globalwebindex

# Voice Search

A deep-dive into the consumer uptake of the voice assistant technology.

INSIGHT REPORT 2018

www.globalwebindex.com

# Contents



# Introduction

In this report we take a deep-dive into the spread of voice-enabled devices, looking at who is using voice technology across devices and on smart speakers, along with the wider implications in the field of content, commerce and consumer privacy.

# Key Insights

**27% of the global online population is using voice search on mobile.**

It's most popular in Asia Pacific, but 16-24s in mature English-speaking markets aren't far behind.

**Mobile voice has the strongest ability to scale voice tech adoption at a continued rapid pace.**

This is because with between 40 to 60% of consumers planning to purchase a new mobile or upgrade their existing handset in the next 12 months, the majority of their new phones will have integrated voice assistants.

**17% of internet users currently own a voice-controlled smart assistant, and 34% say they are interested in purchasing one.**

That means almost half of digital consumers worldwide could be engaging with smart assistants in the future.

**Voice tech can seriously impact the commerce industry.**

This is the reason why Amazon has performed so well in the voice space in the U.S., as voice commands completely change the dynamic of how consumers carry out purpose-driven activities like buying online. This gives early adopter voice tech companies more power in consumer product choice by default, at least for now.

**Privacy is a major factor in voice tech.**

This largely falls down to unfamiliarity among consumers with how their data is stored and how they may access this data. Brands need to be transparent with consumers over data collection in voice tech.

## Voice Search

# Growth Prospects for Voice Tech

Insight Report 2018

# Growth Prospects for Voice Tech

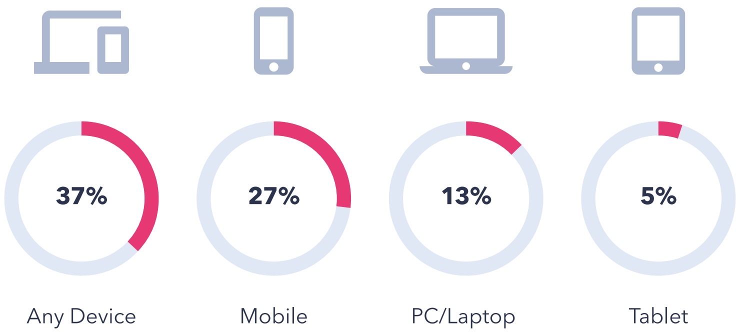
One of the most attention-grabbing trends of late has been the rapid adoption of voice tech. Brands are keen to understand whether they need to integrate with voice before it's too late, and it's becoming clear that **this is a trend which has the potential to reshape entire industry landscapes.**

There's no shortage of alternative voice tools on the market. From Apple's Siri and Microsoft's Cortana to Google Assistant and Baidu's Duer, consumers have a wide range of voice-powered search services at their disposal. **Voice-enabled smart speakers and voice assistants on mobile are the primary interfaces consumers use to engage with voice tools.**

So will this be a short-lived device like the Google Glasses, and if not then what are the wider implications of this trend relating to impacted industries and consumer privacy?

VOICE ASSISTANT USAGE BY DEVICE

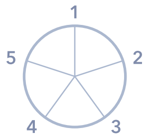
% who have used voice search or voice command tools in the past month via…



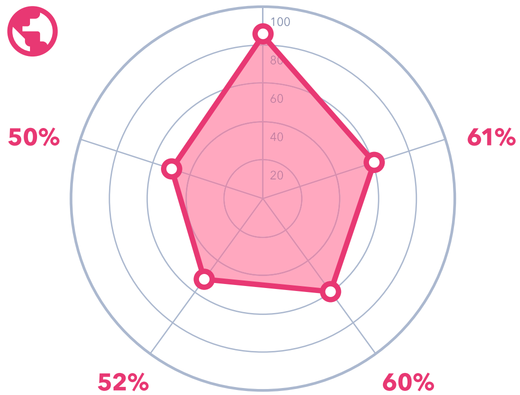

**Question:** In the past month, which of the following things have you done on the internet via any device?
**Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

