

Digital vs Traditional Media Consumption

Analyzing time devoted to online and traditional forms of media at a global level, as well as by age and across countries

TREND REPORT 2019

www.globalwebindex.com

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Introduction

The shift from traditional to digital media is much discussed but rarely quantified.

In this report, GlobalWebIndex offers a unique perspective on day-to-day media consumption behaviors by age and across 41 markets - analyzing how much time people are spending online, tracking the types of media they are consuming and assessing the share of time spent on digital versus traditional forms of television and print press.

Definitions

In this report, we draw on our cross-media consumption questions which ask internet users to estimate how much daily time they typically devote to the following activities:

INTERNET USAGE

Via PC/laptop/tablet
Via Mobile

TELEVISION

Linear
Online

RADIO

Traditional/Broadcast
Online Radio/Music Streaming

PRESS

Traditional Print Press/News
Online Press/News

SOCIAL NETWORKS/SERVICES

GAMES CONSOLES

As a result, all figures referring to time spent on these activities are based upon self-reported estimates and the following definitions:

LINEAR TV: Television that is traditionally broadcast and watched in real-time.

ONLINE TV/STREAMING: Television that is streamed online or watched on-demand. This includes usage of catch-up services like BBC iPlayer and TV streaming services like Netflix.

BROADCAST RADIO: Radio channels that are traditionally aired and listened to in real-time.

MUSIC STREAMING SERVICES: Radio channels that are listened to online, typically via streaming.

TRADITIONAL PRINT PRESS: Physical, printed forms of press, e.g. newspapers and magazines.

ONLINE PRESS: Press or news stories that are read online e.g. via news websites or apps.

We use this data to calculate average amounts of time spent on each activity per day from 2014 to 2018. To do this, we assign a number of minutes to each period of time (as shown below), multiply this by the relevant universe figure and then calculate the average.

This generates easily comparable data which enables us to estimate total time spent across markets or consumer segments.

Less than 30 minutes	= 0.25 hours
30 mins to 1 hour	= 0.75 hours
1 to 2 hours	= 1.5 hours
2 to 3 hours	= 2.5 hours
3 to 4 hours	= 3.5 hours
4 to 6 hours	= 5 hours
6 to 10 hours	= 8 hours
More than 10 hours	= 10 hours
Do not use	= 0 hours

Key stats and trends

On a typical day, **internet users estimate that they spend 6 ¾ hours online**. Smartphones are becoming ever more prominent within this: since 2016 estimated daily time spent online on mobiles has jumped from 2.5 hours to more than 3 ¼. Overall time spent online increased steadily from 2012 to 2017, but has since stagnated as the increase in time on mobile units has failed to fully offset the loss in time spent on larger screen units. We may be approaching a saturation point.

Age has a big impact on daily time spent online. **16-24s report being online for almost three hours longer per day than 55-64s**. The youngest consumers' enthusiasm for mobiles accounts for the difference. These devices now account 55% of their total internet time (compared to just a third for 55-64s). It's for this reason that we see 16-24s ahead for online media activities like social networking and online TV.

We're past the mobile-tipping point. Only in Japan do consumers spend longer on traditional rather than digital forms of media.

Age is the main factor: markets where digital media account for the lowest shares of time spent are mature markets with high internet penetration and older online populations.

Time spent watching linear TV has declined in 31 out of 32 countries tracked since 2014, increasing only in China, Japan, Turkey and South Korea (by 6-3 minutes). Music streaming in 2018 commands more time than online radio did in 2014 in every market tracked, and broadcast radio is down in 24 out of 32 markets. Print press declined in 24 out of 32 markets while online press increased in 26.

Daily time spent on social networks/services continues to increase. Digital consumers were spending 39 minutes longer on social networks in 2018 than they were in 2014. 16-24s and those in fast-growth markets are the most enthusiastic social networkers, but social networks are capturing more time across all the age groups and markets.

Traditional forms of media are not being abandoned, though. **Despite constant claims that the internet is taking people away from other media formats, most are actually holding their own.** Linear TV remains ahead of online TV in all markets and represents the single biggest daily media activity after social media. Similarly, broadcast radio remains ahead in the vast majority of markets. The situation is rather different for press, though: here, online is ahead of print editions in all but two markets.

Second-screening is prolific: over 85% use another device as they watch television. While socializing with friends and family through social media and messaging services is the most common simultaneous activity, some 8 in 10 also read news and play games. Encouragingly for marketers, very large shares also research the products they see on TV, which strengthens the notion that second-screening is more of a *complement* than a competitor to TV advertising.

Global trends in media consumption

Tracking media consumption behaviors from 2014-2018

KEY FIGURES

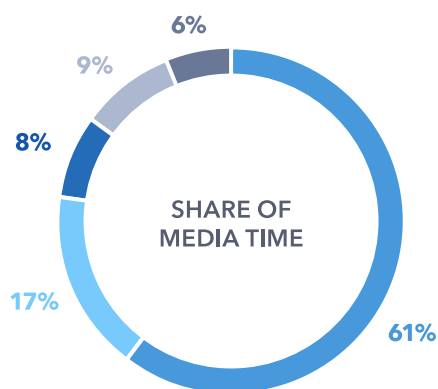
- **Digital consumers are now spending 6 ¾ hours per day online**, with 3:18 hours of this time – 51% – spent online via mobiles (up from 1 hour 17 mins in 2014).
- **Online TV has exceeded an hour per day**, but linear TV is holding steady at just under 2 hours.
- **2:20 hours a day go on social media**, accounting for the biggest share of online media time (35%).
- With over 85% second-screening as they watch TV, **simultaneous multi-media consumption is now the norm**. Mobiles are the clear device of choice here.

Daily media time

On a typical day, internet users estimate that they are now spending an **average of 6 ¾ hours online**. This means that they're spending longer online than they are on linear TV, broadcast radio, games consoles and print press combined.

Media consumption behaviors

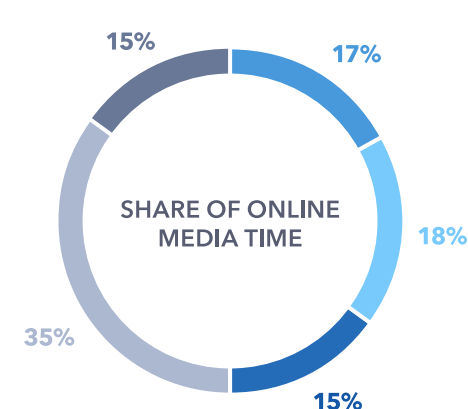
Number of hours and minutes per day typically devoted to the following



- Online **06:45**
- Broadcast TV **01:54**
- Broadcast Radio **00:53**
- Games Consoles **00:57**
- Print Press **00:40**

Online media behaviors

Number of hours and minutes per day typically devoted to the following



- Online TV **01:10**
- Music Streaming Services **01:14**
- Online Press **00:59**
- Social Media **02:20**
- Other **01:00**

That linear TV composes such a considerable chunk of this daily media time is testament to this form of entertainment still retaining a central role within daily media portfolios. **The average consumer tunes in for 1 hour and 55 minutes each day**, meaning that TV still accounts for close to a fifth of daily media time.

Of the time devoted to specific online media activities, **social networks and messaging services are by far the most popular**. They capture well over 2 hours each day, accounting for more than a third of time spent online.

Online TV/streaming has now passed the 1 hour per day mark. It reaches even higher among the 25-34-year old internet users and those in some fast-growth markets, which we often see with digital media, but in this case strong popularity in North America is boosting time spent. Globally, though, it still has some distance to cover before it can become a real challenger to traditional broadcast TV. Linear TV is still an hour ahead in average daily viewer time.

Online TV is racing ahead. In 2016, a fifth of internet users globally said they'd used Netflix in the past month. In 2017, it was over a quarter. In 2018, almost two-fifths (38%.)



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Daily media time

Media behaviors

Number of hours and minutes per day typically devoted to the following

	TOTAL	16-24	25-34	35-44	45-54	55-64	APAC	EUROPE	LAT AM	MEA	NORTH AM
Online via PC/Laptop/Tablet	03:27	03:31	03:37	03:21	03:19	03:13	03:09	03:31	04:22	04:07	03:59
Online Mobile	03:18	04:13	03:40	02:56	02:12	01:33	03:26	02:22	04:28	03:59	02:28
Social Media	02:20	02:57	02:34	02:04	01:37	01:14	02:13	01:53	03:29	03:05	02:03
Linear TV	01:55	01:30	01:50	02:00	02:17	02:43	01:36	02:16	02:17	01:56	02:51
Music Streaming Services	01:14	01:39	01:24	01:05	00:47	00:29	01:17	00:51	01:24	01:15	01:26
Online TV	01:10	01:17	01:22	01:09	00:53	00:39	01:16	00:46	01:02	01:12	01:18
Games Consoles	01:00	01:15	01:10	00:56	00:38	00:23	01:04	00:39	01:01	01:06	01:05
Online Press	00:59	01:01	01:08	01:00	00:47	00:35	01:00	00:38	01:31	01:12	00:48
Broadcast Radio	00:54	00:38	00:54	01:02	01:06	01:06	00:44	01:11	01:06	01:02	01:13
Physical Print Press	00:43	00:46	00:47	00:43	00:35	00:30	00:49	00:28	00:35	00:42	00:35

We expect figures for online TV to continue to increase. In the context of streaming devices, mirroring and other similar behaviors, maintaining a hard distinction between linear vs online TV/streaming is becoming increasingly anachronistic.

Elsewhere, time spent reading online press has gone from 50 minutes in 2016 to 59 in 2018. Music streaming has increased dramatically in the time it has been tracked, and now accounted for 1:14 hours - even as methodology changed from tracking online radios in general to only music streaming. While online radio still lags its broadcast counterpart, online news coverage is ahead of traditional print press.

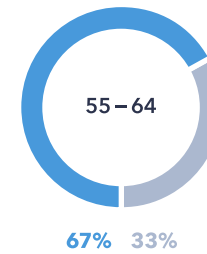
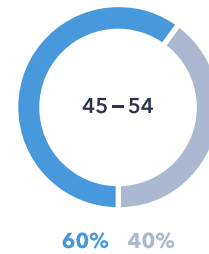
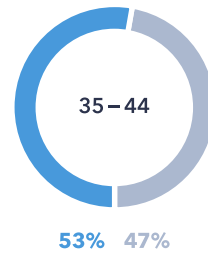
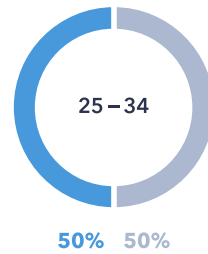
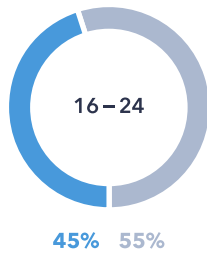


Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Daily media time

Share of daily time online by device

Number of hours and minutes per day typically devoted to the following



- Bigger Screen*
- Mobile



* Bigger screen refers to PCs, laptops or tablets

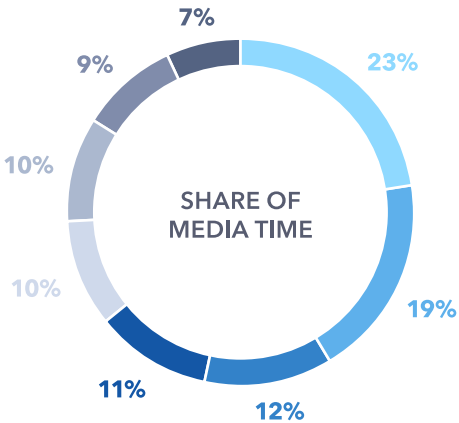


Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Media consumption: Online & offline

Daily media time: All activities

Number of hours and minutes per day typically devoted to the following



- Social Media 02:20
- Linear TV 01:55
- Music Streaming Services 01:14
- Online TV / Streaming 01:10
- Games Consoles 01:00
- Online Press 00:59
- Broadcast Radio 00:54
- Physical Print Press 00:43

When online and offline activities are examined in tandem, it's clear **just how much influence TV still exerts over daily activities**, as well as just how quickly social networking has established itself as a mainstream behavior. Taken together, these two activities account for well over 4 hours and close to 40% of media portfolios.

Arguably just as important is that physical print press remains at the bottom of the list, behind all online forms of media, despite creeping up a few minutes.



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Digital vs traditional media over time

Digital vs traditional over time

Number of hh:mm per day typically devoted to the following



Looking at the battle of digital and traditional media over time yields some interesting results. **Each year, internet users are spending consistently longer on digital media** – now devoting 28 minutes on average to the media we track.

