seven.one MEDIA

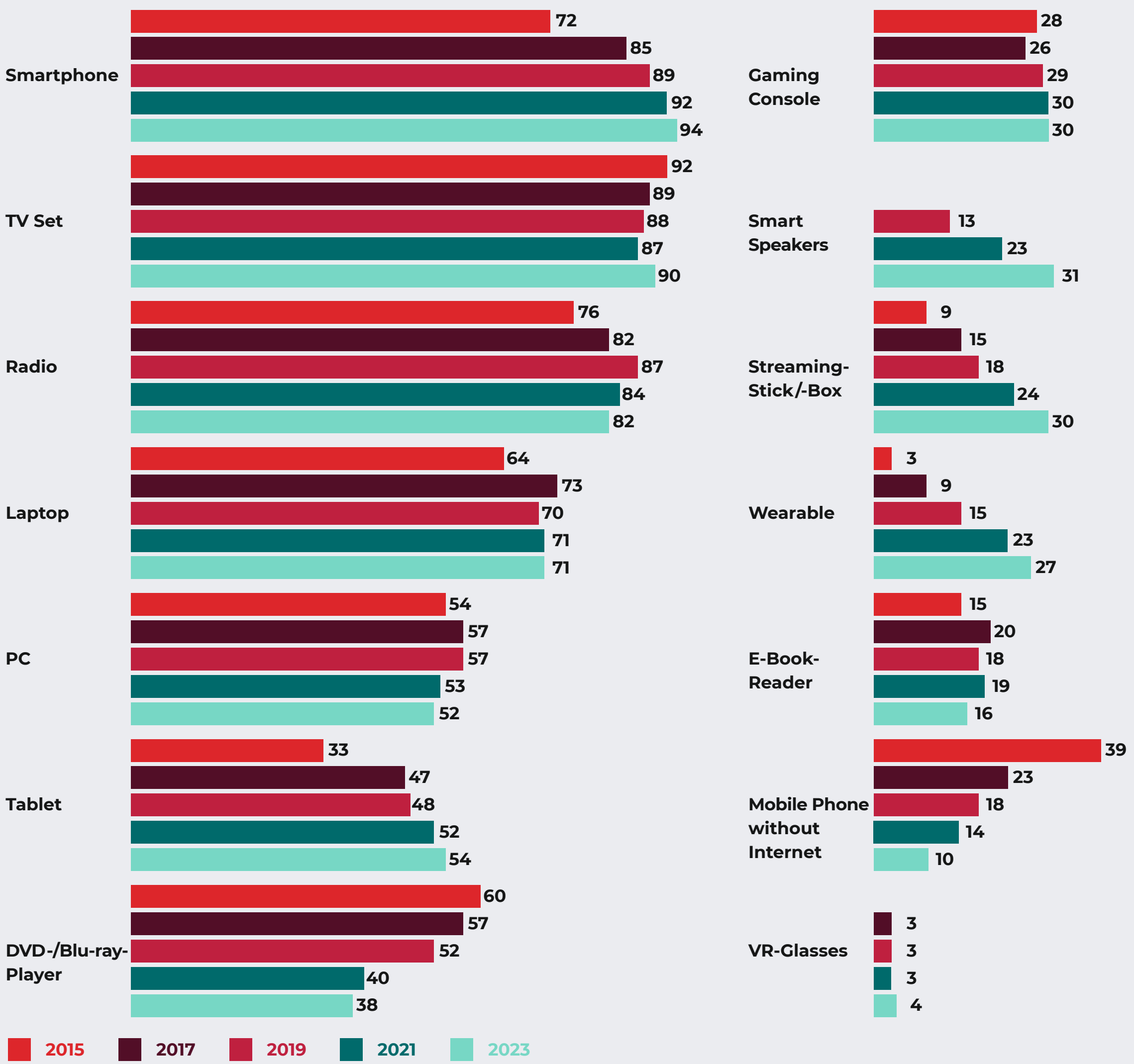
Media Activity Guide 2023

1 Media usage at a glance

Media usage has returned to pre-pandemic levels. People are spending around 12 hours a day with media in 2023. Of this, 2 hours are spent on individual communication and 10 hours on mass media, of which television remains by far the most relevant with more than one-third of the usage duration.

SMARTPHONE AND TV REMAIN THE DEVICES USED MOST FREQUENTLY

Device usage (personal) | Figures in percent



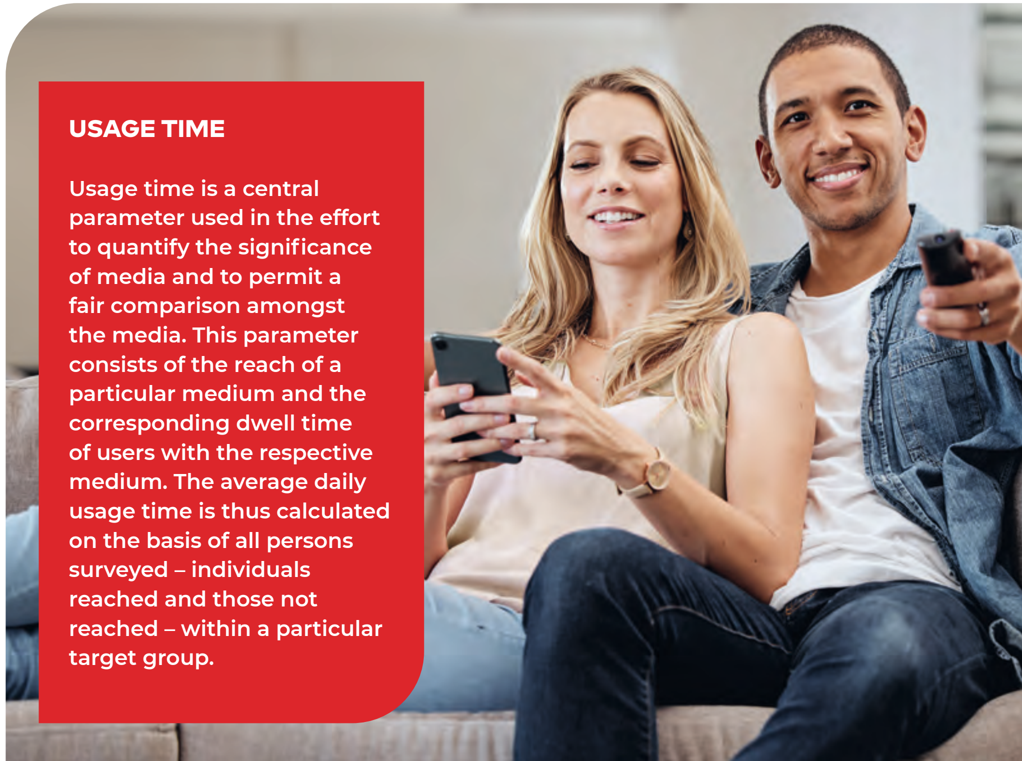
Basis: Adults ages 14-69, n=approx. 2,450 per wave
Source: Media Activity Guide 2023, forsa

SMART TVS ARE CONTINUING TO CONQUER LIVING ROOMS

90 percent of 14- to 69-year-olds still watch films, series or other videos on TV. Smart TVs in particular are continuing to gain in importance: In 2020, 65 percent of all respondents had at least one smart TV in their household; today the coverage has already reached 75 percent. A total of 69 percent of all televisions are Internet-enabled, and 83 percent of these are also connected to the Internet.

At 94 percent, the smartphone remains the most common device in Germany, while classic mobile phones without Internet functions are hardly used any more. Radios (82%) as well as DVD and Blu-ray players (38%) are slightly losing importance, as are eBook readers, which at 16% have dropped back to the level seen in 2015. But the reach of tablets (54%), smart speakers (31%), streaming sticks (30%) and wearables (27%) continues to increase. The penetration of laptops (71%), PCs (52%) and game consoles (30%) remains relatively stable.

The use and distribution of devices is only one major indicator of the relevance of the different media genres. As content has long been consumed on a wide variety of devices, other metrics – such as usage time – must be collected to gain a differentiated sense of the significance of the various channels and offers (see info box).

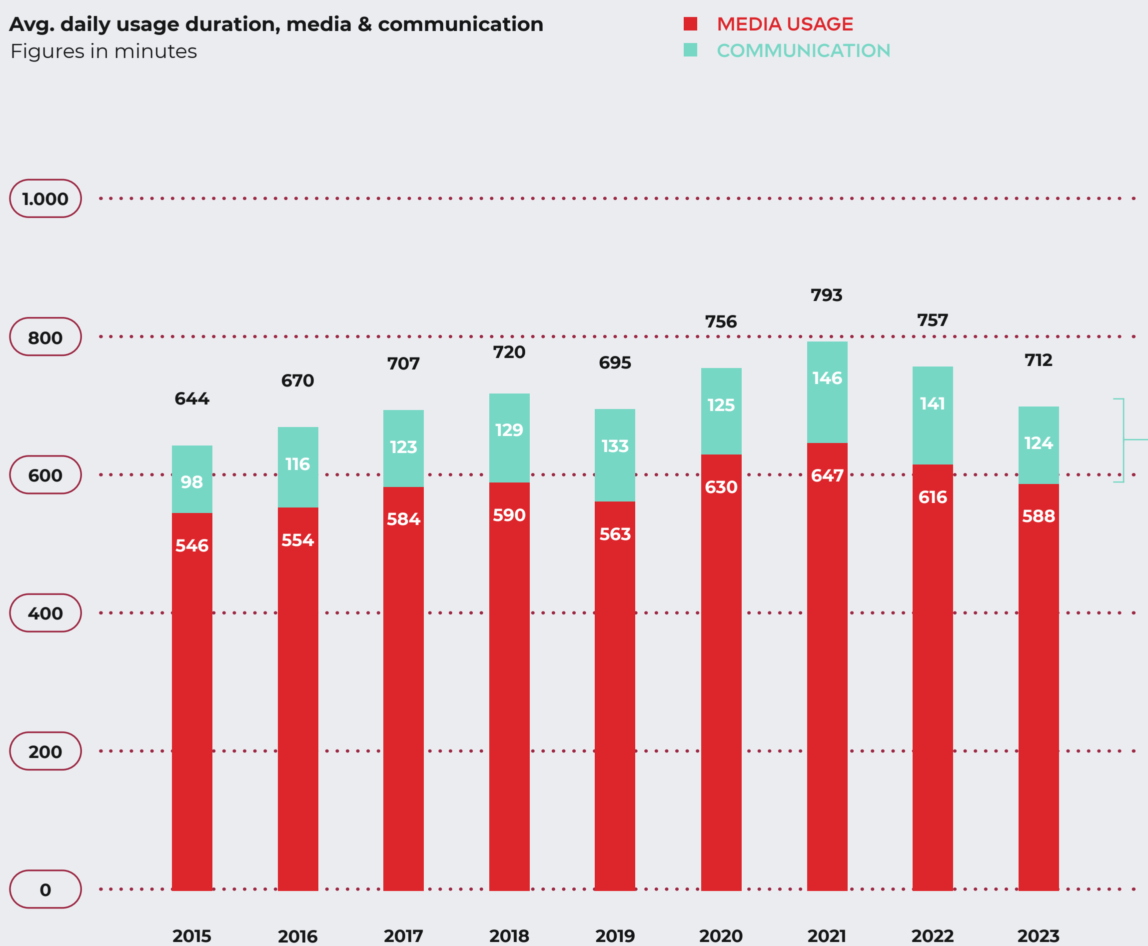


USAGE TIME

Usage time is a central parameter used in the effort to quantify the significance of media and to permit a fair comparison amongst the media. This parameter consists of the reach of a particular medium and the corresponding dwell time of users with the respective medium. The average daily usage time is thus calculated on the basis of all persons surveyed – individuals reached and those not reached – within a particular target group.

Media usage normalises to pre-coronavirus level

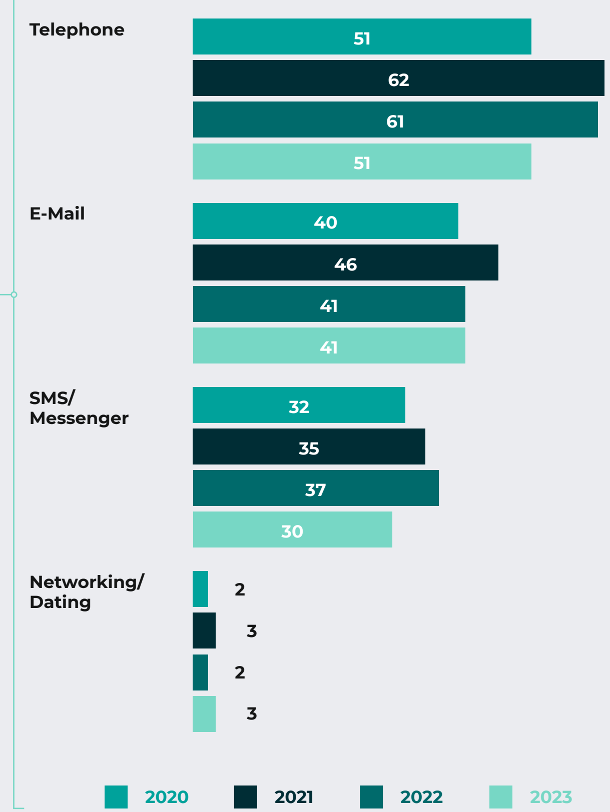
Avg. daily usage duration, media & communication
Figures in minutes



Basis: Adults ages 14-69, n=approx. 2,450 per wave
Source: Media Activity Guide 2023, forsa

Media-based communication declining again

Avg. daily usage duration | Figures in minutes



12 HOURS SPENT ON MEDIA AND COMMUNICATION EACH DAY

The Media Activity Guide compiles data on both the duration of daily media usage and that of individual communication-media usage. Media usage means the reception of content distributed via mass media such as radio and television. Individual communication, on the other hand, comprises device-assisted communication between individuals.
Germans spend around 12 hours a day with mass and individual communication. This value is at roughly the same level as during the years before the outbreak of the pandemic. At 588 minutes, mass-media usage reached the maximum value measured before the coronavirus outbreak in 2018. At 124 minutes, individual communication, on the other hand, is even lower than its pre-pandemic values. It is noticeable here that working life is becoming more and more normalised as people return to their offices.
A more thorough analysis since the coronavirus outbreak confirms these effects: (Video) telephony initially rose significantly due to the pandemic and has currently returned to the level of early 2020. During this time, messenger services have also benefited from the fact that people could meet in person only to a limited extent. Meanwhile, with around half an hour of daily usage, these services are used for a similar amount of time as before COVID-19.

MEDIA USAGE

Daily media usage totals to nearly 12 hours.

NEW: CHANGE IN METHODOLOGY

The ViewTime Report previously queried video usage mainly by category. In addition to TV, DVD/Blu-ray and cinema, this also included free and paid online videos.
This distinction is growing increasingly difficult for respondents, however, due to free advertising-funded SVoD products such as Amazon's freevee or paid supplemental offers of essentially free services (e.g. Joyn+ or RTL+). Therefore, as part of a method test, we compared a provider-centred survey of the online video market with the previous methodology. We found that for now the two methodologies still arrive at very similar results. As a further mixing of the various video offers and increased popularity of hybrid models is foreseeable, the ViewTime Report switched to the new methodology effective Q1 / 2023.

Respondents are surveyed with regard to the following online video offers:

- BVoD by public broadcasters, Joyn, RTL+
- YouTube
- SVoD services Netflix, Amazon Prime Video, Disney+, WOW and DAZN
- Video usage of social media on Facebook, Instagram, Snapchat, TikTok, Twitter and Twitch

An additional open-ended survey of other providers used shows that this covers nearly the entirety of video usage. We will use this routine regularly to ensure the completeness of the providers surveyed and to integrate newly emerging relevant market participants in a timely fashion.

The various providers are now assigned on the basis of the new categories:

- BVoD
- YouTube
- SVoD (Subscriptional Video-on-Demand)
- Social-media video

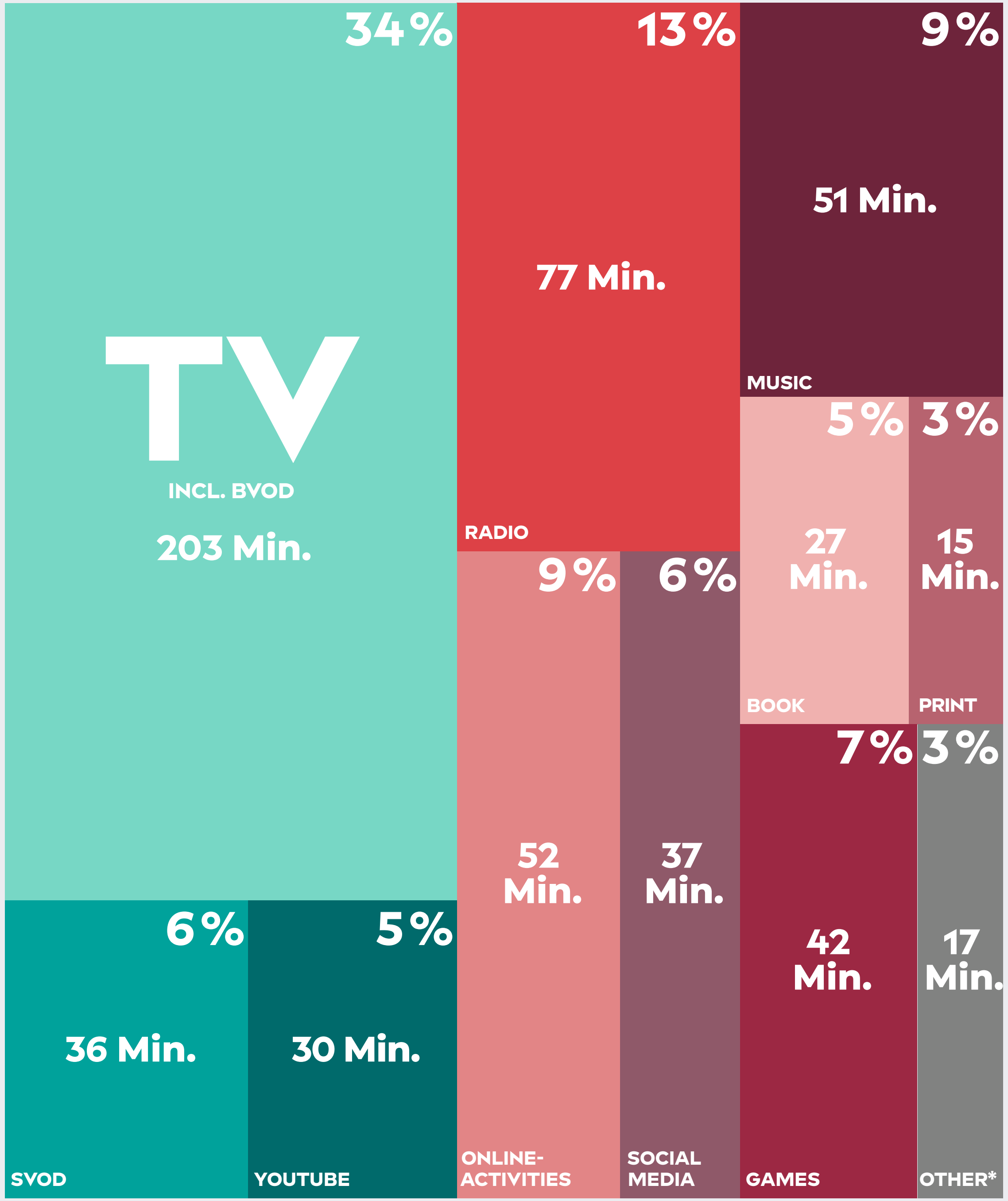
Thanks to the new methodology, these can also be reliably assigned, calculated and reported on in both of our studies – ViewTime Report and Media Activity Guide.

