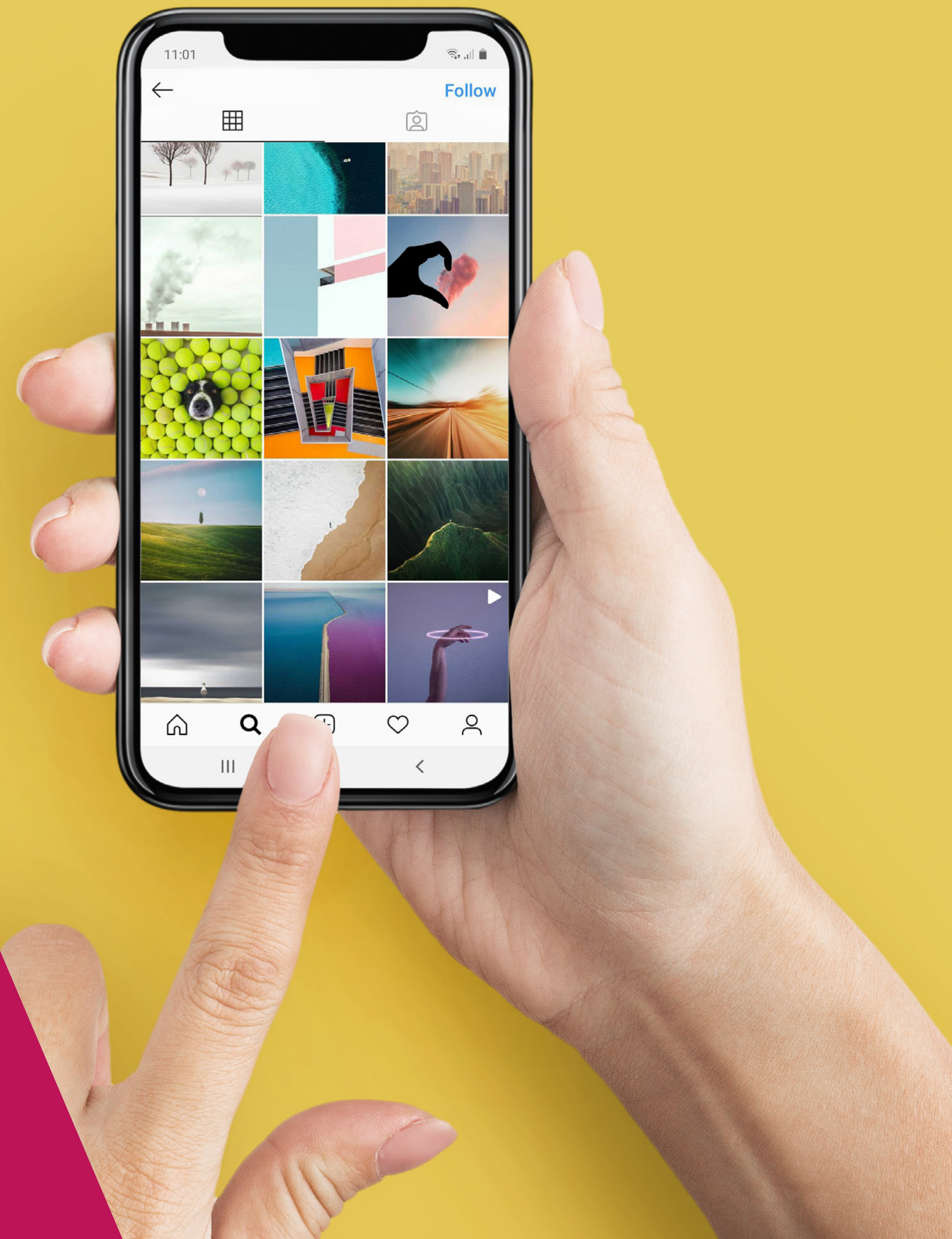
globalwebindex

# Social

GlobalWebIndex's flagship report on the latest trends in social media




**FLAGSHIP REPORT 2020**

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# What's inside?



# Introduction

GlobalWebIndex Social Media flagship report provides the most important insights on the world of social media, from the very latest figures for social media engagement to the key trends within the social space and a comprehensive view of which social platforms are most popular. Among others, this report covers the following topics in detail:

**01** How much time per day are digital consumers devoting to social media?

**02** How are the behaviors of social media users changing?

**03** How are consumers using social media to engage with brands?

## METHODOLOGY

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle East and Africa, and the Asia Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

# Key Insights

## 01

### Social saturation

Globally, **digital consumers are now spending an average of 2 hours and 24 minutes per day on social networks and messaging apps**. A look at the trended data here suggests that while social media consumption continues to creep upward, an increasing number of markets are at a critical saturation point. **Compared to the previous year, in 2019 time spent on social media has either decreased or stayed the same in 22 out of the 46 markets we survey**.

## 02

### Entertaining, not connecting

Entertainment now **ranks as the third-most important reason for using social media but showing the highest growth**. 16-24s are the most likely audience to list "finding funny or entertaining content" as a main reason they use social media, followed by using it to fill up spare time and to stay up-to-date with news and current events. To "keep in touch with friends" is consistently listed as a top reason for using social media across all age groups, but has gradually become a less powerful motivator for 16-24-year-olds.

## 03

### Facebook and YouTube dominate

Globally, **Facebook remains the dominant social platform by membership**. Outside of China, Facebook is the most owned account, with Youtube in a strong second place, followed by Facebook Messenger which has a decent lead ahead of services like WhatsApp, Instagram, and Twitter. **If we narrow our focus to people who have visited or used the service in the last month, YouTube rises to the top position**. We also see WhatsApp overtake Facebook Messenger for monthly visitation outside China.

## 04

### The value of TikTok

**Just under half (44%) of TikTok members outside of China fall into the 16-24 age bracket and 80% are either Gen Z or millennials**, and they want it to stay this way. TikTok app users are 1.8x as likely as the average internet user to want brands to be "young", as well as over-indexing for wanting brands to be "trendy/cool", "exclusive", and "bold". Aside from its youthful user base, it's a useful platform for marketers as it allows them to partner with platform influencers to create striking and highly entertaining content.

## 05

### Shared experience through gaming

In a custom survey run in the UK and U.S., we found that the third most common frustration with social media is the lack of actual human connection, and among males this is actually the top frustration. **Online games tend not to have this disadvantage as they can foster a more authentic connection through shared interest and skill. This has meant the line between gaming organizations and social networks has become increasingly blurred**. Cooperation and teamwork resonate as motivators for playing games online across all demographic breaks, but particularly for our youngest gamers (16-24s), who are an audience looking to diversify and deepen their online relationships.