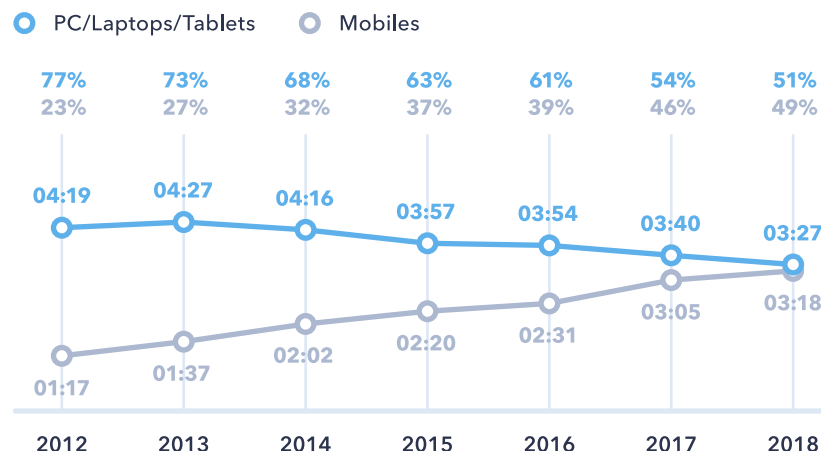
Linear TV lost 13 minutes compared to 2014. Broadcast radio gained 1 minute; print, just 4. So there is no across-the-board collapse, at least not on the global level, but the growth in media consumption happening globally is going into digital. Except for linear TV, they're similar to where they were in 2012.

That's a key point to note and one which will recur throughout this report: **despite frequent claims that the internet is taking people away from other media formats, most are holding their own.** The fact that behaviors such as second-screening are causing many activities to happen simultaneously rather than sequentially is central to this.

Since tracking began in 2012, we've seen steady, year-on-year increases in the amount of time spent on mobile. The long-expected tipping point where mobile units overtake bigger-screen devices in time spent online is likely to be no more than a year away.

Time spent online: PCs/laptops/tablets vs mobiles

Number of hh:mm typically spent online via the following devices each day



Overall increases in internet consumption are thus being driven by progressively heavier usage of mobiles – devices which have jumped from just 1 hour 17 minutes back in 2012 to 3 hours, 18 minutes in 2018. We began to observe a drop in time spent online via PCs, laptops, and tablets in 2016, which has continued.

As we outline in subsequent chapters, it's fast-growth markets and younger demographics which are at the forefront of this. **Even so, the rise of mobile internet usage is a trend which transcends all markets and segments.**



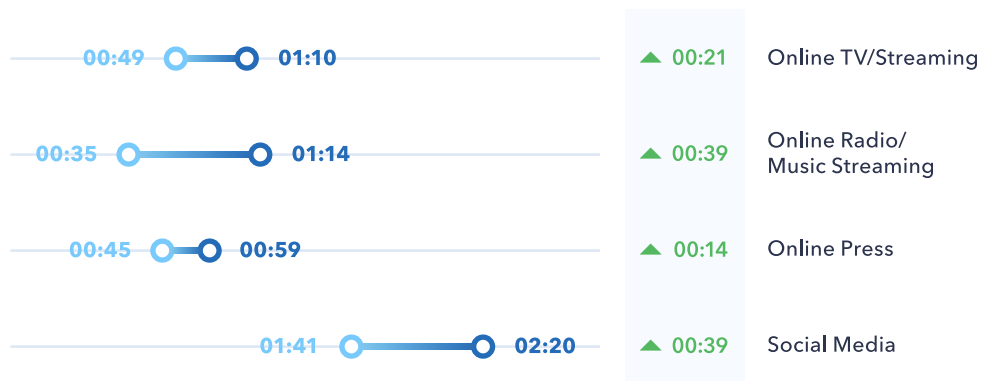
Question: Roughly how many hours do you spend on/doing the following each day? // Roughly how many hours do you spend online on a PC/ Tablet/Laptop or mobile during a typical day?
Source: GlobalWebIndex 2012–2018 (averages across all waves of research conducted in each year) **Base:** 1,489,506 Internet Users aged 16-64

Digital vs traditional media over time

Online media consumption behaviors: 2014 vs 2018

Number of hh:mm per day typically devoted to the following

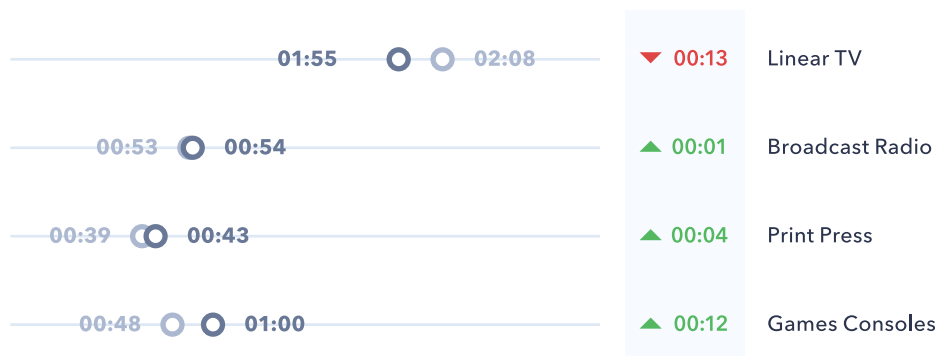
○ 2014 ○ 2018



Offline media consumptions behaviors: 2014 vs 2018

Number of hh:mm per day typically devoted to the following

○ 2014 ○ 2018



Since 2012, all of the specific online activities have seen increases in terms of the daily time devoted to them - 15% since 2016 alone.

The rate of change is accelerating. Not because of drops in traditional consumption, but the steepening of increases in digital media consumption. That does **not mean** that digital media are the be all and end all of media: depending on market or demographic, that notion would be premature. With second-screening and a blurring line between linear and online TV, for instance, we'd expect the real-life impact of these transitions to *soften* as traditional players adapt.

Social networks/services set themselves apart here, capturing an additional 39 minutes per day since 2014.

Crises of faith in social media, changes away from social to content-oriented use, and shifts from social media to messaging have not stopped this growth. At most they've dented it. As new social media, especially visual and interactive ones, arise, social media have been able to work around challenges.

Traditional forms of media have shown resilience as digital media strives forward. Except for linear TV, where decline is more pronounced, most changes in traditional subject to small year-on-year fluctuations and neither of the decreases have been sizable.



Question: Roughly how many hours do you spend on/doing the following each day?

Note: The data point Music Streaming replaced Online Radio in 2017

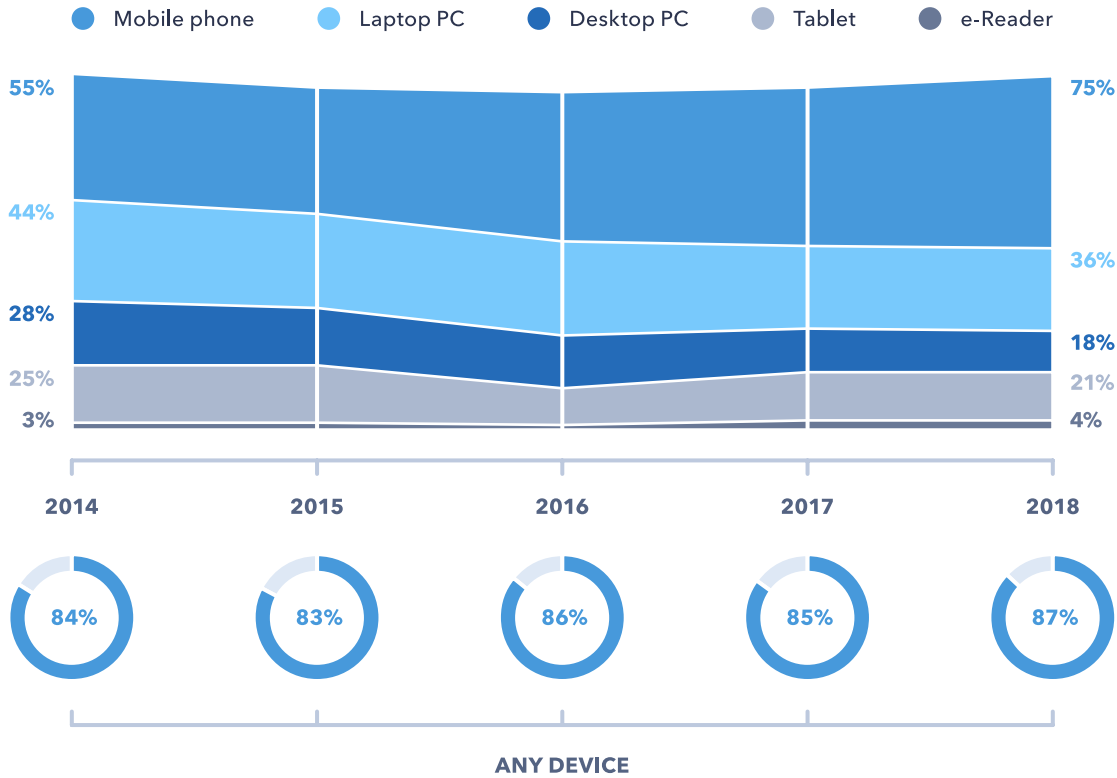
Source: GlobalWebIndex 2014 & 2018 (averages across all waves of research conducted in each year) **Base:** 168,045 (2014) & 391,130 (2018) Internet Users aged 16-64

Second-screening

With television continuing to exert so much influence over media behaviors, it's key to understand second- or dual-screening - **a widespread activity which 87% of internet users report doing**. Indeed, its mainstream nature is one of the key drivers behind online time (especially via mobile) continuing to increase each year. We're reaching a point now where social media usage is blurring so much into other forms of media, such as with the rise of streaming in gaming, that it's hard to tell where one medium begins and the other ends.

Second-screening behaviors | By device

% who have recently second-screened via the following



In terms of devices, **mobiles are the clear favorite for second-screening**. Having overtaken once-dominant laptops during 2013, they now have a 39-point lead. Meanwhile, laptops and desktops have been posting year-on-year declines since 2012. In the years ahead, these second-screening preferences will be another factor pushing online time on mobiles up even further, just as it will contribute to PCs and laptops losing further ground.



Question: Thinking about when you've watched TV recently, which of the following devices have you also used at the same time?

Source: GlobalWebIndex 2014-2018 (averages across all waves of research conducted in each year) **Base:** 1,271,434 Internet Users aged 16-64

Second-screening

Second-screening behaviors | By activity

% who were doing the following the last time they second-screened



As they second-screen, **internet users are most likely to be social networking**. Given that chatting to friends also scores very highly, we have some context for why people are spending so much of their daily time on social networks and messaging services. What's more, over 4 in 10 are reading news - again highlighting that many media activities are happening simultaneously rather than sequentially.

What's particularly striking here is that all of the **most popular second-screen activities are rather "informal" in nature** (in that they do not involve activities which automatically engage viewers with the content being aired on the main screen). 1 in 3 second-screener search for information related to what they're watching, and 1 in 6 interact with online content of the TV show while watching.

In 2016, the data suggested that **the second screen should be viewed as a distraction rather than as an additional place to drive viewer engagement**. As of 2018, this is still the case. However, integration of TVs and smartphone behaviors has increased and the potential for them to reinforce each other is still very much present.



Question: The last time you were watching TV and using the internet, which of the following were you doing?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Media consumption by age

Analyzing age-based differences in media behaviors

KEY FIGURES

- **16-24s are clocking up almost 7 ¾ hours per day online**, with 46% of this time being spent on their mobiles (3 hours 15 minutes). For 55-64s, mobiles account for just a fifth of total online time.
- **Engagement with broadcast TV and radio increases in line with age**, while the youngest age groups are spending the longest reading print press.
- **16-34s are the only age group to be watching more than an hour of online TV per day.** They are also the heaviest social networkers, devoting over 2.5 hours a day to social networks/services.

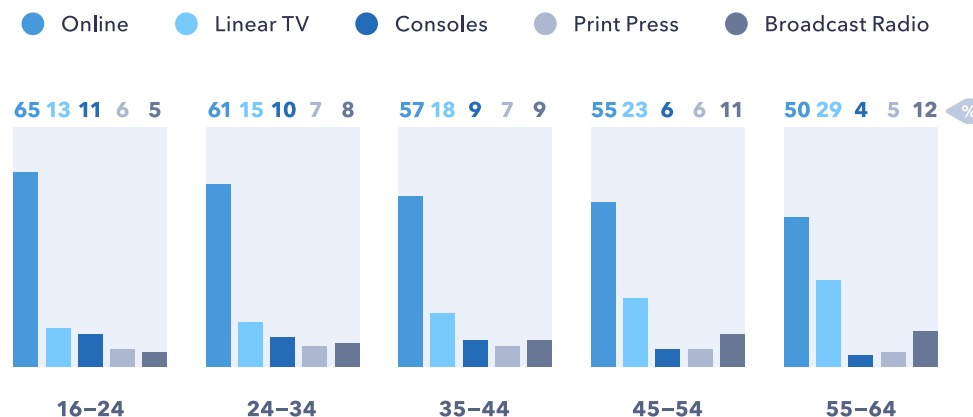
Time spent on media each day

Media consumption behaviors by age

Number of hours and minutes per day typically devoted to the following

	16-24	25-34	35-44	45-54	55-64
Total media time	11:53	11:58	10:58	10:07	09:28
Online	07:44	07:17	06:17	05:31	04:46
Linear TV	01:30	01:50	02:00	02:17	02:43
Games consoles	01:15	01:10	00:56	00:38	00:23
Print press	00:46	00:47	00:43	00:35	00:30
Broadcast radio	00:38	00:54	01:02	01:06	01:06

SHARE OF TOTAL MEDIA TIME



Younger audiences are still consuming relatively more media. After leading in time spent on media for several years, 16-34s have now yielded the top position to 25-34s, who are spending a full 29 minutes longer than the youngest cohort. 35-44-year olds have also raced ahead - driven by their increased time online *and* higher linear TV consumption.