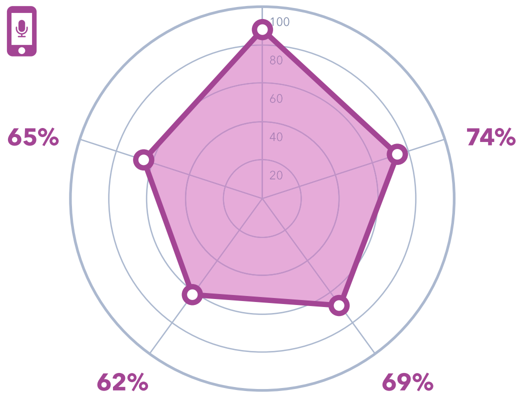
# Mobile Voice Search

ATTITUDES
% who say they agree with the following statements




1. When I need information, the first place I look is the internet
2. It's critical for me to be able to be contactable at all times in terms of my private life
3. I am constantly connected online
4. I feel more insecure without my mobile phone than my wallet
5. Having the latest technological products is very important to me




**For many consumers, their introduction with voice command tools is via their smartphone.**

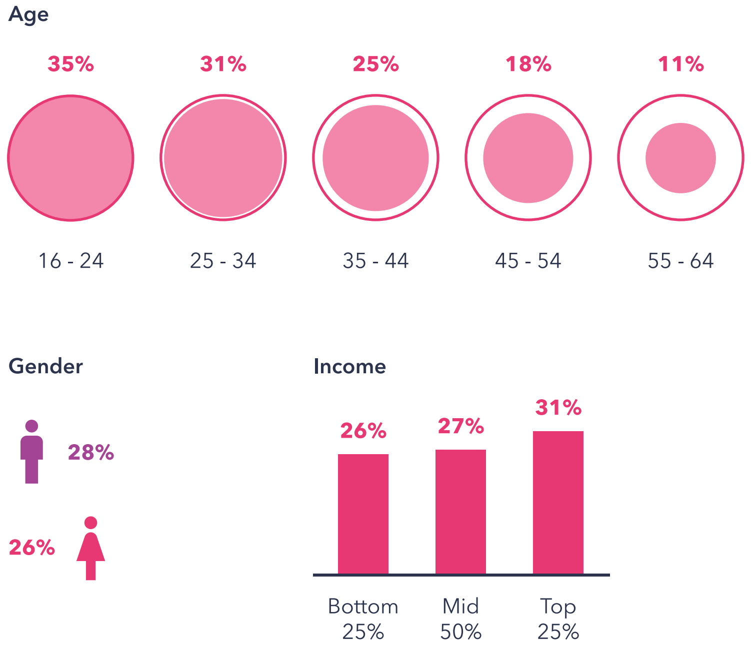
Virtually every internet user now owns a smartphone, and our data shows that 2 in 3 digital consumers cite their smartphone as their most important device for getting online. Having such a central role in everyday lives has meant that smartphones have given voice tech an important platform which caters to the unique value proposition of voice at the times when this value proposition is most impactful.

We can see from our data that **consumers are heavily reliant on the internet for information whenever they need it.** They also display a strong desire to be "connected" at all times and see their smartphone as an essential part of their day-to-day lives; more so than their wallets.

**Question:** To what extent do you either agree or strongly agree with these statements? **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

## DEMOGRAPHICS OF MOBILE VOICE USERS

% who have used voice search or voice command tools on their mobile in the past month




Mobile Voice Search Users are even more likely to agree with these statements, reflecting their younger age profile and how digitally-driven their lifestyles are.

When we break the mobile voice audience out by age, we see how **this a trend primarily driven by younger internet users.** In fact, more than 2 in 3 Mobile Voice Users fall within the 16-34 age bracket, giving us a clear indication of the trajectory of growth in the mobile voice market.

By gender, figures remain fairly even. This is an important point which demonstrates the universal appeal and application of voice command tools, especially on mobile. For other similarly digitally forward mobile activities in our research, like mobile payment usage or TV consumption, females tend to be slightly less engaged compared to males.

