globalwebindex

Health & Wellbeing in the Digital Era

Examining how digital consumer habits are changing in a health-obsessed landscape

TREND REPORT 2019

www.globalwebindex.com

Contents

Introduction

GlobalWebIndex Trend reports take a deep-dive into the crucial topics of the industry. In this report, we focus on health and wellbeing.

This report explores:

- **The Global Health Landscape** – why is health and wellbeing touted as a major theme for 2019?
- **Health Conditions and Health-Conscious Consumers** – what is the demographic profile of a) people with health conditions and b) health-conscious consumers? How do they overlap?
- **Health-Conscious Behaviors** – what are the regional and demographic differences in sport participation, exercise frequency and food and drink purchasing?
- **Wellbeing in the Digital World** – what are brands doing to help increase consumers' 'digital wellbeing'?
- **Health Brand Engagement** – which healthcare, personal care and sports brands have the highest engagement with online consumers?

Key Insights

Over one third (37%) of online global respondents can be categorized as health-conscious consumers, which is skewed slightly towards higher-income, educated 16-34-year-old females. Because of Latin America's relatively lower internet penetration rates – meaning respondents tend to be younger, and more urban, affluent and educated – this region has higher rates of health-conscious consumers compared to Europe and North America.

Over three quarters (77%) of all online consumers say that they do some form of exercise at least once a week. Our data indicates that male respondents are more likely to claim they go to the gym, go running or do some other form of exercise once a week, and 25-34-year-olds are typically the most conscious of their health. Just under half of this demographic (44%) say that they go to a gym at least once a week.

A third of online consumers from North America have purchased vitamins/supplements in the last month; this demographic are 36% more likely than the average consumer to have bought vitamins/supplements online in the same time period.

The fitness-based app market has seen dramatic growth over the past years. **More than a fifth of all online consumers use health and fitness apps on a monthly basis.** This figure remains consistent across age groups, only dropping to 14% of 55-64-year-olds.

While consumers with at least two health conditions we track are more likely to have purchased vitamins and supplements in the past month (Index 1.62), **they also over-index for drinking alcohol (Index 1.26) and eating fast food (Index 1.12) on a weekly basis.**

Health & Wellbeing in the Digital Era

The Global Health Landscape

Trend Report 2019

The Global Health Landscape

Consumers are taking advantage of their access to extraordinary amounts of information surrounding their health and wellbeing to become more discerning and informed about what they consume, the brands they buy and how they live their lives. Many people are increasingly willing to self-manage their health, empowering themselves to become healthier and happier.

More engaged and savvy consumers are exerting greater influence on health systems and products, driving new trends such as augmented reality in medical training, patient personalization, wearable tech and self-diagnoses using smart devices.

High-income countries are having to deal with an increasingly aging population. With one-fifth of the global population **predicted to be over the age of 60 by 2050**, we are facing a multitude of new challenges around how we manage the health and care of the elderly. Health issues which correlate with increasing age, such as non-communicable diseases, mental health conditions and certain types of cancer, are becoming more prevalent.

The changing consumer

Around the world, we also tend to 'work hard, play hard', and three in four of us have felt so stressed in the last year, we've felt 'overwhelmed' or 'unable to cope' according to the **Mental Health Foundation**.

According to the World Health Organization, **worldwide obesity has nearly tripled since 1975**. In 2016, more than 1.9 billion adults, 18 years and older, were overweight, with 650 million of these individuals being categorized as obese.

Growing unease about personal health and desire for more natural and environmentally friendly lifestyles is fueling interest in new dietary regimens and lifestyles. Ketogenic, gluten-free, high-fat, low-carb are just some of the diets that have become popular in recent years.

But it's 'elimination' based diets such as veganism that take the prize. From a niche movement within vegetarianism, veganism is now attracting broader and broader audiences whether for the health benefits that the diet can provide or for the positive impact it has on climate change at an individual level. Celebrity endorsements and **high-profile campaigns** both drive and reflect these shifts, with **Beyoncé** inviting her 112 million followers on Instagram to join her in the vegan journey.

The Global Health Landscape

'We all have a responsibility to stand up for our health and the health of the planet. Let's take this stand together. Let's spread the truth. Let's make this mission a movement.'

– Beyoncé and Jay-Z

Record numbers have signed up to '**Veganuary**', with vegan options becoming cheaper, more widespread and convenient. Many regard 2018 as the year that veganism moved out of the realms of counter-culture and into the mainstream. Alternative medicines, such as herbal remedies, specialty diets and homeopathic therapies, **are also on the rise**.

This is a prime example of consumers becoming more empowered to understand how their bodies work and how best to complement their lifestyle through their diet and medication.

Consumers now want solutions that complement their personal health needs. Younger consumers in particular are leading the charge by making health-promoting diet and lifestyle choices, but baby boomers also seem to be more engaged in their quest for good health, active retirement, longevity and independence.

The greater sense of individual responsibility for one's health is driving an increased consumer demand for personal healthcare products. For example, **23andMe** uses saliva samples to provide insights into an individual's genetic health risks, carrier status, traits, wellness and ancestry, as of January 2019, available at mainstream chains such as Boots in the UK.

There are huge opportunities for retailers and food manufacturers to capitalize on this health-oriented movement by providing new products and technology that offer consumers tailored solutions based on their individual needs. These solutions are allowing people to attain a new level of lifestyle, holistically driven by health and wellness.

