DIGITAL IN 2018

ESSENTIAL INSIGHTS INTO INTERNET, SOCIAL MEDIA, MOBILE, AND ECOMMERCE USE ACROSS THE REGION

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Giancarlo Buzzanca

COUNTRIES INCLUDED IN EACH EUROPE REPORT

WESTERN EUROPE	NORTHERN EUROPE PART 1: WEST	NORTHERN EUROPE PART 1: EAST	SOUTHERN EUROPE PART 1: WEST	SOUTHERN EUROPE PART 1: EAST	EASTERN EUROPE PART 1: WEST	EASTERN EUROPE PART 1: EAST
AUSTRIA	GUERNSEY	DENMARK	ANDORRA	ALBANIA	CZECH REPUBLIC	BELARUS
BELGIUM	IRELAND	ESTONIA	GIBRALTAR	BOSNIA & HERZEGOVINA	HUNGARY	BULGARIA
FRANCE	ISLE OF MAN	FINLAND	**ITALY**	CROATIA	POLAND	MOLDOVA
GERMANY	JERSEY	LATVIA	MALTA	GREECE	SLOVAKIA	ROMANIA
LIECHTENSTEIN	UNITED KINGDOM	LITHUANIA	PORTUGAL	KOSOVO		RUSSIA
LUXEMBOURG	FAROE ISLANDS	NORWAY	SAN MARINO	TFYR MACEDONIA		UKRAINE
MONACO	ICELAND	SWEDEN	SPAIN	MONTENEGRO		
NETHERLANDS				SERBIA		
SWITZERLAND				SLOVENIA		

PANORAMICA GLOBALE

GEN 2018

IL DIGITAL NEL MONDO NEL 2018

INDICATORI STATISTICI PRINCIPALI PER GLI UTENTI INTERNET, MOBILE E SOCIAL MEDIA A LIVELLO MONDIALE

POPOLAZIONE TOTALE	UTENTI INTERNET	UTENTI ATTIVI SU SOCIAL MEDIA	UTENTI MOBILE	UTENTI ATTIVI SU SOCIAL MEDIA DA MOBILE
7,593 MILIARDI	4,021 MILIARDI	3,196 MILIARDI	5,135 MILIARDI	2,958 MILIARDI
URBANIZZAZIONE: 55%	PENETRAZIONE: 53%	PENETRAZIONE: 42%	PENETRAZIONE: 68%	PENETRAZIONE: 39%

FONTI: POPOLAZIONE: NAZIONI UNITE; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; FACEBOOK; NATIONAL REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA E SOCIAL MEDIA SU MOBILE: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; TECHRASA; SIMILARWEB; DING; ANALISI KEPIOS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON. NOTA: I DATI SULLA PENETRAZIONE SONO RELATIVI A TUTTA LA POPOLAZIONE, SENZA TENERE CONTO DELL'ETÀ.

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CRESCITA DIGITALE ANNUALE

CAMBIAMENTO DEGLI INDICATORI STATISTICI PRIMARI DI ANNO IN ANNO

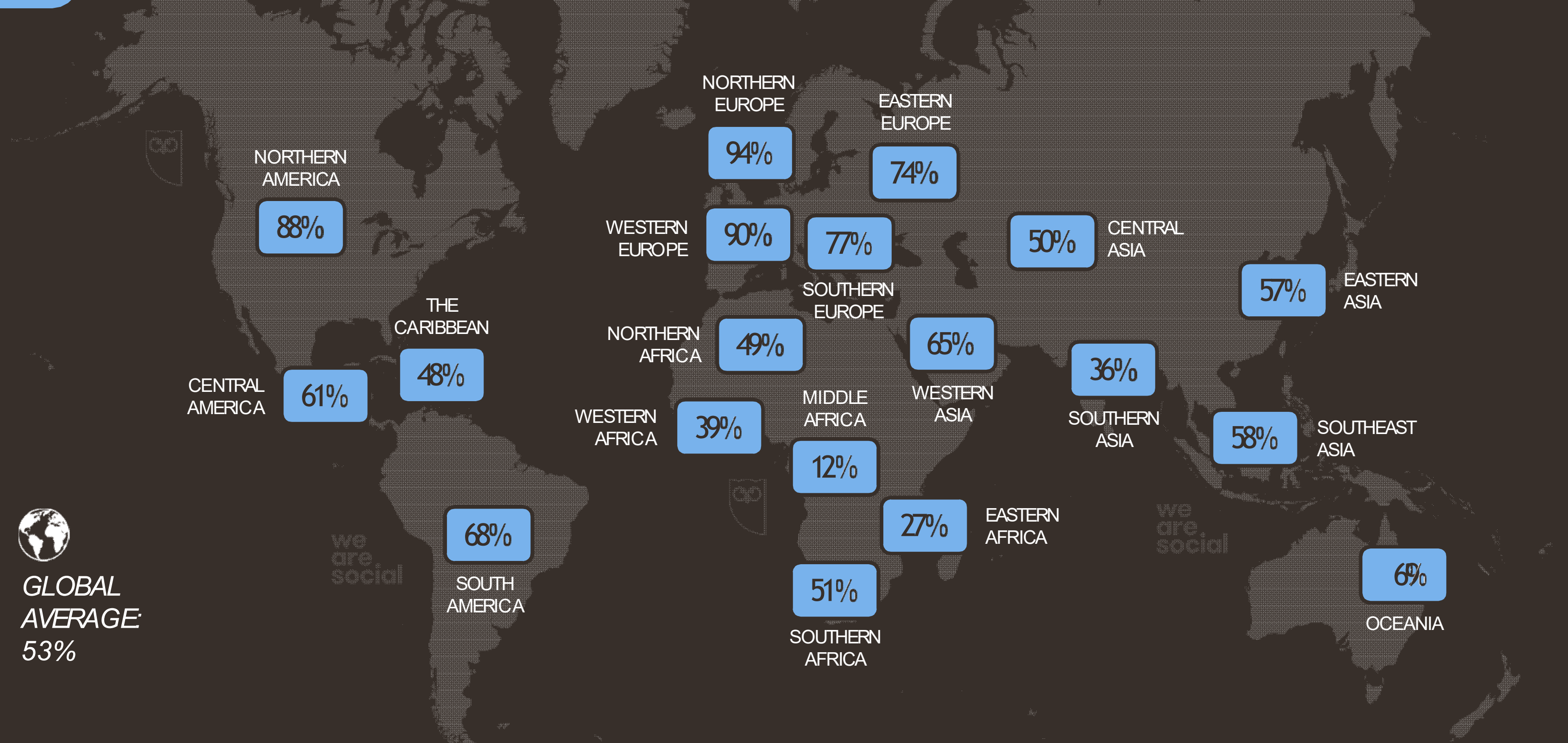
UTENTI INTERNET	UTENTI ATTIVI SU SOCIAL MEDIA	UTENTI MOBILE	UTENTI ATTIVI SU SOCIAL MEDIA DA MOBILE
+7%	+13%	+4%	+14%
DA GEN 2017	DA GEN 2017	DA GEN 2017	DA GEN 2017
+248 MILIONI	+362 MILIONI	+218 MILIONI	+360 MILIONI

FONTI: POPOLAZIONE: NAZIONI UNITE; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; FACEBOOK; NATIONAL REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA E SOCIAL MEDIA SU MOBILE: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; TECHRASA; SIMILARWEB; DING; ANALISI KEPIOS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON. NOTA: I DATI SULLA PENETRAZIONE SONO RELATIVI A TUTTA LA POPOLAZIONE, SENZA TENERE CONTO DELL'ETÀ.

JAN 2018

INTERNET PENETRATION BY REGION

REGIONAL PENETRATION FIGURES, COMPARING INTERNET USERS TO TOTAL POPULATION



SOURCES: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

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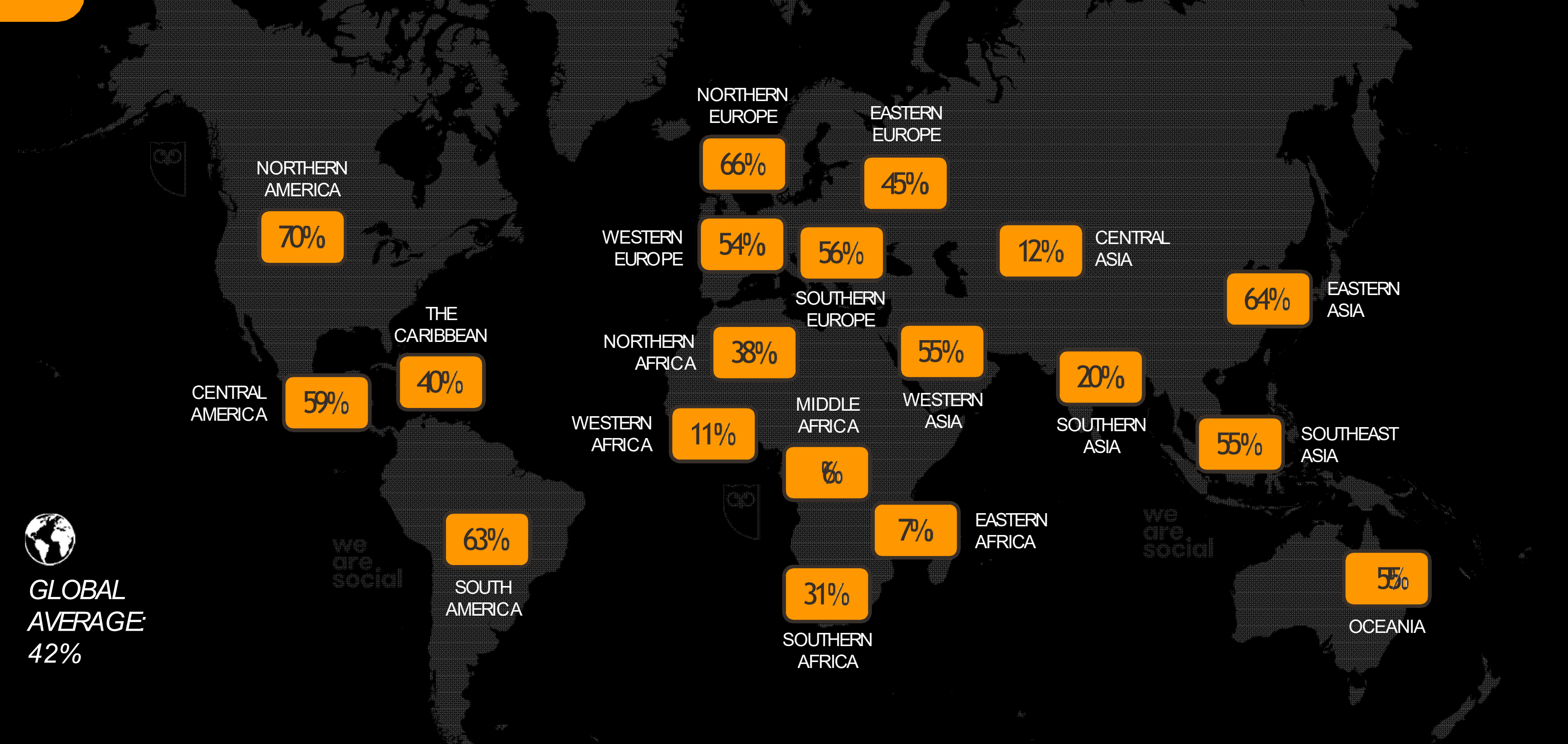
SOCIAL MEDIA PENETRATION BY REGION

TOTAL ACTIVE ACCOUNTS ON THE MOST ACTIVE SOCIAL NETWORK IN EACH COUNTRY, COMPARED TO POPULATION



GLOBAL AVERAGE: 42%

SOURCES: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS.
NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

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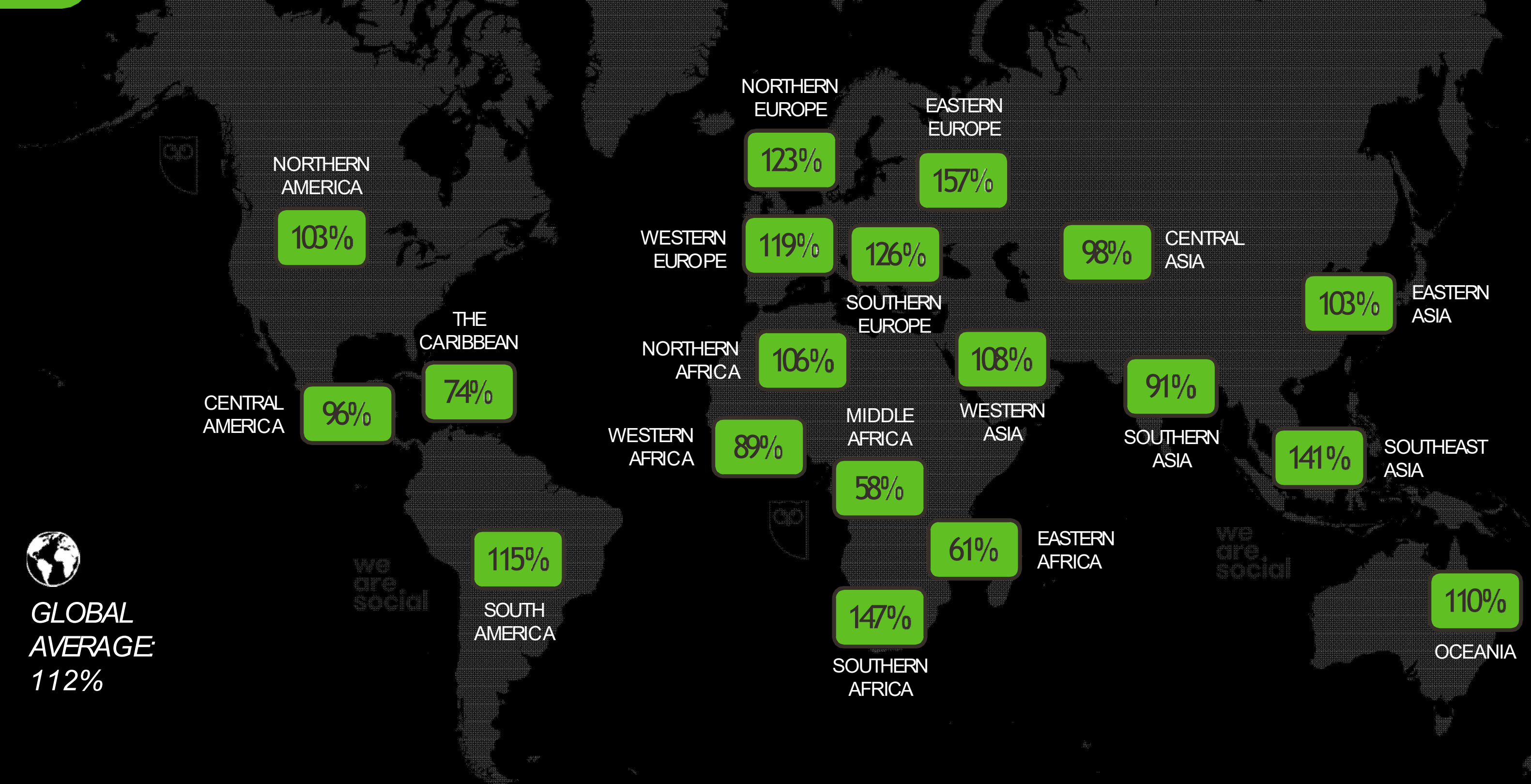
MOBILE CONNECTIVITY BY REGION

THE NUMBER OF MOBILE CONNECTIONS COMPARED TO POPULATION (NOTE: NOT UNIQUE USERS)

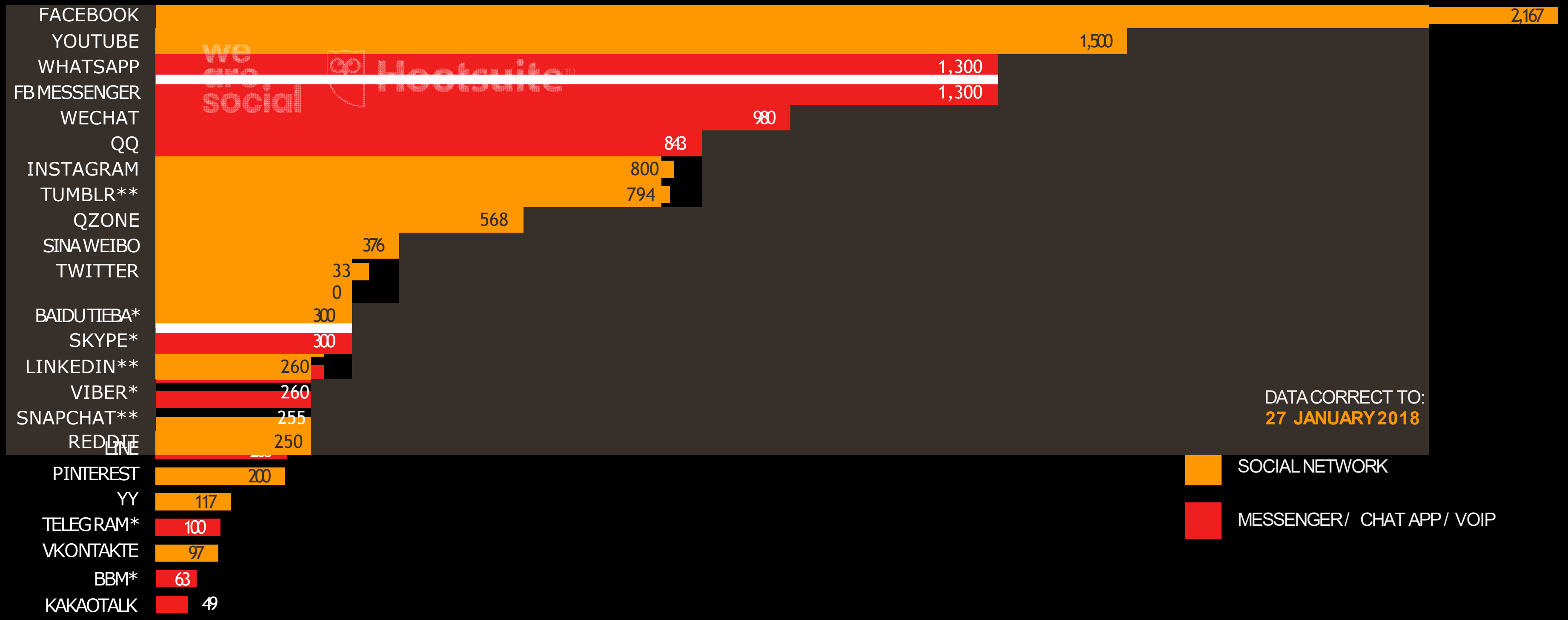


SOURCES: GSMA INTELLIGENCE, Q4 2017. NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

ACTIVE USERS OF KEY GLOBAL SOCIAL PLATFORMS

BASED ON THE MOST RECENTLY PUBLISHED MONTHLY ACTIVE USER ACCOUNTS FOR EACH PLATFORM, IN MILLIONS

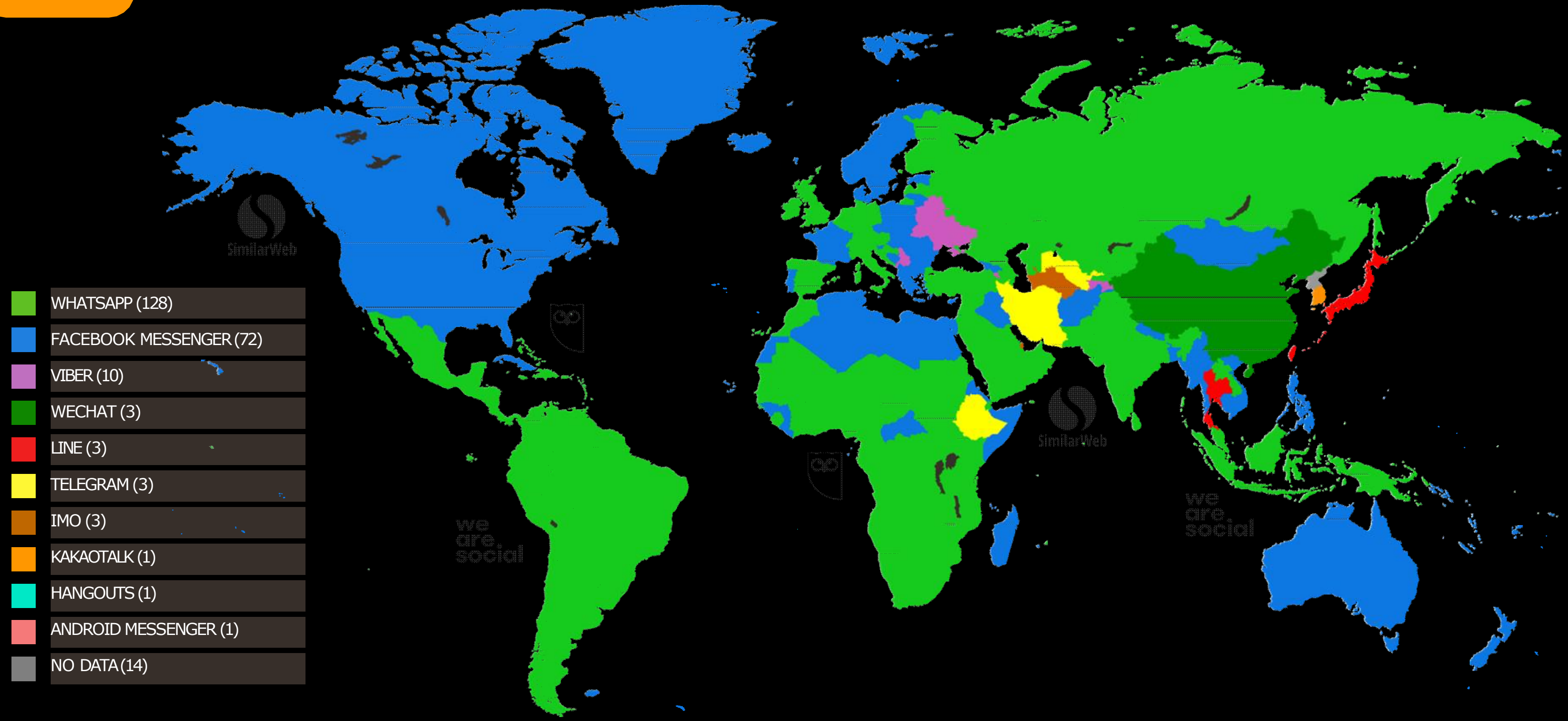


SOURCES: KEPIOS ANALYSIS; LATEST COMPANY EARNINGS RELEASES, PRESS RELEASES OR MEDIA STATEMENTS; REPORTS IN REPUTABLE MEDIA; ALL AS OF JANUARY 2018. ***ADVISORY:** PLATFORMS IDENTIFIED BY (*) HAVE NOT PUBLISHED UPDATED USER FIGURES IN THE PAST 12 MONTHS, SO FIGURES MAY BE LESS RELIABLE. ****NOTES:** THESE PLATFORMS DO NOT PUBLISH MAU DATA. TUMBLR FIGURE IS FOR MONTHLY UNIQUE VISITORS IN DEC 2017, VIA SIMILARWEB. SNAPCHAT FIGURE VIA TECHCRUNCH, JUN 2017. LINKEDIN DATA VIA FORTUNE / APPTOPIA, APR 2017.

