GWI Core:
Research & methodology

GWI.

Your step by step guide to how we collect our data

Key numbers

47
markets

2.6bn
internet users represented

700,000
interviews per year

100,000
in the US

40,000
profiling data points

4,000
brands

What is GWI Core?

We began our Core study back in 2009 in response to what was a clear need for a harmonized, global survey on how internet behaviors were evolving.

Starting with an annual study in the first year, it became bi-annual throughout 2010, 2011 and 2012 before being run each quarter from the start of 2013 onwards. At the end of 2021, we will have run 44 separate waves of research.
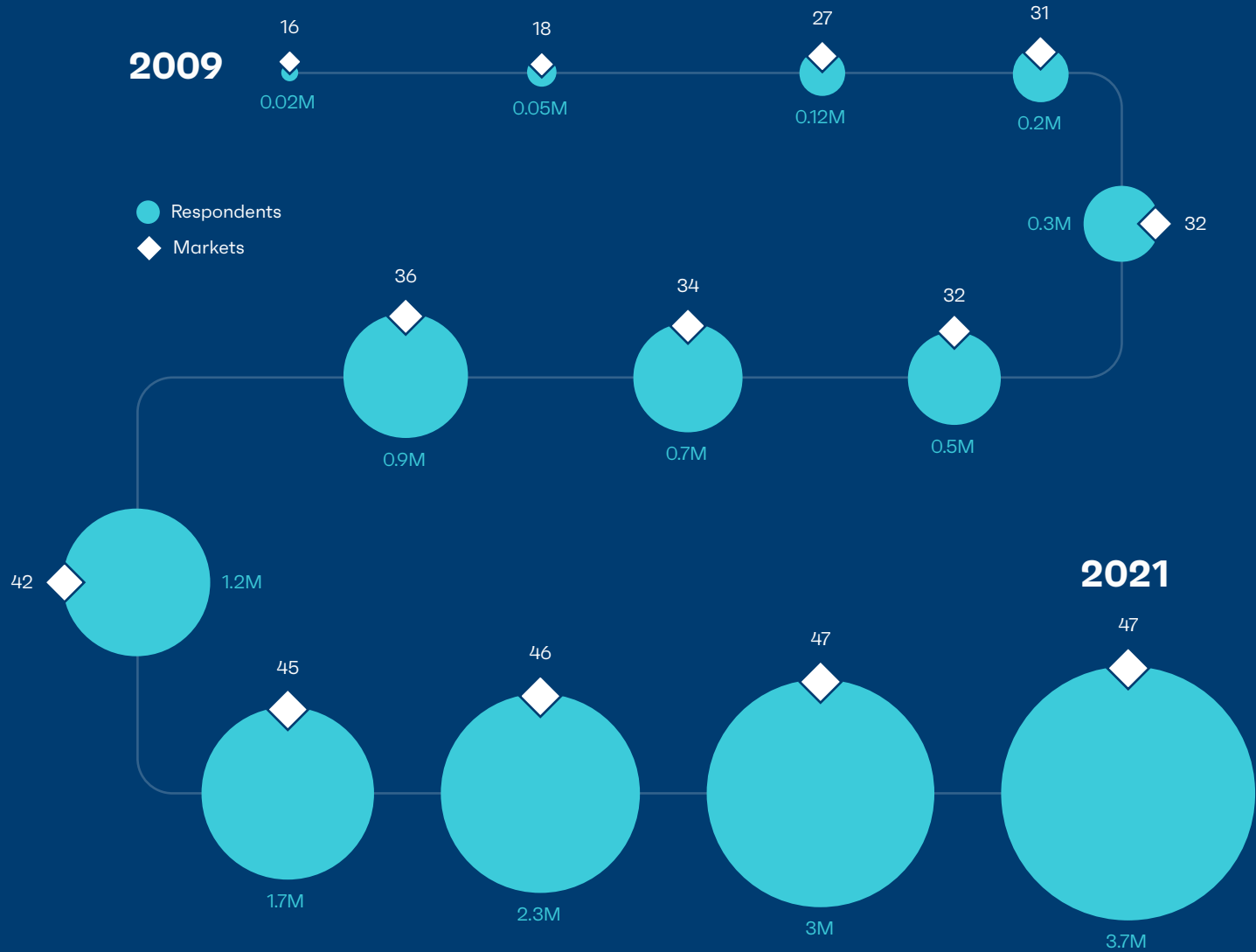
Over time, our country coverage has increased. Beginning with 16 markets in 2009, we were running our harmonized study in 36 countries by the end of 2016. We incorporated 6 new markets in 2017 and 5 more between 2018 and 2020, bringing our total to 47.

