The Smartphone Marketplace

GlobalWebIndex's Insight report on the smartphone marketplace

INSIGHT REPORT 2019

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Contents

Introduction

GlobalWebIndex Insight reports take a deep-dive into the crucial topics of the industry. In this report, we focus on the smartphone buying perceptions and behaviors.

Among others, this report covers the following topics in detail:

01 The rate of smartphone ownership around the world

02 The lifecycle of the smartphone

03 Brand ownership vs consideration of different mobile brands

04 The phone features most important to UK and U.S. consumers

05 The purchase drivers and frustrations for consumers' next upgrade

METHODOLOGY

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

Each year, GlobalWebIndex interviews over 575,000 internet users aged 16-64 via an **online questionnaire**. A proportion of respondents complete a shorter version of this survey via mobile, hence the **sample sizes presented in the charts throughout this report may differ** as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

Where clearly stated, this report also draws on data from a bespoke survey from August 2019 among 2,545 (U.S.A.) and 2,738 (UK) internet users aged 16-64.

For more detailed information on GlobalWebIndex and the data used in this report, please consult our **Notes on Methodology** at the end of this report.

Key Insights

Today, **96% of internet users have a smartphone**, up by 15 percentage points since 2015. Predictably, **the likelihood of not owning a smartphone increases with age** – 3% of Gen Zs don't own one compared to 10% of boomers.

The smartphone's lead is particularly pronounced in the Middle East and Africa where virtually everyone has a smartphone and just over half have a computer, mainly down to the important role the smartphone has played in the development of the internet landscape. Meanwhile, **PC ownership is more ingrained in regions characterized by developed markets like Europe and North America**, where internet users likely first came online via PCs and where online populations tend to skew older.

Smartphones are integral to the lives of internet users in the APAC region, who are the most likely to say having the latest technological products is very important to them, and to say they feel more insecure without their mobile compared to their wallet. **This is also reflected in their purchase intentions, as they tend to have the shortest purchase timeframe.** Globally, though, phone life cycles may start to get even longer as phone prices soar year-on-year.

A huge trend that is symbolic of the future of the smartphone market, and the ubiquity of smartphones generally, is the development of mobile payment systems. **Device manufacturers are doubling down on tying other services in their ecosystem to their devices, giving people more reasons to buy their device beyond just the qualities of the handset.** Given that today more people have access to mobile devices than bank accounts, established financial institutions are increasingly forming partnerships with mobile payment providers or developing their own services.

Since H1 2017, Huawei is virtually the only brand to show any meaningful growth in current ownership globally, and this is despite the strenuous year they've had. Huawei was blacklisted by the Trump administration in May over claims it posed a threat to U.S. security, preventing American companies from providing it with their latest tech. The current technology rivalry between the U.S. and China threatens to damage the reputation of Chinese brands among Western consumers.

Reflecting consumer's biggest frustrations about their current phone, **core features such as battery life, storage, and camera picture quality all top the list of smartphone functionalities that are most important to them**. Towards the bottom of the list comes the fancier, more future-forward features such as AR/VR, biometric security features, and 5G compatibility.

For the consumers who purchased their phone via a contract, budget is the key motivator behind this decision. However, **a third of UK and U.S. consumers believe a contract gives them the chance to upgrade their phone regularly as new technology comes out**. The greater flexibility offered by upgrades clearly resonates with a large percentage of contract owners.

01

The Smartphone Marketplace

The Device Breakdown

The Device Landscape

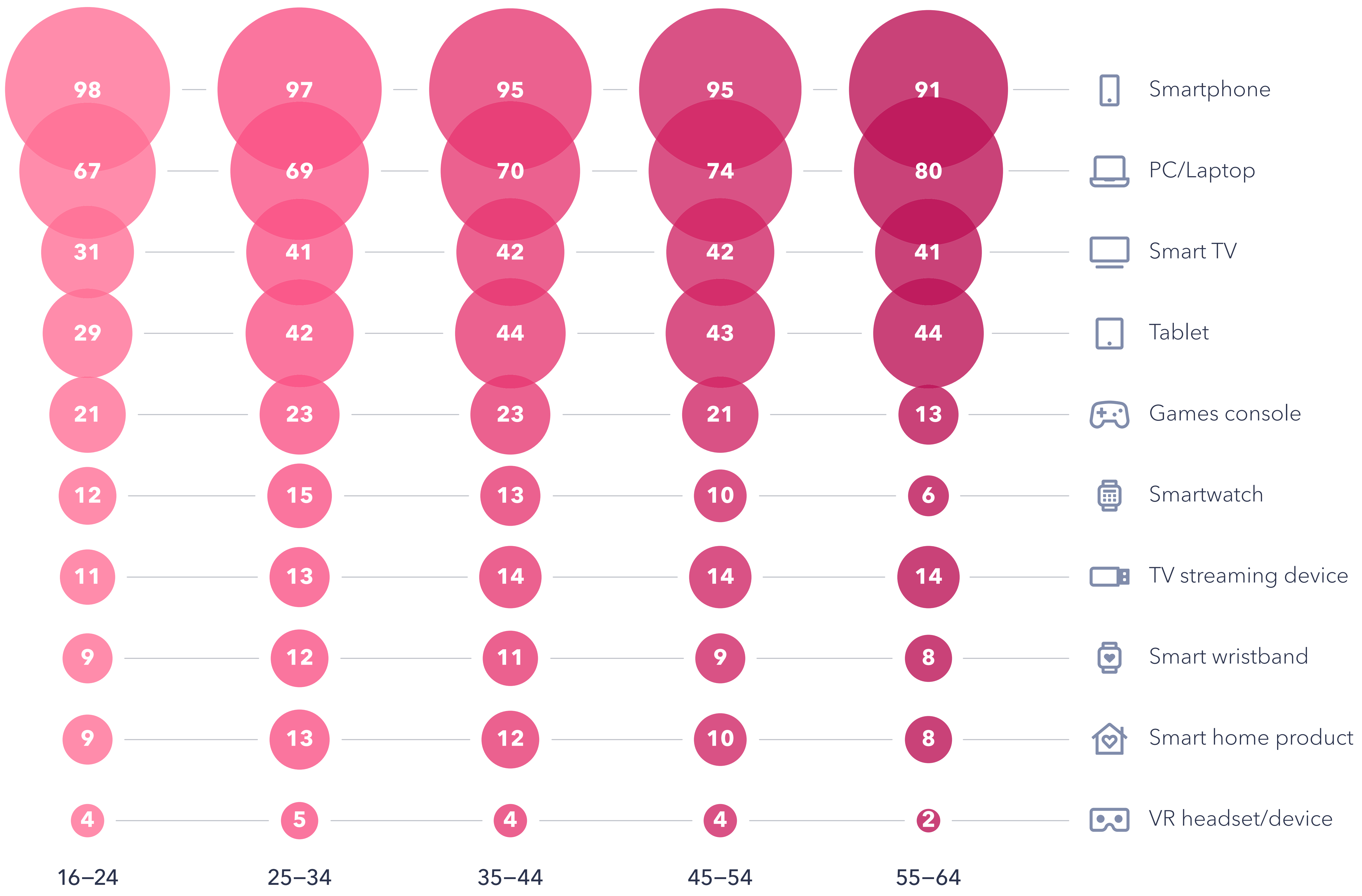
Being virtually universally owned on a global scale, it's well known that smartphones have transformed online behaviors. **Today, 96% of internet users have a smartphone, up by 15 percentage points since 2015.** Predictably, the likelihood of not owning a smartphone increases with age – 3% of Gen Zs don't own one compared to 10% of boomers.

Over the same time period, PC/laptop ownership has declined by 18 percentage points. However, we're not in a post-PC era yet – **7 in 10 global internet users own one in Q2 2019, ranging from 91% in Austria to 32% in Morocco**.

