globalwebindex

Gen X

Examining the attitudes and digital behaviors of internet users aged 37-55

AUDIENCE REPORT 2019

www.globalwebindex.com

Contents

Introduction

GlobalWebIndex Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audiences in question compare to the overall internet population. In this report, we place the spotlight on Generation X – those internet users who are aged 37-55.

This report focuses on:

- **Profiling Gen X** – from their attitudes and outlooks on the world to their interests, what are the defining characteristics of this group?
- **Device** – how do their online activities differ across devices?
- **Media Consumption** – where do Gen X spend most of their time online and offline?
- **Social Media Engagement** – what are Gen X's favorite social media platforms and who do they prefer to "follow" on these services?
- **Commerce and Brand Engagement** – how many are shopping online each month and how does this audience discover and interact with brands while online? What can brands do to appeal to a Gen X?

Key Insights

PCs, laptops and tablets may collectively continue to capture the biggest share (56%) of Gen Xs' daily time online, but **mobiles have made great headway in becoming the go-to device for this generation**, who are slowly becoming just as attached as millennials.

Smartphones overtook PCs/laptops as the primary device to access the internet in 2017, and now have a considerable lead. **Gen Xs are more likely to reach for a mobile than a PC/laptop across the research, purchase and post-purchase phases of the journey**, with the most significant difference at the early research stage of the purchase funnel.

Broadcast TV is still the biggest source of entertainment for Gen Xs, but that's not to say they haven't embraced digital. In fact, **a third of daily time spent watching TV-based content is dedicated to online TV/streaming services**, and 1 in 4 paid for a TV or movie streaming service last month, showing they're actively engaging with and paying for this new media. However, **they are relatively slower on the online TV uptake**.

In line with wider global trends, **YouTube is the platform they're most likely to be visiting monthly. Facebook, however, sits 7 percentage points ahead of YouTube for membership**. Facebook is often the default starting-point for consumers in the social media landscape, but is also likely to be the first platform Gen Xs joined when it launched over a decade ago. **When we look at the number of Gen Xs self-reporting as actively engaging or contributing with the platforms, Facebook also comes out on top.**

While for most younger consumers social media platforms have now evolved into entertainment hubs, this is less evident for Gen X. Going to social media to find funny or entertaining content has seen large increases for Gen Z and millennials, but for Gen X has consistently remained around the 30% mark. **Many of their most cited motivations for going on social media are distinctly socially-driven rather than content-driven.** Using social media to keep in touch with friends, fill up spare time and to generally network with others, all feature in their top five motivations.

Traditional marketing channels are still the most impactful for brand discovery. Search engines and TV ads are the top two ways they come across new brands, products or services. These are particularly impactful sources for Gen Xs in North America – a region where linear TV is still very important in daily media schedules – but are also important in Latin America and Europe.

Gen X

Profiling Gen X

Gen X Around the Globe

% of internet users who are Gen X

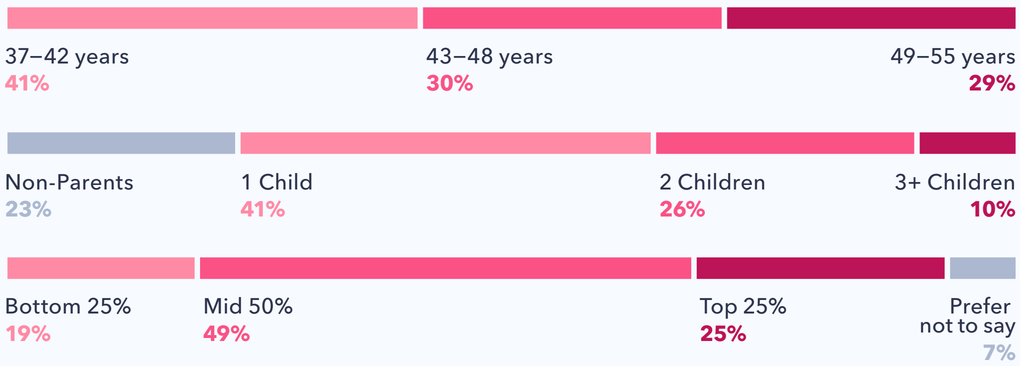
TOP 3 INSIGHTS

71% are married

11% are senior decision-makers

53% are most likely to be interested in news/ current affairs

% of Gen X who are the following…



- **64%** Full-time worker
- **7%** Part-time worker
- **12%** Self-employed/Freelancer
- **5%** Full-time/stay-at-home parent
- **1%** Student
- **6%** Unemployed
- **3%** Retired
- **2%** Other

TOP 5 ATTITUDES

Family is the most important thing in my life	82%
When I need information, the first place I look is the internet	80%
It is important to be well informed about things	78%
It is important to me to continue to develop new skills throughout life	77%
You should seize opportunities when they arise	76%

Gen X, those born between 1964 and 1982, often get ignored next to the massive influence of boomers, millennials and Gen Zs. While Gen X may be smaller in numbers than millennials, they may well be in a better position to be big spenders over the next decade.

Gen X were the first generation where, as a majority, both parents worked and were out of the house most of the day. They came along at a time when the divorce rate was dramatically rising, leading to more single-parent households and more independent decision-making children. They saw the Berlin Wall fall, the Cold War end, Communism disintegrate and the end of Apartheid in South Africa, all to a backdrop of grunge and disillusionment.

The Generational Traits of Gen X: Expectation vs Reality

Here are 9 common characteristics assumed to be prevalent among people between 37-55, based on world events they've lived through and the life stage they are likely at now. Being the last non-digitally globalized generation, Gen X's most formative years were before the internet. This means that, especially compared with younger generations like millennials, they may not have the same cultural commonalities between others of the same age in other regions. But what does our data say?

1. Living through the recession, they have a negative outlook on the global economy.

This isn't necessarily true of Gen X. 23% disagree that they are positive about the global economy, which is higher than both Gen Z and millennials (both 19%) but behind baby boomers (29%). A lack of positivity in the current economy generally increases with age, the exception being in Latin America, where Gen Zs are more likely than Gen Xs to disagree about being positive about the economy.