There are important age-based patterns when it comes to the activities which make up this time. 16-24s are ferocious consumers of all media - except TV and radio. The oldest age group spend almost twice as long on linear TV as the youngest, and a fifth longer on broadcast radio.

Predictably, 16-24s lead once more when it comes to using games consoles. Arguably less expected is that the **youngest two groups are reading the most traditional print press each day.** It's often said that this sector's major challenge lies in engaging tech-oriented young consumers but it's actually in the oldest groups where we see the lowest figures. This is the product of media consumption *overall* dropping with older consumers, as well as with lower-income consumers.

When converted to percentage shares, age-based differences become particularly stark. **Time spent online and on gaming consoles accounts for 80% of all media time among 16-24s but just 50% for 55-64s.** Conversely, linear TV grabs 27% of time in the oldest age group compared to just 13% in the youngest.



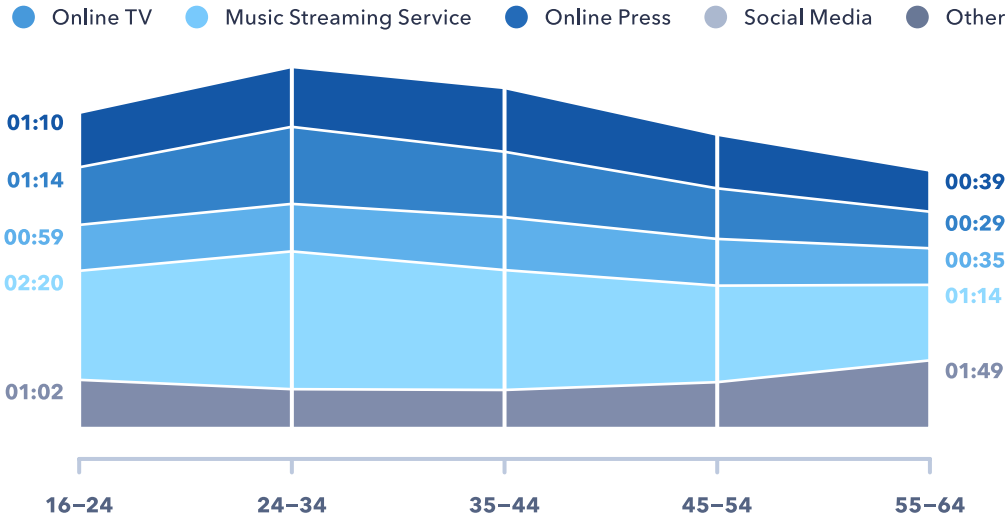
Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Online media behaviors

Online media behaviors by age

Number of hours and minutes per day typically devoted to the following

	ALL	16-24	25-34	35-44	45-54	55-64
Total Media Time	06:45	07:44	07:17	06:17	05:31	04:46
Online TV	01:10	01:17	01:22	01:09	00:53	00:39
Music Streaming	01:14	01:39	01:24	01:05	00:47	00:29
Online Press	00:59	01:01	01:08	01:00	00:47	00:35
Social Media	02:20	02:57	02:34	02:04	01:37	01:14
Other	01:02	00:50	00:49	00:59	01:27	01:49



On a typical day, **the youngest online adults are online almost 3 hours longer than their 55-64 year-old counterparts.** As a result, it's unsurprising that younger age groups tend to be ahead for the specific online activities tracked in the chart.

For TV, 16-34s are at the forefront of the shift online, and online TV/streaming has become a key part of their daily television consumption. They're spending 80% longer on this medium than the oldest consumers, but overall time spent on TV is 15% less.

25-34s - most of whom are young working professionals - are leading the shift to online forms of press. For many years they had been the only age group that averaged more than an hour per day, but now all consumers below the age of 45 do. Crucial to note, though, **all age groups are spending longer reading online press than print press.** News media aren't post-print yet, but they're online first.

One trend that transcends demographics is that social networking is by far the most important online media activity. Unsurprisingly, it's 16-24s who are the most avid social networkers, devoting over 2.5 hours a day to this activity. But **even 55-64s are now spending more than an hour on social platforms - the same as they spend on online TV and online press combined.**



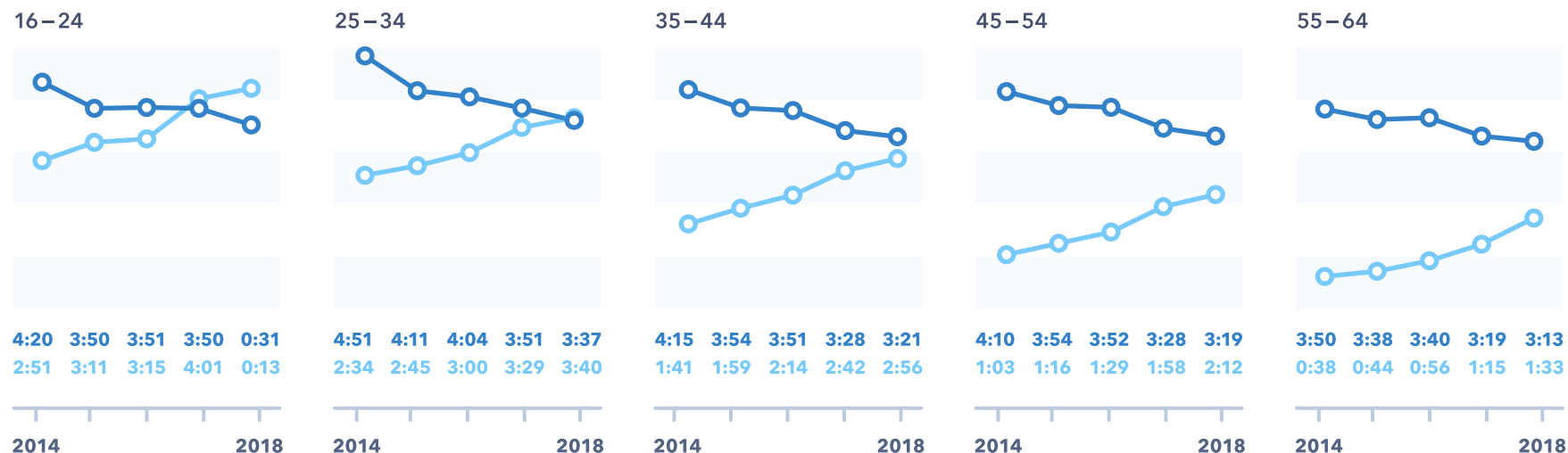
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Base: 391,130 Internet Users aged 16-64

Time spent online: PCs/laptops/tablets vs mobiles

Time spent online: PCs/laptops/tablets vs mobiles

Number of hours and minutes typically spent online via the following devices each day

 Mobile  PC/Laptop/Tablet



Globally, we saw earlier that mobiles continue to capture more and more time. **Respondents in each age group are spending an hour longer on mobile internet than they were in 2014.**

Growth has been persistent both in absolute numbers and as a share of all time spent. While they started from very different starting points, consumers in every age group have seen a slow, steady rise since 2014.

25-34s, for example, have added more than an hour mobile internet usage since 2014 and are close to spending 4 hours per day. 16-24s and 35-44s have also seen big increases here, with the former spending the longest of all on their mobiles (4 hours 13 minutes, up 47% since 2014).

Mobiles continue to push new ground and have doubled the share of time online they account for with the oldest segment. 55-64s, have added just under an hour (54 minutes), and they're now averaging 2.4 times longer than they were just four years ago. In relative terms their increase is the highest, but we are most likely still several years away from consumers in this age bracket becoming mobile-first.

For many years, mobile units added to the overall amount of time people spent on media without cannibalizing time that was spent on larger screen units. Time spent on devices other than mobile phones has declined by an average 20% as mobile units have seen increased between 43% and 140%.



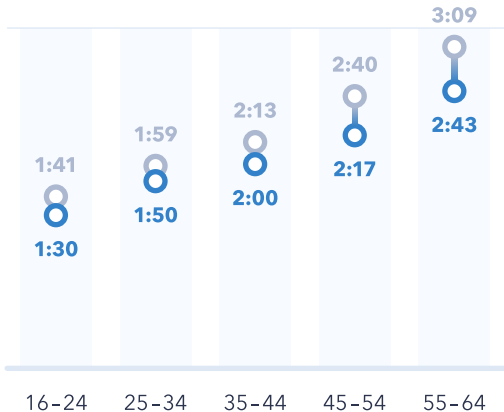
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Daily media behaviors: 2014 vs 2018

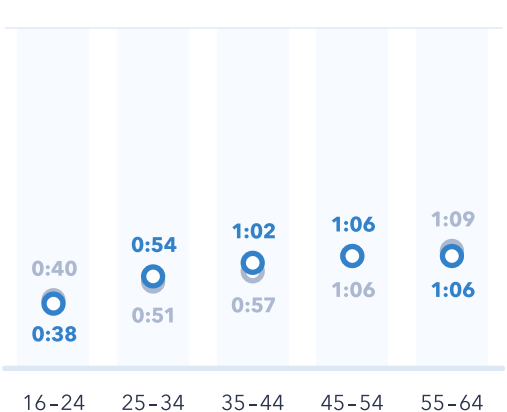
Offline media consumptions behaviors: 2014 vs 2018

Number of hours and minutes per day typically devoted to the following ○ 2014 ○ 2018

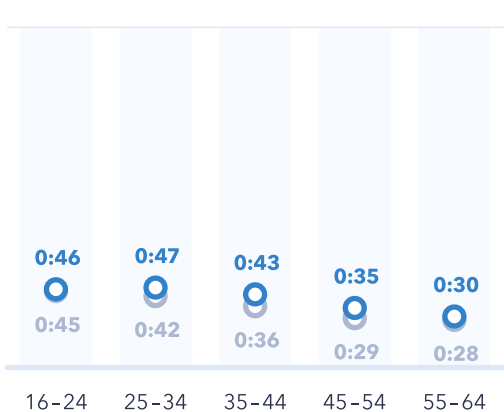
LINEAR TV



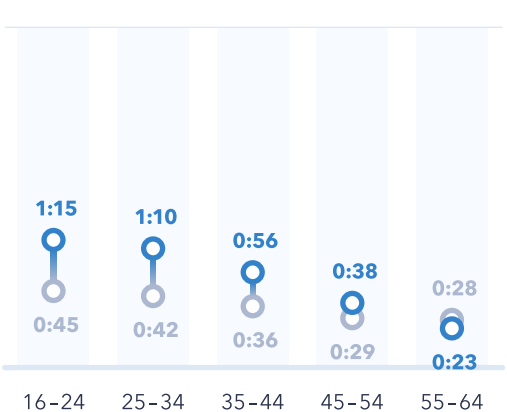
BROADCAST RADIO



PRINT PRESS



GAMES CONSOLES



Taking a look at the specific offline/online media behaviors over time yields some interesting results. In the past four years, the largest movement in media consumption has been increase in time spent on social media and the rise of streaming.

Linear TV uniquely affected by changing media consumption habits. This isn't just a millennial trend. Linear TV is weakening among its most dedicated viewers, the 55-64 year olds. It's still by far the most important media for them, but TV lost as many minutes as social media gained in the past four years. In the same period, every digital medium except console gaming (already the lowest) saw increases.