JAN 2018

TOP MESSENGER APPS BY COUNTRY

BASED ON THE GOOGLE PLAY STORE RANK FOR EACH COUNTRY IN DECEMBER 2017



SOURCE: SIMILARWEB, JANUARY 2018, BASED ON THE GOOGLE PLAY APP STORE RANK FOR DECEMBER 2017. FIGURES IN PARENTHESES IN THE LEGEND REPRESENT THE NUMBER OF COUNTRIES / TERRITORIES IN WHICH EACH PLATFORM IS THE TOP-RANKED MESSENGER APP.

WE ARE SOCIAL'S ANALYSIS: DIGITAL IN 2018

With more than 4 billion people using the internet for an average of 6 hours each per day, digital has become an essential part of everyday life for most of us. We're using that connectivity in almost every aspect of our lives, whether it's chatting with friends, playing games, researching products, tracking our health, or even finding love. As a result, brands need to evolve beyond today's siloed approach to digital, and build seamless digital integration into everything they do – just as our audiences already have. Here are some tips to help with that:

Start with what people really need and want, and not just what the technology can do

Focus on creating mutual value at every opportunity, instead of simply 'selling more stuff'

Make it easy for people to buy online as soon as they're ready, wherever they are

Harness digital tools to keep the conversation going, even after you make a successful sale

To learn more about what these Digital, Social and Mobile trends mean for your brand, click here to download our Think Forward report.

HOOTSUITE'S PERSPECTIVE: 2018 SOCIAL TRENDS

The evolution of social ROI. It's the end of the road for vanity metrics. Expect to see more organisations evolve their metrics as they look to quantify social's contribution to tangible business challenges such as lowering costs, increasing revenue, mitigating risk, and attracting talent.

Mobile fuels the growth of social TV. In 2018, social networks will encourage brands to become broadcasters as mobile video and social-TV content take the spotlight. We advise caution here as the metrics that bump the stock price of social networks—such as mobile video views—might not help your organisation achieve your own business outcomes.

Trust declines, while peer influence rises. From Trump's tumultuous triumph over traditional media to the fake news phenomenon, we saw a shift in media culture in 2017. It's clear we're moving away from trusting traditional institutions—and moving towards smaller spheres of influence where customer communities and engaged employees matter more than ever.

Humans, meet AI. The machines have risen. And marketers have discovered they can be delightfully useful. But while marketers rush ahead with chatbots and AI-generated content, it's still unclear whether customers will value these human-less engagements.

The promise (and reality) of social data. From tying together analytics systems to CRM integrations, marketers underestimated the complexity of social data initiatives. Organisations must recalculate the effort and resources needed to turn social data into a true—and unified—source of customer insights.

Click here to download our 2018 Social Media Trends Toolkit to align your strategy with the year's key social network and digital trends.

CLICCA QUI PER ACCEDERE AI PRINCIPALI DATI NUMERICI RELATIVI AI SINGOLI PAESI DEL NOSTRO 'DIGITAL IN 2018'

ITALIA

DIGITAL IN 2018 IN ITALIA

UNO SNAPSHOT DEGLI INDICATORI STATISTICI PRIMARI RELATIVI ALL'ITALIA

POPOLAZIONE TOTALE	UTENTI INTERNET	UTENTI ATTIVI SU SOCIAL MEDIA	UTENTI MOBILE	UTENTI ATTIVI SU SOCIAL MEDIA DA MOBILE
59,33 MILIONI	43,31 MILIONI	34,00 MILIONI	49,19 MILIONI	30,00 MILIONI
URBANIZZAZIONE: 69%	PENETRAZIONE: 73%	PENETRAZIONE: 57%	PENETRAZIONE: 83%	PENETRAZIONE: 51%

FONTI: POPOLAZIONE: NAZIONI UNITE; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; FACEBOOK; NATIONAL REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA E SOCIAL MEDIA SU MOBILE: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; TECHRASA; SIMILARWEB; DING; ANALISI KEPIOS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON. NOTA: I DATI SULLA PENETRAZIONE SONO RELATIVI A TUTTA LA POPOLAZIONE, SENZA TENERE CONTO DELL'ETÀ.

CRESCITA DIGITALE ANNUALE

CAMBIAMENTO DEGLI INDICATORI STATISTICI PRIMARI DI ANNO IN ANNO

UTENTI INTERNET	UTENTI ATTIVI SU SOCIAL MEDIA	UTENTI MOBILE	UTENTI ATTIVI SU SOCIAL MEDIA DA MOBILE
+10%	+10%	+0,2%	+7%
DA GEN 2017	DA GEN 2017	DA GEN 2017	DA GEN 2017
+4 MILIONI	+3 MILIONI	+118 000	+2 MILIONI

FONTI: POPOLAZIONE: NAZIONI UNITE; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; FACEBOOK; NATIONAL REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA E SOCIAL MEDIA SU MOBILE: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; TECHRASA; SIMILARWEB; DING; ANALISI KEPIOS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON. NOTA: I DATI SULLA PENETRAZIONE SONO RELATIVI A TUTTA LA POPOLAZIONE, SENZA TENERE CONTO DELL'ETÀ.

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INDICATORI ECONOMICI E DI POPOLAZIONE

DEMOGRAFIA ESSENZIALE E INDICATORI ECONOMICI PRIMARI

POPOLAZIONE TOTALE	POPOLAZIONE FEMMINILE	POPOLAZIONE MASCHILE	CAMBIAMENTO ANNUALE NELLA DIMENSIONE DELLA POPOLAZIONE	ETÀ MEDIA
59,33 MILIONI	51,2%	48,8%	-0,1%	45,8 ANNI

POPOLAZIONE RESIDENTE IN ZONE URBANE	PIL PRO CAPITE	ALFABETIZZAZIONE TOTALE	ALFABETIZZAZIONE FEMMINILE	ALFABETIZZAZIONE MASCHILE
69%	$ 38.345	99%	99%	99%

FONTI: NAZIONI UNITE; US CENSUS BUREAU; UNESCO.

GEN
2018

UTILIZZO DEI DISPOSITIVI

PERCENTUALE DELLA POPOLAZIONE ADULTA* CHE ATTUALMENTE UTILIZZA DIVERSI TIPI DI DISPOSITIVI [BASATO SU SONDAGGI]

CELLULARE (QUALSIASI TIPO)	SMART PHONE	COMPUTER DESKTOP O PORTATILE	TABLET
97%	76%	62%	31%

TELEVISIONE (QUALSIASI TIPO)	DISPOSITIVO PER LO STREAMING DI CONTENUTI SU TV	DISPOSITIVO E-BOOK	DISPOSITIVO WEARABLE
94%	8%	3%	5%

FONTE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. I NUMERI SI BASANO SULLE RISPOSTE AL SONDAGGIO. ***NOTA:** I DATI RAPPRESENTANO SOLAMENTE LE RISPOSTE DEGLI ADULTI; PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI INDAGINE DI GOOGLE VISITARE LE NOTE ALLA FINE DI QUESTO REPORT.

TEMPO SPESO SUI MEDIA

DATI RICAVATI DA INDAGINE: I NUMERI RAPPRESENTANO L'ATTIVITÀ IN BASE AD UN'AUTOVALUTAZIONE DI CHI HA RISPOSTO

TEMPO MEDIO GIORNALIERO SPESO SU INTERNET DA QUALSIASI DISPOSITIVO	TEMPO MEDIO GIORNALIERO SPESO SU SOCIAL MEDIA DA QUALSIASI DISPOSITIVO	TEMPO MEDIO DI VISIONE TELEVISIVA (TRASMISSIONI, STREAMING E VIDEO ON DEMAND)	TEMPO MEDIO GIORNALIERO SPESO ALL'ASCOLTO DI MUSICA STREAMING
6H 08M	1H 53M	3H 01M	0H 45M

FONTE: GLOBALWEBINDEX, Q2 & Q3 2017. BASATO SU SONDAGGI DI UTENTI INTERNET COMPRESI TRA 16 E 64 ANNI D'ETÀ.
NOTA: IL TEMPO SPESO USANDO SOCIAL MEDIA INCLUDE I SOCIAL NETWORK COSÌ COME GLI STRUMENTI DI MESSAGGISTICA ISTANTANEA.

ATTITUDINE VERSO IL DIGITAL

COME LE PERSONE PERCIPISCONO IL RUOLO DELLA TECNOLOGIA E IL LORO PUNTO DI VISTA SULLA PRIVACY

CREDONO CHE LE NUOVE TECNOLOGIE OFFRANO PIÙ OPPORTUNITÀ CHE RISCHI	SE POSSIBILE PREFERISCONO COMPLETARE INCARICHI IN MODO DIGITALE	CREDONO CHE LA PRIVACY E LA PROTEZIONE DEI DATI SENSIBILI SIANO TEMI MOLTO IMPORTANTI	CANCELLANO I COOKIES DAL BROWSER PER PROTEGGERE LA PROPRIA PRIVACY	USANO ADBLOCK PER NON RICEVERE MESSAGGI PUBBLICITARI
53%	54%	91%	47%	35%

FONTI: GOOGLE CONSUMER BAROMETER, JANUARY 2018; GLOBALWEBINDEX, Q2 & Q3, 2017. **NOTA:** I NUMERI RELATIVI A GOOGLE SONO BASATI SU UN SONDAGGIO DI UTENTI INTERNET ADULTI. PER MAGGIORI INFORMAZIONI VISITARE LE NOTE ALLA FINE DI QUESTO REPORT RIGUARDO ALLA METODOLOGIA E ALLA DEFINIZIONE DELLA AUDIENCE. I NUMERI DEL GLOBALWEBINDEX SONO BASATI SU UN SONDAGGIO DI UTENTI INTERNET COMPRESI TRA I 16 E I 64 ANNI D'ETÀ. I NUMERI RAPPRESENTANO SOLAMENTE LE ATTITUDINI E LE ATTIVITÀ DEGLI UTENTI INTERNET.

USO DI INTERNET

BASATO SULLE INFORMAZIONI RIPORTATE DAGLI UTENTI ATTIVI E DALL'USO DI INTERNET DA MOBILE DICHIARATO DAGLI STESSI

NUMERO TOTALE DI UTENTI INTERNET ATTIVI	UTENTI INTERNET COME PERCENTUALE RISPETTO ALLA POPOLAZIONE TOTALE	NUMERO TOTALE DI UTENTI ATTIVI SU INTERNET DA MOBILE	UTENTI INTERNET DA MOBILE COME PERCENTUALE RISPETTO ALLA POPOLAZIONE TOTALE
43,31 MILIONI	73%	38,81 MILIONI	65%

FONTI: INTERNETWORLDSTATS; INTERNATIONAL TELECOMMUNICATION UNION (ITU), EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; FACEBOOK; NATIONAL REGULATORY AUTHORITIES; GLOBALWEBINDEX, Q2 & Q3 2017. **NOTA:** I DATI DEL GLOBALWEBINDEX SONO BASATI SU UN SONDAGGIO DEGLI UTENTI INTERNET COMPRESI TRA 16 E 64 ANNI D'ETÀ, MA I DATI SONO STATI RIMANEGGIATI PER MOSTRARE LA PENETRAZIONE NAZIONALE SENZA TENERE CONTO DELL'ETÀ.

UTENTI INTERNET: DIVERSI PUNTI DI VISTA

RESOCONTO DEL NUMERO TOTALE DEGLI UTENTI INTERNET PROVENIENTE DA DIVERSI PROVIDER DI DATI

INTERNET WORLD STATS	ITU (INTERNATIONAL TELECOMMUNICATION UNION)	INTERNET LIVE STATS	CIA WORLD FACTBOOK
51,84 MILIONI	36,38 MILIONI	39,21 MILIONI	36,37 MILIONI

FONTI: INTERNETWORLDSTATS; INTERNATIONAL TELECOMMUNICATION UNION (ITU); INTERNETLIVESTATS; CIA WORLD FACTBOOK; TUTTI I NUMERI RIPORTATI SONO AGGIORNATI AL GENNAIO DEL 2018

FREQUENZA DI UTILIZZO DI INTERNET

QUANTO SPESSO GLI UTENTI INTERNET ACCEDONO ALLA RETE, DA OGNI DISPOSITIVO, PER MOTIVI PERSONALI

OGNI GIORNO	ALMENO UNA VOLTA A SETTIMANA	ALMENTO UNA VOLTA AL MESE	MENO DI UNA VOLTA AL MESE
1	7	31	?
88%	11%	1%	0%

FONTE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. I NUMERI SONO BASATI SULLE RISPOSTE AD UN SONDAGGIO. **NOTA:** LE INFORMAZIONI RAPPRESENTANO UNICAMENTE LE RISPOSTE DATE DAGLI INTERVISTATI ADULTI. PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI GOOGLE E SULLA RISPETTIVA DEFINIZIONE DELLA AUDIENCE, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT.

INTERNET: VELOCITÀ E DISPOSITIVI

VELOCITÀ MEDIA DI CONNESSIONE E IL DISPOSITIVO CHE LE PERSONE USANO PIÙ SPESSO PER ACCEDERE ALLA RETE

VELOCITÀ MEDIA TRAMITE CONNESSIONI FISSE	VELOCITÀ MEDIA TRAMITE CONNESSIONI MOBILI	ACCEDONO ALLA RETE PIÙ SPESSO DA COMPUTER O TABLET	ACCEDONO UGUALMENTE DA SMARTPHONE O COMPUTER E TABLET	ACCEDONO ALLA RETE PIÙ SPESSO DA SMARTPHONE
31,96 MBPS	**30,69** MBPS	**15%**	**40%**	**40%**

FONTI: OOKLA SPEEDTEST, NOV 2017; GOOGLE CONSUMER BAROMETER, GEN 2018. I NUMERI SI BASANO SULLE RISPOSTE AD UN SONDAGGIO. **NOTA:** I DATI RAPPRESENTANO LE RISPOSTE DEGLI INTERVISTATI ADULTI. PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI GOOGLE E SULLA RISPETTIVA DEFINIZIONE DELLA AUDIENCE, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT. LA SOMMA DELLE PERCENTUALI D'UTILIZZO DEI DISPOSITIVI POTREBBE NON COSTITUIRE IL 100% DELLE RISPOSTE, A CAUSA DEL NUMERO DI "NON SO" O DEI RISULTATI INCOMPLETI.

SHARE DI TRAFFICO WEB PER DISPOSITIVO

BASATA SULLO SHARE DI OGNI DISPOSITIVO RELATIVO ALLA TOTALITÀ DELLE PAGINE WEB VISITATE ATTRAVERSO DIVERSI BROWSER

PORTATILI E COMPUTER FISSI	TELEFONI CELLULARI	DISPOSITIVI TABLET	ALTRI DISPOSITIVI
59%	35%	5%	0,25%
CAMBIAMENTO DI ANNO IN ANNO: -6%	CAMBIAMENTO DI ANNO IN ANNO: +16%	CAMBIAMENTO DI ANNO IN ANNO: -15%	CAMBIAMENTO DI ANNO IN ANNO: +19%

FONTI: STATCOUNTER, GENNAIO 2018, E STATCOUNTER, GENNAIO 2017.

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IL RANKING DEI PRINCIPALI SITI INTERNET

DATI DA SIMILARWEB. IL RANKING È BASATO SULLA MEDIA MENSILE DEL TRAFFICO DI OGNI SITO INTERNET NEL Q4 DEL 2017

#	SITO INTERNET	CATEGORIA	TRAFFICO MENSILE	TEMPO / VISITA	PAGINE / VISITA
01	GOOGLE.IT	RICERCA	531.200.000	14M 18S	10,6
02	FACEBOOK.COM	SOCIAL MEDIA	244.400.000	17M 32S	15,0
03	YOUTUBE.COM	TV E VIDEO	226.300.000	24M 04S	11,5
04	GOOGLE.COM	RIFERIMENTO	220.000.000	12M 11S	14,5
05	AMAZON.IT	E-COMMERCE	83.400.000	10M 30S	14,6
06	WIKIPEDIA.ORG	REFERENCE	67.400.000	5M 06S	3,7
07	REPUBBLICA.IT	NOTIZIE	48.300.000	21M 48S	8,3
08	LIBERO.IT	NOTIZIE	38.700.000	17M 29S	12,0
09	YAHOO.COM	NOTIZIE	37.900.000	5M 54S	5,7
10	EBAY.IT	E-COMMERCE	32.300.000	10M 08S	10,7

FONTE: SIMILARWEB, GENNAIO 2018, BASATO SU UNA MEDIA DEI DATI MENSILI PER IL Q4 DEL 2017. **NOTA:** IL TRAFFICO MENSILE RAPPRESENTA LE VISITE TOTALI PER OGNI SITO, E NON I VISITATORI SINGOLI. I DATI PER ALCUNE NAZIONI RAPPRESENTANO IL TRAFFICO DA COMPUTER FISSI, MENTRE IL RESTANTE DEI DATI RAPPRESENTANO IL TRAFFICO DA ENTRAMBI COMPUTER FISSI E MOBILE. **AVVERTIMENTO:** ALCUNI SITI INTERNET RIPORTATI IN QUESTA SLIDE POTREBBERO PRESENTARE CONTENUTI PER ADULTI, O CONTENUTI CHE NON SONO CONSONI PER IL LUOGO DI LAVORO. PERFAVORE USARE CAUTELA QUANDO SI VISITANO SITI INTERNET SCONOSCIUTI.

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IL RANKING DEI PRINCIPALI SITI INTERNET

DATI DA ALEXA. IL RANKING È BASATO SUL NUMERO DI VISITATORI DI OGNI SITO E SUL NUMERO DI PAGINE VISTE DURANTE OGNI VISITA

#	SITO INTERNET	TEMPO	PAGINE	#	SITO INTERNET	TEMPO	PAGINE
01	GOOGLE.IT	6M 22S	10,76	11	LIVE.COM	4M 03S	3,41
02	YOUTUBE.COM	8M 18S	4,79	12	BLASTINGNEWS.COM	3M 04S	1,72
03	GOOGLE.COM	7M 32S	8,56	13	INSTAGRAM.COM	5M 23S	3,34
04	FACEBOOK.COM	10M 21S	4,00	14	CORRIERE.IT	8M 57S	3,20
05	AMAZON.IT	9M 22S	9,75	15	SUBITO.IT	10M 55S	9,83
06	WIKIPEDIA.ORG	4M 16S	3,31	16	TWITTER.COM	6M 21S	3,21
07	YAHOO.COM	4M 02S	3,61	17	VK.COM	10M 28S	4,74
08	EBAY.IT	9M 12S	7,65	18	LIVEJASMIN.COM	1M 59S	1,44
09	REPUBBLICA.IT	13M 32S	3,23	19	PORNHUB.COM	8M 29S	3,19
10	LIBERO.IT	5M 24S	4,05	20	MYMOVIES.IT	3M 00S	2,75

FONTE: ALEXA, GENNAIO 2018. **NOTA:** ALEXA USA UNA COMBINAZIONE BASATA SULLA MEDIA DEI VISITATORI GIORNALIERI E LE VISUALIZZAZIONI DI PAGINA SU UN PERIODO DI TEMPO DI UN MESE PER CALCOLARE IL PROPRIO RANKING. I RANKING SU QUESTA SLIDE SONO BASATI SUL MESE FINO AL 16 DI GENNAIO 2018. **AVVERTIMENTO:** ALCUNI SITI INTERNET RIPORTATI IN QUESTA SLIDE POTREBBERO PRESENTARE CONTENUTI PER ADULTI, O CONTENUTI CHE NON SONO CONSONI PER IL LUOGO DI LAVORO. PERFAVORE USARE CAUTELA QUANDO SI VISITANO SITI INTERNET SCONOSCIUTI.