01

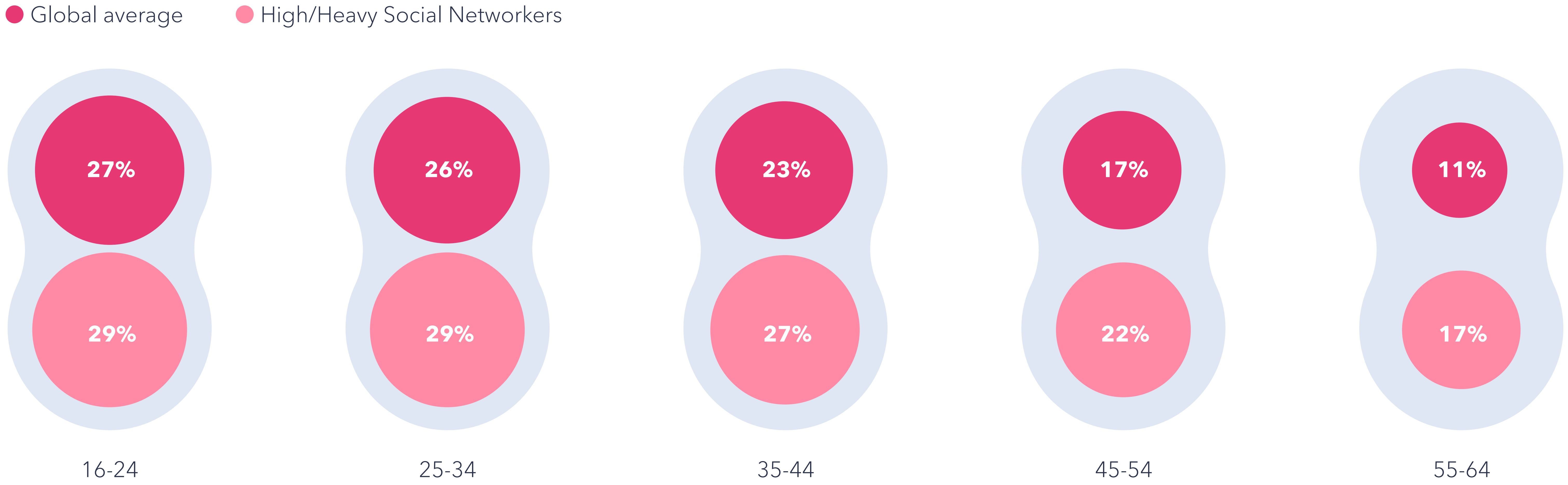
Social

# Social media engagement

# Social media and digital wellbeing

### SCREEN TIME TRACKING

% who say they have used their mobile to track their screen time or set limits for certain apps




**63% of global internet users say that they are constantly connected online, up from 56% in 2015**

The emergence of digital wellbeing tools, which focus on helping individuals create healthy attitudes and behaviors toward tech and social media around them, was a major industry trend for 2019. **Almost 1 in 4 of all global internet users have tracked their screen time or set limits for certain apps in the past month, rising highest among 16-34-year-olds**.

**At every age bracket, high/heavy users of social media – those who spend more than one hour per day on social platforms – are more likely to have used a digital wellbeing tool**. This finding is particularly prominent for our eldest consumers; the difference is greatest between social networkers in older age brackets and their global counterparts of the same age. **Among this audience of heavy social networkers, it's those in the Middle East and Africa who are most likely to exhibit this behavior, with 4 in 10 doing so**.

Tech giants are increasingly buying into the idea of offering products and services that promote digital wellbeing and offer greater user control over data and privacy settings. Facebook recently launched a new market research, task, and product testing program that lets users earn money. Called "Viewpoints", the new feature pays users for completing wellbeing surveys and other "tasks", essentially giving consumers a way to monetize their data (and level the playing field), while also providing the company with useful data.

**Question:** Which of these have you done on your mobile in the last month? (Tracked your screen time or set limits for certain apps)
**Source:** GlobalWebIndex Q2-Q3 2019
**Base:** 284,929 internet users aged 16-64

# Time spent on social media

**97% of digital consumers have used a social media network in the past month; being an internet user means being a social media user**

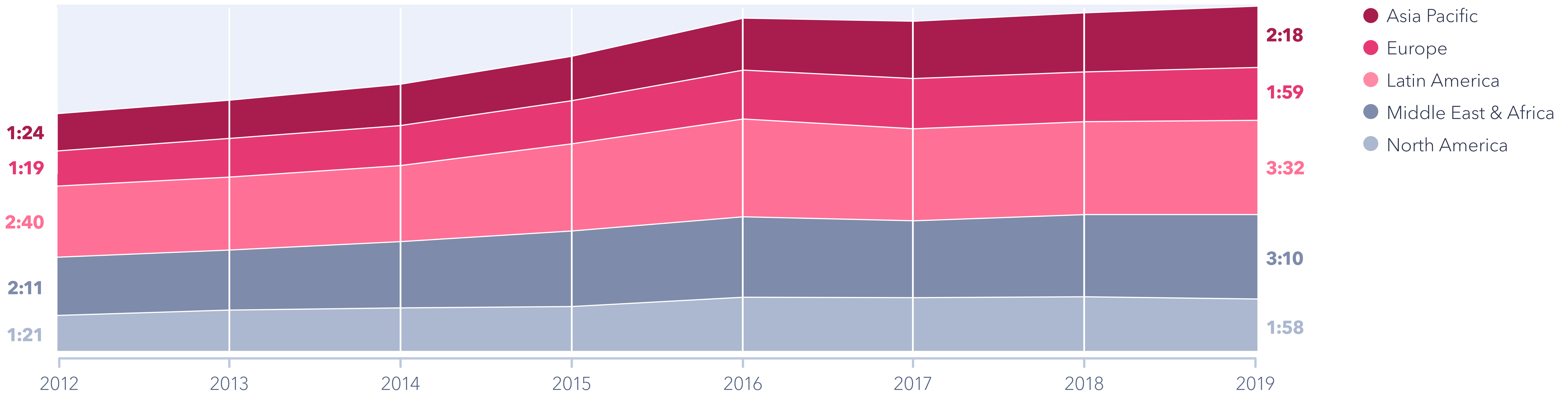
Globally, **digital consumers are now spending an average of 2 hours and 24 minutes per day on social networks and messaging apps**. A look at the trended data here suggests that while social media consumption continues to creep upward, an increasing number of markets are at a critical saturation point.

In 2018, we started to see time spent on social media plateau across a handful of countries – where time spent online has either stayed the same or decreased. Many internet users are now more aware of the time they spend looking at screens, and of the perceived negative effects associated with social media usage. As a result, many are wanting a digital detox. This trend will likely continue into 2020 as well. **In Q2 and Q3 2019, time spent on social media has decreased or stayed the same compared to 2018 data in 22 out of the 46 markets we survey.**

Across the globe, 16-24s are devoting the most time per day to social media – just under three hours, on average. The importance of messaging apps to this demographic is a key reason behind this, as is the centrality of smartphones to their digital lives. Additionally, it's important to note that this **consumption is simultaneous rather than sequential**; 7 in 10 of 16-24s say they use social media while they are watching TV.

**DAILY TIME SPENT ON SOCIAL MEDIA**

Average h:mm spent engaging with/connected to social networks/services during a typical day




**Question:** On an average day, how long do you spend on social media? **Source:** GlobalWebIndex 2012-2019 (averages of all waves conducted between Q2 2012 and Q3 2019) **Base:** 61,196 (2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), 424,326 (2019) internet users aged 16-64

# Time spent by market

Younger groups are the most enthusiastic about social media, and the internet populations of fast-growth markets tend to be younger than most mature markets. This provides clear context for why the topline figures for daily time spent on social media differs so significantly between countries, from a high of 4 hours in the Philippines, to much lower figures of just over an hour in markets such as Austria, Germany, Switzerland, and South Korea.