TV REMAINS THE DOMINANT MEDIUM

At more than 200 minutes a day, television including BVoD accounts for more than one-third of media usage. Hence, even though the duration of viewing has declined, TV remains by far the medium with the greatest usage. Following in a distant second place is radio, which has also lost usage and is only used for around one and a quarter hours a day. 52 minutes are spent on online activities such as online shopping, navigation and banking, eLearning, and reading articles and posts. These activities also peaked during the coronavirus period and are currently losing some of their significance again: Internet usage still totalled to 57 minutes in 2021. The duration of usage of blogs and forums, and of online shopping, is trending downward here in particular. On the other hand, usage of social media, which we now show separately, is growing. At 37 minutes a day, significantly more time is devoted to it than 2 years ago (29 minutes). This owes chiefly to the increasing popularity of video offers on social media (see Section 4: Online usage).
Relevant usage shares are also attributable to music (51 minutes), games (42 minutes), SVoD (36 minutes) and YouTube (30 minutes). The duration of usage of print media continues to decline – at just 15 minutes, it has been halved since 2017. Books are read for just under half an hour a day, about the same length of time as in recent years.

one-THIRD OF media usage IS TV

Avg. daily usage duration
For precise definitions of the individual media offerings, see page 84

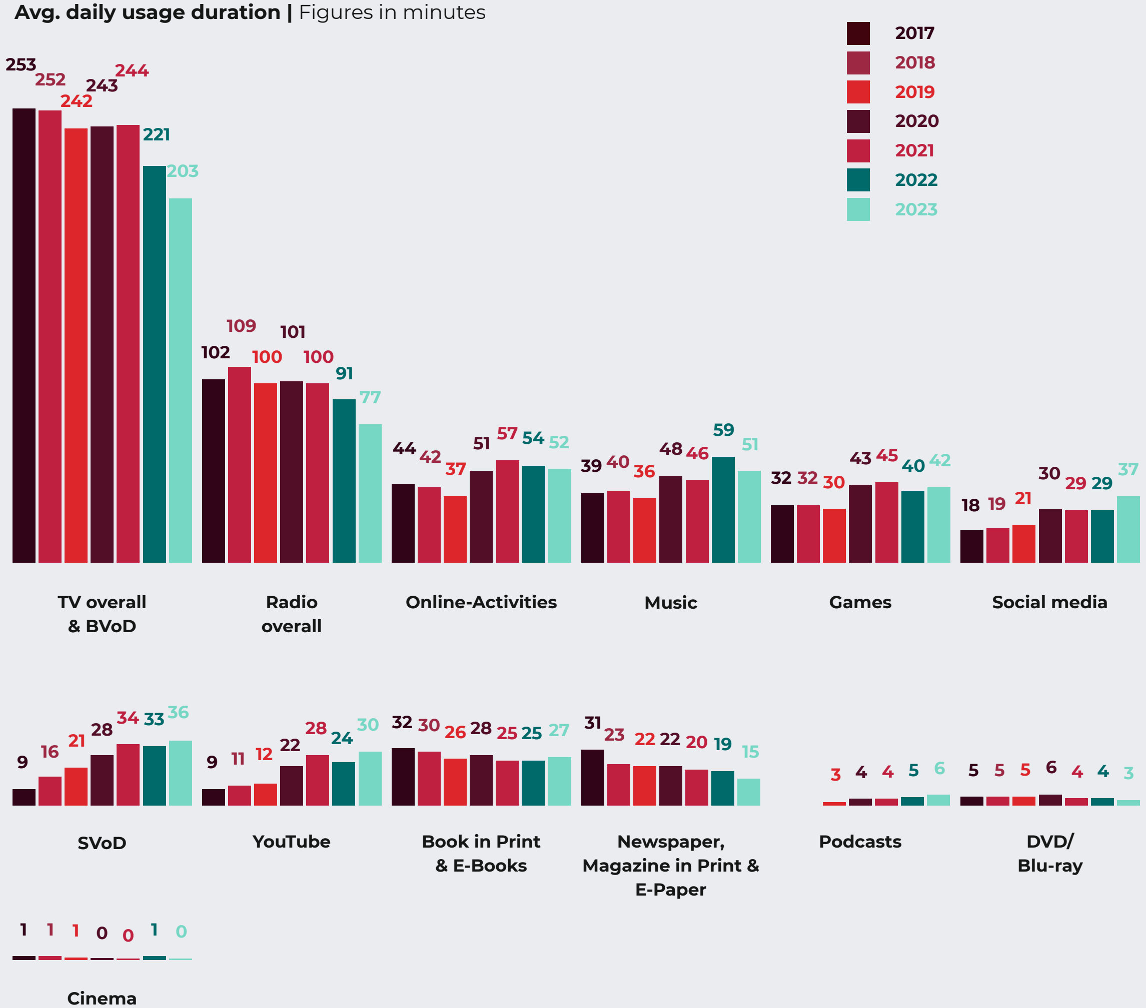


*DVD/Blu-ray, podcasts, audio books, cinema
Basis: Adults age 14-69, n=2,444
Source: Media Activity Guide 2023, forsa; AGF video research in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, Q1-2023, own internal calculations, TV incl. alternative use

TV accounts for the largest share of daily media usage

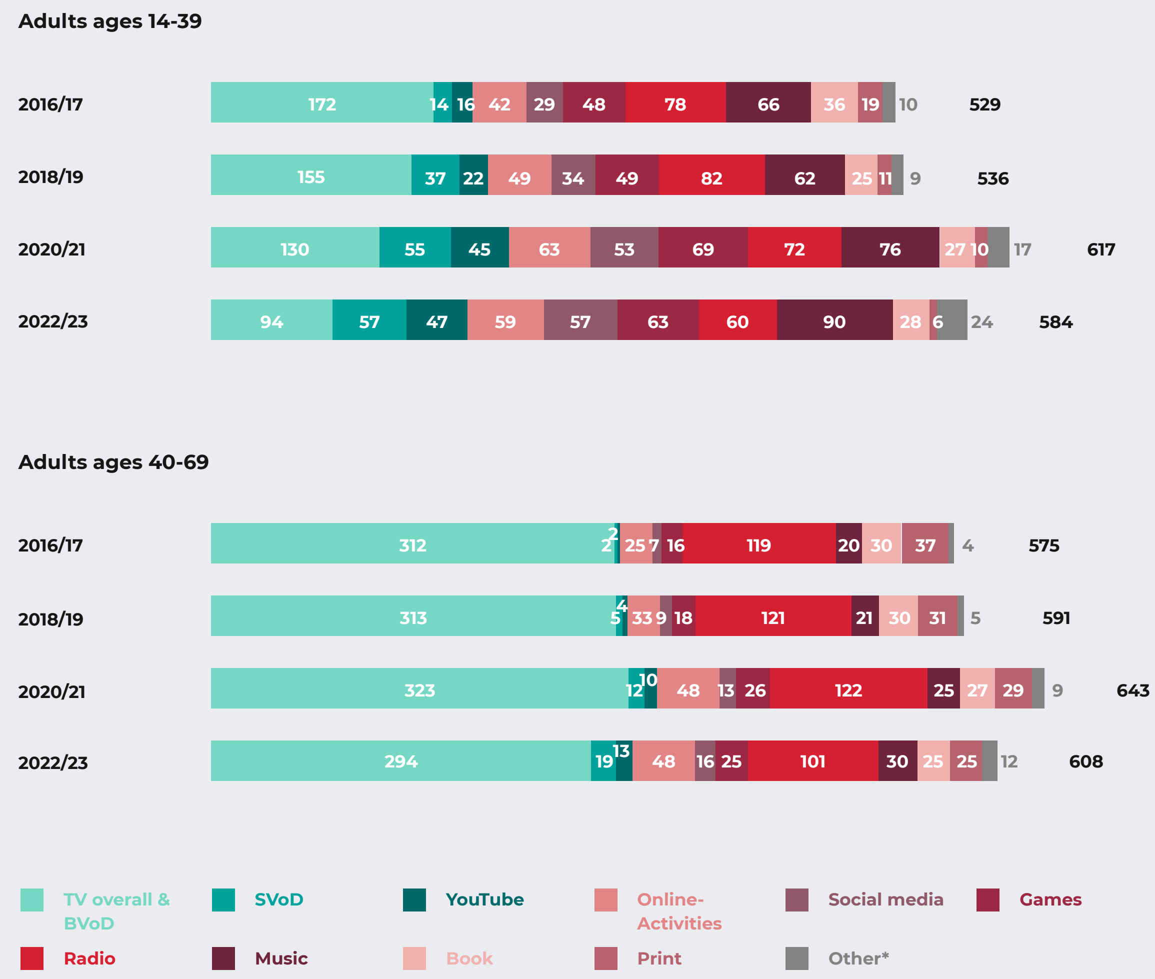
TV DROPPING AT A HIGH LEVEL, SOCIAL MEDIA GROWING

Avg. daily usage duration | Figures in minutes



Basis: Adults ages 14-69; n=approx. 2,450 per wave
Source: Media Activity Guide 2023, forsa; AGF video research in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, Q1/19/20/21/22/23, own internal calculations, TV incl. alternative usage

NORMALISATION OF MEDIA USAGE AT A HIGH LEVEL



*DVD/Blu-ray, cinema, podcast, audio book
Basis: Adults ages 14-39, n=approx. 1,000 per 2-year wave; Adults ages 40-69 n=approx. 1,400 per 2-year wave
Source: Media Activity Guide 2023, forsa; AGF video research in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, Q1-2023, own internal calculations, TV incl. alternative usage

SHIFTS, PARTICULARLY AMONG YOUNGER PEOPLE

Considering the trend in media usage by category among younger and older people (under and over the age of 40), common features and differences can be seen. The trends in overall media usage are similar in both target groups: It rose significantly during 2020 and again 2021, years marked by the pandemic.
While it is declining again at the moment, it is still well higher than the 2018/19 level for younger and older people alike. Levels of usage by the two target groups are also converging. While older people used media for about an hour longer than younger people in 2016/17, that gap has now shrunk to roughly 20 minutes.
There are significant differences in the usage shares of the various media, as well as in the shifts seen over time. The changes are more pronounced among younger people, who generally report stronger usage of digital media. Usage of SVoD, YouTube, social media, games and music as well as online activities has grown significantly in this target group in particular, at the expense of traditional media. The changes are less pronounced among those over the age of 40. They, too tend to increase SVoD usage and online activities, while TV and radio lose ground.

CONCLUSION

TV sets and smartphones are the devices with the most frequent usage – with smart TVs continuing to gain in significance.

Wearables and streaming sticks/boxes are growing increasingly widespread.

At around 12 hours, overall media usage (mass and individual communication) has returned to pre-pandemic levels.

Usage of mass media stands at roughly 10 hours a day, with television still accounting for the largest share.

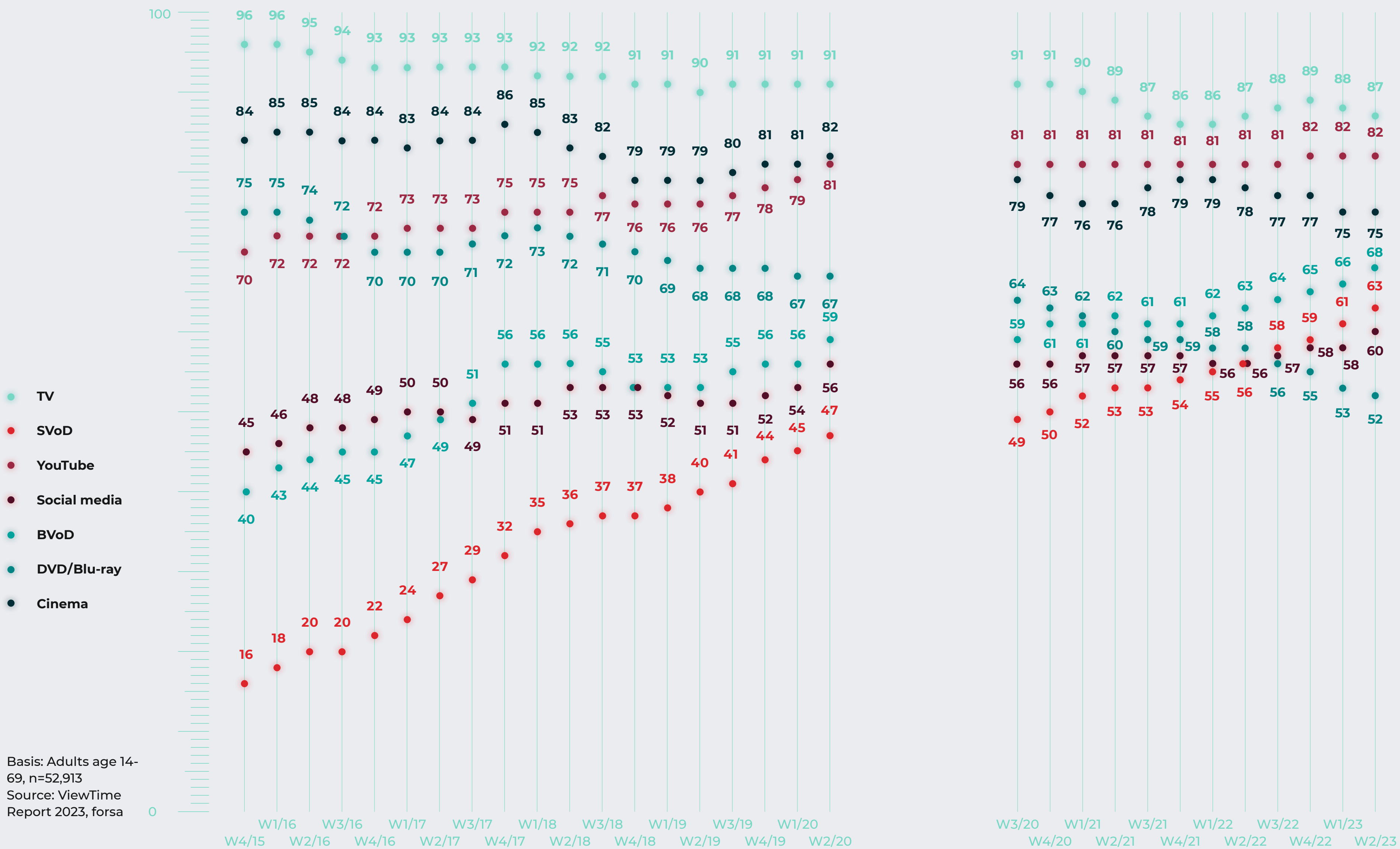
Growth in usage of social media is considerable.

2 Usage of Video Content

All in all, Germans spend around 4.5 hours a day on video content. Considering that devices are also used in parallel, the 'net value' is slightly lower. Following the coronavirus peak seen in 2020 and 2021, video usage is thus normalising at a level slightly higher than pre-pandemic levels. Although classic television has continued to lose, it still has a very high reach and duration of usage. SVoD offers are gradually reaching saturation limits; while YouTube continues to grow, it still plays no relevant role on the big screen.

BVOD IS GAINING USERSHIP

Usage of video offers (rolling) | Figures in percentages, usage at least rarely



Basis: Adults age 14-69, n=52,913
Source: ViewTime Report 2023, forsa

TV REMAINS THE DOMINANT MEDIUM FOR VIDEO

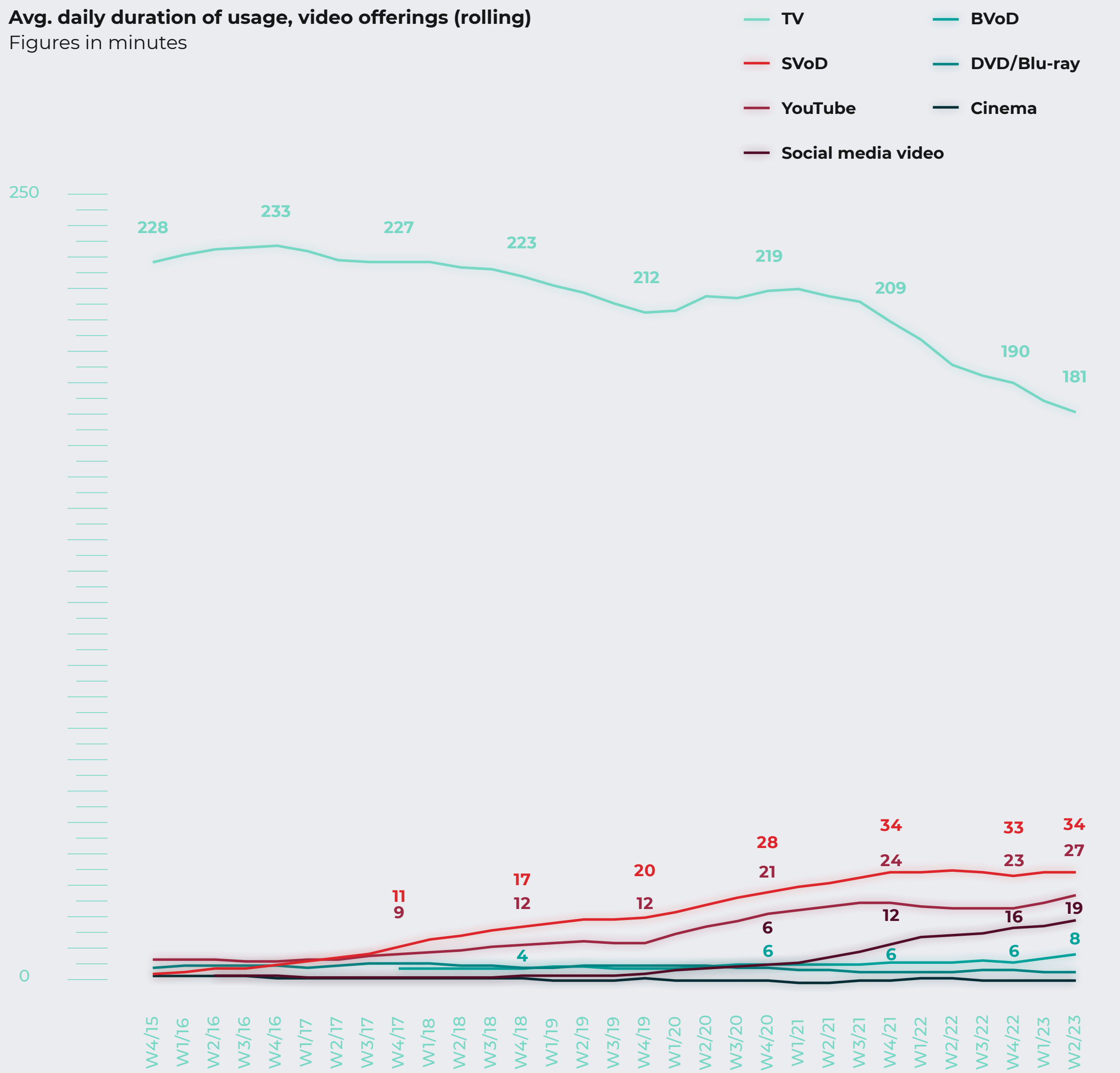
Across the overall sample of 14-69-year-olds, however, television is the video medium with the greatest reach. The broadest group of users, i.e. the proportion reporting usage at least rarely, is consolidating at around 87 percent. TV reaches 80 percent of 14- to 49-year-olds and three-quarters of those under 30, which is as many as a year ago. While the reach of YouTube is holding steady at a high level and SVoD, BVoD and social-media videos are gaining new users, the audience for physical media such as DVDs and Blu-rays is dwindling more and more. In 2015, they were still used by three-quarters of the population; today the broadest user group stands at a little more than 50 percent.