Tablets have lost the momentum they'd enjoyed in the years after their launch. **Adoption peaked in 2015 and has since inched lower year on year, although has stabilized at 39% in Q2.** Games consoles have also been showing a downward trend between 2015 and 2017, but they have remained steady at 22% in the past three years. The rising popularity of mobile gaming, the increasing cost of consoles and a longer upgrade cycle are all having an impact here. However, consoles remain popular in North America and in some parts of Europe, where nearly 4 in 10 respondents report owning one.

DEVICE OWNERSHIP

% who say they own the following devices

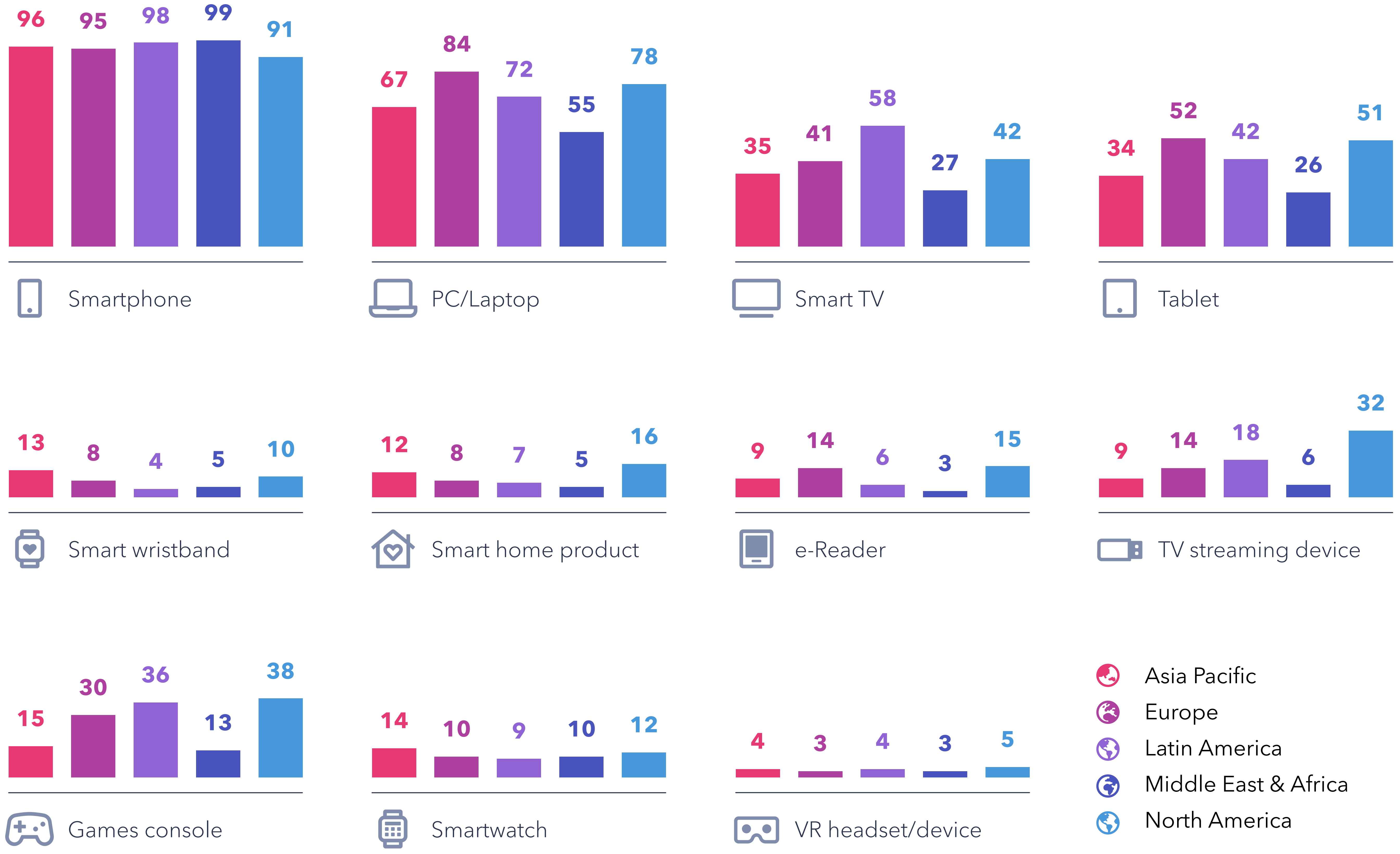


Question: Which of the following devices do you own? **Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 Internet Users aged 16-64

The Centrality of the Smartphone

OWNERSHIP ACROSS REGIONS

% who say they own the following devices



Smartphones have reached a 26-point lead over the bigger screens globally, but it's essential to take a regional perspective here. **The smartphone's lead is particularly pronounced in the Middle East and Africa where virtually everyone has a smartphone and just over half have a computer.** The centrality of the mobile here is mainly down to the important role the smartphone has played in the development of the internet landscape.

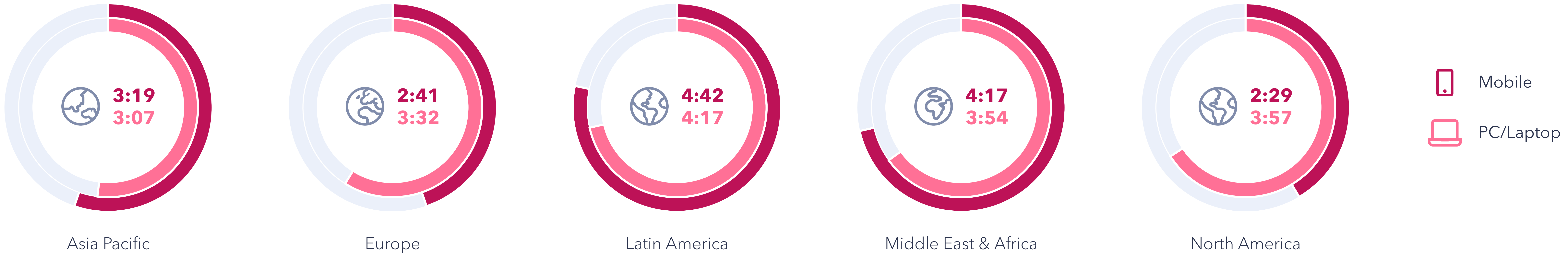
Meanwhile, **PC ownership is more ingrained in regions characterized by developed markets like Europe and North America, where internet users likely first came online via PCs and where online populations tend to skew older**. Nevertheless, smartphones are leading over PCs and laptops in all 45 markets we track today.

Question: Which of the following devices do you own? **Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 Internet Users aged 16-64

Media Consumption by Device

DEVICE CONSUMPTION

Average time spent per day (h:mm) on the following devices



It's important to take a regional perspective here as well. Although the smartphone (unlike the PC) is universally owned across all regions we track, **internet users in North America and Europe still spend longer on their computers**. This is mostly pronounced in the former, where online adults spend 61% of their online time on PCs every day.

All this being said, speaking of a shift to mobile or mobile transition can be misleading. Rather, people are spending more and more time online as mobiles have become a core aspect of their lifestyle. Mobiles, tablets and e-readers have come in as second screens, much as TV supplemented cinemas, and cinemas supplemented radio and theater. **Relative importance shifts, but all in all media consumption continues to rise – especially among higher-income groups.**

This means that while mobile usage may be cannibalizing time spent on computers to some extent, they should be seen more as a complementary screen serving a different purpose, and one which can be used on the go. But as smartphones have risen in importance, and they have become present in a wider range of contexts compared to stationary and big-screen units, more behaviors have become mobile-first.