Covering 47 markets

Argentina	Indonesia	Russia
Australia	Ireland	Saudi Arabia
Austria	Israel	Singapore
Belgium	Italy	South Africa
Brazil	Japan	South Korea
Canada	Kenya	Spain
China	Malaysia	Sweden
Colombia	Mexico	Switzerland
Denmark	Morocco	Taiwan
Egypt	Netherlands	Thailand
France	New Zealand	Turkey
Germany	Nigeria	UAE
Ghana	Philippines	UK
Greece	Poland	USA
Hong Kong	Portugal	Vietnam
India	Romania	

We offer a co-launch option for new markets. For more information please contact your account manager

Cumulative response count

- Respondents
- Markets

2009
16 — 0.02M
18 — 0.05M
27 — 0.12M
31 — 0.2M
32 — 0.3M
36 — 0.9M
34 — 0.7M
32 — 0.5M
42 — 1.2M
45 — 1.7M
46 — 2.3M
47 — 3M
2021
47 — 3.7M

Mobile surveys

In 2017, we launched a mobile version of our Core study containing a selection of questions from the full Core study in a format optimised for mobile. This has helped us expand our Core study globally, especially in Africa, where most internet users are mobile-first (and where significant minorities might be mobile-only). The mobile survey is run alongside the full version on other devices, with the results of both being merged together and published as one dataset. In Ghana, Kenya, Morocco and Nigeria, we only run the mobile version of the survey.

We run a mobile version of our Core survey to ensure we're capturing mobile-first respondents

Add-Ons

Since 2019, we have launched a number of studies which use GWI Core as their foundation but explore a particular subject area in greater depth. The first of these add-ons was GWI Work, which was launched in 2019. This was followed by GWI Zeitgeist in 2020, and GWI Gaming and GWI Sports in 2021.

For each add-on, we invite eligible respondents from the Core sample to take part in an additional survey. Those who respond and qualify go on to answer a series of questions about their work life, current trends, gaming or sports depending on which study they are participating in.

Because these respondents have also completed the Core survey, datapoints from each add-on can be compared with those from our Core study. This approach allows us to provide a detailed view of the behaviors and attitudes of internet users within a particular category, as well as shedding light on how these behaviors and attitudes intersect with their broader online profile.

GWI Core

GWI Work (2019)

GWI Zeitgeist (2020)

GWI Gaming (2021)

GWI Sports (2021)

Annual sample size

EMEA

EMEA	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
UK	2,300	4,000	6,000	4,000	25,000	30,000	30,000	30,000	30,000	33,000	40,000	40,000	40,000
France	1,000	2,000	3,000	2,000	4,000	4,000	8,000	8,000	9,000	15,000	20,000	20,000	20,000
Germany	1,000	2,000	3,000	2,000	4,000	4,000	8,000	8,000	9,000	13,000	20,000	20,000	20,000
Italy	1,000	2,000	3,000	2,000	4,000	4,000	8,000	8,000	9,000	13,000	20,000	20,000	20,000
Netherlands	750	1,500	2,300	1,500	3,000	3,000	3,000	3,000	5,000	5,000	5,000	5,000	5,000
Russia	750	1,500	2,800	2,500	5,000	5,000	5,000	5,000	9,000	9,000	11,000	14,000	17,000
Spain	1,000	2,000	3,000	2,000	4,000	4,000	8,000	8,000	9,000	13,000	20,000	20,000	20,000
Poland	–	750	2,300	1,500	3,000	3,000	3,000	3,000	5,000	7,000	7,000	8,000	8,000
Sweden	–	–	1,500	1,500	3,000	3,000	3,000	3,000	5,000	5,000	5,000	7,000	10,000
Turkey	–	–	1,500	1,500	3,000	3,000	3,000	3,000	6,000	6,000	7,000	8,000	8,000
Ireland	–	–	–	–	2,000	4,000	4,000	4,000	5,000	5,000	5,000	5,000	5,000
Belgium	–	–	–	–	–	–	2,000	3,000	5,000	5,000	5,000	5,000	5,000
Portugal	–	–	–	–	–	–	2,000	3,000	5,000	5,000	5,000	5,000	5,000
Austria	–	–	–	–	–	–	–	–	1,000	5,000	5,000	5,000	5,000
Switzerland	–	–	–	–	–	–	–	–	1,000	5,000	5,000	5,000	6,000
Denmark	–	–	–	–	–	–	–	–	–	3,000	5,000	5,000	6,000
Romania	–	–	–	–	–	–	–	–	–	1,000	5,000	5,000	5,000
Greece	–	–	–	–	–	–	–	–	–	–	–	–	5,000