The duration of usage of TV continues to decline but remains still at a very high level of 3 hours a day. This means that TV is still by far the most popular video medium. Linear television and Broadcaster Video on Demand (BVoD) account for around 70 percent of total video consumption. The share among 14- to 49-year-olds is just under 50 percent, and even among the young target group of 14- to 29-year-olds, it still accounts for one-quarter of video usage, i.e. on a par with SVoD and greater than the share of videos on YouTube and social media.

The duration of usage of SVoD is holding steady at 34 minutes; YouTube videos are viewed for slightly less than half an hour, videos on social media for just under 20 minutes and BVoD for 8 minutes.

TV USAGE DECLINING AT A VERY HIGH LEVEL

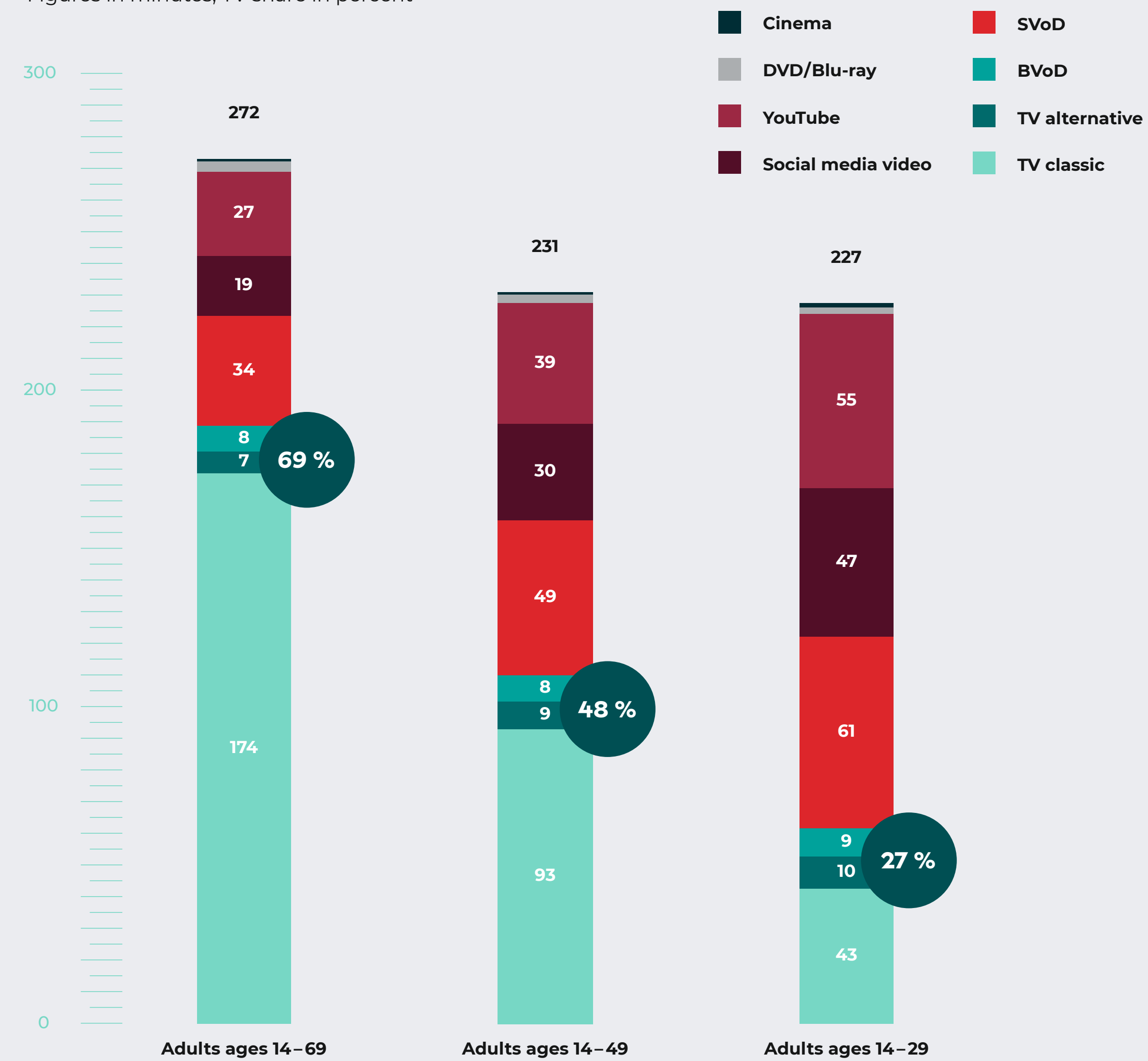
Avg. daily duration of usage, video offerings (rolling)
Figures in minutes



Basis: Adults age 14-69, n=52,913
Source: ViewTime Report 2023, forsa; AGF video research in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, own internal calculations; TV incl. alternative TV usage

TV HAS A HIGH SHARE OF VIDEO USAGE

Video usage and TV share by target groups (rolling)
Figures in minutes, TV share in percent



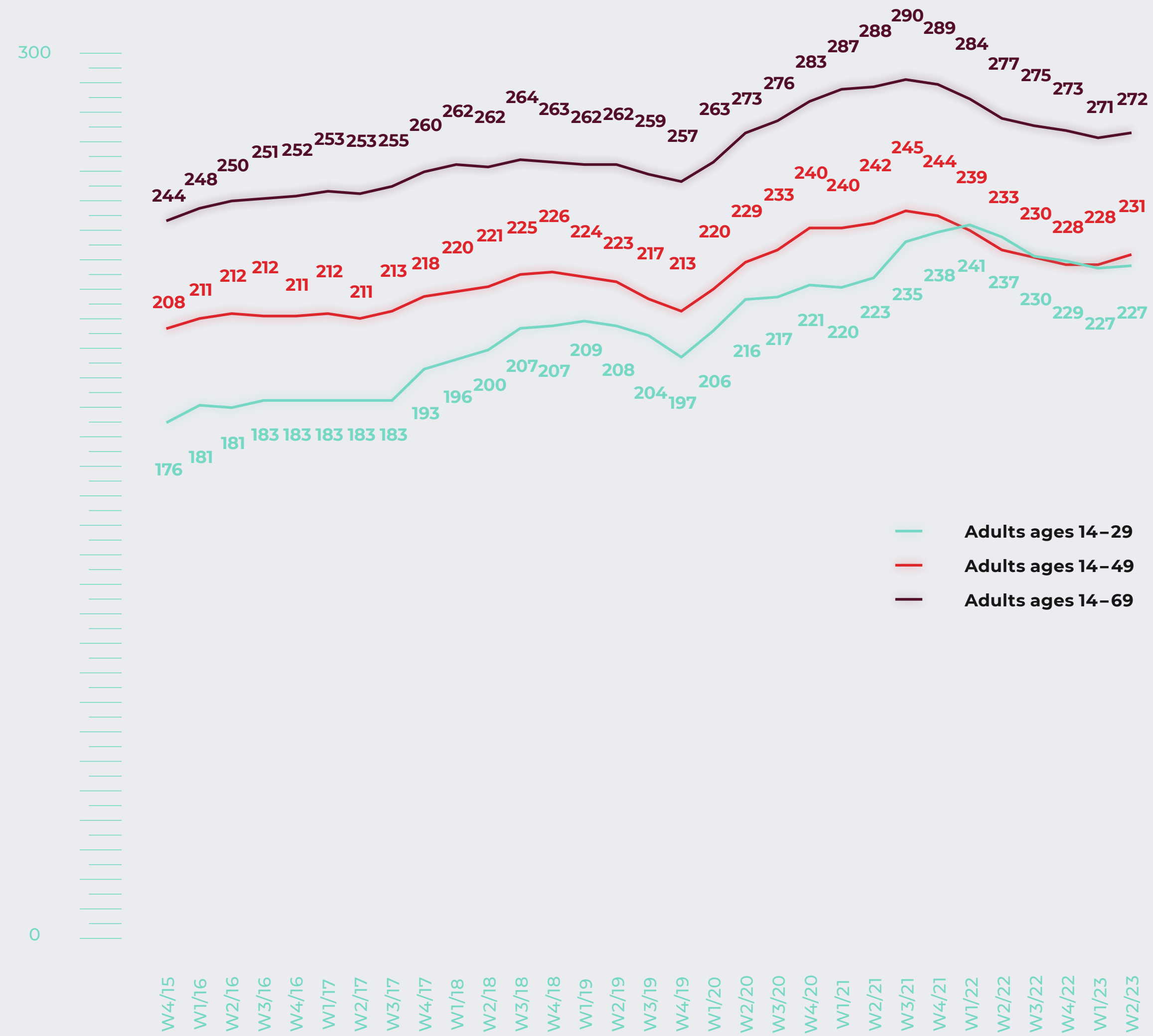
Basis: Adult age 14-69, n=6,124
Source: ViewTime Report 2023, forsa; AGF video research in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, own internal calculations; TV incl. alternative TV usage

FOUR AND A HALF HOURS OF VIDEO

In total, overall video usage across all channels investigated for the entire target group totals to a considerable 272 minutes; this falls short of the peak value witnessed during the coronavirus pandemic but still exceeds the pre-pandemic level of around 260 minutes. A very similar trajectory can be seen among 14- to 49-year-olds at a slightly lower level – currently 231 minutes. The situation is different in the young age group of 14 to 29-year-olds, whose video usage reached its peak after a bit of a delay. This is probably down to the fact that usage of videos on social media, which is particularly widespread among young people, rose sharply in 2021, driven by the success of offers such as TikTok and Instagram Reels. Since then, this target group has been on a par with the 14- to 49-year-olds in terms of overall video usage, although previously it was lower sometimes substantially.

VIDEO USAGE STILL EXCEEDS PRE-CORONAVIRUS LEVEL

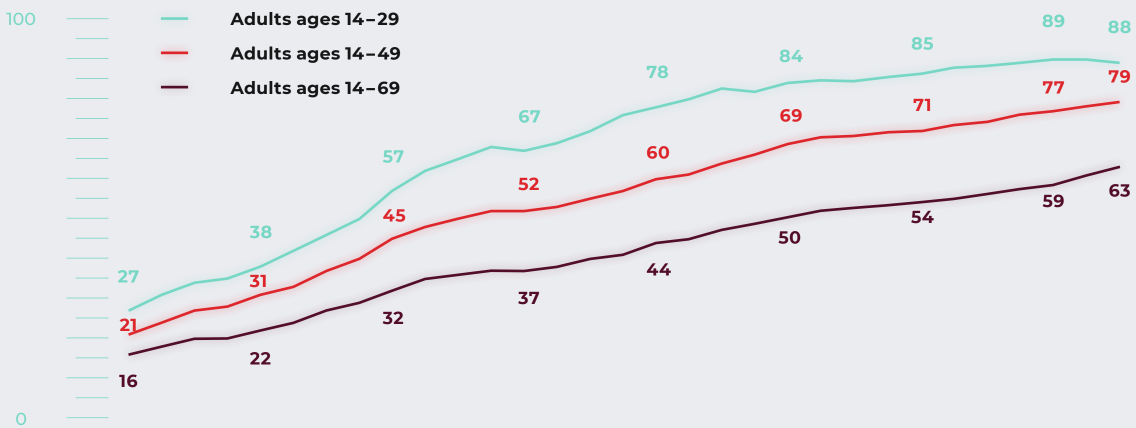
Avg. daily duration of usage, video offerings total (rolling)
Figures in minutes



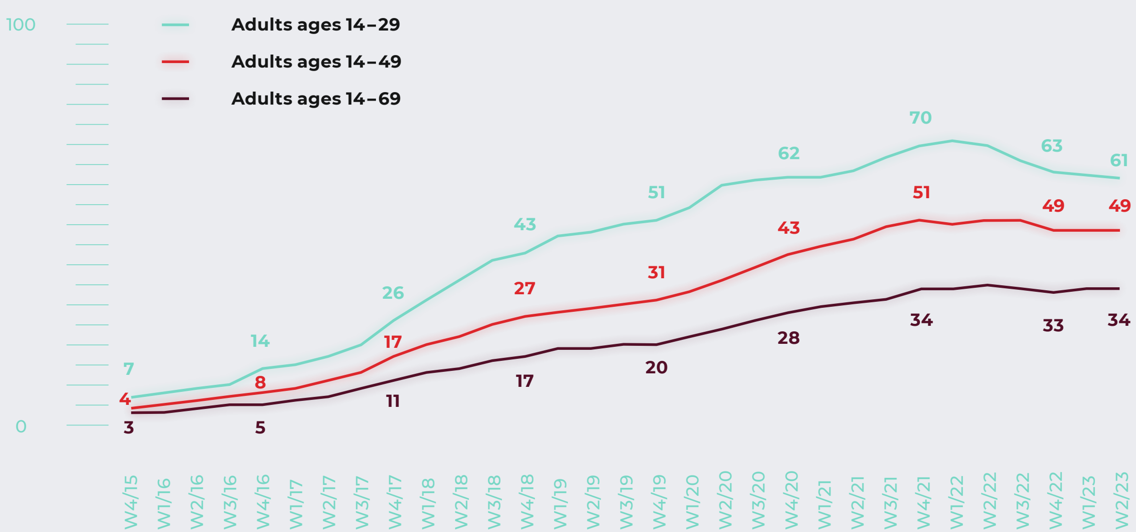
Basis: Adults age 14-69, n=52,913
Source: ViewTime Report 2023, forsa; AGF video research in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, own internal calculations; TV incl. alternative TV usage

SVOD: REACH INCREASING, BUT NOT DURATION OF USAGE

Usage of SVoD (rolling) | Figures in percentages, usage at least rarely



Avg. daily duration of usage, SVoD (rolling) | Figures in minutes



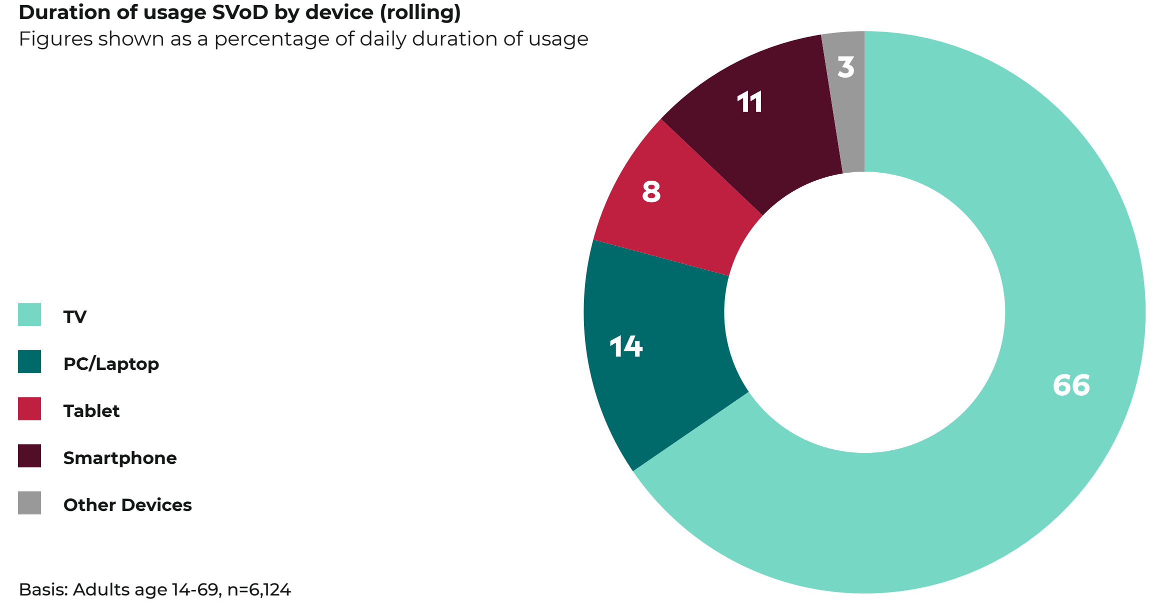
Basis: Adults age 14-69, n=52,913
Source: ViewTime Report 2023, forsa

SVOD REACHING SATURATION LEVELS

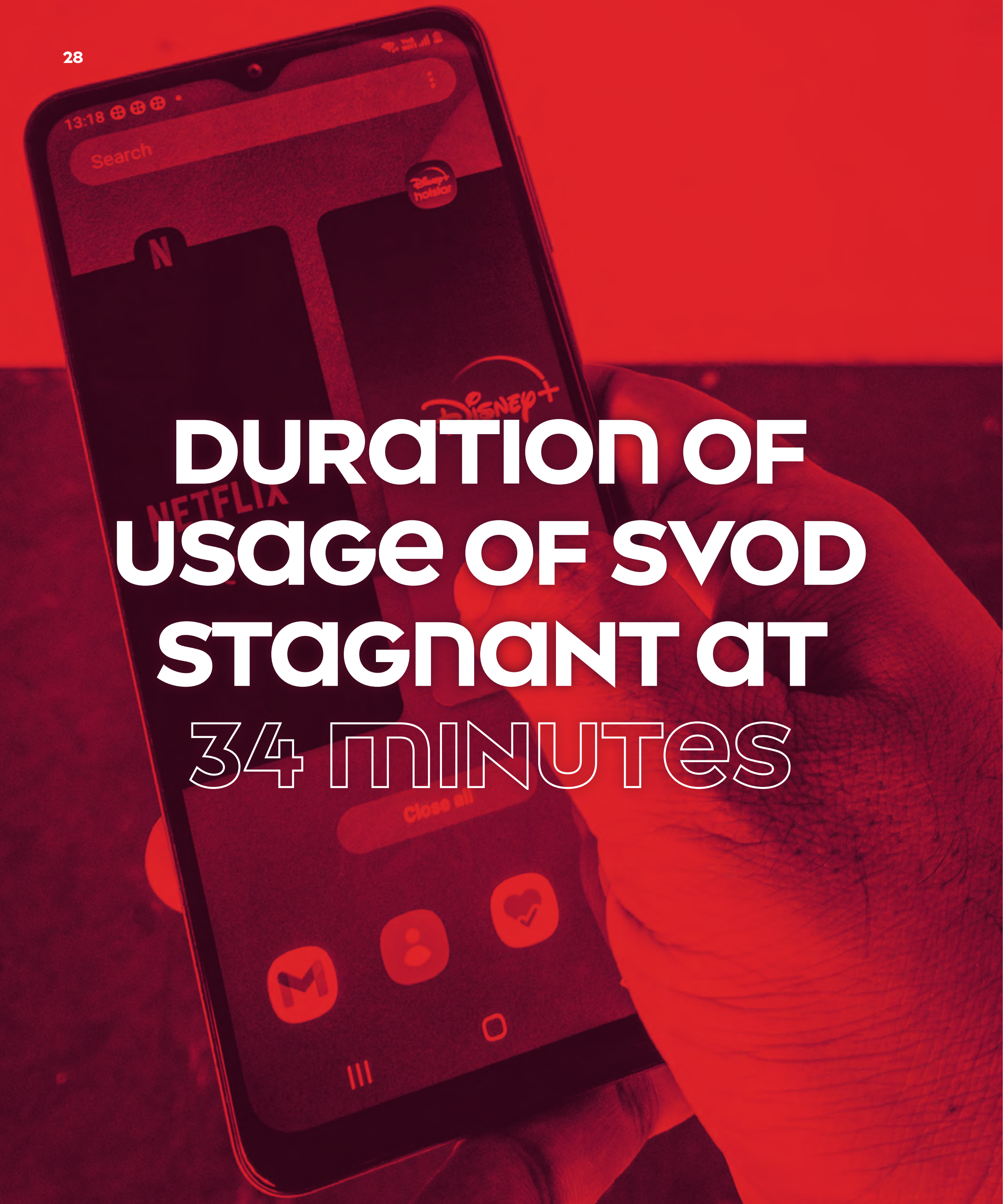
The distribution and usage of paid video offers such as Netflix and Prime Video rose slowly but steadily until 2017. Since then, growth gained momentum, particularly among the young target group of under-30s. In the course of the pandemic, the middle age group then followed suit. Nearly 80 percent of 14- to 49-year-olds now use SVoD, at an average of around 50 minutes per day. This growth also affects the overall target group, in which the reach of paid video offers exceeds 60 percent. For around one and a half years, however, the duration of usage has reached a saturation level of around 35 minutes. In combination with further increase in reach, this means a reduction in dwell time. Hence, individual viewers are making less extensive use of SVoD offers.
Films or even series with a duration of at least 30 to 45 minutes per episode are simply the most fun to watch on the large TV screen. This makes it entirely plausible that SVoD usage occurs predominantly on the big screen. The share of usage of Connected TV now stands at 66 percent and has thus grown by 2 percentage points in each of the past two years.

