: 2021 (n=4,000) 2022 (n=4,000).

Slide 6: Base: All adults 18-75 who has access to at least one streaming service. Base size: 2021 (n=1,555) 2022 (n=1,648). Note: We only have numbers available for Denmark and Norway. Therefore, Sweden is not included in the figure.

Slide 7: Base: All adults 18-75. Base size: Norway, 2022 (n=1,000) Sweden, 2022 (n=1,908) Denmark, 2022 (n=1,092).

Slide 8: Base: All adults 18-75. Base size: 2018 (n=2,074) 2019 (n=2,071) 2020 (n=2,071) 2021 (n=2,092) 2022 (n=2,092). Note: We only have numbers available for Denmark and Norway. Therefore, Sweden is not included in the graph.

Slide 9: Base: All adults 18-75. Base size: 18-24, 2022 (n=487) 25-34, 2022 (n=752) 35-44, 2022 (n=709) 45-54, 2022 (n=758) 55-64, 2022 (n=651) 65-75, 2022 (n=644).

Slide 10: Base: All adults 18-75 who have access to the video streaming subscription service. Base size: Apple TV+ (NO+DK), 2021 (n=152) 2022 (n=141) Prime Video (NO, DK, SE), 2021 (n=217) 2022 (n=329) VGTV (NO), 2021 (n=69) 2022 (n=74) Discovery+ (NO+DK), 2021 (n=244) 2022 (n=268) Viaplay (NO+DK), 2021 (n=491) 2022 (n=617) HBO Max (NO+DK), 2021 (n=449) 2022 (n=665) Disney+ (NO+DK), 2021 (n=412) 2022 (n=532) Netflix (NO, DK, SE), 2021 (n=1,858) 2022 (n=1,994) YouTube Premium (NO+DK), 2021 (n=99) 2022 (n=100) TV2 Play (DK), 2021 (n=324) 2022 (n=399) (n=324) TV2 Play (NO), 2021 (n=174) 2022 (n=290).

Slide 11: Base: All adults 18-75 who have cancelled a video streaming subscription service in the past 12 months. Base size: 2021 (n=1,028) 2022 (n=1,273).

Slide 12: Base: All adults 18-75. Base size: 2022 (n=1,997).

Slide 13: Base: All adults 18-75 that didn't answer "I would not subscribe at all". Base size: 2021 (n=3,219) 2022 (n=3,366).

Slide 14: Left (Base: All adults 18-75 with access to a video service or another paid service or subscription. Base size: 2022 (n=3394)) Right (Base: All adults 18-75 with access to a video service or another paid service or subscription. Base size: 18-24, 2022 (n=445) 25-34, 2022 (n=706) 35-44, 2022 (n=622) 45-54, 2022 (n=659) 55-64, 2022 (n=517) 65-75, 2022 (n=444)).

Chapter 2:

Slide 16: Base: All adults 18-75 who have a smartphone and remember if it was new or used when getting it. Base size: Japan, 2022 (n=1,745) Italy, 2022 (n=1,859) Belgium, 2022 (n=1,823) The Netherlands, 2022 (n=1,898) Scandinavia, 2022 (n=3,766) Austria, 2022 (n=930) Canada, 2022 (n=1,729) Germany, 2022 (n=1,827) UK, 2022 (n=3,644) Argentina, 2022 (n=1,733).

Slide 17: Base: All adults 18-75 who have access to a smartphone and remember when getting it and remember if it was new or used when getting it. Base size: 2022 (n=1,844).

Slide 18: Base: All adults 18-75 who bought/received a new phone. Base size: 2022 (n=3,412).

Slide 19: Base: All adults 18-75 who have a phone or smartphone. Base size: 2021 (n=3,839) 2022 (n=3,887).

Slide 20: Base: All adults 18-75 who have a smartphone and remember when getting it. Base size: 2018 (n=4,702) 2022 (n=1,901).

Slide 21: Base: All adults 18-75 who have a phone or smartphone. Base size: 2021 (n=3,839) 2022 (n=3,887).

Slide 22: Base: All adults 18-75 who kept their previous mobile phone as a spare. Base size: 2022 (n=1,735).

Bases

Chapter 3:

Slide 24: Base: All adults 18-75. Base size: 2022 (n=2003).

Slide 25: Left (Base: All adults 18-75. Base size (Daily gaming): 18-24, 2021 (n=249) 2022 (n=239) 25-34, 2021 (n=372) 2022 (n=356) 35-44, 2021 (n=353) 2022 (n=356) 45-54, 2021 (n=378) 2022 (n=390) 55-64, 2021 (n=314) 2022 (n=336) 65-75, 2021 (n=335) 2022 (n=326). Base size (Gaming in general): 18-24, 2022 (n=487) 25-34, 2022 (n=752) 35-44, 2022 (n=709) 45-54, 2022 (n=758) 55-64, 2022 (n=651) 65-75, 2022 (n=644)) Right (Base: All adults 18-75. Base size: Men, 2021 (n=2,013) 2022 (n=1,012) Women, 2021 (n=981) 2022 (n=990).

Slide 26: Left (Base: All adults 18-75 who play games on any device. Base size: Men, 2022 (n=1,369) Women, 2022 (n=1,245) All, 2022 (n=2,626)) Right (Base: All adults 18-75 who have a smartphone and who play games. Base size: 2018 (n=2,853) 2019 (n=2,941) 2020 (n=1,453) 2021 (n=1,463) 2022 (n=1,460)).

