Entertainment

GlobalWebIndex's flagship report on the
latest trends in online entertainment

Contents

Introduction

Our Entertainment flagship report provides the most important insights and latest figures for online entertainment behaviors around the world. Among others, this report covers the following topics in detail:

- The numbers engaging with online entertainment, including music, video and games.

- The relationship between linear and online TV.

- The state of online music and video streaming, as well as which platforms are performing best.

- Which devices are most important for gaming, how gaming entertainment is evolving, and the opportunities this presents for brands.

- The impact of entertainment on the consumer-brand relationship.

- The trends in social entertainment.

Key Insights

Linear TV is still going strong

It has the greatest reach, and commands the most eyeball time. Netflix continues to spread globally but online TV isn't cannibalizing broadcast; it's complementing it.

It's a pivotal time for music streaming

Rivalry between Apple, Spotify and Amazon is helping to drive user growth, while local services show the importance of culturally relevant content. Smart speakers may be the key to unlocking an audience of casual listeners.

The console decline is stabilizing

There are fewer Console Gamers than in 2014, but the device's evolution into a multimedia hub means that Console Gamers are spending more time on their devices.

Esports are maturing and becoming more mainstream

Its viewers are a desirable demographic for marketers, and continued investment and organization of competitions is propelling it towards established media channels.

TV is still the most effective advertising medium

It ranks highest for brand discovery among our tracked media, with 37% finding out about brands through TV ads. But internet users are also looking to brands to provide entertainment themselves, consuming branded videos and games.

Social media is an entertainment hub

Bridging commentary around sports with the rights to broadcast them is at the heart of their content strategies. Social media services are also investing in long-form video platforms and looking more at music licensing.
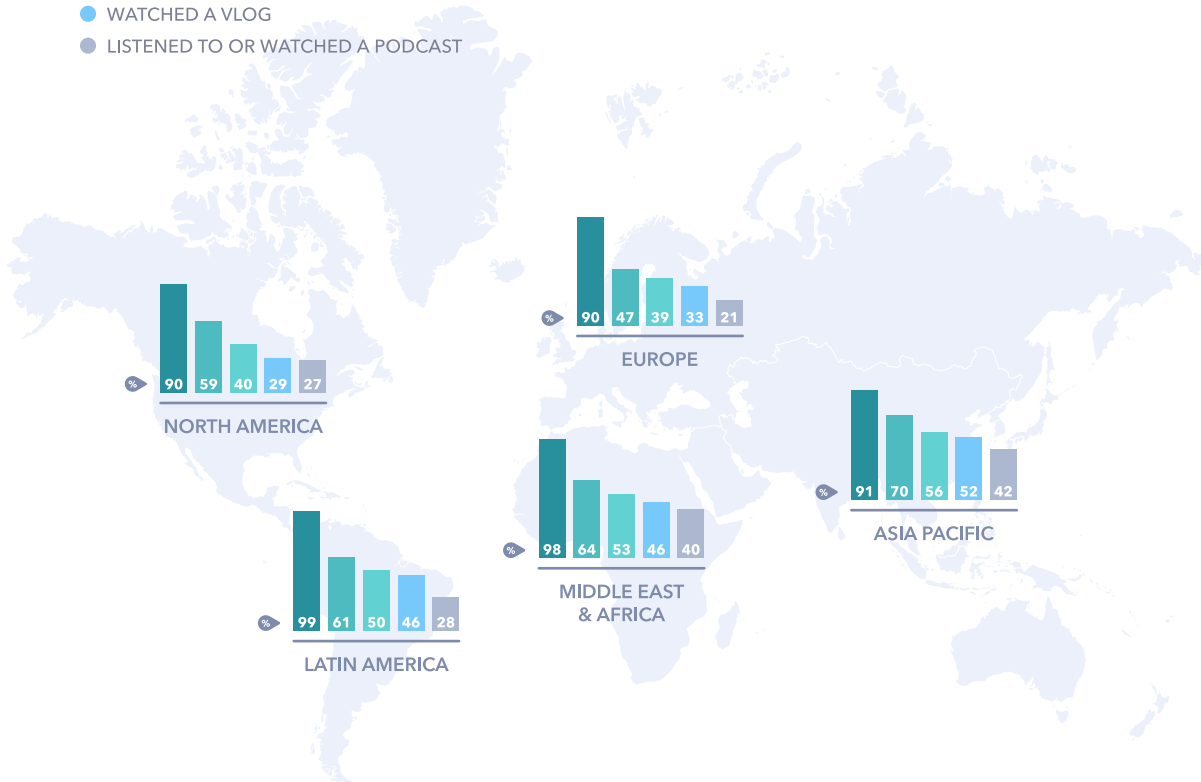
Entertainment