SVOD IS MAINLY USED ON THE BIG SCREEN

Duration of usage SVoD by device (rolling)
Figures shown as a percentage of daily duration of usage



Basis: Adults age 14-69, n=6,124
Source: ViewTime Report 2023, forsa



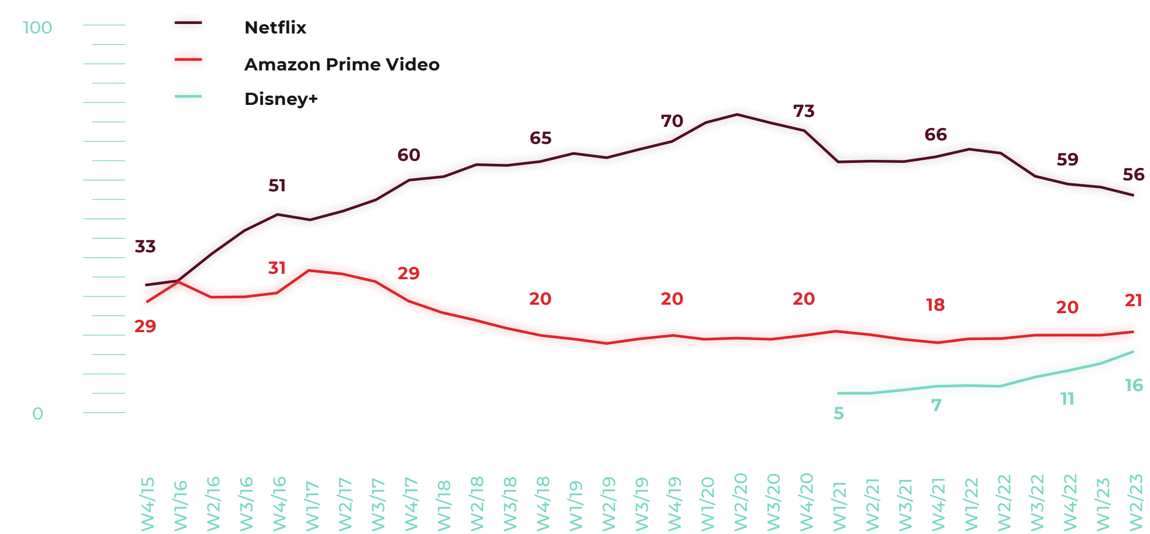
DURATION OF USAGE OF SVOD STAGNANT AT 34 MINUTES

NETFLIX LOSING MARKET SHARE

With a 56 percent share of the duration of usage, Netflix still dominates paid online videos but in a comparison with the competition has steadily been losing significance for years. Netflix was the top dog in the SVoD market until mid-2020 and had grown its market share to up to 77 percent. Around 3 years ago, the provider was initially growing at just a disproportionately low rate; for around the past year, its duration of usage has even declined. At the same time, newcomer Disney+ in particular managed relatively quickly to establish an offer that, with its current share of 16 percent, apparently resonates well with the audience. This has an impact for Netflix: The streaming service is losing around 20 points of market share, even as Amazon Prime Video defends its share of around 20 percent of duration of usage.

NETFLIX LOSES DURATION-OF-USAGE SHARE TO DISNEY+

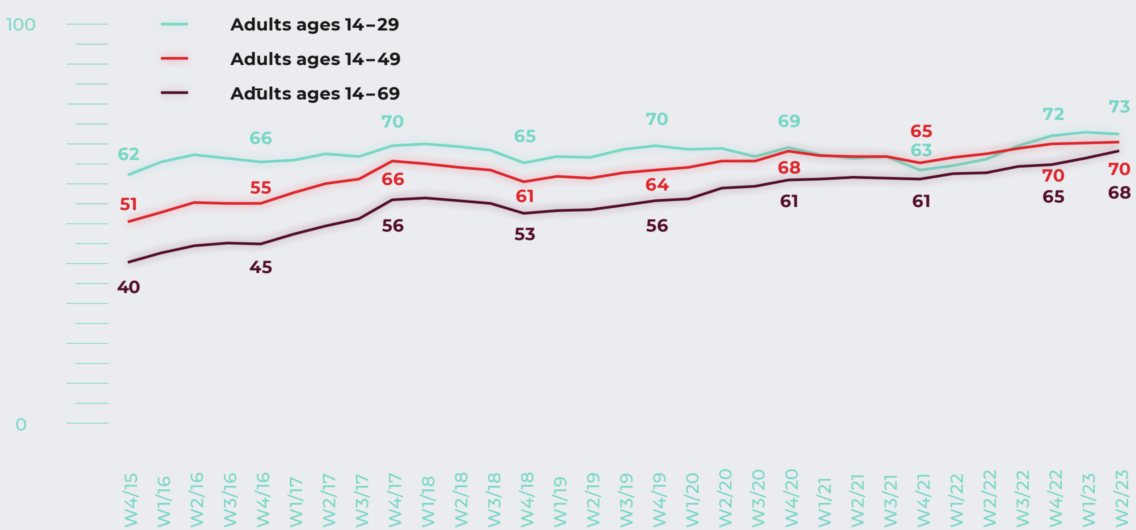
Duration-of-usage share SVoD by provider (rolling) | Figures shown as a percentage of daily duration of usage



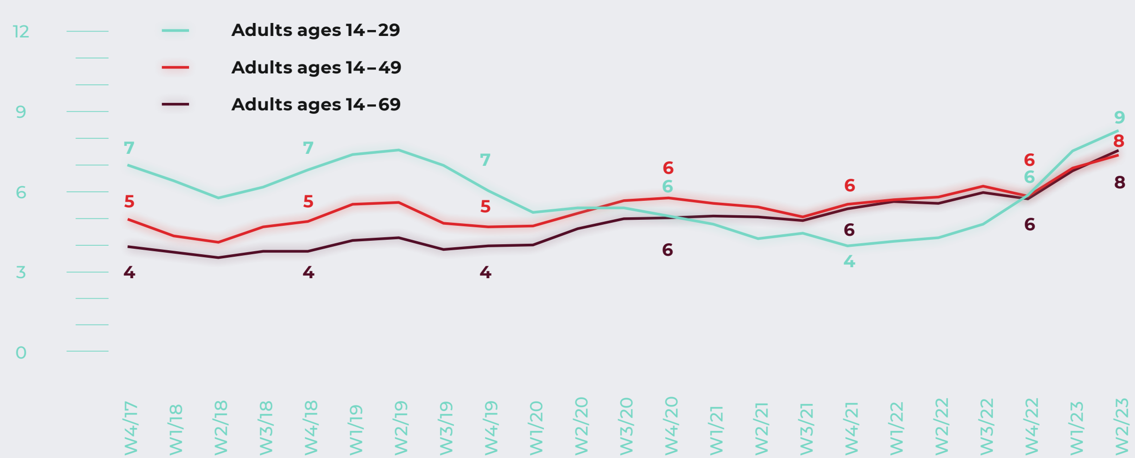
Basis: Adults age 14-69, n=52,913
Source: ViewTime Report 2023, forsa

BVOD: POSITIVE TREND IN DURATION OF USAGE

Usage BVoD* (rolling) | Figures in percentages, usage at least rarely



Avg. duration of usage BVoD (rolling) | Figures in minutes



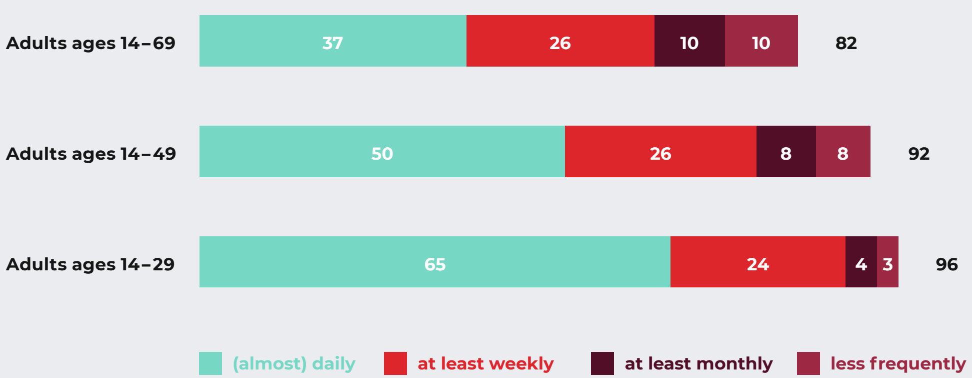
Basis: Adults ages 14-69, n= 52,913/n =40,592; * Usage of station BVoD from Q2/19 including Joyn & RTL+
Source: ViewTime Report 2023, forsa

TREND TOWARDS BVOD AND YOUTUBE

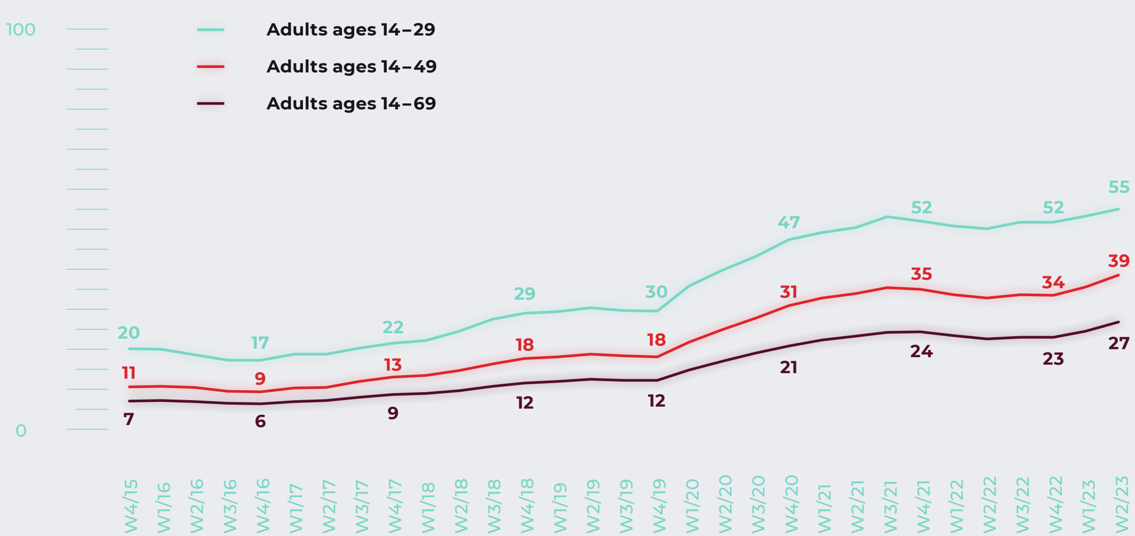
As more and more TVs are now Internet-enabled, more and more people are also using TV content via BVoD. These include the BVoD of public broadcasters as well as Joyn and RTL+ (formerly TVNow), the streaming platforms of the large private broadcasting groups. They are in a position to continuously grow their usership and now reach 68 percent of the overall target group and even 73 percent of those under the age of 30. The trend in duration of BVoD usage is upward and currently stands at around 8 minutes per day.
YouTube now reaches more than 80 percent of the population, over 90 percent of 14- to 49-year-olds and, at 96 percent, nearly everyone under the age of 30 – two-thirds of these even on a near-daily basis. The duration of usage of YouTube videos picked up again in the past year; it stands at around 27 minutes for the overall target group and is roughly twice as high among 14- to 29-year-olds.
In addition to actual video usage, YouTube is sometimes also used exclusively as an audio medium, e.g. when listening to music via playlists without watching the video at the same time. This form of usage accounts for about one-third of total YouTube usage and is roughly constant across all target groups.

YOUTUBE: DURATION OF USAGE IS GROWING AGAIN

Usage frequency, YouTube (rolling) | Figures in percent



Avg. duration of usage YouTube video (rolling) | Figures in minutes



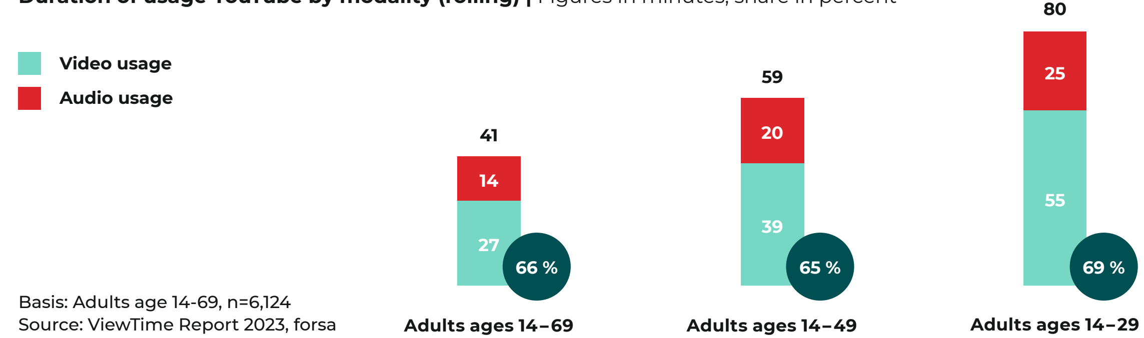
Basis: Adults ages 14-69, n=6,124/ n=52,913
Source: ViewTime Report 2023, forsa

USAGE OF YOUTUBE IS MAINLY MOBILE

The device-specific usage data compiled in the ViewTime report do not confirm the otherwise natural assumption that YouTube usage on the big screen would increase due to growing usage of smart TVs and their comprehensive range of apps. The duration-of-usage share attributable to Internet-connected TV sets is still very low and currently stands at 17 percent. Members of the young core target group view just 14 percent of YouTube videos on the big screen. The share of mobile use, on the other hand, is 50 percent; the remainder of YouTube usage occurs on laptops or PCs.

AUDIO ACCOUNTS FOR ONE-THIRD OF OVERALL YOUTUBE USAGE

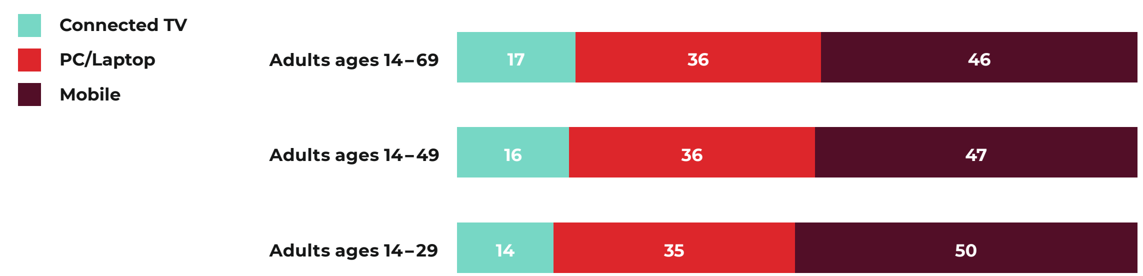
Duration of usage YouTube by modality (rolling) | Figures in minutes, share in percent



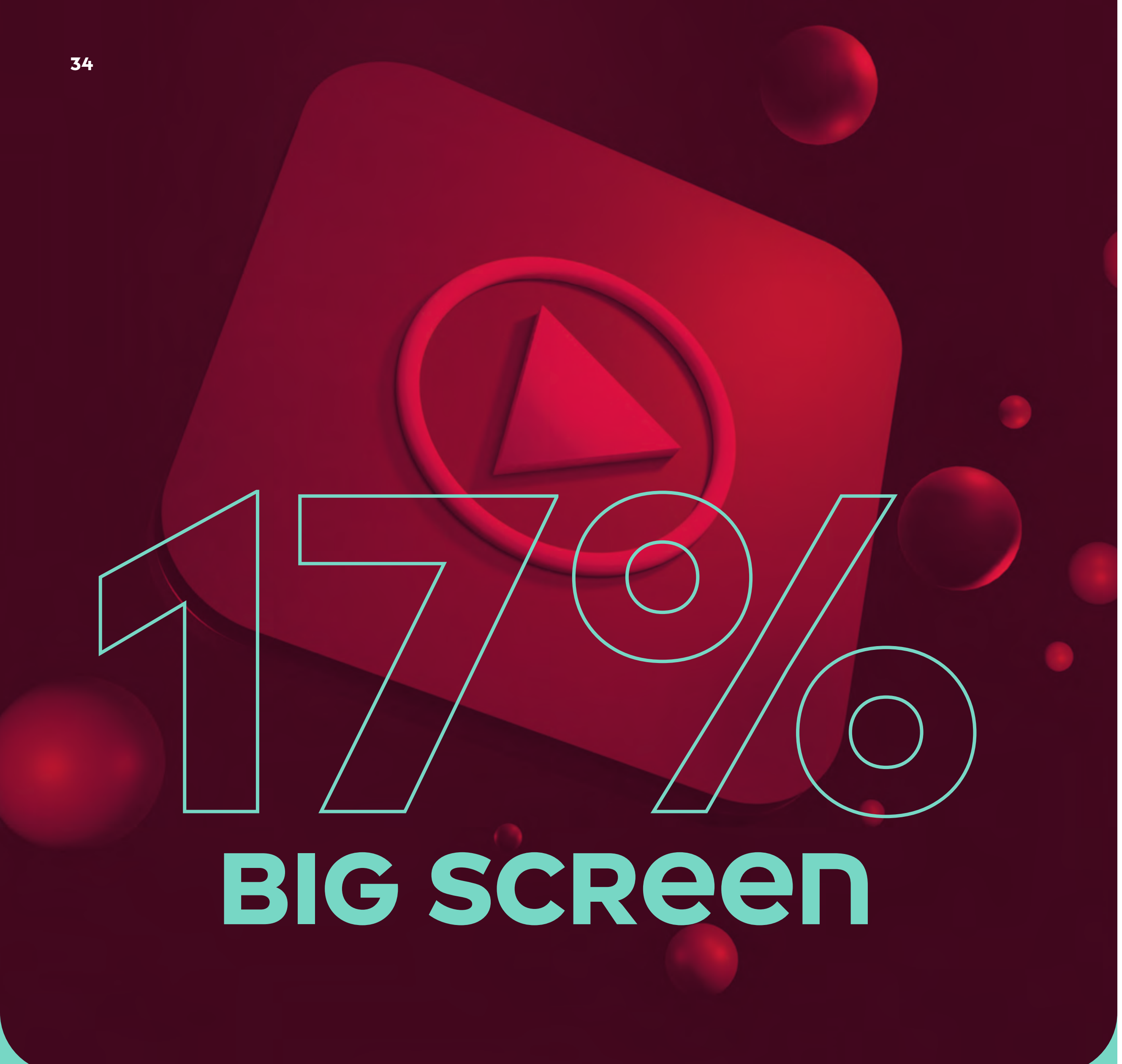
Basis: Adults age 14-69, n=6,124
Source: ViewTime Report 2023, forsa

YOUTUBE IS BARELY RELEVANT ON THE BIG SCREEN

Duration of usage YouTube video by device (rolling) | Figures shown as a percentage of daily duration of usage*



Basis: Adult age 14-69, n=6,124; * 100% missing = other devices
Source: ViewTime Report 2023, forsa



YOUTUBE

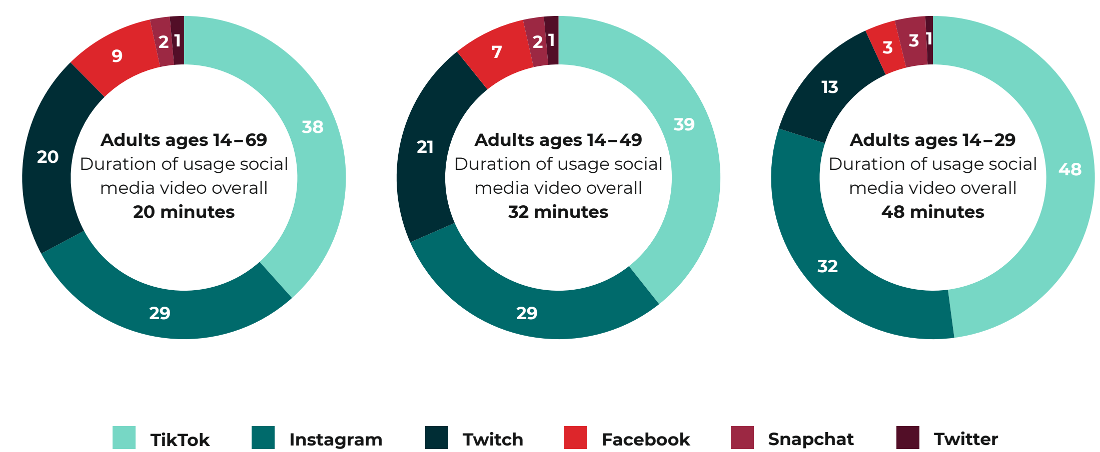
Only a small share of YouTube usage occurs on the TV screen.