Question: On an average day, how long do you spend online on a mobile? On an average day, how long do you spend online on a PC/laptop/tablet? **Source:** GlobalWebIndex Q2 2019 **Base:** 115,963 Internet Users aged 16-64

02

The Smartphone Marketplace

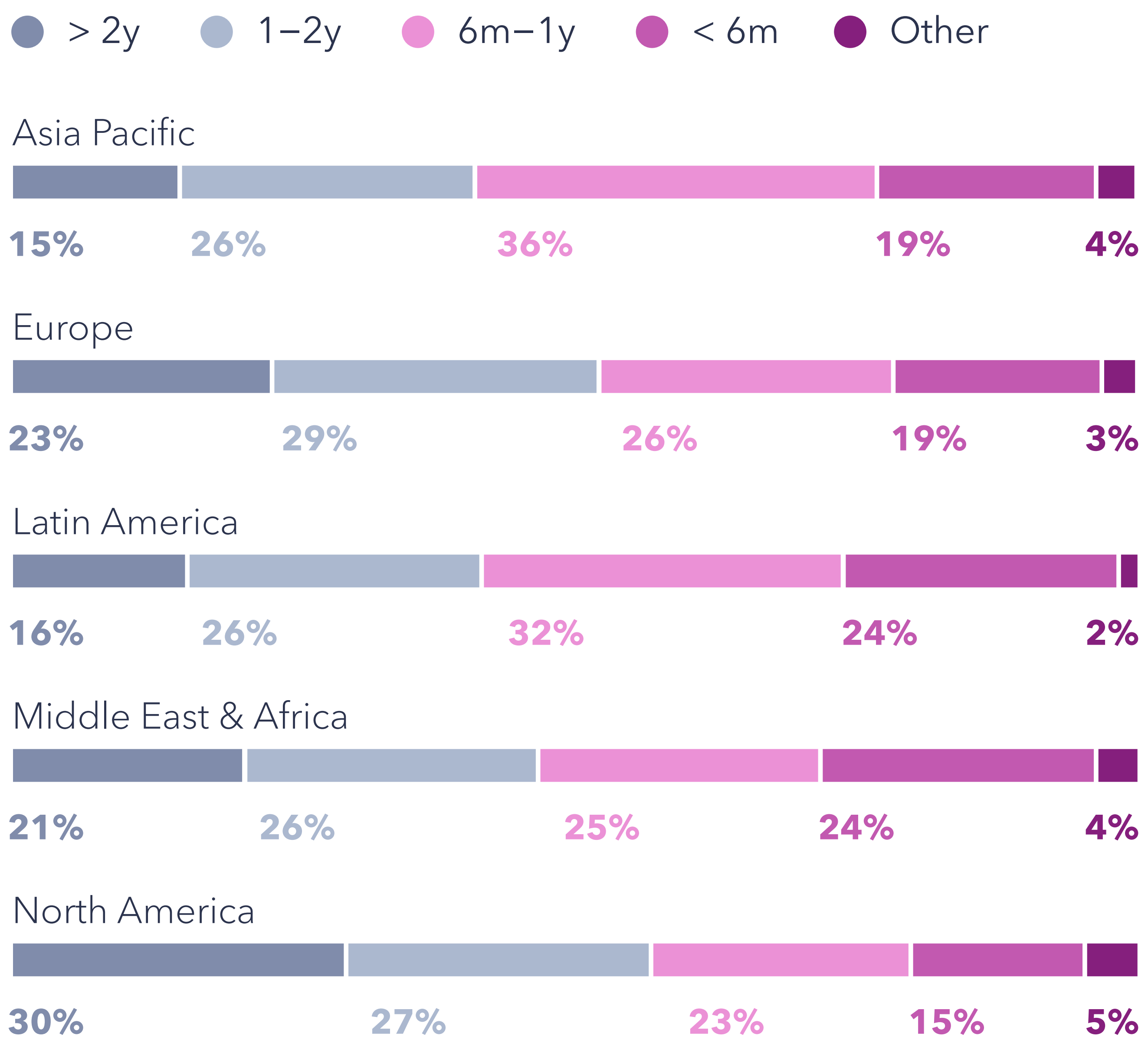
Smartphone Ownership

Mobile Purchase Timeframe

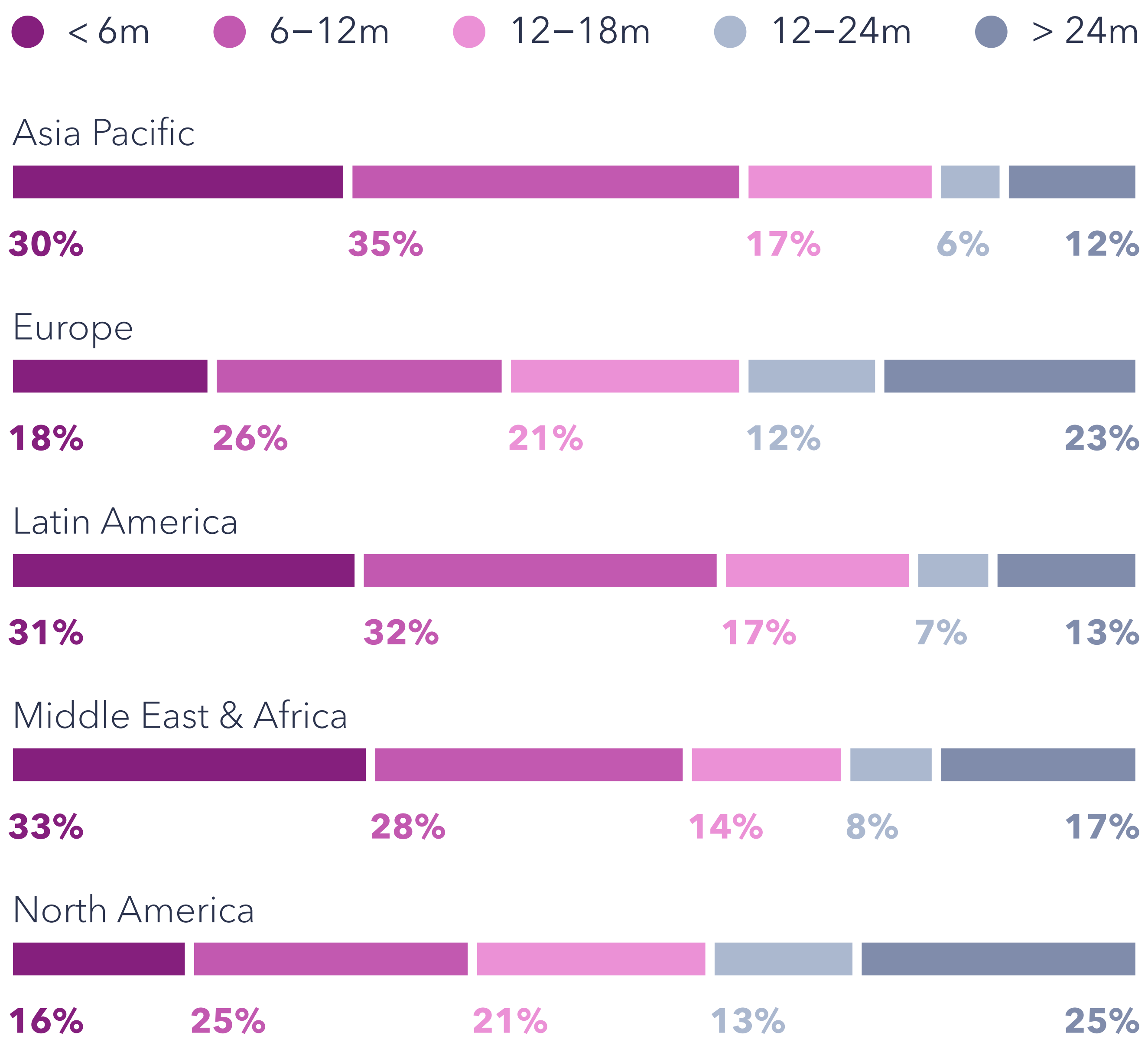
THE SMARTPHONE LIFE CYCLE

% who cite the following timeframes in relation to length of mobile ownership/intention of purchasing a new handset

LENGTH OF MOBILE OWNERSHIP



MOBILE PURCHASE TIMEFRAME



6 in 10 in the APAC region agree that having the latest technological products is very important to them, compared to 56% in MEA, 45% in LatAm and 32% in Europe and North America. A similar number in this region say they feel more insecure without their mobile than their wallet, the highest percentage across all five regions. **This demonstrates how central the smartphone is for consumers in APAC.**

This is reflected in their mobile life cycle. **Mobile owners in APAC are the least likely to say they have owned their mobile for more than 2 years, and are among the most likely to say they plan to buy a new mobile phone or upgrade their existing phone in the next 6-12 months.** Compare this to North America – mobile owners here are 1.8x more likely than average to have owned their current phone for more than 2 years, and are 1.7x more likely to say they plan to upgrade after 24 months.

