GLOBAL DIGITAL USERS 2018

Over 80% of Internet Users to Log Online via Mobile Phone

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eMarketer®

GLOBAL DIGITAL USERS 2018: OVER 80% OF INTERNET USERS TO LOG ONLINE VIA MOBILE PHONE

The global population is comprised of two halves—those who access the internet and those who do not. This divide is underscored by internet user penetration worldwide, which will reach 50% in 2019.

There is a gap in digital maturity between advanced economies and developing markets. Internet penetration rates in digitally robust markets in Western Europe and North America hover around 80%. Meanwhile, in less developed parts of Asia-Pacific and the Middle East and Africa, penetration is well below 50%.

A majority of the growth in internet user numbers will take place in Asia-Pacific in 2018. Of the 182.2 million new internet users worldwide this year, we forecast that 42.4 million will reside in China and 54.2 million in India. Over the next few years, markets like India will close the gap in digital maturity, while the Middle East and Africa will continue to lag.

Our complete estimates for internet users worldwide can be found in this report's **accompanying spreadsheet.**

An influx of affordable smartphone models from Chinese manufacturers like Huawei and Xiaomi, along with falling data costs, is driving global internet adoption. Essentially, any consumer going online for the first time will more than likely use a mobile phone for access. By year's end, nearly 84% of internet users worldwide will use the internet on a mobile phone.

Smartphones will be a slower engine of growth in digitally mature regions like North America and Western Europe, where smartphone costs are less of an issue deterring people from owning the devices. This year, more than two-thirds of the population in each region will use a mobile phone for internet access. Consumers in these markets are focused on deepening their digital engagement through smart devices like connected TVs and speakers.

Despite the global push toward smartphone and smart technology adoption, feature phones are still widely used in many countries. Most notably, feature phones represent more than half of the mobile phone market in India and Indonesia, and more than 30% of phones used in Brazil and Japan.

These consumers have been slow to replace their feature phones because of two factors: high smartphone costs and the advanced capabilities of feature phones. In these markets, feature phones are capable of 3G and 4G connectivity, along with access to popular messaging apps like Line and WhatsApp.

Tablets face a greater uphill battle than smartphones for adoption in these countries—and the rest of the world. Tablet penetration among internet users globally will decline throughout the forecast period, falling from 31.7% in 2018 to 29.7% in 2022. Although Apple has reported growth in global iPad sales, this is a result of consumers purchasing new models of iPad devices, rather than purchasing a tablet for the first time. Tablets have yet to justify their cost to consumers who can access many of the same apps on their smartphones.

Behind the Numbers

eMarketer's global digital user estimates are updated on a biannual basis in order to continually incorporate the latest changes and developments in consumers' digital media consumption and technology adoption. eMarketer's forecasting methodology for digital users is based on the analysis of more than 8,000 survey and traffic data points from 428 sources, including research firms, regulatory agencies, historical trends, and country-specific demographic factors. eMarketer also takes inventory for each market of macro-level conditions that generally play a role in internet access/adoption, such as GDP per capita, literacy rates, poverty rates and buying patterns (especially of internet-connected devices), as well as government regulation and infrastructure investment. eMarketer's methodology incorporates ongoing qualitative trends and changes in major company initiatives, partnerships and innovations to deliver an accurate estimate of how internet adoption is expected to develop.

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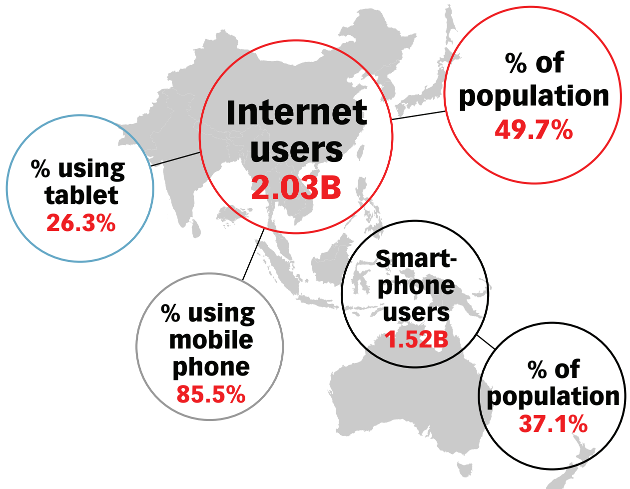