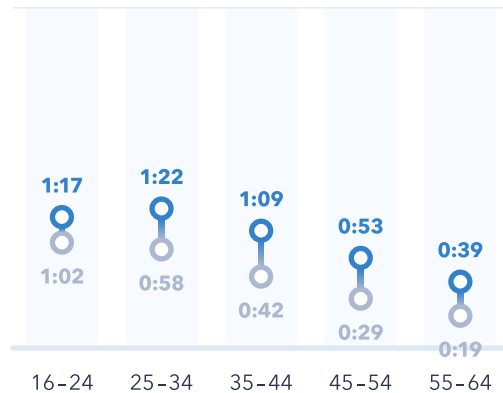
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Source: GlobalWebIndex 2014 & 2018 (averages across all waves of research conducted in each year)
Base: 168,045 (2014) & 391,130 (2018) Internet Users aged 16-64

Daily media behaviors: 2014 vs 2018

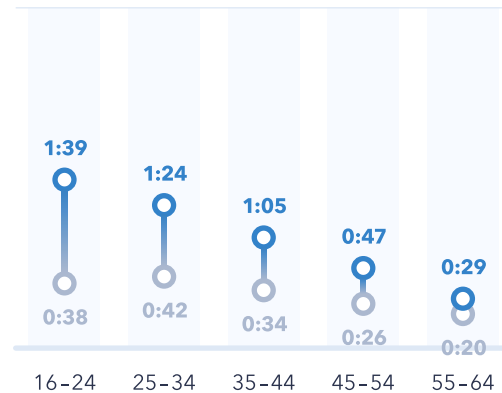
Online media consumptions behaviors: 2014 vs 2018

Number of hours and minutes per day typically devoted to the following ○ 2014 ○ 2018

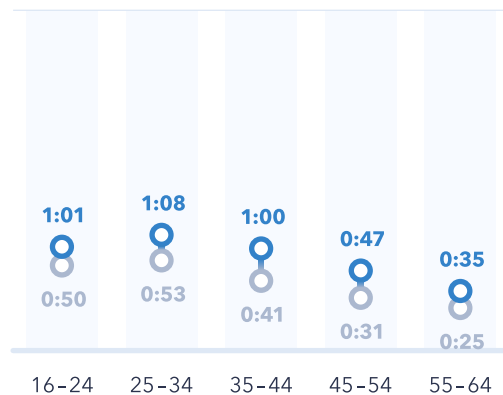
ONLINE TV/STREAMING



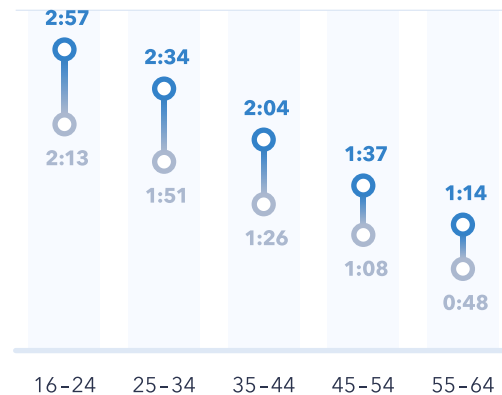
ONLINE RADIO/MUSIC STREAMING



ONLINE PRESS



SOCIAL MEDIA



Interestingly, **all the online activities have seen consistent cross-age increases.**

Although for online radio and press these rises are only a few minutes or so, they are much more substantial for social networks/services. 55-64s have seen the smallest increases, but even for these internet users, they're still spending almost half an hour longer on these services in 2018 than they were back in 2016, where increases had already been noted.

Music streaming replaced online radio in the survey in 2017. Despite the narrower scope of this question (e.g. omitting talk radio or news), music streaming has grown rapidly in importance since then and compared to how online radio was performing in our benchmark year, 2014. Younger respondents have especially flocked to this medium. Growth here was only surpassed by social media.



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2014 & 2018 (averages across all waves of research conducted in each year)
Base: 168,045 (2014) & 391,130 (2018) Internet Users aged 16-64

National differences in media consumption

Country-by-country figures for all key metrics

KEY FIGURES

- **There are just 7 markets tracked by GlobalWebIndex where consumers are spending longer each day on traditional rather than digital forms of media** – these are mature markets with digitally-conservative and older online populations, mainly in Europe, but notably also Japan.
- **Fast-growth markets lead when it comes to the total daily time devoted to media.** Vietnam tops the table overall, while Hong Kong and Sweden lead as mature markets.
- **In many fast-growth markets, mobiles are now capturing more than 50% of online time – most importantly China.** The equivalent figures dip down to 30-35% in older European markets, though the ratio even in these markets increasingly favors mobile units.
- **GlobalWebIndex can now identify 16 markets where people are watching online TV for more than 1 hour per day, up from 7 in 2016.** Fast-growth nations in APAC and the Middle East are at the forefront, while the U.S. takes fourth place overall as the highest-ranking and largest developed market.

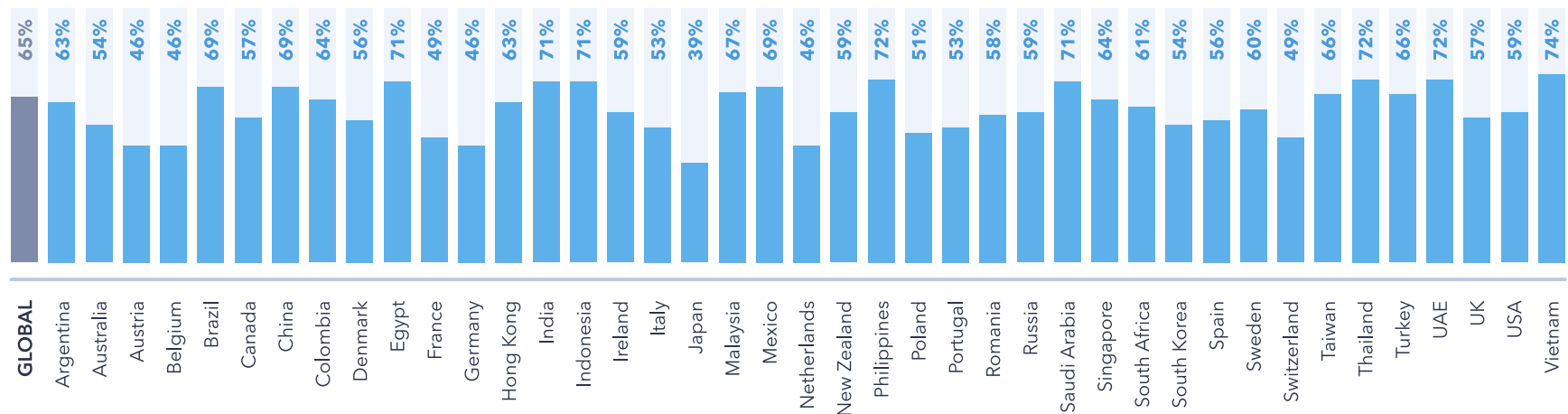
Digital vs traditional by market

Digital vs traditional media by market

Number of hours and minutes per day typically devoted to the following

	DIGITAL	TRADITIONAL		DIGITAL	TRADITIONAL		DIGITAL	TRADITIONAL		DIGITAL	TRADITIONAL
Global	06:45	03:33	France	03:42	03:54	New Zealand	04:44	03:21	Sweden	05:37	03:46
Argentina	07:16	04:13	Germany	03:37	04:18	Philippines	09:51	03:45	Switzerland	03:55	04:01
Australia	04:26	03:50	Hong Kong	05:17	03:07	Poland	04:54	04:41	Taiwan	05:15	02:40
Austria	03:33	04:10	India	07:33	03:09	Portugal	04:28	03:57	Thailand	09:50	03:52
Belgium	03:57	04:33	Indonesia	08:22	03:29	Romania	06:23	04:35	Turkey	06:52	03:37
Brazil	09:25	04:11	Ireland	05:21	03:40	Russia	04:54	03:20	UAE	07:24	02:51
Canada	05:17	03:57	Italy	04:37	04:04	Saudi Arabia	08:27	03:26	UK	05:44	04:25
China	06:53	03:07	Japan	01:52	02:59	Singapore	05:46	03:13	USA	06:53	04:45
Colombia	07:28	04:12	Malaysia	07:30	03:40	South Africa	07:00	04:33	Vietnam	07:12	02:34
Denmark	05:34	04:17	Mexico	07:45	03:28	South Korea	03:45	03:12			
Egypt	08:06	03:20	Netherlands	03:53	04:29	Spain	04:45	03:40			

DIGITAL SHARE OF TOTAL DAILY MEDIA TIME



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Digital vs traditional by market

There are just 7 markets tracked by GlobalWebIndex where consumers are spending longer each day on traditional rather than digital forms of media –

these are mature markets with digitally-conservative and older online populations, mainly in Europe, but notably also Japan.

There are other specific reasons to explain this trend too. In the U.S.A, the enduring popularity of linear TV is the main contributor. In the clutch of Western European markets (Belgium, France, Germany and Netherlands), the relative lack of enthusiasm for social networking is key.

There are strong market-by-market variations in the total daily time devoted to media. Broadly speaking, **it is fast-growth markets which lead here**. Thailand tops the table on a substantial 13 hours and 42 minutes, followed by Brazil and the Philippines both in excess of 13.5 hours.

As discussed in the introduction, this is primarily driven by fast-growth markets having relatively low internet penetration rates; that means their online populations contain higher-than-average numbers of young, urban and affluent adults and these demographics are naturally more engaged with online media. What's more, these same markets have embraced mobiles the most enthusiastically: they spend the most time online each day and are also more likely to be consuming media simultaneously rather than sequentially (e.g. by second-screening).

It's also generally these markets where **online sources account for the highest shares of total media consumption** – with the UAE having seen the biggest shift of all (where internet users are spending over twice as long on digital than traditional media forms). It's a similar story in Taiwan too.

Of the mature markets we track, **the U.S. is spending the longest on media each day (11:38)**. That's a direct result of Americans, especially older ones, watching so much linear television each day (just under 3 hours).

Traditional media behaviors

Offline media behaviors in 2018

Number of hours and minutes per day typically devoted to the following

	LINEAR TV	RADIO	PRINT PRESS	CONSOLES		LINEAR TV	RADIO	PRINT PRESS	CONSOLES
Argentina	02:20	01:24	00:28	00:48	Netherlands	02:13	01:48	00:26	00:36
Australia	02:16	01:09	00:24	00:39	New Zealand	01:48	01:08	00:23	00:36
Austria	01:53	01:44	00:32	00:26	Philippines	02:18	00:51	00:35	01:36
Belgium	02:15	01:47	00:30	00:33	Poland	02:17	01:54	00:29	00:37
Brazil	02:28	01:04	00:39	01:03	Portugal	02:05	01:21	00:30	00:31
Canada	02:15	01:14	00:27	00:45	Romania	02:39	01:24	00:31	00:52
China	01:21	00:46	00:58	01:04	Russia	02:10	00:50	00:19	00:29
Colombia	02:19	01:17	00:34	00:51	Saudi Arabia	01:55	00:44	00:47	01:26
Denmark	02:05	01:24	00:47	00:45	Singapore	01:35	01:00	00:37	00:42
Egypt	01:50	00:46	00:43	01:04	South Africa	02:13	01:40	00:39	00:54
France	02:31	01:00	00:22	00:38	South Korea	02:09	00:36	00:27	00:33
Germany	02:16	01:32	00:30	00:34	Spain	02:07	01:06	00:26	00:41
Global	01:55	00:54	00:43	01:00	Sweden	01:59	01:15	00:31	00:40
Hong Kong	01:43	00:45	00:38	00:54	Switzerland	01:53	01:35	00:32	00:29
India	01:39	00:42	00:48	01:10	Taiwan	01:33	00:35	00:31	00:40
Indonesia	02:04	00:42	00:42	01:19	Thailand	02:13	00:47	00:51	01:40
Ireland	01:59	01:14	00:26	00:40	Turkey	02:12	00:41	00:43	00:51
Italy	02:16	01:12	00:36	00:40	UAE	01:23	00:48	00:39	01:05
Japan	02:12	00:28	00:19	00:23	UK	02:36	01:16	00:31	00:57
Malaysia	01:50	01:06	00:42	01:05	USA	02:55	01:13	00:35	01:07
Mexico	01:58	00:58	00:31	01:06	Vietnam	01:20	00:30	00:43	01:07

*Figures in bold represent the top markets for each activity



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

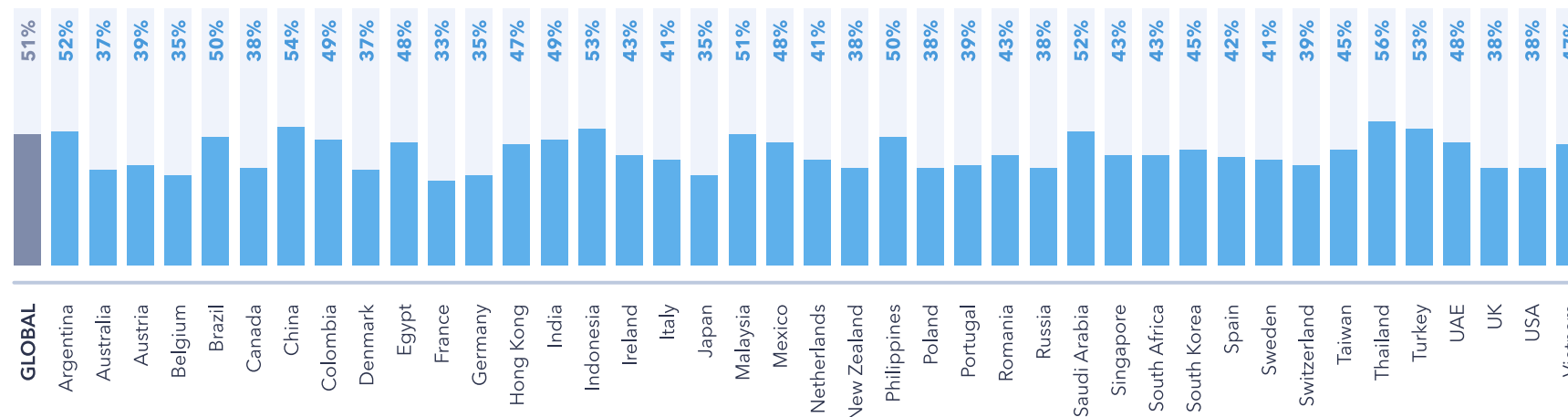
Time spent online: PCs vs mobiles

Time spent online: PC/laptops/tablets vs mobiles

Number of hours and minutes typically spent online via the following devices each day