**If we examine the habits of 16-24s in isolation, we see many mature markets posting high numbers** – this age group in the UK, Spain, and Portugal spend over 3 hours on average on social media per day. **But the highest engagement in Europe among our youngest cohort is in Russia**, with 16-24s typically spending over 4 hours per day on social media. This is likely a result of their own unique ecosystem of social platforms – home-grown networks like VK and Odnoklassniki boast significantly higher figures in Russia than Facebook for monthly visitation. VK is particularly popular among 16-24s in Russia, and is the most visited platform monthly (94%), coming slightly ahead of YouTube (93%).

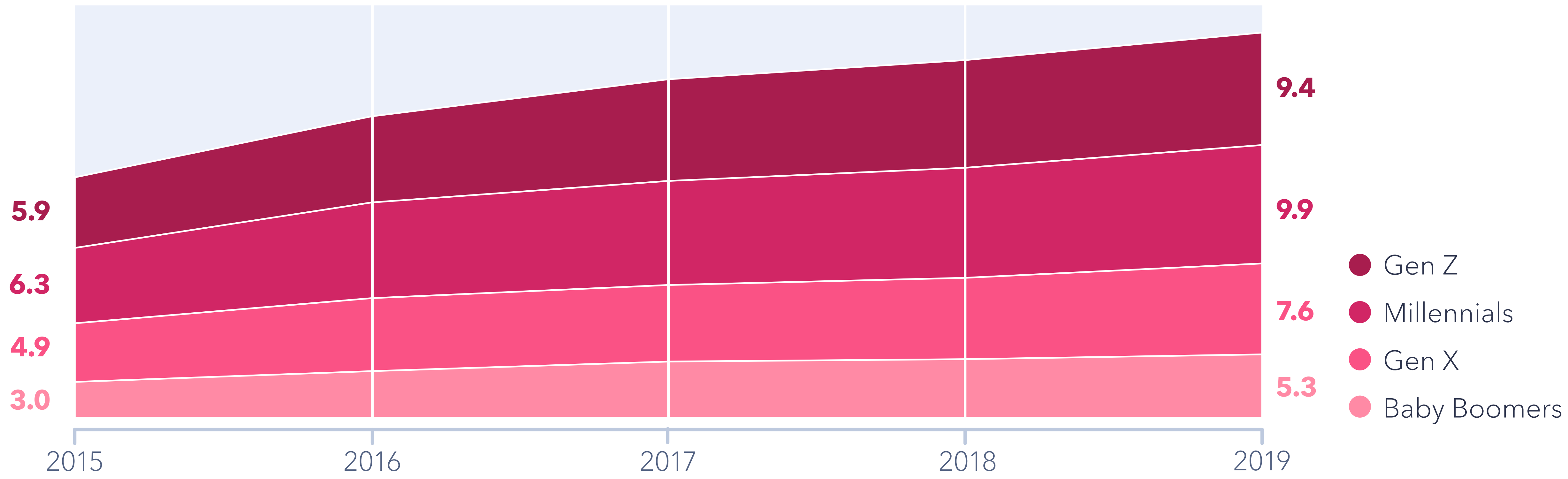
Social media consumption isn't down to age alone. **Even among 16-24s, certain markets (primarily in South-East Asia and Latin America) stand out for their consumption of social media**. In fact, all four Latin American markets that we survey – Colombia, Brazil, Argentina, and Mexico – feature prominently in the top six markets with the highest consumption among 16-24s.

# Social saturation

### MULTI-NETWORKING

Average number of social media accounts held by internet users

| | |
|---|---|
| APAC | 9.5 |
| Europe | 7.3 |
| LatAm | 9.4 |
| MEA | 7.8 |
| NorthAm | 6.8 |




Social media users are comfortable maintaining a presence across a number of platforms; while the average internet user had about 6.2 social media accounts in 2015, the figure has risen to nearly 8. **This multi-networking is a response to the widening choice of platforms, but it's also being caused by a degree of specialization**, where some users are turning to particular platforms to carry out certain types of networking behaviors such as Twitch, Pinterest, and TikTok.

While time spent on social media is plateauing, the average number of social media accounts per internet user continues to grow across all age groups. There are many factors that are influencing these findings, including the growth in internet usage among older consumers who have arrived late to the social media party, and the stagnation of user growth on certain key platforms. However, the most important trend to understand regarding this peak in multi-networking is the rise of younger, mobile-only internet users who focus their social engagement on a select group of platforms. This can especially be found in African markets, where data packages tend to be restricted, or where data plans tend to subsidize data-use across certain platforms.

While social media use has generally plateaued among many of the advanced economies surveyed, fast-growth nations are home to much heavier social media users. Indonesia, the UAE, and China mark themselves out as the keenest on having a diverse social media portfolio.

**Note:** The regional breakdowns based on Q1-Q3 2019 waves of research, the average number of accounts is calculated based on analysis of 53 named networks + "Other". Of the 53 individual platforms, 24 are global and 29 are specific to certain countries or regions.

**Question:** On which of the following services do you have an account? **Source:** GlobalWebIndex 2015-2019 (averages of all waves conducted between Q1 2015 and Q3 2019) **Base:** 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), 424,326 (2019) internet users aged 16-64