Engagement with Online Entertainment

Engagement with Online Entertainment
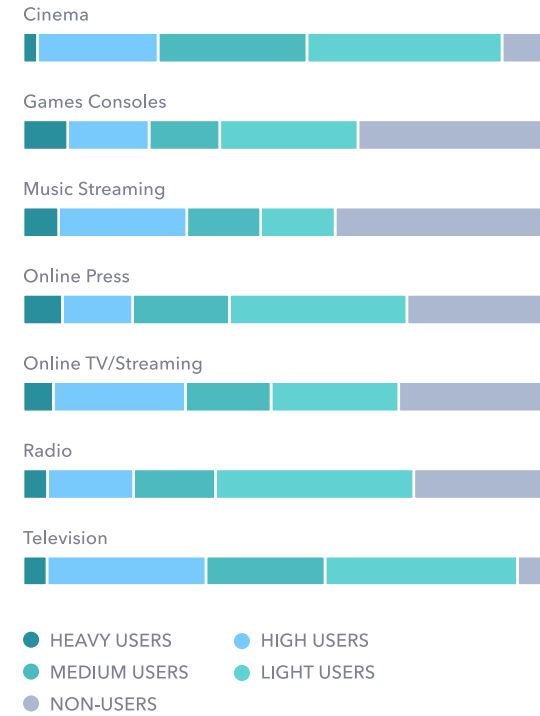
ONLINE ENTERTAINMENT ACTIVITIES
% of internet users who have done the
following in the last month

- ● WATCHED A VIDEO CLIP OR VISITED A VIDEO-SHARING SITE
- ● USED A MUSIC-STREAMING SERVICE
- ● WATCHED SPORTS COVERAGE OR HIGHLIGHTS ONLINE
- ● WATCHED A VLOG
- ● LISTENED TO OR WATCHED A PODCAST

EUROPE
% 90 47 39 33 21

NORTH AMERICA
% 90 59 40 29 27

LATIN AMERICA
% 99 61 50 46 28

MIDDLE EAST & AFRICA
% 98 64 53 46 40

ASIA PACIFIC
% 91 70 56 52 42

MEDIA CONSUMPTION SEGMENTATION
Internet users' engagement with the
following forms of media

Cinema

Games Consoles

Music Streaming

Online Press

Online TV/Streaming

Radio

Television

- ● HEAVY USERS
- ● MEDIUM USERS
- ● NON-USERS
- ● HIGH USERS
- ● LIGHT USERS

Entertainment

TV/Video

TV/Video

● Daily average time spent watching TV (hh:mm)

● Daily average time spent watching online TV (hh:mm)

● % using subscription services such as Netflix

● % using VPNS for entertainment access

00 Top 5 Markets

Daily average time spent watching TV (hh:mm): 2:10, 2:16, 1:53, 2:18, 2:22, **2:25**, 1:20, 1:57, **2:35**, 2:17, 1:40, 1:33, 1:59, 2:02, 2:18, 2:13, 1:43, 1:51, 2:19, 1:49, 2:10, **2:25**, 2:03, 2:12, 1:58, 1:30, 2:01, 2:06, 2:09, 2:01, 2:01, 1:31, 2:08, 2:13, 1:18, **2:37**, **2:57**, 1:21

Daily average time spent watching online TV (hh:mm): 0:51, 0:46, 0:36, 0:27, 1:03, 0:59, **1:23**, **1:11**, 0:26, 0:38, 0:40, 1:10, 0:53, 0:59, 0:39, 0:17, 1:02, 1:00, 0:37, 0:55, 1:11, 0:43, 0:26, 0:46, 1:10, 0:49, 0:53, 0:38, 0:44, 0:48, 0:33, 0:45, **1:39**, 0:54, 1:08, 1:04, **1:13**, **1:14**

% using subscription services: 78%, 74%, 69%, 60%, **87%**, 70%, **83%**, 74%, 66%, 67%, 75%, 79%, 77%, 79%, 70%, 41%, 71%, **89%**, 64%, 80%, **85%**, 77%, 53%, 61%, 73%, 69%, 69%, 65%, 77%, 81%, 56%, 56%, 78%, 72%, 73%, 79%, 80%, **82%**

% using VPNS for entertainment access: 10%, 6%, 5%, 6%, 13%, 6%, 17%, 14%, 4%, 4%, 9%, **21%**, **33%**, 11%, 6%, 3%, **22%**, 12%, 4%, 8%, **20%**, 8%, 10%, 8%, 18%, 12%, 15%, 4%, 6%, 8%, 6%, 12%, **20%**, 17%, 17%, 8%, 6%, 19%

Countries: Argentina, Australia, Austria, Belgium, Brazil, Canada, China, Egypt, France, Germany, Hong Kong, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, UAE, UK, USA, Vietnam
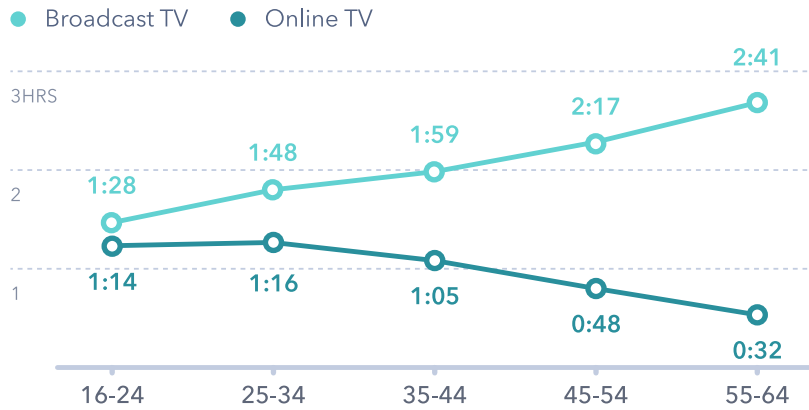
Question: Roughly how many hours do you spend watching television during a typical day? // Roughly how many hours do you spend watching/streaming online forms of television during a typical day? // In the past month, which devices have you used to do the following? This includes any TV you watch in your home, office, while traveling or any other location. Watch subscription services such as Netflix // Can you please tell us why you use VPNs or proxy servers when browsing the internet? **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

TV/Video

Average time per day spent watching the following (hh:mm)

- ● Broadcast TV   ● Online TV

or finding online-exclusive content in association with popular shows, online entertainment is now providing a value of its own which can add to broadcast channels.