Phone life cycles may start to get even longer around the world, as phone prices soar year on year. For example, the OnePlus increased the price of its new "Pro" model by 22% over the OnePlus 6T, and it still costs less than its closest Galaxy S10E and iPhone XR rivals. 5G networks play a large part in increasing price points past the $1000 mark, but foldable phones are completely obliterating this barrier. Samsung's foldable Galaxy Fold starts at $1,980 for the 4G version, a price that Samsung justifies by calling it a luxury device that's also a true phone-tablet hybrid. Meanwhile, Huawei's foldable phone, the Mate X, will cost buyers roughly $2,600.

The fact that people buy increasingly costly handsets in the top tier underscores the importance of mobile as an everything-device for communication, work, photography, and entertainment. As processing power, camera technology, battery life and internet speeds keep improving, the value people attach to a phone will swell in parallel.

Questions: How long have you had your current mobile phone for? // When do you plan to buy a new mobile phone or upgrade your existing phone? **Source:** GlobalWebIndex Q2 2019 **Base:** 109,378 Smartphone Owners aged 16-64

• TREND IN ACTION •

Apple Surges Ahead of Samsung in India for First Time Ever

62% of 16-64 internet users in India say when buying a product, the price is more important than the brand name (IDX 1.16)

Samsung has traditionally held dominance in the Indian "premium smartphone" segment, which refers to mobiles that cost 40,000 rupees ($558) or more. But this year, for the first time ever, Apple surged ahead of the Korean electronics giant in India. It dominated 41.2% of the premium market in the second quarter of 2019, according to research firm International Data. In recent months, Apple dropped its price for the iPhone 11's predecessor, the iPhone XR, from 73,900 rupees to 53,900 rupees.

> **The Indian smartphone market is a game of changing fortunes. There isn't a company, no matter how dominant a position it commands, that can afford to sit idle... Consumers in India are known to be discount and deal-oriented. Seeing the iPhone as an aspirational product, many snapped up the mobile once prices were slashed.**

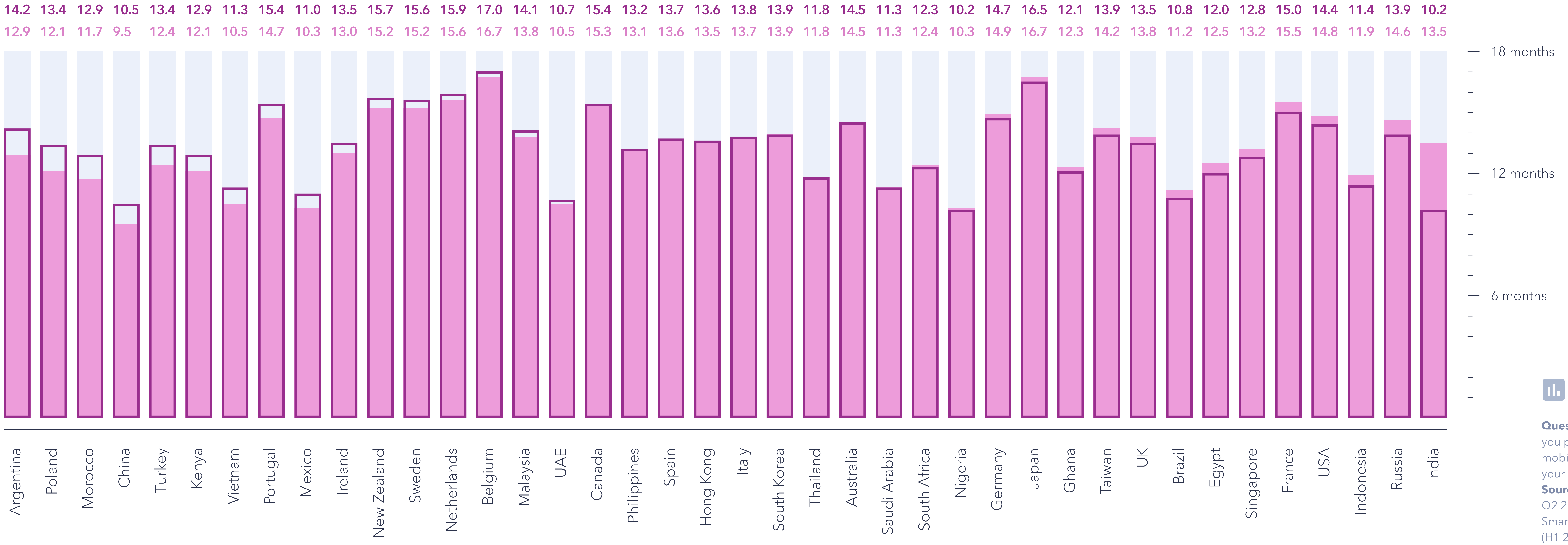
– Technology journalist Mala Bhargava

Market Differences in Purchase Intention

CHANGES IN PURCHASE INTENTION

Average number of months before buying a new phone or upgrading an existing one

H1 2017 H1 2019



Question: When do you plan to buy a new mobile phone or upgrade your existing phone? **Source:** GlobalWebIndex Q2 2019 **Base:** 164,228 Smartphone Owners (H1 2017) and 264,961 Smartphone Owners (H1 2019) aged 16-64

Mobile Payments

A huge trend that is symbolic of the future of the smartphone market, and the ubiquity of smartphones generally, is the development of mobile payment systems. Given that today **more people have access to mobile devices (96%) than bank accounts (89%)**, it's no surprise that established financial institutions are increasingly forming partnerships with mobile payment providers or developing their own services.