Americas

Americas	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
USA	2,000	4,000	6,000	4,000	24,500	30,000	30,000	30,000	63,000	72,000	100,000	100,000	100,000
Mexico	750	1,500	2,000	1,500	3,000	3,000	3,000	3,000	6,000	10,000	12,000	17,000	17,000
Canada	1,000	2,000	3,000	2,000	4,000	4,000	4,000	6,000	9,000	9,000	11,000	19,000	19,000
Brazil	750	1,500	2,500	2,000	4,000	4,000	4,000	4,000	9,000	9,000	12,000	22,000	22,000
Argentina	–	–	1,500	1,500	3,000	3,000	3,000	3,000	6,000	6,000	6,000	6,000	6,000
Colombia	–	–	–	–	–	–	–	–	–	4,000	5,000	7,000	10,000

MEA

MEA	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Saudi Arabia	–	–	1,500	1,500	3,000	3,000	3,000	3,000	5,000	5,000	6,000	6,000	6,000
South Africa	–	–	1,500	1,500	3,000	3,000	3,000	3,000	6,000	6,000	6,000	6,000	6,000
UAE	–	–	–	1,500	3,000	3,000	3,000	3,000	5,000	7,000	7,000	7,000	7,000
Egypt	–	–	–	–	–	–	–	750	5,000	7,000	7,000	7,000	7,000
Ghana	–	–	–	–	–	–	–	–	3,000	4,000	4,000	4,000	4,000
Kenya	–	–	–	–	–	–	–	–	3,000	4,000	4,000	4,000	4,000
Morocco	–	–	–	–	–	–	–	–	3,000	4,000	4,000	4,000	4,000
Nigeria	–	–	–	–	–	–	–	–	3,000	4,000	4,000	4,000	4,000
Israel	–	–	–	–	–	–	–	–	–	4,000	2,500	5,000	6,000

APAC

APAC	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Australia	750	1,500	2,000	1,500	3,000	3,000	3,000	3,000	5,000	10,000	1,600	16,000	17,000
China	1,000	2,000	4,000	4,000	8,000	8,000	13,000	22,000	43,000	61,000	70,000	96,000	96,000
India	750	1,500	2,500	2,500	5,000	5,000	5,000	6,000	12,000	20,000	35,000	54,000	54,000
Japan	1,000	1,500	2,300	1,500	3,000	3,000	3,000	4,000	7,000	7,000	8,000	14,000	20,000
South Korea	750	1,500	2,300	1,500	3,000	3,000	3,000	3,000	5,000	5,000	5,000	6,000	8,000
Malaysia	–	750	2,300	1,500	3,000	3,000	3,000	3,000	6,000	6,000	6,000	10,000	15,000
Hong Kong	–	–	2,300	1,500	3,000	3,000	3,000	3,000	5,000	7,000	7,000	7,000	7,000
Indonesia	–	–	2,300	1,500	3,000	3,000	3,000	3,000	7,000	7,000	10,000	20,000	20,000
Philippines	–	–	2,300	1,500	3,000	3,000	3,000	3,000	6,000	6,000	8,000	12,000	12,000
Singapore	–	–	2,300	1,500	3,000	3,000	3,000	3,000	6,000	10,000	10,000	11,000	13,000
Taiwan	–	–	–	1,500	3,000	3,000	3,000	3,000	5,000	7,000	8,000	9,000	9,000
Thailand	–	–	–	1,500	3,000	3,000	3,000	3,000	6,000	6,000	10,000	15,000	15,000
Vietnam	–	–	–	1,500	3,000	3,000	3,000	3,000	6,000	6,000	8,000	10,000	10,000
New Zealand	–	–	–	–	–	–	–	750	5,000	5,000	5,000	5,000	5,000