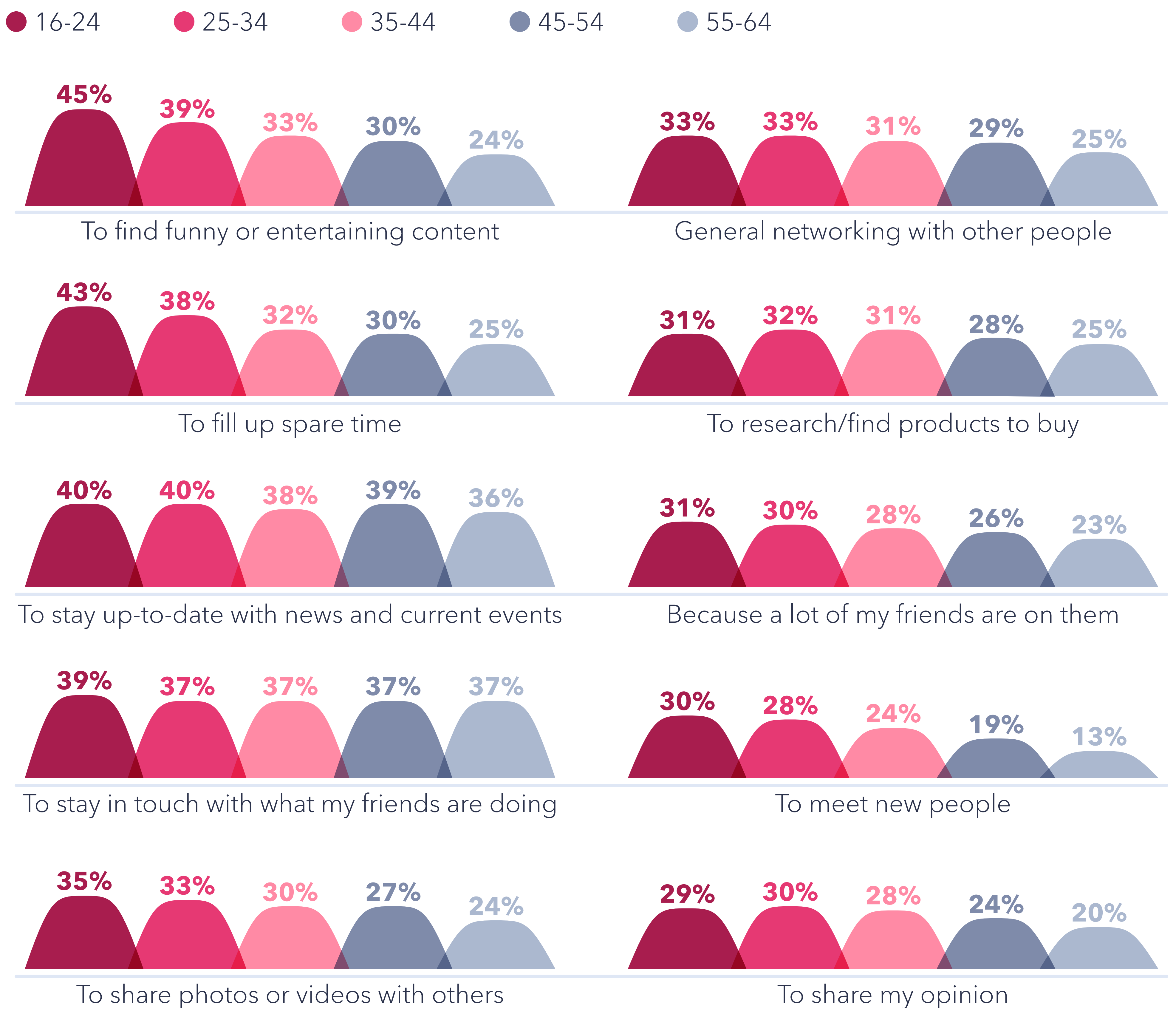
# Social media motivations

The role that social media plays in the lives of its users has evolved. The opportunities for social engagement, at all times of the day and in various locations, have **facilitated the evolution of social platforms into entertainment hubs**. It's no longer about "social" activities in the purest sense, but more purposeful activities, particularly those based around content consumption. Entertainment now **ranks as the third-most important reason for internet users (37%) but also shows the highest growth**.

16-24s are the most likely audience to list "finding funny or entertaining content" (45%) as a main reason they use social media, followed by using social media to fill up spare time (43%) and to stay up-to-date with news and current events (40%). "Keeping in touch with friends" is consistently listed as a reason for using social media across all age groups, but **it's waning as a motivator for 16-24-year-olds**. With Generation Z and millennials showing less interest in other people's updates – and the growing desire to extricate themselves from the social aspects of social media – **social media as an entertainment hub will likely become the dominant form of engagement across the most widely used open platforms**.

**MOTIVATIONS FOR USING SOCIAL MEDIA**

% who say the following are among their main reasons for using social media




**Question:** What are your main reasons for using social media?
**Source:** GlobalWebIndex Q2-Q3 2019
**Base:** 236,266 internet users aged 16-64

02

Social

# Social media landscape

• TREND IN ACTION •

# Libra hits a roadblock

**Facebook visitors are less likely to own cryptocurrency than Instagram, LinkedIn, Pinterest, or Snapchat visitors**

Unveiling a **vision** for 2030, Mark Zuckerberg unveiled a laundry list of aims for Facebook which includes Instagram storefronts, Messenger-based customer support, and remittances via WhatsApp. One project he did not mention was Libra. Facebook was planning to launch its own cryptocurrency named Libra in 2020, allowing users to make digital payments in a dozen countries. The currency would, in theory, enable Facebook's users to change dollars and other international currencies into its digital coins which can then be used to buy things on the internet and in shops/other outlets, or transfer money without needing a bank account. However, Facebook has **received** a lot of pushback to its new proposed service, perhaps even more than it would have bargained for. European Union Finance Ministers **agreed** to a de facto ban on the launch of so-called "stablecoins" such as Facebook's digital currency, until the bloc has a strategy in place to mitigate the risks posed by the technology.

03

Social

# Social media behaviors

# The social purchase journey

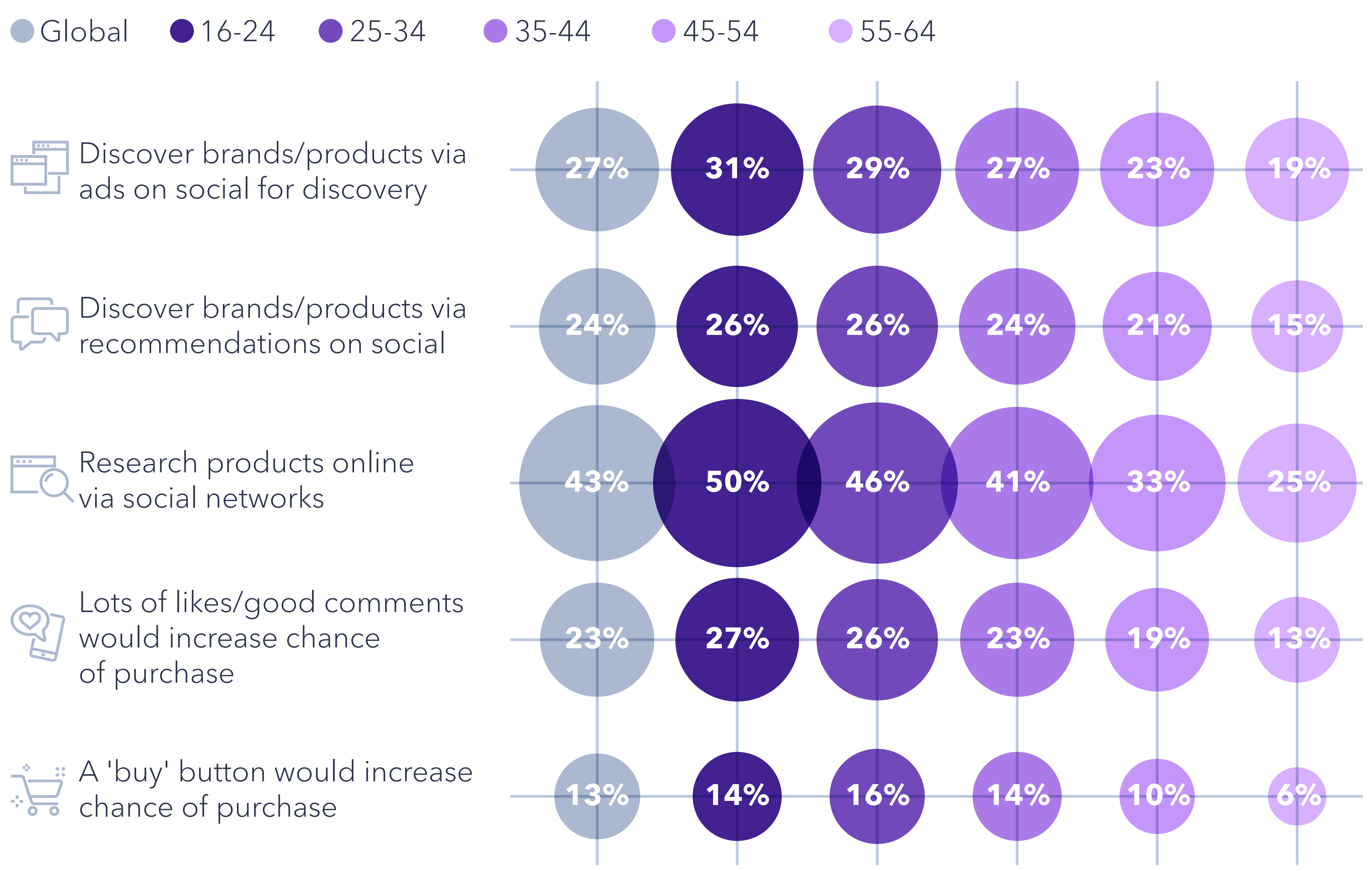
Enabling consumers to finalize a purchase while remaining within social apps has been a goal for social platforms for some time now. **Social commerce is seen to have the potential to be a major revenue generator and an important way to diversify revenue streams beyond advertising**. Across Asia, networks like **WeChat and LINE have successfully facilitated commerce via their platforms**, allowing consumers to carry out a range of commerce activities from booking taxis to paying for restaurant bills or items in-store.