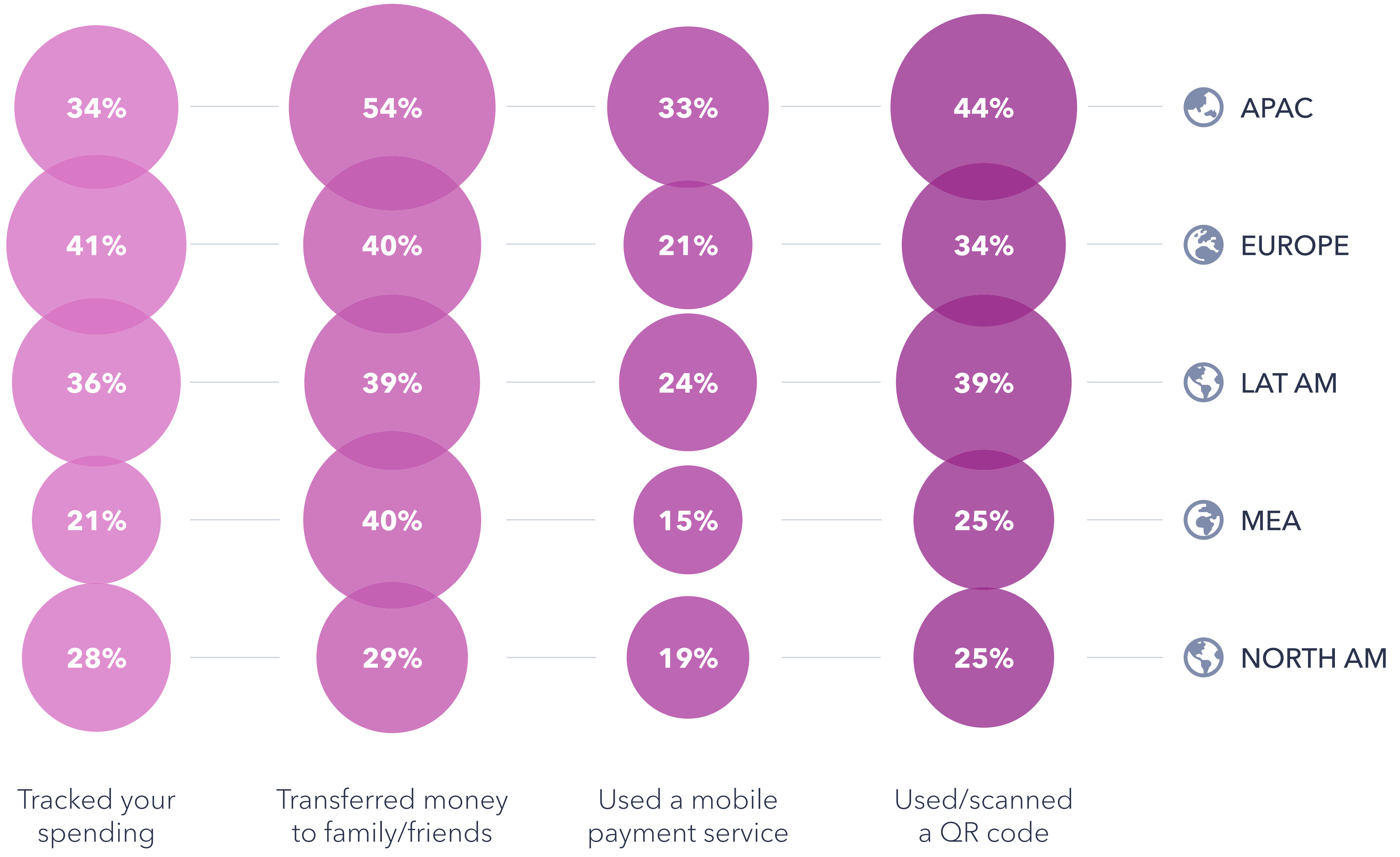
Markets in APAC, such as Hong Kong (41%), Thailand (38%), China (37%), Taiwan (36%) and India (35%), are at the forefront of the mobile payment trend. Within these fast-growth countries, what are now commonly considered traditional payment methods, such as credit or debit cards, never reached the same penetration rates as they did in the likes of North America or Europe. Their 'late mover advantage' in the financial ecosystem has allowed them to transition from primarily cash-driven economies into digital payments hubs, and mobile is at the center of this.

Social networks are another part of the explanation as to why Asia Pacific outscores other regions by such a considerable distance, and it's rooted in the way mobile payment providers in this region have chosen to approach the consumer. Services targeting Western markets like Google Pay, Samsung Pay or Apple Pay are native to mobile handsets or operating systems (although Huawei and Xiaomi have introduced their own native services too). This tactic may boost sales to some extent, but this inevitably limits their addressable market, especially in fast-growth economies in which cheaper handsets prevail.

In contrast, in a handful of Asian markets, **major social media services have sought to offer their own mobile payment services which are indiscriminate of which mobile brand or operating system a consumer uses**, and have been met with considerable success. 3 in 10 digital consumers in China use WeChat Pay and 14% of those in South Korea use Kakao Pay – both services provided by the countries' most popular messaging platforms.

MOBILE ACTIONS

% who have done the following mobile actions in the last month



Just under half of all internet users aged 16-64 have transferred money to family or friends on their mobile in the last month

Question: Which of these have you done on your mobile in the last month? **Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 Internet Users aged 16-64

• TREND IN ACTION •

Will the Apple Card Transform Payments?

1 in 4 iPhone owners have used Apple Pay in the past month

Device manufacturers are doubling down on tying other services in their ecosystem to their devices, giving people more reasons to buy their device beyond just the qualities of the handset. Mobile payments and m-commerce are a huge part of this and, if **trust is the currency of the payments industry**, Apple may well top the list as the most competitive entrant in this space. Alongside a trusting audience, Apple has also created a hardware ecosystem. But this doesn't mean Apple will put banks out of business – PayPal, a relative veteran in the world of digital wallets, actually helps businesses accept Apple Pay in-store, despite having a credit offering and physical card of their own. In the payments industry, collaboration is often more useful than competition.

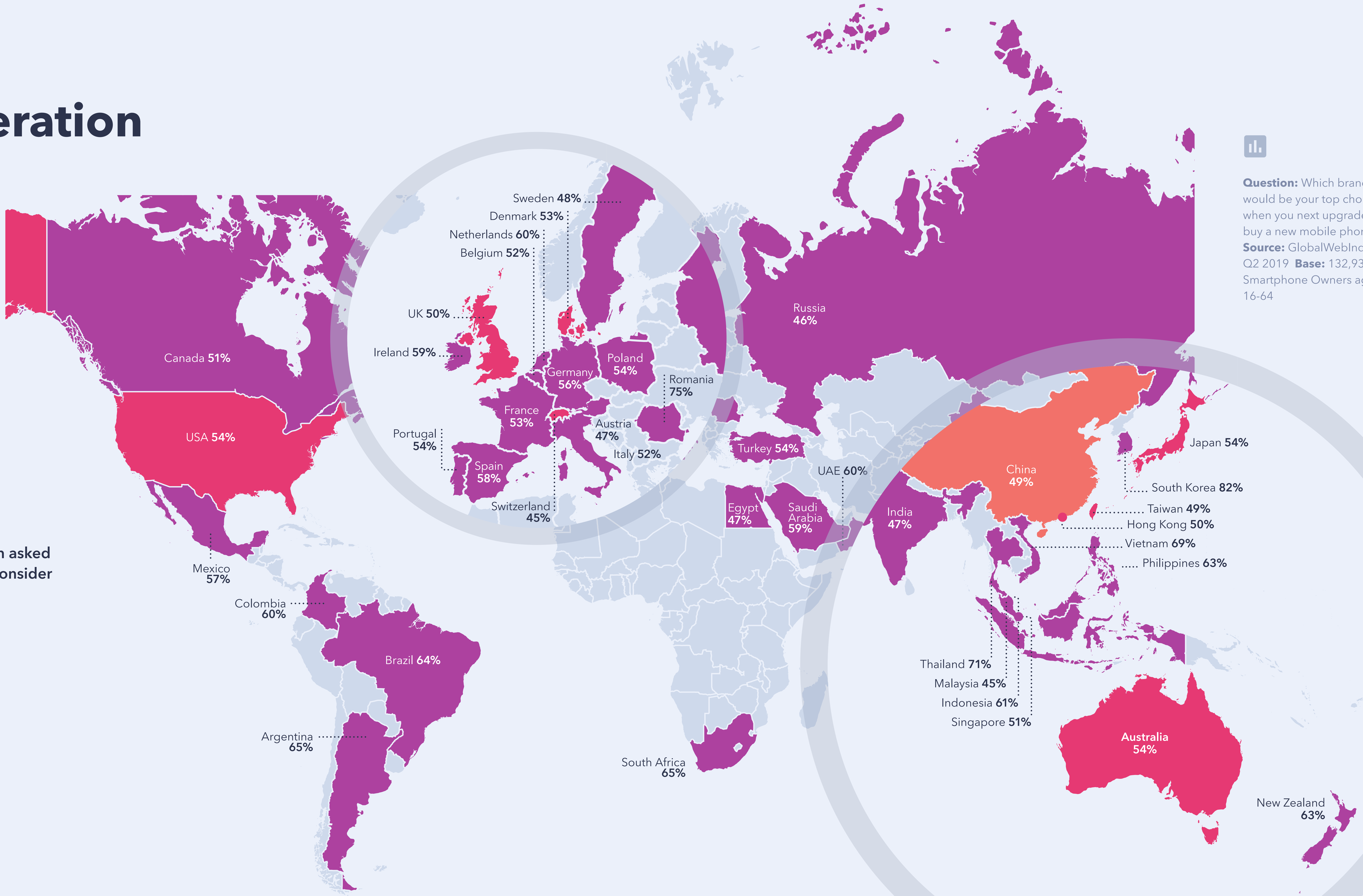
> **We believe that tech companies are best positioned to help people lead a more healthy financial life, so we welcome the news that Apple are looking to break into the finance space. At the end of the day, more choice can only be a good thing for consumers.**
>
> – Chad West, director of marketing and communications at Revolut