The growth of online TV is complementing, not cannibalizing broadcast

We can see the role online TV occupies in our data for TV behaviors. If we combine all our tracked digital sources like computers, mobiles, and games consoles into an aggregate and compare it with linear TV, then linear TV is ahead by 14 percentage-points for watching live TV. But there's a clear preference for digital sources over TV sets for using catch-up services (42% to 30%) and subscription services (44% to 23%).

In every age bracket, internet users watch more broadcast TV than online TV, despite year-on-year drops in broadcast engagement. Lifestyle has an impact in preserving its reach, with consumers in a relationship and those living with their partner engaging more with broadcast TV, but spending less time watching online TV per day.

Online TV is a part of internet users' daily routines too. It's captured more and more daily media time among internet users since 2012, climbing from the 45 minutes per day mark to its current standing of just over an hour. Context is key here. **Rather than cannibalizing broadcast distribution channels, online TV complements them,** moving the experience away from one-time, one-place viewing to a more flexible experience. Whether it's catching up on missed content

From a regional perspective, North America posts the strongest figures for broadcast TV by a considerable margin, and also scores highly for online TV (on over an hour). Internet users in Asia Pacific, on the other hand, are spending the longest amount of time watching online TV and are the least enthusiastic watchers of linear TV.

Despite the smaller screen size, **44% of internet users are watching TV of any form on a mobile.** The portability of smartphones, together with impressive screen resolutions, and generous data packages in certain markets, points to their future role in the online entertainment landscape. Thanks to mobile bringing TV engagement out of the household, marketers can reach consumers throughout the day, whether that's during the morning commute or at the gym.

The Video Streaming Market

% of internet users who watch/download TV shows/films on the following services

Asia Pacific		MEA		Europe		North America		Latin America	
iQiyi [1]	**35%**	Shahid.net [2]	**31%**	Netflix	**31%**	Netflix	**65%**	Netflix	**75%**
YouKu [1]	**31%**	Netflix	**31%**	Amazon Prime Video	**15%**	Amazon Prime Video	**31%**	Claro Video [4]	**16%**
Tencent Hollywood VIP [1]	**22%**	Amazon Prime Video	**16%**	VK [3]	**12%**	Hulu	**25%**	Telecine Play [5]	**11%**

[1] China only

[2] Egypt, KSA, and UAE only

[3] Russia only

[4] Brazil and Mexico only, since Q2 2017; Argentina, since Q4 2017

[5] Brazil only

It's Netflix and Amazon who tend to hog the headlines for TV streaming, but their global expansion puts them into competition with local services in each country they enter. Having taken the lead in North America, Europe, Latin America, and joint-first place in the Middle East and Africa, Netflix has also made headway in APAC, taking 18% of the market. **Now - more than ever - Netflix faces the need to double down on culturally relevant content.** Local services in markets like India, Hong Kong and South Korea have a commanding grip of the media landscape, with strong ties to familiar domestic TV networks, posing significant challenges to any entrants from outside.

Beyond these established local competitors, streaming services also have the challenge of monetizing users. **At present, there's a gap between the number of internet users watching a service and those actually paying for it.** Part of the reason for this is account sharing, with 46% of Amazon Prime Video users and 60% of Netflix users sharing their accounts.

Despite aggressive global expansion, there are still discrepancies between content libraries in different countries. Internet users in fast-growth markets often use a Virtual Private Network (VPN) tool to access broader libraries or more desirable content from other countries. VPNs allow users to bypass traditional connections and tracking methods to use the internet via a remotely located server - with the servers in question often based in nations like the U.S.A., Ireland, Sweden and the Netherlands rather than the user's home country.

Ask VPN users why they use them and close to half say it's to access better entertainment content. This equates to 14% of internet users globally, though figures can peak much higher among certain groups. In Indonesia, it rises to a third of the online population.