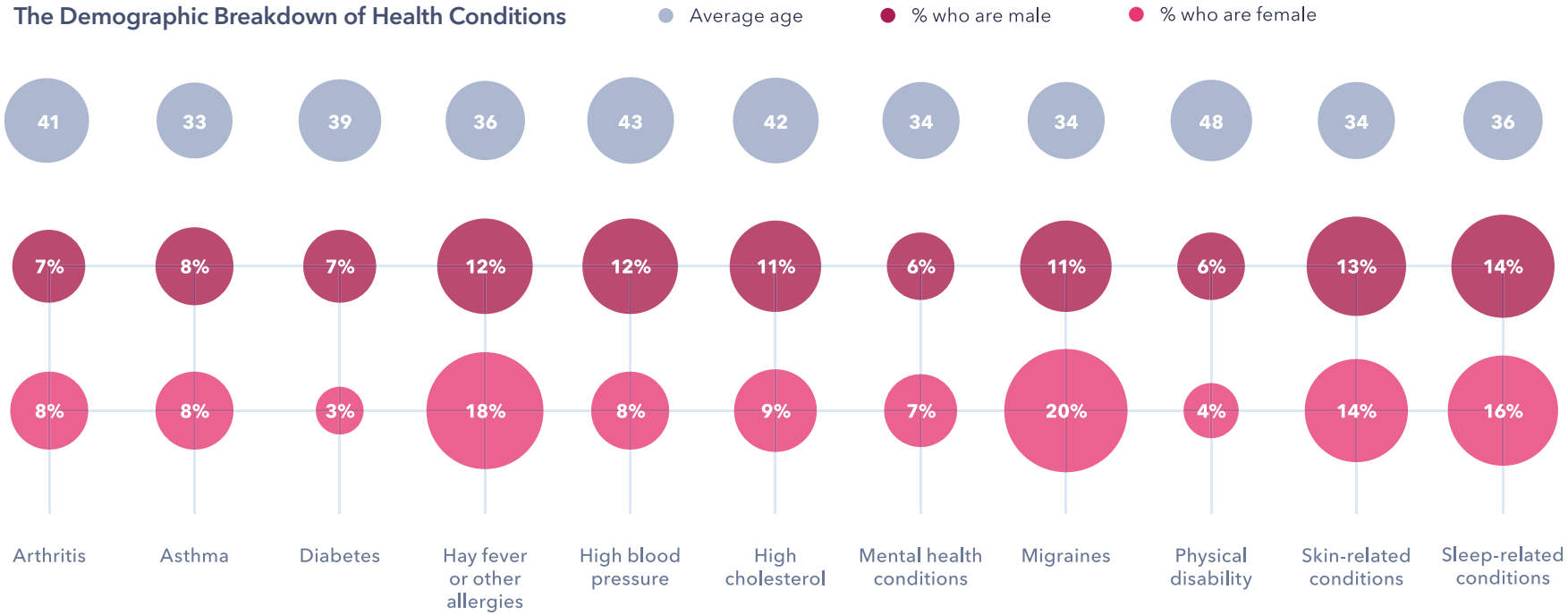
Health & Wellbeing in the Digital Era

Wellbeing Attitudes & Demographics

Trend Report 2019

Health Conditions

The Demographic Breakdown of Health Conditions



* health conditions data refers to 18-64 year-olds only

Respondents from North America are **1.9x more likely** than the average online consumer to say they have at least three of the eleven health conditions we track

59% of all online respondents say that someone in their household has at least one of the eleven health conditions we currently track; 44% has someone in their household with at least two

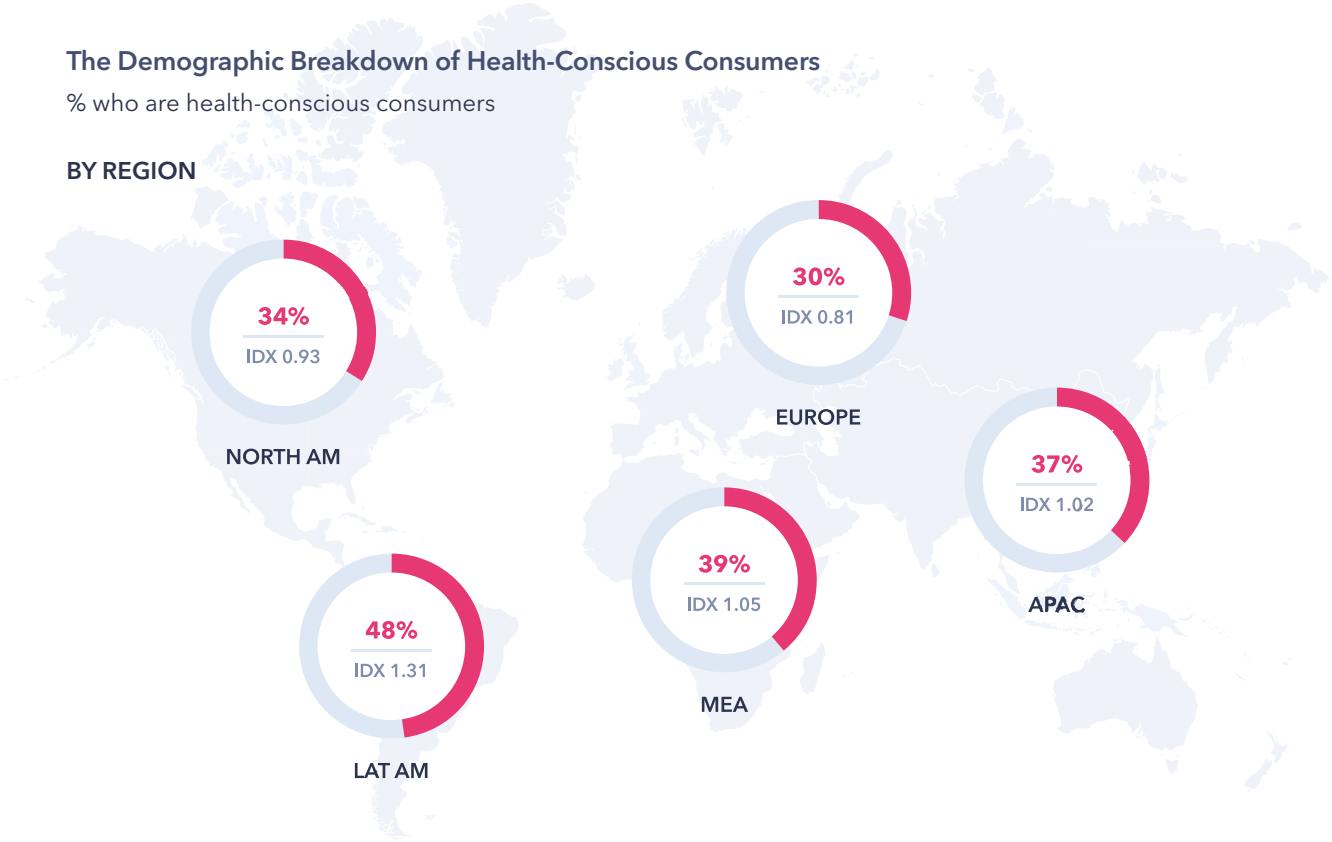
Question: Do you personally, or does anyone in your household, currently have any of the following conditions? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Health-Conscious Consumers

The Demographic Breakdown of Health-Conscious Consumers

% who are health-conscious consumers

BY REGION



TOP 5 COUNTRIES

		INDEX
Colombia	60%	1.62
Mexico	53%	1.44
India	49%	1.34
Philippines	48%	1.31
Thailand	47%	1.27

Health-conscious consumers are **1.3x more likely** to agree they are a brand conscious person (62% say this)

Demographics

The global wellness market has grown 12.8% in the last two years, transforming it into a **$4.2 trillion industry**.

We define health-conscious consumers by their attitudinal preference for looking after and challenging themselves, their propensity to buy natural and organic products, as well as being a health, fitness and beauty enthusiast that frequently does some form of exercise.