Brand Consideration

BRAND CONSIDERATION: MARKET BREAKDOWN

% who say the following brands would be their top choice when they next upgrade or buy a new phone

SAMSUNG | Apple | HUAWEI



Question: Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone? **Source:** GlobalWebIndex Q2 2019 **Base:** 132,936 Smartphone Owners aged 16-64

Only four markets would switch brands when asked which they currently own and which they'd consider for future purchase:

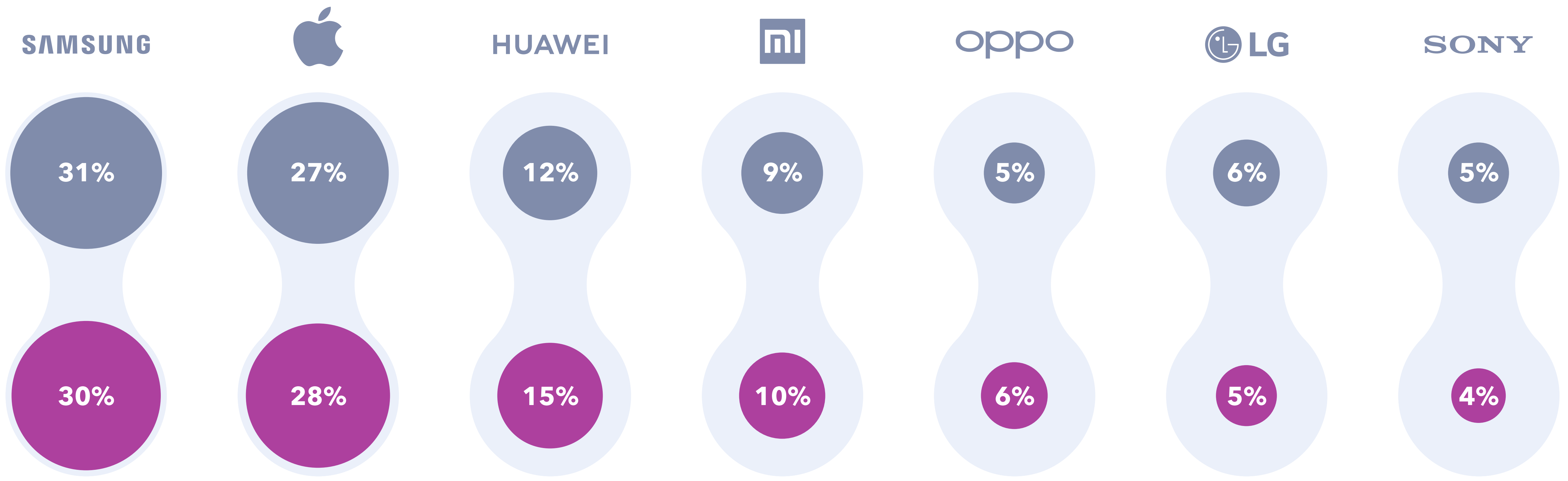
- **Canada** (iPhone to Samsung)
- **China** (iPhone to Huawei)
- **Singapore** (iPhone to Samsung)
- **Sweden** (iPhone to Samsung)

Brand Ownership Over Time

BRAND OWNERSHIP OVER TIME

% who say they own the following mobile brands

H1 2017 H1 2019



> **The challenge we have in the development of the 5G network, at least in the early stage, is the dominance of the Huawei firm. To embed that technology into a critical piece of infrastructure which is telecom is a huge national security risk.**
>
> – Tom Ridge, former U.S. secretary of Homeland Security

> **It's not good for U.S. companies, it's not good [for us].**
>
> – Huawei CEO Richard Yu

Since H1 2017, Huawei is virtually the only brand to show any meaningful growth in current ownership globally, and this is despite the strenuous year they've had. Huawei was blacklisted by the Trump administration in May over claims it posed a threat to U.S. security, preventing American companies from providing it with their latest tech.

Network security concerns are valid given the shift to 5G and the virtualization of networks. With the increasing integration of software in network equipment, backdoors (malware that allows external access to data and/or controls) are increasingly difficult to detect. Europe **loses some $60 billion** annually from cyber espionage, and firms on the receiving end of attacks from China have advocated tougher EU security.

While Australia and Japan have blocked Huawei from involvement in 5G networks, the UK government saw no reason to do the same, and none of these countries have banned Huawei from trading there. Existing Huawei devices will, therefore, be unaffected in their current form – no apps will disappear and they can continue to use Google apps and get security updates. But their next flagship, the Huawei Mate 30 Pro, will have to launch without the full-version of Google Android on board. This will mean no Google Play store, no Gmail, and no Google Maps, unless there's a big change in the political stance of President Trump.

Question: Which of the following mobile brands do you currently own?
Source: GlobalWebIndex H1 2017 & H1 2019
Base: 164,228 (H1 2017) & 264,961 (H1 2019) Smartphone Owners aged 16-64

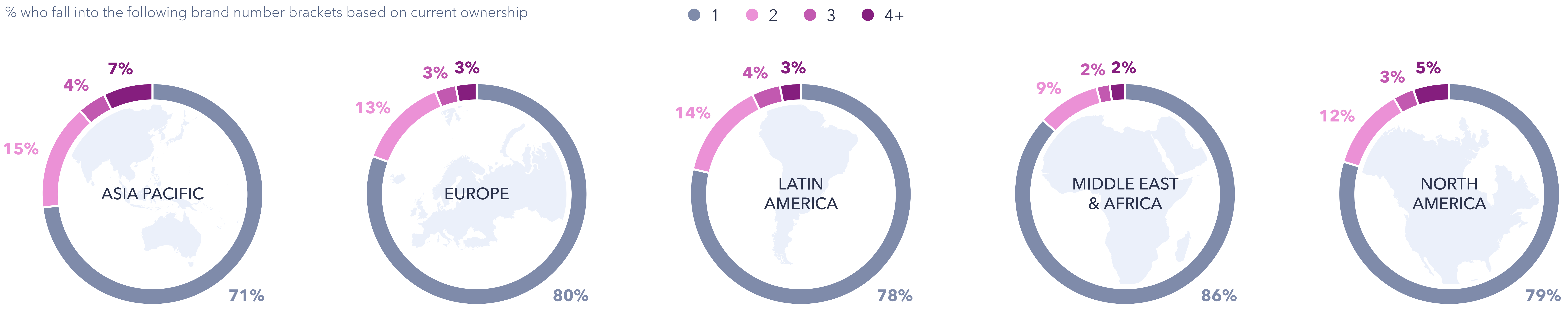
Brand Ownership

The impact on Western consumers' perceptions of Chinese tech brands remains to be seen. These Chinese tech brands are now boasting **valuations** similar to that of Western ones, and like the Chinese government, they're increasingly looking abroad for business. **These Chinese tech brands have an important role to play in the future smartphone marketplace.** This is especially the case in fast growth markets such as in Africa where Chinese brands like Tecno have played such an important part in putting smartphones into the hands of the local populace. But **even in mature markets, consumers have been gravitating to brands like Huawei and Xiaomi which give top handset specifications for affordable prices, compared to Western competitors**.

The current technology rivalry between the U.S. and China threatens to damage the reputation of Chinese brands among Western consumers. In the past, Apple has very **publicly** denied U.S. authorities access to their user data, even in the face of threats to public safety concerns. For Chinese tech brands, their relationship with the Chinese government is very different thanks to China's political system. As such, a similar scenario with a Chinese tech brand may potentially end in a very different result. Such an event may never materialize, but it highlights a danger of distrust among Western consumers in light of President Donald Trump's current rhetoric, and shows how trust will be extremely important in Chinese brands' business abroad.