1 in 5 16-24 year-old internet users use VPNs to find entertainment content
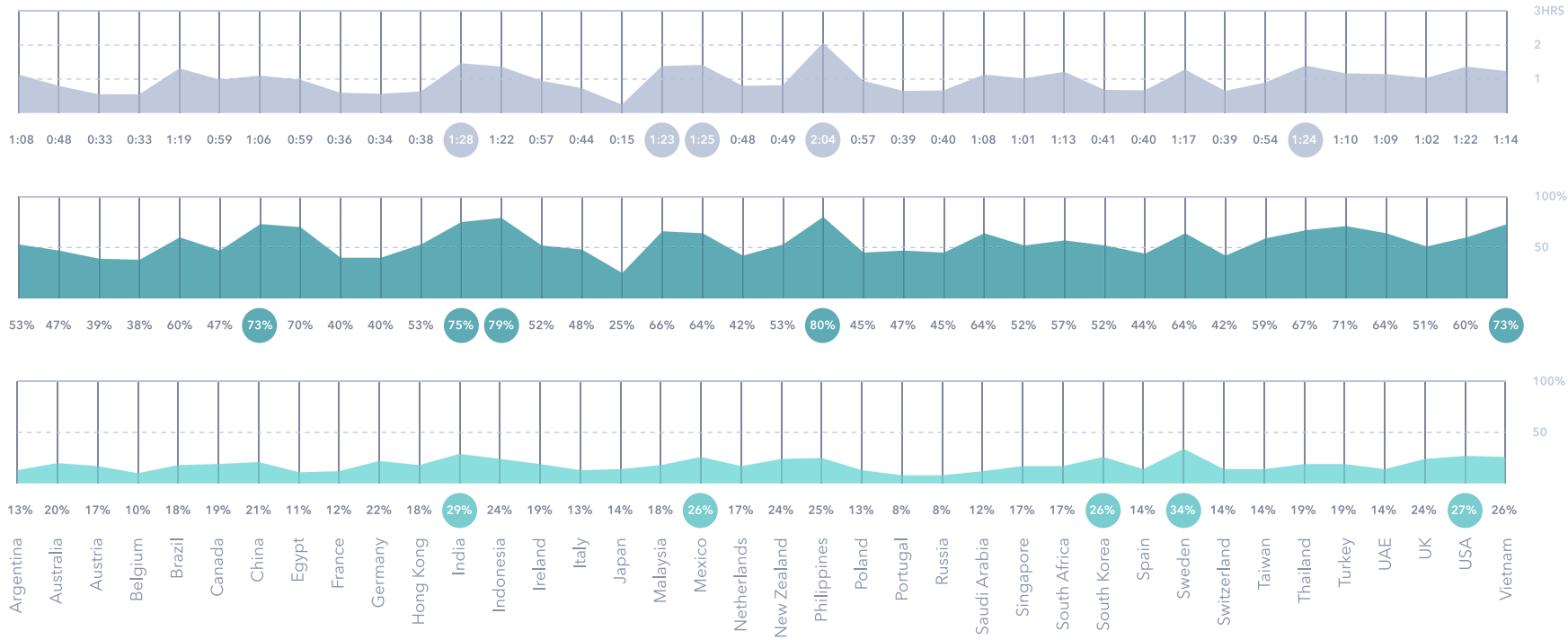
The Music Streaming Market

The Music Streaming Market

● Daily average time spent engaging with music streaming services (hh:mm)

● % who used a music streaming service last month

● % who paid for a music streaming service last month

00 Top 5 Markets

Country	Daily avg time	% used	% paid
Argentina	1:08	53%	13%
Australia	0:48	47%	20%
Austria	0:33	39%	17%
Belgium	0:33	38%	10%
Brazil	1:19	60%	18%
Canada	0:59	47%	19%
China	1:06	73%	21%
Egypt	0:59	70%	11%
France	0:36	40%	12%
Germany	0:34	40%	22%
Hong Kong	0:38	53%	18%
India	1:28	75%	29%
Indonesia	1:22	79%	24%
Ireland	0:57	52%	19%
Italy	0:44	48%	13%
Japan	0:15	25%	14%
Malaysia	1:23	66%	18%
Mexico	1:25	64%	26%
Netherlands	0:48	42%	17%
New Zealand	0:49	53%	24%
Philippines	2:04	80%	25%
Poland	0:57	45%	13%
Portugal	0:39	47%	8%
Russia	0:40	45%	8%
Saudi Arabia	1:08	64%	12%
Singapore	1:01	52%	17%
South Africa	1:13	57%	17%
South Korea	0:41	52%	26%
Spain	0:40	44%	14%
Sweden	1:17	64%	34%
Switzerland	0:39	42%	14%
Taiwan	0:54	59%	14%
Thailand	1:24	67%	19%
Turkey	1:10	71%	19%
UAE	1:09	64%	14%
UK	1:02	51%	24%
USA	1:22	60%	27%
Vietnam	1:14	73%	26%

Of the entertainment media we track, **music streaming has the highest number of non-users (40%).** But there's still a significant number of high/heavy engagers - more than most media we track. So there's still work to do in converting non-users into casual listeners, as is the case for radio, where many internet users listen casually but few do not listen at all. **Markets where music streaming has the most potential to expand are European countries with older populations where radio is still king,** like Belgium, Germany, and Austria.

More time is spent listening to radio than music streaming in 21 of our 42 tracked markets

The Music Streaming Market

Smartphones have been the driver for music streaming's growth so far, with all age groups now streaming music more on mobiles than any other device. But with 4 in 10 internet users yet to turn to streaming, **new hardware could be the next frontier to convert more casual music listeners into streamers.** A quarter of internet users who don't use music streaming services are planning to purchase a smart speaker, which would remove the friction of downloading and installing software. Simply asking a voice-enabled device to "play music" may be the key to generating more casual music streamers in the years to come.