Sample size by quarter

Market	
Argentina	1,500
Australia	4,250
Austria	1,250
Belgium	1,250
Brazil	5,500
Canada	4,750
China	24,000
Colombia	2,500
Denmark	1,500
Egypt	2,000
France	5,000
Germany	5,000
Ghana	1,000
Greece	1,250
Hong Kong	1,750
India	13,500
Indonesia	5,000
Ireland	1,250
Israel	1,500
Italy	5,000
Japan	5,000
Kenya	1,000
Malaysia	3,750
Mexico	4,250

Market	
Morocco	1,000
Netherlands	1,250
New Zealand	1,250
Nigeria	1,000
Philippines	3,000
Poland	2,000
Portugal	1,250
Romania	1,250
Russia	4,250
Saudi Arabia	1,500
Singapore	3,250
South Africa	1,500
South Korea	2,000
Spain	5,000
Sweden	2,500
Switzerland	1,500
Taiwan	2,250
Thailand	3,750
Turkey	2000
UAE	1,750
UK	10,000
USA	25,000
Vietnam	2,500

We work with a number of industry-leading panel providers to interview a diverse range of high-quality respondents

Our respondents

To interview internet users at such a vast scale, we work with a number of industry-leading panel providers across our Core markets. These providers manage the relationships with respondents on their respective panels, from the initial recruitment process through to the distribution of invitations to take part in our surveys. In some countries, these partners will also engage further panels to help fulfil our sample needs; practically, that means our respondents are typically sourced from between 2-5 panels in the majority of markets.

Although each provider will have its own systems in place, they will typically invite people to sign up to their panels via online ads, sponsored posts, online messaging and partnerships with sites. Anyone who expresses an interest will then undergo a joining process, which involves verification of their email address and submission of basic demographic information.

Each time we launch fieldwork, we supply our panel partners with demographic information about the respondents we require in order for our sample to be representative. This involves instructing them on the number of female and male respondents, the number from each age group, the proportion with secondary vs tertiary education, and so on.

Incentives

Our panel partners offer a variety of incentives to respondents to take part, which can include:

- ☑ Monetary payments/PayPal credit
- ☑ Loyalty points
- ☑ Vouchers
- ☑ Charity donations
- ☑ Competition/sweepstake entry

These incentives are designed to appeal to respondents of all backgrounds, including wealthier segments who might be most motivated by the chance to help good causes. The value of incentives will vary between markets, and sometimes between demographics within a particular country.

Sample structure

There are two key points to note about the sample structure for our Core study.

We represent 16-64 year-olds

We don't interview anyone aged 15 or under for our Core study because parental consent would be needed. In addition, questions would need to be asked in a way which was suitable for younger respondents. However, we do run a separate study, GWI Kids, which looks specifically at internet users aged 8-15.

We don't interview people aged 65+ because it's very challenging to find enough people in this age bracket in some markets – particularly emerging markets where internet penetration rates are low and online populations are therefore dominated by younger age groups. As we want our Core study to be representative and harmonized across markets, we therefore set an upper age limit.

We represent online populations

Internet penetration rates vary significantly around the world, from highs of 90%+ in parts of Europe and North America to lows of around 40% in parts of Africa and Asia. Because of this, the demographic composition of the online population may look very different from one market to the next; this will be reflected in our sample structure.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks.

Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. In some Middle Eastern, African and Asian countries, we would also expect a gender-based skew towards males.

Internet penetration estimates

Country	%		Country	%
Argentina	83%		Morocco	74%
Australia	91%		Netherlands	96%
Austria	91%		New Zealand	94%
Belgium	92%		Nigeria	51%
Brazil	77%		Philippines	68%
Canada	95%		Poland	83%
China	66%		Portugal	79%
Colombia	69%		Romania	78%
Denmark	98%		Russia	89%
Egypt	59%		Saudi Arabia	93%
France	87%		Singapore	91%
Germany	93%		South Africa	64%
Ghana	51%		South Korea	98%
Greece	80%		Spain	93%
Hong Kong	93%		Sweden	96%
India	47%		Switzerland	96%
Indonesia	49%		Taiwan	91%
Ireland	88%		Thailand	63%
Israel	90%		Turkey	80%
Italy	79%		UAE	99%
Japan	94%		UK	97%
Kenya	42%		USA	92%
Malaysia	86%		Vietnam	73%
Mexico	74%			

The above forecast is based on ITU data from 2018 and 2019. Note that these figures are for the total population whereas our Core research is conducted among 16-64s, among whom the internet penetration rate will be higher.