	MOBILE	PC/TABLET		MOBILE	PC/TABLET		MOBILE	PC/TABLET		MOBILE	PC/TABLET
Global	03:18	03:27	France	01:35	03:15	New Zealand	02:16	03:43	Sweden	02:28	03:29
Argentina	04:26	04:10	Germany	01:37	03:04	Philippines	05:04	05:04	Switzerland	01:59	03:09
Australia	01:55	03:18	Hong Kong	03:04	03:25	Poland	02:19	03:47	Taiwan	03:30	04:18
Austria	02:01	03:12	India	03:39	03:53	Portugal	02:39	04:10	Thailand	05:16	04:11
Belgium	01:47	03:20	Indonesia	04:32	04:01	Romania	03:21	04:22	Turkey	03:56	03:31
Brazil	04:47	04:43	Ireland	02:35	03:29	Russia	02:36	04:15	UAE	03:51	04:09
Canada	02:16	03:42	Italy	02:27	03:32	Saudi Arabia	03:39	03:22	UK	02:13	03:40
China	03:19	02:47	Japan	01:26	02:42	Singapore	03:03	04:08	USA	02:30	04:08
Colombia	04:23	04:29	Malaysia	04:09	04:02	South Africa	03:44	04:54	Vietnam	03:15	03:43
Denmark	01:56	03:19	Mexico	03:57	04:13	South Korea	02:27	03:00			
Egypt	03:49	04:07	Netherlands	01:56	02:46	Spain	02:16	03:06			

MOBILE SHARE OF DAILY ONLINE TIME



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

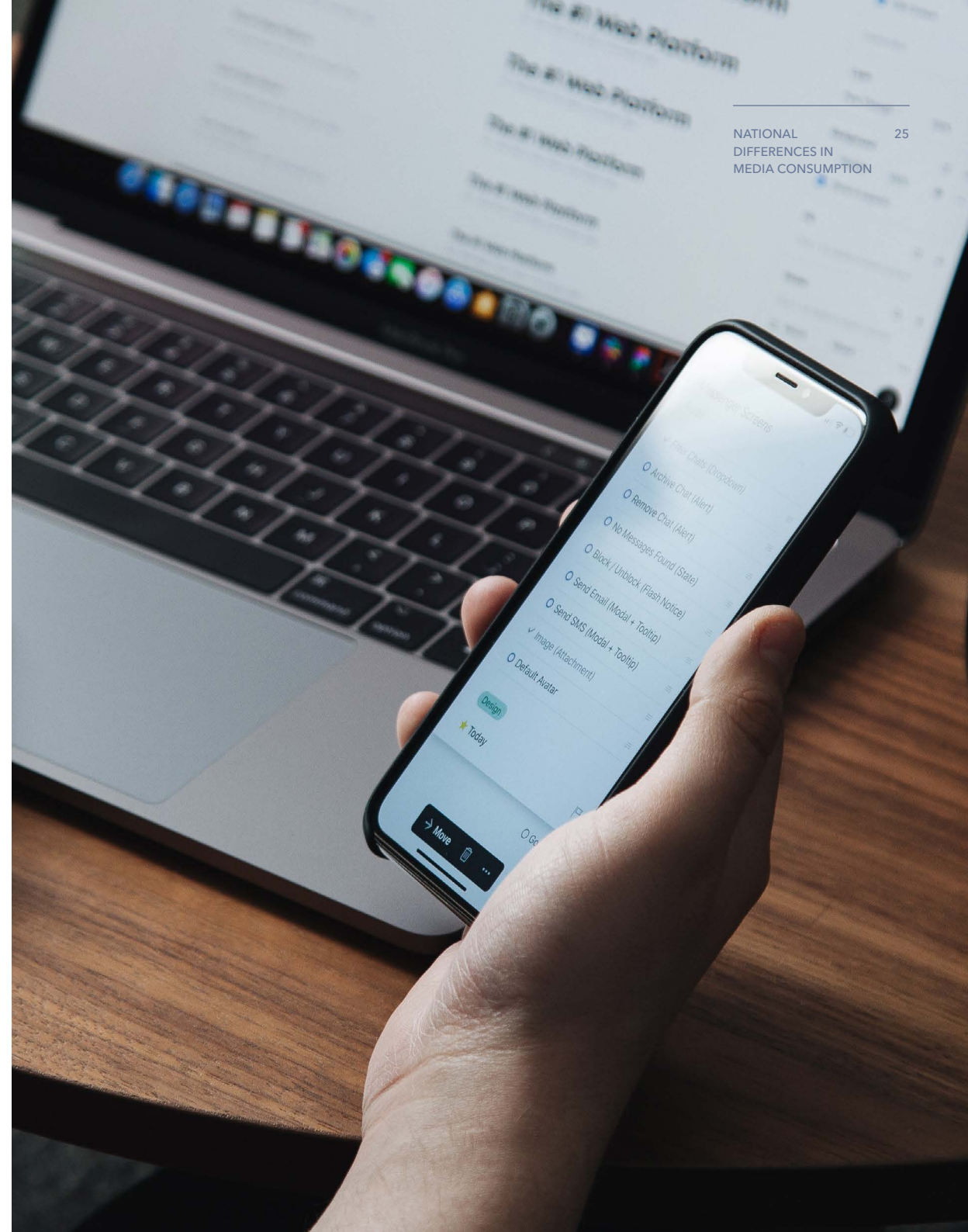
Time spent online: PCs vs mobiles

As mentioned, **fast-growth markets have embraced mobiles the most enthusiastically**. As well as swathes of consumers coming online for the first time via these devices, internet users in these markets are also most likely to select their smartphone when we ask them their most important device for getting online.

This is particularly apparent when we look at the share of online time that mobiles are capturing each day. **In most fast-growth markets, mobiles account for more than 50% of online time** – meaning they have passed the Mobile Tipping Point – the point when internet users will be spending longer online on their mobiles than all other devices *combined*.

The equivalent figures can be much, much lower in several mature markets, dipping to 35% or below in the digitally-conservative markets of France, Belgium and Japan. **Around 5 of the 34 markets are spending less than around 1.5 hours a day on their mobiles** – a figure which compares to more than *five hours* in Thailand and the Philippines.

In part, the picture in these mature markets is the result of their high internet penetration rates, which means its online population contains a relatively high proportion of older consumers – a group who are much more likely to remain wedded to their PCs/laptops. Older consumers are beginning to shift more time onto mobile units, but change is slow.



Online media behaviors

Online media behaviors in 2018

Number of hours and minutes per day typically devoted to the following

	MUSIC STREAMING	SOCIAL MEDIA	ONLINE PRESS	ONLINE TV/ STREAMING		MUSIC STREAMING	SOCIAL MEDIA	ONLINE PRESS	ONLINE TV/ STREAMING
Argentina	01:17	03:18	00:59	00:53	Netherlands	00:47	01:17	00:34	00:37
Australia	00:50	01:35	00:31	00:49	New Zealand	00:55	01:43	00:30	00:59
Austria	00:37	01:16	00:33	00:39	Philippines	01:59	04:08	00:50	01:15
Belgium	00:39	01:32	00:39	00:33	Poland	00:58	01:45	00:44	00:48
Brazil	01:25	03:39	02:10	01:06	Portugal	00:45	02:13	00:25	00:32
Canada	01:04	01:48	00:36	01:02	Romania	01:07	02:36	00:52	00:54
China	01:15	02:01	01:04	01:28	Russia	00:42	02:22	00:35	00:43
Colombia	01:08	03:35	00:58	00:54	Saudi Arabia	01:14	02:52	01:26	01:28
Denmark	01:07	01:36	00:59	01:05	Singapore	01:06	02:11	00:49	00:56
Egypt	01:13	03:05	01:25	01:17	South Africa	01:20	02:58	00:50	00:55
France	00:42	01:23	00:28	00:29	South Korea	00:47	01:12	00:31	00:40
Germany	00:38	01:08	00:34	00:41	Spain	00:47	01:42	00:44	00:49
Global	01:14	02:20	00:59	01:10	Sweden	01:27	01:50	00:45	00:54
Hong Kong	00:47	01:53	00:50	00:51	Switzerland	00:45	01:19	00:39	00:40
India	01:34	02:28	01:00	01:19	Taiwan	01:01	01:53	00:48	00:52
Indonesia	01:26	03:23	01:16	00:57	Thailand	01:31	03:14	01:44	01:39
Ireland	01:03	01:55	00:39	01:01	Turkey	01:20	02:54	00:50	00:55
Italy	00:47	01:49	00:38	00:41	UAE	01:10	03:00	00:56	01:12
Japan	00:17	00:40	00:15	00:15	UK	01:07	01:51	00:40	01:07
Malaysia	01:20	03:04	00:54	01:04	USA	01:29	02:05	00:50	01:20
Mexico	01:32	03:15	00:48	01:02	Vietnam	01:07	02:33	01:12	01:11

*Figures in bold represent the top markets for each activity



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Online media behaviors

Social media: 2014 vs 2018

Number of hours and minutes per day typically devoted to social media services

	2014	2018		2014	2018
Global	01:41	02:20	Morocco	–	02:34
Argentina	02:50	03:18	Netherlands	01:02	01:17
Australia	01:11	01:35	New Zealand	–	01:43
Austria	–	01:16	Nigeria	–	03:26
Belgium	–	01:32	Philippines	03:25	04:08
Brazil	02:50	03:39	Poland	01:13	01:45
Canada	01:29	01:48	Portugal	–	02:13
China	01:24	02:01	Romania	–	02:36
Colombia	–	03:35	Russia	01:49	02:22
Denmark	–	01:36	Saudi Arabia	02:35	02:52
Egypt	–	03:05	Singapore	01:36	02:11
France	01:11	01:23	South Africa	02:16	02:58
Germany	01:04	01:08	South Korea	00:58	01:12
Ghana	–	03:09	Spain	01:26	01:42
Hong Kong	01:27	01:53	Sweden	01:22	01:50
India	02:03	02:28	Switzerland	–	01:19
Indonesia	02:26	03:23	Taiwan	01:41	01:53
Ireland	01:11	01:55	Thailand	02:41	03:14
Italy	01:47	01:49	Turkey	02:25	02:54
Japan	00:17	00:40	UAE	02:48	03:00
Kenya	–	02:59	UK	01:19	01:51
Malaysia	02:48	03:04	USA	01:40	02:05
Mexico	02:53	03:15	Vietnam	02:07	02:33

When it comes to specific online behaviors/ activities, **social networking captures the biggest share of online time on a global level and in all markets.** But the actual time devoted to this varies dramatically between markets. Countries in Latin America tend to post the highest figures of all, whereas Japanese consumers are spending just 40 minutes. This is up from 2016, but still lagging many other countries. Japan’s general lack of enthusiasm for social media, and particularly Facebook’s lack of success in this country, is having an impact here. Just 35% of internet users in Japan report visiting Facebook in the past month, compared to 96% in its top market, the Philippines and a global average of 79% (not counting China).

Elsewhere, **there are now 16 markets where people are watching online TV for an average of more than 1 hour per day,** up from 7 hours in 2016. Fast-growth nations in APAC and the Middle East are at the forefront here, though it’s interesting that the U.S. takes second place overall – a clear reflection of the U.S. being the biggest user of services like Netflix and this market’s ingrained love of television content.



Question: Roughly how many hours do you spend on/doing the following each day?
Source: GlobalWebIndex 2014 & 2018 (averages of all research waves conducted in each year) **Base:** 168,045 (2014) & 391,130 (2018) Internet Users aged 16-64

Traditional vs digital: TV, radio & press

Tracking the progress of digital versus traditional in key entertainment categories

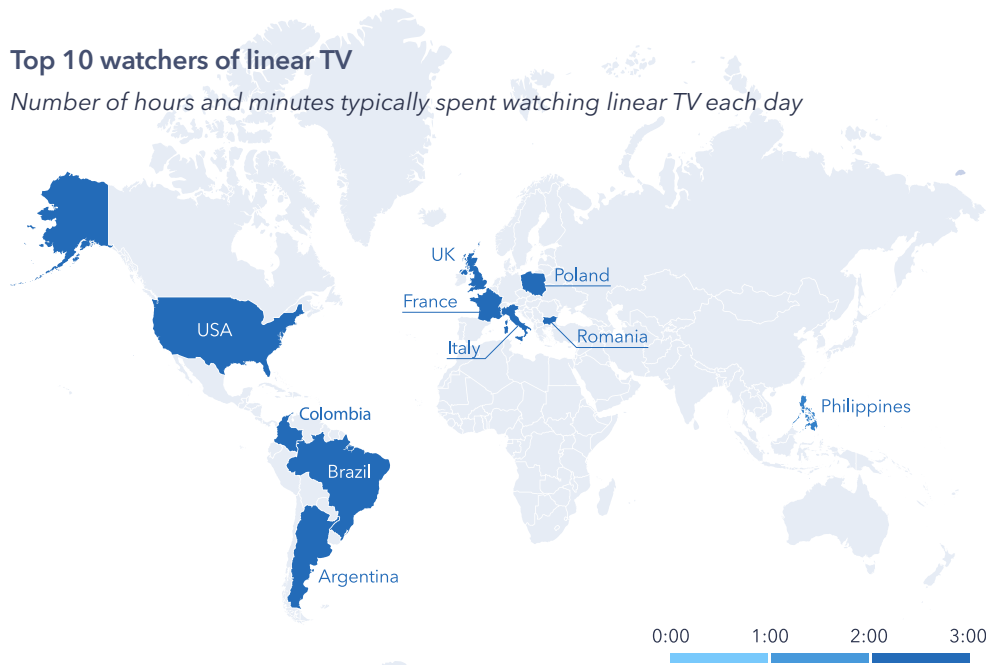
KEY FIGURES

- Across 33 markets where trended data from 2014 onwards is available, **daily time spent on linear TV has declined in 29, broadcast radio is down in 29, and physical print press has dipped in 26**. Meanwhile, online TV has recorded increases in 28 of 31 countries, online radio/streaming is up in 21 and online press has risen in 23 places.
- Linear TV remains ahead of online TV in all 41 markets.
- For radio/music, online has taken the lead from broadcast forms in 4 markets.
- Online press is now preferred to printed versions in all but 1 market (Japan).