As with TV streaming, in all regions there's a gap between the number of internet users who report using a music streaming service and those who have paid for one, underlining the work needed to create revenues from users. **63% of Spotify users, and the same percentage of Apple Music users, are on free or trial accounts.**

Streaming services are on the verge of overtaking monthly music downloads

Music downloads (22%) are currently bought more than music streaming services (21%), but this is approaching a tipping point where streaming will overtake downloads. This is because **internet users display a much stronger preference for accessing content services rather than owning the content themselves.** Both the free availability of ad-supported music streaming services, as well as the popularity of accessing music content on the likes of YouTube, are having an impact here.

46% of internet users say they prefer to access music through online services than buy it offline

This trend is most pronounced among younger internet users – with around half of 16-34s saying they access over ownership. But despite this preference then decreasing in line with age, a similar view is seen even among 45-64s. The same pattern emerges with control over music, with younger users keener to create custom playlists, while older users are more content to listen to it in the background. The ease with which smart devices can create background music could be key again here.

The Global Spread of Music Streaming

% of internet users who listen to/download music on the following

Asia Pacific		MEA		Europe		North America		Latin America	
QQ Music	31%	SoundCloud	44%	Spotify	23%	Spotify	26%	Spotify	47%
Kugou	25%	Anghami	20%	SoundCloud	8%	Pandora	26%	SoundCloud	13%
Kuwo	19%	Nogoum FM	13%	Deezer	7%	Amazon Prime Music	15%	Deezer	12%

Outside of China, Spotify is the leader among the major music streaming services, with a quarter of internet users listening via the service each month. Key to Spotify's continued success will be maintaining its ad-supported tier which has so far ensured that it boasts larger reach than any competitor. The attractiveness of an ad-supported model among potential users will likely assure it a place in Spotify's future monetization strategies, even if the functionality of its free tier is subject to change. Spotify's VP of Sales in Europe, Marco Bertozzi, has spoken about the challenge in convincing marketers of the targeting and multimedia capabilities of streaming over radio. Freemium music streaming providers like Spotify not only need to acquire users, but also convince advertisers that streaming is a worthwhile new medium with tangible returns.

1 in 5 users of music streaming services discover brands through pre-roll ads on videos – a blind-spot for streaming platforms.

As with Netflix and TV, attracting users through content desirable in each market is a significant barrier to overcome and one which makes certain regions tougher nuts to crack. MEA and APAC represent particularly challenging regions, with SoundCloud proving popular in Arabic markets and domestic laws in China ensuring that there are difficult barriers to outside competition there.

As of 2018, the current leading players in music streaming don't just have local competitors to think about; they also have to contend with Alphabet's latest **bid** to spin off a premium music service from YouTube, YouTube Music. Although previous attempts to create premium services from YouTube have had limited success, 37% of the internet population watched a music video on the service in the last month, giving Alphabet a big base to work with.
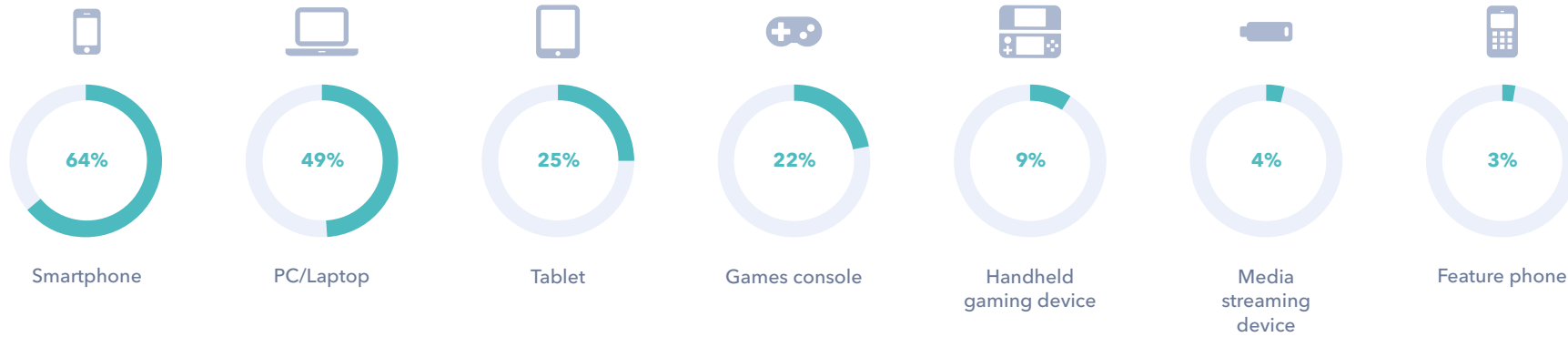
Gaming

Gaming

Smartphone	PC/Laptop	Tablet	Games console	Handheld gaming device	Media streaming device	Feature phone
64%	**49%**	**25%**	**22%**	**9%**	**4%**	**3%**

For years, gaming has played an increasingly prominent role in the entertainment industry. Recently, the pace has accelerated significantly: 86% of internet users report having gamed on at least one device. The widespread migration of gaming online, the emergence of online multiplayer platforms, and the popularity of freemium gaming platforms, both on mobile and PC, have largely driven this trend.

Of these devices, it's smartphones which dominate, helped by almost universal ownership at a global level. **This genre of entertainment is now among the most truly cross-demographic activities tracked by GlobalWebIndex.** In fact, thanks to mobile and PC gaming, it's difficult to find a region or demographic in which the majority of individuals aren't gaming in some form or another.