More than a third (37%) of all respondents fit into this definition, which is skewed slightly towards higher-income, educated 16-34-year-old females. Latin America has relatively fewer internet users, so respondents tend to be younger, and more urban, affluent and educated. As a result, this region has higher rates of health-conscious consumers compared to Europe and North America, despite their lower average age.

Question: World regions (this data is auto-generated based on country)
Source: GlobalWebIndex Q3 2018 **Base:** 32,988 Health-Conscious Consumers aged 16-64

Health-Conscious Consumers

The Demographic Breakdown of Health-Conscious Consumers

% who are health-conscious consumers

BY AGE

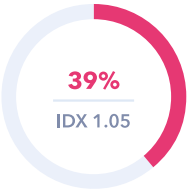
		IDX
16 to 24	41%	1.10
25 to 34	40%	1.10
35 to 44	35%	0.95
45 to 54	31%	0.86
55 to 64	26%	0.72

BY INCOME GROUP

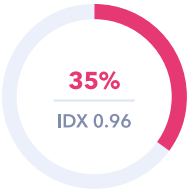
		IDX
Top 10%*	45%	1.23
Top 25%	42%	1.15
Mid 50%	39%	1.06
Bottom 25%	31%	0.84
Prefer not to say	29%	0.80

* Top 10% is a sub-segment of the Top 25% group

BY GENDER



FEMALE



MALE

BY EDUCATION

		IDX
Schooling until age 16	25%	0.67
Schooling until age 18	33%	0.89
Trade/technical school/college	37%	1.01
University degree	43%	1.16
Postgraduate degree	51%	1.39

Health-Conscious Consumer | Definition Breakdown

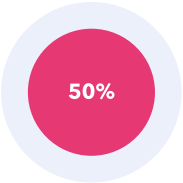
37% Health-conscious Consumers

32,988 RESPONSES

ATTITUDES

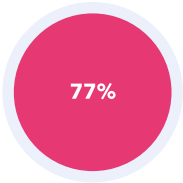
I like to challenge and push myself to be the best I can be	69%
I look after my appearance/image	69%
I try to buy natural/organic products	60%

INTERESTS



Health, Fitness & Beauty Enthusiasts

BEHAVIOR



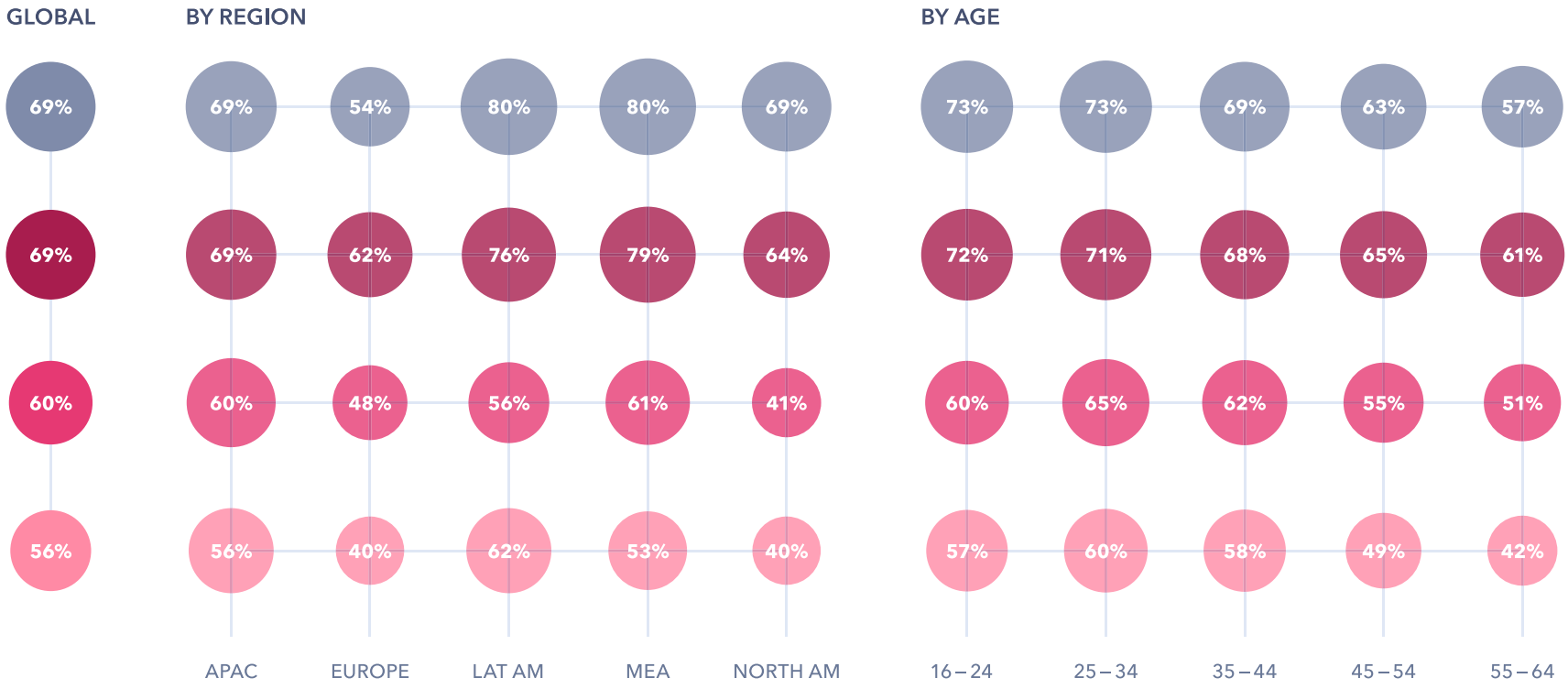
Weekly exercise

Question: Please tell us your gender / How old are you? / This data is auto-generated based on the household income question (note that respondents inside the Top 10% are included in the Top 25% group too)
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Health-Conscious Consumers

Health-Related Self-Perceptions

% who agree with the following statements



- I like to challenge and push myself to be the best I can be
- I look after my appearance / image
- I try to buy natural / organic products
- I would pay more for sustainable / eco-friendly products

1 in 2 respondents who have at least one health condition are categorized as health-conscious consumers

Question: To what extent do you either agree or strongly agree with the statements below? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Health & Wellbeing in the Digital Era