But social commerce has been a tough sell in many Western markets. Online consumer habits here can be difficult to change, especially when it comes to the potentially sensitive information involved in financial transactions. **Social media can play a big role in the purchase journey right up to the point of purchase**, but the appetite to complete a final purchase within the platform remains low. Most will move to retail sites. **These benefits must be intrinsically social or deeply embedded with payment systems, and must be grounded in consumer-engagement strategies**, in order for social commerce to achieve the roaring success seen in APAC.

The prospect of using "buy" buttons on social media in the U.S. has not quite gained traction. The growing role of social networks as a way of researching products does, however, provide social video with a strong value-proposition in furthering the social commerce agenda in this market. In the U.S., **relatively smaller and more specialized social platforms like Instagram and Pinterest are best positioned to successfully and seamlessly integrate different stages of the purchase journey**. These platforms nurture the areas where social and commerce activities overlap the most, namely the research stage, where video can better bridge the online-offline shopping experience gap.

**THE SOCIAL PATH TO PURCHASE**

% who say they do the following applies to them




**Question:** How do you typically find out about new brands and products? | Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? | When shopping online, which of these features would most increase your likelihood of buying a product?
**Source:** GlobalWebIndex Q2-Q3 2019
**Base:** 284,929 internet users aged 16-64

04

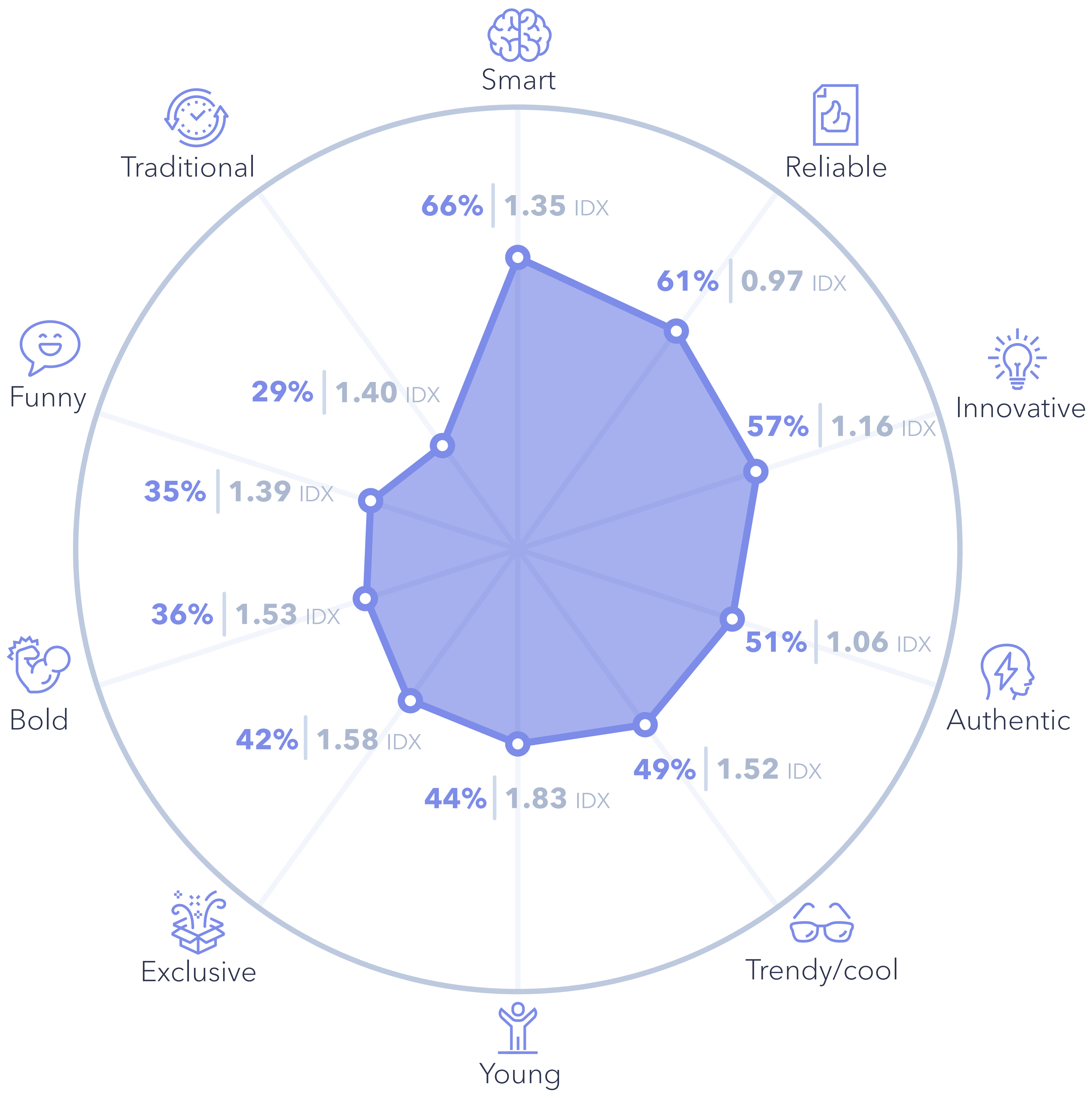
Social

# Social entertainment

# What marketers need to know

**TIKTOK USERS WANT BRANDS TO BE...**

% who want brands to exhibit the following qualities, indexed against the average internet user




For marketers, it's a useful platform for a variety of reasons. It allows them to partner with platform influencers to create striking and highly entertaining content. **And this content can stick around for a long time if it's popular;** as astutely **observed** by Louise Matsakis on Wired, TikTok is totally stripped of information such as when a video was uploaded. This means content can live in the endless feed of videos – and research shows that users evaluate older content on social media differently. By not having time stamps, TikTok subtly signals to users that it's not a platform for current news or world events, it's merely here "to inspire creativity and bring joy".