At least 7 in 10 internet users in all but one of our tracked markets use at least one device for gaming
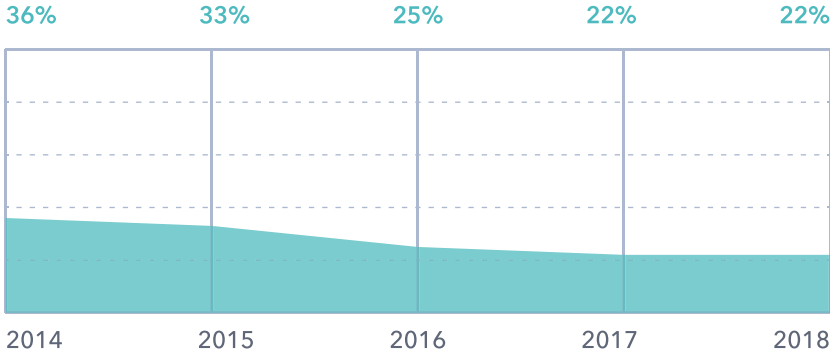
The Stabilizing Console Market

GAMES CONSOLE ENGAGEMENT
% who own a games console

36%	33%	25%	22%	22%

2014	2015	2016	2017	2018

TV ENGAGEMENT ON CONSOLES
% of Console Gamers who do the following on a games console

Watch TV in any form	19%
Watch subscription services such as Netflix	12%
Watch a TV channel's catch-up/on-demand service	7%
Watch television live as it is broadcast on a TV channel	6%

In recent years, we've reported a year-on-year decline in games console ownership. **But there are signs that this decline is stabilizing.** The decline has happened in tandem with a strategy from manufacturers to shift their focus to Western markets that have the greatest growth potential, best symbolised by Sony moving their PlayStation headquarters from Tokyo to California in 2016. **It also mirrors the rebranding of games consoles from simply devices to play games to multimedia entertainment hubs.**

Consoles now allow consumers to browse the internet, upload content to social networks, communicate with friends, listen to music, shop online and, importantly, engage with various forms of online TV. Within the console gaming community, consoles play a role in accessing TV content: 1 in 5 now watch TV in some form through their console. These added functionalities help explain why, despite dropping ownership figures, **we've seen the consistent increases in daily time spent on games consoles among internet users since 2012.**

With fewer owners of the hardware, and less revenue from sales, the strategic emphasis shifts to subscription services, with their guaranteed recurring income. **A third of internet users have used a subscription service on their console in the last month.** On the manufacturer front, Sony have taken the lead among internet users, with the PlayStation 4 and PlayStation 3 the most popular consoles, and the PS4 the most desired console for the next purchase.

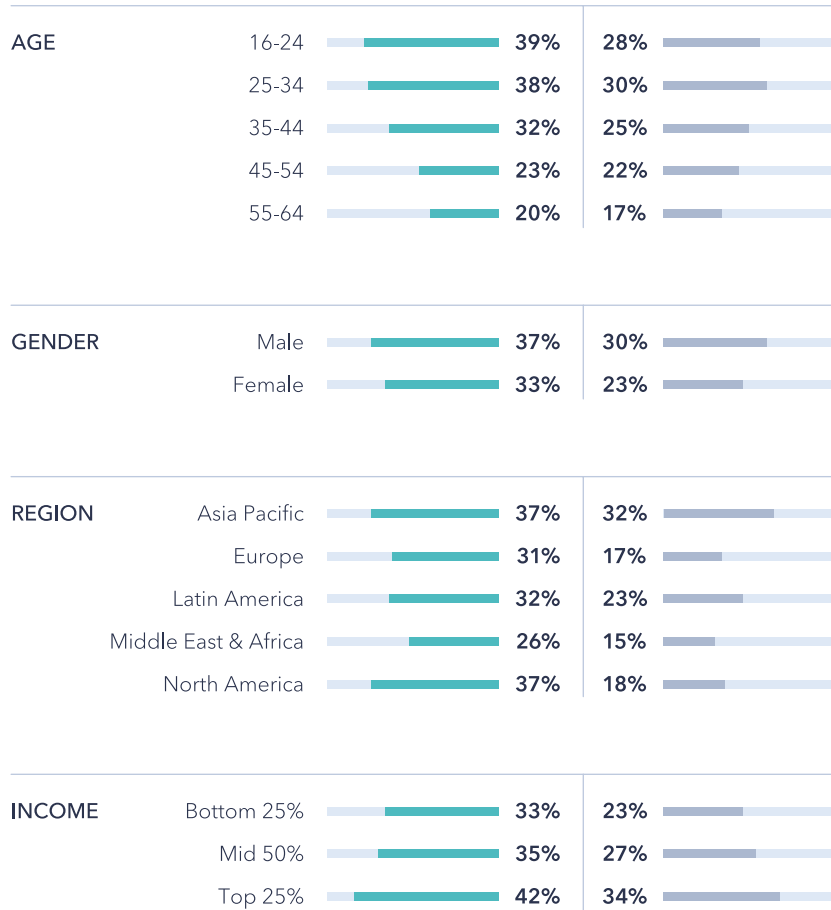## Although there are fewer console owners than 2014, they spend more time on them per day