Despite the impressive engagement figures with mobile voice search, the fact that the higher income group is notably more likely to have used a voice command tool on mobile in the past month shows that some consumers may be priced out of the market. But **there is strong evidence to suggest that this disparity in engagement figures between age and income groups should narrow to some extent.**

**Question:** In the past month, which of the following things have you done on the internet via any device? **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

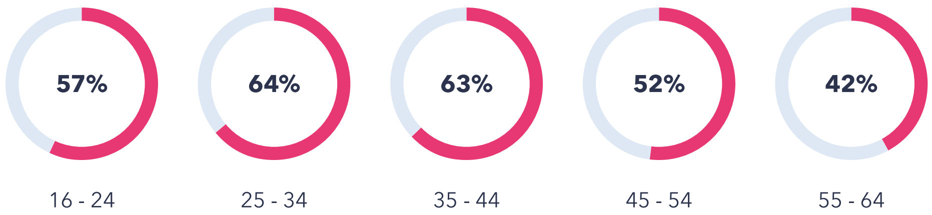
Around 6 in 10 internet users aged 16-44 plan to purchase a smartphone within the next 12 months, and it's over half of the 45-54 age group who plan to do the same. Even among the lowest earners it's still a considerable 59% planning to purchase a new smartphone in this timeframe.

With almost every internet user now owning a smartphone, together with a downward pressure on prices resulting from the rapid growth of Chinese smartphone brands in the West, competition in the mobile marketplace has heightened. This has put features previously reserved for flagships firmly within the mid-range market. Now, **the majority of all mid- to premium-end mobiles currently in the market already have integrated voice assistants,** and in most cases voice functionalities are made to be easily accessible and widely advertised on the smartphone interface. In this sense, the growth of voice tech on mobile is inextricably linked to the regular consumer habit of buying the latest smartphone. **The more consumers that fulfil their intention of upgrading their smartphone in the next year, the more opportunities voice has to demonstrate its value.**

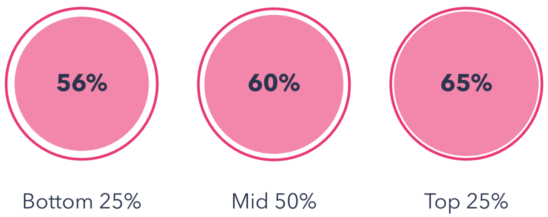
## MOBILE PURCHASE TIMEFRAME

% who say they plan to buy a new mobile phone or upgrade their existing phone in the next 12 months

**Age**




**Income**




**Question:** When do you plan to buy a new mobile phone or upgrade your existing phone? **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

## MOBILE VOICE USAGE BY MARKET

% who have used voice search or voice command tools on their mobile in the past month

● All Internet Users ● 16-24

| | | |
|---|---|---|
| Indonesia | 38% | 41% |
| China | 36% | 41% |
| India | 34% | 40% |
| Turkey | 33% | 35% |
| Thailand | 32% | 36% |
| UAE | 31% | 38% |
| Saudi Arabia | 27% | 32% |
| Mexico | 26% | 33% |
| U.S.A. | 25% | 34% |
| Philippines | 25% | 31% |
| Vietnam | 25% | 28% |
| Malaysia | 24% | 32% |
| Hong Kong | 24% | 38% |
| Taiwan | 23% | 28% |
| Italy | 21% | 33% |
| Brazil | 20% | 25% |
| Canada | 19% | 31% |
| Egypt | 19% | 25% |
| UK | 19% | 28% |
| Singapore | 19% | 27% |
| Spain | 17% | 25% |
| New Zealand | 17% | 24% |
| South Africa | 17% | 19% |
| Russia | 16% | 23% |
| Australia | 16% | 20% |
| Argentina | 16% | 21% |
| Ireland | 16% | 19% |
| South Korea | 15% | 23% |
| Switzerland | 14% | 23% |
| Sweden | 12% | 19% |
| Germany | 12% | 23% |
| Belgium | 12% | 28% |
| France | 12% | 26% |
| Austria | 11% | 18% |
| Japan | 11% | 18% |
| Netherlands | 10% | 24% |
| Poland | 10% | 16% |
| Portugal | 9% | 13% |