Linear TV vs online TV

Top 10 watchers of linear TV

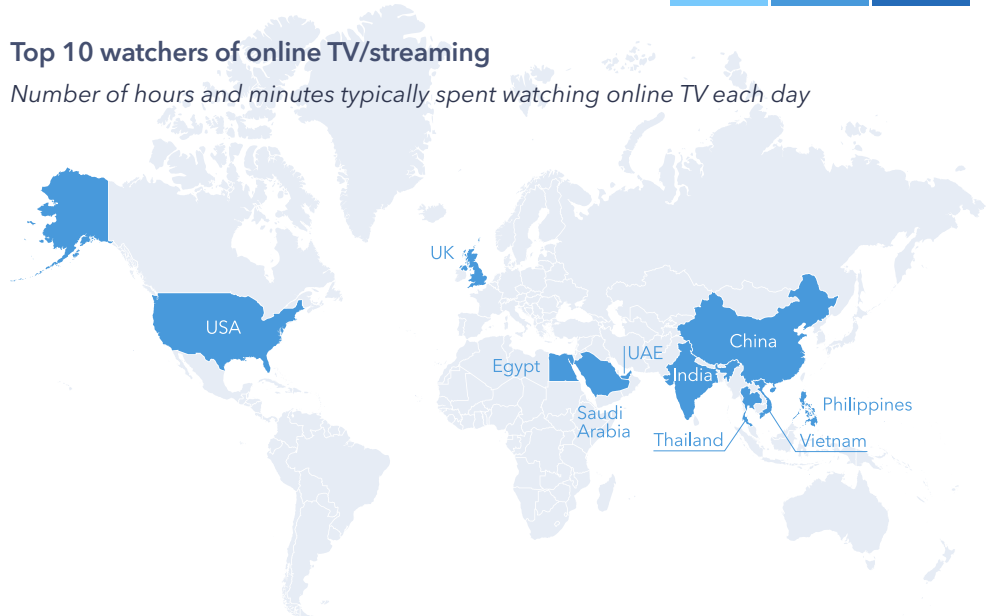
Number of hours and minutes typically spent watching linear TV each day



	LINEAR TV	DIFFERENCE VS ONLINE
USA	02:55	+01:35
Romania	02:39	+01:45
UK	02:36	+01:29
France	02:31	+02:02
Brazil	02:28	+01:22
Argentina	02:20	+01:27
Colombia	02:19	+01:25
Philippines	02:18	+01:03
Poland	02:17	+01:29
Italy	02:16	+01:35

Top 10 watchers of online TV/streaming

Number of hours and minutes typically spent watching online TV each day



	ONLINE TV/ STREAMING	DIFFERENCE VS LINEAR
Thailand	01:39	-01:52
Saudi Arabia	01:28	-00:27
China	01:28	+00:17
USA	01:20	-01:35
India	01:19	-00:20
Egypt	01:17	-00:33
Philippines	01:15	-01:03
UAE	01:12	-00:11
Vietnam	01:11	-00:09
UK	01:07	-01:29



Question: Roughly how many hours do you spend watching television/online forms of television during a typical day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Linear TV vs online TV

Comparing linear vs online viewing behaviors in 2016 is perhaps the best way to illustrate how dominant the former remains; **linear remains ahead in all 40 out of 41 of our markets**, and in 33 it exceeds the time spent on online TV by more than 50%.

The U.S.A, Romania and UK are the most enthusiastic watchers of linear TV: everyday they spend more than 1.5 hours longer watching this than online TV. At the other end of the spectrum, **online TV has surpassed linear TV by 17 minutes per day in China**. We expect the UAE and Vietnam to be next in line for this landmark.

Some of the largest linear TV markets have devoted TV audiences who demand content across formats, while others see time spent predominantly on one or the other. Interestingly, the U.S.A is one of the leading watchers of online TV (4th), but it's also one of the markets where we see the greatest disparity with linear (more than 1.5 hours) - this is a testament to the centrality of TV in the U.S. media landscape.

Fast-growth markets are where we're closest to seeing online TV close the gap on broadcast. In part, that's being driven by usage of VPNs as a way to access better entertainment content. Globally, **half of internet users say they have accessed the web via one of these tools**, with 15% of online adults (and 51% of VPN users) reporting that they have done this in order to get better entertainment content.

This behavior is much more prominent in fast-growth markets, with 20% or more of internet users in Malaysia, Indonesia, Thailand and India now using VPNs to find better shows. It's hardly a coincidence that it's in this type of market where home-grown on-demand or over-the-top streaming services tend to be less widespread/developed and where global providers like Netflix have the weakest presence.

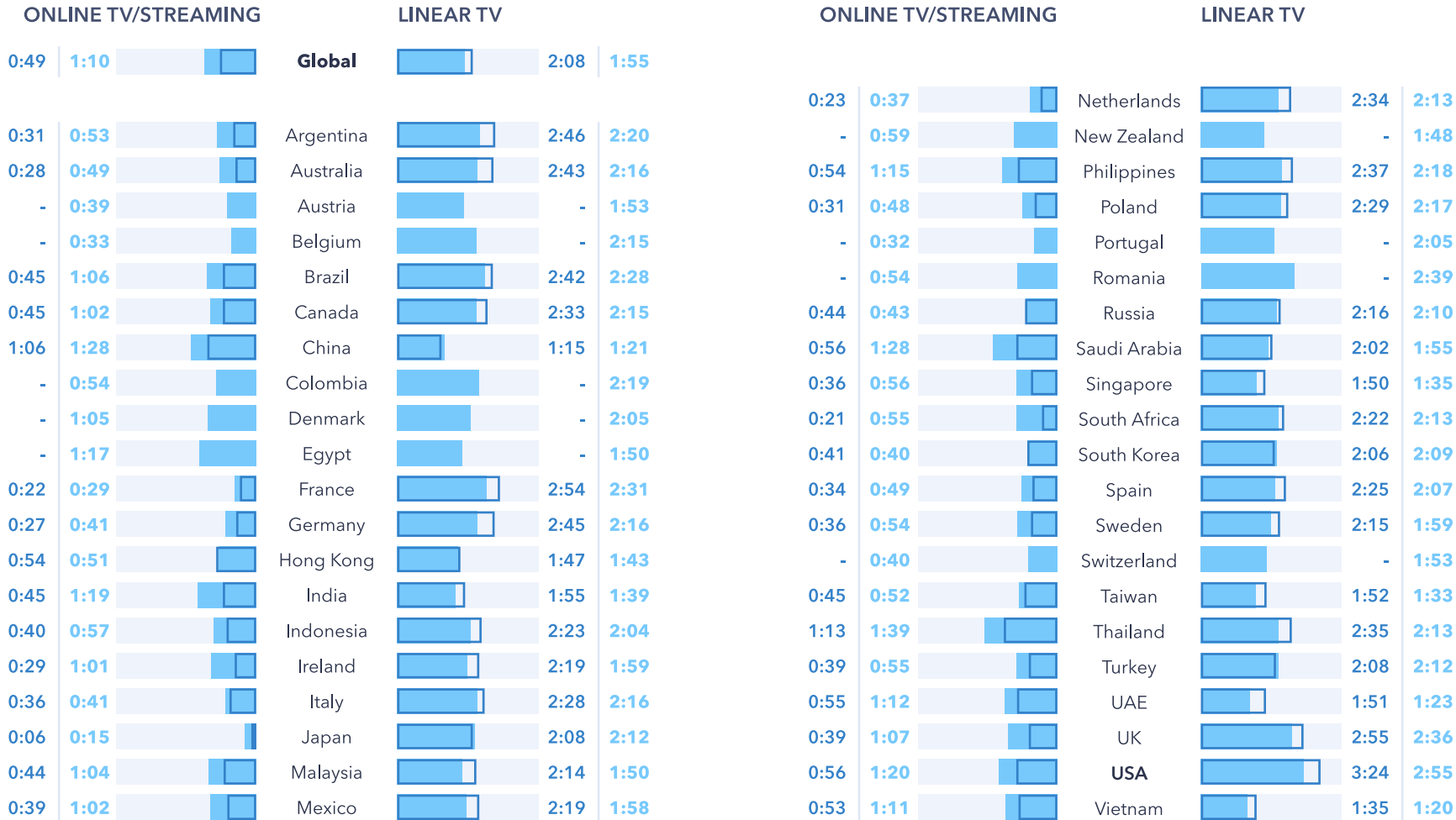
Of the 32 markets where we can compare linear TV consumption in 2014 and 2018, daily viewing has declined in 29 of them (increasing very slightly in China, Turkey, South Korea and Japan). Across most markets, these declines have been more rapid than we saw between 2012 and 2016, the last tracked period. TV lost almost half an hour per day in its top markets, whereas increased were on average just 5 minutes. The U.S. saw the largest single decline, followed by Germany, UAE, Australia and Argentina. The tides are turning against TV at a faster pace.

Just three markets saw time spent on online TV drop: Russia, South Korea and Hong Kong. In 30 others, internet users spent an average of 19 minutes more, ranging from 34 more minutes in South Africa to 5 in Italy. **In the case of China, the increase was enough to tip linear TV off its first place.**

Linear TV vs online TV

Linear TV vs online TV/streaming

Number of hours and minutes typically spent watching linear TV and online TV each day ○ 2014 ● 2018

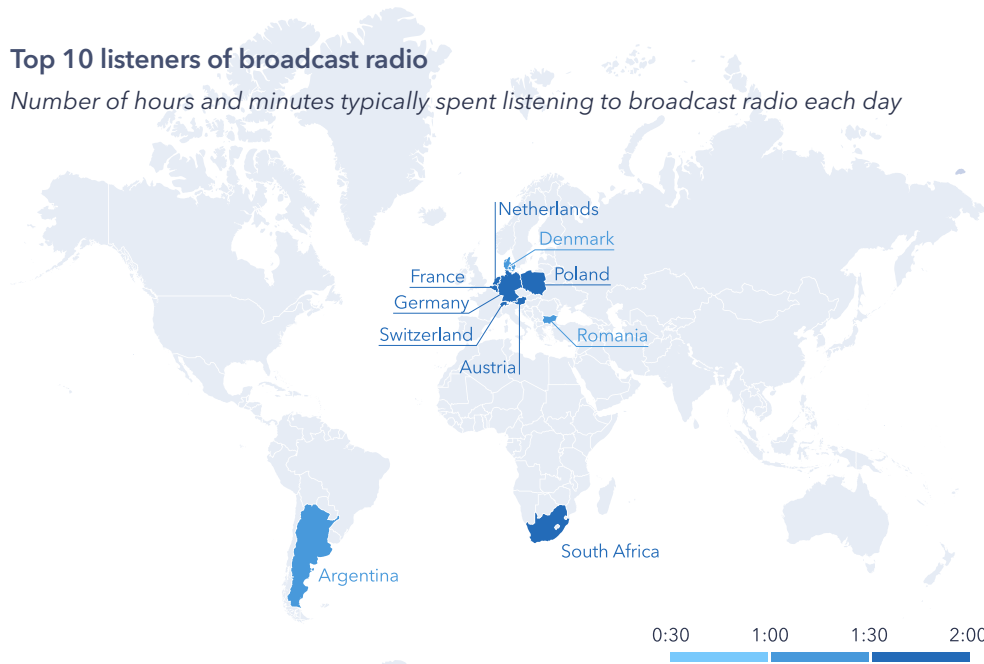


Question: Roughly how many hours do you spend watching television/online forms of television during a typical day?
Source: GlobalWebIndex 2014 & 2018 (averages of all research waves conducted in each year) **Base:** 168,045 (2014) & 391,130 (2018) Internet Users aged 16-64