Esports

% of console gamers who have done the following in the past month

● Watched a live gaming stream   ● Watched an esports tournament

AGE

	Watched a live gaming stream	Watched an esports tournament
16-24	39%	28%
25-34	38%	30%
35-44	32%	25%
45-54	23%	22%
55-64	20%	17%

GENDER

	Watched a live gaming stream	Watched an esports tournament
Male	37%	30%
Female	33%	23%

REGION

	Watched a live gaming stream	Watched an esports tournament
Asia Pacific	37%	32%
Europe	31%	17%
Latin America	32%	23%
Middle East & Africa	26%	15%
North America	37%	18%

INCOME

	Watched a live gaming stream	Watched an esports tournament
Bottom 25%	33%	23%
Mid 50%	35%	27%
Top 25%	42%	34%

Compared with where it stood a few years ago, **esports is now emerging as a more cohesive and mainstream genre of entertainment.** The last few years have seen further steps in its emergence into the mainstream. Activision Blizzard **established the Overwatch League**, a competitive and franchised competition which has offered a solid **base for advertising dollars**. The Overwatch League reached another milestone when its Grand Finals became the **first live competitive gaming** to be shown on ESPN at primetime.

1 in 5 16-34 console gamers watch esports tournaments. Its demographic is narrow but highly desirable: young, male, and skewing affluent. The bulk of gaming livestream watchers are currently from Asia Pacific, where markets like South Korea helped instigate the rise of spectator gaming.

Focusing on Gen Z (internet users aged 16-21) shows more of that generation are watching live gaming streams in Europe and North America than elsewhere. Gen Zers in the West trail for watching esports, but that only highlights the opportunity there is in converting livestream watchers into esports fans.

Entertainment

Brands and Entertainment

Brands and Entertainment

Entertainment has a crucial role to play in the discovery of new brands and products, whether that's TV, vlogs, or films. **Among our tracked brand discovery channels, TV ads are one of the most impactful of all,** with 37% reporting that they discover new brands or products from them. Spending the longest time watching linear TV each day, older age groups are most responsive to TV ads. 46% of 55-64s discover new brands that way, though 33% of 16-24s say the same.

27% discover brands via product placements in TV shows or movies. In contrast, cinema ads come in towards the bottom of the list. Even for those who go to the cinema each month, this share doesn't rise above the 20% mark.

Digital media has brought new challengers in commanding eyeball time, but how do these compare for brand discovery? If we look at vlogs and their core audience of Gen Zers (internet users aged 16-21), 56% have watched one in the last month, but only 16% say they discover brands through them. **For the time being at least, it doesn't look as if most vlog watchers see them as a place to discover brands.**
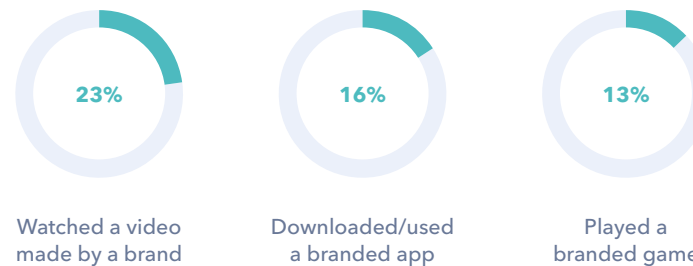
The ease with which digital media allows users to avoid ads on entertainment channels has shifted the emphasis somewhat onto brands to create their own entertainment. **A quarter of internet users have watched a branded video in the past month,** and there are a number downloading branded apps and playing branded games as well. They may be minority activities in their own right, but 4 in 10 internet users are doing at least one of the three each month. That's a significant slice of the online population looking to brands for entertainment, and shows the potential rewards in creating content that users actively want to seek out.

ADVERTISING AND ENTERTAINMENT

Ads seen on TV	**37%**
TV shows/films	**27%**
Ads seen before online videos or TV shows start to play	**18%**
Ads in magazines or newspapers	**17%**
Ads seen at the cinema	**14%**
Ads heard on the radio	**14%**
Vlogs	**11%**

BRANDED ENTERTAINMENT

% of internet users who have done the following in the last month

23%	16%	13%
Watched a video made by a brand	Downloaded/used a branded app	Played a branded game

Entertainment

Social Media and Entertainment

Social Media and Entertainment

As we've already seen, digital music and TV streaming services are growing. But these have a second home: social media. As part of a trend of social behavior moving from sharing status updates towards more purposeful activities, with 37% of internet users saying they go to social to find entertainment, **social media platforms are evolving into content hubs.** Since mid-2017 we've seen Facebook establish its **Watch** service and Instagram launch **IGTV**. Facebook also made a series of **acquisitions** in 2017 that revealed its interest in taking a stake of the music industry. This isn't an unprecedented move; Facebook's Russian equivalent, VK, has its own music streaming service, and Tencent-owned WeChat in China has been fully compatible with its parent company's music streaming streaming service, QQ Music, for some time.

44% of internet users have watched a video on social media in the past month

But it's sports that may be the trailblazer for entertainment on social. Thanks to the rise of livestreaming on social media, sports entertainment has quickly found a home across many of the major social platforms. 19% of internet users go to social media to follow sports events, rising to 40% for those personally interested in sport. **A quarter of the Sports Fans segment comment on social media while watching the action, so it makes sense to close the loop and provide the content as well as the commentary around it.** With Twitter hosting Major League Baseball fixtures, and Facebook becoming the first social media platform to take on rights for the EPL anywhere in the world with their successful bid to stream in South East Asia, sports content looks set to be a cornerstone of the social media industry's future strategies.