2. They are independent thinkers.

32% are easily swayed by other people's opinions, compared to 42% of Gen Z, 40% of millennials and 20% of baby boomers. Additionally, 42% say they like to keep up with the latest fashions. This figure is massively inflated by Gen Xs in APAC, where 44% agree to being swayed by others' opinions. In Europe, Latin America and North America, this drops to below 20%.

3. They continue to struggle with debt.

Gen X (23%) are just behind millennials (26%) for currently having a short-term loan. 7 in 10 Gen Xs have a credit card, ranging from 55% in the Middle East and Africa to 81% in North America.

4. Being the first to adapt to the internet, they have long standing habits online.

Smartphones overtook PCs/laptops as the primary device to access the internet in 2017, and now have a considerable lead. Out of the 35 online activities we track, Gen X are now more likely to carry out all of them but two on their mobile. In three regions - APAC, MEA and LatAm - Gen Xs have nearly an even split between the time they spent on mobiles and PCs/laptops.

5. Their music preferences relate to the music of their youth.

They are the most likely generation to cite '90s music as a genre they enjoy listening to (45%). They're also 1.4x the global average to say they like '80s music (49%), although this is behind boomers (57%). In all five regions, '80s music is their most cited music genre that they enjoy.

6. Skilled and highly experienced Gen Xs can benefit from the growing gig economy.

Out of all four generations, Gen Xs are the most likely to say they are currently self-employed/a freelancer (12%, IDX 1.21). A substantial 23% of Gen Xs in Latin America and 19% in the Middle East and Africa say they are a freelancer.

7. They are the main shopper at home.

Gen X are the generation most likely to be the main grocery shopper in their household – 66% say they are. This figure is fairly consistent across the regions. 76% of Gen X say they have purchased a product online using any device, just eclipsing Gen Z (74%), but behind millennials (79%).

8. They spend more on specialty food as they focus on family life.

Gen Xs are just as likely as Gen Zs to say they tend to buy the premium version of a product (53%), but behind millennials (57%). 4 in 10 have purchased organic fruit/vegetables in the past month, rising to 60% in Latin America.

9. Email marketing communications are an effective channel for this group.

This is debatable. While emails or letters from companies comes 17th in brand discovery preferences (17%), although it is one of their most cited and highest indexing brand interactions in the past month (24%).

Gen X

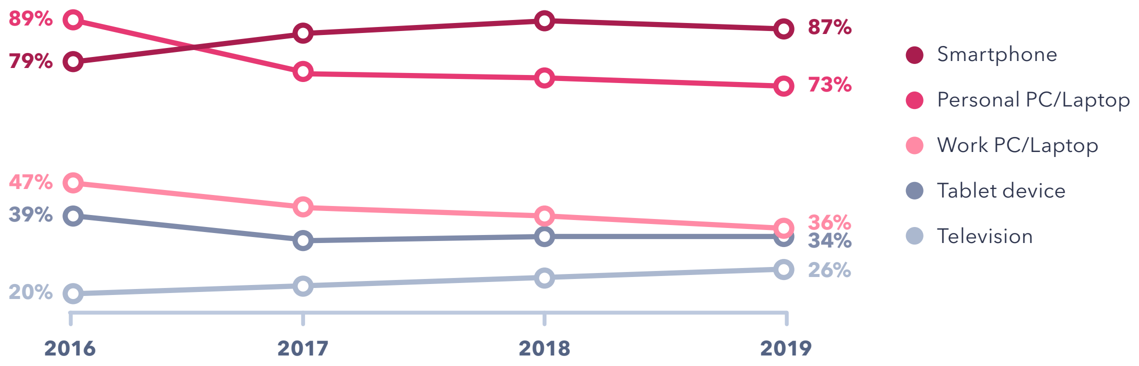
Device Trends

Smartphones Fully Embedded into Gen Xs' Lives

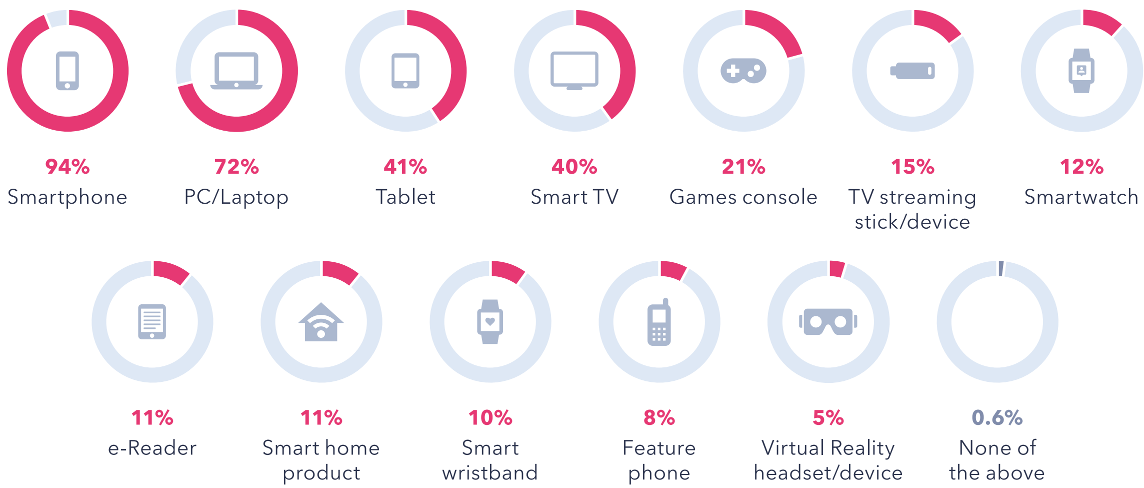
3:21 AVERAGE TIME SPENT PER DAY **ON PC/LAPTOP/TABLET**

2:41 AVERAGE TIME SPENT PER DAY **ON MOBILE**

% of Gen X who access the internet via...



% of Gen X who own the following devices



PCs, laptops and tablets may collectively continue to capture the biggest share (56%) of Gen Xs' daily time online, but **mobiles have made great headway in becoming the go-to device for this generation**, who are slowly becoming just as attached as millennials.