## More Mobile Upgrade Cycles Can Mean More Voice Tech Users

From a market-by-market perspective, our data plainly shows that **mobile voice search is being driven by Asian markets, with Indonesia (38%), China (36%) and India (34%) posting the strongest figures.** It's in these markets where fairly low-cost smartphones tend to boast the impressive specifications. But if we rebase this among 16-24s then we see figures climb significantly across mature markets like the U.S. (34%) and UK (28%), as well as in other countries Europe and Latin America.

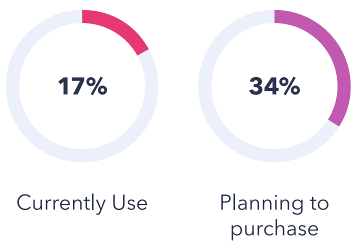
**Question:** Within the past month, which of the following things have you done on the internet via any device? **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

# Voice-Controlled Smart Speakers

Voice-controlled smart speakers have rapidly captured the attention of consumers. From Amazon's Echo, to Google Home, Apple Homepod and Alibaba's Tmall Genie in China, there's no shortage of competitors in the market.

SMART SPEAKER ADOPTION

% who currently own/plan to purchase a voice-controlled smart assistant/speaker



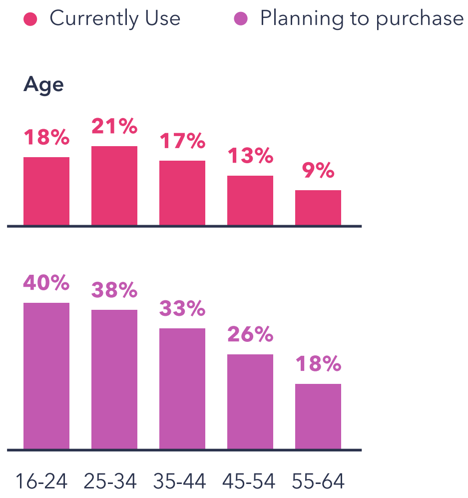

**Although just 17% of internet users currently own a voice-controlled smart assistant, there's also 34% who say they are interested in purchasing one.** That means almost half of digital consumers worldwide could be engaging with smart assistants in the future. This is a huge opportunity given that fast-growth markets and mature markets are adopting this tech at different rates, yet we still see nearly half of the world's digital audience is engaged with these products.

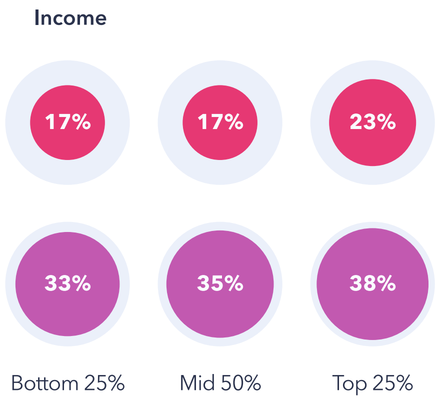
**One of the biggest obstacles smart speakers have faced is in convincing consumers that they are an essential rather than a nice-to-have device.** As mentioned above, mid- to premium-range smartphone capabilities have improved significantly, and as these capabilities continue to become more sophisticated with each new generation of handset, smart speakers will need to demonstrate what value they bring that justifies an additional spend. In a sense, smart home speakers need to overcome some of the same obstacles that derailed smart glasses – a device with a premium price-point that struggled to demonstrate what it did better than a smartphone.