ATTIVITÀ SETTIMANALI PER DISPOSITIVO

PERCENTUALE DELLA POPOLAZIONE TOTALE* IMPEGNATA IN OGNUNA DELLE ATTIVITÀ ALMENO UNA VOLTA A SETTIMANA

	USARE UN MOTORE DI RICERCA	VISITARE UN SOCIAL NETWORK	GIOCARE A GIOCHI ONLINE	GUARDARE VIDEO	CERCARE INFORMAZIONI DI PRODOTTO
SMARTPHONE:	52%	45%	7%	37%	23%
COMPUTER:	45%	30%	6%	31%	21%

FONTE: GOOGLE CONSUMER BAROMETER, GENNAIO 2018. I NUMERI SONO BASATI SULLE RISPOSTE A UN SONDAGGIO. ***NOTA:** I DATI SONO BASATI SULLE RISPOSTE AI SONDAGGI SOLAMENTE DA UTENTI INTERNET; PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI GOOGLE E SULLA RISPETTIVA DEFINIZIONE DELLA AUDIENCE, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT. I DATI SONO STATI RIDEFINITI PER MOSTRARE LA PENETRAZIONE NAZIONALE TOTALE, SENZA TENERE CONTO DELL'ETÀ.

GEN 2018

PRINCIPALI CHIAVI DI RICERCA GOOGLE

CLASSIFICA DELLE PRINCIPALI PAROLE CERCATE SU GOOGLE NEL 2017

#	CHIAVE DI RICERCA	INDICE
01	FACEBOOK	100
02	METEO	63
03	YOUTUBE	42
04	GOOGLE	41
05	ROMA	39
06	TRADUTTORE	30
07	LIBERO	27
08	AMAZON	23
09	DIRETTA	18
10	NEWS	17

#	CHIAVE DI RICERCA	INDICE
11	LIBERO MAIL	16
12	SUBITO	15
13	GMAIL	13
14	YOU	13
15	REPUBBLICA	13
16	SERIE A	13
17	CORRIERE	12
18	GAZZETTA	12
19	MILAN	11
20	INSTAGRAM	11

FONTE: GOOGLE TRENDS, GENNAIO 2018.

FREQUENZA DI FRUIZIONE DI VIDEO ONLINE

QUANTO SPESSO GLI UTENTI INTERNET GUARDANO VIDEO ONLINE (DA QUALSIASI DISPOSITIVO)

GUARDANO VIDEO ONLINE OGNI GIORNO	GUARDANO VIDEO ONLINE OGNI SETTIMANA	GUARDANO VIDEO ONLINE OGNI MESE	GUARDANO VIDEO ONLINE MENO DI UNA VOLTA AL MESE	NON GUARDANO MAI VIDEO ONLINE
1	7	31	365	X
54%	22%	7%	3%	14%

FONTE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. I NUMERI SONO BASATI SULLE RISPOSTE AD UN SONDAGGIO. **NOTA:** LE INFORMAZIONI RAPPRESENTANO UNICAMENTE LE RISPOSTE DATE DAGLI INTERVISTATI ADULTI. PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI GOOGLE E SULLA RISPETTIVA DEFINIZIONE DELLA AUDIENCE, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT.

COME GLI UTENTI INTERNET GUARDANO LA TV

PARAGONE TRA MODALITÀ E DISPOSITIVI USATI PER ACCEDERE ALLA FRUIZIONE DEI CONTENUTI "TELEVISIVI"

TELEVISIONE REGOLARE SU DISPOSITIVO TV	CONTENUTO REGISTRATO SU DISPOSITIVO TV	SERVIZIO ON-DEMAND SU DISPOSITIVO TV	CONTENUTO ONLINE IN STREAMING SU DISPOSITIVO TV	CONTENUTO ONLINE IN STREAMING SU ALTRI DISPOSITIVI
94%	26%	18%	16%	20%

FONTE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. I NUMERI SONO BASATI SULLE RISPOSTE AD UN SONDAGGIO. **NOTA:** LE INFORMAZIONI RAPPRESENTANO UNICAMENTE LE RISPOSTE DATE DAGLI INTERVISTATI ADULTI. PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI GOOGLE E SULLA RISPETTIVA DEFINIZIONE DELLA AUDIENCE, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT.

GEN 2018

USO DEI SOCIAL MEDIA

BASATO SUGLI UTENTI MENSILI ATTIVI RIPORTATI DAL SOCIAL MEDIA PIÙ ATTIVO

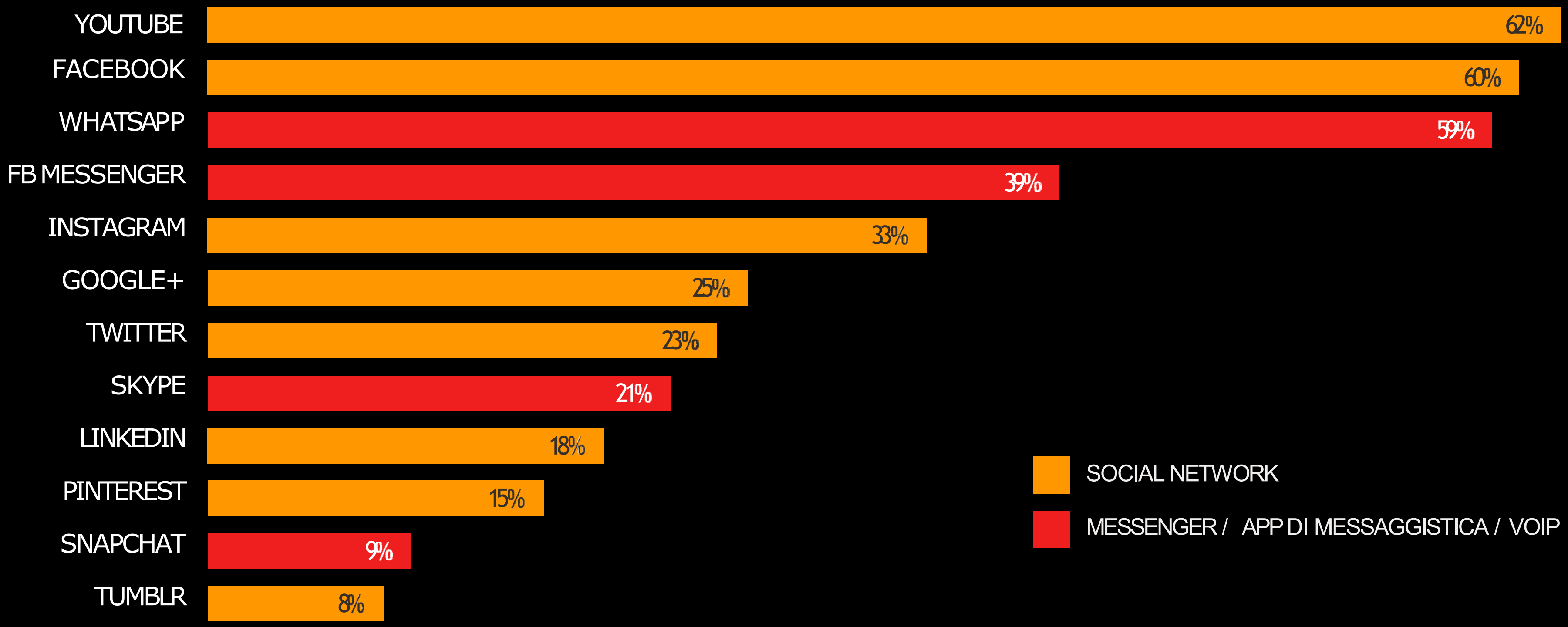
NUMERO TOTALE DI UTENTI ATTIVI SU SOCIAL MEDIA	UTENTI ATTIVI SU SOCIAL MEDIA COME PERCENTUALE SULLA POPOLAZIONE TOTALE	NUMERO TOTALE DI UTENTI SOCIAL CHE ACCEDONO DA MOBILE	UTENTI ATTIVI SOCIAL DA MOBILE COME PERCENTUALE SULLA POPOLAZIONE TOTALE
34,00 MILIONI	57%	30,00 MILIONI	51%

FONTI: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; TECHRASA; SIMILARWEB; DING, ANALISI KEPIOS.
NOTA: I NUMERI SULLA PENETRAZIONE SI RIFERISCONO ALLA POPOLAZIONE TOTALE, SENZA TENERE CONTO DELL'ETÀ.

GEN 2018

PIATTAFORME SOCIAL MAGGIORMENTE ATTIVE

DATI RICAVATI DA INDAGINE: I NUMERI RAPPRESENTANO L'ATTIVITÀ DICHIARATA DAGLI STESSI UTENTI



FONTE: GLOBALWEBINDEX, Q2 & Q3 2017. BASATO SU UN SONDAGGIO SUGLI UTENTI DI INTERNET DI ETÀ COMPRESA TRA I 16 E I 64 ANNI D'ETÀ. **NOTA:** I DATI SONO STATI RIFORMULATI PER MOSTRARE LA PENETRAZIONE NAZIONALE TOTALE SENZA TENERE CONTO DELL'ETÀ. I NUMERI SONO BASATI SULLE RISPOSTE AD UN SONDAGGIO, E POTREBBERO NON RIFERIRSI AI NUMERI DELLA PENETRAZIONE DEI SOCIAL MEDIA COSÌ COME INDICATO ALTROVE IN QUESTO REPORT, PER I DETTAGLI COMPLETI, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT.

ANALISI DELL'UTILIZZO DI FACEBOOK

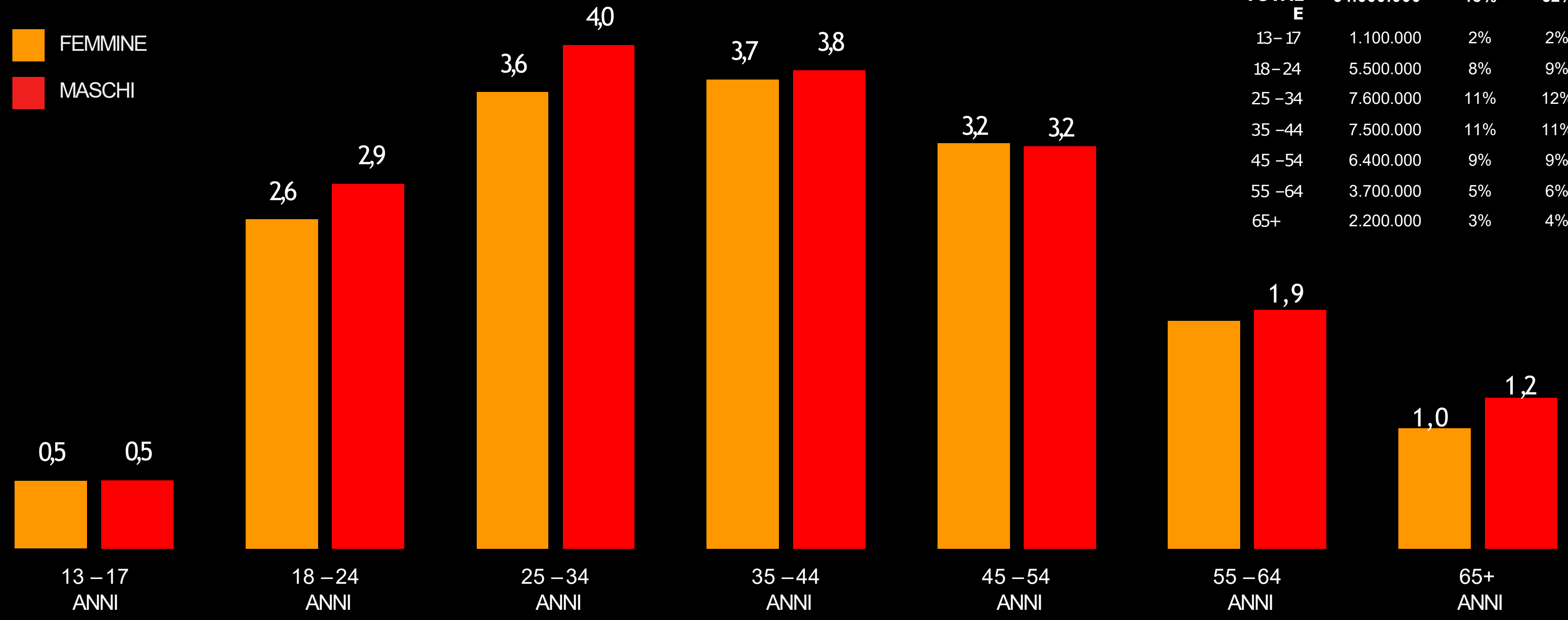
UN'ANALISI DETTAGLIATA DEGLI UTENTI DI FACEBOOK PER DISPOSITIVO E GENERE

NUMERO TOTALE DI UTENTI ATTIVI SU FACEBOOK MENSILMENTE	CAMBIAMENTO ANNUALE NEL NUMERO DI UTENTI FACEBOOK RISPETTO AL GENNAIO 2017	PERCENTUALE DEGLI UTENTI FACEBOOK CHE VI ACCEDONO VIA MOBILE	PERCENTUALE DI PROFILI FACEBOOK DICHIARATI COME FEMMINILE	PERCENTUALE DI PROFILI FACEBOOK DICHIARATI COME MASCHILE
34,00 MILIONI	+10%	88%	48%	52%

FONTE: ESTRAPOLAZIONE DEI DATI FACEBOOK, GENNAIO 2018.

PROFILO DEGLI UTENTI FACEBOOK

ANALISI DETTAGLIATA DEGLI UTENTI FACEBOOK NAZIONALI SECONDO ETÀ E GENERE, NELL'ORDINE DEI MILIONI



ETÀ	TOTALE	FEMMINE	MASCHI
TOTALE	**34.000.000**	**48%**	**52%**
13 – 17	1.100.000	2%	2%
18 – 24	5.500.000	8%	9%
25 – 34	7.600.000	11%	12%
35 – 44	7.500.000	11%	11%
45 – 54	6.400.000	9%	9%
55 – 64	3.700.000	5%	6%
65+	2.200.000	3%	4%

FONTE: ESTRAPOLAZIONE DEI DATI FACEBOOK, GENNAIO 2018. **NOTA:** LA COLONNA "TOTALE" DELLA TABELLA MOSTRA I VALORI ORIGINALI, MENTRE I VALORI DEL GRAFICO SONO STATI DIVISI PER (UN MILIONE). LE PERCENTUALI DELLA TABELLA RAPPRESENTANO LA PARTE RISPETTIVA DEI GRUPPI DIVISI PER GENERE E ETÀ RISPETTO AGLI UTENTI TOTALI DI FACEBOOK A LIVELLO NAZIONALE. I VALORI DELLA TABELLA POTREBBERO NON ESSERE LA SOMMA ESATTA, QUESTO DOVUTO ALL'ARROTONDAMENTO DEI DATI DELLE FONTI.

BENCHMARK DI FACEBOOK

REACH MEDIA DEI POST IN PAGINA, PARAGONATI AI LIKE TOTALI DELLA PAGINA, E IL RUOLO DEL PAID MEDIA

CAMBIAMENTO MENSILE DEI LIKE TOTALI DELLA PAGINA (FAN)

+0,25%

REACH MEDIA DEI POST IN PAGINA DI FACEBOOK VS. I LIKE TOTALI DELLA PAGINA

10,9%

REACH ORGANICA MEDIA DEI POST IN PAGINA DI FACEBOOK VS. I LIKE TOTALI DELLA PAGINA

11,1%

PERCENTUALE DELLE PAGINE FACEBOOK CHE USANO PAID MEDIA PER INCREMENTARE LA REACH DEI SINGOLI POST

48,4%

REACH PAGATA COME PERCENTUALE DELLA REACH TOTALE DI UNA PAGINA FACEBOOK

31,4%

FONTE: LOCOWISE, GENNAIO 2018.

TASSI DI ENGAGEMENT DI FACEBOOK

IL N° DELLE PERSONE CHE INTERAGISCONO CON UN POST, CONTRO IL N° DELLE PERSONE CHE I SUDDETTI POST RAGGIUNGONO

TASSO DI ENGAGEMENT MEDIO PER I POST FACEBOOK IN PAGINA (TUTTI I TIPI)

3,93%

TASSO DI ENGAGEMENT MEDIO PER I POST FACEBOOK DI VIDEO IN PAGINA

7,69%

TASSO DI ENGAGEMENT MEDIO PER I POST FACEBOOK DI FOTO IN PAGINA

4,63%

TASSO DI ENGAGEMENT MEDIO PER I POST FACEBOOK CON LINK IN PAGINA

4,43%

TASSO DI ENGAGEMENT MEDIO PER I POST FACEBOOK DI STATO IN PAGINA

3,32%

FONTE: LOCOWISE, GENNAIO 2018.

ANALISI DELL'UTILIZZO DI INSTAGRAM

UNA PANORAMICA DEGLI UTENTI ATTIVI MENSILMENTE SU INSTAGRAM, DIVISI PER GENERE

NUMERO TOTALE DI UTENTI ATTIVI MENSILMENTE SU INSTAGRAM	UTENTI ATTIVI SU INSTAGRAM COME PERCENTUALE SULLA POPOLAZIONE TOTALE	UTENTI DONNE COME PERCENTUALE DI TUTTI GLI UTENTI ATTIVI SU INSTAGRAM	UTENTI UOMINI COME PERCENTUALE DI TUTTI GLI UTENTI ATTIVI SU INSTAGRAM
16,00 MILIONI	27%	51%	49%

FONTE: DATI ESTRAPOLATI DA FACEBOOK INC., GENNAIO 2018.

UTENTI MOBILE vs. CONNESSIONI MOBILE

PARAGONE TRA IL NUMERO DI UTENTI ATIVI DA MOBILE E IL NUMERO DI CONTRATTI TELEFONICI O CONNESSIONI TELEFONICHE

NUMERO DI UTENTI MOBILE (QUALSIASI TIPO DI DEVICE)	PENETRAZIONE DEL MOBILE (UTENTI MOBILE VS. POPOLAZIONE TOTALE)	NUMERO DI CONNESSIONI MOBILE (CONTRATTI)	CONNESSIONI MOBILE COME PERCENTUALE RISPETTO ALLA POPOLAZIONE TOTALE	CONNESSIONI MEDIE PER OGNI UTENTE MOBILE
49,19 MILIONI	83%	76,14 MILIONI	128%	1,55

FONTI: UNIQUE MOBILE USERS: GSMA INTELLIGENCE, GENNAIO 2018; GOOGLE CONSUMER BAROMETER, GENNAIO 2018; MOBILE CONNECTIONS: GSMA INTELLIGENCE, Q4 2017. NOTA: I NUMERI SULLA PENETRAZIONE SI RIFERISCONO ALLA POPOLAZIONE TOTALE, SENZA TENERE CONTO DELL'ETÀ.

GEN 2018

CONNESSIONI MOBILE PER TIPOLOGIA

BASATO SUL NUMERO DI CONNESSIONI CELLULARE

NUMERO TOTALE DI CONNESSIONI MOBILE	CONNESSIONI MOBILE COME PERCENTUALE SULLA POPOLAZIONE TOTALE	PERCENTUALE DELLE CONNESSIONI MOBILE CHE RISULTANO PREPAGATE	PERCENTUALE DELLE CONNESSIONI MOBILE CHE RISULTANO IN ABBONAMENTO	PERCENTUALE DELLE CONNESSIONI MOBILE A BANDA LARGA (3G &4G)
76,14 MILIONI	128%	81%	19%	80%

ONTE: GSMA INTELLIGENCE, Q4 2017. **NOTA:** I NUMERI SULLA PENETRAZIONE SI RIFERISCONO ALLA POPOLAZIONE TOTALE, SENZA TENERE CONTO DELL'ETÀ.

INDICE DI CONNETTIVITÀ MOBILE

VALUTAZIONE DELLA GSMA INTELLIGENCE RISPETTO AI FACILITATORI E AGLI ELEMENTI CHIAVE RELATIVI ALLA CONNETTIVITÀ MOBILE

PUNTEGGIO GENERALE NAZIONALE	INFRASTRUTTURA DELLA RETE MOBILE	ACCESSIBILITÀ DEI DISPOSITIVI E SERVIZI	PREPARAZIONE DEL CONSUMATORE	DISPONIBILITÀ DI CONTENUTI E SERVIZI RILEVANTI
76,23	68,92	74,65	80,95	81,09
SU UN PUNTEGGIO MASSIMO DI 100	SU UN PUNTEGGIO MASSIMO DI 100	SU UN PUNTEGGIO MASSIMO DI 100	SU UN PUNTEGGIO MASSIMO DI 100	SU UN PUNTEGGIO MASSIMO DI 100

SOURCE: GSMA INTELLIGENCE, Q4 2017. TO ACCESS THE COMPLETE MOBILE CONNECTIVITY INDEX, VISIT HTTP://WWW.MOBILECONNECTIVITYINDEX.COM/

ATTIVITÀ DA MOBILE

DATI BASATI SU SONDAGGI: I NUMERI RAPPRESENTANO L'ATTIVITÀ DICHIARATA DAGLI STESSI RISPONDENTI

PERCENTUALE DELLA POPOLAZIONE CHE USA LA MESSAGGISTICA DA MOBILE	PERCENTUALE DELLA POPOLAZIONE CHE GUARDA VIDEO DA MOBILE	PERCENTUALE DELLA POPOLAZIONE CHE GIOCA DA MOBILE	PERCENTUALE DELLA POPOLAZIONE CHE EFFETTUA OPERAZIONI BANCARIE DA MOBILE	PERCENTUALE DELLA POPOLAZIONE CHE USA SERVIZI DI NAVIGAZIONE MOBILE SU MAPPE
61%	52%	37%	23%	52%

FONTE: GLOBALWEBINDEX, Q2 & Q3 2017. BASATO SU UN SONDAGGIO DI UTENTI INTERNET DI ETÀ COMPRESA TRA I 16 E 64 ANNI.
NOTA: I DATI SONO STATI RICOMBINATI PER MOSTRARE LA PENETRAZIONE TOTALE NAZIONALE, SENZA TENERE CONTO DELL'ETÀ.