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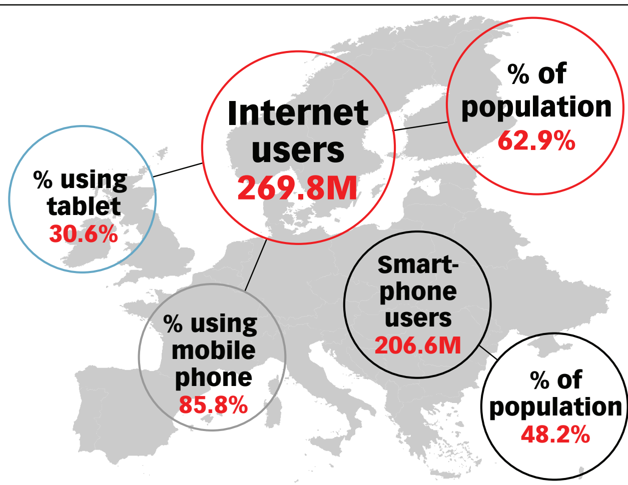

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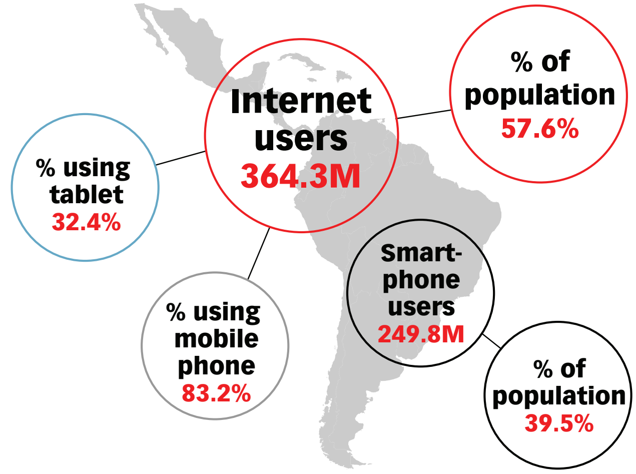

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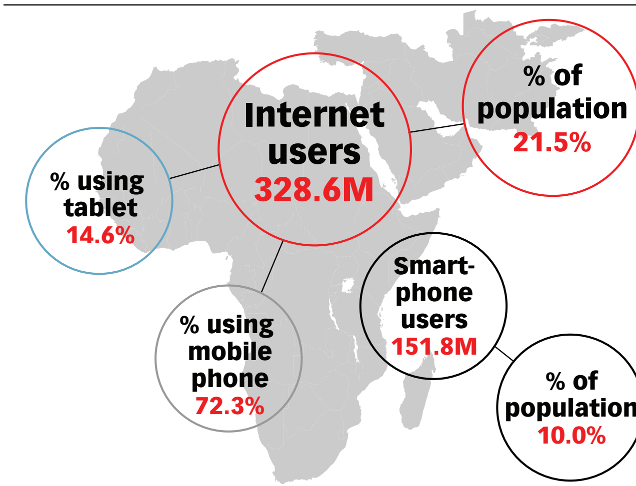

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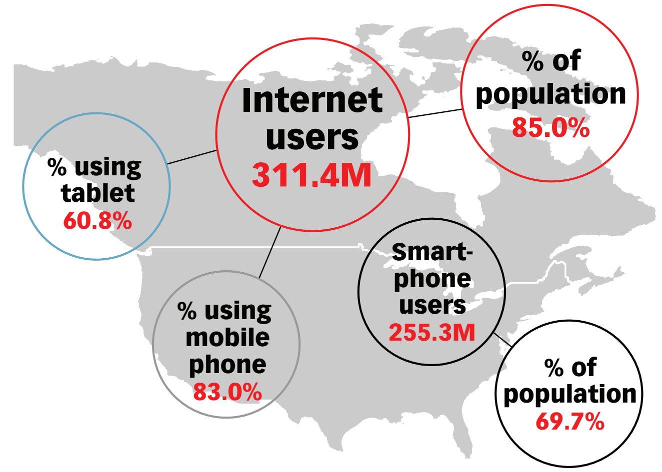

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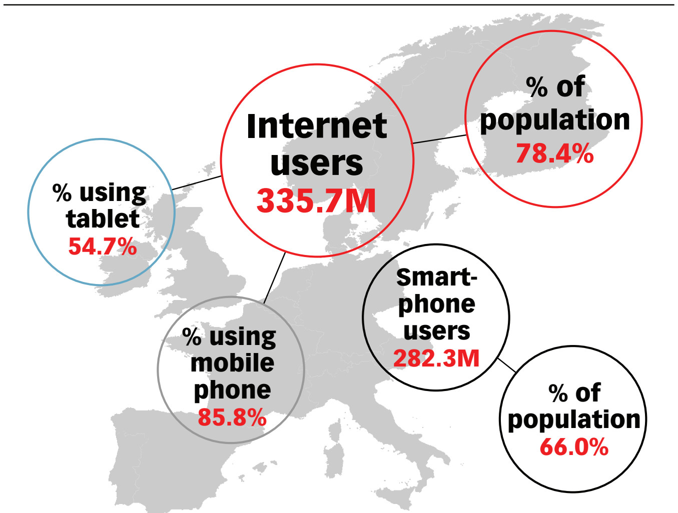

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