SOCIAL ENTERTAINMENT
% who typically use social media for the following reasons

To stay up-to-date with news and current events	**40%**
To fill up spare time	**39%**
To find funny or entertaining content	**37%**
To watch/follow sports events	**19%**
To follow celebrities/celebrity news	**18%**

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 400,000 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 GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education. To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

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

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 GlobalWebIndex'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 Q1 2018 wave of research across 42 countries, which had a global sample size of 109,780 (with 90,021 surveys completed on PC/laptop/tablet and 19,759 surveys completed on mobile).

Argentina	1,581	Ireland	1,250	Saudi Arabia	1,256
Australia	2,291	Italy	2,836	Singapore	2,517
Austria	1,326	Japan	1,791	South Africa	1,527
Belgium	1,301	Kenya	1,000	South Korea	1,280
Brazil	2,330	Malaysia	1,556	Spain	2,849
Canada	2,288	Mexico	2,602	Sweden	1,292
China	15,142	Morocco	1,000	Switzerland	1,265
Egypt	1,759	Netherlands	1,312	Taiwan	1,819
France	3,329	New Zealand	1,288	Thailand	1,533
Germany	2,906	Nigeria	1,000	Turkey	1,576
Ghana	1,000	Philippines	1,561	UAE	1,781
Hong Kong	1,787	Poland	1,833	UK	7,810
India	4,063	Portugal	1,310	United States	16,179
Indonesia	1,785	Russia	2,296	Vietnam	1,573

Notes on Methodology: Internet Penetration Rates

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 (GLOBALWEBINDEX'S FORECASTS FOR 2018 BASED ON 2016 ITU DATA)

Table below refers to the total population in each market

Country	Rate	Country	Rate	Country	Rate
Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.3%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%

Like what you've read?

There's plenty more where that came from. Browse our latest reports and infographics examining key consumer trends across markets.

Access More Reports
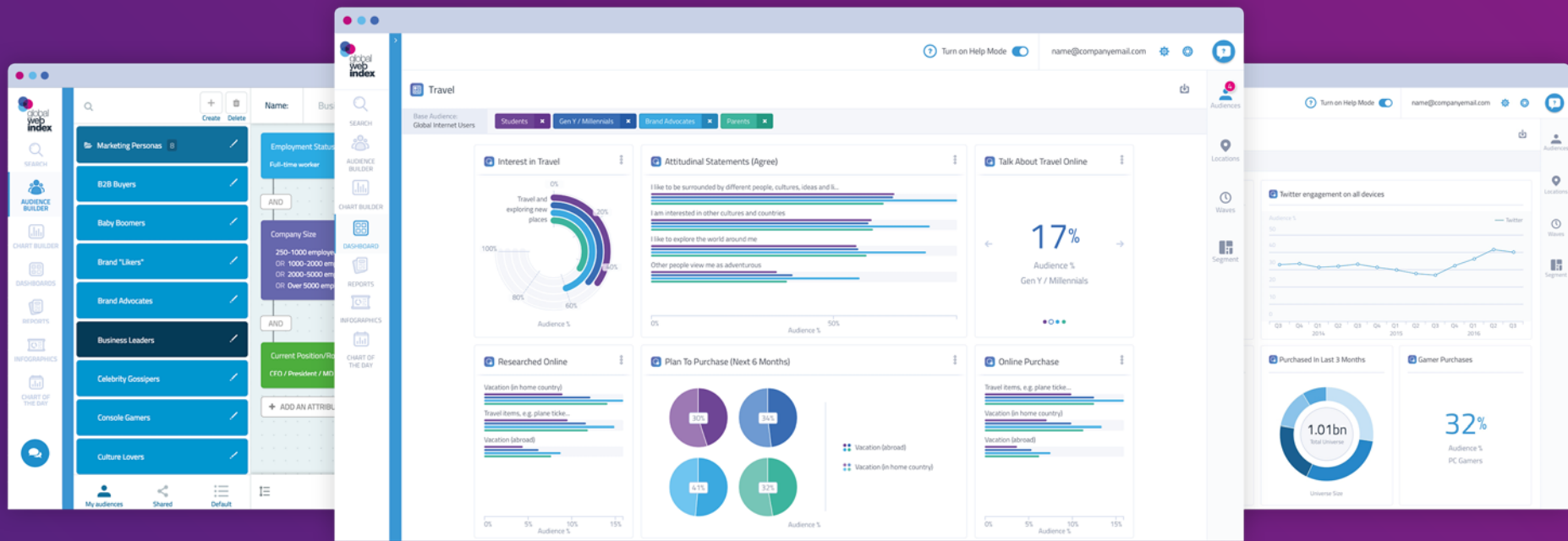
Get more from your data.

Run your own custom studies using our panel of 22 million consumers, and get instant access to insight tailored to your business needs.

Request Custom Research

Jason Mander

Chief Research Officer

jason@globalwebindex.com

@thejasonmander

Chris Beer

Trends Analyst

chris@globalwebindex.com

@ChrisBeerGWI