Quotas

To ensure that our Core sample is representative of each country's online population aged 16-64, we set quotas on age, gender and education. To set these, we conduct thorough research across a range of international and national sources.

At a global level, these include the World Bank, the International Labour Organization, the CIA Factbook and the US Bureau of Labor Statistics; within individual markets, we are typically taking data from national statistics sources, government departments, Eurostat or other credible and robust third-party sources.

In the UAE, we also set quotas on nationality. Meanwhile, in the USA, we set quotas on age, gender, income, region, race and ethnicity. This is to align Core with our GWI USA study, which uses a broader range of quotas. In an ideal world, we would use this system across all Core markets. However, such information about a country's online population is not always readily available.

In the remainder of our Core markets, education is used as a proxy for income. When combined with our age and gender quotas, this provides an accurate view of the composition of the online population, with other key demographics (such as region) falling out naturally.

We set quotas on age, gender and education to ensure our research is representative of each country's online population aged 16-64

Universe size

To explain how we calculate the universe size for each of our Core markets, we can look at the UK as an example. The UN estimates there are 42.48 million people aged 15-64 in the UK. Here you can see this figure broken down by age group, and with the total number of 15 year olds removed ▶

	16-24	25-34	35-44	45-54	55-64
Male	4,104,493	4,480,042	4,242,949	4,608,987	3,748,797
Female	3,932,052	4,473,329	4,290,538	4,739,536	3,860,385

Using data from the Office for National Statistics, we can then find the percentage of each these groups who use the internet (via any device) ▶

	16-24	25-34	35-44	45-54	55-64
Male	100%	100%	100%	99%	99%
Female	100%	100%	100%	99%	99%

By multiplying these two datasets together, we know that over 99% of 16-64s in the UK are internet users. This equates to 42.31m people.

Weighting

After each wave of fieldwork, we then assign a "weight" to every respondent based on their age, gender and education profile. This allows us to calculate approximately how many people are represented by their responses, and to forecast overall audience sizes accordingly.

For example, we might know that a response from a young male aged 16-24 represents 8,000 similar individuals in their market. So, each time that respondent answers positively to a question, the corresponding audience size for that question is increased by 8,000.

*In Saudi Arabia and the USA, we use additional weighting criteria, such as nationality, race and ethnicity. For more information on this, please contact your account manager.

Number of internet users represented by a GWI Core respondent (000s)

Country		Country	
Argentina	17	Morocco	16
Australia	4	Netherlands	9
Austria	4	New Zealand	2
Belgium	6	Nigeria	66
Brazil	23	Philippines	17
Canada	5	Poland	11
China	28	Portugal	5
Colombia	11	Romania	9
Denmark	2	Russia	25
Egypt	19	Saudi Arabia*	11
France	8	Singapore	1
Germany	10	South Africa	20
Ghana	10	South Korea	18
Greece	5	Spain	6
Hong Kong	3	Sweden	2
India	26	Switzerland	4
Indonesia	23	Taiwan	7
Ireland	2	Thailand	9
Israel	3	Turkey	23
Italy	7	UAE	3
Japan	14	UK	4
Kenya	20	USA*	8
Malaysia	7	Vietnam	19
Mexico	16		

In addition to a wide range of global brands, we compile tailored lists of local brands for each country

Localization

We place a strong emphasis on ensuring the content of our surveys is consistent across all of the markets we cover. However, there are some cultural and legal exceptions to this:

☑ We do not ask under-18s (or under-21s in the US) about alcohol. There are also age-restrictions relating to behaviors such as gambling.

☑ In Middle Eastern countries, some options are localized in line with prevailing cultural customs. Examples of this include asking if someone is living with their spouse rather than their partner, or whether they are engaged rather than in a relationship. We also do not ask about pregnancy in the Saudi Arabia, Egypt or the UAE.

☑ We only ask about sexual orientation in Australia, New Zealand, North America and in a select number of Western European markets.

☑ In most brand questions, respondents are asked about their engagement with a number of local brands in addition to the global ones asked in all markets.

☑ Respondents see locally appropriate education stages, based on levels specified in the International Standard Classification of Education (ISCED).

☑ Respondents are asked to select monetary values in their own local unit of currency.