Smartphones overtook PCs/laptops as the primary device to access the internet in 2017, and now have a considerable lead. In fact, **out of the 35 online activities we track, Gen X are now more likely to carry out all but two of them on their mobile**. PCs/laptops are slightly ahead for using a webmail service to access emails and to use online encyclopedias such as Wikipedia.

Computers still retain importance for this group however, particularly for commerce-related actions. 64% have used these devices to visit an online retail site like Amazon in the past month (vs. 54% of Gen Z), 53% have searched for a product or service they wanted to buy (vs. 42% of Gen Z), and 45% have purchased a product online (vs 31% of Gen Z).

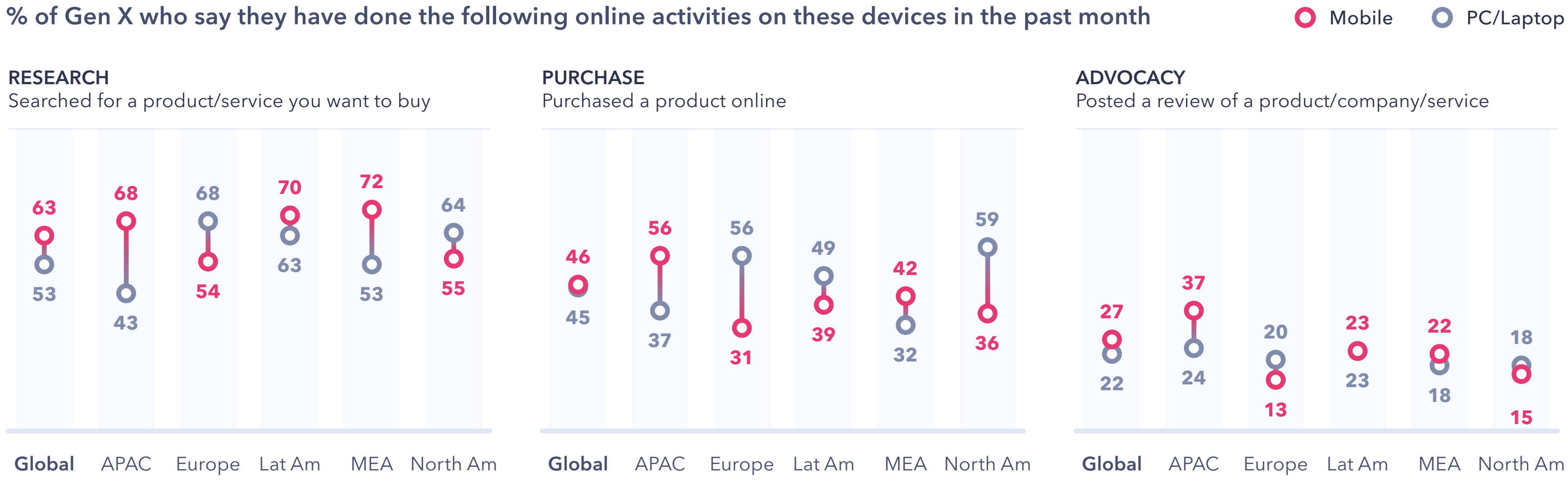
4 in 10 Gen Xs have used an internet banking service on their PC/laptop in the past month.

Question: Which of these do you use to access the internet? **Source:** GlobalWebIndex Q1 2019 **Base:** 49,253 Gen X Internet Users aged 37-55

Question: On an average day, how long do you spend online on a mobile? **Source:** GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

Mobile is the Key to the Purchase Journey

% of Gen X who say they have done the following online activities on these devices in the past month



Many assume that younger generations have driven the upswing in ecommerce, but **Gen X have actually been a key force, being among the first to adopt online shopping behaviors**. Three-quarters made a purchase online last month, and just as their attachment to mobile is evident elsewhere, it's a key device throughout the purchase journey too.

If we look at the global average, Gen Xs are more likely to reach for a mobile than a PC/ laptop across the research, purchase and post-purchase phases of the journey, with **the most significant difference at the early research stage of the purchase funnel**.

If we split across the world regions, the picture is significantly different. Generally, mobiles have the lead in APAC, LatAm and MEA regions, where consumers are typically more mobile-centric. The majority of Gen Xs are in Europe and North America – where internet penetration is higher and consumers tend to be slightly older – are still more likely to be reaching for a desktop for these activities in the consumer journey. This is the generation at the linchpin of online activities transitioning to mobile in more mature markets – **once mobile has saturated among this generation, it will have overcome the most significant milestone in the journey of mobile overtaking PCs/laptops in every region**.

PCs/laptops close the gap significantly at the actual point of purchase – possibly a result of the perceived security of these devices compared to mobiles, especially as 63% of Gen Xs are privacy-conscious *(to learn more about our attitudinal segmentations, please click **here**)*.

Question: In the past month, which of the following things have you done on the internet via any device?
Source: GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