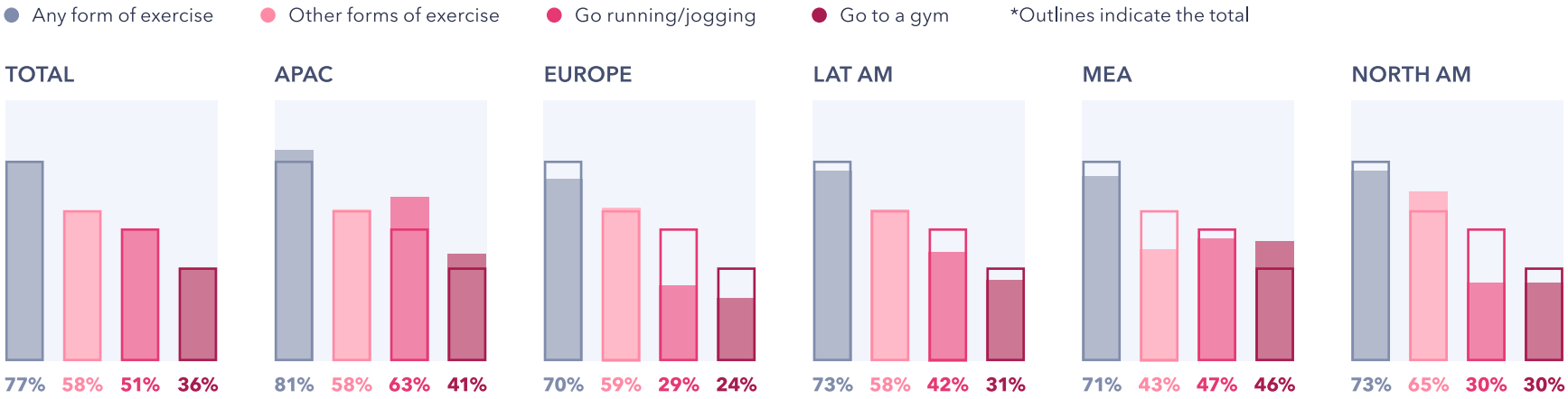
Health-Conscious Behaviors

Trend Report 2019

Health & Wellbeing Behaviors

Regional Differences in Exercise Frequency

% who say they do the following at least once a week



Exercise and Sport Participation

More than three quarters (77%) of all online consumers say that they do some form of exercise at least once a week. Our data indicates that male respondents are more likely to claim they go to the gym, go running or do some other form of exercise once a week. Just under half of 25-34-year-olds say that they go to a gym at least once a week.

Respondents from the APAC region are 23% more likely than the average consumer to say that they go running or jogging at least weekly: more than 6 in 10 do. This is more than double the rate in Europe and North America, although many respondents in these regions do say that they do other forms of exercise outside of running and going to the gym. APAC is a region **known for its high-stress rates** that are a result of many things combined – work, living conditions, and fast-paced lifestyles – which may be encouraging consumers to embrace new lifestyles and fitness routines to help them achieve more balanced health solutions.

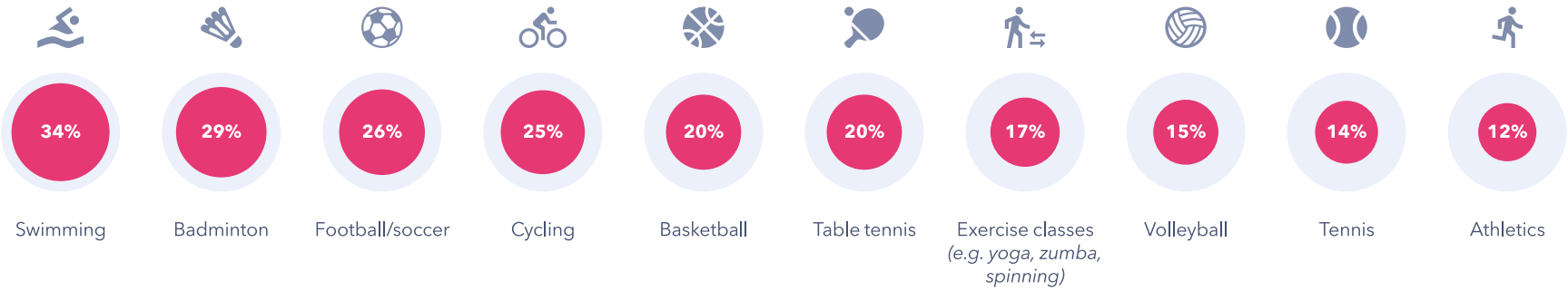
8 in 10 online respondents say that they do some form of exercise at least once a week

Question: How often do you typically do the following? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Health & Wellbeing Behaviors

Sport Participation

% who say they play or take part in the following sports



BY AGE

16 TO 24		25 TO 34		35 TO 44		45 TO 54		55 TO 64	
Badminton	37%	Swimming	39%	Swimming	33%	Swimming	28%	Swimming	24%
Swimming	37%	Badminton	33%	Badminton	25%	Badminton	19%	Cycling	15%
Football/soccer	33%	Football/soccer	32%	Football/soccer	25%	Cycling	18%	Table tennis	13%

> **63%** of respondents from APAC say they go running at least once a week, while only **29%** of respondents from Europe say the same

When it comes to specific sport participation, swimming takes the top spot with over a third of all online respondents saying they regularly swim. This finding is consistent across age groups; swimming is in the top two most popular sports in every age bracket we survey.

This does vary across regions, though. Swimming is the most popular sport in Europe and North America, badminton is the most played sport in APAC, and football/soccer the most popular in Latin America and the Middle East-Africa region.

Question: Which of these sports / sporting activities do you regularly play or take part in? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Food & Drink

The **global dietary supplements market** is expected to reach $278 billion by 2024, according to a report by Grand View Research. Rising obesity rates in developed economies due to fluctuating dieting patterns along with frantic work styles, is expected to boost spending on nutritional supplements. Vitamins and supplements are particularly popular in North America. A third of online consumers from North America have purchased vitamins/supplements in the last month – making them 36% more likely to do so than the average online consumer. For health-conscious consumers in North America, this rises to nearly 1 in 2 respondents (1.88 Index).

Health-conscious consumers with at least one health condition are 1.6x more likely to have bought vitamins/supplements in the past month

Consumers from Latin America are 1.5x more likely than the average consumer to have purchased health foods in the past month, with 1 in 2 claiming to do so compared to only 28% of respondents from Europe. According to the **2017 Edelman Earned Brand study** of 14,000 consumers, consumers in Latin America have higher expectations of food and beverage brands than the global average. They often seeking out healthy, sustainable and transparent food brands, which they believe can do more to solve social problems than their government.

6 in 10 online consumers say they try to buy natural/organic products, and 56% would pay more for sustainable/eco-friendly products

Health-conscious individuals that also have at least one of the health conditions we track are 1.6x more likely to have purchased vitamins and supplements in the last month, with 4 in 10 saying they have done so. 73% of this audience also say they would pay more for sustainable or eco-friendly products (Index 1.37), and they are 43% more likely than the average consumer to say they are a risk-taker. The latter in particular indicates that personal agency is especially important to health-conscious individuals with a health condition, so as not to let their condition or ailment define their lifestyle.