GEN 2018

ATTIVITÀ GESTITE TRAMITE SMARTPHONE

DATI RICAVATI DA INDAGINE: I NUMERI RAPPRESENTANO L'ATTIVITÀ DICHIARATA DAGLI STESSI RISPONDENTI

Attività	%
USARE LA FUNZIONE DI SVEGLIA	38%
GESTIRE AGENDA O APPUNTAMENTI	21%
CONTORLLARE IL METEO	31%
MONITORARE I LIVELLI DI ATTIVITÀ FISICA, SALUTE E DIETA	4%
GIRARE VIDEO O SCATTARE FOTOGRAFIE	45%
CONTROLLARE LE NOTIZIE	26%
LEGGERE E-BOOK O QUOTIDIANI ONLINE	6%
GESTIRE LISTE (A.E. DELLA SPESA, COSE DA FARE)	11%

FONTE: GOOGLE CONSUMER BAROMETER, GENNAIO 2018. I NUMERI SONO BASATI SULLE RISPOSTE A UN SONDAGGIO. **NOTA:** I DATI RAPPRESENTANO SOLAMENTE LE RISPOSTE DEGLI UTENTI INTERNET ADULTI; PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI GOOGLE E SULLA RISPETTIVA DEFINIZIONE DELLA AUDIENCE, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT. I DATI SONO STATI RICOMBINATI PER MOSTRARE LA PENETRAZIONE TOTALE NAZIONALE, SENZA TENERE CONTO DELL'ETÀ.

GEN 2018

CLASSIFICA DELLE APP PRINCIPALI

CLASSIFICHE DELLE PRINCIPALI APP SECONDO GLI UTENTI ATTIVI MENSILMENTE E IL NUMERO DEI DOWNLOAD

CLASSIFICA SECONDO IL NUMERO DI UTENTI ATTIVI MENSILI NEL 2017

#	NOME DELL'APP	SVILUPPATORE / AZIENDA
01	WHATSAPP MESSENGER	FACEBOOK
02	FACEBOOK	FACEBOOK
03	FACEBOOK MESSENGER	FACEBOOK
04	INSTAGRAM	FACEBOOK
05	AMAZON	AMAZON
06	SHAZAM	SHAZAM ENTERTAINMENT
07	WEATHER BY ILMETEO	ILMETEO
08	SPOTIFY	SPOTIFY
09	TRIPADVISOR	TRIPADVISOR
10	TELEGRAM	TELEGRAM

CLASSIFICA SECONDO IL NUMERO DEI DOWNLOAD NEL 2017

#	NOME DELL'APP	SVILUPPATORE / AZIENDA
01	WHATSAPP MESSENGER	FACEBOOK
02	FACEBOOK MESSENGER	FACEBOOK
03	FACEBOOK	FACEBOOK
04	INSTAGRAM	FACEBOOK
05	AMAZON	AMAZON
06	WISH	CONTEXTLOGIC
07	SNAPCHAT	SNAP
08	SPOTIFY	SPOTIFY
09	MY VODAFONE IT	VODAFONE
10	119	TELECOM ITALIA

FONTE: APPANNIE, GENNAIO 2018, BASATO SU DATI INCLUSI NEL APPANNIE 2017 RETROSPECTIVE REPORT. PER DETTAGLI AGGIUNTIVI VISITARE IL LINK HTTPS://WWW.APPANNIE.COM/

GEN 2018

FATTORI DI INCLUSIONE FINANZIARIA

PERCENTUALE DI POPOLAZIONE CON UN'ETA' SUPERIORE AI 15 ANNI CHE POSSIEDE O USA OGNI PRODOTTO O SERVIZIO FINANZIARIO

HA UN CONTO CORRENTE BANCARIO

87%

HA UNA CARTA DI CREDITO

36%

EFFETTUA / RICEVE PAGAMENTI MOBILE VIA GSMA

[N.A]

EFFETTUA ACQUISTI ONLINE E/O PAGA LE BOLLETTE ONLINE

39%

PERCENTUALE DI DONNE CHE HANNO UNA CARTA DI CREDITO

27%

PERCENTUALE DI UOMINI CHE HANNO UNA CARTA DI CREDITO

46%

PERCENTUALE DI DONNE CHE EFFETTUANO PAGAMENTI SU INTERNET

29%

PERCENTUALE DI UOMINI CHE EFFETTUANO PAGAMENTI SU INTERNET

50%

FONTE: WORLD BANK GLOBAL FINANCIAL INCLUSION DATA (2015).
NOTA: I NUMERI RAPPRESENTANO LA PERCENTUALE DELLE PERSONE CON UN'ETÀ MAGGIORE AI 15 ANNI, NON LA POPOLAZIONE TOTALE.

ATTIVITÀ DI E-COMMERCE (ULTIMI 30 GIORNI)

DATI RICAVATI DA INDAGINE: I NUMERI RAPPRESENTANO L'ATTIVITÀ DICHIARATA DAGLI STESSI RISPONDENTI

HANNO CERCATO IN RETE PRODOTTI O SERVIZI DA ACQUISTARE

63%

HANNO VISITATO UN PUNTO VENDITA ONLINE

67%

HANNO ACQUISTATO UN PRODOTTO O UN SERVIZIO ONLINE

53%

HANNO EFFETTUATO UN ACQUISTO ONLINE TRAMITE UN COMPUTER FISSO O PORTATILE

24%

HANNO EFFETTUATO UN ACQUISTO ONLINE TRAMITE UN DISPOSITIVO MOBILE

24%

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASATO SU UN SONDAGGIO DI UTENTI INTERNET DI ETÀ COMPRESA TRA I 16 E 64 ANNI.
NOTA: I DATI SONO STATI RICOMBINATI PER MOSTRARE LA PENETRAZIONE TOTALE NAZIONALE, SENZA TENERE CONTO DELL'ETÀ.

GEN 2018

SPESA E-COMMERCE PER CATEGORIA

IMPORTO TOTALE SPESO IN UN ANNO SU CATEGORIE DI PRODOTTI E-COMMERCE LEGATE AL CONSUMATORE (IN DOLLARI AMERICANI)

Categoria	Spesa
MODA & BELLEZZA	$ 4,27 MILIARDI
ELETTRONICA & TECNOLOGIA	$ 3,13 MILIARDI
CIBO & CURA DELLA PERSONA	$ 1,17 MILIARDI
ARREDAMENTO & ELETTRODOMESTICI	$ 2,43 MILIARDI
GIOCHI, FAI DA TE E PASSATEMPI	$ 2,71 MILIARDI
VIAGGI (SISTEMAZIONE INCLUSA)	$ 3,54 MILIARDI
MUSICA DIGITALE	$ 0,10 MILIARDI
VIDEO GAMES	$ 0,82 MILIARDI

FONTI: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY AND DIGITAL MEDIA INDUSTRY, AGGIORNATE AL GENNAIO 2018.
NOTA: I NUMERI SONO BASATI SULLE STIME DELLA SPESA DEI CONSUMATORI NELLA TOTALITÀ DELL'ANNO 2017, E NON INCLUDONO LE SPESE B2B.

SPESA E-COMMERCE: CRESCITA ANNUALE

CAMBIAMENTO ANNUALE DELL'IMPORTO SPESO IN UN ANNO SU CATEGORIE DI PRODOTTI E-COMMERCE LEGATE AL CONSUMATORE

Categoria	Crescita
MODA & BELLEZZA	+12%
ELETTRONICA & TECNOLOGIA	+10%
CIBO & CURA DELLA PERSONA	+15%
ARREDAMENTO & ELETTRODOMESTICI	+14%
GIOCHI, FAI DA TE E PASSATEMPI	+7%
VIAGGI (SISTEMAZIONE INCLUSA)	+15%
MUSICA DIGITALE	+9%
VIDEO GAMES	+9%

FONTI: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY AND DIGITAL MEDIA INDUSTRY, AGGIORNATE AL GENNAIO 2018.
NOTA: I NUMERI SONO BASATI SULLE STIME DELLA SPESA DEI CONSUMATORI NELLA TOTALITÀ DELL'ANNO 2017, E NON INCLUDONO LE SPESE B2B.

GEN 2018

DETTAGLIO E-COMMERCE: BENI DI CONSUMO

UNA PANORAMICA DEL MERCATO E-COMMERCE RELATIVO AI BENI DI CONSUMO, CON VALUTA ESPRESSA IN DOLLARI AMERICANI

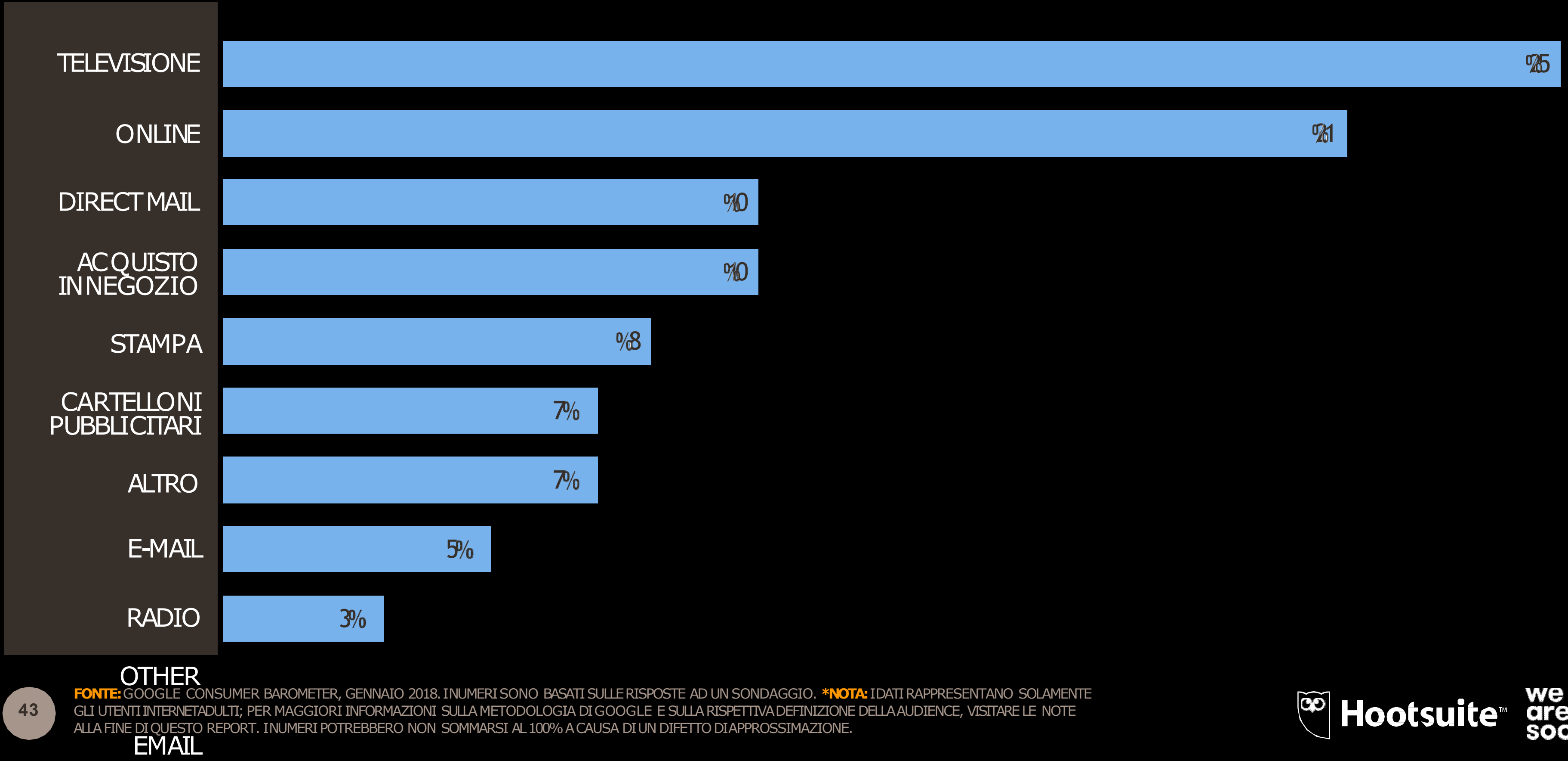
NUMERO TOTALE DI PERSONE CHE ACQUISTANO BENI DI CONSUMO TRAMITE E-COMMERCE	PENETRAZIONE DEI BENI DI CONSUMO SU E-COMMERCE (POPOLAZIONE TOTALE)	VALORE TOTALE DEI BENI DI CONSUMO ACQUISTATI VIA E-COMMERCE	SPESA ANNUALE MEDIO DEGLI UTENTI CHE ACQUISTANO BENI DI CONSUMO SU E-COMMERCE (ARPU)
18,57 MILIONI	31%	$ 13,71 MILIARDI	$ 738
CAMBIAMENTO DI ANNO IN ANNO: +3%		CAMBIAMENTO DI ANNO IN ANNO: +11%	CAMBIAMENTO DI ANNO IN ANNO: +8%

FONTE: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, AGGIORNATO AL GENNAIO 2018. **NOTA:** I NUMERI RAPPRESENTANO LE VENDITE DEI BENI FISICI ATTRAVERSO I CANALI DIGITALI SU OGNI DISPOSITIVO DA PARTE DI UTENTI FINALI PRIVATI, E NON INCLUDONO MEDIA E SERVIZI COME VIAGGI, SOFTWARE, PRODOTTI E SERVIZI B2B, VENDITA DI PRODOTTI USATI O VENDITA TRA PRIVATI (COMMERCIO P2P). I NUMERI DELLLA PENETRAZIONE RAPPRESENTANO LA PERCENTUALE DELLA POPOLAZIONE TOTALE, SENZA TENERE CONTO DELL'ETÀ.

GEN 2018

MEDIA PUBBLICITARIO: PRIMO APPROCCIO

IL CANALE PUBBLICITARIO CHE PER PRIMO HA INTRODOTTO GLI UTENTI INTERNET* A UN PRODOTTO O SERVIZIO CHE HANNO ACQUISTATO



FONTE: GOOGLE CONSUMER BAROMETER, GENNAIO 2018. I NUMERI SONO BASATI SULLE RISPOSTE AD UN SONDAGGIO. *NOTA: I DATI RAPPRESENTANO SOLAMENTE GLI UTENTI INTERNET ADULTI; PER MAGGIORI INFORMAZIONI SULLA METODOLOGIA DI GOOGLE E SULLA RISPETTIVA DEFINIZIONE DELLA AUDIENCE, VISITARE LE NOTE ALLA FINE DI QUESTO REPORT. I NUMERI POTREBBERO NON SOMMARSI AL 100% A CAUSA DI UN DIFETTO DI APPROSSIMAZIONE.

SPAIN

JAN 2018

DIGITAL IN SPAIN

A SNAPSHOT OF THE COUNTRY'S KEY DIGITAL STATISTICAL INDICATORS

TOTAL POPULATION	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
46.38 MILLION	39.42 MILLION	27.00 MILLION	37.27 MILLION	23.00 MILLION
URBANISATION: 80%	PENETRATION: 85%	PENETRATION: 58%	PENETRATION: 80%	PENETRATION: 50%

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION (ALL AGES).

JAN 2018

ANNUAL DIGITAL GROWTH

YEAR-ON-YEAR CHANGE IN KEY STATISTICAL INDICATORS

INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
+4%	+8%	+5%	+5%
SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017
+2 MILLION	+2 MILLION	+2 MILLION	+1 MILLION

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. GROWTH DATA: WE ARE SOCIAL & HOOTSUITE'S *DIGITAL IN 2017* REPORT.

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POPULATION & ECONOMIC INDICATORS

ESSENTIAL DEMOGRAPHICS AND KEY ECONOMIC INDICATORS

TOTAL POPULATION	FEMALE POPULATION	MALE POPULATION	ANNUAL CHANGE IN POPULATION SIZE	MEDIAN AGE
46.38 MILLION	51.0%	49.0%	+0.1%	43.1 YEARS OLD

POPULATION LIVING IN URBAN AREAS	GDP PER CAPITA	LITERACY (TOTAL)	FEMALE LITERACY	MALE LITERACY
80%	$36,462	98%	98%	99%

SOURCES: UNITED NATIONS; US CENSUS BUREAU; UNESCO; WORLD BANK, IMF; CIA WORLD FACTBOOK.

JAN 2018

DEVICE USAGE

PERCENTAGE OF THE ADULT POPULATION* THAT CURRENTLY USES EACH KIND OF DEVICE [SURVEY-BASED]

MOBILE PHONE (ANY TYPE)	SMART PHONE	LAPTOP OR DESKTOP COMPUTER	TABLET COMPUTER
96%	87%	72%	41%

TELEVISION (ANY KIND)	DEVICE FOR STREAMING INTERNET CONTENT TO TV	E-READER DEVICE	WEARABLE TECH DEVICE
95%	10%	10%	7%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTE:** DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

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TIME SPENT WITH MEDIA

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

AVERAGE DAILY TIME SPENT USING THE INTERNET VIA ANY DEVICE	AVERAGE DAILY TIME SPENT USING SOCIAL MEDIA VIA ANY DEVICE	AVERAGE DAILY TV VIEWING TIME (BROADCAST, STREAMING AND VIDEO ON DEMAND)	AVERAGE DAILY TIME SPENT LISTENING TO STREAMING MUSIC
5H 20M	1H 38M	2H 53M	0H 45M

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: TIME SPENT USING SOCIAL MEDIA INCLUDES SOCIAL NETWORKS AS WELL AS MESSENGERS / CHAT APPS.

JAN 2018

ATTITUDES TOWARDS DIGITAL

HOW INTERNET USERS* PERCEIVE THE ROLE OF TECHNOLOGY, AND THEIR PERSPECTIVE ON PRIVACY ISSUES

BELIEVE THAT NEW TECHNOLOGIES OFFER MORE OPPORTUNITIES THAN RISKS	PREFER TO COMPLETE TASKS DIGITALLY WHENEVER POSSIBLE	BELIEVE DATA PRIVACY AND PROTECTION ARE VERY IMPORTANT	DELETE COOKIES FROM INTERNET BROWSER TO PROTECT PRIVACY	USE AN AD-BLOCKING TOOL TO STOP ADVERTS BEING DISPLAYED
57%	57%	91%	48%	42%

SOURCES: GOOGLE CONSUMER BAROMETER, JANUARY 2018; GLOBALWEBINDEX, Q2 & Q3, 2017. **NOTES:** GOOGLE FIGURES BASED ON A SURVEY OF ADULT INTERNET USERS. SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON METHODOLOGY AND AUDIENCE DEFINITIONS. GLOBALWEBINDEX FIGURES BASED ON A SURVEY OF INTERNET USERS AGED 16-64. ***NOTE:** THESE FIGURES ONLY REPRESENT THE ATTITUDES AND ACTIVITIES OF INTERNET USERS.

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INTERNET USE

BASED ON REPORTED INTERNET USER DATA, AND USER-CLAIMED MOBILE INTERNET USE

TOTAL NUMBER OF ACTIVE INTERNET USERS	INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION	TOTAL NUMBER OF ACTIVE MOBILE INTERNET USERS	MOBILE INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION
39.42 MILLION	85%	35.80 MILLION	77%

SOURCES: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; GLOBALWEBINDEX, Q2 & Q3 2017. **NOTES:** GLOBALWEBINDEX DATA IS BASED ON A SURVEY OF INTERNET USERS AGED 16-64, BUT DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE. PENETRATION FIGURES BASED ON POPULATION DATA FROM THE UNITED NATIONS AND THE U.S. CENSUS BUREAU.

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INTERNET USERS: DIFFERENT PERSPECTIVES

REPORTS OF THE TOTAL NUMBER OF INTERNET USERS FROM DIFFERENT DATA PROVIDERS

INTERNET WORLD STATS	ITU (INTERNATIONAL TELECOMMUNICATION UNION)	INTERNET LIVE STATS	CIA WORLD FACTBOOK
40.15 MILLION	37.36 MILLION	37.87 MILLION	37.38 MILLION

SOURCES: INTERNETWORLDSTATS; INTERNATIONAL TELECOMMUNICATION UNION (ITU); INTERNETLIVESTATS; CIA WORLD FACTBOOK; ALL LATEST REPORTED FIGURES AS OF JANUARY 2018.

FREQUENCY OF INTERNET USE

HOW OFTEN INTERNET USERS ACCESS THE INTERNET FOR PERSONAL REASONS (ANY DEVICE)

EVERY DAY	AT LEAST ONCE PER WEEK	AT LEAST ONCE PER MONTH	LESS THAN ONCE PER MONTH
1	7	31	?
92%	6%	2%	0%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTES:** DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. VALUES MAY NOT SUM TO 100% DUE TO "DON'T KNOW" OR INCOMPLETE ANSWERS, OR DUE TO ROUNDING IN THE SOURCE DATA.