TIKTOK DOMINATES SOCIAL-MEDIA VIDEO

TikTok dominates video usage on social media. The video platform with a very young user base even has the highest share of duration of usage in the overall target group of 14- to 69-year-olds, followed by Instagram (Reels) and Twitch. Among people under the age of 30, TikTok accounts for around half of all video usage on social media.
Generally speaking, video usage in social networks is rapidly gaining in importance (see also Section 4: Online usage).

SOCIAL MEDIA VIDEO IS MAINLY TIKTOK, INSTAGRAM AND TWITCH

Duration of usage of social media video by platform (rolling)
Figures shown as a percentage of daily duration of usage

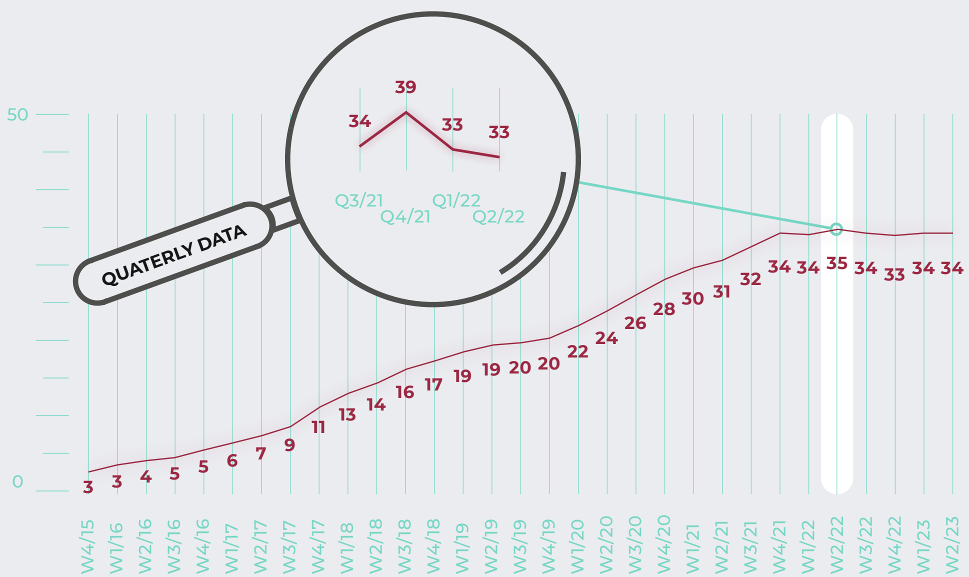


Basis: Adults age 14-69, n=6,124
Source: ViewTime Report 2023, forsa

ROLLING CALCULATIONS

The ViewTime Report has conducted quarterly studies of trends in video usage in Germany since 2015. Each of the rolling-wave figures is based on the average for the preceding 4 quarters. This way, trends can be mapped cleanly on a solid case number basis and adjusted for seasonal effects. The sample figure shows the trend in duration of usage for SVoD: The presentation of quarterly results shows fluctuations that are consistent and explainable against the backdrop of seasonal effects, the pandemic and the highlight strategy of providers such as Netflix. The rolling waves smooth out these fluctuations and illustrate long-term trends, as illustrated in the case of W2/22.
The Media Activity Guide and ViewTime Report data are comparable only up to a point. By comparison to the ViewTime Report, for example, the media offerings presented in the Media Activity Guide are queried just once a year. Analyses from the Media Activity Guide thus depict quarterly data (Q1), while analyses from the ViewTime Report comprise rolling waves. This can lead to deviations in parameters such as the duration of video usage, for example.

Rolling calculation based on example of the duration of usage of SVoD
Rolling = average of the last four quarters (wave)/figures in minutes



Basis: E 14–69 Jahre, n=46.788
Source: ViewTime Report 2022, forsa

CONCLUSION

Overall video usage is stabilizing at a level higher than the level seen prior to the coronavirus pandemic.

Television continues to dominate the video market and enjoys the greatest reach as well as the longest duration of usage.

Although SVoD can gain additional usership, the duration of usage is reaching saturation levels.

BVoD are gaining in reach and duration of usage.

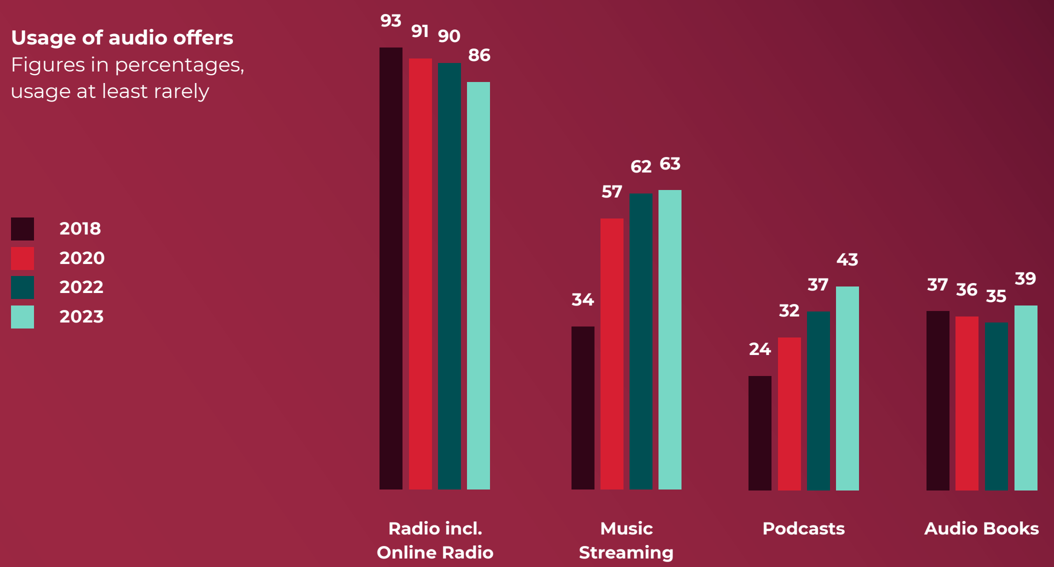
The duration of usage of YouTube is growing. The offer is rarely used on the big screen, however.

3 AUDIO usage

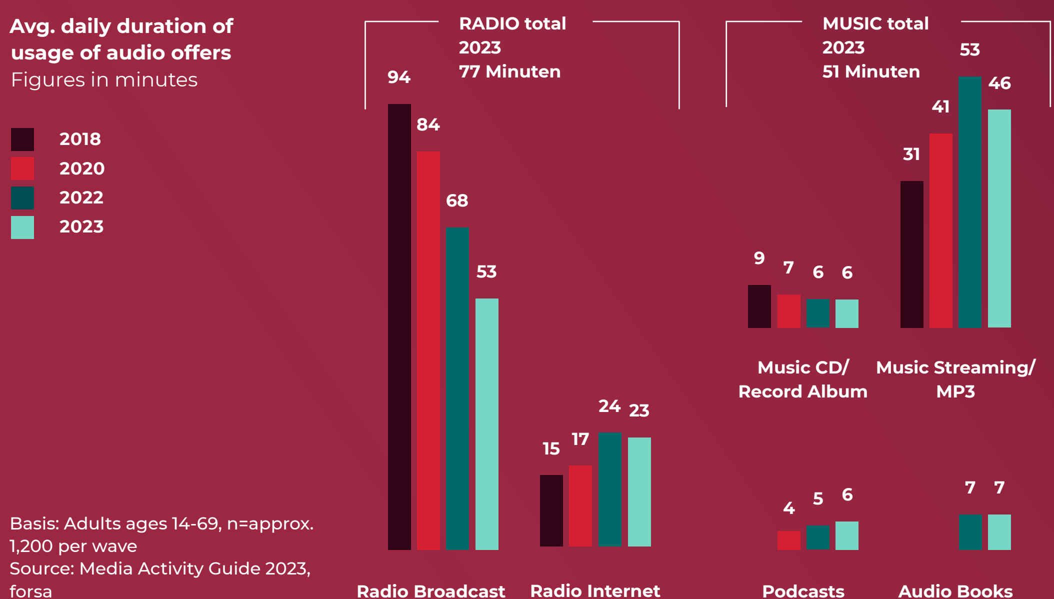
The audio industry is undergoing fundamental change. While physical audio media have become a niche for aficionados and the role of individual digital purchases of titles is decreasing, music is increasingly occurring on subscription-based streaming services. Podcasts have also been gaining in audience, intensity of usage and relevance for years. Classic radio broadcast over the airwaves still enjoys the highest reach and duration of usage.

MUSIC STREAMING SATURATED, PODCASTS CONTINUE TO GROW

Usage of audio offers
Figures in percentages, usage at least rarely



Avg. daily duration of usage of audio offers
Figures in minutes



Basis: Adults ages 14-69, n=approx. 1,200 per wave
Source: Media Activity Guide 2023, forsa

DESPITE ITS LOSSES, RADIO REMAINS THE MOST POPULAR AUDIO MEDIUM

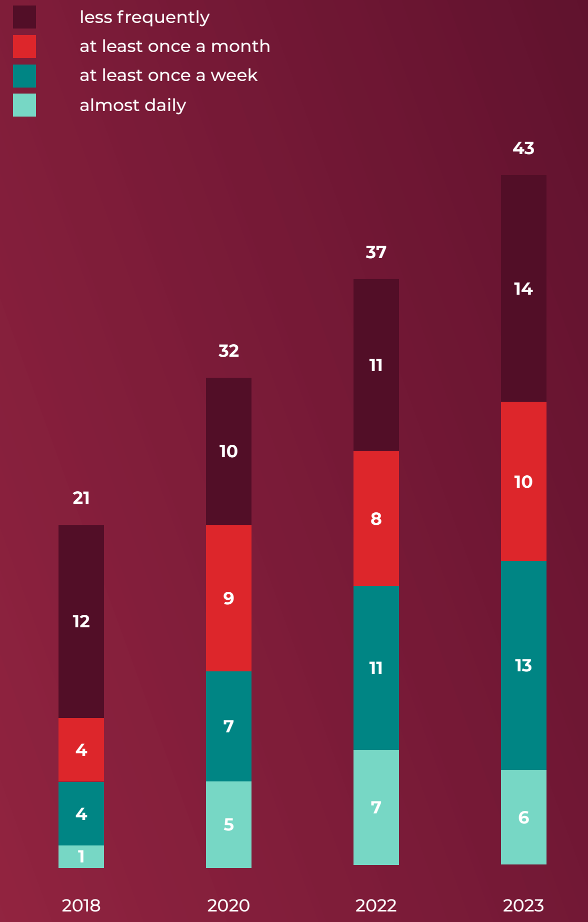
86 percent of Germans listen to radio at least occasionally via radio broadcasts or online; this figure stood at 90 percent last year. The average duration of usage, 77 minutes per day, is also down sharply year-over-year. Usage of online radio is stabilising at just over 20 minutes, while classic radio usage in particular is falling to a record low of well under an hour. In spite of these losses, radio remains the most relevant audio medium. Usage of music streaming is stagnant both in terms of reach (63 percent) and duration of usage, which has dropped back down to 46 minutes following the high mark seen in 2022. Podcasts now reach their broadest user base of 43 percent as they gradually distinguish themselves from audio books, which have a reach of slightly less than 40 percent. While physical audio media have gradually been substituted through streaming, they are currently levelling off at a duration of usage of 6 minutes. This is also due to continued high relevance of record albums among aficionados.

PODCASTS ARE RAPIDLY GAINING IN IMPORTANCE

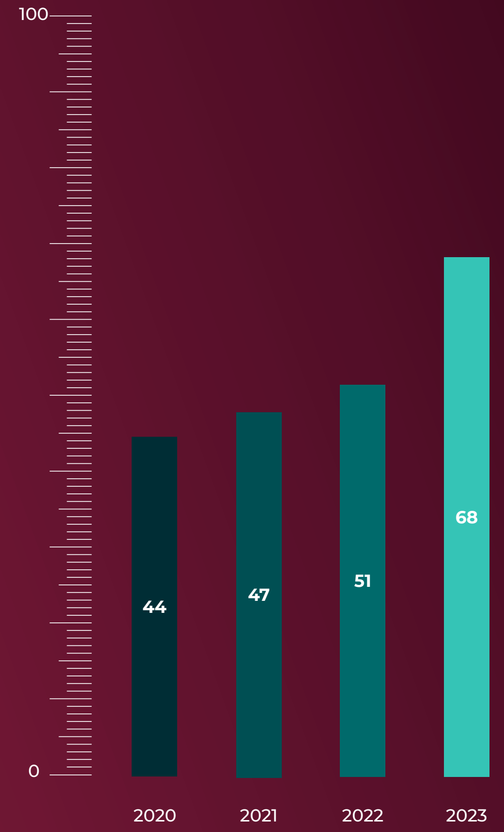
The broadest group of podcast users has grown in the past 5 years, from 21 to 43 percent. The upturn in reach is accompanied by growth in demand, as is reflected in the structure of offers.
Streaming services such as Spotify no longer have only music in their portfolio but are also investing in podcasts, such as through exclusive contracts with celebrities or leading podcasters.
Although the average duration of usage, as calculated based on the entirety including non-listeners, remains low at an average of 6 minutes, there is a steep rise in users' dwell times. At 68 minutes, the average listening time per day of use per person is significantly higher than in the previous year, which at the time was the high mark of 51 minutes. This represents an increase of more than 33 percent within just a year's time. Consequently, the intensity of usage is growing at an even higher rate than the reach of podcasts, which is an indication that podcast users are making increasingly extensive use of these offers.
Still, the increasing reach of podcasts and the length of time spent consuming their programming are not necessarily reflective of more frequent use. The increase in reach is spread relatively evenly across the different frequency categories. This means that podcasts are listened to by more people – not more often than before but for longer periods of time.

USERS SPEND CONSIDERABLY MORE TIME LISTENING TO PODCASTS THAN IN THE PREVIOUS YEAR

Usage share podcast over time
Figures in percent



Ø Dwell time podcasts over time*
Figures in minutes



* Duration of usage per person a day of use
Basis: Adults ages 14-69, n=approx. 1,200 per wave
Source: Media Activity Guide 2023, forsa

PODCASTS

The dwell time of podcasts
is growing dynamically

CONCLUSION

Despite losses, radio remains the audio medium with the greatest reach and the longest duration of use. Internet usage is stagnant, while usage of classic radio is decreasing.

Music streaming has reached the masses but cannot grow further at this point in time.

Podcasts are continuously gaining in reach; a listener's duration of usage per usage day is at a record high of more than one hour.

4 ONLINE USAGE

Almost all Germans (95%) now use the Internet, whether to read articles and blogs, for online banking, for social networks or for many other areas of daily life. Online usage is holding steady at a high level, sometimes revealing pronounced differences across age groups, especially where social media are concerned.

Reading of articles accounts for one-third of internet usage

Avg. daily duration of usage online activities
Figures in minutes, shares in percent

Basis: Adults age 14-69, n=1,222
Source: ViewTime Report 2023, forsa

CONTINUED SLIGHT DECLINE IN ONLINE ACTIVITY

Beginning this year, the study includes more static online activities (formerly content-based Internet) such as the reading of articles and posts as well as blogs and forums, online navigation, eLearning, online shopping and online banking, but not streaming or communication (for an exact definition, see page 86). As social-media offers are increasingly being used for videos and purely static content is losing importance, in future they will no longer be counted as online activities but will be shown separately instead, with their video shares taken into account in video usage (see Section 2).
Germans use Internet content for an average of 52 minutes a day. While this represents another slight drop in duration of usage since the high mark seen after the outbreak of COVID-19 (2021: 57 minutes; 2022: 54 minutes), it is still significantly higher than before the pandemic. Depending on the target group, online activities account for between 4 and 9 percent of daily media usage. This share rises to more than 9 percent in the target group of 30- to 39-year-olds and then drops back to less than 4 percent among those more than 70 years of age.

USAGE DURATIONS NORMALIZING FURTHER

Different trends are discernible in the individual categories of online usage. Thus, the level of online navigation or surfing in blogs and forums is holding largely steady. On the other hand, the category of 'Reading articles/posts'

People are reading fewer posts online

Avg. daily duration of usage online activities
Figures in minutes

Basis: Adults ages 14-69, n=approx. 1,200 per wave
Source: ViewTime Report 2023, forsa

has lost in share following the serious events that occurred during data collection in previous years: the outbreak of the Ukraine war in March 2022 and the COVID-19 pandemic in 2020 and 2021. Data on duration of usage clearly reflected an increased need for information in crisis situations. All in all, about half of the time spent on online activities is accounted for by the two editorial categories of 'reading articles' and 'blogs and forums'.
eLearning is growing slightly to more than 7 minutes and even after the pandemic is substantially higher than in 2019 (4 minutes). Schools and universities have returned almost entirely to in-person instruction; for many, however, online learning has become a habit.
The very high inflation rates seen in spring 2023 also have an impact on Germans' online shopping behaviour. Compared to the previous year, the duration of usage has fallen to just under 5 minutes. Online navigation, on the other hand, is nearly at the strong level of the previous year. The increasing popularity of navigation apps is explained not only by the return to normal mobility following the coronavirus crisis but also by the fact that the search for routes from A to B is becoming increasingly simplified.

STABLE REACH OF SOCIAL MEDIA

Social networks such as Facebook, Instagram and TikTok have become an indispensable part of the lives of most Germans. 62 percent of 14- to 69-year-olds use social media, 45 percent of them daily. The broadest group of users in the young target group stands at 90 percent. This high level of usage has held steady for years.
The trend in reach and duration of usage of the individual offers, on the other hand, is very wide-ranging and dynamic; these statistics are also very much a function of the respondents' age. Levels of Facebook and Instagram usage are increasingly converging in the overall target group of 14- to 69-year-olds, for example. With 38 percent reach, Instagram now trails Facebook by just 2 percentage points; Facebook has more users reporting usage ranging from weekly to rare, while Instagram, with 26 percent daily reach, has substantially more regular users than Facebook (21%). TikTok also enjoys a high and increasing share of daily users.
Instagram is dominant among the young target group, with a reach of 72 percent. At 56 percent, daily reach alone exceeds the total reach of all other social media offers. Snapchat, which is primarily used as a messenger, is the second-strongest social-media channel among those under the age of 30, with a broadest user base of 44 percent. TikTok now reaches 37 percent of the young target group, around three-quarters of these even (almost) daily. Facebook shares fourth place with Twitch. Only 33 percent of the young target group still make use of what was once the leading social network.