Nestle and Terrafertil eye Latin America's fledgling markets for plant-based foods

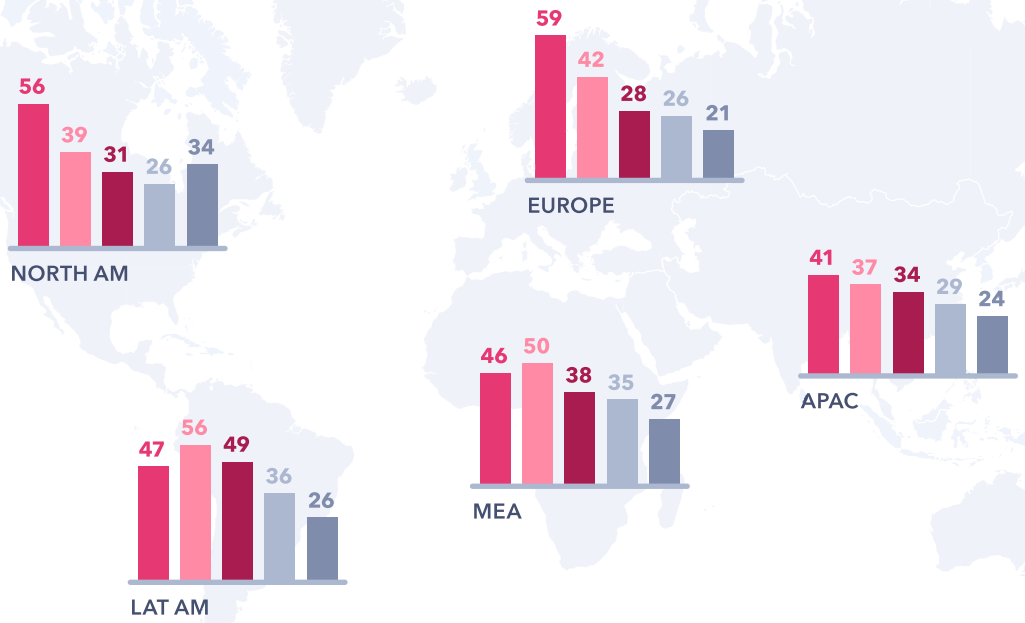
After a deal finalized in August, Nestle owns a majority stake in Latin American organic and plant-based business Terrafertil. *"From a Nestlé perspective, there is a clear interest in going where our consumers are going and the trend towards plant-based protein and plant-based foods, towards healthy snacking, is growing in Latin America,"* says Maxence de Royer, the vice president for strategy and business development at Nestlé's Mexican arm. *"In the region, these trends towards plant-based foods, superfoods, healthy snacking are clearly not fads. It is here for the long term. These categories in Latin America are lowly-penetrated but there is a huge opportunity to drive penetration."*

Food & Drink

Healthy Purchases

% who say they have purchased the following healthy grocery products in the last month

BY REGION



BY AGE

16-24	42%	40%	35%	28%	21%
25-34	46%	42%	37%	31%	27%
35-44	48%	41%	34%	30%	25%
45-54	50%	39%	30%	28%	26%
55-64	50%	39%	27%	26%	27%

- Bottled water
- Organic fruit/vegetables
- Health foods
- Fresh ready meals
- Vitamins/supplements

Respondents in North America are **36% more likely** than the average online consumer to have purchased vitamins and supplements

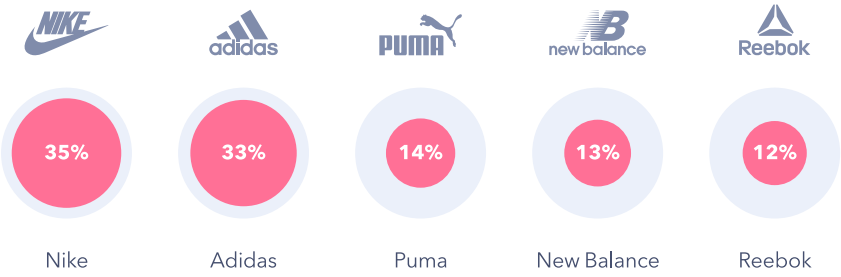
Question: Which of these products have you or your household purchased in the last month? Which of these items did you purchase online? Which of these items did you research online before purchasing? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sports Brands & Wearable Tech

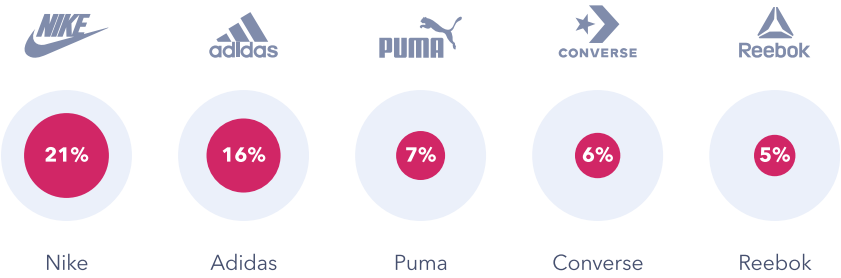
Nike Tops the Charts for Engagement and Advocacy

% who say they have bought from/would advocate for the following brands

ENGAGEMENT



ADVOCACY



> **21%** of consumers have used a health and fitness app within the past month

At the end of last year, Nike brought its **Nike App at Retail integration** to Nike stores around the world. By using the Nike App in stores, customers can access numerous features that have been created to streamline and augment the brick-and-mortar shopping experience. Through their smartphone, shoppers can reserve products, redeem NikePlus Instant Unlocks, and scan items for additional information.

21% of our online sample say they have used a health and fitness app in the past month, increasing to 37% for health-conscious consumers (Index 1.74)

The fitness-based app market has seen dramatic growth over the past years. Over a fifth of all online consumers use health and fitness apps on a monthly basis. This figure remains consistent across age groups, only dropping to 14% of 55-64-year-olds, revealing the pervasive uptake of health and fitness-integrated technology.