JAN 2018

INTERNET CONNECTIONS: SPEED & DEVICES

AVERAGE INTERNET CONNECTION SPEEDS, AND THE DEVICE THAT PEOPLE USE MOST OFTEN TO ACCESS THE INTERNET

AVERAGE INTERNET SPEED VIA FIXED CONNECTIONS	AVERAGE INTERNET SPEED VIA MOBILE CONNECTIONS	ACCESS THE INTERNET MOST OFTEN VIA A COMPUTER OR TABLET	ACCESS EQUALLY VIA A SMARTPHONE AND COMPUTER OR TABLET	ACCESS THE INTERNET MOST OFTEN VIA A SMARTPHONE
65.65 MBPS	31.34 MBPS	14%	39%	45%

SOURCES: OOKLA SPEEDTEST, NOVEMBER 2017; GOOGLE CONSUMER BAROMETER, JANUARY 2018. GOOGLE'S FIGURES BASED ON RESPONSES TO A SURVEY.
NOTES: DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DEVICE USAGE PERCENTAGES MAY NOT SUM TO 100% DUE TO "DON'T KNOW" OR INCOMPLETE ANSWERS.

JAN 2018

SHARE OF WEB TRAFFIC BY DEVICE

BASED ON EACH DEVICE'S SHARE OF ALL WEB PAGES SERVED TO WEB BROWSERS

LAPTOPS & DESKTOPS	MOBILE PHONES	TABLET DEVICES	OTHER DEVICES
49%	45%	6%	0.14%
YEAR-ON-YEAR CHANGE:	YEAR-ON-YEAR CHANGE:	YEAR-ON-YEAR CHANGE:	YEAR-ON-YEAR CHANGE:
-6%	+9%	-12%	+17%

SOURCES: STATCOUNTER, JANUARY 2018, AND STATCOUNTER, JANUARY 2017.

JAN 2018

SIMILARWEB'S RANKING OF TOP WEBSITES

RANKINGS BASED ON AVERAGE MONTHLY TRAFFIC TO EACH WEBSITE IN Q4 2017

#	WEBSITE	CATEGORY	MONTHLY TRAFFIC	TIME PER VISIT	PAGES PER VISIT
01	GOOGLE.ES	SEARCH	1,651,200,000	9M 05S	7.5
02	GOOGLE.COM	SEARCH	570,100,000	7M 17S	9.2
03	FACEBOOK.COM	SOCIAL	448,900,000	10M 23S	9.8
04	YOUTUBE.COM	TV & VIDEO	417,600,000	18M 13S	8.6
05	WIKIPEDIA.ORG	REFERENCE	151,000,000	3M 36S	2.7
06	AMAZON.ES	SHOPPING	147,200,000	7M 41S	11.1
07	TWITTER.COM	SOCIAL	118,400,000	9M 16S	6.3
08	ELPAIS.COM	NEWS & MEDIA	112,800,000	8M 37S	3.5
09	LIVE.COM	EMAIL	103,100,000	6M 26S	8.6
10	ELMUNDO.ES	NEWS & MEDIA	100,600,000	7M 58S	4.4

SOURCE: SIMILARWEB, JANUARY 2018, BASED ON AVERAGE MONTHLY DATA FOR Q4 2017. **NOTES:** MONTHLY TRAFFIC REPRESENTS TOTAL VISITS TO EACH SITE, NOT UNIQUE VISITORS. DATA FOR SOME COUNTRIES REPRESENTS DESKTOP TRAFFIC, WHILST OTHERS REPRESENTS TRAFFIC FROM BOTH DESKTOP AND MOBILE DEVICES. **ADVISORY:** SOME WEBSITES REFERENCED ON THIS SLIDE MAY CONTAIN ADULT CONTENT, OR CONTENT THAT IS UNSUITABLE FOR THE WORKPLACE. PLEASE USE CAUTION WHEN VISITING UNKNOWN WEBSITES.

JAN 2018

ALEXA'S RANKING OF TOP WEBSITES

RANKINGS BASED ON THE NUMBER OF VISITORS TO EACH SITE, AND THE NUMBER OF PAGES VIEWED ON EACH SITE PER VISIT

#	WEBSITE	TIME	PAGES
01	GOOGLE.ES	6M 14S	10.82
02	YOUTUBE.COM	8M 18S	4.79
03	GOOGLE.COM	7M 32S	8.56
04	FACEBOOK.COM	10M 21S	4.00
05	AMAZON.ES	8M 00S	8.89
06	LIVE.COM	4M 03S	3.41
07	TWITTER.COM	6M 21S	3.21
08	WIKIPEDIA.ORG	4M 16S	3.31
09	OKDIARIO.COM	4M 07S	2.14
10	HOLA.COM	3M 34S	3.66

#	WEBSITE	TIME	PAGES
11	ELPAIS.COM	5M 17S	2.67
12	YAHOO.COM	4M 02S	3.61
13	BLOGSPOT.COM.ES	2M 55S	2.34
14	INSTAGRAM.COM	5M 23S	3.34
15	MARCA.COM	6M 07S	3.56
16	ELMUNDO.ES	5M 04S	2.97
17	ROLLOID.NET	3M 14S	1.61
18	WHATSAPP.COM	3M 50S	1.23
19	LINKEDIN.COM	5M 19S	4.19
20	XVIDEOS.COM	14M 04S	10.15

SOURCE: ALEXA, JANUARY 2018. **NOTES:** 'TIME' REPRESENTS TIME SPENT ON SITE PER DAY. 'PAGES' REPRESENTS NUMBER OF PAGE VIEWS PER DAY. ALEXA USES A COMBINATION OF AVERAGE DAILY VISITORS AND PAGE VIEWS OVER A ONE-MONTH PERIOD TO CALCULATE ITS RANKING. RANKINGS ON THIS SLIDE ARE BASED ON THE MONTH TO 16 JANUARY 2018. **ADVISORY:** SOME WEBSITES REFERENCED ON THIS SLIDE MAY CONTAIN ADULT CONTENT, OR CONTENT THAT IS UNSUITABLE FOR THE WORKPLACE. PLEASE USE CAUTION WHEN VISITING UNKNOWN WEBSITES.

WEEKLY ONLINE ACTIVITIES BY DEVICE

PERCENTAGE OF THE TOTAL POPULATION* ENGAGING IN EACH ACTIVITY AT LEAST ONCE PER WEEK [SURVEY-BASED]

	USE A SEARCH ENGINE	VISIT A SOCIAL NETWORK	PLAY GAMES	WATCH VIDEOS	LOOK FOR PRODUCT INFORMATION
SMARTPHONE:	60%	54%	13%	47%	38%
COMPUTER:	53%	34%	10%	39%	32%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTES:** DATA BASED ON SURVEY RESPONSES FROM ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

TOP GOOGLE SEARCH QUERIES IN 2017

RANKING OF THE TOP SEARCH TERMS ENTERED INTO GOOGLE'S SEARCH ENGINE THROUGHOUT 2017

#	QUERY	INDEX	#	QUERY	INDEX
01	TIEMPO	100	11	AMAZON	29
02	FACEBOOK	98	12	GMAIL	27
03	YOUTUBE	60	13	EL MUNDO	25
04	GOOGLE	51	14	NOTICIAS	22
05	BARCELONA	50	15	SANTANDER	22
06	TRADUCTOR	48	16	EL PAIS	20
07	EL TIEMPO	45	17	CAIXA	20
08	HOTMAIL	45	18	MILANUNCIOS	17
09	MARCA	36	19	LA CAIXA	16
10	AS	34	20	INSTAGRAM	16

SOURCE: GOOGLE TRENDS, JANUARY 2018. **NOTES:** GOOGLE DOES NOT PUBLISH SEARCH VOLUMES, BUT THE 'INDEX' COLUMN SHOWS RELATIVE VOLUME FOR EACH QUERY COMPARED TO THE SEARCH VOLUME FOR THE TOP QUERY (AN INDEX OF 50 MEANS THAT THE QUERY RECEIVED 50% OF THE SEARCH VOLUME OF THE TOP QUERY).

JAN 2018

FREQUENCY OF WATCHING ONLINE VIDEO

HOW OFTEN INTERNET USERS WATCH ONLINE VIDEOS (ANY DEVICE)

WATCH ONLINE VIDEOS EVERY DAY	WATCH ONLINE VIDEOS EVERY WEEK	WATCH ONLINE VIDEOS EVERY MONTH	WATCH ONLINE VIDEOS LESS THAN ONCE A MONTH	NEVER WATCH ONLINE VIDEOS
1	7	31	365	X
53%	23%	8%	2%	14%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

JAN 2018

HOW INTERNET USERS WATCH TELEVISION

COMPARISON OF THE METHODS AND DEVICES USED FOR ACCESSING AND DISPLAYING 'TELEVISION' CONTENT

REGULAR TELEVISION ON A TV SET	RECORDED CONTENT ON A TV SET	CATCH-UP / ON-DEMAND SERVICE ON TV SET	ONLINE CONTENT STREAMED ON A TV SET	ONLINE CONTENT STREAMED ON ANOTHER DEVICE
96%	29%	30%	25%	31%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

JAN 2018

SOCIAL MEDIA USE

BASED ON THE MONTHLY ACTIVE USERS REPORTED BY THE MOST ACTIVE SOCIAL MEDIA PLATFORM IN EACH COUNTRY

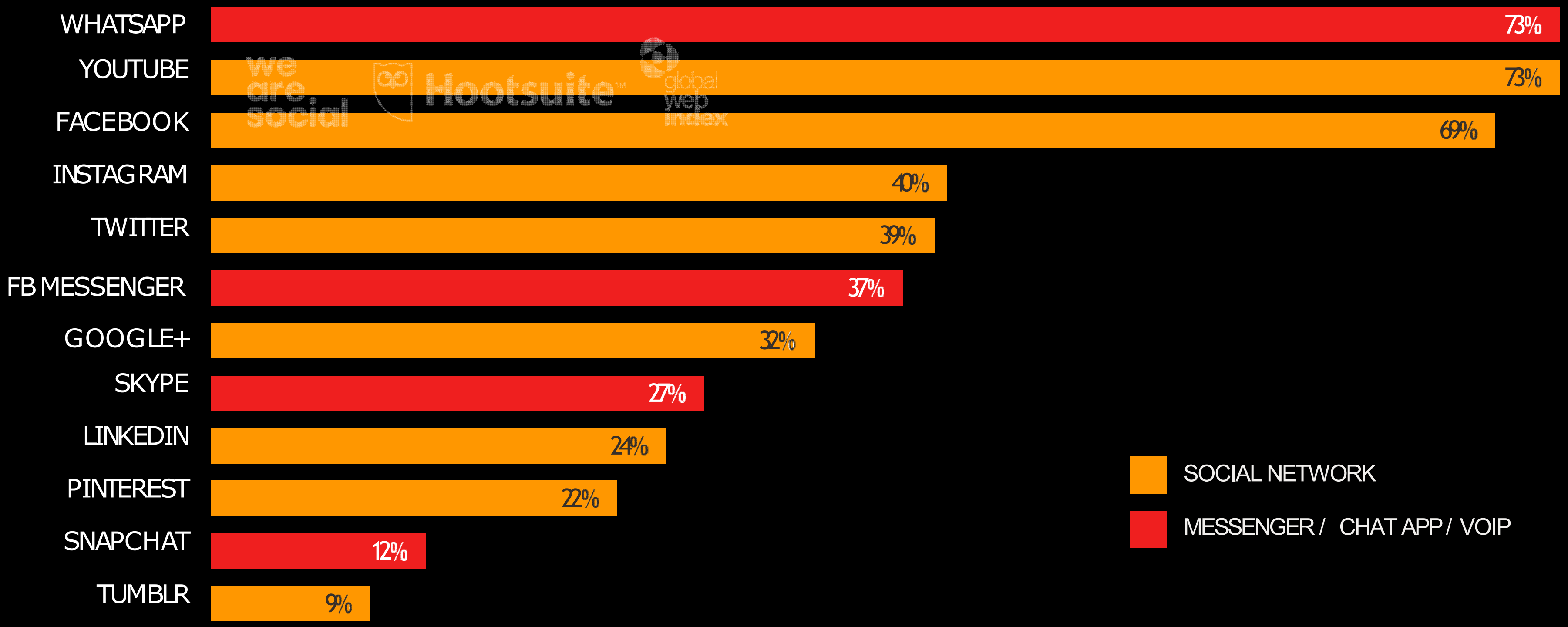
TOTAL NUMBER OF ACTIVE SOCIAL MEDIA USERS	ACTIVE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION	TOTAL NUMBER OF SOCIAL USERS ACCESSING VIA MOBILE	ACTIVE MOBILE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION
27.00 MILLION	58%	23.00 MILLION	50%

SOURCES: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS
NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOST ACTIVE SOCIAL MEDIA PLATFORMS

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64. **NOTES:** DATA FOR PLATFORMS WITH AN ASTERISK (*) IS COLLECTED IN A DIFFERENT PART OF THE SURVEY TO OTHER PLATFORM DATA. ALL DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE. **ADVISORY:** FIGURES ARE BASED ON RESPONSES TO A SURVEY, AND MAY NOT CORRELATE TO SOCIAL MEDIA PENETRATION FIGURES SHOWN ELSEWHERE IN THIS REPORT; FOR FULL DETAILS, SEE THE NOTES AT THE END OF THIS REPORT.

JAN 2018

FACEBOOK USAGE ANALYSIS

A CLOSER LOOK AT FACEBOOK USE, BROKEN DOWN BY MOBILE USE AND SELF-DECLARED GENDER OF USERS

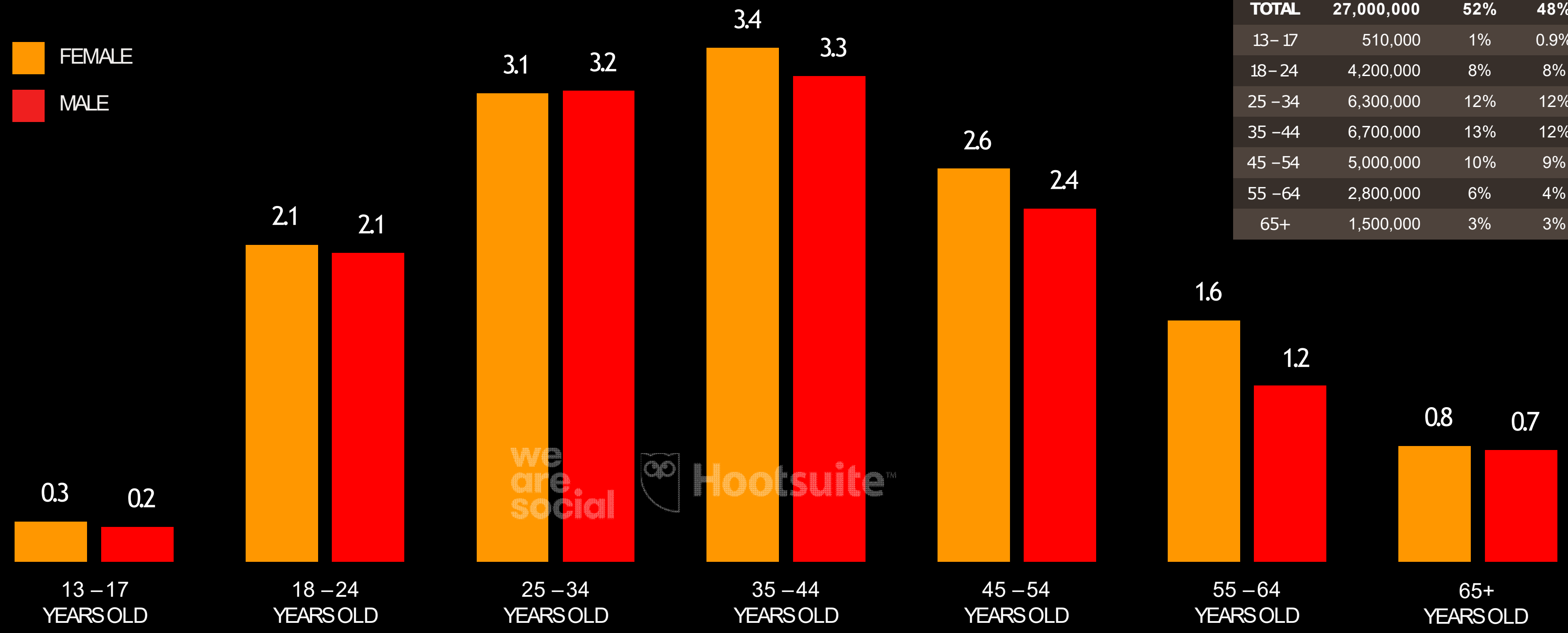
TOTAL NUMBER OF MONTHLY ACTIVE FACEBOOK USERS	ANNUAL CHANGE IN FACEBOOK USERS vs. JANUARY 2017	PERCENTAGE OF FACEBOOK USERS ACCESSING VIA MOBILE	PERCENTAGE OF FACEBOOK PROFILES DECLARED AS FEMALE	PERCENTAGE OF FACEBOOK PROFILES DECLARED AS MALE
27.00 MILLION	+8%	85%	52%	48%

SOURCE: EXTRAPOLATION OF FACEBOOK DATA, JANUARY 2018.

JAN 2018

PROFILE OF FACEBOOK USERS

A BREAKDOWN OF THE COUNTRY'S FACEBOOK'S USERS BY AGE AND GENDER, IN MILLIONS



AGE	TOTAL	FEMALE	MALE
TOTAL	**27,000,000**	**52%**	**48%**
13 – 17	510,000	1%	0.9%
18 – 24	4,200,000	8%	8%
25 – 34	6,300,000	12%	12%
35 – 44	6,700,000	13%	12%
45 – 54	5,000,000	10%	9%
55 – 64	2,800,000	6%	4%
65+	1,500,000	3%	3%

SOURCE: EXTRAPOLATION OF FACEBOOK DATA, JANUARY 2018. **NOTES:** THE 'TOTAL' COLUMN OF THE INSET TABLE SHOWS ORIGINAL VALUES, WHILE GRAPH VALUES HAVE BEEN DIVIDED BY ONE MILLION. TABLE PERCENTAGES REPRESENT THE RESPECTIVE GENDER AND AGE GROUP'S SHARE OF TOTAL NATIONAL FACEBOOK USERS. TABLE VALUES MAY NOT SUM EXACTLY DUE TO ROUNDING IN THE SOURCE DATA.

JAN 2018

AVERAGE FACEBOOK PAGE POST REACH

AVERAGE MONTHLY GROWTH IN PAGE LIKES ('FANS'), AVERAGE REACH OF PAGE POSTS vs. PAGE LIKES, AND PAID MEDIA

AVERAGE MONTHLY CHANGE IN PAGE LIKES	AVERAGE POST REACH vs. PAGE LIKES	AVERAGE ORGANIC REACH vs. PAGE LIKES	PERCENTAGE OF PAGES USING PAID MEDIA	AVERAGE PAID REACH vs. TOTAL REACH
+0.41%	19.2%	14.3%	24.1%	26.8%

SOURCE: LOCOWISE, JANUARY 2018. DATA REPRESENTS AVERAGE FIGURES FOR FULL-YEAR 2017. **NOTE:** REACH FIGURES COMPARE THE NUMBER OF TIMES THAT A POST WAS SERVED IN USERS' NEWSFEEDS TO THE TOTAL NUMBER OF PAGE 'FANS' (I.E. USERS THAT HAD LIKED THE PAGE) AT THE TIME THAT THE POST WAS PUBLISHED.

JAN 2018

AVERAGE FACEBOOK ENGAGEMENT RATES

THE NUMBER OF PEOPLE WHO ENGAGE WITH A FACEBOOK PAGE'S POSTS vs. THE NUMBER OF PEOPLE THAT THOSE POSTS REACH

AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE POSTS (ALL TYPES)	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE VIDEO POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE PHOTO POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE LINK POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE STATUS POSTS
3.99%	4.42%	5.08%	4.10%	4.70%

SOURCE: LOCOWISE, JANUARY 2018. DATA REPRESENTS AVERAGE FIGURES FOR FULL-YEAR 2017. **NOTE:** ENGAGEMENT RATES COMPARE THE NUMBER OF PEOPLE WHO INTERACTED WITH A POST TO THE TOTAL NUMBER OF UNIQUE USERS TO WHOM THAT POST WAS SERVED, REGARDLESS OF WHETHER THOSE USERS WERE FANS OF THE PAGE AT THAT TIME.