INSTAGRAM AND TIKTOK GAIN REACH

In the overall target group, Facebook has lost just 5 percentage points of reach since 2015 and is thus still holding relatively steady. Instagram managed to grow to a new high of 38 percent in 2023. The successful video platform TikTok, which primarily plays user-generated short clips, continues to grow and with 18 percent reach rank 3rd in the overall target group. Snapchat is stagnant at around 14 percent and thus plays a rather subordinate role.
Facebook is steadily and steeply losing its user base among those younger than 30 years of age. Instagram is levelling off at fully 70 percent following the peak seen in late 2020. Snapchat is slowly but steadily gaining and currently reaches 44 percent of 14- to 29-year-olds. TikTok has grown very quickly in this target group in particular and now has the broadest user base of 37 percent. The curve has been flattening for the past year, however. The platform, which is also polarising among young people, has begun showing the first signs of saturation.

SOCIAL MEDIA IS INCREASINGLY VIDEO

The trend in the duration of usage of social networks can be seen in the decline of Facebook, which (still) boasts relatively solid reach but is clearly losing in terms of duration of usage and has long since been overtaken by Instagram, which currently stands at 12 minutes.

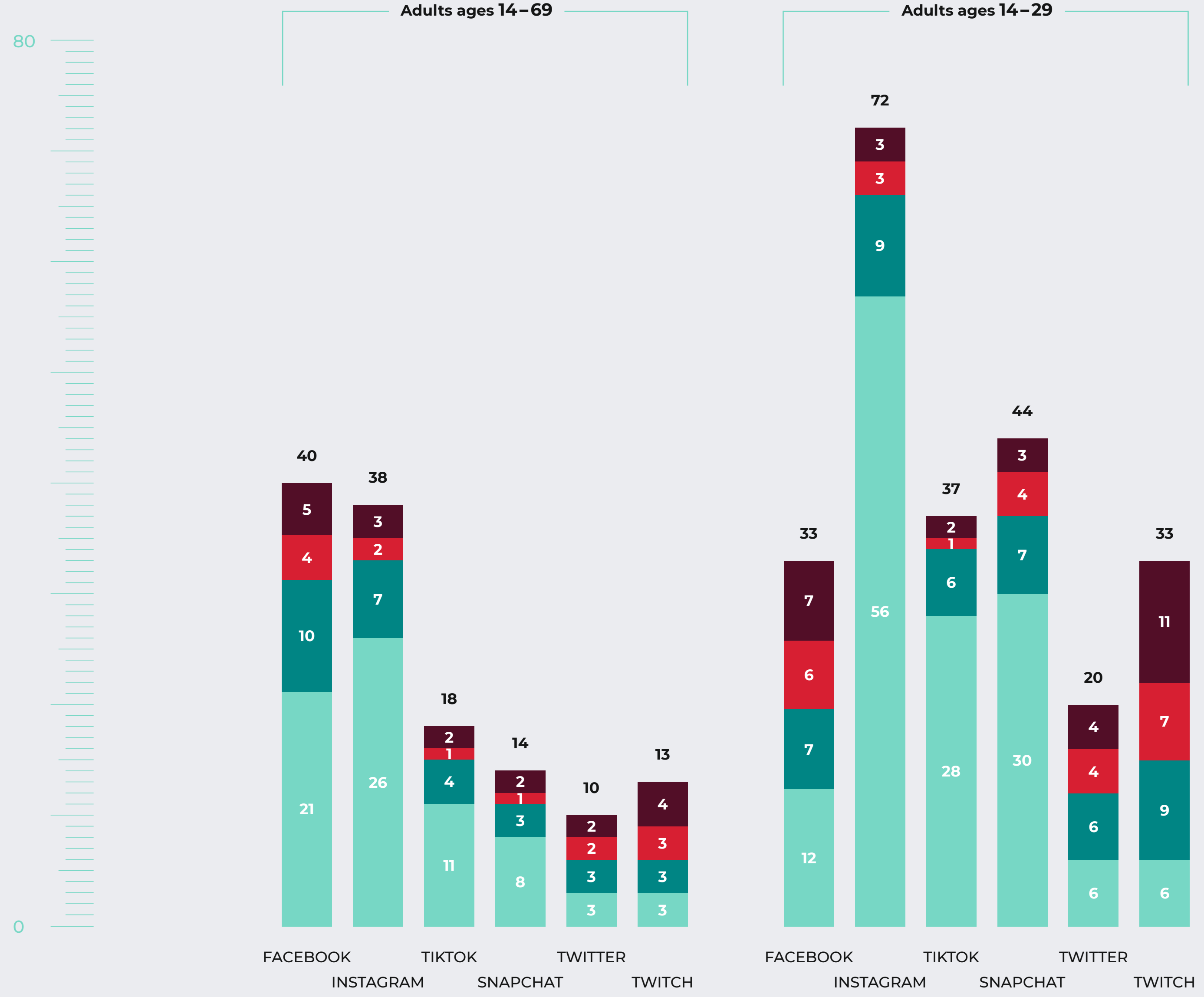
SOCIAL MEDIA

More than half of social-media usage is now video.

Instagram dominant among the young target group

Frequency of usage social media by provider (rolling)
Figures in percentages

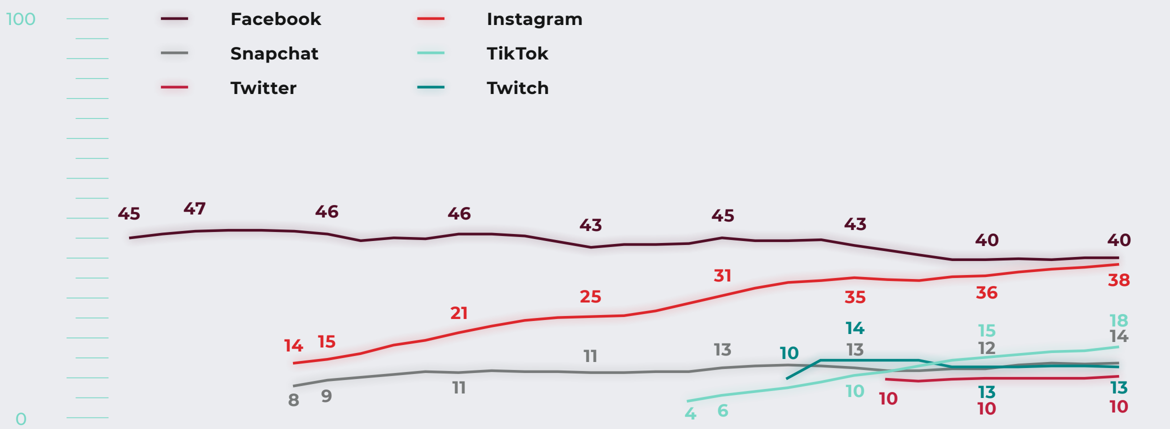
- less frequently
- at least monthly
- at least weekly
- (almost) daily



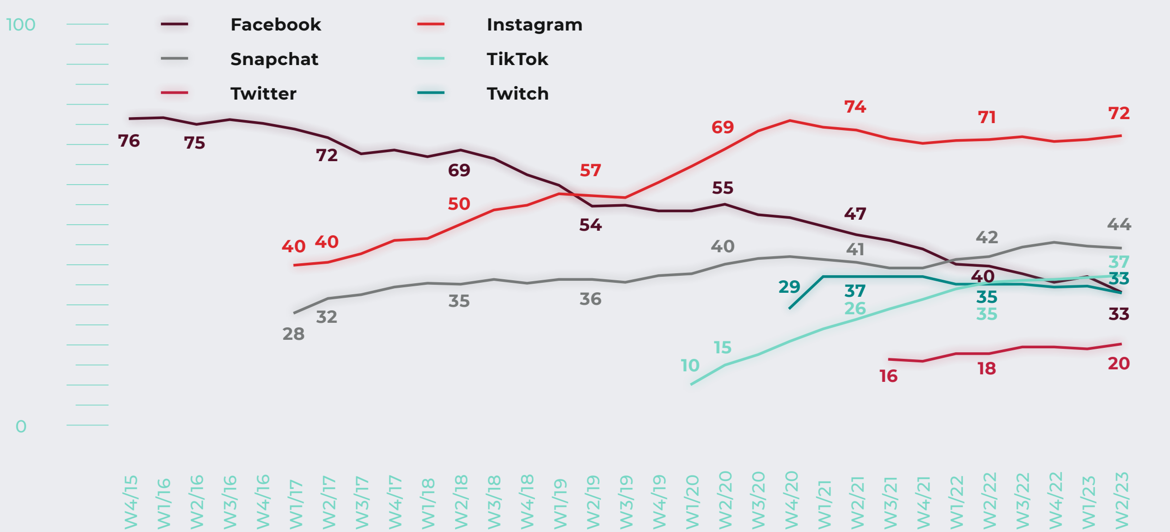
Basis: Adults ages 14-69, n=6,124/ n=1,457
Source: ViewTime Report 2023, forsa

SOCIAL MEDIA USAGE IS STRONGLY AGE-DEPENDENT

Usage of social media offers | Figures in percent, at least rarely, adults ages 14-69



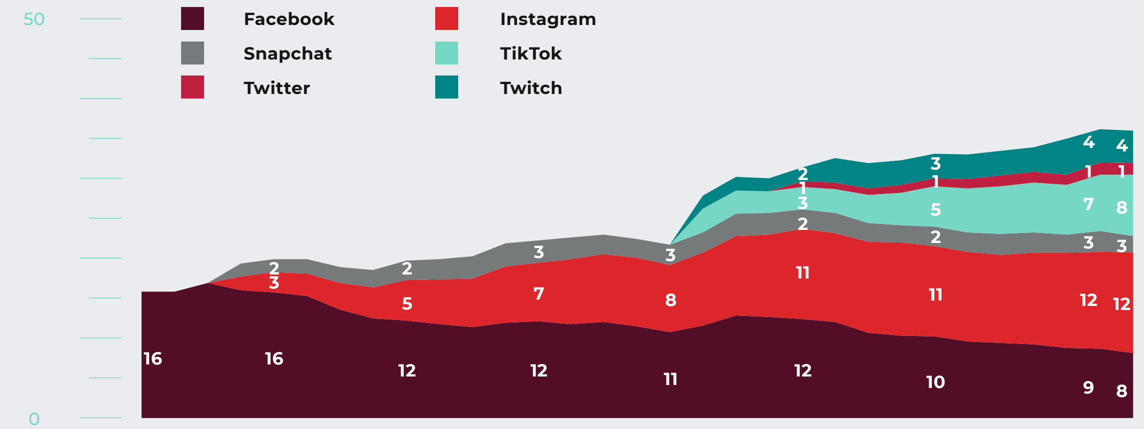
Usage of social media offers | Figures in percent, at least rarely, adults ages 14-29



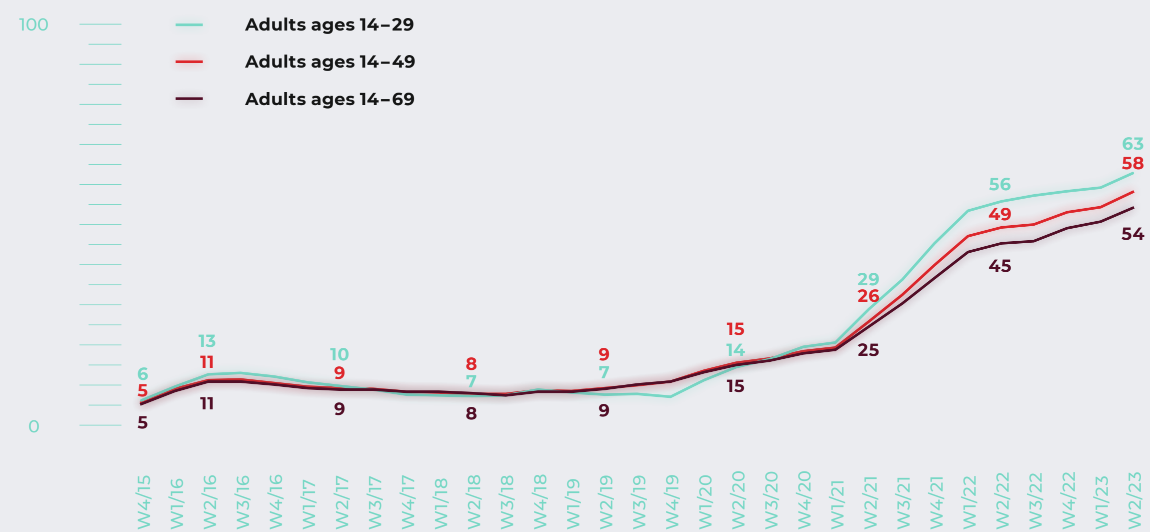
Basis: Adults age 14-69, n=52,913
Source: ViewTime Report 2023, forsa

VIDEO CONTENT DRIVES SOCIAL MEDIA USAGE

Avg. daily duration of usage social media offers (rolling) | Figures in minutes



Video share of social media usage (rolling) | Figures in percent

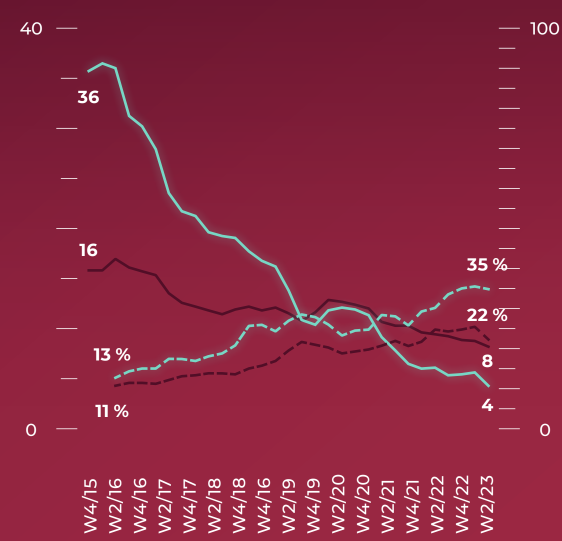


Basis: Adults age 14-69, n=52,913
Source: ViewTime Report 2023, forsa

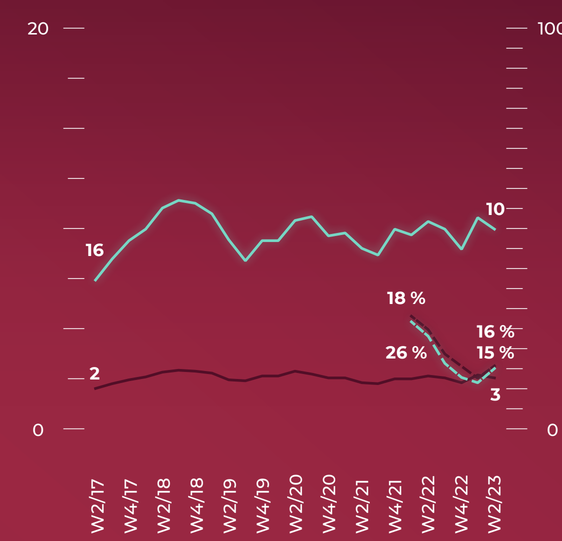
FACEBOOK LOSING RELEVANCE, INSTAGRAM STAGNANT, TIKTOK GAINING

Avg. daily duration of usage
Figures in minutes, video share in %

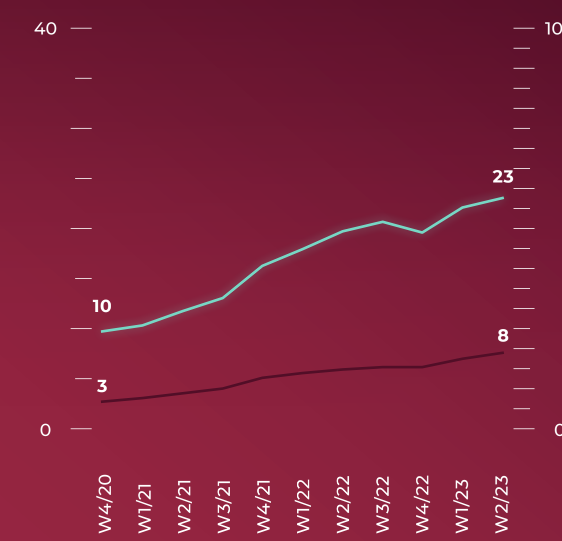
Duration of usage **FACEBOOK**



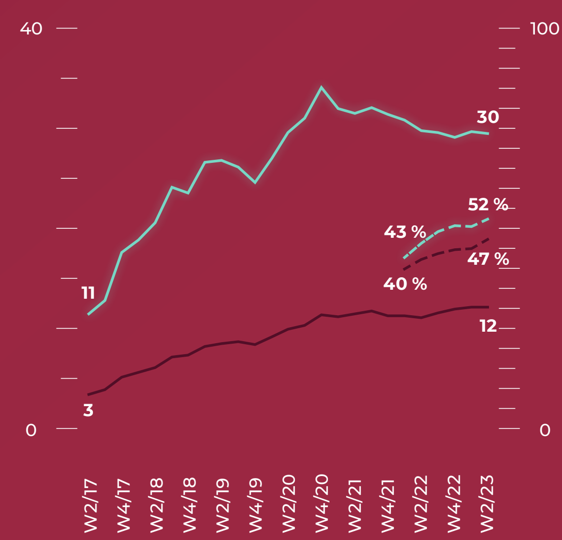
Duration of usage **SNAPCHAT**



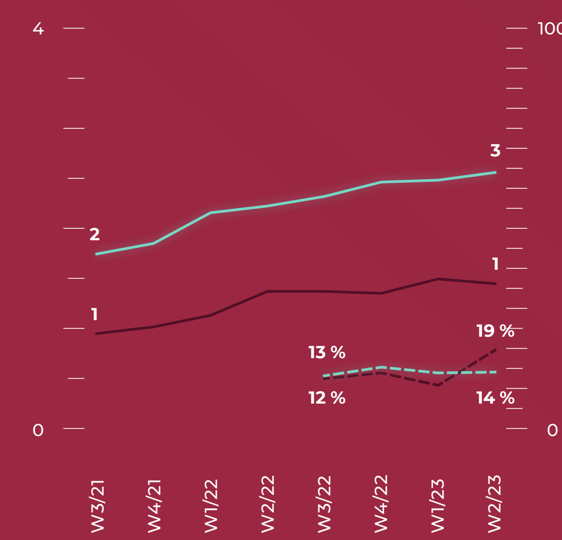
Duration of usage **TIKTOK**



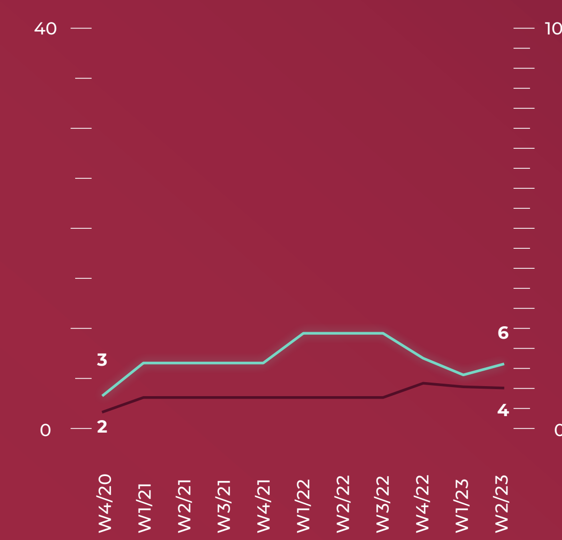
Duration of usage **INSTAGRAM**



Duration of usage **TWITTER**



Duration of usage **TWITCH**



- Duration of usage adults ages 14-29
- Video share adults ages 14-29
- Duration of usage adults ages 14-69
- Video share adults ages 14-69

FACEBOOK/INSTAGRAM
Basis: Adults ages 14-69, n=52,913/ n=43,049
Source: ViewTime Report 2023, forsa

SNAPCHAT/TWITTER
Basis: Adults ages 14-69, n=43,049/ n=17,178
Source: ViewTime Report 2023, forsa

TIKTOK/TWITCH
Basis: Adults age 14-69, n=22,103
Source: ViewTime Report 2023, forsa

The only social medium with an increasing duration of usage is TikTok, which, at 8 minutes, is already on a par with Facebook. Snapchat (3 minutes), Twitch (4 minutes) and Twitter (1 minute) are holding steady.
In terms of the content used on social media, the trend is clearly in the direction of video. The share of video usage has experienced strong growth since 2021. Many social networks have been trying to play more and more video for quite some time. Long-format videos have been uploaded and viewed on both Facebook and Twitter for many years. Instagram, Snapchat and, not least, TikTok use short clips that play in an almost endless stream by means of a recommendation algorithm. Nearly all social media have integrated this form of content into their user experience in different ways – such as Reels on Instagram, Spotlight on Snapchat or, more generally, videos on TikTok. YouTube also focuses on this trend with its YouTube Shorts.
This trend is also reflected in the significantly growing share of video-content usage on social media, which just a few years ago was negligible and has now reached more than 50 percent across all age groups and even exceeds 60 percent in the young target group.