Slide 27: Left (Base: All adults 18-75. Base size: 2022 (n=4,000)) Middle (Base: All adults 18-75. Base size: Men, 2022 (n=2,017) Women, 2022 (n=1,966)) Right (Base: All adults 18-75. Base size: 18-24, 2022 (n=487) 25-34, 2022 (n=752) 35-44, 2022 (n=709) 45-54, 2022 (n=758) 55-64, 2022 (n=651) 65-75, 2022 (n=644).)

Slide 28: Base: Adults 18-75 who plays video games on gaming consoles regularly. Base size: 2022 (n=663).

Chapter 4:

Slide 30: Base: All adults 18-75 who have a phone or smartphone. Base size: 2021 (n=3,839) 2022 (n=1,955).

Slide 31: Base: All adults 18-75. Base size: 2022 (n=1,997).

Slide 32: Base: All adults 18-75 who have a phone or smartphone. Base size: 2021 (n=3,839) 2022 (n=1,955).

Slide 33: Base: All adults 18-75. Base size: 2022 (n=1,997).

Slide 34: Left (Base: All adults 18-75 who have access to a smartphone, smart watch or fitness band. Base size: 2021 (n=3,775) 2022 (n=3,826)) Right (Base: All adults 18-75 who have access to a smartphone, smart watch or fitness band. Base size: 2021 (n=3,775) 2022 (n=3,826))

Slide 35: Base: All adults 18-75. Base size: 2021 (n=4,000) 2022 (n=4,000).

Slide 36: Left (Base: All adults 18-75 who monitor at least one health metric on a device. Base size: All, 2022 (n=2,623) Men, 2022 (n=1,263) Women, 2022 (n=1,350)) Right (Base: All adults 18-75 who monitor at least one health metric on a device and would not be comfortable giving access to doctor. Base size: All, 2022 (n=428) Men, 2022 (n=168) Women, 2022 (n=257)).

Chapter 5:

Slide 38: Base: All adults 18-75 who have access to a smartphone and haven't responded "Not applicable" to the given activity. Base size: Use social media, 2018 (n=3,287) 2019 (n=3,350) 2020 (n=1,675) 2022 (n=1,753) Online search, 2018 (n=3,591) 2019 (n=3,594) 2020 (n=1,791) 2021 (n=1,849) 2022 (n=1,873) Make online purchases, 2018 (n=3,550) 2019 (n=3,541) 2020 (n=1,750) 2021 (n=1,828) 2022 (n=1,842) Stream films and/or TV series, 2018 (n=3,068) 2019 (n=3,154) 2020 (n=1,606) 2021 (n=1,702) 2022 (n=1,716) Watch live TV, 2018 (n=3,121) 2019 (n=3,185) 2020 (n=1,600) 2021 (n=1,663) 2022 (n=1,693) Check bank balances, 2018 (n=3,580) 2019 (n=3,576) 2020 (n=1,785) 2021 (n=1,842) 2022 (n=1,869)
Browse shopping websites, 2018 (n=3,523) 2019 (n=3,512) 2020 (n=1,730) 2021 (n=1,808) 2022 (n=1,838) Play games 2018 (n=2,853) 2019 (n=2,941) 2020 (n=1,453) 2021 (n=1,463) 2022 (n=1,460) Watch TV programmes via catch-up services 2018 (n=3,224) 2019 (n=3,252) 2020 (n=1,646) 2021 (n=1,712) 2022 (n=1,735).

Slide 39: Base: All adults 18-75 who have a smartphone and haven't responded "Not applicable" to the given activity. Base size: Use social media, 2022 (n=1,753) Check bank balances, 2022 (n=1,869) Online search, 2022 (n=1,873) Browse shopping websites, 2022 (n=1,838) Make online purchases, 2022 (n=1,842) Play games 2022 (n=1,460).

Slide 40: Base: All adults 18-75 who have a smartphone and haven't responded "Not applicable" to the given activity. Base size: Stream films and/or TV series, 2022 (n=1,716) Watch TV programmes via catch-up services, 2022 (n=1,735) Watch live TV, 2022 (n=1,693).

Slide 41: Base: All adults 18-75. Base size: 2022 (n=2,003).

Slide 42: Left (Base: All adults 18-75. Base size: 18-24, 2022 (n=239) 25-34, 2022 (n=356) 35-44, 2022 (n=356) 45-54, 2022 (n=390) 55-64, 2022 (n=336) 65-75, 2022 (n=326)) Right (Base: All adults 18-75 who answered that social media is one of the three most preferred methods to stay updated on news or current events. Base size: 2022 (n=631)).

Slide 43: Base: All adults 18-75. Base size: 2021 (n=2,001) 2022 (n=2,003).

Slide 44: Base: All adults 18-75 who have a smartphone and who did not answer "Don't know". Base size: All, 2022 (n=3,717) Men, 2022 (n=1,867) Women, 2022 (n=1,834).

Slide 45: Left (Base: All adults 18-75. Base size: 2022 (n=4,000)) Right (Base: All adults 18-75. Base size: 2021 (n=4,000) 2022 (n=4,000)).

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