TOP10VPN | globalwebindex

# Global VPN Usage Report 2020

An exploration of VPNs and
their users around the world

CO-BRANDED REPORT 2020

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# Foreword

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Over the last decade, Virtual Private Networks (VPN) evolved from a niche tool for privacy obsessives to become an increasingly essential consumer product, used by all types of people around the world.

In 2020 the popularity of consumer VPNs continues to grow, and this once-obscure piece of software is now on the verge of becoming a mainstream internet security tool.

However, the motivations for using VPNs are highly diverse. While internet shutdowns and censorship have been the catalyst for recent surges in VPN use in authoritarian countries, more democratic nations have seen a sharp increase in VPN adoption for a multitude of different reasons.

To explore these trends and create the most comprehensive study on the state of VPNs in 2020, Top10VPN.com partnered with GlobalWebIndex to produce the first Global VPN Usage Report. This one of a kind study is rich with new findings and statistics about VPNs and the people who use them.

The Global VPN Usage Report 2020 puts the world of VPNs under the microscope, presenting data from 42 countries - with a special focus on the U.S. and UK, to really shine a light on what makes these two mature markets tick.

# Key findings

## 01

31% of internet users worldwide use a Virtual Private Network (VPN).

## 02

72% of U.S. and UK VPN users opt for free services; 36% pay to use theirs.

## 03

Indonesia (61%) and India (45%) are the biggest markets for VPN usage, though the biggest growth since 2017 has come from mature markets like Australia (69% growth) and the Netherlands (76% growth).

## 04

In the U.S. and UK, secure browsing is VPNs' biggest draw, above accessing entertainment or restricted sites.

## 05

While a need for privacy dictates VPN adoption, the tools themselves sometimes escape the same scrutiny. Users look at speed and quality of connection when shopping for VPNs before they look at privacy policies.
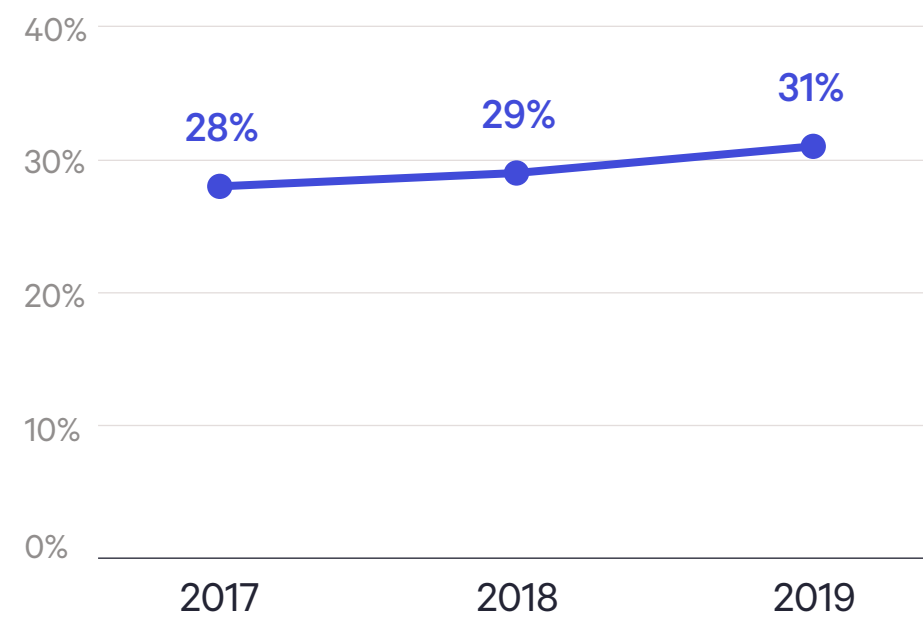
# VPN usage by region

VPNs, seen by some as a niche tool, have become a well-established part of the online landscape. 31% of internet users browse with the help of VPNs, and the figure has been steadily growing since 2017.

As with many digital services, VPN usage comes out highest in the fast-growth regions of Asia Pacific and the Middle East and Africa. There are two main reasons for this. One is that internet users in those regions skew younger, more urban, and affluent relative to the average population. This means they tend to be more comfortable with digital tools.