Gen X

Media Consumption

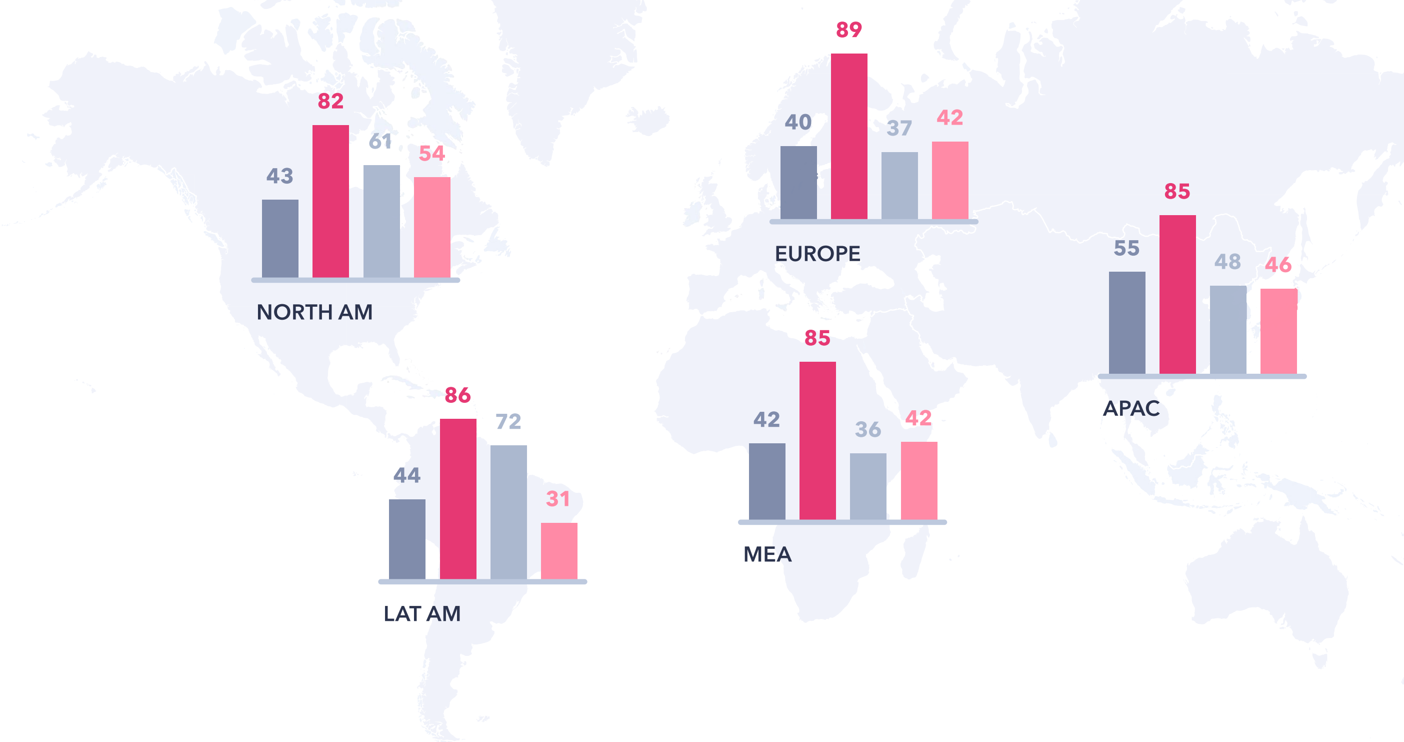
One-Third of TV Time Dedicated to Online TV

2:15 AVERAGE TIME SPENT PER DAY **ON LINEAR TV**

1:08 AVERAGE TIME SPENT PER DAY **ON ONLINE TV**

% of Gen X who watch the following TV types at least weekly

- Watch a TV channel's catch-up/on-demand service
- Watch subscription services such as Netflix
- Watch live television on a TV channel
- Watch shows that you have recorded from TV



Broadcast TV is still the biggest source of entertainment for Gen Xs, but that's not to say they haven't embraced all things digital. In fact, **a third of daily time spent watching TV-based content is dedicated to online TV/streaming services, and 1 in 4 paid for a TV or movie streaming service last month**, showing they're actively engaging with and paying for this new media. However, **they are relatively slower on the online TV uptake; it's linear TV consumption that has increased since Q4 2017**, by 8 minutes per day on average.

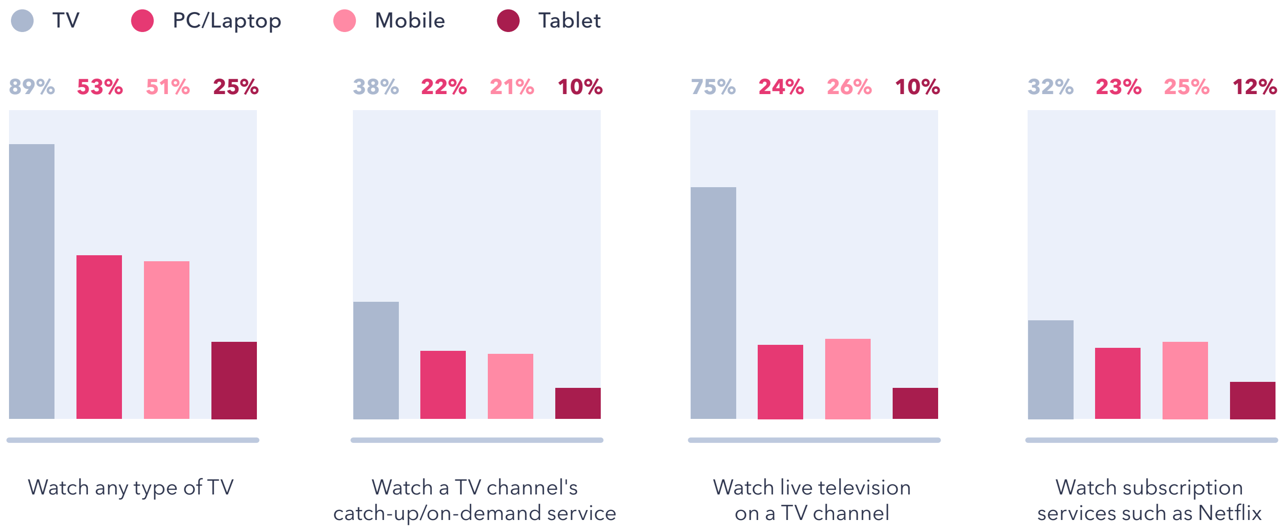
Online TV consumption among Gen Xs hits a high of 1 hour and 21 minutes a day in APAC and low of 42 minutes in Europe. Meanwhile, Europe leads for weekly viewership of live television (89%), whereas Latin America leads for subscription services (72%).

Question: How often do you... // On an average day, how long do you spend online on a mobile?
Source: GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

TV: Device Preferences

25% OF GEN Xs HAVE WATCHED CONTENT ON A TV BY **MIRRORING OR CASTING** IT VIA THEIR PHONE

% of Gen X who watched these TV types last month via



Where device preferences are concerned, **Gen Xs continue to demonstrate an overwhelming preference for the traditional TV set, particularly when watching live television**. PCs and laptops achieve decent figures in Latin America and APAC, however.