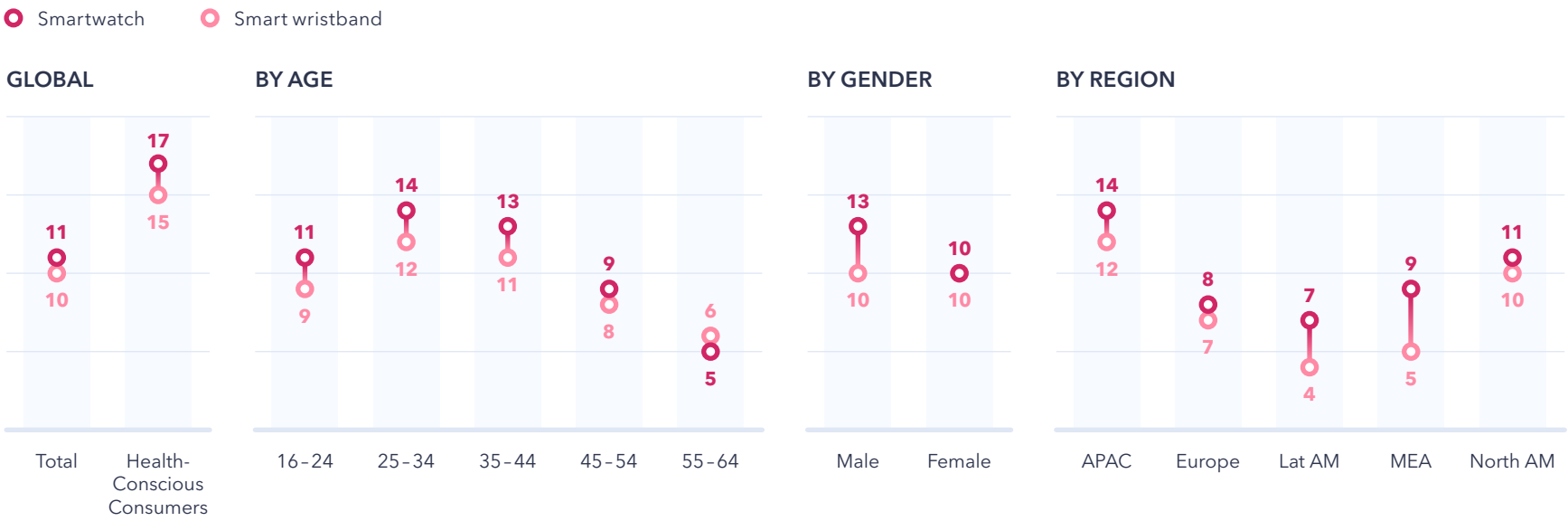
The ability of these apps to sync with wearables could help bolster consumer interest. Though it once seemed a luxury, wearable tech has now blossomed into a must-have accessory for a wide range of consumers. 2018 was the year that Apple launched the Series 4 Apple Watch, the latest in line up of wearable tech.

The continued synchronization between mobile apps and fitness-trackers could help wearables gain traction in the marketplace.

Question: Have you bought products from any of these sports brands? This could include clothing, shoes, sporting equipment or any other accessories / Which of these brands would you advocate to others (e.g. write / post positive reviews about, recommend to family / friends)?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sports Brands & Wearable Tech

Smart Wristband/Watch Ownership



In 2019, we could potentially see wearable tech move away from our wrists and sit on our bodies instead. Google's **Jacguard tech**, for example, is a system that makes the clothes you're wearing smarter, allowing consumers to fulfill some of the functions you'd normally associate with a smartwatch such as receiving calls and texts, navigating and playing music. Going forward, we can expect to see more focus on coaching and actionable information, more advanced metrics and continued development of sensors.

> **10%** currently own a smart wristband; this jumps to **17%** for health-conscious consumers

New research also suggests a big uptick in sales for smartwatches, which will be led by older users. Smartwatches in general are **expected to grow to 11.1% of all U.S. adults in 2019**. They are now seen as a key driver of all wearable tech and more than half of adult wearable tech users will use a smartwatch.

Wearable technology, like smartwatches, are now outfitted with a variety of health features, which industry leaders believe to be especially important to older consumers. The Apple Watch Series 4, for example, is equipped with enhancements such as electrocardiography (ECG) readings and fall-detection capabilities.

Question: Which of the following devices do you own? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

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Wellbeing in the Digital World

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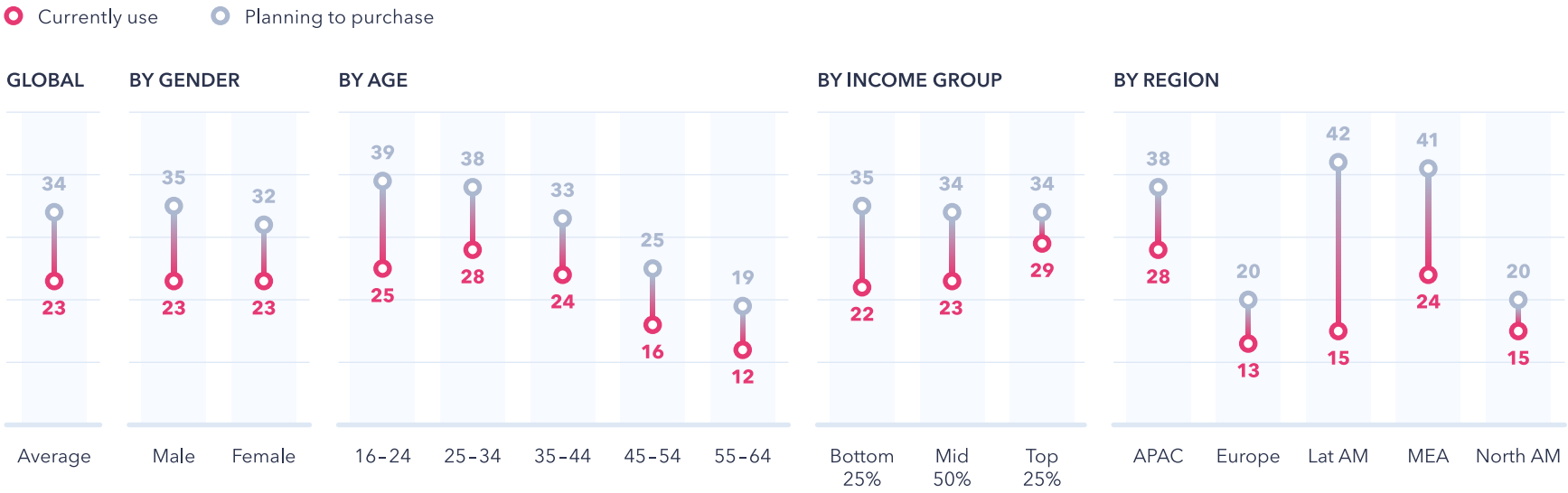
Wellbeing & Technology

Opportunities for Smart Health Device Brands



Digital wellbeing is the latest tech trend focused on helping individuals to understand how they use the tech around them and provide tips and techniques to establish healthy habits. Google, in particular, is at the forefront of this trend, making digital wellbeing tools a key component of its latest mobile operating software, Android 9.

To create the digital wellbeing features found in Android 9 and the Google Pixel 3 devices, Google's research team initiated a piece of research titled 'JOMO' – the joy of missing out. This research specifically looked at the problems that users were facing which came down to some main themes: not knowing where they were spending their time, being sucked in by specific apps, trouble sleeping, and finding it hard to disconnect.