CONCLUSION

Online activities are holding largely steady at 52 minutes of daily usage. Slight declines can be seen in online shopping and the reading of posts.

Usage of social media is also holding steady at a high level. Instagram achieves the highest duration of usage and is the dominant offer, particularly among the young target group.

Social media are increasingly evolving into video channels. More than 50 percent of the duration of usage now consists of video content, and the trend is continuing to rise.

5 PRINT usage

The losses among the print media seem to be never-ending. Since the massive downturn in the reach of newspapers and magazines between 2017 and 2019, the negative trend in reach and duration of usage is slowly yet steadily continuing. Digital forms of publication are not in a position to stop this trend. Their duration of usage is stagnant and gaining in shares only because overall usage is declining.

DECLINING REACH ACROSS ALL PRINT MEDIA

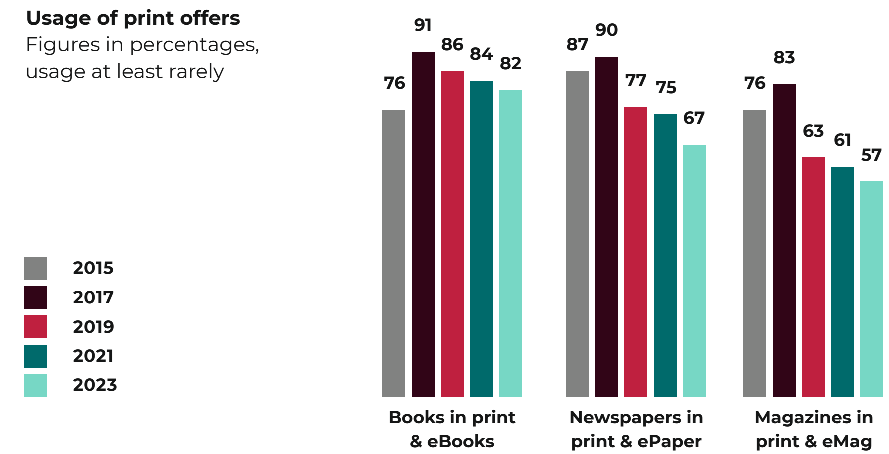
82 percent of the total target group read books, at least rarely. Reach has been decreasing for years but remains the highest in the print segment. Newspaper and magazine readership continues its downward trend: The number of readers of both print media dropped steeply, especially between 2017 and 2019, and has continued to shrink ever since. The broadest group of users of printed or electronic newspapers currently stands at 67 percent; this represents the steepest decline since 2019. As products in print or online, magazines are still read by 57 percent; 6 years ago, the reach was significantly higher, at 83 percent. In terms of duration of usage, books are relatively precisely at the previous year's level of 27 minutes. With a total of 11 minutes, newspapers are read even less than last year (14 minutes). The already very short duration of usage of magazines has fallen further, from 5 to 4 minutes.

DIGITAL VARIATIONS ONLY RELEVANT IN THE BOOK MARKET

ePapers and eMags with low durations of usage remain a niche phenomenon, but the use of digital books is considerably more widespread. As an analysis by age group shows, this is mainly the result of a high relevance among the young target group.

FURTHER LOSSES OF REACH ACROSS ALL PRINT GENRES

Usage of print offers
Figures in percentages, usage at least rarely



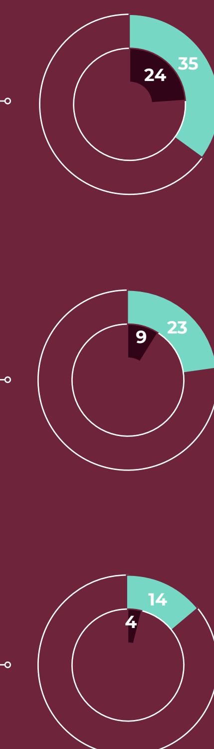
Basis: Adults ages 14-69, n=approx. 1,200 per wave
Source: Media Activity Guide 2023, forsa

SLIGHT LOSS OF REACH FOR ALL PRINT MEDIA

Avg. daily usage time of print offers
Figures in minutes

Basis: Adults ages 14-69, n=approx. 1,200 per wave
Source: Media Activity Guide 2023, forsa

Share electronic usage 2018 and 2023
Figures in percent



Among 14- to 29-year-olds, electronic variations account for nearly 55 percent of the time spent reading books. This trend was likely reinforced by increased use of digital learning media and textbooks in schools and universities, which was also driven by the coronavirus pandemic.

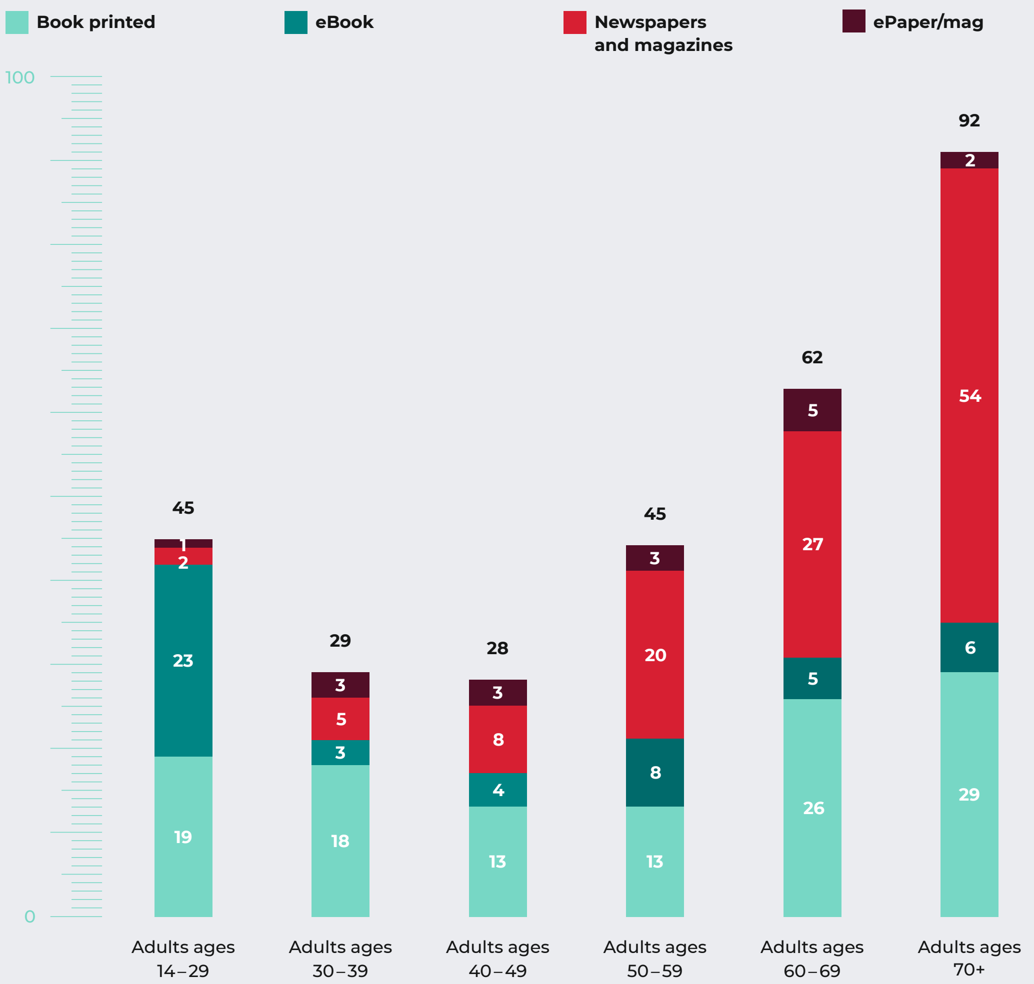
In the middle age segment of 30- to 49-year-olds, no other print medium plays a particularly important role apart from the printed book. Print media, especially newspapers and magazines, remain relevant for older people over the age of 50, however. For people aged 60 and older, print occupies third place with a long duration of usage, after TV and radio.

Publishers should no doubt be alarmed at the extremely old readership structure, and the associated low relevance of magazines and newspapers among young people. With this in mind, they are increasing their efforts to relocate their business to the Internet by offering discounted digital-subscription models. But the duration of usage devoted to the 'Reading posts' category has also decreased significantly in the context of Internet usage (15 minutes compared to 20 minutes in the previous year; see Section 4: Online usage).

Whether paid editorial content from established publishers will prevail over ad-financed aggregators of various news websites remains to be seen. If the growing target groups continue to retrieve information and news mainly through free digital channels, the problems of the genre are likely to grow even more serious.

DIGITAL BOOKS POPULAR, PARTICULALRY AMONG THE YOUNG TARGET GROUP

Avg. daily duration of usage by target groups
Figures in minutes



Basis: Adults ages 14+, n=1,501
Source: Media Activity Guide 2023, forsa

CONCLUSION

At 82 percent, books have the largest reach in the print segment; this is followed by newspapers, with 67 percent, and magazines, with 57 percent.

The reach of books and magazines is slowly but steadily declining, and that of newspapers is actually dropping sharply. The duration of usage of newspapers and magazines is also continuing to drop.

Particularly among young target groups, books are read increasingly in digital form. Digitalised forms of magazines and newspapers continue to stagnate at a very low level.

6 TYPES OF VIDEO USAGE

The previous analyses depict the individual media and their usage but not the ways in which different media interact from an individual user’s point of view. We enlisted statistical methods of cluster analysis to analyse video usage in 2022 across all media. This allowed us to identify 7 different types of video users.

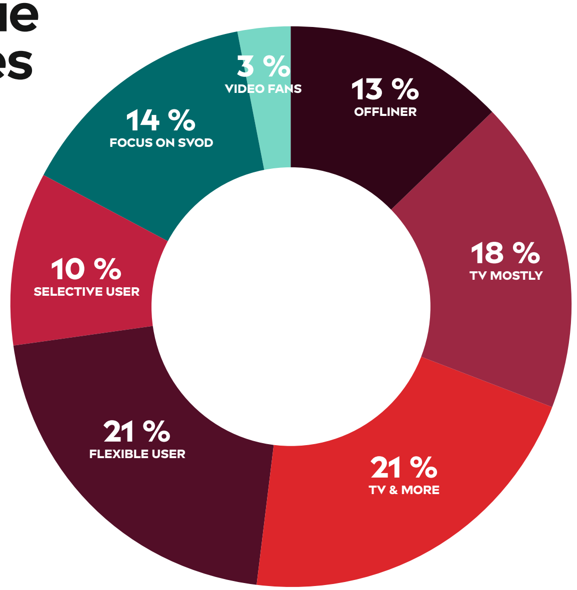
SEVEN TYPES OF VIDEO USERS

A typology of the total population aged 14 and over based on the leading characteristics of video and social-media usage leads to identification of a total of seven different types of video users. Three of these are older and watch a lot of TV. They differ from one another mainly in terms of their open-mindedness towards digital offers. While some do not use these at all and others are extremely selective, a third type already compensates for somewhat lower television usage with a certain set of 'new media', including BVoD. It is striking to note that not only older people fall into these three types, but that younger age groups are represented there as well.
The three younger clusters are characterised by a very high digital affinity with different areas of emphasis. Two of these groups also still watch a lot of TV. Of particular interest is the cluster of flexible users that exists exactly mid-way between the older and younger respondents. This target group assembles its overall rather moderate video usage from a variety of offers. The clear area of focus is on classic television.

OFFLINERS: OLDER PEOPLE WHO ARE ONLY FAMILIAR WITH TV

The first cluster consists of typical seniors who have not experienced digital socialisation. A minority of these are still in the workforce, but most of them have already retired. Two-thirds live in a single-person household, and only around one-quarter with a partner. More than 30 percent are already widowed.

DISTRIBUTION OF THE seven USAGE TYPES



Basis: Adults ages 14+, n=6,022
Source: ViewTime Report 2023, forsa

Typ 1: Offliner

- Older target group (avg. more than 60 years old)
- High proportion of pensioners, only a small portion still working
- Very high proportion of one-person households
- Very high usage of video (6 hours) consisting exclusively of classic television
- Online videos and social media play no role

Typ 2: TV mostly

- Older target group (avg. more than 60 years old)
- Around retirement (many still working, many already retired)
- High share with partner in household
- Very high usage of video (5.5 hours) consisting largely of classic television
- Online videos and social media are used with caution

Typ 3: TV & more

- Middle-aged
- High proportion of employed people
- High share with partner in household
- 5 hours of video usage with a very high share of TV
- But also interest in free online videos (BVoD and YouTube)
- Moderate usage of social media
- No interest in SVoD

Typ 4: Flexible User

- Middle-aged
- Very many employed people
- Very high share with partner in household
- Moderate video usage (3.5 hours)
- Use of various channels with a clear focus on classic TV
- But paid, free online videos and social media are also used very regularly

Typ 5: Selective User

- Younger target group, majority male
- Mostly employed or pupil/student/trainee
- Below-average share with partner in household
- No TV in the household, practically no TV usage
- Relatively low overall usage of video content (less than 2 hours)
- A large share of this is YouTube

Typ 6: Focus on SVoD

- Younger target group
- Mostly employed or pupil/student/trainee
- Very many with partner in household
- Medium level of video usage (4.5 hours)
- Usage of various channels, including linear TV
- Focus on SVoD with approx. 2 hours per day (much of this Netflix)
- YouTube and social media also in demand

Typ 7: Video fans

- Very small group (3%)
- Younger target group, rather male
- Very high proportion of pupils/students/trainees, above-average number of unemployed
- Relatively few with partner in household
- Extremely high video usage (more than 500 minutes)
- All channels represented, including TV
- Highest share attributable to YouTube (more than 3 hours)

CHARACTERISTICS OF VIDEO-USAGE TYPES IN COMPARISON

	Offliner	TV mostly	TV & more	Flexible User	Selective User	Focus on SVoD	Video fans
Cluster size	13 %	18 %	21 %	21 %	10 %	14 %	3 %
Avg. age	69	64	56	42	33	30	32
Share men/women	45 %/55 %	47 %/53 %	45 %/55 %	48 %/52 %	66 %/34 %	49 %/51 %	65 %/35 %
Share of employed people	22 %	40 %	61 %	81 %	63 %	65 %	46 %
Share of pupils/students/trainees	1 %	1 %	2 %	7 %	20 %	24 %	29 %
Share no occupation, unemployed	10 %	5 %	4 %	4 %	12 %	6 %	20 %
Share with partner in household	28 %	50 %	62 %	65 %	24 %	39 %	26 %
Share, 1-person household	67 %	46 %	29 %	16 %	45 %	20 %	34 %
Usage TV set	Yes	Yes	Yes	Yes	Very rarely	Yes	Yes
Internet usage	4 %	100 %	100 %	100 %	100 %	100 %	100 %
Video overall	366 min	333 min	306 min	214 min	106 min	303 min	506 min
TV at least weekly	91 %	94 %	96 %	80 %	25 %	56 %	42 %
Free online videos at least weekly	1 %	12 %	58 %	74 %	87 %	87 %	95 %
Paid online videos at least weekly	0 %	1 %	8 %	72 %	72 %	98 %	56 %
Social media at least weekly	1 %	17 %	34 %	69 %	60 %	88 %	60 %
YouTube at least rarely	1 %	41 %	86 %	94 %	98 %	97 %	100 %

Basis: Adults ages 14+, n=6,022
Source: ViewTime Report 2023, forsa

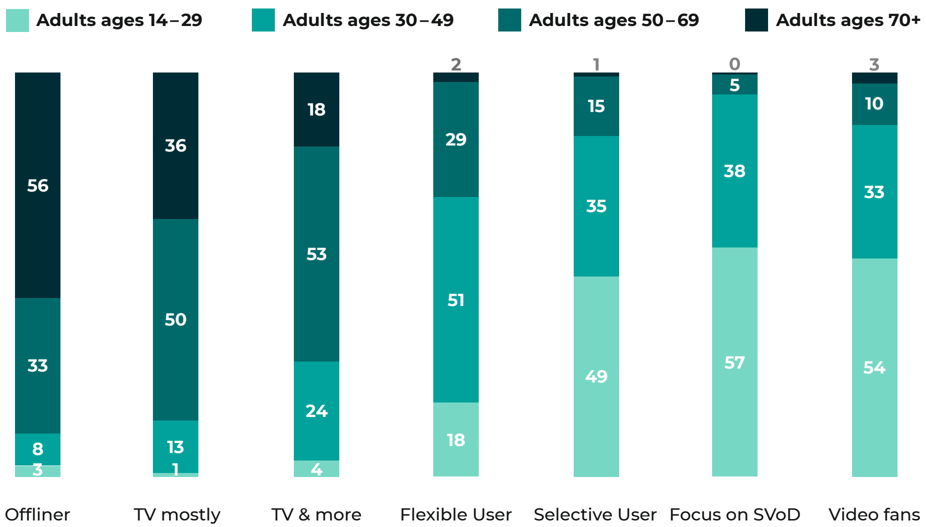
13 percent of the total population 14 years of age and older are described by this type.
At a total of 6 hours per day, they are the cluster reporting the second-highest video usage, consisting exclusively of television. Other media play no role for this group, and just 4 percent of these individuals have access to the Internet at all. Presumably, these are people who also switch the TV on so as not to feel lonely and to create a sense of company.

TV MOSTLY: SENIORS WITH FIRST DIGITAL EXPERIENCE

The second cluster is very similar to the first, but only at first glance. This target group is slightly younger, at around retirement age. Some of them have already retired, while others are still in the workforce. The proportion of people living alone in this group is also lower; half live in a household with a partner. This cluster represents around 18 percent of the population.
At more than 5 hours a day, this type also uses a lot of video, particularly TV. In contrast to type 1, however, this cluster is characterised by a certain open-mindedness to digital media, even if usage shares are still very small. They all use the Internet in some form (even if just for e-mails), in some cases they are users of social media and gain initial experience with free online videos. More than 40 percent of them use YouTube at least rarely.
SVoD offers such as Netflix do not play a role for this target group. These are apparently the typical grandparents who keep in touch with their grandchildren via messenger services and occasionally also watch YouTube videos that they send them.