Although marketers seem to focus more of their efforts on the younger Gen Z or Millennial cohorts, this pattern of Gen X media consumption indicates that this generation are moving with digital media trends too, and are actually not too far behind the global pace – with the strongest indicator being that **51% are now watching some kind of TV-based content on mobile**.

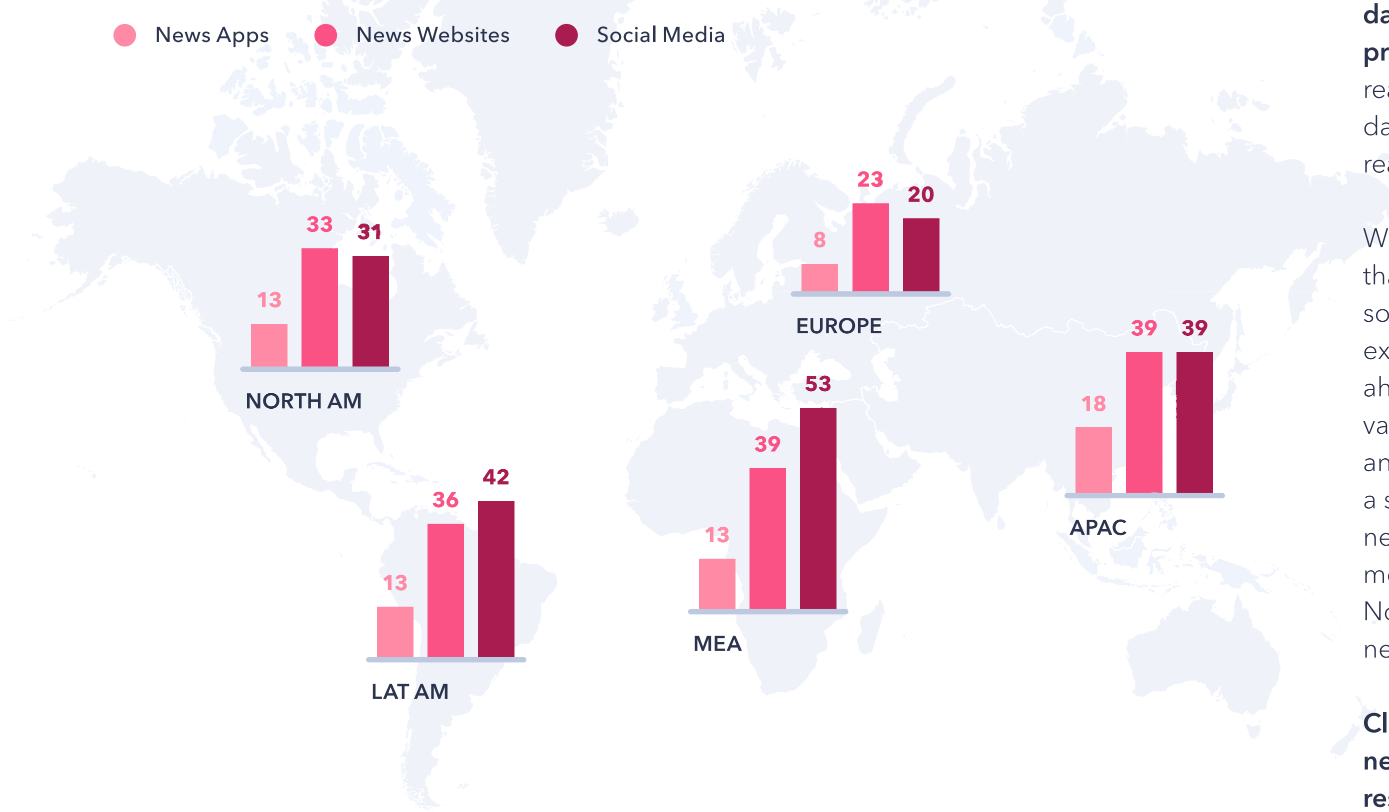
Question: In the past month, which devices have you used to do the following?
Source: GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

Online News Ahead of Print

01:00 AVERAGE TIME SPENT PER DAY **ON ONLINE PRESS**

00:44 AVERAGE TIME SPENT PER DAY **ON PHYSICAL PRINT PRESS**

% who have consumed news* online in the last 30 days via...



**Social Media/News Websites/ Apps data aggregated from Gen Xs who have seen a video, article or story on those channels from at least one of 31 named online news services.*

Gen X's digital footprint in news consumption is another area that is worth noting when building a profile for this audience. **They dedicate more daily time to reading digital press than print press**, with the average Gen X reading an hour of online press each day compared to ¾ of an hour per day reading physical print press.

When we look at the places online that Gen Xs are consuming news on social media and on websites to almost exactly the same degree, with both way ahead of news-specific apps. This does vary regionally; Gen Xs in Latin America and the Middle East and Africa show a stronger preference for consuming news on social media, whereas the more traditional Gen Xs in Europe and North America still (slightly) favour news websites.

Clearly the opportunity to consume news alongside other content resonates with Gen Xs like it does with the younger generations, and the shareability of content on social media through its role as a communal discussion platform is ideal for keeping them in the loop – something we explore later.