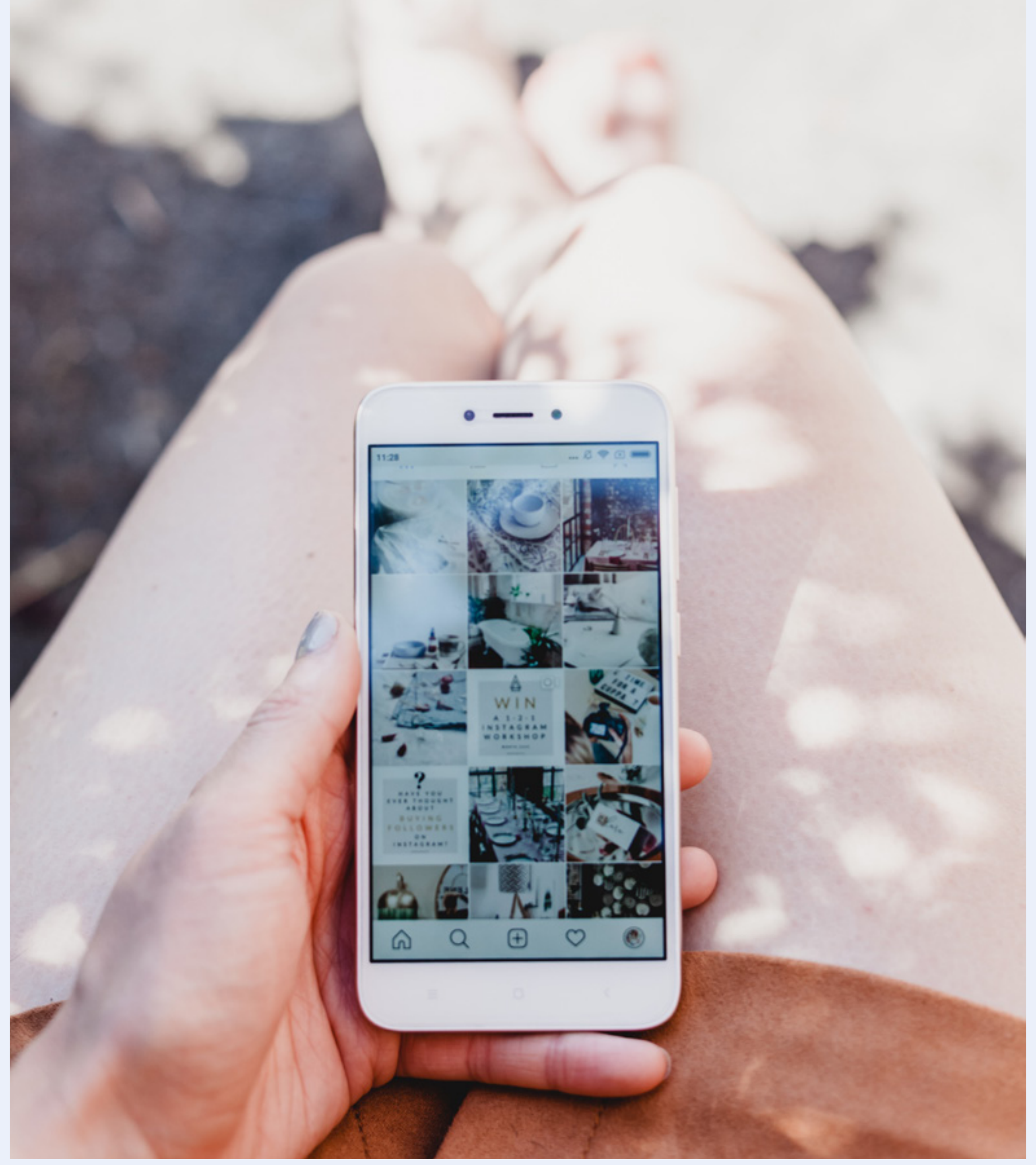
In tandem with the advertising deals that brands are making with individual influencers, TikTok **debuted** its own platform-based ad packages this year. Like any major social media network, it now integrates ads into the app's main video feed, and has a marketplace where advertisers can bid against one another for impressions.

TikTok also launched a database in September called TikTok Creator Marketplace, where brands can search for influencers with whom they can partner. Companies wanting to **launch** a sponsored campaign on TikTok are now able to browse major accounts and better understand user demographics and search by parameters like follower count, content creation topics, and audience analysis.

**Question:** Which of these do you want brands to be? **Source:** GlobalWebIndex Q2-Q3 2019 **Base:** 19,817 TikTok users aged 16-64 (excl. China)

**• TREND IN ACTION •**

# Every platform for themselves



After five years of launching Boomerang, Instagram's loop maker is getting a **big update** to its editing options which will allow users to create more interesting video content. Additionally, Instagram has **launched** a new tool called Reels which lets Instagrammers create music videos of up to 15 seconds – the same length of time on TikTok. Reels also lets users to take audio from other users to use in their own videos – much like the "Duet" feature in TikTok.

Starting in Brazil before potentially rolling out elsewhere could help Instagram nail down its customization and onboarding strategy. Luckily, Brazil has a big Instagram population; in fact, Brazil comes second out of all 46 markets we currently survey for monthly visits to Instagram (78%), only coming behind Turkey (84%).

# Social media and gaming

### SOCIAL FRUSTRATIONS AND GAMING MOTIVATIONS

% who cite the following reasons for why they're frustrated with social media and why they play games

| Frustrations with Social Media | |
|---|---|
| Discriminatory, hateful behavior | 32% |
| The number of ads I see | 30% |
| The lack of human connection | 30% |
| Concern over my profile's visibility | 27% |
| It portrays an unrealistic self-image | 27% |
| I spend too much time on it | 24% |
| The overload of information | 23% |
| It's always the same experience | 17% |
| It doesn't appeal to my interests | 12% |
| It gives me FOMO | 11% |
| I don't bond with my friends | 11% |
| I can't be myself on it | 9% |

| Gaming Motivations | |
|---|---|
| To relieve boredom | 61% |
| To have fun with people I know | 38% |
| To progress my skills | 37% |
| To enjoy competitive gaming | 36% |
| To feel immersed in the game | 34% |
| To challenge myself against others | 33% |
| To overcome challenges | 31% |
| As it allows me to be myself | 26% |
| To chat/keep up with friends | 22% |
| To share experiences with gamers | 21% |
| To build my in-game reputation | 20% |
| To collaborate and work with others | 19% |

Not only is the gaming industry reported to have a higher market value than both the music and film industries combined, but it has also started to reinvigorate how we interact with people online. For most people, **games are no longer episodic consumptive media, but are now the basis of new massive online communities**. This means that while social media is becoming more of a media consumption space, the gaming industry is emerging as a more genuine space to build connections.

Questions are starting to be asked about whether traditional social media platforms are serving their original purpose of connecting people. In a custom survey run in the UK and U.S., we found that **the third most common frustration with social media is the lack of actual human connection, and among males this is actually the top frustration**. Similar percentages are concerned over who can see their profile and social activities, and dislike the fact it portrays an unrealistic self-image.

Online games tend to not have these disadvantages. They can be played without necessarily giving too much of your personal life away to other people, and **fosters a more authentic connection through shared interest and skill**. While the dominant answer is to relieve boredom (61%), the next most-cited motivation to play games is to have fun with people they know (38%), which comes ahead of skill progression, competition, and game immersion.