Broadcast radio vs online radio/music streaming

Top 10 listeners of broadcast radio

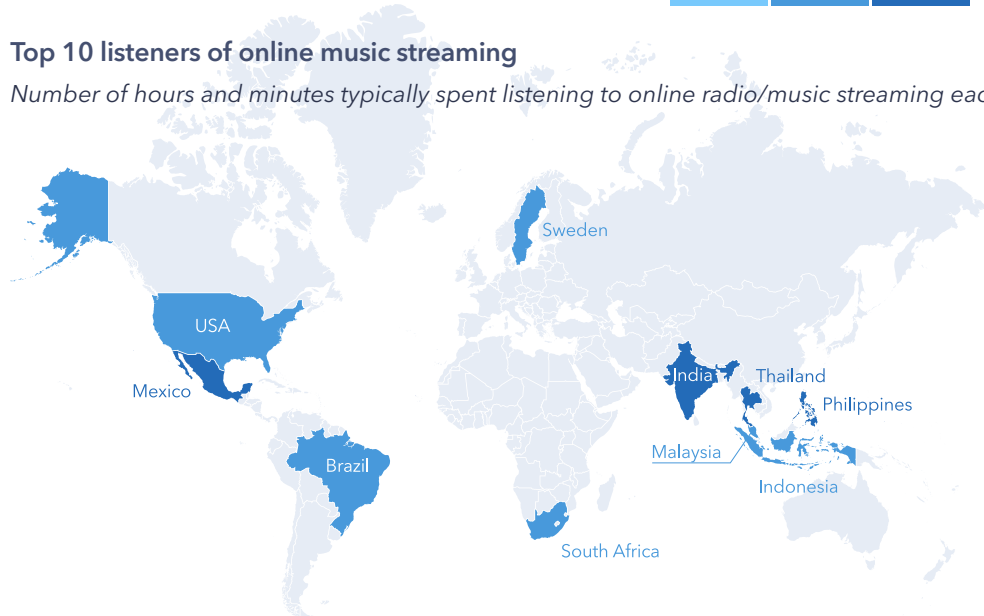
Number of hours and minutes typically spent listening to broadcast radio each day



	LINEAR TV	DIFFERENCE VS STREAMING
Poland	01:54	+00:56
Netherlands	01:48	+01:01
Belgium	01:47	+01:08
Austria	01:44	+01:07
South Africa	01:40	+00:20
Switzerland	01:35	+00:50
Germany	01:32	+00:54
Argentina	01:24	+00:07
Denmark	01:24	+00:17
Romania	01:24	+00:17

Top 10 listeners of online music streaming

Number of hours and minutes typically spent listening to online radio/music streaming each day



	ONLINE TV/ STREAMING	DIFFERENCE VS BROADCAST
Philippines	01:59	+01:07
India	01:34	+00:51
Mexico	01:32	+00:33
Thailand	01:31	+00:44
USA	01:29	+00:15
Sweden	01:27	+00:12
Indonesia	01:26	+00:43
Brazil	01:25	+00:20
South Africa	01:20	-00:20
Malaysia	01:20	+00:13



Question: Roughly how many hours do you spend listening to the radio/to online radio each day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Broadcast radio vs online radio/music streaming

Since tracking began, music streaming has risen to become one of the most popular global media overall, surpassing broadcast radio in 19 out of 22 markets tracked. The Philippines, India and Mexico lead in music streaming and have each added approximately an hour compared to where online radio was in 2014 in terms of time spent.

Whereas online radio only passed the one hour per day mark in 2014, 25 markets now spend that or more streaming music online. In contrast, the top listeners of broadcast radio are generally mature markets – and specifically in continental Europe, where internet users often spent a full hour longer on broadcast radio than music streaming.

South Africa, with its uniquely broad and regionalized radio market, stands out in this field with the 5th highest level of radio consumption despite its relatively young online population.

Broadcast forms of radio have lost ground in 23 of the 32 markets where we have trended data available. In the remaining countries, only China has seen any notable increase in time spent (18 minutes). Otherwise, the situation is essentially stagnant.

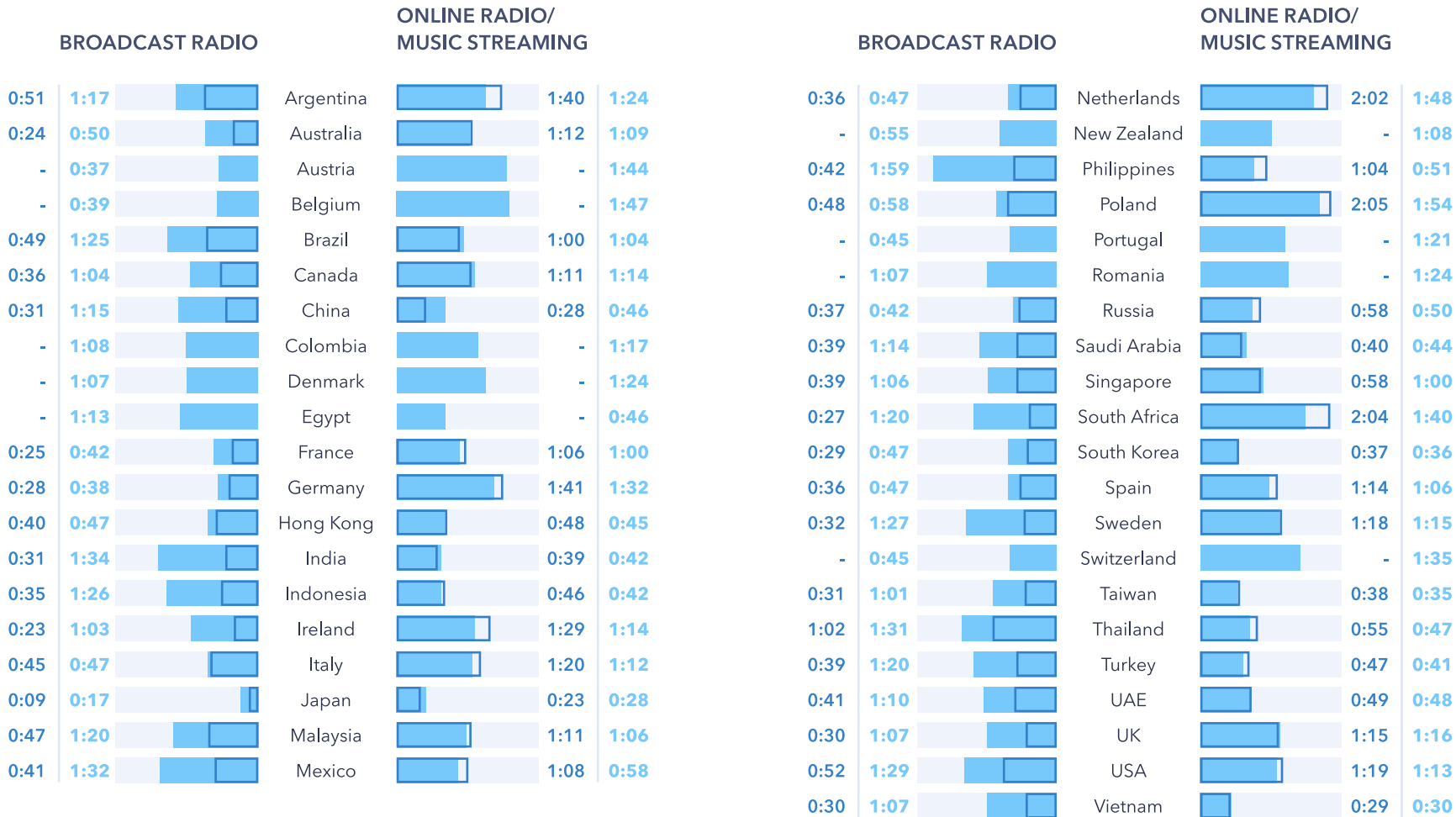
South Africa saw the largest drop in radio consumption – 24 minutes – albeit from a globally high level. In 8 markets, the drop is less than 5 minutes. Compared to the last compared period (2014-2016), online music streaming has increased dramatically and exceeded online radio's performance almost across the board.

Broadcast radio vs online radio/music streaming

Broadcast radio vs online radio/music streaming

Number of hours and minutes typically spent listening to broadcast radio an online radio/music streaming services

○ 2014 ● 2018



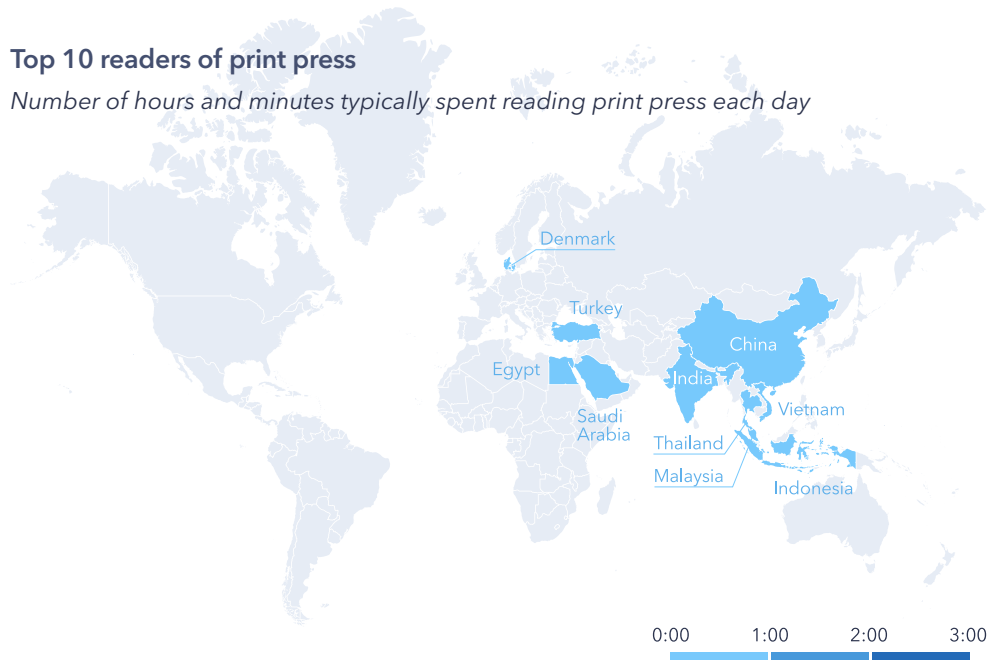
Question: Roughly how many hours do you spend listening to the radio/to online radio each day?

Source: GlobalWebIndex 2014 & 2018 (averages of all research waves conducted in each year) **Base:** 168,045 (2014) & 391,130 (2018) Internet Users aged 16-64

Print vs online press

Top 10 readers of print press

Number of hours and minutes typically spent reading print press each day



	PRINT PRESS	DIFFERENCE VS ONLINE
China	00:58	-00:06
Thailand	00:51	-00:53
India	00:48	-00:12
Denmark	00:47	-00:39
Saudi Arabia	00:47	-00:12
Egypt	00:43	-00:29
Turkey	00:43	-00:07
Vietnam	00:43	-00:16
Indonesia	00:42	-00:43
Malaysia	00:42	-00:12

Top 10 readers of online press

Number of hours and minutes typically spent reading online press each day



	ONLINE PRESS	DIFFERENCE VS PRINT
Brazil	02:10	+01:31
Thailand	01:44	+00:53
Saudi Arabia	01:26	+00:39
Egypt	01:25	+00:42
Indonesia	01:16	+00:34
Vietnam	01:12	+00:29
China	01:04	+00:06
India	01:00	+00:12
Denmark	00:59	+00:12
Argentina	00:59	+00:31



Question: Roughly how many hours do you spend reading physical/printed or online forms of press during a typical day?
Source: GlobalWebIndex 2018
Base: 391,130 Internet Users aged 16-64

Print vs online press

Whereas online forms of television and radio are generally lagging behind their linear counterparts, the opposite is true for press.

In all but two markets, online is now the preferred choice for this type of media. And even in those markets where print forms retain a lead – Japan and Portugal – the margins are very narrow, less than 5 minutes.

Broadly speaking, it's fast-growth markets where online press has made the biggest headway. Brazil marks itself out as the biggest reader of online press – where internet users are spending over 1.5 hours longer engaging with online press than printed forms.

Thailand then takes a strong second place, followed by Vietnam. **The rise of mobiles has undoubtedly had a positive impact on online press**, with consumers now able to keep up with the news whenever and wherever they please. Two-thirds of internet users report using a news app on their mobiles, for example, with notable peaks in many fast-growth markets (e.g. 89% in Vietnam). 4 in 10 have used a dedicated news app on their phones, ranging from 55% in Vietnam to 30% in Australia.

China has the largest print press consumption in the markets tracked, with nearly an hour spent every day. As with TV, there are markets where overall high demand for the content type, e.g. entertainment, boosts time spent on both traditional and digital platforms. Thailand, for instance, has both the second-highest online press and print press consumption. In others there'll be a strong preference for one or the other, e.g. Brazil.

This speaks to the importance of understanding local media contexts and avoiding broad generalizations, even for markets at similar income and internet penetration levels.

There are just 8 markets where either genre manages to hold the attention of consumers for more than an hour each day (with Thailand the only example for printed press). This shows that dedicated press **is now a relatively minor part of daily media consumption behaviors** – at least when it's compared to activities like TV and social networking, where people can access the same or similar content.