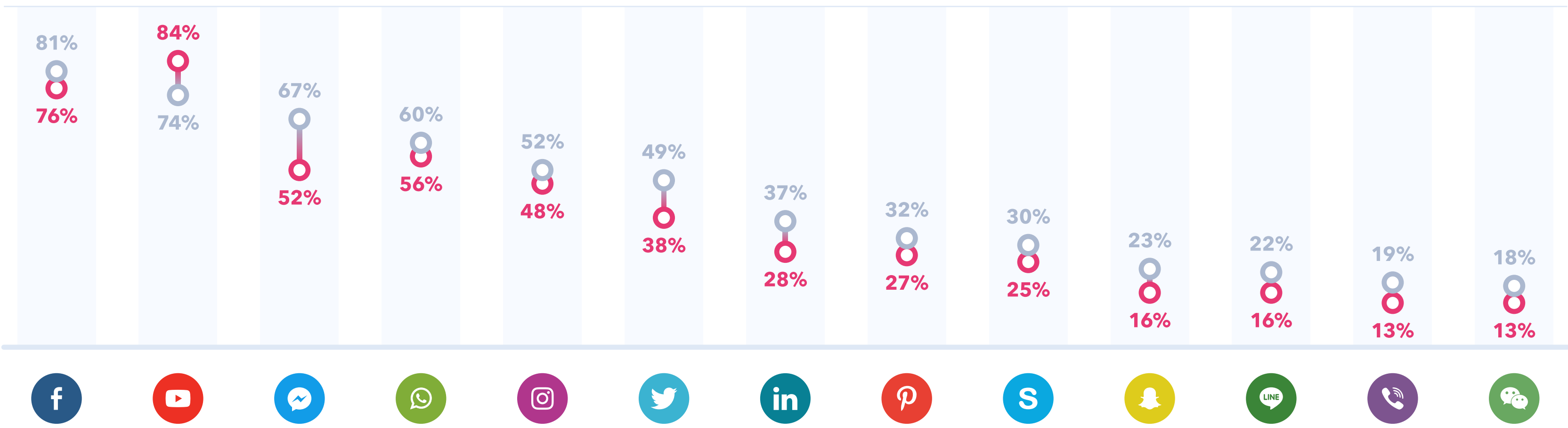
Question: For these services, could you tell us where you have seen one of their videos, articles or stories online during the last 30 days?
Source: GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

Gen X

Social Media

Facebook is still Gen X's Social Hub

% of Gen X who have an account/have visited the following social platforms in the past month (excl. China)



With Gen Xs now spending an average of almost 2 hours a day on social media they shouldn't be hard to find online, and once engaged, they can be a quick win for marketers who position themselves well to target this generation.

In line with wider global trends, YouTube is the platform they're most likely to be visiting, with 84% doing so monthly. Facebook, however, sits 7 percentage points ahead of YouTube for membership. This highlights how Facebook is often the default starting-point for consumers in the social media landscape, but is also likely to be the first platform Gen Xs joined when it launched over a decade ago. When we look at the number of Gen Xs **self-reporting** actively engaging with the platforms, Facebook also comes out on top. For at least daily visits, millennials and Gen Zs now favor YouTube, but for Gen X Facebook is still the go-to platform. Traditional online marketing methods still work effectively with this group, and they are **more likely** to react to social media advertising on Facebook.

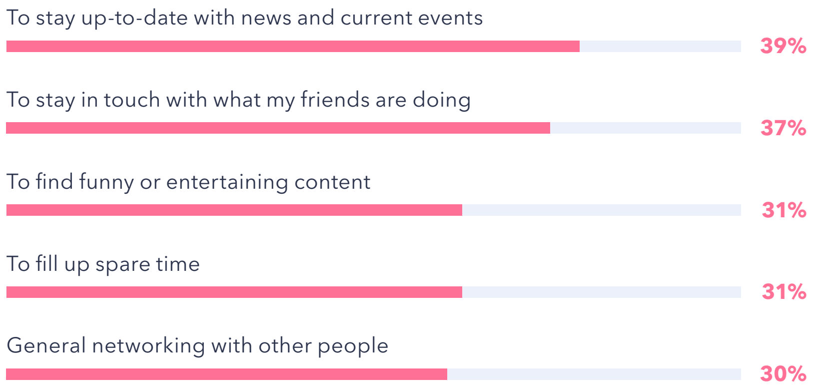
This isn't to say other platforms haven't seen significant growth in membership or visitation rates over the past few years. **Since 2016, Instagram has seen a 32% increase in membership and a 31% increase in monthly visitation, while messaging services Facebook Messenger and WhatsApp have also seen increases in monthly visitation** (17% and 24% increases, respectively). Although Gen X may be generally slower on the uptake of some platforms, they are slowly catching up for specific platforms.

Despite being relatively time poor due to busy lifestyles, Gen Xs are multi-networkers and keep a portfolio of social accounts. The average Gen X has 7 social media accounts, compared to 9 for Gen Z and millennials, and 5 for Baby Boomers. While not all networks are visited with the same frequency, Gen Xs are clearly switching between different platforms throughout the day and for different purposes – a behavior that mobile has facilitated.

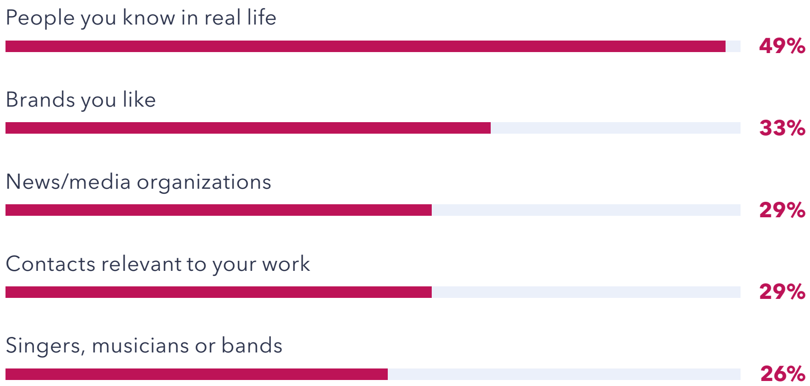
Question: On which of the following services do you have an account? // Which of the following sites/applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet? **Source:** GlobalWebIndex Q1 2019 **Base:** 44,619 Gen X Internet Users aged 37-55 (excl. China)

Social Media Behaviors

% of Gen X who say the following are main reasons for using social media



% of Gen X who follow these types of accounts on social media



While for most younger consumers social media platforms have now evolved into entertainment hubs, this is less evident for Gen X. **Going to social to find funny or entertaining content has seen large increases for Gen Z and millennials, but for Gen X has consistently remained around the 30% mark**. Although their top reason for going on social media is purposeful – to keep updated on news and current events – **many of their most cited motivations for going on social media are distinctly non-purposeful**. Using social media to keep in touch with friends, fill up spare time and to generally network with others all feature in their top five motivations.

3 in 10 Gen Xs use social media to research products to buy, with a further 33% following brands they like and 24% following brands they are thinking of buying from on social media. **This is a group that does not mind brand interaction on social media, and actively look for products and services in this space**. Gen Xs are most likely to be following contacts relevant to their work (29%) and 44% fall under our Professional Networker social segment* – clearly reflecting this audience's stage of life, and the role social media has come to play in the professional sphere.