JAN 2018

INSTAGRAM USAGE ANALYSIS

AN OVERVIEW OF MONTHLY ACTIVE INSTAGRAM USERS, BROKEN DOWN BY GENDER

TOTAL NUMBER OF MONTHLY ACTIVE INSTAGRAM USERS	ACTIVE INSTAGRAM USERS AS A PERCENTAGE OF TOTAL POPULATION	FEMALE USERS AS A PERCENTAGE OF ALL ACTIVE INSTAGRAM USERS	MALE USERS AS A PERCENTAGE OF ALL ACTIVE INSTAGRAM USERS
13.00 MILLION	28%	55%	45%

SOURCE: EXTRAPOLATION OF DATA FROM INSTAGRAM (VIA FACEBOOK), JANUARY 2018. PENETRATION RATES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOBILE USERS vs. MOBILE CONNECTIONS

COMPARING THE NUMBER OF UNIQUE MOBILE USERS TO THE NUMBER OF MOBILE CONNECTIONS

NUMBER OF UNIQUE MOBILE USERS (ANY TYPE OF HANDSET)	MOBILE PENETRATION (UNIQUE USERS vs. TOTAL POPULATION)	TOTAL NUMBER OF MOBILE CONNECTIONS	MOBILE CONNECTIONS AS A PERCENTAGE OF TOTAL POPULATION	AVERAGE NUMBER OF CONNECTIONS PER UNIQUE MOBILE USER
37.27 MILLION	80%	55.51 MILLION	120%	1.49

SOURCES: UNIQUE MOBILE USERS: GSMA INTELLIGENCE, JANUARY 2018; GOOGLE CONSUMER BAROMETER, JANUARY 2018; MOBILE CONNECTIONS: GSMA INTELLIGENCE, Q4 2017. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOBILE CONNECTIONS BY TYPE

BASED ON THE NUMBER OF CELLULAR CONNECTIONS (NOTE: NOT UNIQUE INDIVIDUALS)

TOTAL NUMBER OF MOBILE CONNECTIONS	MOBILE CONNECTIONS AS A PERCENTAGE OF TOTAL POPULATION	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE PRE-PAID	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE POST-PAID	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE BROADBAND (3G & 4G)
55.51 MILLION	120%	27%	73%	83%

SOURCE: GSMA INTELLIGENCE, Q4 2017. NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

MOBILE CONNECTIVITY INDEX

GSMA INTELLIGENCE'S ASSESSMENT OF THE COUNTRY'S KEY ENABLERS AND DRIVERS OF MOBILE CONNECTIVITY

OVERALL COUNTRY INDEX SCORE	MOBILE NETWORK INFRASTRUCTURE	AFFORDABILITY OF DEVICES & SERVICES	CONSUMER READINESS	AVAILABILITY OF RELEVANT CONTENT & SERVICES
78.91	71.53	75.77	86.94	82.29
OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100

SOURCE: GSMA INTELLIGENCE, Q4 2017. TO ACCESS THE COMPLETE MOBILE CONNECTIVITY INDEX, VISIT HTTP://WWW.MOBILECONNECTIVITYINDEX.COM/

JAN 2018

MOBILE ACTIVITIES

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

PERCENTAGE OF THE POPULATION USING MOBILE MESSENGERS	PERCENTAGE OF THE POPULATION WATCHING VIDEOS ON MOBILE	PERCENTAGE OF THE POPULATION PLAYING GAMES ON MOBILE	PERCENTAGE OF THE POPULATION USING MOBILE BANKING	PERCENTAGE OF THE POPULATION USING MOBILE MAP SERVICES
71%	60%	41%	36%	59%

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

SMARTPHONE LIFE MANAGEMENT ACTIVITIES

PERCENTAGE OF THE TOTAL POPULATION USING A SMARTPHONE TO PERFORM EACH TASK [SURVEY-BASED]

USE THE ALARM CLOCK FUNCTION	MANAGE DIARY OR APPOINTMENTS	CHECK THE WEATHER	TRACK HEALTH, DIET, OR ACTIVITY LEVELS
51%	26%	36%	3%

TAKE PHOTOS OR VIDEOS	CHECK THE NEWS	READ E-BOOKS OR E-MAGAZINES	MANAGE LISTS (E.G. SHOPPING, TASKS)
54%	25%	5%	14%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTES:** DATA BASED ON SURVEY RESPONSES FROM ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

TOP APP RANKINGS

RANKINGS OF TOP MOBILE APPS BY MONTHLY ACTIVE USERS AND BY NUMBER OF DOWNLOADS

RANKING OF MOBILE APPS BY MONTHLY ACTIVE USERS

#	APP NAME	DEVELOPER / COMPANY
01	WHATSAPP MESSENGER	FACEBOOK
02	FACEBOOK	FACEBOOK
03	INSTAGRAM	FACEBOOK
04	FACEBOOK MESSENGER	FACEBOOK
05	TWITTER	TWITTER
06	SPOTIFY	SPOTIFY
07	WALLAPOP	WALLAPOP
08	AMAZON	AMAZON
09	SHAZAM	SHAZAM ENTERTAINMENT
10	DROPBOX	DROPBOX

RANKING OF MOBILE APPS BY NUMBER OF DOWNLOADS

#	APP NAME	DEVELOPER / COMPANY
01	WHATSAPP MESSENGER	FACEBOOK
02	INSTAGRAM	FACEBOOK
03	FACEBOOK MESSENGER	FACEBOOK
04	FACEBOOK	FACEBOOK
05	WALLAPOP	WALLAPOP
06	AMAZON	AMAZON
07	NETFLIX	NETFLIX
08	WISH	CONTEXTLOGIC
09	SPOTIFY	SPOTIFY
10	SNAPCHAT	SNAP

SOURCE: APP ANNIE, JANUARY 2018, BASED ON DATA IN THE *APP ANNIE 2017 RETROSPECTIVE* REPORT. FOR MORE DETAILS, VISIT HTTPS://WWW.APPANNIE.COM/
NOTES: RANKINGS ARE BASED ON COMBINED DATA FOR BOTH THE APPLE iOS APP STORE AND THE GOOGLE PLAY APP STORE. MONTHLY ACTIVE USER RANKINGS ARE BASED ON MONTHLY AVERAGES FOR FULL-YEAR 2017. **NOTE:** RANKINGS EXCLUDE PRE-INSTALLED APPS, SUCH AS YOUTUBE ON ANDROID DEVICES, AND SAFARI ON APPLE DEVICES.

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FINANCIAL INCLUSION FACTORS

PERCENTAGE OF THE POPULATION AGED 15+ THAT REPORTS OWNING OR USING EACH FINANCIAL PRODUCT OR SERVICE

HAS A BANK ACCOUNT

98%

HAS A CREDIT CARD

54%

MAKES AND / OR RECEIVES MOBILE PAYMENTS VIA GSMA

[N/A]

MAKES ONLINE PURCHASES AND / OR PAYS BILLS ONLINE

57%

PERCENTAGE OF WOMEN WITH A CREDIT CARD

52%

PERCENTAGE OF MEN WITH A CREDIT CARD

57%

PERCENTAGE OF WOMEN MAKING INTERNET PAYMENTS

50%

PERCENTAGE OF MEN MAKING INTERNET PAYMENTS

65%

SOURCE: WORLD BANK GLOBAL FINANCIAL INCLUSION DATA (2015). **NOTE:** FIGURES REPRESENT THE PERCENTAGE OF PEOPLE AGED 15+, NOT TOTAL POPULATION.

JAN 2018

E-COMMERCE ACTIVITIES IN PAST 30 DAYS

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

SEARCHED ONLINE FOR A PRODUCT OR SERVICE TO BUY	VISITED AN ONLINE RETAIL STORE	PURCHASED A PRODUCT OR SERVICE ONLINE	MADE AN ONLINE PURCHASE VIA A LAPTOP OR DESKTOP COMPUTER	MADE AN ONLINE PURCHASE VIA A MOBILE DEVICE
71%	74%	59%	26%	26%

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

E-COMMERCE SPEND BY CATEGORY

TOTAL ANNUAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS

Category	Spend
FASHION & BEAUTY	$6.768 BILLION
ELECTRONICS & PHYSICAL MEDIA	$3.354 BILLION
FOOD & PERSONAL CARE	$1.500 BILLION
FURNITURE & APPLIANCES	$1.737 BILLION
TOYS, DIY & HOBBIES	$3.783 BILLION
TRAVEL (INCLUDING ACCOMMODATION)	$4.274 BILLION
DIGITAL MUSIC	$0.118 BILLION
VIDEO GAMES	$0.681 BILLION

SOURCES: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY, AND DIGITAL MEDIA INDUSTRY, ALL ACCESSED JANUARY 2018.
NOTE: FIGURES ARE BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND IN 2017, AND DO NOT INCLUDE B2B SPEND.

JAN 2018

E-COMMERCE GROWTH BY CATEGORY

ANNUAL CHANGE IN THE TOTAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS

FASHION & BEAUTY	ELECTRONICS & PHYSICAL MEDIA	FOOD & PERSONAL CARE	FURNITURE & APPLIANCES
+14%	+7%	+13%	+12%

TOYS, DIY & HOBBIES	TRAVEL (INCLUDING ACCOMMODATION)	DIGITAL MUSIC	VIDEO GAMES
+6%	+10%	+11%	+7%

SOURCES: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY, AND DIGITAL MEDIA INDUSTRY, ALL ACCESSED JANUARY 2018.
NOTE: FIGURES ARE BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND IN 2017, AND DO NOT INCLUDE B2B SPEND.

E-COMMERCE DETAIL: CONSUMER GOODS

AN OVERVIEW OF THE E-COMMERCE MARKET FOR CONSUMER GOODS, WITH VALUES IN UNITED STATES DOLLARS

TOTAL NUMBER OF PEOPLE PURCHASING CONSUMER GOODS VIA E-COMMERCE

23.47
MILLION

YEAR-ON-YEAR CHANGE:
+5%

PENETRATION OF CONSUMER GOODS E-COMMERCE (TOTAL POPULATION)

51%

VALUE OF THE CONSUMER GOODS E-COMMERCE MARKET (TOTAL ANNUAL SALES REVENUE)

$17.14
BILLION

YEAR-ON-YEAR CHANGE:
+11%

AVERAGE ANNUAL REVENUE PER USER OF CONSUMER GOODS E-COMMERCE (ARPU)

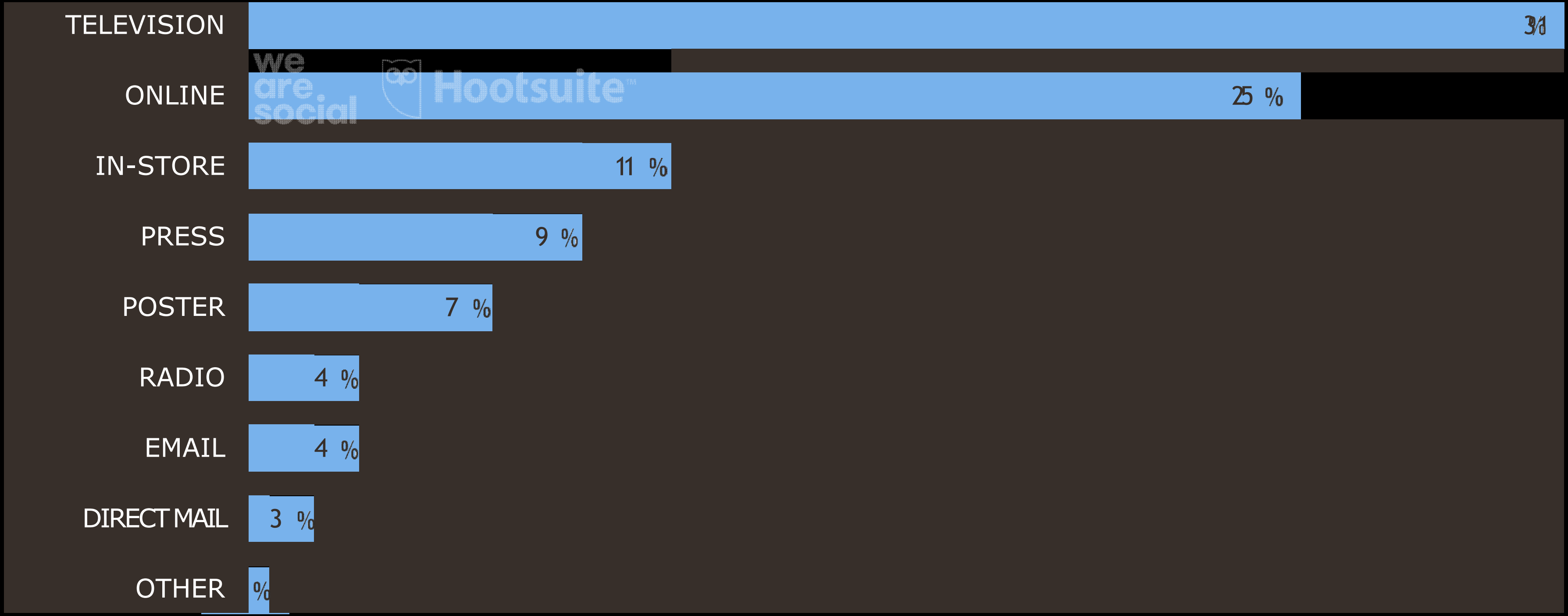
$730

YEAR-ON-YEAR CHANGE:
+5%

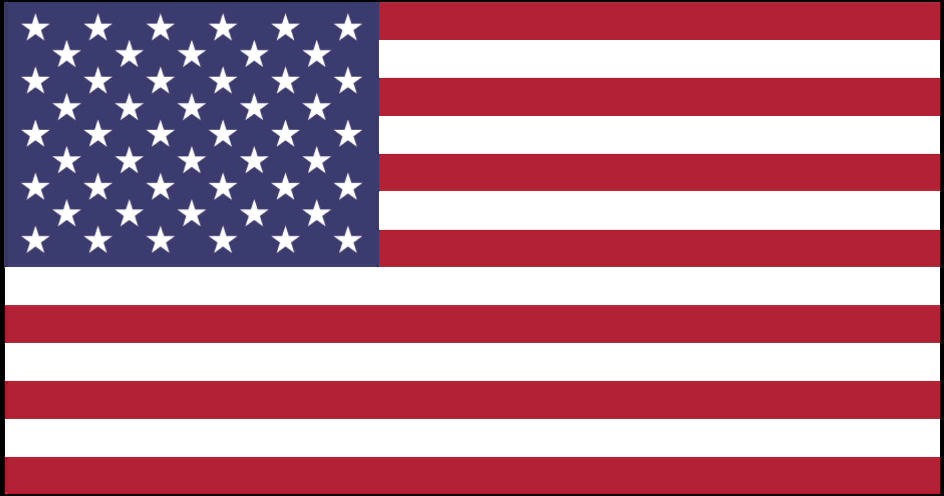
SOURCE: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, ACCESSED JANUARY 2018. **NOTES:** FIGURES REPRESENT SALES OF PHYSICAL GOODS VIA DIGITAL CHANNELS ON ANY DEVICE TO PRIVATE END USERS, AND DO NOT INCLUDE DIGITAL MEDIA, DIGITAL SERVICES SUCH AS TRAVEL OR SOFTWARE, B2B PRODUCTS AND SERVICES, RESALE OF USED GOODS, OR SALES BETWEEN PRIVATE PERSONS (P2P COMMERCE). PENETRATION FIGURE REPRESENTS PERCENTAGE OF TOTAL POPULATION, REGARDLESS OF AGE.

ADVERTISING MEDIA: FIRST AWARENESS

THE CHANNEL THAT FIRST INTRODUCED INTERNET USERS* TO A PRODUCT OR SERVICE THAT THEY SUBSEQUENTLY PURCHASED



SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. *NOTE: DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. FIGURES MAY NOT TOTAL TO 100% DUE TO ROUNDING.



UNITED STATES OF AMERICA

DIGITAL IN THE UNITED STATES OF AMERICA

A SNAPSHOT OF THE COUNTRY'S KEY DIGITAL STATISTICAL INDICATORS

TOTAL POPULATION	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
325.6 MILLION	286.9 MILLION	230.0 MILLION	234.8 MILLION	200.0 MILLION
URBANISATION: 82%	PENETRATION: 88%	PENETRATION: 71%	PENETRATION: 72%	PENETRATION: 61%

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION (ALL AGES).

JAN 2018

ANNUAL DIGITAL GROWTH

YEAR-ON-YEAR CHANGE IN KEY STATISTICAL INDICATORS

INTERNET USERS	ACTIVE SOCIAL MEDIA USERS	UNIQUE MOBILE USERS	ACTIVE MOBILE SOCIAL USERS
0%	+7%	+6%	+5%
SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017	SINCE JAN 2017
(UNCHANGED)	+16 MILLION	+13 MILLION	+10 MILLION

SOURCES: POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU; INTERNET: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; SOCIAL MEDIA AND MOBILE SOCIAL MEDIA: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS; MOBILE: GSMA INTELLIGENCE; GOOGLE; ERICSSON; KEPIOS ANALYSIS. GROWTH DATA: WE ARE SOCIAL & HOOTSUITE'S *DIGITAL IN 2017* REPORT.

JAN 2018

POPULATION &ECONOMIC INDICATORS

ESSENTIAL DEMOGRAPHICS AND KEY ECONOMIC INDICATORS

TOTAL POPULATION	FEMALE POPULATION	MALE POPULATION	ANNUAL CHANGE IN POPULATION SIZE	MEDIAN AGE
325.6 MILLION	50.5%	49.5%	+0.7%	38.2 YEARS OLD

POPULATION LIVING IN URBAN AREAS	GDP PER CAPITA	LITERACY (TOTAL)	FEMALE LITERACY	MALE LITERACY
82%	$57,638	99%	99%	99%

SOURCES: UNITED NATIONS; US CENSUS BUREAU; UNESCO; WORLD BANK, IMF; CIA WORLD FACTBOOK.

DEVICE USAGE

PERCENTAGE OF THE ADULT POPULATION* THAT CURRENTLY USES EACH KIND OF DEVICE [SURVEY-BASED]

MOBILE PHONE (ANY TYPE)	SMART PHONE	LAPTOP OR DESKTOP COMPUTER	TABLET COMPUTER
90%	78%	77%	46%

TELEVISION (ANY KIND)	DEVICE FOR STREAMING INTERNET CONTENT TO TV	E-READER DEVICE	WEARABLE TECH DEVICE
89%	28%	10%	14%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. *NOTE: DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

JAN 2018

TIME SPENT WITH MEDIA

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

AVERAGE DAILY TIME SPENT USING THE INTERNET VIA ANY DEVICE	AVERAGE DAILY TIME SPENT USING SOCIAL MEDIA VIA ANY DEVICE	AVERAGE DAILY TV VIEWING TIME (BROADCAST, STREAMING AND VIDEO ON DEMAND)	AVERAGE DAILY TIME SPENT LISTENING TO STREAMING MUSIC
6H 30M	2H 01M	4H 00M	1H 13M

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: TIME SPENT USING SOCIAL MEDIA INCLUDES SOCIAL NETWORKS AS WELL AS MESSENGERS / CHAT APPS.

JAN 2018

ATTITUDES TOWARDS DIGITAL

HOW INTERNET USERS* PERCEIVE THE ROLE OF TECHNOLOGY, AND THEIR PERSPECTIVE ON PRIVACY ISSUES

BELIEVE THAT NEW TECHNOLOGIES OFFER MORE OPPORTUNITIES THAN RISKS	PREFER TO COMPLETE TASKS DIGITALLY WHENEVER POSSIBLE	BELIEVE DATA PRIVACY AND PROTECTION ARE VERY IMPORTANT	DELETE COOKIES FROM INTERNET BROWSER TO PROTECT PRIVACY	USE AN AD-BLOCKING TOOL TO STOP ADVERTS BEING DISPLAYED
54%	53%	86%	52%	45%

SOURCES: GOOGLE CONSUMER BAROMETER, JANUARY 2018; GLOBALWEBINDEX, Q2 & Q3, 2017. **NOTES:** GOOGLE FIGURES BASED ON A SURVEY OF ADULT INTERNET USERS. SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON METHODOLOGY AND AUDIENCE DEFINITIONS. GLOBALWEBINDEX FIGURES BASED ON A SURVEY OF INTERNET USERS AGED 16-64. ***NOTE:** THESE FIGURES ONLY REPRESENT THE ATTITUDES AND ACTIVITIES OF INTERNET USERS.

INTERNET USE

BASED ON REPORTED INTERNET USER DATA, AND USER-CLAIMED MOBILE INTERNET USE

TOTAL NUMBER OF ACTIVE INTERNET USERS	INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION	TOTAL NUMBER OF ACTIVE MOBILE INTERNET USERS	MOBILE INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION
286.9 MILLION	88%	245.2 MILLION	75%

SOURCES: INTERNETWORLDSTATS; ITU; EUROSTAT; INTERNETLIVESTATS; CIA WORLD FACTBOOK; MIDEASTMEDIA.ORG; FACEBOOK; GOVERNMENT OFFICIALS; REGULATORY AUTHORITIES; REPUTABLE MEDIA; GLOBALWEBINDEX, Q2 & Q3 2017. **NOTES:** GLOBALWEBINDEX DATA IS BASED ON A SURVEY OF INTERNET USERS AGED 16-64, BUT DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE. PENETRATION FIGURES BASED ON POPULATION DATA FROM THE UNITED NATIONS AND THE U.S. CENSUS BUREAU.

JAN 2018

INTERNET USERS: DIFFERENT PERSPECTIVES

REPORTS OF THE TOTAL NUMBER OF INTERNET USERS FROM DIFFERENT DATA PROVIDERS

INTERNET WORLD STATS	ITU (INTERNATIONAL TELECOMMUNICATION UNION)	INTERNET LIVE STATS	CIA WORLD FACTBOOK
286.9 MILLION	248.0 MILLION	286.9 MILLION	248.1 MILLION

SOURCES: INTERNETWORLDSTATS; INTERNATIONAL TELECOMMUNICATION UNION (ITU); INTERNETLIVESTATS; CIA WORLD FACTBOOK; ALL LATEST REPORTED FIGURES AS OF JANUARY 2018.