That many networks have been working to incorporate news stories within their sites is a key part of this. 40% of online adults now say that they use social networks to stay up-to-date with news/current events, and Twitter in particular has set itself apart as a vital go-to for news updates. In fact, reading a news story is the most popular activity on Twitter among the 20 or so tracked.

Important to note, however, is that **print press has remained fairly stable since 2014**. Although gentle declines have been seen in the majority of countries, these have been in the order of minutes. Traditional newspapers and magazines aren't being abandoned yet.

It should be of greater concern to publishers that some markets, e.g. Hong Kong, South Korea, Spain, Italy, and Russia, where demographics favor traditional media, have seen larger drops. They've however also seen declines even in online news consumption, suggesting a market-wide effect that isn't specific to any medium.

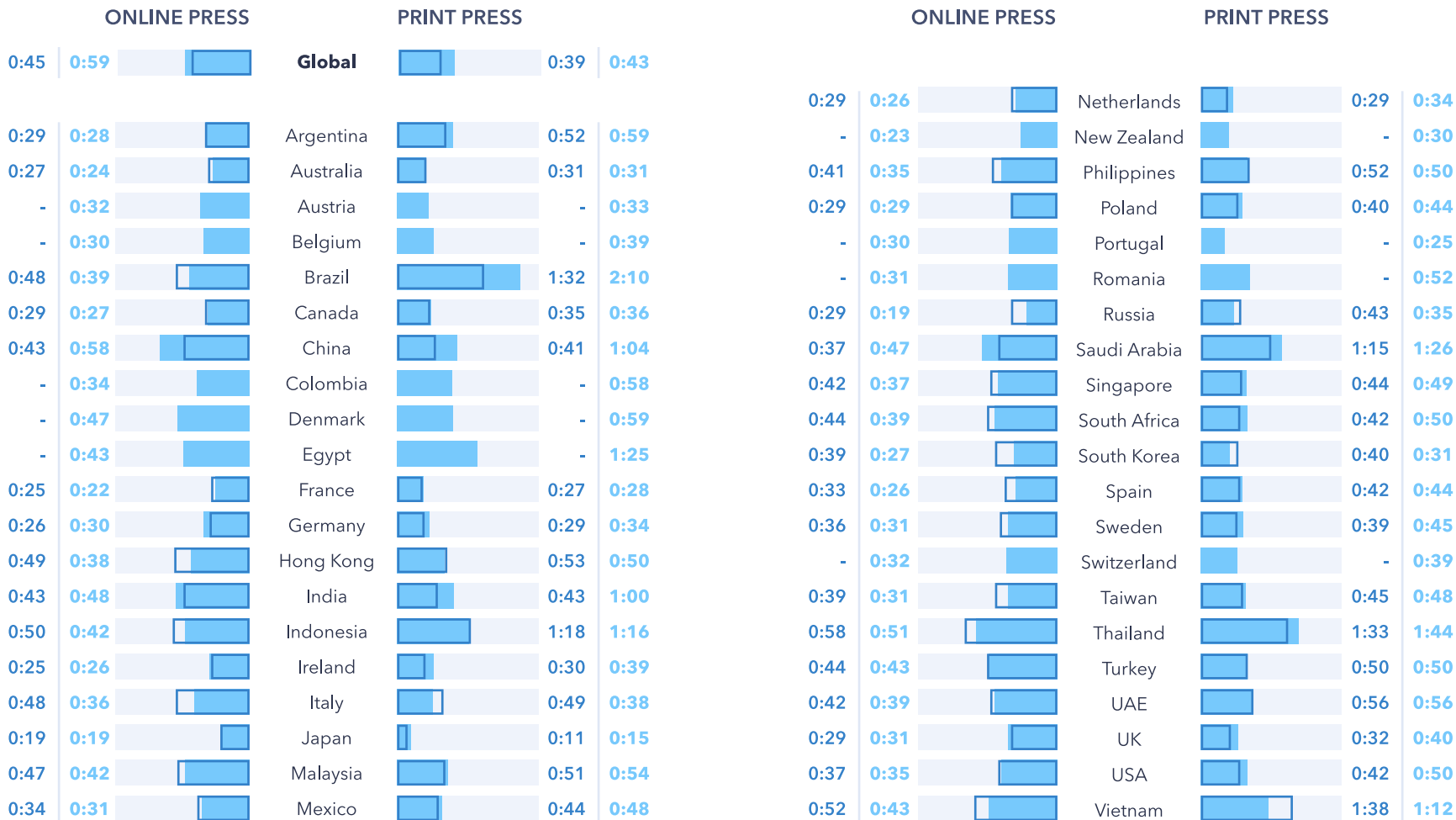
The average decline in time spent on traditional press has been 15% and the average increase on online has been 19%, so there is a moderately paced transition happening.

Print vs online press

Online vs print press

Number of hours and minutes typically spent reading online/print press each day

○ 2014 ● 2018



Question: Roughly how many hours do you spend reading physical/printed or online forms of press during a typical day?
Source: GlobalWebIndex 2014 & 2018 (averages of all research waves conducted in each year) **Base:** 168,045 (2014) & 391,130 (2018) Internet Users aged 16-64

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 550,000 internet users aged 16-64. 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 GWI 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.

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**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's 2018 waves of research across 41 countries, with a global sample of 391,130 respondents. The sample by market breaks down as follows:

Argentina	6,256	Netherlands	5,167
Australia	10,938	New Zealand	5,128
Austria	5,180	Philippines	6,327
Belgium	5,122	Poland	7,306
Brazil	9,370	Portugal	5,155
Canada	9,142	Romania	1,307
China	61,554	Russia	9,073
Colombia	4,097	Saudi Arabia	5,721
Denmark	3,885	Singapore	10,313
France	15,039	South Korea	5,107
Germany	13,776	Spain	13,675
Hong Kong	7,263	Sweden	5,155
India	19,880	Switzerland	5,073
Indonesia	7,093	Taiwan	7,200
Ireland	5,000	Thailand	6,125
Italy	13,701	Turkey	6,395
Japan	7,126	UAE	7,088
Malaysia	6,222	UK	33,589
Mexico	10,515	USA	72,936
		Vietnam	6,394

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

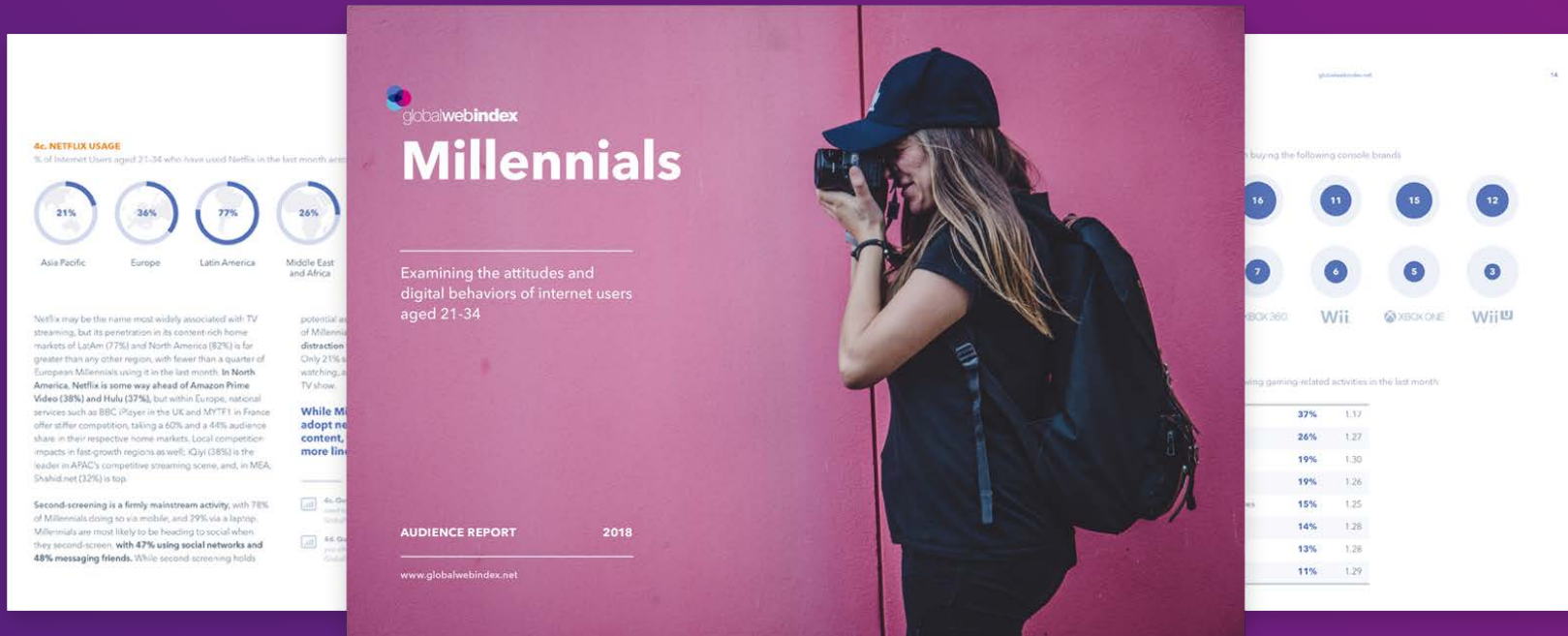
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

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.

Internet Penetration Rates

GlobalWebIndex's Forecasts for 2018 based on 2016 ITU data

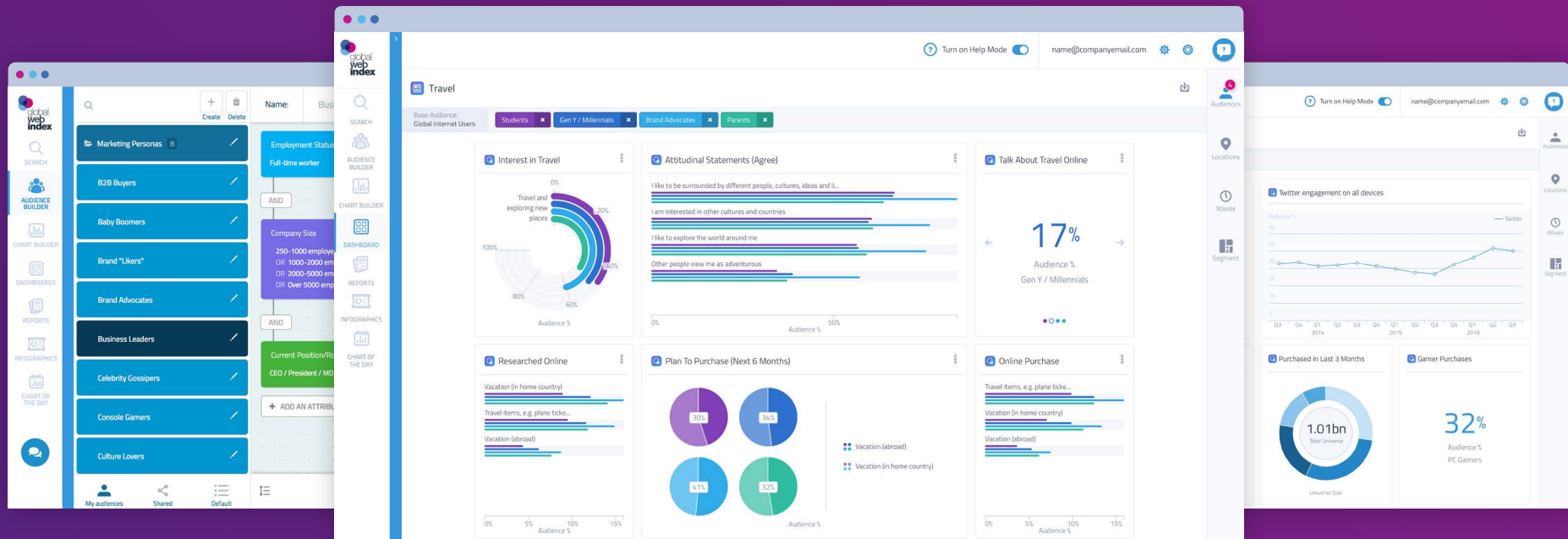
Argentina	77%	Indonesia	33%	Russia	81%
Australia	90%	Ireland	84%	Saudi Arabia	81%
Austria	86%	Italy	62%	Singapore	84%
Belgium	89%	Japan	96%	South Africa	61%
Brazil	66%	Kenya	38%	South Korea	94%
Canada	92%	Malaysia	81%	Spain	85%
China	58%	Mexico	70%	Sweden	89%
Colombia	62%	Morocco	59%	Switzerland	91%
Denmark	98%	Netherlands	90%	Taiwan	81%
Egypt	45%	New Zealand	92%	Thailand	58%
France	88%	Nigeria	33%	Turkey	64%
Germany	92%	Philippines	61%	UAE	93%
Ghana	46%	Poland	77%	UK	96%
Hong Kong	92%	Portugal	75%	USA	79%
India	40%	Romania	66%	Vietnam	51%



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