Bullying, discriminatory, or hateful behavior is also a common grievance aimed at social media across all age groups. Conversely, one of the major positives associated with gaming is the feeling of authenticity and openness.

**Female online gamers in particular are much more likely to say they play online because they feel like they can be their real selves and can do so without needing to worry about being judged.**

**Gamers are more likely to say they use the internet to meet new people and make new connections, and multiplayer games are meeting this need by letting players socialize on their own terms**

**Question:** What are your biggest frustrations with using social media (e.g. Facebook, Instagram, Snapchat, etc.)? | Which of the below best describes why you play games? **Source:** GlobalWebIndex September 2019 **Base:** 4,829 internet users and 2,410 gamers in the U.S. and UK aged 16-64

# The Twitch community

Twitch is a community-driven platform, and **its streams have been found to act as virtual hangouts in which informal communities emerge, socialize, and participate**. These sub-tribes serve as safe spaces which offer a public forum to post relevant news, exchange advice, and share resources. This transition from gamers only streaming games, to opening themselves up to the community, will likely continue in the next year. However, more content from livestreamers' real lives is relatively low in the priorities of those who watch streams. In the UK and U.S., **competitions and giveaways (43%), tutorials and tips (39%), and variation in gaming genres (39%) were the most popular features they wanted to see**, but this could change as "in real life" content grows.

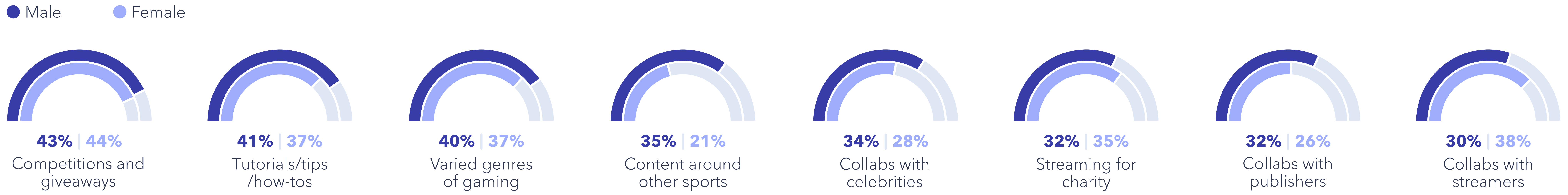
There are key gender differences in what content livestream viewers would like to see more of from the gaming influencers they watch. Males are typically more likely to cite most of the options presented, particularly wanting to see more content around other sports and collaborations with high-profile celebrities. **Females, on the other hand, show a greater preference for collaborations with other streamers and more content from influencers' real-life.**

**Content outside of gaming could be a large part of Twitch's gameplan in the coming year**. In an interview on Twitch's expansion plans, CRO Walker Jacobs revealed that it was making a lot of investment in non-gaming content, which was the fastest growing segment on Twitch. These activities, and the text-based chats that sit alongside them, create something which is more than the sum of its parts. Twitch doesn't just let you watch people play games, it also creates a feedback loop in which the user becomes part of the broadcast you are watching. **The result is a powerful new form of media that combines the publicity of broadcast with the intimacy of an online community.**

**Goldman Sachs recently forecast that esports should be on par with the NFL today in viewership numbers by 2022. Top esports teams these days are actually valued at levels similar to NBA teams in the 1980s, all of which are worth over $1B today**

**LIVESTREAM VIEWERS WANT...**

% of livestreamers who want more of the following types of content




**Question:** What content would you like to see more of from live streamers on live streaming platforms (e.g. Twitch)? **Source:** GlobalWebIndex September 2019 **Base:** 4,829 internet users and 995 live stream viewers in the U.S. and UK aged 16-64

# Enhancing the sociability

Letting gamers escape from their everyday life remains a huge part of gaming, and one which gaming franchises are continually trying to master. **The feelings of immersion and escapism form a huge part of why people game, as well as the cooperation and teamwork which resonates across all demographic breaks, particularly among 16-24s (43%)**. This plays into what gamers think could be done to enhance the social aspect of gaming, as the most popular answer was creating more challenges that involved 1-to-1 teamwork.

**The shared experience of playing with people (39%) also features prominently for why gamers play online specifically**, and 16-34s are particularly keen for more in-game events. This comes after Fortnite's hugely popular virtual concert with DJ Marshmello, which 11 million people attended live and a further **46 million** and counting have watched on YouTube.

Five years ago, Facebook acquired VR company Oculus for $2bn, and this year **snapped up** neural-interface pioneers CTRL-Labs for approximately $500 million. This all seems to be leading up to creating the world's first and best multiplayer online VR game, which could potentially open up the possibility of VR slowly supplanting the Web itself as the gameworld becomes a platform for socializing alongside play.

> **We live in a world today where it's hard for kids to go out and have unstructured play with their friends. Most of the experiences on our platform aren't just about the object to win. It's an experience you have with other people: a shared experience.**
>
> Craig Donato, Chief Business Officer, Roblox

**THE SOCIAL FACTOR**

% who say the following would most improve the social aspect of gaming


**Question:** What do you think would most improve the community/ social aspect of gaming?
**Source:** GlobalWebIndex September 2019
**Base:** 4,829 internet users and 1,395 online gamers in the U.S. and UK aged 16-64

# Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

### OUR RESEARCH

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 across 46 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

### OUR QUOTAS

To ensure that **our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

### GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q2 and Q3 2019 waves of research across 46 countries, with a global sample of 284,929 respondents.

CORE RESEARCH

| | | | |
|---|---|---|---|
| Argentina | 3,109 | Morocco | 1,930 |
| Australia | 8,092 | Netherlands | 2,640 |
| Austria | 2,573 | New Zealand | 2,595 |
| Belgium | 2,559 | Nigeria | 1,967 |
| Brazil | 4,675 | Philippines | 3,245 |
| Canada | 4,589 | Poland | 3,731 |
| China | 30,535 | Portugal | 2,558 |
| Colombia | 2,673 | Romania | 2,613 |
| Denmark | 2,532 | Russia | 5,761 |
| Egypt | 3,640 | Saudi Arabia | 3,060 |
| France | 10,265 | Singapore | 5,444 |
| Germany | 10,269 | South Africa | 3,076 |
| Ghana | 1,820 | South Korea | 2,565 |
| Hong Kong | 3,634 | Spain | 10,182 |
| India | 15,267 | Sweden | 2,618 |
| Indonesia | 3,737 | Switzerland | 2,573 |
| Ireland | 2,535 | Taiwan | 4,060 |
| Israel | 1,286 | Thailand | 4,559 |
| Italy | 10,514 | Turkey | 3,569 |
| Japan | 3,699 | UAE | 3,588 |
| Kenya | 1,986 | UK | 20,261 |
| Malaysia | 3,073 | USA | 49,850 |
| Mexico | 5,252 | Vietnam | 4,170 |

# Notes on Methodology

## ACROSS GLOBALWEBINDEX'S MARKETS

**GlobalWebIndex's research focuses exclusively on the internet population** and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

**Where a market has a high internet penetration rate, its online population will be relatively similar to its total population** and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated**. This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

## GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

## MOBILE SURVEY RESPONDENTS

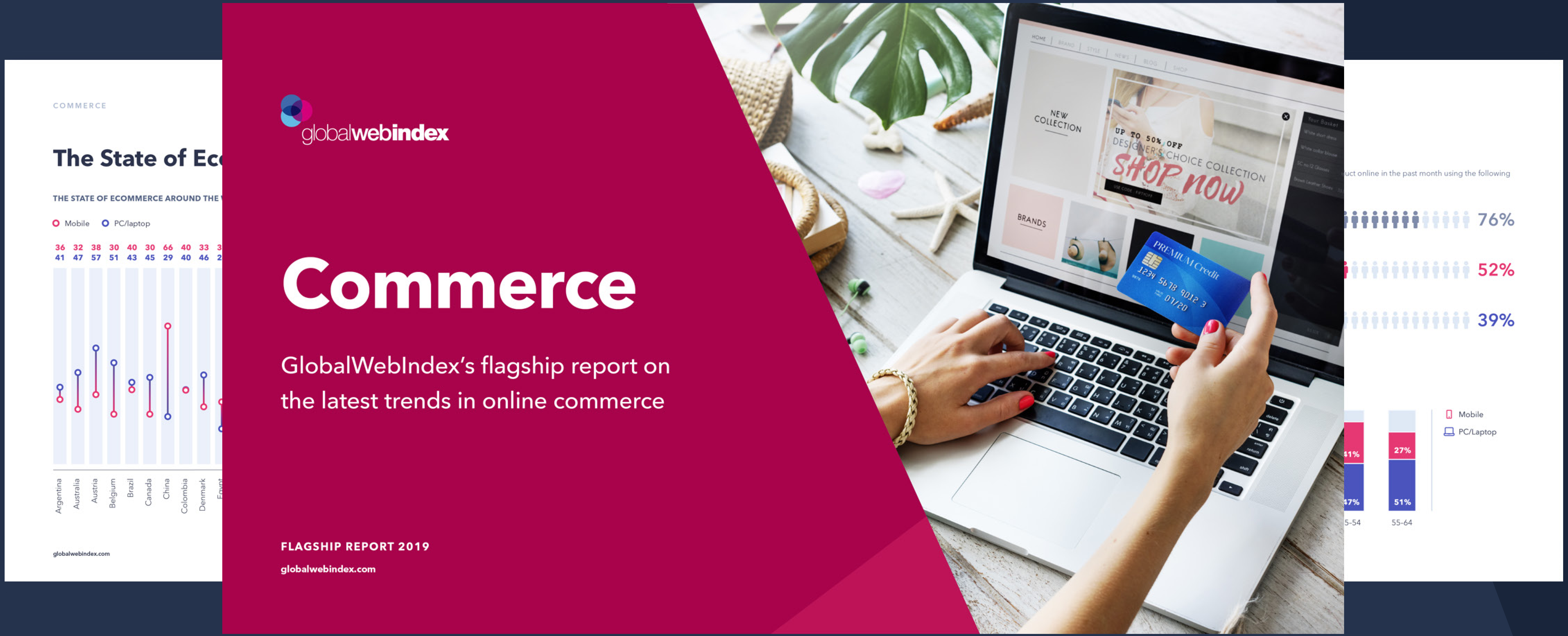
**From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile.** This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

**Please note that the sample sizes presented in the charts throughout this report may differ** as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this document.

## INTERNET PENETRATION RATES

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data.

| | | | |
|---|---|---|---|
| Argentina | 78% | Morocco | 69% |
| Australia | 88% | Netherlands | 93% |
| Austria | 88% | New Zealand | 93% |
| Belgium | 89% | Nigeria | 36% |
| Brazil | 71% | Philippines | 64% |
| Canada | 94% | Poland | 79% |
| China | 59% | Portugal | 78% |
| Colombia | 66% | Romania | 72% |
| Denmark | 97% | Russia | 80% |
| Egypt | 54% | Saudi Arabia | 83% |
| France | 85% | Singapore | 85% |
| Germany | 88% | South Africa | 62% |
| Ghana | 48% | South Korea | 95% |
| Hong Kong | 91% | Spain | 87% |
| India | 42% | Sweden | 96% |
| Indonesia | 39% | Switzerland | 96% |
| Ireland | 87% | Taiwan | 83% |
| Israel | 85% | Thailand | 58% |
| Italy | 62% | Turkey | 71% |
| Japan | 92% | UAE | 95% |
| Kenya | 43% | UK | 96% |
| Malaysia | 83% | U.S.A. | 80% |
| Mexico | 69% | Vietnam | 55% |

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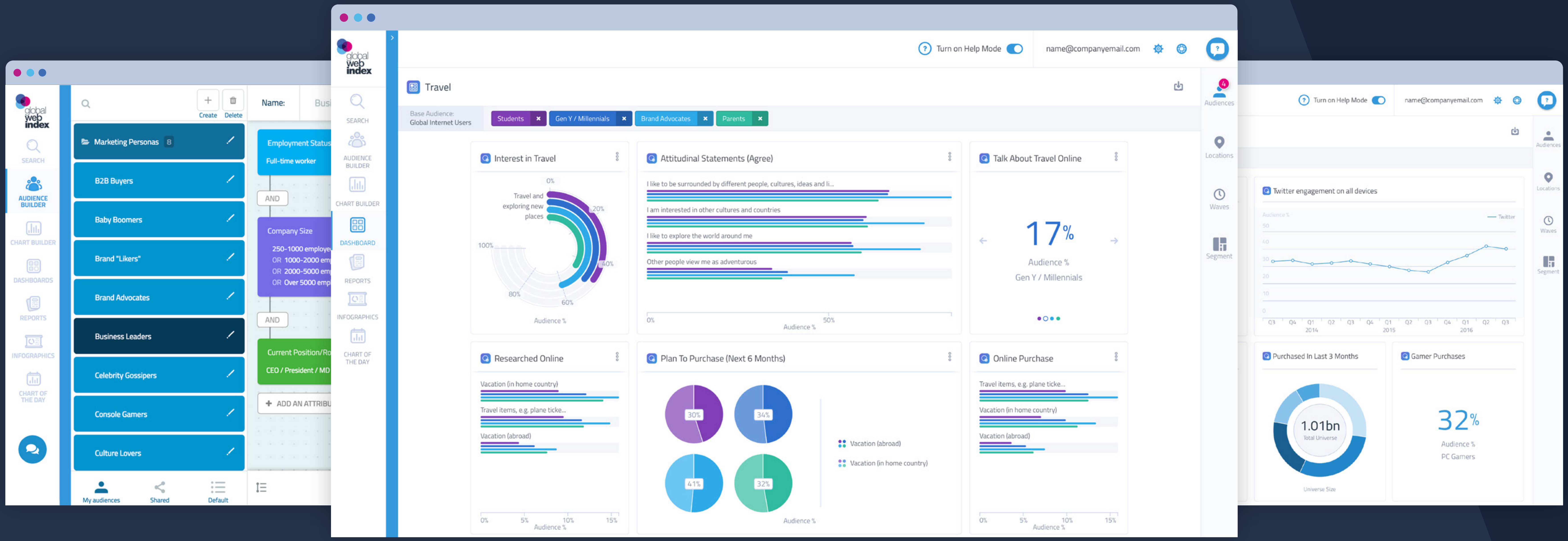


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