We also employ routing to ensure that respondents are not asked questions which would be irrelevant to them. For example, if someone says they do not use any social networks, then they are not asked follow-up questions about this behavior.

The survey itself is divided into thematic "blocks" of questions. These blocks are rotated on a random basis to ensure sections do not always appear in the same position within the survey.

Survey language

All respondents complete the survey in their local language. In most countries we offer one language only but, as per the table below, there are two or three languages available in the following markets: Austria, Belgium, Canada, Egypt, Israel, Malaysia, Morocco, Saudi Arabia, Switzerland, UAE and USA.

To ensure that all text is translated accurately – and with appropriate digital context – we work with an expert translation company. Each quarter, any changes/additions are sent to this company, which then employs local and digitally savvy translators in order to update the survey.

	First language	Second/third language
Argentina	Latin American Spanish	
Australia	American English	
Austria	Austrian German	
Belgium	Flemish	Belgian French
Brazil	Brazilian Portuguese	
Canada	American English	Canadian French
China	Mandarin	
Colombia	Latin American Spanish	
Denmark	Danish	
Egypt	American English	Arabic
France	French	
Germany	German	
Ghana	American English	
Greece	Greek	
Hong Kong	American English	Cantonese
India	American English	Hindi
Indonesia	Indonesian	
Ireland	American English	
Israel	Arabic	Hebrew
Italy	Italian	
Japan	Japanese	
Kenya	American English	
Malaysia	American English	Malay
Mexico	Latin American Spanish	

	First language	Second/third language
Morocco	Arabic	French
Netherlands	Dutch	
New Zealand	American English	
Nigeria	American English	
Philippines	American English	Tagalog
Poland	Polish	
Portugal	Portuguese	
Romania	Romanian	
Russia	Russian	
Saudi Arabia	American English	Arabic
Singapore	American English	
South Africa	American English	
South Korea	Korean	
Spain	Spanish	
Sweden	Swedish	
Switzerland	French	German	Italian
Taiwan	Taiwanese Mandarin Chinese	
Thailand	Thai	
Turkey	Turkish	
UAE	American English	Arabic
UK	American English	
USA	American English	Spanish
Vietnam	Vietnamese	

Data checks

Before completing one of our surveys, all panelists will have undergone quality checks conducted by their panel. However, we also run stringent testing both during and after fieldwork to ensure a high-quality and robust sample.

These include:

✅ Checking completion time

By running high volumes of automatic "test" respondents through the survey, we know approximately how long it should take the "average" person to complete (information which is supplemented by the knowledge we have gained from running similar surveys in previous quarters). Based on this, we have a minimum completion time – if anyone finishes more quickly than this, they are removed.

✅ Detecting patterned answers

If a respondent starts answering questions in a certain way, we will review their answers across the survey and, if they appear to be suspicious, we will remove them.

✅ Removing straight-liners

Within our survey, we have a number of "grid" or "list" style questions which invite people to enter a level of agreement across a number of different categories. If someone answers in a uniform fashion throughout a list or grid, they will be flagged as a potential "straight-liner" – someone who might not be answering accurately. If someone does this on just one question in isolation, we will review their answer to see if this response pattern could be plausible or logical (for example, it could be the case that someone genuinely has not used any services within a particular.

✅ Detecting multiple "None of the above" answers

In line with standard research practice, most behavioral questions (e.g. "Have you done the following?") will include a "none of the above" option at the end. We will monitor how frequently a respondent is selecting this option and remove them if we deem their "none of the above" responses to be excessively high.

✅ Logic traps

Our survey contains a number of "logic traps" where poor-quality respondents could contradict themselves. An example of this might be a respondent who says their child's age is too high to be compatible with their own. Respondents who fail the logic traps are removed.