NUMBER OF BRANDS OWNED

% who fall into the following brand number brackets based on current ownership



Question: This data is auto-generated based on responses to the Mobile Brands: Current Ownership question **Source:** GlobalWebIndex Q2 2019 **Base:** 132,936 Smartphone Owners aged 16-64

03

The Smartphone Marketplace

What’s the Deal?

Phone Features

In our blog released at the beginning of the year, looking at which smartphone features really matter to UK and U.S. consumers, we found that that **while fancy new features may create the most buzz, improvements to the core phone features are actually likely to drive more sales**. The UK and U.S. are among the most challenging markets to incentivize people to upgrade, where smartphone ownership is universal and mid-level phones offer similar functions to top-level ones. These markets are the epitome of smartphone saturation, so understanding their sentiments towards their phones and upgrading is a good indicator of what is happening elsewhere.

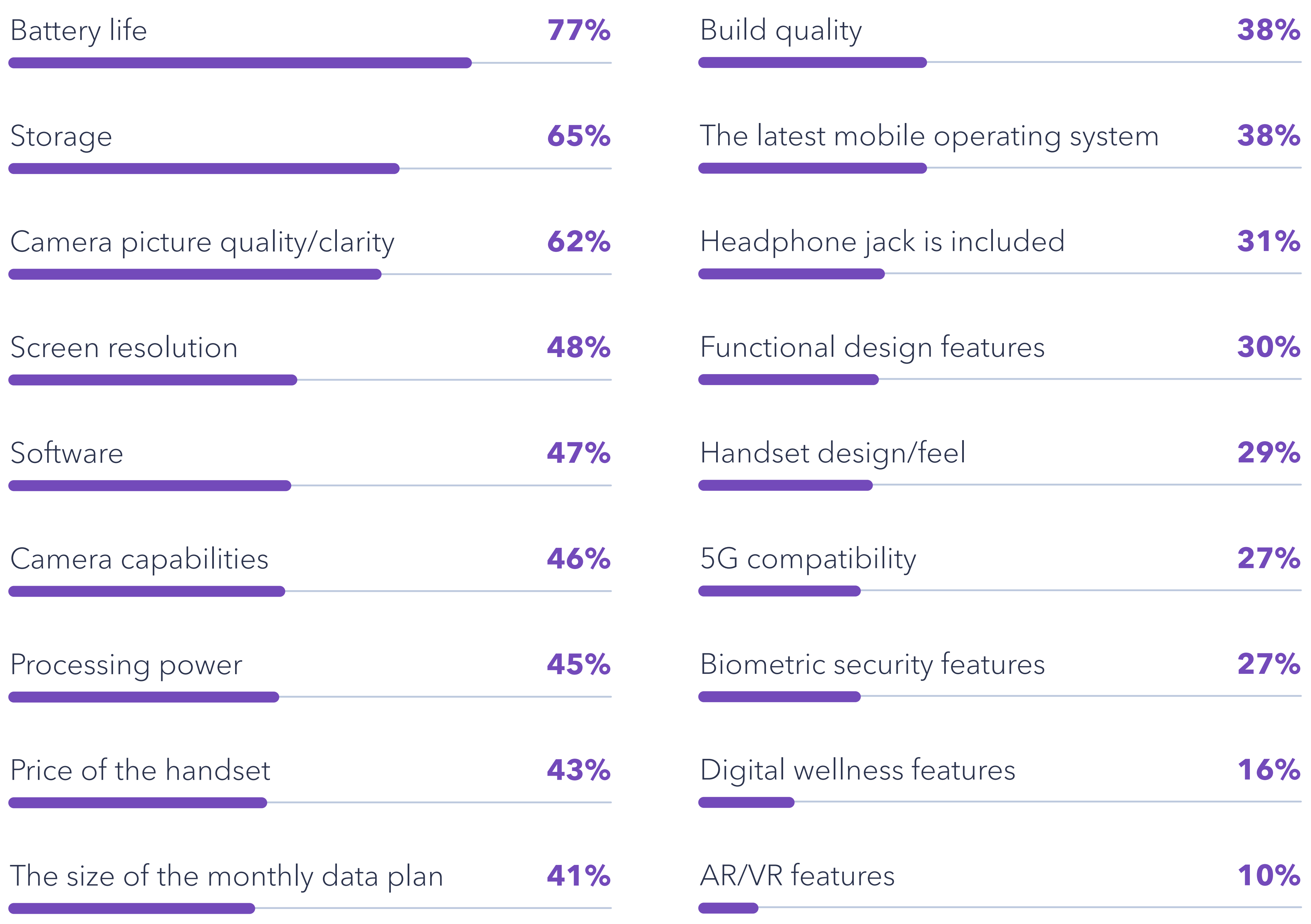
What frustrated UK and U.S. consumers the most about their current handset was poor battery life, which stands significantly above all other frustrations. This grievance was most acute among owners of mid-range smartphones, who make up around three-quarters of those planning to upgrade their handset in the next 12 months. Other factors like storage space, slow performance and poor camera quality also featured prominently.

Nearly a year on, we surveyed another 2,545 U.S. and 2,738 UK consumers to delve deeper into the features most important to them to better understand what would drive them to purchase. **Reflecting consumer's biggest frustrations about their current phone, core features such as battery life, storage, and camera picture quality all top the list of smartphone functionalities that are most important to them.** This holds true across all age groups, but importance does drop slightly for our oldest consumers.

Towards the bottom of the list comes the fancier, more future-forward features such as AR/VR features, biometric security features, and 5G compatibility. Those in the Top 25% are more likely to think of these features as important, although they still come nowhere near core functionalities of smartphones. While we found that 37% of consumers in the UK and U.S. will switch to 5G as soon as it becomes available, the more conspicuous features aren't yet competitive purchase drivers until their value is made clear.

TOP MOST DESIRED FEATURES

% who say the following smartphone features and attributes are important to them



Those in the Top 25% income segment are 1.6x more likely to cite digital wellness features as an important smartphone feature

Question: Which of the smartphone features, functionalities or attributes listed below are most important to you?
Source: GlobalWebIndex August 2019
Base: 2,738 (UK) and 2,545 (U.S.) Internet Users aged 16-64

• **TREND IN ACTION** •

What to Expect From the iPhone 11

An **iFixit teardown** of the new iPhone 11 has found that it might have a more powerful battery than the iPhone XR – while the iPhone 11's battery is smaller than the XR's battery, it has around 7% more capacity. Additionally, the phone has only one connector on the battery, leading iFixit to speculate that the two cables in the 11 Pro may have been for reverse wireless charging. This feature would allow users to charge other devices by setting them on their phone.

What is less certain is the promise of "Apple Tags", the exciting feature that would allow the tracking of physical location of items lost in the real world. This would work as a "Find My Friends" extension from an exciting Apple device towards much smaller standalone tags, presumably through bluetooth. This would be a push from Apple to keep consumers locked into Apple's software and services. The question is now whether Apple will release this feature as a promotional boost during the life of the iPhone, or whether it will remain hidden until the launch of a redesigned iPhone 5G in 2020.