Unlike Apple's screen time tools, which offer consumers a weekly digital wellbeing notification, Google doesn't see the benefit in showing consumers a defined number of how long people spend on their phones, as this figure is hugely dependent on context.

Question: Which of these products do you currently use at home? And which are you or your household planning to purchase in the next 6 months? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Wellbeing & Technology

When it comes to digital wellbeing, Google is only just getting started. Though the tools are only available on smartphones right now, these features could be applied to other Google products including the Pixelbook and Pixel Slate ranges, as well as the Google Home smart speakers.

Google's product manager for digital wellbeing Rose La Prairie's top tips for managing the relationship with your devices:

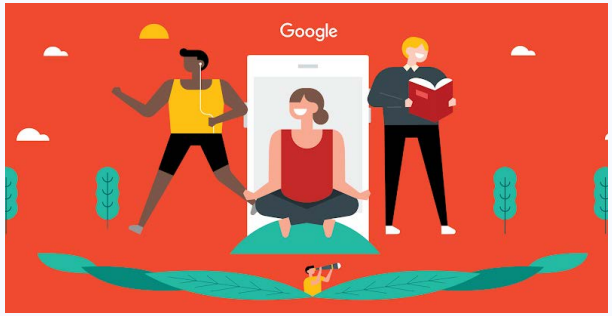
1. **Observe yourself:**
   Figure out how you use your device now and what you want to change.

2. **Put your devices to bed:**
   Set yourself a time to put all the devices down and start to wind down.

3. **Practice deep work:**
   Make like author Cal Newport and practice deep work, or focusing.

4. **Be present:**
   Be present with people and be conscious of that. If you're having dinner with friends, encourage each other to put the phones away.

Google Fit wants to help you fulfill your New Year's resolutions



Google's latest effort to help you maintain your activity levels is called the Google Fit 30-Day Challenge, which works with the Google Fit app for Android and Wear OS-powered smartwatches.

The goal is to reach 150 'Heart Points' per week, a figure that meets the American Heart Association and the World Health Organization's physical activity recommendations that have been demonstrated to reduce the risk of heart disease, as well as improve sleep quality and increase overall mental well-being.

Health & Wellbeing in the Digital Era

Brand Engagement

Trend Report 2019

Health & Wellbeing Brands

Beauty and Personal Care

Globally, Dove is the most popular personal care brand, based on weekly usage. While there are large gender differences in personal care brand preferences, such as male respondents citing Head & Shoulders and Gillette as their most used brands, other brands seem to effectively market to both males and females, namely Dove, Nivea and Pantene.

Gender Preferences for Personal Healthcare Brands

% who use the following haircare/skincare/cosmetic brands at least once a week

TOTAL		MALE		FEMALE	
Dove	30%	head & shoulders	34%	Dove	33%
head & shoulders	28%	Gillette	29%	L'ORÉAL	29%
NIVEA	25%	Dove	27%	NIVEA	26%
L'ORÉAL	24%	NIVEA	25%	PANTENE	25%
PANTENE	23%	PANTENE	22%	MAYBELLINE*	22%

The options marked with a * are gender-specific, being asked to female respondents only

Healthcare Brand Influencers

% who say the following things are very important when choosing which brand to buy

63%	44%	35%	28%	22%
Recommendations from a GP, Doctor or Pharmacist	Picking a brand of medicine I've used before	The cost of the medicine	Recommendations from friends, family or colleagues	Information or recommendations found online

Amazon set to use consumer data to send free samples as part of new ad strategy

Amazon is piloting a program to let brands like Maybelline and Folgers pay to send free samples based on what the retail giant knows individual consumers are likely to buy.

Turning free samples into new targeted ads plays to Amazon's strength as a trusted delivery service of everyday goods, in a bid to take on Google and Facebook's ad dominance. Amazon have the purchasing datas and logistics infrastructure to offer samples of actual products, which could have huge ramifications for how personal healthcare and beauty brands are discovered and purchased from.

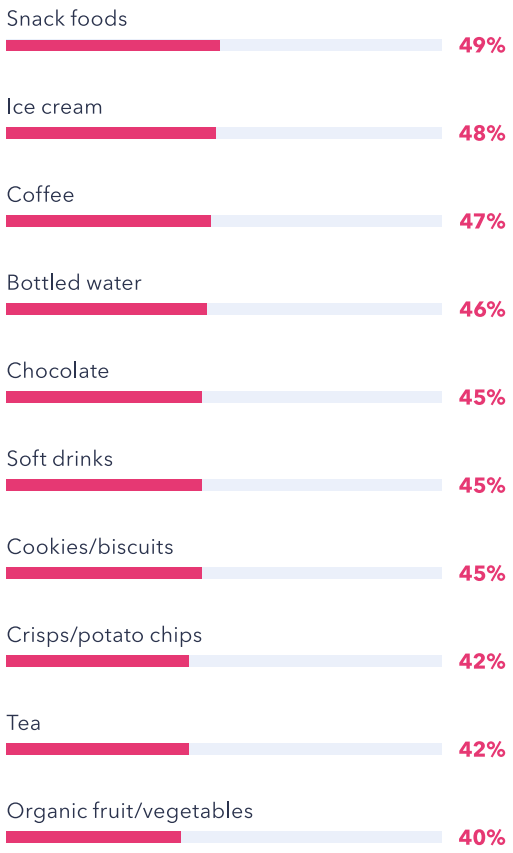
Question: Which of these haircare/skincare/cosmetics brands do you use at least once a week?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Question: When choosing medicines / drugs for everyday ailments (e.g. a cold, sore throat, headache, etc), how important are the following things for you when deciding which brand to buy?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

"Treat Yourself"

Indulgent Shopping | Grocery Purchases

% who say they have purchased the following products in the last month

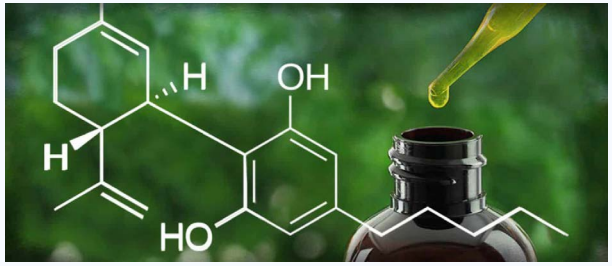


While the appetite for healthy products – fruit and vegetables, free-from and sports nutrition – is at an all-time high, snacking and unhealthy food purchases dominate recent grocery purchases. Of the 17 grocery products that GlobalWebIndex tracks, snack foods, ice cream, chocolate and soft drinks all feature towards the top of items purchased within the past month.