✅ 2x Rule

When undertaking our analysis, respondents who are identified as being potentially suspicious on two or more of the criteria outlined above are automatically removed without any further consideration.
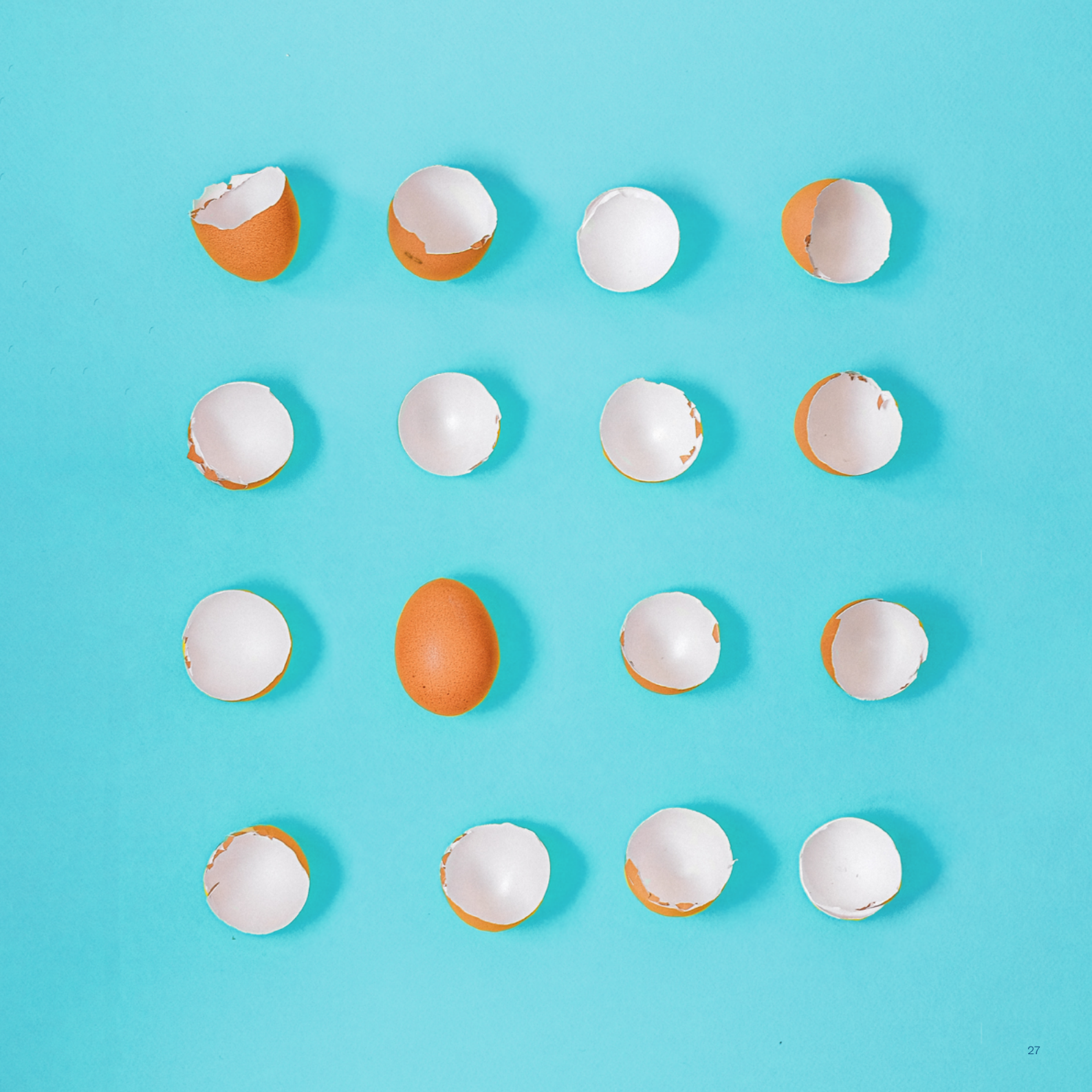
Re-contact

Our Re-contact methodology allows us to interview GWI Core respondents again providing two significant benefits:

✔ We can pre-target even difficult to reach audiences based on 40,000 game profiling data points

✔ We can synchronize the Custom and GWI Core datasets to allow a user access to a huge amount of data

For example, a client wants to Re-contact gamers from our GWI Core panel so they can better understand the role gaming plays in their life. Utilizing both datasets they can understand what motivates them to game (Re-contact) as well as which titles they engage with and how long they spend gaming (GWI Core).

Measuring digital Impact

Our digital capabilities have all of the benefits of active and passive data collection. Tagged online content allows us to measure the impact of digital advertising and website visits.

✔ Measure the effectiveness of online campaigns

✔ Incorporate Opportunity To See (OTS) modelling for cross platform campaigns

✔ Evaluate online campaign targeting using 40,000 data points from our GWI Core study

✔ Understand the profile of a website's visitation audience with the same data points

GWI.