THREE RATHER OLDER AND THREE VERY YOUNG CLUSTERS

Age structure of the types | Figures in percent



Basis: Adults ages 14+, n=6,022, entire year 2022
Source: ViewTime Report 2023, forsa

TV & MORE: TV USERS BY CONVICTION

A strong cohort at 21 percent and with an average age of 56, this type is younger than the first two clusters. The vast majority of them are employed and live with a partner. Around one-third of them still have (presumably not very small) children living in the household. At around 5 hours, daily video usage by this target group is only slightly above average. The largest share of usage for them, too, is attributable to normal television – although they are already familiar with digital offerings. They use both free and paid online videos as well as social media at least occasionally, but have not yet entirely revamped their usage habits. Their high affinity for TV content can also be seen in their above-average use of BVoD, while SVoD services play only a very minor role.

FLEXIBLE USERS: DIFFERENTIATED USE WITH A TV FOCUS

At 21 percent, this group is also relatively large and is right in the middle of life: Its members are 42 years old on average and for the most part in the workforce. As a classic family cluster, the majority of them live with a partner, and usually with children in the household as well.

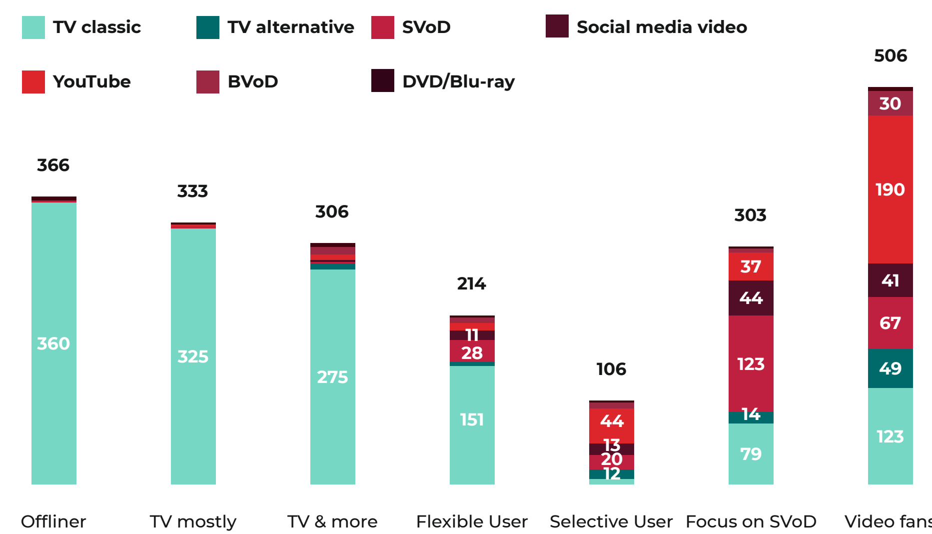
At 3.5 hours, their daily video usage is rather below average and the second-lowest value across all the types. With the demands of work and family, their days are already quite active, leaving little time for media entertainment.
Many members of this cluster belong to Generation X; born just before the millennials, they have grown up largely surrounded by classic, analogue media. In keeping with their socialisation, even today most of their video usage is still on television. At the same time, they are technically well-equipped and make regular use of various video-on-demand offers. They use these offers to very systematically supplement TV viewing and consume around half an hour of paid SVoD services each day.

SELECTIVE USERS: VIDEO ASCETICS WITH AN AFFINITY FOR YOUTUBE

10 percent of the population falls into this very young and mostly male cluster of selective users. Two-thirds of them are in the workforce, while anot-

FOUR TYPES ARE CHARACTERISED BY HIGH TV USAGE

Video usage by the types | Figures in minutes



Basis: Adults ages 14+, n=6,022
Source: ViewTime Report 2023, forsa; AGF video research in cooperation with GfK; VIDEOSCOPE 1.4, market standard: TV, own internal calculations

her 20 percent are pupils, students or apprentices. Many of them live alone in a household, and only one in four lives with a partner.
At just over 100 minutes, their daily video usage is strikingly low. Most do not have a TV in the household and use other devices to consume video content. This type scarcely watches TV, and if they do, it is through alternative routes. Usage of SVoD and social-media video is also relatively low, given the young age of the target group. Their representatives are most likely to spend around three-quarters of an hour a day on YouTube.

FOCUS ON SVOD: SMART USERS WHO RELY HEAVILY BUT NOT EXCLUSIVELY ON SVOD

This group comprises 14 percent of the total; at an average age of around 30, they are roughly as young as selective users, and this cohort features women as well as men. They are also predominantly employed or still in training/studies; unlike the previous group, however, they are less likely to live alone and more often in couple relationships.
At around 5 hours a day, their video usage is neither particularly high nor particularly low, but it is particularly versatile: There is no other cluster with such an even distribution of the different channels. Although the usage focus is on paid online videos at around 2 hours, and at more than 70 minutes Netflix usage is above-average, normal television still plays an important role for these people and accounts for around 1.5 hours of viewing a day. They also like to use videos on social media and YouTube.

VIDEO FANS: EXTENSIVE VIDEO USAGE ACROSS ALL CHANNELS

At 3 percent, this cluster is relatively small, but it is also very extreme: Its representatives are young and mostly male, and scarcely half of them are in the workforce. The other half is either still in school, university studies and apprenticeships or else unemployed. At least these people seem to have a lot of free time, as they use more than 500 minutes of video offers every day.
They are not particularly picky, either. They spend more than 3 hours on YouTube and just under 3 hours on TV. They also use SVoD offers as well as BVoD and videos on social media.

CONCLUSION

All but one of the seven types of video users watch TV, most of them mainly.

Video usage by the three older clusters consists almost exclusively of linear television.

The middle-aged type uses all video offers but mostly TV as well.

Among the younger clusters, there is one with very selective video usage, barely watching TV, and one that features excessive use of nearly all offers.

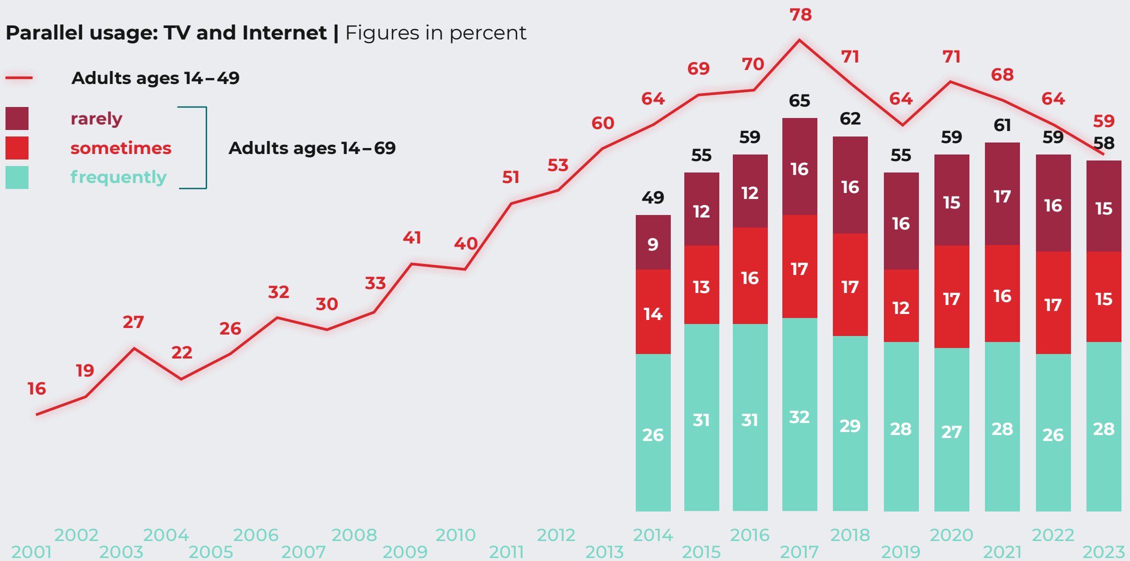
Another type also uses all channels with a focus on SVoD; television plays a relevant role here as well, however.

7 Parallel usage & incentive effect

Chatting, surfing or shopping online while watching TV has been established for many years. The increasing proliferation of mobile devices led to continuous growth in second-screen usage in the early 2000s. The share of parallel users has been declining slightly for about 6 years. Searching for information about TV programming and product-related research still rank among the most common activities.

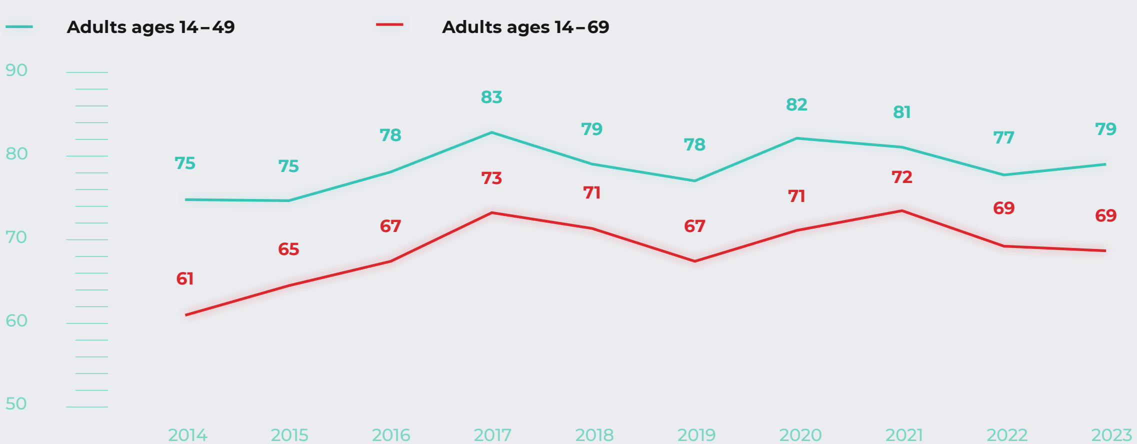
Parallel usage has passed its peak

Parallel usage: TV and Internet | Figures in percent



Basis: Adults ages 14-69, n=approx. 2,450 per wave
Source: Media Activity Guide 2023, forsa

Parallel usage: TV and Internet (basis: TV and Internet users) | Figures in percentages, usage at least rarely



Basis: Adults ages 14-69, n=approx. 2,450 per wave
Source: Media Activity Guide 2023, forsa

PARALLEL USAGE ESTABLISHED, BUT WITHOUT FURTHER GROWTH

Parallel usage rose sharply through 2017, driven mainly by the rapid spread of mobile devices. Since then, interest in simultaneous use of TV and the Internet has been high but has declined slightly. Currently, 58 percent of 14- to 69-year-olds use the Internet at least occasionally in parallel with television. Fully half of these even do so frequently.

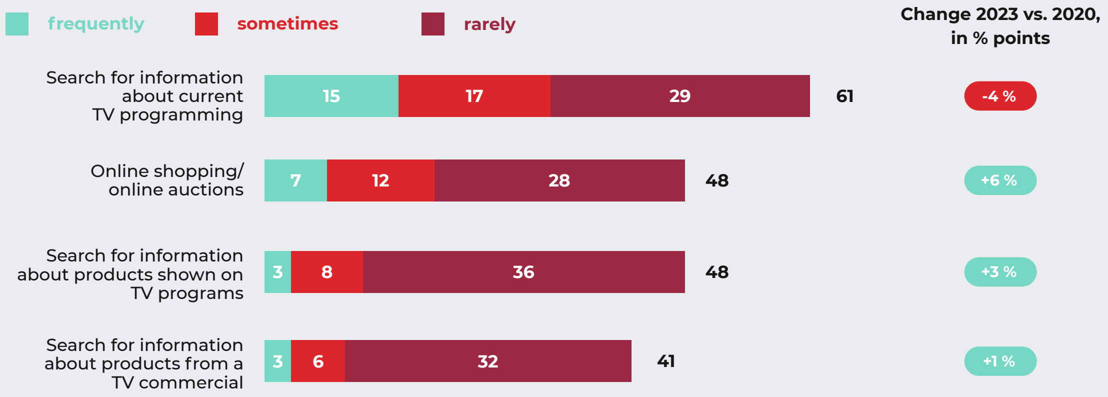
This downward trend in parallel usage is due, among other things, to the declining share of those who regularly use both TV and the Internet. But the decreasing reach of television, especially among younger target groups, is not the only reason for this development. Even considering only users of TV and the Internet as a base, it emerges that the tendency to use another device while watching TV increased until 2017 and has trended downwards since then. Parallel usage increased slightly for a brief time but only during the pandemic, likely due to an increased need for information. For around 2 years now, people have apparently sensed somewhat less of a need to use the Internet while watching TV.

Parallel usage is used most often to investigate information on TV programming (61%). Parallel online shopping is also still very much in demand (48%), following its peak level during the pandemic. The search for products shown on television is just as widespread. 41 percent investigate products shown in TV advertising. Through simultaneous use of the Internet, television can act as an incentive, motivating people to actively search for information or even buy a product.

Compared to other classic media, television is quite often the trigger for product research on the Internet. Fully one-half of respondents reports at least occasionally searching online for products previously seen on TV or on TV commercials. Journalistic posts and ads on search engines are at a slightly higher level, as here users can continue searching directly on the same device. Social media, on the other hand, which tend to promote a particularly authentic brand presentation for themselves and their influencers, have a significantly lower activation potential (40%); the same is the case for radio or print.

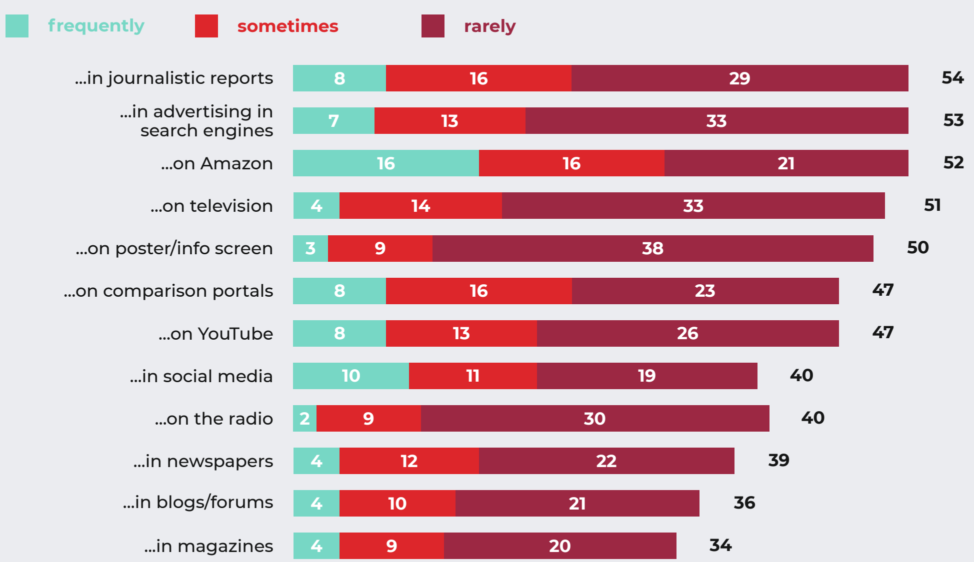
TV WITH HIGH INTERACTION POTENTIAL

Activities during parallel usage of TV and Internet | Figures in percent



Basis: Adults ages 14- 69, parallel users of TV and Internet, n=709, Source: Media Activity Guide 2023, forsa

Product research online after product was noticed,... | Figures in percent



Basis: Adults age 14-69, n=1,222, Source: Media Activity Guide 2023, forsa

CONCLUSION

Parallel usage is established at a high level but is currently losing some of its attractiveness.

Around half use the second screen for product research or online shopping.

TV has the highest incentive impact among the classic media.

DEFINITIONS

E-PAPER, E-MAG	from 2018 change in question wording
GAMES	digital online and offline games on all devices
ONLINE ACTIVITIES	online shopping, reading of articles/posts, blogs/forums, online navigation, eLearning, online banking
MOBILE DEVICES	smartphone and tablet
MUSIC	music streaming, CD, record albums, MP3s
MUSIC-CD	from 2021 incl. record albums
SVoD	paid video providers; from Q1/23 as the sum of the providers: Netflix, Amazon Prime, Disney+, WOW, DAZN
PC/LAPTOP	surveyed separately until Q4/19
RADIO	from 2019 incl. car radio
SOCIAL MEDIA	Facebook, Instagram from Q2/16 Snapchat from Q2/16 TikTok from Q2/19 Twitter from Q4/20 Twitch from Q1/21
TV	simultaneous and time-delayed
TV alternativ	alternatively broadcast TV programming on PC, laptop, tablets, smartphone or other devices via livestream or receiver stick
WEARABLES	smart watches, fitness bracelets

METHODOLOGICAL PROFILE

STUDY SEGMENTS	Media Activity Guide (MAG) ViewTime Report (VTR)
STATISTICAL POPULATION	German-speaking population 14 years of age and older, living in households with landlines or mobile phones in the Federal Republic of Germany
SURVEY FORM	telephone interviews (CATI), dual frame based on the recommendation by ADM [membership consisting of leading companies in market and social research] (70% landline, 30% mobile)
FREQUENCY	MAG: annual VTR: quarterly
FIELD TIME	MAG: 27 February -26 March 2023 VTR: Final 4 weeks of the quarter, always Monday through Sunday
NUMBER OF CASES	MAG: 3,003 (incl. VTR Q1/23) VTR: approx. 1,500 cases per quarter
REPORTS	MAG: Quarterly values Q1 VTR: Waves (rolling average over 4 quarters)
WEIGHTING	region, gender, age
IMPLEMENTATION	forsa. Gesellschaft für Sozialforschung und statistische Analysen mbH
TV USAGE	AGF Videoforschung in cooperation with GfK, VIDEOSCOPE 1.4, market standard: TV

Methodological note:
Totals and percentages may reflect minor deviations as a result of rounding.

IMPRINT

Publisher:
Seven.One Media GmbH, Unterföhring
October 2023

Management:
Guido Modenbach
Gerald Neumüller

Editor-in-Chief:
Johanna Teichmann

Authors:
Dr. Michael Adler, Justus Hagmann,
Johanna Teichmann

Marketing:
Anne Brück

Media enquiries:
Felicitas Giese

Art & Design:
Corporate & Sales Creation

Frequency of publication:
Once a year

Seven.One Media GmbH

Executive Board:
Thomas Wagner (Vorsitzender)
Lennart Harendza
Maximilian Klopsch
Guido Modenbach
Georg Nitzl
Güldag Prange

Seven.One Media GmbH
Medienallee 4
D-85774 Unterföhring
phone +49 (0) 89 95 07-40

www.Seven.One

A company of the
Seven.One Entertainment Group GmbH

Image sources | Cover: wacomka – stock.adobe.com | S. 02/03, S. 18/19, S. 38/39, S. 46/47, S. 62/63, S. 70/71, S. 80/81, S. 86/87: wacomka – stock.adobe.com | S. 05: Delcio F/peopleimages.com – stock.adobe.com | S. 08: Filip – stock.adobe.com | S. 12/13: Romana – stock.adobe.com | S. 16: Farknot Architect – stock.adobe.com | S. 24: ivanko80 – stock.adobe.com | S. 28: Yojak Vasa – stock.adobe.com | S. 31: Davide Angelini – stock.adobe.com | S. 34: Aditchii – stock.adobe.com | S. 41: Jordan C/peopleimages.com – stock.adobe.com | S. 42: Syda Productions – stock.adobe.com | S. 44: Gabriela – stock.adobe.com | S. 49: Jadon B/peopleimages.com – stock.adobe.com | S. 51: (JLco) Julia Amaral – stock.adobe.com | S. 53: Jacob Lund – stock.adobe.com | S. 54: Drazen – stock.adobe.com | S. 60: Rene L/peopleimages.com – stock.adobe.com | S. 64: Drobot Dean – stock.adobe.com

WIR
Bewegen
Marken
www.Seven.One