This is an obstacle, however, which is becoming increasingly obsolete in light of the fact that the majority of smart speakers have allowed developers to create their own "commands" or "skills" for consumers to make use of. Crucially, **this has given brands in every industry the chance to give consumers more opportunities to engage or purchase from their brand in a convenient and ultra-streamlined way.**

SMART SPEAKER ADOPTION

% who currently own/plan to purchase a voice-controlled smart assistant/speaker




**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 Q1 2018 **Base:** 90,021 internet users aged 16-64

Similar to mobile voice, ownership and intent to purchase is concentrated among younger age groups, but it's still a significant number of older consumers who say that they plan to purchase one of these items in the future. Clearly, **there is a widespread awareness of how these devices can bring value into everyday activities which spans across age and income groups.** A key factor in increasing this awareness has been aggressive promotional and discount periods during holiday seasons – especially from the likes of Amazon – in ensuring that these devices are available even to the more modest budget.

It's important to note here that **this pronounced interest in smart speakers has largely outlived the "hype" period of these devices as they enter their fourth year on the market.** Having shrugged off any doubts as to their short-term growth prospects, this continued interest gives a promising outlook as to the longevity and consumer use cases of these devices.

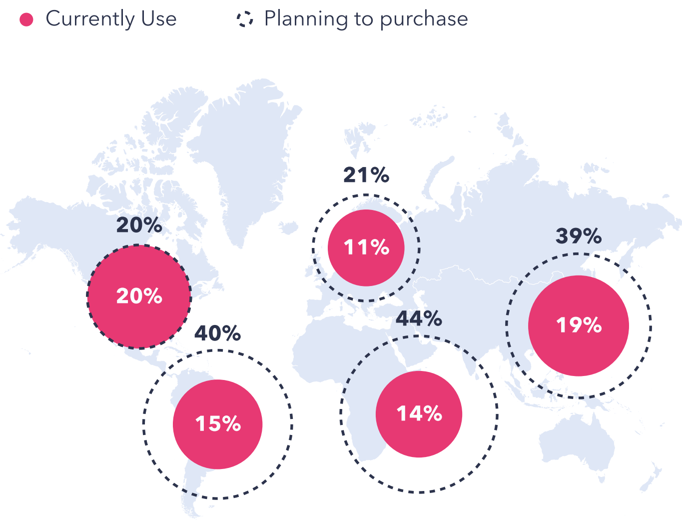
**The opening up of "skills" and "commands" to brands and developers has led to the exponential growth of these use cases.** This will be one of primary drivers of ownership growth in the smart speaker market as more and more household activities become enriched by the addition of voice commands.

North America leads the charge for smart speaker adoption, with the U.S. being the home market for manufacturers of many of the main smart speaker companies. In fact, **as many as a quarter of 16-44s in the U.S. currently own a smart speaker, and with a similar number planning to purchase one in the future there is a high likelihood that this purchase intent will translate into ownership.**

Asia Pacific also posts very strong figures, a consequence of relatively lower price points for devices in this region, with Alibaba's Tmall Genie retailing for well under $100, for example.

## SMART SPEAKER ADOPTION BY REGION

% who curretly own/plan to purchase a voice-controlled smart assistant/speaker




**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 Q1 2018 **Base:** 90,021 internet users aged 16-64

## Voice Search

# The Bigger Picture for Voice Tech

Insight Report 2018

# Commerce: Retail

### ONLINE PURCHASE DRIVERS

% of Voice Tech Users who say that the following would increase their likelihood of purchasing a product online

| | % | INDEX |
|---|---|---|
| Free delivery | 54% | 0.90 |
| Coupons and discounts | 42% | 0.91 |
| Easy returns policy | 35% | 1.02 |
| Reviews from other customers | 35% | 0.99 |
| Next-day delivery | 32% | 1.11 |
| Loyalty points | 32% | 1.06 |
| Quick / easy online checkout process | 31% | 1.04 |
| Lots of "likes" or good comments on social media | 25% | 1.23 |
| Ability to pay with cash on delivery | 23% | 1.13 |
| Entry into competitions | 19% | 1.18 |
| Exclusive content or services | 19% | 1.34 |
| Click & Collect delivery | 19% | 1.34 |
| Live-chat box so you can speak to the company | 18% | 1.35 |
| "Guest" check-out (with no sign-in required) | 17% | 1.20 |
| Option to use "buy" button on a social network | 16% | 1.48 |