Factors in Purchasing

REASONS FOR PAYING FOR A CONTRACT

% of contract owners who say the following are reasons for choosing to pay for a handset/data using a contract

It allowed me to get a better mobile within my budget	37%
I couldn't afford to pay for the handset outright	35%
It gives me the chance to upgrade my phone regularly as new technology comes out	35%
It was simpler than having to buy a mobile separately	23%
Better customer service/warranty	19%
There was little difference in price between a data-only plan and a plan which covers both the handset and the data	16%

CONTRACT FRUSTRATIONS

% of contract owners who say the following are frustrations of owning a contract

I don't like to be locked into such a long contract	30%
The monthly bill can sometimes increase in cost	27%
I often end up paying too much for the smartphone overall	26%
I don't like having to wait such a long time to upgrade my handset	23%
The cost of exceeding my monthly data plan	21%
I'm worried about the phone breaking during the contract	20%
The phone becomes outdated compared to new models	20%

POST-CONTRACT INTENTIONS

% of contract owners who say they intend to do the following once their contract expires

I plan to trade in the handset and upgrade to a new one	31%
I plan to keep using my existing handset and continue with a data contract	23%
I plan to keep the handset and upgrade to a new one	21%
I plan to keep using my existing handset and switch to a SIM-only deal	12%
I don't plan to do anything	10%
Other	3%

For the consumers who purchased their phone via a contract, **budget is one of the key motivators behind this decision**. 37% say they did so because it allowed them to get a mobile within their budget, and 35% did because they couldn't afford to pay outright for the handset. However, **a similar percentage did so because it gives them the chance to upgrade their phone regularly as new technology comes out**. The greater flexibility offered by upgrades clearly resonates with a large percentage of contract owners, especially given that 31% of contract owners say they plan to trade in the handset and upgrade to a new one once their current handset expires.

However, there are certain frustrations associated with having a contract. Namely, being locked into such a long contract (30%), monthly increases in cost (27%) and ending up paying too much for the smartphone compared to just paying outright (26%) top the list of frustrations with using a contract for both the handset and the data.

35% of consumers in the UK and U.S. purchased their phone with a one or two year contract, 32% paid outright using a pay-as-you-go SIM

Questions: Thinking about your main personal smartphone, what kind of deal do you use to pay for the handset and the data? // Why did you choose to pay for your handset and data using a contract? // What are your main frustrations with using a contract for both the handset and the data? // Which of the below best describes what you intend to do once your current handset contract has expired?
Source: GlobalWebIndex August 2019
Base: 2,161 Smartphone Contract Owners in the UK and U.S. aged 16-64

Purchase Drivers and Discouragers

Among the things that would most increase consumers' likelihood of purchasing a specific handset/deal when the time comes, **a "free" gift alongside the handset (e.g. a TV, games console, tablet or voucher) comes top of the list**, with 35% saying this. Gift-giving isn't as rare as one might think; for example, Samsung offer a free pair of AKG headphones whenever you buy a new Samsung Galaxy device online.

Contract bundles which include TV/film streaming services are the most popular bundle you can offer (28%) to increase the likelihood of consumers purchasing a specific handset or deal, followed by music streaming bundles (24%) and sport broadcasting bundles (14%)

The main frustration when it comes to purchasing a new smartphone, and therefore the prime motivation for not buying, is the cost of smartphones now. Almost 60% of smartphone owners cite this as the primary frustration they have, followed much further down by smartphone manufacturers releasing new handsets too quickly (34%) and the cost of data plans which meet their needs (32%).

PURCHASE DRIVERS

% who say the following would increase their likelihood of purchasing a specific handset/deal when the time comes

A "free" gift alongside the handset	41%
Unlimited texts	36%
The ability to roll over any unused data each month	35%
Great customer service	34%
The option to trade in my existing handset	33%
A long warranty cover	33%
Free limited phone insurance	30%
Access to a TV/film streaming service (e.g. Netflix)	28%
Free delivery of the handset	26%

PURCHASE FRUSTRATIONS

% who say the following are main frustrations when it comes to purchasing a new smartphone

Smartphones are too expensive	56%
New handsets are released too quickly	34%
The cost of data plans which meet my needs	32%
Having to spend more money on phone accessories	29%
Poor quality accessories	26%
Too many handsets to choose from	21%
People spend too long looking at screens as it is	16%
Not understanding differences in handset specifications	10%
I don't have any	8%

Question: Which of the below would increase your likelihood of purchasing a specific handset/deal when the time comes to purchase another smartphone? // What are your main frustrations when it comes to purchasing a new smartphone?
Source: GlobalWebIndex August 2019
Base: 2,545 (U.S.) and 2,738 (UK) 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 575,000 internet users aged 16-64 across 45 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a 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 Q2 2019** wave of research across 45 countries, with a global sample of 139,658 respondents.

Argentina	1,565
Australia	4,056
Austria	1,291
Belgium	1,282
Brazil	2,355
Canada	2,301
China	15,215
Colombia	1,330
Denmark	1,257
Egypt	1,788
France	5,152
Germany	5,176
Ghana	847
Hong Kong	1,813
India	7,594
Indonesia	1,855
Ireland	1,269
Italy	5,363
Japan	1,877
Kenya	958
Malaysia	1,533
Mexico	2,619
Morocco	947
Netherlands	1,311
New Zealand	1,298
Nigeria	958
Philippines	1,627
Poland	1,875
Portugal	1,288
Romania	1,309
Russia	2,273
Saudi Arabia	1,537
Singapore	2,714
South Africa	1,548
South Korea	1,278
Spain	5,114
Sweden	1,314
Switzerland	1,291
Taiwan	1,783
Thailand	1,570
Turkey	1,536
UAE	1,804
UK	10,146
USA	25,037
Vietnam	1,604

Notes on Methodology

ACROSS GLOBALWEBINDEX'S MARKETS

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

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

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

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically. Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

MOBILE SURVEY RESPONDENTS

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INTERNET PENETRATION RATES

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

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

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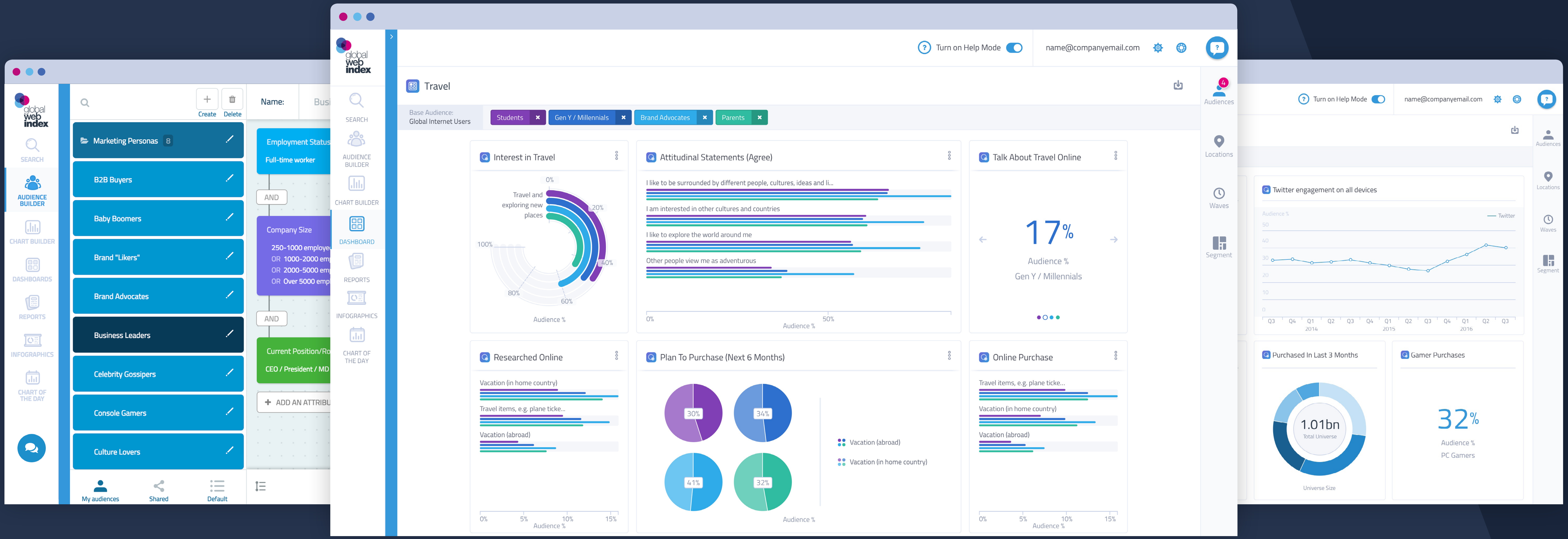

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