*For more information about how the segments in this question are defined, please click here

Question: Who do you follow on social media? **Source:** GlobalWebIndex Q1 2019 **Base:** 42,735 Internet Users aged 37-55 **Link:** http://g-web.in/1yduWMd

Question: What are your main reasons for using social media? **Source:** GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

Gen X

Commerce & Brand Engagement

Brand Discovery

% of Gen X who find out about new brands/products/services via…

TOP OVER-INDEX BY REGION

APAC	Articles on newspaper/magazine websites	16%	1.07
Europe	Product brochures/catalogues	22%	1.31
LatAm	Deals on group-buying websites	19%	1.70
MEA	Ads heard on the radio	19%	1.38
North Am	Ads heard on the radio	19%	1.39

Gen X may be enthusiastic about engaging with new types of media, but traditional marketing channels are still the most impactful. Search engines (39%) and TV ads (38%) are the top two ways they come across new brands, products or services, and these are especially impactful in North America (46%) – a region where linear TV is still very important in daily media schedules – but equally as important in Latin America (46%) and Europe (43%).

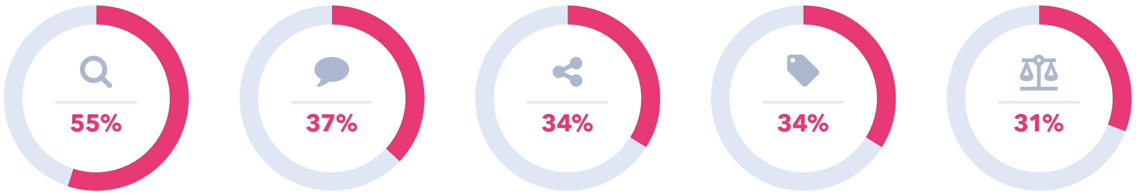
Digital channels, most notably online ads, have more of an impact than might be expected though, particularly in some of the world regions. **In Latin America, for example, Gen X are almost as likely to discover brands via online ads as TV ads, and almost a fifth of Gen Xs find brands through preroll video ads in the region**.

With a third of Gen Xs following their favorite brands on social media, many seem comfortable with seeing branded content on their newsfeeds. They've begun to incorporate social into their purchase journeys too, just as millennials and Gen Z have; many Gen Xs are discovering brands via ads on social media (24%) and recommendations in their social media feeds (22%), and they're not too far behind Gen Zs for this figure. Again, social is especially important for reaching those in Latin America; 4 in 10 Gen Xs in this region say they discover new brands and products via ads seen on social media.

Question: How do you typically find out about new brands and products?
Source: GlobalWebIndex Q1 2019 **Base:** 49,253 Gen X Internet Users aged 37-55

Product Research

% of Gen X who mainly use the following when actively doing brand/product research



Search engines	Consumer reviews	Social networks	Product/brand sites	Price comparison websites
55%	37%	34%	34%	31%
IDX 1.05	IDX 1.04	IDX 0.82	IDX 1.06	IDX 1.15

TOP OVER-INDEX BY REGION

APAC	Messaging/live chat services	17%	1.22
Europe	Price comparison websites	38%	1.42
LatAm	Product/brand sites	47%	1.47
MEA	Social networks	56%	1.35
North Am	Consumer reviews	43%	1.20

Search engines are the go-to for Gen Xs wanting to further research a brand online (at 55%). Beyond this, consumer reviews are an important reference point for this generation's online research, influencing over a third. While social media is used to a lesser degree compared to the average internet user, it is particularly impactful for Gen Xs in Latin America (54%) and the Middle East and Africa (56%).

Gen Xs like to do research before making purchases. **55% say they like to seek an expert opinion before buying products, and as a generation they're more likely than younger generations to want their favorite brands to keep them up-to-date with the latest news and products**. This points to the importance of offering a clear explanation of new products and their benefits to Gen Xs across their preferred points of contact.

Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? **Source:** GlobalWebIndex Q1 2019 **Base:** 49,253 Gen X Internet Users aged 37-55

Rewards Lead to Purchase & Loyalty

% of Gen X who would be motivated to make a purchase online by the following

	%	IDX
Free delivery	58%	1.04
Coupons and discounts	43%	1.01
Reviews from other customers	35%	0.97
Easy returns policy	34%	1.03
Quick/easy online checkout process	30%	1.00

With a quarter of Gen X in the top 25% income bracket, Gen X's spending power is considerable. However, they are also a generation that has been stung by economic recession and uncertainty, which may explain why a more frugal mindset is embodied in their top purchase drivers.

After free delivery, nearly half of Gen Xs are motivated by coupons or discounts to make a purchase. **Out of all generations, they're also the most likely to value the possibility of receiving loyalty points when purchasing (30%), with many being happy to advocate brands in return**. And if brands get it right, Gen Xs are the generation most likely to be loyal, with **3 in 5 agreeing that once they find a brand they like, they'll stick with it**.

An important regional difference to note is that **Gen Xs in the Middle East and Africa are 2.5x the average internet user to cite the ability to pay with cash on delivery as a key purchase driver**. The Middle East tends to have the lowest proportion of bank account holders, and historically much of the region has no common address system. These factors mean both home delivery and e-commerce are complicated processes, which explains why Gen X here have such a preference for a physical cash transaction.

"Whether you're in the Middle East, Pakistan, Nigeria, Egypt or elsewhere, there are so many countries in emerging markets that don't have address systems...About 30-35% of packages don't get delivered because the driver cannot find the customer."