## 3 in 4 Mobile Voice Searchers purchased a product on their mobile last month

It's not difficult to see why commerce is such a strategic priority in the voice market. **Amazon has one of the largest stakes in the voice industry, and also boasts the most visited online retail site globally by a significant margin.** On top of this, Amazon's Prime subscription service, which ties in with its Alexa product, offers all kinds of purchasing incentives to consumers as well entertainment offerings. When an Alexa user wants to buy batteries, for example, **Alexa will automatically route that transaction via Amazon's retail website.** This new form of retail strategy has forced the hand of other major retailers who have been quick to realize its implications, leading to cases such as Google Assistant and Walmart partnering together on voice-based shopping.

This new kind of competition has certainly worked in Amazon's favor so far. With Amazon having a substantial presence in the majority of our tracked markets, **the growth of Alexa ownership in these markets coupled with the growth in Prime subscriptions could seriously reshape the global commerce landscape.** One of the frontiers opened up by voice tech is an ultra-streamlined path to purchase, something which holds considerable appeal among consumers thanks to the spread of omnichannel commerce and m-commerce.

Although convenience factors in heavily among Voice Tech Users in their likelihood of completing a purchase, our data shows that **voice commerce actually has a wider role to play.**

The biggest over-indexes are quite telling here, but they also point towards a deeper engagement with products bought through voice; click and collect delivery shows that delivery should be flexible and not just geared towards the home, and a live-chat box shows that customer support is appreciated during the purchase journey as well. Clearly, using voice tech as a purchase channel requires thinking beyond the buy. The path to purchase may be quicker than ever, but brands shouldn't overlook the engagement consumers want from products around the purchase.

**Question:** When shopping online, which of these features would most increase your likelihood of buying a product? **Source:** GlobalWebIndex Q1 2018 **Base:** 34,880 Voice Tech Users aged 16-64

# Commerce: Grocery Shopping

GROCERY SHOPPING: ONLINE BUYING VS. RESEARCHING

% of internet users who do the following in their grocery and houshold shopping


Given that voice search needs to serve a function in everyday activities, and ultimately provide the consumer with better ways of carrying out these activities, grocery shopping has quickly emerged as another frontier in voice-based commerce, especially in the U.S..

Our data shows that cheaper items like groceries are bought online more than they are researched. With less online research for these products, this lends itself well to voice commerce, as it best fits as-and-when buying, responding promptly to consumer needs. With **22% of internet users who buy grocery products using smart assistants, there's already a device base for these consumers.**

## Grocery products look like the gateway to drive voice commerce

Product comparison works under a slightly different set of rules when consumers choose to purchase an item using a voice assistant. As such, the big players in grocery retail are competing to take advantage of this new retail channel. By extending Amazon Prime to Whole Foods, and selling Echo devices in their stores, Amazon have shown their ambition to integrate online and offline platforms, while Walmart's personalized shopping initiative on Google Home devices also reflects this industry shift. **As more home appliances - and particularly kitchen appliances - are connected online with voice assistants like Alexa, it could be the case that the top players in the voice industry will also become the dominant names in the grocery industry too.**

**Question:** Which of the following have you purchased online in the past six months? // Which of the following have you researched online prior to purchasing? **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

## Voice Search

# The Consumer Privacy Factor

Insight Report 2018

# The Consumer Privacy Factor

## ONLINE PRIVACY

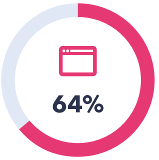
% of Voice Tech Users who agree with the following statements

**70%** I am concerned about the internet eroding my personal privacy

**65%** I worry about how my personal data is being used by companies

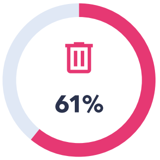
% of Voice Tech Users who have done the following in the past month