The second is cultural; in those regions there is often more justification to use a VPN, either to access bigger content libraries in other countries, or to safeguard internet activity from repressive governments. By breaking the data down further to look at each individual country, we can fill in the picture even more.
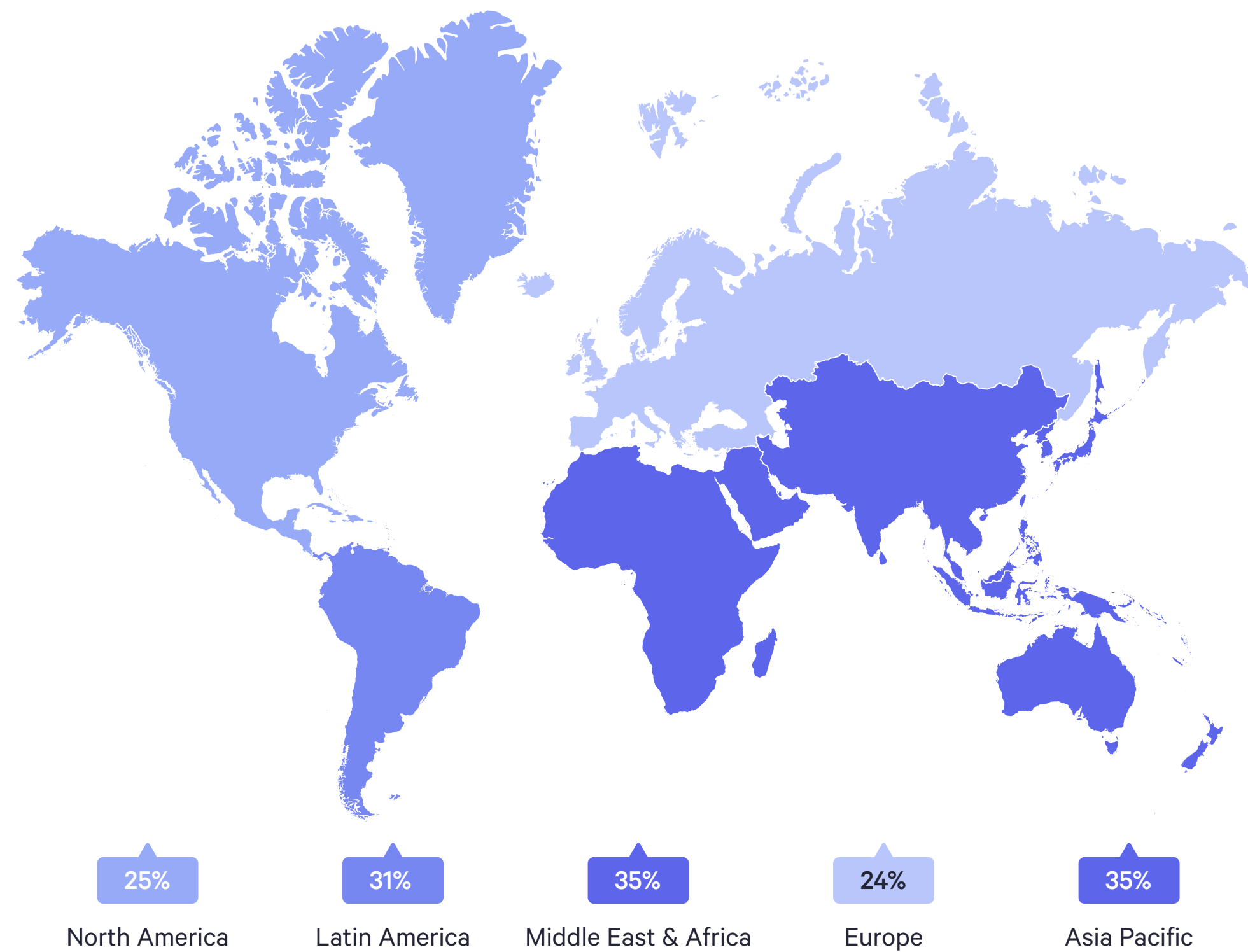
**VPN USAGE IS GROWING STEADILY**

% of global internet users aged 16-64 who have used a VPN in the past month



**VPN USAGE BY REGION**

% of internet users in each region who have used a VPN in the past month



| 25% | 31% | 35% | 24% | 35% |
|-----|-----|-----|-----|-----|
| North America | Latin America | Middle East & Africa | Europe | Asia Pacific |

**Question:** In the last month, which of these have you done? (Used a Virtual Private Network (VPN) or Proxy server) **Source:** GlobalWebIndex 2017-2019 (averages of waves conducted between Q2 2017-Q4 2019) **Base:** 230,610 (2017), 391,130 (2018), 493,256 (2019) internet users aged 16-64

**Question:** In the last month, which of these have you done? (Used a Virtual Private Network (VPN) or Proxy server) **Source:** GlobalWebIndex Q4 2019 **Base:** 142,017 internet users aged 16-64

# VPN usage by country

The countries where VPNs are used most have some of the most stringent online censorship laws. Of the top 10, Indonesia, India, Saudi Arabia, Turkey, Thailand and Vietnam score below 50 for their **Freedom on the Net** score, the metric created by independent watchdog Freedom House to rank countries for online restrictions and protections. India and Indonesia, the top two, are also two of the most prolific countries for internet shutdowns.