Idriss Al Rifai, CEO of Fetchr

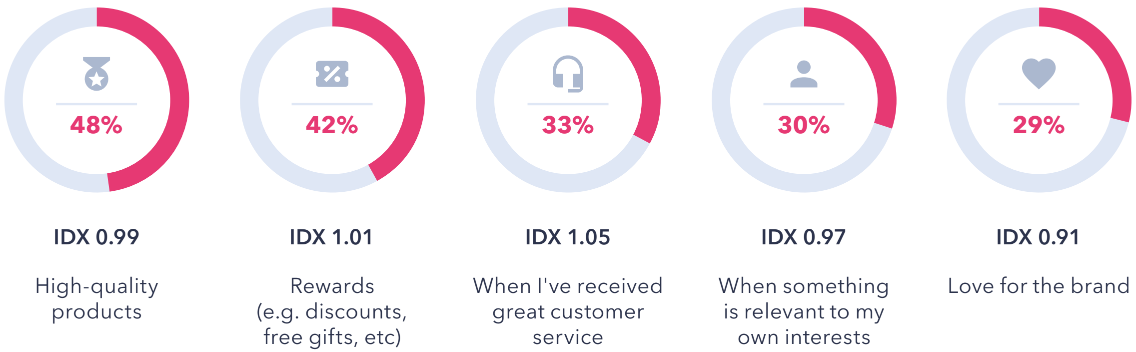
TOP OVER-INDEX BY REGION

APAC	Ability to pay with cash on delivery	21%	1.11
Europe	Free delivery	69%	1.25
LatAm	Quick/easy online checkout process	44%	1.47
MEA	Ability to pay with cash on delivery	48%	2.47
North Am	Loyalty points	37%	1.32

Question: When shopping online, which of these features would most increase your likelihood of buying a product? **Source:** GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

Rewards Lead to Purchase & Loyalty

% of Gen X who would be motivated to promote a favorite brand online by the following



TOP OVER-INDEX BY REGION

APAC	When something enhances my online reputation/status	15%	1.16
Europe	Rewards (e.g. discounts, free gifts, etc)	51%	1.23
LatAm	Having insider knowledge about the brand or its products	27%	1.47
MEA	When I've received great customer service	49%	1.55
North Am	Rewards (e.g. discounts, free gifts, etc)	48%	1.16

That's not to say that rewards completely outweigh quality though. High-quality products are the biggest driver of brand advocacy, followed closely by rewards. **The key point is that they're prepared to spend money, but they want value for money – whether that's reflected in the quality of the product/service, the customer service received, or through other rewarding returns**.

As with any generation, the deal-breaker is **to understand the needs of Gen Xs without generalization, tailoring brand message and strategy accordingly**. After all, with spending power in mind, Gen X's return and interaction is potentially more rewarding than any other.

Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q1 2019 **Base:** 42,735 Gen X Internet Users aged 37-55

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 46 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 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 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 Q1 2019 waves of research across 45 countries, with a global sample of 49,253 Gen X internet users aged 37-55.

Argentina	469
Australia	1,555
Austria	538
Belgium	484
Brazil	638
Canada	1,014
China	4,634
Colombia	394
Denmark	524
Egypt	343
France	2,168
Germany	2,233
Ghana	137
Hong Kong	724
India	1,381
Indonesia	282
Ireland	511
Italy	2,362
Japan	877
Kenya	122
Malaysia	381
Mexico	684
Morocco	178

Netherlands	553
New Zealand	473
Nigeria	156
Philippines	276
Poland	606
Portugal	522
Romania	533
Russia	919
Saudi Arabia	351
Singapore	960
South Africa	422
South Korea	563
Spain	2,403
Sweden	510
Switzerland	565
Taiwan	644
Thailand	420
Turkey	350
UAE	562
UK	4,224
USA	10,330
Vietnam	278

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 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

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

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Internet Penetration Rates

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data

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

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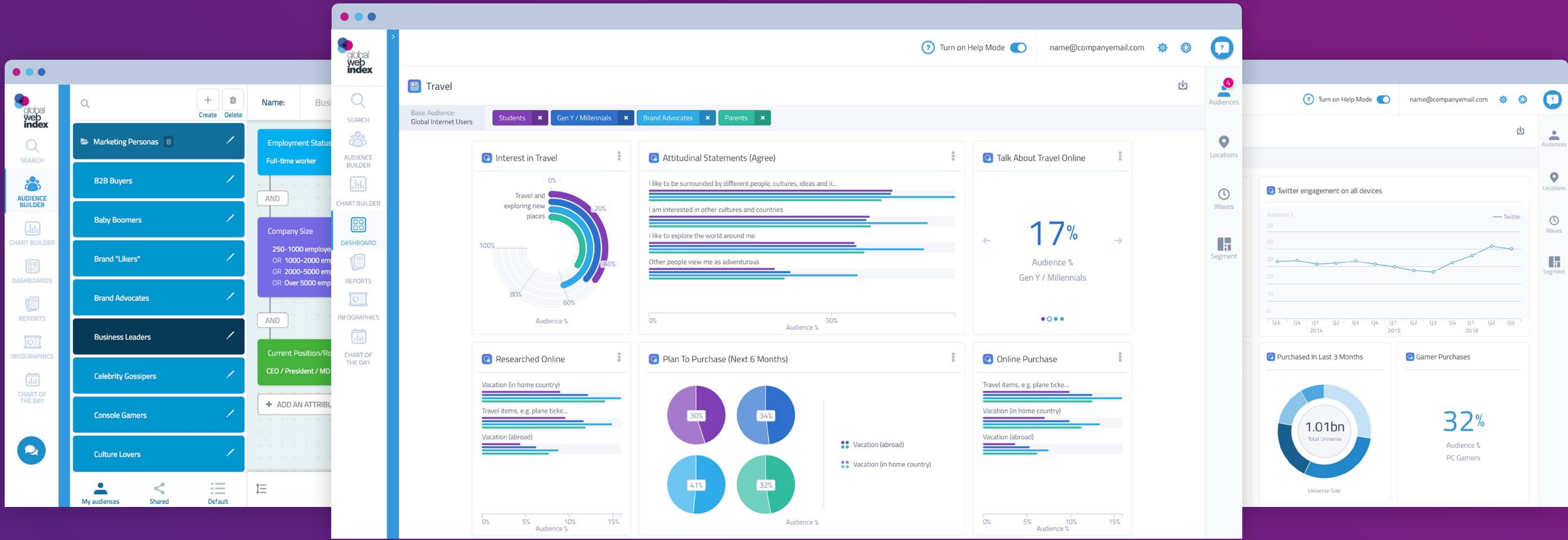

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