INDEX 1.36



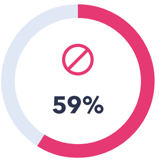

Used a private browsing window

INDEX 1.23



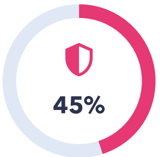

Deleted cookies from your internet browser

INDEX 1.30




Used an ad-blocker to stop ads being displayed

INDEX 1.57




Used a Virtual Private Network (VPN) or Proxy Server

**Many of the benefits of voice tech – and particularly smart speakers – would not be possible without non-targeted data collection at scale.**

In order to respond to a user's command at any given moment, **voice assistants within smartphones or smart speakers typically employ "active listening" tools** which use the device's microphone at all times to listen for a "wake word". These wake words trigger the voice assistant into action, at which point these assistants will usually begin recording the interaction.

Despite assurances from brands, many consumers remain unconvinced that these devices only begin recording after the wake word is uttered. This skepticism has been fueled by numerous instances in which smart speakers seem to have carried out privacy-breaching actions without the wake word being spoken.

There is also concern from regulators over how transparent voice tech companies are with consumers over how their data and recordings are stored and how the consumer can access or delete these. Given that voice-enabled devices with vast data collection capabilities are required to be continuously listening, **this gives them – and especially smart speakers within the home – access to personal information regarding the consumer's offline experience.**

Our data shows that **Voice Tech Users are already acutely aware of their online footprint** – 70% are concerned about the internet eroding my personal privacy with two thirds saying they worry about how their personal data is being used by companies.

They are also clearly inclined to take measures in controlling their personal information. 64% of this audience are using "private browsing" functionalities and 61% are deleting cookies. Also, it's 59% who are ad-blocking and almost half deploying VPNs each month. In each case, Voice Tech Users are significantly ahead of the curve for using these tools too.

**The balance between convenience, privacy and security for new technologies like voice search often rests upon brands being transparent with their customers.** Educating them about the value exchange between data collection and meaningful interactions for consumers will be especially important as voice expands its presence throughout homes worldwide.

**Question:** To what extent do you either agree or strongly agree with the statements below? // Which of the following have you done in the last month? **Source:** GlobalWebIndex Q1 2018 **Base:** 34,880 Voice Tech Users aged 16-64

# Future Implications

**Voice assistant skills must fill a gap.**

The opening up of "skill" and "command" building to third-party developers has helped smart assistants to prove their usefulness in many areas of day-to-day lives. With this in mind, brands should refrain from adopting new technology for the buzz it can create among consumers. They should instead solve a problem and maximize the ease effect brought by the new technology.

**Social will make an impact in this space.**

Any time Facebook sees an opportunity for new social experiences, it springs into action. The company is already reported to be working on its own smart speaker that has the potential to tie all its threads together – from Instagram all the way to Marketplace. And just as it partnered with businesses on Messenger, it's easy to see how it could partner with retailers in the same way that Amazon and Google have done.

**Brands need to maximize transparency in the technicalities of voice.**

Companies behind voice tools need to be proactive in letting consumers know in simple language how these devices collect and store information, and how the consumer can access and delete this data. This will be key in driving further uptake.

**Amazon is ahead of the game.**

Quite simply, Amazon's long running investments in different industries are now being connected through its foray into voice. This puts traditional competitors of Amazon as well as new ones at a serious disadvantage if they do not act quickly and forge partnerships with willing other voice assistants.

**Smart speakers have captured the consumer imagination, but their sustained global growth hangs on affordability.**

Amazon and Google have exploited this consumer imagination in their aggressive pricing strategies helping to rapidly propel the smart speaker industry in mature markets. Similar to its role in the smartphone market, Chinese answers to smart speakers from Alibaba and Xiaomi will offer even more affordable devices which could spread to other parts of Asia thanks to Alibaba's growing influence in the region.