This shows that despite the global health and wellbeing movement, consumers are not, or cannot, commit to a full-time wellbeing regime. But more intense exercise regimes could also be connected to the desire to 'undo' the effects of the "treats" consumers opt in for.

This even holds true for consumers with one or more health conditions. While consumers with at least two health conditions we track are more likely to have purchased vitamins and supplements in the past month (Index 1.62), they also over-index for drinking alcohol (Index 1.26) and eating fast food (Index 1.12) on a weekly basis.

CBD Market Will Hit $22 Billion in U.S. by 2022



2018 was the year that CBD-infused products hit the mainstream, with 'CBD gummies' reaching No. 3 on Google's most popular search terms. Cannabidiol (CBD), a non-intoxicating compound found in cannabis, is being touted as a natural remedy for chronic pain, insomnia, depression and anxiety, among other conditions.

In 2017 and 2018, products have spread to natural food stores, beauty aisles, cafes and doctors offices. This trend is expected to continue, with CBD sales in the U.S. alone predicted to reach $22 billion by 2022, as projected by the cannabis market research company the Brightfield Group. As consumers shift away from pharmaceutical companies and look for natural remedies, CBD seems to be a drug of the future.

Question: Which of these products have you or your household purchased in the last month? Which of these items did you purchase online? Which of these items did you research online before purchasing? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

"Treat Yourself"

Indulgent Shopping | Alcohol Preferences

% who say they have drunk these alcohol brands in the last month

12% Budweiser

9% Heineken

9% Smirnoff

9% Bailey's

8% Bacardi

> **28%** of online consumers say they drink alcohol at least once a week

Indulgent Shopping | Fast Food Preferences

% who say they have eaten weekly from the following convenience brands

16% McDonald's

14% KFC

12% Starbucks

10% Pizza Hut

9% Burger King

> **Three quarters** of all online consumers say that they eat fast food at least once a month

Question: When did you last drink these alcohol brands? / How frequently do you eat or drink products from these convenience brands? Please include all the times you eat-in at their restaurants / cafes, have a take-away or have items delivered to you.
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users 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 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 Q3 2018 wave of research across 44 countries, which had a global sample size of 113,932 respondents. The sample by market breaks down as follows:

Argentina	1,573
Australia	2,346
Austria	1,303
Belgium	1,276
Brazil	2,381
Canada	2,321
China	15,921
Colombia	1,323
Demark	1,293
Egypt	1,754
France	3,292
Germany	2,889
Ghana	1,000
Hong Kong	1,889
India	4,157
Indonesia	1,773
Ireland	1,264
Italy	2,870
Japan	1,731
Kenya	1,000
Malaysia	1,575
Mexico	2,667

Morocco	1,000
Netherlands	1,276
New Zealand	1,287
Nigeria	1,000
Philippines	1,508
Poland	1,856
Portugal	1,297
Russia	2,287
Saudi Arabia	1,505
Singapore	2,563
South Africa	1,547
South Korea	1,289
Spain	2,881
Sweden	1,287
Switzerland	1,286
Taiwan	1,830
Thailand	1,562
Turkey	1,610
UAE	1,784
UK	7,869
USA	16,125
Vietnam	1,612

Notes on Methodology: Internet Penetration Rates

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 2018. 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

ITU Internet Penetration Metric 2018

Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.3%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Colombia	62.3%	Netherlands	90.4%	Taiwan	81.1%
Denmark	98.3%	New Zealand	91.6%	Thailand	57.8%
Egypt	45.2%	Nigeria	32.5%	Turkey	64.2%
France	87.5%	Norway	98.1%	UAE	93.4%
Germany	91.9%	Philippines	60.8%	UK	96.1%
Ghana	45.6%	Poland	76.6%	USA	79.0%
Hong Kong	91.8%	Portugal	75.1%	Vietnam	51.2%
India	40.1%	Romania	65.9%		
Indonesia	32.7%	Russia	81.3%		

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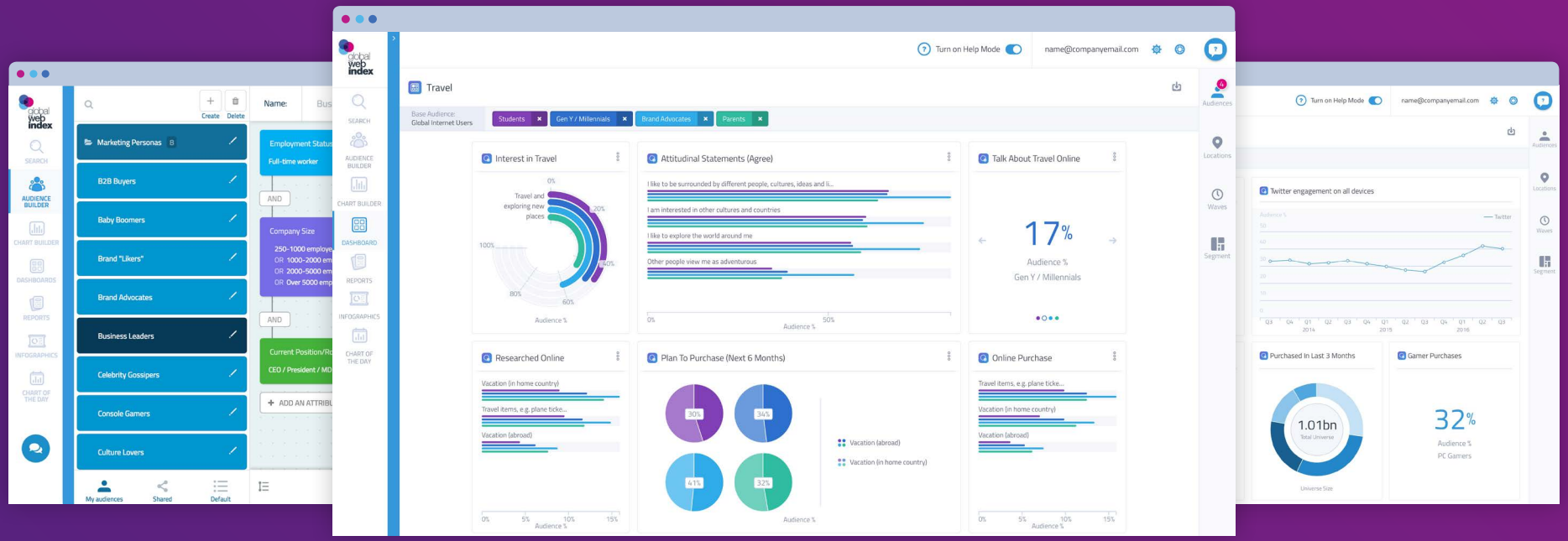

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