FREQUENCY OF INTERNET USE

HOW OFTEN INTERNET USERS ACCESS THE INTERNET FOR PERSONAL REASONS (ANY DEVICE)

EVERY DAY	AT LEAST ONCE PER WEEK	AT LEAST ONCE PER MONTH	LESS THAN ONCE PER MONTH
1	7	31	?
86%	8%	5%	1%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTES:** DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. VALUES MAY NOT SUM TO 100% DUE TO "DON'T KNOW" OR INCOMPLETE ANSWERS, OR DUE TO ROUNDING IN THE SOURCE DATA.

JAN 2018

INTERNET CONNECTIONS: SPEED & DEVICES

AVERAGE INTERNET CONNECTION SPEEDS, AND THE DEVICE THAT PEOPLE USE MOST OFTEN TO ACCESS THE INTERNET

AVERAGE INTERNET SPEED VIA FIXED CONNECTIONS	AVERAGE INTERNET SPEED VIA MOBILE CONNECTIONS	ACCESS THE INTERNET MOST OFTEN VIA A COMPUTER OR TABLET	ACCESS EQUALLY VIA A SMARTPHONE AND COMPUTER OR TABLET	ACCESS THE INTERNET MOST OFTEN VIA A SMARTPHONE
77.32 MBPS	27.22 MBPS	21%	33%	35%

SOURCES: OOKLA SPEEDTEST, NOVEMBER 2017; GOOGLE CONSUMER BAROMETER, JANUARY 2018. GOOGLE'S FIGURES BASED ON RESPONSES TO A SURVEY. **NOTES:** DATA REPRESENTS ADULT RESPONDENTS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DEVICE USAGE PERCENTAGES MAY NOT SUM TO 100% DUE TO "DON'T KNOW" OR INCOMPLETE ANSWERS.

JAN 2018

SHARE OF WEB TRAFFIC BY DEVICE

BASED ON EACH DEVICE'S SHARE OF ALL WEB PAGES SERVED TO WEB BROWSERS

LAPTOPS & DESKTOPS	MOBILE PHONES	TABLET DEVICES	OTHER DEVICES
51%	41%	8%	0.30%
YEAR-ON-YEAR CHANGE: -4%	YEAR-ON-YEAR CHANGE: +10%	YEAR-ON-YEAR CHANGE: -15%	YEAR-ON-YEAR CHANGE: +20%

SOURCES: STATCOUNTER, JANUARY 2018, AND STATCOUNTER, JANUARY 2017.

JAN 2018

SIMILARWEB'S RANKING OF TOP WEBSITES

RANKINGS BASED ON AVERAGE MONTHLY TRAFFIC TO EACH WEBSITE IN Q4 2017

#	WEBSITE	CATEGORY	MONTHLY TRAFFIC	TIME PER VISIT	PAGES PER VISIT
01	GOOGLE.COM	SEARCH	18,646,300,000	10M 34S	9.2
02	FACEBOOK.COM	SOCIAL	6,149,900,000	12M 20S	10.5
03	YOUTUBE.COM	TV & VIDEO	4,503,600,000	18M 24S	8.5
04	AMAZON.COM	SHOPPING	2,135,800,000	7M 57S	10.6
05	YAHOO.COM	NEWS & MEDIA	2,082,100,000	7M 20S	6.7
06	PORNHUB.COM	ADULT	1,387,500,000	12M 01S	8.2
07	WIKIPEDIA.ORG	REFERENCE	1,272,700,000	4M 01S	3.1
08	XVIDEOS.COM	ADULT	1,193,100,000	14M 39S	10.1
09	XNXX.COM	ADULT	945,900,000	14M 58S	10.3
10	TWITTER.COM	SOCIAL	945,000,000	8M 11S	6.3

SOURCE: SIMILARWEB, JANUARY 2018, BASED ON AVERAGE MONTHLY DATA FOR Q4 2017. **NOTES:** MONTHLY TRAFFIC REPRESENTS TOTAL VISITS TO EACH SITE, NOT UNIQUE VISITORS. DATA FOR SOME COUNTRIES REPRESENTS DESKTOP TRAFFIC, WHILST OTHERS REPRESENTS TRAFFIC FROM BOTH DESKTOP AND MOBILE DEVICES. **ADVISORY:** SOME WEBSITES REFERENCED ON THIS SLIDE MAY CONTAIN ADULT CONTENT, OR CONTENT THAT IS UNSUITABLE FOR THE WORKPLACE. PLEASE USE CAUTION WHEN VISITING UNKNOWN WEBSITES.

JAN 2018

ALEXA'S RANKING OF TOP WEBSITES

RANKINGS BASED ON THE NUMBER OF VISITORS TO EACH SITE, AND THE NUMBER OF PAGES VIEWED ON EACH SITE PER VISIT

#	WEBSITE	TIME	PAGES
01	GOOGLE.COM	7M 32S	8.56
02	YOUTUBE.COM	8M 18S	4.79
03	FACEBOOK.COM	10M 21S	4.00
04	REDDIT.COM	15M 46S	10.05
05	AMAZON.COM	8M 29S	8.62
06	WIKIPEDIA.ORG	4M 16S	3.31
07	YAHOO.COM	4M 02S	3.61
08	TWITTER.COM	6M 21S	3.21
09	NETFLIX.COM	2M 04S	1.79
10	EBAY.COM	9M 41S	7.22

#	WEBSITE	TIME	PAGES
11	IMGUR.COM	2M 40S	3.14
12	INSTAGRAM.COM	5M 23S	3.34
13	TWITCH.TV	5M 55S	2.91
14	LINKEDIN.COM	5M 19S	4.19
15	CRAIGSLIST.ORG	10M 16S	9.53
16	DIPLY.COM	4M 58S	4.23
17	ESPN.COM	7M 14S	4.23
18	PORNHUB.COM	8M 29S	3.19
19	WIKIA.COM	5M 49S	5.11
20	LIVE.COM	4M 03S	3.41

SOURCE: ALEXA, JANUARY 2018. **NOTES:** 'TIME' REPRESENTS TIME SPENT ON SITE PER DAY. 'PAGES' REPRESENTS NUMBER OF PAGE VIEWS PER DAY. ALEXA USES A COMBINATION OF AVERAGE DAILY VISITORS AND PAGE VIEWS OVER A ONE-MONTH PERIOD TO CALCULATE ITS RANKING. RANKINGS ON THIS SLIDE ARE BASED ON THE MONTH TO 16 JANUARY 2018. **ADVISORY:** SOME WEBSITES REFERENCED ON THIS SLIDE MAY CONTAIN ADULT CONTENT, OR CONTENT THAT IS UNSUITABLE FOR THE WORKPLACE. PLEASE USE CAUTION WHEN VISITING UNKNOWN WEBSITES.

JAN 2018

WEEKLY ONLINE ACTIVITIES BY DEVICE

PERCENTAGE OF THE TOTAL POPULATION* ENGAGING IN EACH ACTIVITY AT LEAST ONCE PER WEEK [SURVEY-BASED]

	USE A SEARCH ENGINE	VISIT A SOCIAL NETWORK	PLAY GAMES	WATCH VIDEOS	LOOK FOR PRODUCT INFORMATION
SMARTPHONE:	55%	52%	15%	40%	31%
COMPUTER:	48%	38%	17%	34%	28%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTES:** DATA BASED ON SURVEY RESPONSES FROM ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

TOP GOOGLE SEARCH QUERIES IN 2017

RANKING OF THE TOP SEARCH TERMS ENTERED INTO GOOGLE'S SEARCH ENGINE THROUGHOUT 2017

#	QUERY	INDEX
01	FACEBOOK	100
02	YOU	96
03	GOOGLE	83
04	WEATHER	71
05	YOUTUBE	58
06	CRAIGSLIST	58
07	NEWS	48
08	AMAZON	39
09	WALMART	29
10	YAHOO	26
11	MOVIES	25
12	GO	22
13	TRUMP	20
14	GMAIL	18
15	FACEBOOK LOGIN	16
16	NFL	16
17	CALCULATOR	16
18	TRANSLATE	15
19	EBAY	14
20	TARGET	14

SOURCE: GOOGLE TRENDS, JANUARY 2018. **NOTES:** GOOGLE DOES NOT PUBLISH SEARCH VOLUMES, BUT THE 'INDEX' COLUMN SHOWS RELATIVE VOLUME FOR EACH QUERY COMPARED TO THE SEARCH VOLUME FOR THE TOP QUERY (AN INDEX OF 50 MEANS THAT THE QUERY RECEIVED 50% OF THE SEARCH VOLUME OF THE TOP QUERY).

FREQUENCY OF WATCHING ONLINE VIDEO

HOW OFTEN INTERNET USERS WATCH ONLINE VIDEOS (ANY DEVICE)

WATCH ONLINE VIDEOS EVERY DAY	WATCH ONLINE VIDEOS EVERY WEEK	WATCH ONLINE VIDEOS EVERY MONTH	WATCH ONLINE VIDEOS LESS THAN ONCE A MONTH	NEVER WATCH ONLINE VIDEOS
1	7	31	365	X
50%	22%	10%	3%	15%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

JAN 2018

HOW INTERNET USERS WATCH TELEVISION

COMPARISON OF THE METHODS AND DEVICES USED FOR ACCESSING AND DISPLAYING 'TELEVISION' CONTENT

REGULAR TELEVISION ON A TV SET	RECORDED CONTENT ON A TV SET	CATCH-UP / ON-DEMAND SERVICE ON TV SET	ONLINE CONTENT STREAMED ON A TV SET	ONLINE CONTENT STREAMED ON ANOTHER DEVICE
78%	46%	41%	30%	31%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. **NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS.

JAN 2018

SOCIAL MEDIA USE

BASED ON THE MONTHLY ACTIVE USERS REPORTED BY THE MOST ACTIVE SOCIAL MEDIA PLATFORM IN EACH COUNTRY

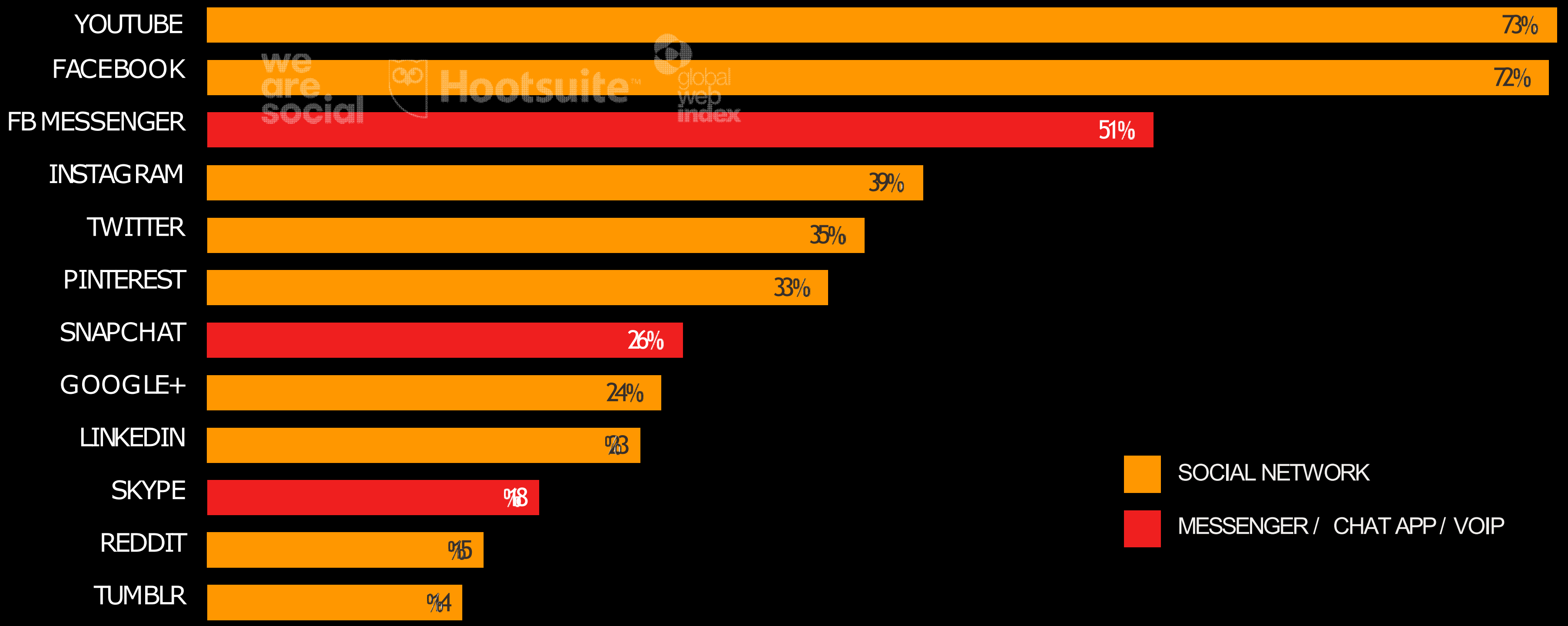
TOTAL NUMBER OF ACTIVE SOCIAL MEDIA USERS	ACTIVE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION	TOTAL NUMBER OF SOCIAL USERS ACCESSING VIA MOBILE	ACTIVE MOBILE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION
230.0 MILLION	71%	200.0 MILLION	61%

SOURCES: FACEBOOK; TENCENT; VKONTAKTE; KAKAO; NAVER; DING; TECHRASA; SIMILARWEB; KEPIOS ANALYSIS
NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOST ACTIVE SOCIAL MEDIA PLATFORMS

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64. **NOTES:** DATA FOR PLATFORMS WITH AN ASTERISK (*) IS COLLECTED IN A DIFFERENT PART OF THE SURVEY TO OTHER PLATFORM DATA. ALL DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE. **ADVISORY:** FIGURES ARE BASED ON RESPONSES TO A SURVEY, AND MAY NOT CORRELATE TO SOCIAL MEDIA PENETRATION FIGURES SHOWN ELSEWHERE IN THIS REPORT; FOR FULL DETAILS, SEE THE NOTES AT THE END OF THIS REPORT.

JAN 2018

FACEBOOK USAGE ANALYSIS

A CLOSER LOOK AT FACEBOOK USE, BROKEN DOWN BY MOBILE USE AND SELF-DECLARED GENDER OF USERS

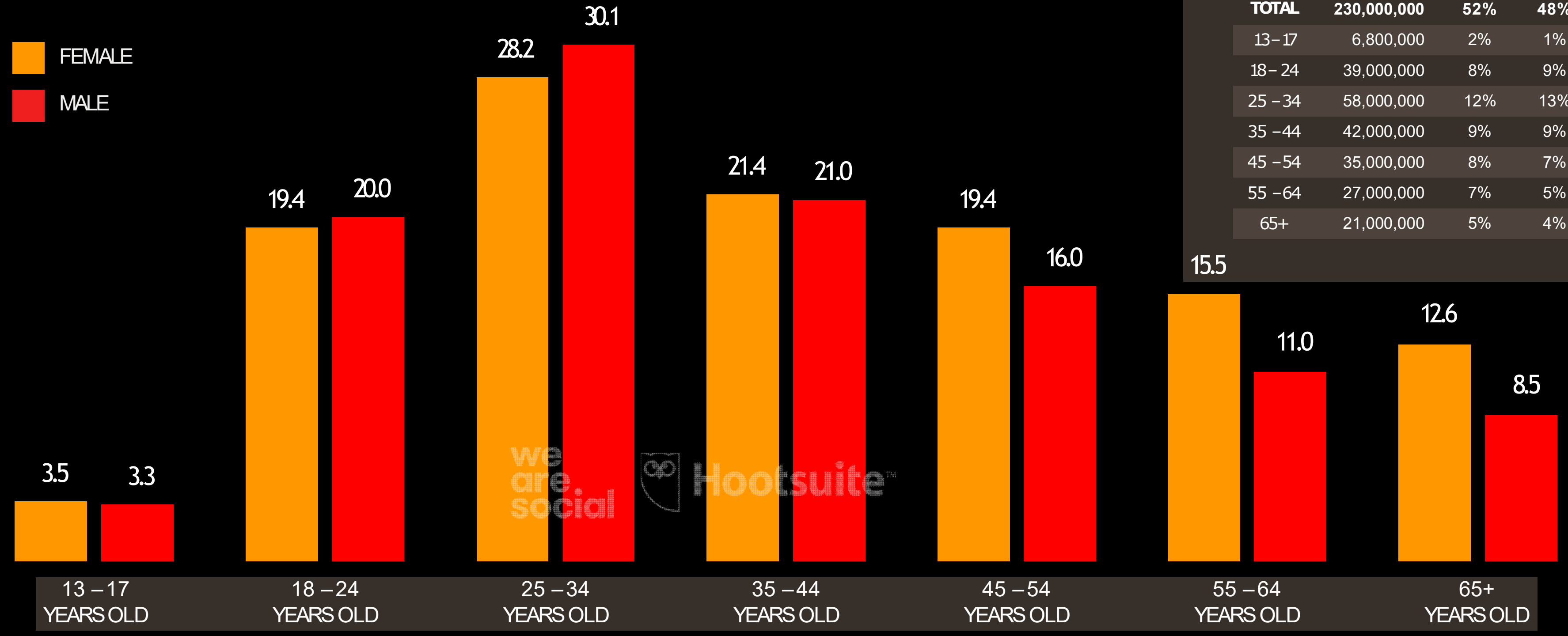
TOTAL NUMBER OF MONTHLY ACTIVE FACEBOOK USERS	ANNUAL CHANGE IN FACEBOOK USERS vs. JANUARY 2017	PERCENTAGE OF FACEBOOK USERS ACCESSING VIA MOBILE	PERCENTAGE OF FACEBOOK PROFILES DECLARED AS FEMALE	PERCENTAGE OF FACEBOOK PROFILES DECLARED AS MALE
230.0 MILLION	+7%	87%	52%	48%

SOURCE: EXTRAPOLATION OF FACEBOOK DATA, JANUARY 2018.

JAN 2018

PROFILE OF FACEBOOK USERS

A BREAKDOWN OF THE COUNTRY'S FACEBOOK'S USERS BY AGE AND GENDER, IN MILLIONS



AGE	TOTAL	FEMALE	MALE
TOTAL	**230,000,000**	**52%**	**48%**
13 – 17	6,800,000	2%	1%
18 – 24	39,000,000	8%	9%
25 – 34	58,000,000	12%	13%
35 – 44	42,000,000	9%	9%
45 – 54	35,000,000	8%	7%
55 – 64	27,000,000	7%	5%
65+	21,000,000	5%	4%

SOURCE: EXTRAPOLATION OF FACEBOOK DATA, JANUARY 2018. **NOTES:** THE 'TOTAL' COLUMN OF THE INSET TABLE SHOWS ORIGINAL VALUES, WHILE GRAPH VALUES HAVE BEEN DIVIDED BY ONE MILLION. TABLE PERCENTAGES REPRESENT THE RESPECTIVE GENDER AND AGE GROUP'S SHARE OF TOTAL NATIONAL FACEBOOK USERS. TABLE VALUES MAY NOT SUM EXACTLY DUE TO ROUNDING IN THE SOURCE DATA.

JAN 2018

AVERAGE FACEBOOK PAGE POST REACH

AVERAGE MONTHLY GROWTH IN PAGE LIKES ('FANS'), AVERAGE REACH OF PAGE POSTS vs. PAGE LIKES, AND PAID MEDIA

AVERAGE MONTHLY CHANGE IN PAGE LIKES	AVERAGE POST REACH vs. PAGE LIKES	AVERAGE ORGANIC REACH vs. PAGE LIKES	PERCENTAGE OF PAGES USING PAID MEDIA	AVERAGE PAID REACH vs. TOTAL REACH
+0.07%	8.8%	6.8%	29.4%	26.4%

SOURCE: LOCOWISE, JANUARY 2018. DATA REPRESENTS AVERAGE FIGURES FOR FULL-YEAR 2017. **NOTE:** REACH FIGURES COMPARE THE NUMBER OF TIMES THAT A POST WAS SERVED IN USERS' NEWSFEEDS TO THE TOTAL NUMBER OF PAGE 'FANS' (I.E. USERS THAT HAD LIKED THE PAGE) AT THE TIME THAT THE POST WAS PUBLISHED.

AVERAGE FACEBOOK ENGAGEMENT RATES

THE NUMBER OF PEOPLE WHO ENGAGE WITH A FACEBOOK PAGE'S POSTS vs. THE NUMBER OF PEOPLE THAT THOSE POSTS REACH

AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE POSTS (ALL TYPES)	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE VIDEO POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE PHOTO POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE LINK POSTS	AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE STATUS POSTS
4.08%	5.64%	5.13%	5.33%	2.71%

SOURCE: LOCOWISE, JANUARY 2018. DATA REPRESENTS AVERAGE FIGURES FOR FULL-YEAR 2017. **NOTE:** ENGAGEMENT RATES COMPARE THE NUMBER OF PEOPLE WHO INTERACTED WITH A POST TO THE TOTAL NUMBER OF UNIQUE USERS TO WHOM THAT POST WAS SERVED, REGARDLESS OF WHETHER THOSE USERS WERE FANS OF THE PAGE AT THAT TIME.