# 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 | 2,836 | Saudi Arabia | 2,849 |
| Australia | 2,291 | Italy | 1,791 | Singapore | 1,292 |
| Austria | 1,326 | Japan | 1,556 | South Africa | 1,265 |
| Belgium | 1,301 | Kenya | 2,602 | South Korea | 1,819 |
| Brazil | 2,330 | Malaysia | 1,312 | Spain | 1,533 |
| Canada | 2,288 | Mexico | 1,288 | Sweden | 1,576 |
| China | 15,142 | Morocco | 1,561 | Switzerland | 1,781 |
| Egypt | 1,759 | Netherlands | 1,833 | Taiwan | 7,810 |
| France | 3,329 | New Zealand | 1,310 | Thailand | 16,179 |
| Germany | 2,906 | Nigeria | 2,296 | Turkey | 1,573 |
| Ghana | 1,787 | Philippines | 1,256 | UAE | 1,285 |
| Hong Kong | 4,063 | Poland | 2,517 | UK | 7,815 |
| India | 1,785 | Portugal | 1,527 | United States | 15,780 |
| Indonesia | 1,250 | Russia | 1,280 | Vietnam | 1,557 |

# 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

GlobalWebIndex's Forecasts for 2018 based on 2016 ITU data

Internet Penetration Rates: GlobalWebIndex Versus ITU Figures

| | | | | | |
|---|---|---|---|---|---|
| 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% |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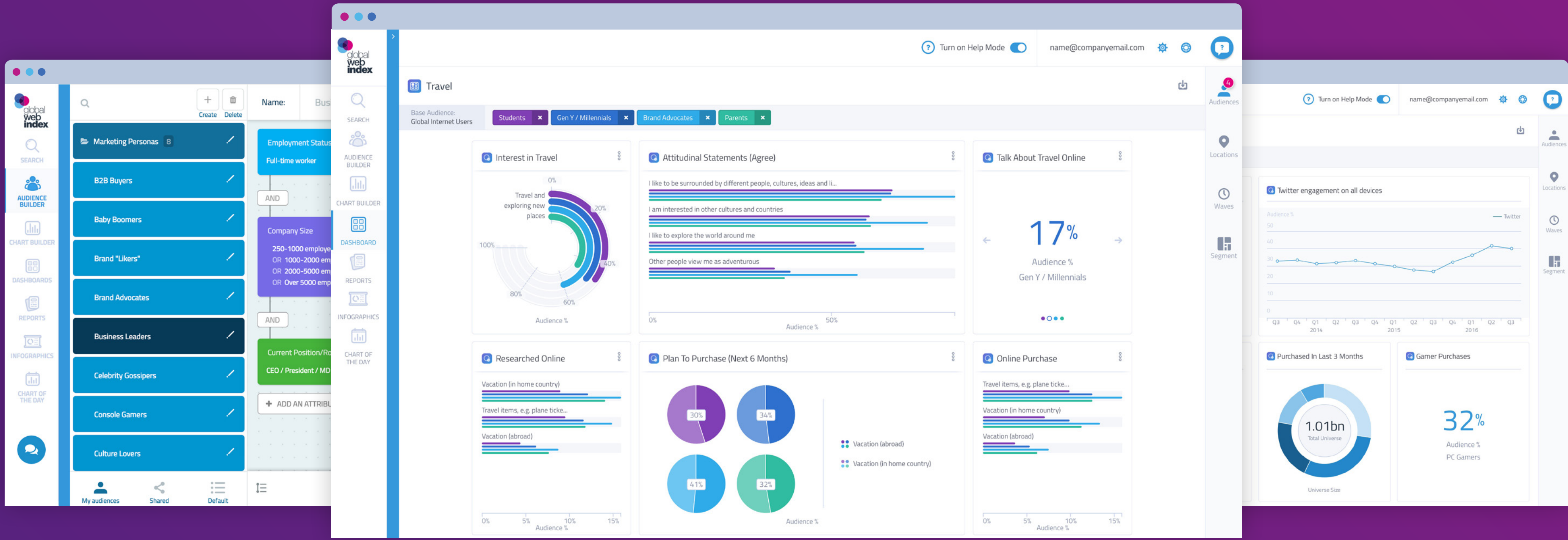


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