JAN 2018

INSTAGRAM USAGE ANALYSIS

AN OVERVIEW OF MONTHLY ACTIVE INSTAGRAM USERS, BROKEN DOWN BY GENDER

TOTAL NUMBER OF MONTHLY ACTIVE INSTAGRAM USERS	ACTIVE INSTAGRAM USERS AS A PERCENTAGE OF TOTAL POPULATION	FEMALE USERS AS A PERCENTAGE OF ALL ACTIVE INSTAGRAM USERS	MALE USERS AS A PERCENTAGE OF ALL ACTIVE INSTAGRAM USERS
110.0 MILLION	34%	56%	44%

SOURCE: EXTRAPOLATION OF DATA FROM INSTAGRAM (VIA FACEBOOK), JANUARY 2018. PENETRATION RATES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOBILE USERS vs. MOBILE CONNECTIONS

COMPARING THE NUMBER OF UNIQUE MOBILE USERS TO THE NUMBER OF MOBILE CONNECTIONS

NUMBER OF UNIQUE MOBILE USERS (ANY TYPE OF HANDSET)	MOBILE PENETRATION (UNIQUE USERS vs. TOTAL POPULATION)	TOTAL NUMBER OF MOBILE CONNECTIONS	MOBILE CONNECTIONS AS A PERCENTAGE OF TOTAL POPULATION	AVERAGE NUMBER OF CONNECTIONS PER UNIQUE MOBILE USER
234.8 MILLION	72%	340.5 MILLION	105%	1.45

SOURCES: UNIQUE MOBILE USERS: GSMA INTELLIGENCE, JANUARY 2018; GOOGLE CONSUMER BAROMETER, JANUARY 2018; MOBILE CONNECTIONS: GSMA INTELLIGENCE, Q4 2017. **NOTE:** PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOBILE CONNECTIONS BY TYPE

BASED ON THE NUMBER OF CELLULAR CONNECTIONS (NOTE: NOT UNIQUE INDIVIDUALS)

TOTAL NUMBER OF MOBILE CONNECTIONS	MOBILE CONNECTIONS AS A PERCENTAGE OF TOTAL POPULATION	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE PRE-PAID	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE POST-PAID	PERCENTAGE OF MOBILE CONNECTIONS THAT ARE BROADBAND (3G & 4G)
340.5 MILLION	105%	24%	76%	93%

SOURCE: GSMA INTELLIGENCE, Q4 2017. NOTE: PENETRATION FIGURES ARE FOR TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

MOBILE CONNECTIVITY INDEX

GSMA INTELLIGENCE'S ASSESSMENT OF THE COUNTRY'S KEY ENABLERS AND DRIVERS OF MOBILE CONNECTIVITY

OVERALL COUNTRY INDEX SCORE	MOBILE NETWORK INFRASTRUCTURE	AFFORDABILITY OF DEVICES & SERVICES	CONSUMER READINESS	AVAILABILITY OF RELEVANT CONTENT & SERVICES
80.56	69.60	74.47	90.23	90.07
OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100	OUT OF A MAXIMUM POSSIBLE SCORE OF 100

SOURCE: GSMA INTELLIGENCE, Q4 2017. TO ACCESS THE COMPLETE MOBILE CONNECTIVITY INDEX, VISIT HTTP://WWW.MOBILECONNECTIVITYINDEX.COM/

JAN 2018

MOBILE ACTIVITIES

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

PERCENTAGE OF THE POPULATION USING MOBILE MESSENGERS	PERCENTAGE OF THE POPULATION WATCHING VIDEOS ON MOBILE	PERCENTAGE OF THE POPULATION PLAYING GAMES ON MOBILE	PERCENTAGE OF THE POPULATION USING MOBILE BANKING	PERCENTAGE OF THE POPULATION USING MOBILE MAP SERVICES
61%	59%	49%	42%	60%

SMARTPHONE LIFE MANAGEMENT ACTIVITIES

PERCENTAGE OF THE TOTAL POPULATION USING A SMARTPHONE TO PERFORM EACH TASK [SURVEY-BASED]

USE THE ALARM CLOCK FUNCTION	MANAGE DIARY OR APPOINTMENTS	CHECK THE WEATHER	TRACK HEALTH, DIET, OR ACTIVITY LEVELS
42%	19%	52%	11%

TAKE PHOTOS OR VIDEOS	CHECK THE NEWS	READ E-BOOKS OR E-MAGAZINES	MANAGE LISTS (E.G. SHOPPING, TASKS)
53%	32%	9%	20%

SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTES:** DATA BASED ON SURVEY RESPONSES FROM ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

TOP APP RANKINGS

RANKINGS OF TOP MOBILE APPS BY MONTHLY ACTIVE USERS AND BY NUMBER OF DOWNLOADS

RANKING OF MOBILE APPS BY MONTHLY ACTIVE USERS

#	APP NAME	DEVELOPER / COMPANY
01	FACEBOOK	FACEBOOK
02	FACEBOOK MESSENGER	FACEBOOK
03	INSTAGRAM	FACEBOOK
04	SNAPCHAT	SNAP
05	AMAZON	AMAZON
06	PANDORA RADIO	PANDORA
07	PINTEREST	PINTEREST
08	TWITTER	TWITTER
09	NETFLIX	NETFLIX
10	THE WEATHER CHANNEL	THE WEATHER CHANNEL

RANKING OF MOBILE APPS BY NUMBER OF DOWNLOADS

#	APP NAME	DEVELOPER / COMPANY
01	FACEBOOK MESSENGER	FACEBOOK
02	SNAPCHAT	SNAP
03	BITMOJI	SNAP
04	FACEBOOK	FACEBOOK
05	INSTAGRAM	FACEBOOK
06	NETFLIX	NETFLIX
07	PANDORA RADIO	PANDORA
08	WISH	CONTEXTLOGIC
09	SPOTIFY	SPOTIFY
10	AMAZON	AMAZON

SOURCE: APP ANNIE, JANUARY 2018, BASED ON DATA IN THE *APP ANNIE 2017 RETROSPECTIVE* REPORT. FOR MORE DETAILS, VISIT HTTPS://WWW.APPANNIE.COM/ **NOTES:** RANKINGS ARE BASED ON COMBINED DATA FOR BOTH THE APPLE iOS APP STORE AND THE GOOGLE PLAY APP STORE. MONTHLY ACTIVE USER RANKINGS ARE BASED ON MONTHLY AVERAGES FOR FULL-YEAR 2017. **NOTE:** RANKINGS EXCLUDE PRE-INSTALLED APPS, SUCH AS YOUTUBE ON ANDROID DEVICES, AND SAFARI ON APPLE DEVICES.

JAN 2018

FINANCIAL INCLUSION FACTORS

PERCENTAGE OF THE POPULATION AGED 15+ THAT REPORTS OWNING OR USING EACH FINANCIAL PRODUCT OR SERVICE

HAS A BANK ACCOUNT	HAS A CREDIT CARD	MAKES AND / OR RECEIVES MOBILE PAYMENTS VIA GSMA	MAKES ONLINE PURCHASES AND / OR PAYS BILLS ONLINE
94%	60%	[N/A]	65%

PERCENTAGE OF WOMEN WITH A CREDIT CARD	PERCENTAGE OF MEN WITH A CREDIT CARD	PERCENTAGE OF WOMEN MAKING INTERNET PAYMENTS	PERCENTAGE OF MEN MAKING INTERNET PAYMENTS
62%	59%	61%	68%

SOURCE: WORLD BANK GLOBAL FINANCIAL INCLUSION DATA (2015). **NOTE:** FIGURES REPRESENT THE PERCENTAGE OF PEOPLE AGED 15+, NOT TOTAL POPULATION.

E-COMMERCE ACTIVITIES IN PAST 30 DAYS

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

SEARCHED ONLINE FOR A PRODUCT OR SERVICE TO BUY	VISITED AN ONLINE RETAIL STORE	PURCHASED A PRODUCT OR SERVICE ONLINE	MADE AN ONLINE PURCHASE VIA A LAPTOP OR DESKTOP COMPUTER	MADE AN ONLINE PURCHASE VIA A MOBILE DEVICE
76%	82%	69%	36%	36%

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017. BASED ON A SURVEY OF INTERNET USERS AGED 16-64.
NOTE: DATA HAS BEEN REBASED TO SHOW TOTAL NATIONAL PENETRATION, REGARDLESS OF AGE.

JAN 2018

E-COMMERCE SPEND BY CATEGORY

TOTAL ANNUAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS

FASHION & BEAUTY	ELECTRONICS & PHYSICAL MEDIA	FOOD & PERSONAL CARE	FURNITURE & APPLIANCES
$80.96 BILLION	$99.01 BILLION	$46.29 BILLION	$60.69 BILLION

TOYS, DIY & HOBBIES	TRAVEL (INCLUDING ACCOMMODATION)	DIGITAL MUSIC	VIDEO GAMES
$122.25 BILLION	$74.24 BILLION	$5.65 BILLION	$12.15 BILLION

SOURCES: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY, AND DIGITAL MEDIA INDUSTRY, ALL ACCESSED JANUARY 2018.
NOTE: FIGURES ARE BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND IN 2017, AND DO NOT INCLUDE B2B SPEND.

JAN 2018

E-COMMERCE GROWTH BY CATEGORY

ANNUAL CHANGE IN THE TOTAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS

CATEGORY	ANNUAL CHANGE
FASHION & BEAUTY	+12%
ELECTRONICS & PHYSICAL MEDIA	+7%
FOOD & PERSONAL CARE	+15%
FURNITURE & APPLIANCES	+17%
TOYS, DIY & HOBBIES	+18%
TRAVEL (INCLUDING ACCOMMODATION)	+9%
DIGITAL MUSIC	+17%
VIDEO GAMES	+5%

SOURCES: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, E-TRAVEL INDUSTRY, AND DIGITAL MEDIA INDUSTRY, ALL ACCESSED JANUARY 2018.
NOTE: FIGURES ARE BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND IN 2017, AND DO NOT INCLUDE B2B SPEND.

JAN 2018

E-COMMERCE DETAIL: CONSUMER GOODS

AN OVERVIEW OF THE E-COMMERCE MARKET FOR CONSUMER GOODS, WITH VALUES IN UNITED STATES DOLLARS

TOTAL NUMBER OF PEOPLE PURCHASING CONSUMER GOODS VIA E-COMMERCE

224.9 MILLION

YEAR-ON-YEAR CHANGE:

+2%

PENETRATION OF CONSUMER GOODS E-COMMERCE (TOTAL POPULATION)

69%

VALUE OF THE CONSUMER GOODS E-COMMERCE MARKET (TOTAL ANNUAL SALES REVENUE)

$409.2 BILLION

YEAR-ON-YEAR CHANGE:

+14%

AVERAGE ANNUAL REVENUE PER USER OF CONSUMER GOODS E-COMMERCE (ARPU)

$1,819

YEAR-ON-YEAR CHANGE:

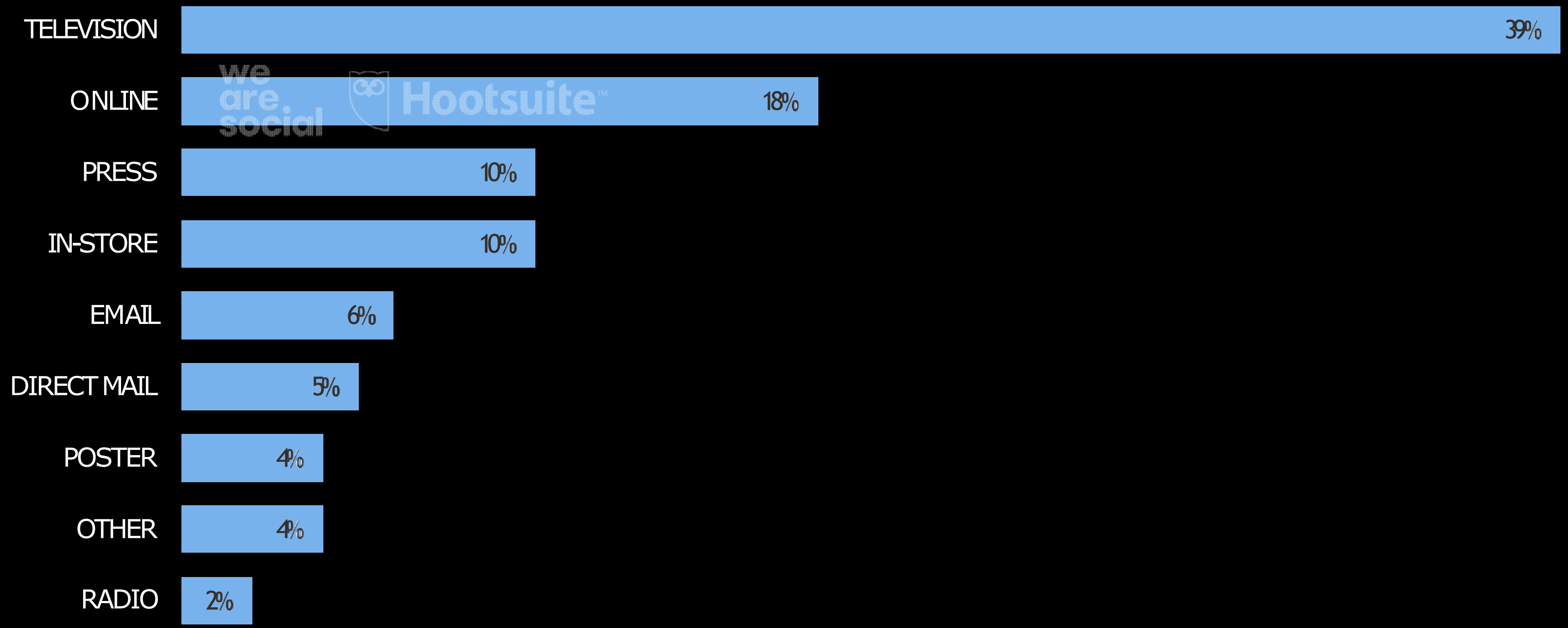
+11%

SOURCE: STATISTA DIGITAL MARKET OUTLOOK, E-COMMERCE INDUSTRY, ACCESSED JANUARY 2018. **NOTES:** FIGURES REPRESENT SALES OF PHYSICAL GOODS VIA DIGITAL CHANNELS ON ANY DEVICE TO PRIVATE END USERS, AND DO NOT INCLUDE DIGITAL MEDIA, DIGITAL SERVICES SUCH AS TRAVEL OR SOFTWARE, B2B PRODUCTS AND SERVICES, RESALE OF USED GOODS, OR SALES BETWEEN PRIVATE PERSONS (P2P COMMERCE). PENETRATION FIGURE REPRESENTS PERCENTAGE OF TOTAL POPULATION, REGARDLESS OF AGE.

JAN 2018

ADVERTISING MEDIA: FIRST AWARENESS

THE CHANNEL THAT FIRST INTRODUCED INTERNET USERS* TO A PRODUCT OR SERVICE THAT THEY SUBSEQUENTLY PURCHASED



SOURCE: GOOGLE CONSUMER BAROMETER, JANUARY 2018. FIGURES BASED ON RESPONSES TO A SURVEY. ***NOTE:** DATA REPRESENTS ADULT INTERNET USERS ONLY; PLEASE SEE THE NOTES AT THE END OF THIS REPORT FOR MORE INFORMATION ON GOOGLE'S METHODOLOGY AND THEIR AUDIENCE DEFINITIONS. FIGURES MAY NOT TOTAL TO 100% DUE TO ROUNDING.

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DATA SOURCES USED IN THIS REPORT & NOTES ON METHODOLOGIES

POPULATION DATA: United Nations World Population Prospects, 2017 Revision; US Census Bureau (accessed January 2018); United Nations World Urbanization Prospects, 2014 Revision. Literacy rates from UNESCO (accessed January 2018). GDP data from World Bank (accessed January 2018). Median age data from US Census Bureau (accessed January 2018).

DIGITAL DEVICE OWNERSHIP DATA: Google Consumer Barometer (accessed January 2018)**.

DIGITAL ATTITUDES DATA: GlobalWebIndex (Q2 & Q3 2017)*; Google Consumer Barometer (accessed January 2018)**.

INTERNET USER DATA: InternetWorldStats (accessed January 2018); ITU, *Individuals Using the Internet*, 2016; Eurostat online database, *Individuals – internet use* (accessed January 2018); CIA World Factbook (accessed January 2018); Northwestern University in Qatar, *Media use in the Middle East, 2017* (accessed January 2018); national government and regulatory body websites; government officials cited in reputable media. Mobile internet use data from GlobalWebIndex (Q2 & Q3 2017)* and extrapolation of data from Facebook (January 2018). Time spent, and mobile internet usage and penetration data extrapolated from GlobalWebIndex (Q2 & Q3 2017)*. Share of web traffic data from StatCounter (January 2018). Frequency of internet use data from Google Consumer Barometer (accessed January 2018)**. Internet connection speed data from Ookla's *Speed Test* (December 2017). Website rankings from SimilarWeb (Q4 2017) and Alexa (December 2017). Google search query rankings from Google Trends (data for 12 months to January 2018). Frequency of use and TV viewing habits from Google Consumer Barometer (accessed January 2018)**.

SOCIAL MEDIA AND MOBILE SOCIAL MEDIA DATA: Latest reported monthly active user numbers from Facebook, Tencent, VKontakte, LINE, Kakao, Google, Sina, Twitter, Skype, Yahoo!, Viber, Baidu, and Snap, as quoted directly in company documents, or as reported by reputable media (all latest data available at time of publishing in January 2018). Time spent on social media from GlobalWebIndex (Q2 & Q3 2017)*. Facebook and Instagram age and gender figures extrapolated from Facebook data (January 2018). Facebook reach and engagement data from Locowise; data represents monthly averages for full-year 2017.

MOBILE PHONE USERS, MOBILE CONNECTIONS, AND MOBILE BROADBAND DATA: Latest reported global and national data from GSMA Intelligence (Q4 2017); extrapolated global data from GSMA Intelligence (January 2018); Ericsson Mobility Report (November 2017). Usage data extrapolated from GlobalWebIndex (Q2 & Q3 2017)*; Google Consumer Barometer (accessed January 2018)**. GSMA Intelligence Mobile Connectivity Index (accessed January 2018): http://www.mobileconnectivityindex.com/ Smartphone Life Management Activity data from Google Consumer Barometer (accessed January 2018). Mobile app rankings and app usage insights taken from App Annie's *2017 Retrospective* and *Why You Mobile Strategy Needs Apps* reports – for more details, visit http://bit.ly/AppAnnie2017.

E-COMMERCE DATA: Statista *Digital Market Outlook*, e-Commerce, e-Travel, and digital media industry reports (accessed January 2018). For more info, visit http://www.statista.com. GlobalWebIndex (Q2 & Q3 2017)*; Google Consumer Barometer (accessed January 2018)**.

FINANCIAL INCLUSION DATA: World Bank Global Financial Inclusion (accessed January 2018).

NOTES: Some 'annual growth' figures are calculated using the data reported in Hootsuite and We Are Social's *Digital in 2017* report: http://bit.ly/GD2017GO.

*GlobalWebIndex manages a panel of more than 18 million connected consumers, collecting data every quarter across 40 countries around the world, and representing 90% of the global internet population. Visit http://www.globalwebindex.net for more details.

**Google's Consumer Barometer polls a nationally representative total population (online & offline) aged 16+ in each country surveyed except in Argentina, Brazil, China, India, Japan, South Korea, Malaysia, Mexico, Philippines, Vietnam, and the USA, where the sample base is aged 18+. For more details on methodology, visit http://consumerbarometer.com/.

NOTES ON DATA VARIANCE, MISMATCHES, AND CURIOSITIES

This report uses data from a wide variety of sources, including market research agencies, internet and social media companies, governments and public bodies, news media, journalists, and our own internal analysis.

Wherever possible, we've prioritised data sources that provide broader geographical coverage, in order to minimise the potential variations between data points, and offer more reliable comparison across countries. However, where we believe that an individual metric provides a more reliable reference, we've used such individual numbers to ensure the most accurate reporting.

Furthermore, due to differing data collection and preparation methodologies used by these organisations, as well as the different sample periods during which the data were collected, there may be significant differences in the reported metrics for similar data points throughout this report.

In particular, data collected via surveys often vary from one report to another, even if those data have been collected by the same organisation using the same methodology and approach in each wave.

Similarly, reports of internet user numbers vary considerably between different sources, due to the complex nature of collecting this data. In part, this is because there are fewer commercial imperatives for governments and regulators to collect and publish regular internet user data compared to, for example, the regular user number updates published by social media companies, who depend on such data to sell their products and services.

However, the latest user numbers published by these companies can be a useful proxy for the number of internet users in countries where no other reliable data are available, because all active social media users must have an active internet connection in order to access social media.

Because of this, on occasion, we've used the latest monthly active user data from social media companies to inform our internet user numbers, especially in less-developed economies, where 'official' internet user numbers are published less frequently. As a result, there are a number of countries in this report where the number of social media users equals the number of internet users.

It's unlikely that 100 percent of internet users in any given country will use the same social media platform though, so in cases where internet and social media user numbers are the same, it's likely that the actual number of internet users will be higher than the number we've reported.

Lastly, in some instances in this year's report, metrics may have decreased year-on-year due to corrections in the source data, actual declines in user numbers, and changes in the primary data source we've used in our reporting due to reasons such as increased reliability, or the non-availability of updated numbers from previous providers.

If you have any questions about specific data points in these reports, or if you'd like to offer your organisation's data for consideration in future reports, please email our reports team: info@kepios.com

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