In tracing growth since 2017, you can see how state action on VPNs goes one of two ways. In **China**, **Egypt**, and **Turkey**, government crackdowns on VPNs have stemmed their growth. But in **Russia**, where similar laws have been passed, VPNs have had some of the biggest growth of any country.

Other countries showing impressive growth are those usually regarded as providing a good deal of digital freedom to their citizens. But the level of growth in countries like Australia and the Netherlands shows how recent

surveillance laws are compelling internet users in all parts of the world, not just those under repressive regimes, to use VPNs. In some countries protection from government surveillance may not be the number one priority, but there's still other parties users want to hide their browsing from, whether it's internet service providers, advertisers, or hackers.

As we'll see later, not all internet users deploy VPNs to protect their privacy online. But in looking at rates of VPN adoption against attitudes to online privacy, you get a sense of which countries they may take root in next. In South Korea, Hong Kong, Israel, and Spain, we see the biggest gap between concerns about data privacy and actual use of VPNs. By contrast, Indonesia is unique among our tracked markets in that more internet users there browse with VPNs than actually feel concerned about privacy, which is a testament to how ingrained VPN use is in the country.

## VPN USAGE BY COUNTRY

● % of internet users in each country who have used a VPN in the last month        ● % growth since Q2 2017*

*some markets added after Q2 2017

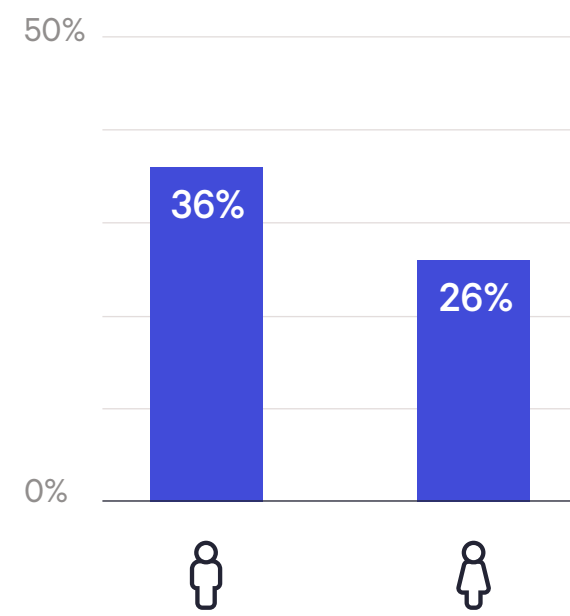| Country | % | Growth | | Country | % | Growth |
|---|---|---|---|---|---|---|
| Indonesia | 61% | 31% | | Sweden | 26% | 23% |
| India | 45% | 5% | | Taiwan | 25% | -4% |
| Saudi Arabia | 44% | 8% | | Australia | 25% | 69% |
| Malaysia | 43% | 16% | | U.S.A. | 25% | 42% |
| UAE | 42% | 22% | | Hong Kong | 24% | 13% |
| Philippines | 41% | 28% | | Spain | 24% | 39% |
| Turkey | 40% | -2% | | Belgium | 24% | 40% |
| South Africa | 37% | 16% | | Poland | 24% | 17% |
| Thailand | 36% | 17% | | Germany | 23% | 42% |
| Vietnam | 35% | 8% | | UK | 23% | 22% |
| Singapore | 34% | 34% | | Russia | 22% | 61% |
| Colombia | 33% | N/A | | Austria | 22% | N/A |
| Egypt | 32% | -6% | | Canada | 22% | 39% |
| Brazil | 31% | 0% | | Denmark | 22% | N/A |
| Mexico | 30% | 8% | | Netherlands | 22% | 76% |
| China | 29% | -6% | | New Zealand | 21% | 14% |
| Switzerland | 28% | N/A | | Italy | 21% | 27% |
| Argentina | 27% | 18% | | France | 20% | 47% |
| Portugal | 27% | 31% | | South Korea | 17% | 60% |
| Ireland | 27% | 37% | | Israel | 15% | N/A |
| Romania | 27% | N/A | | Japan | 9% | 62% |

**Question:** In the last month, which of these have you done? (Used a Virtual Private Network (VPN) or Proxy server) **Source:** GlobalWebIndex Q2 2017 & Q4 2019) **Base:** 72,529 (Q2 2017) & 142,017 (Q4 2019) internet users aged 16-64
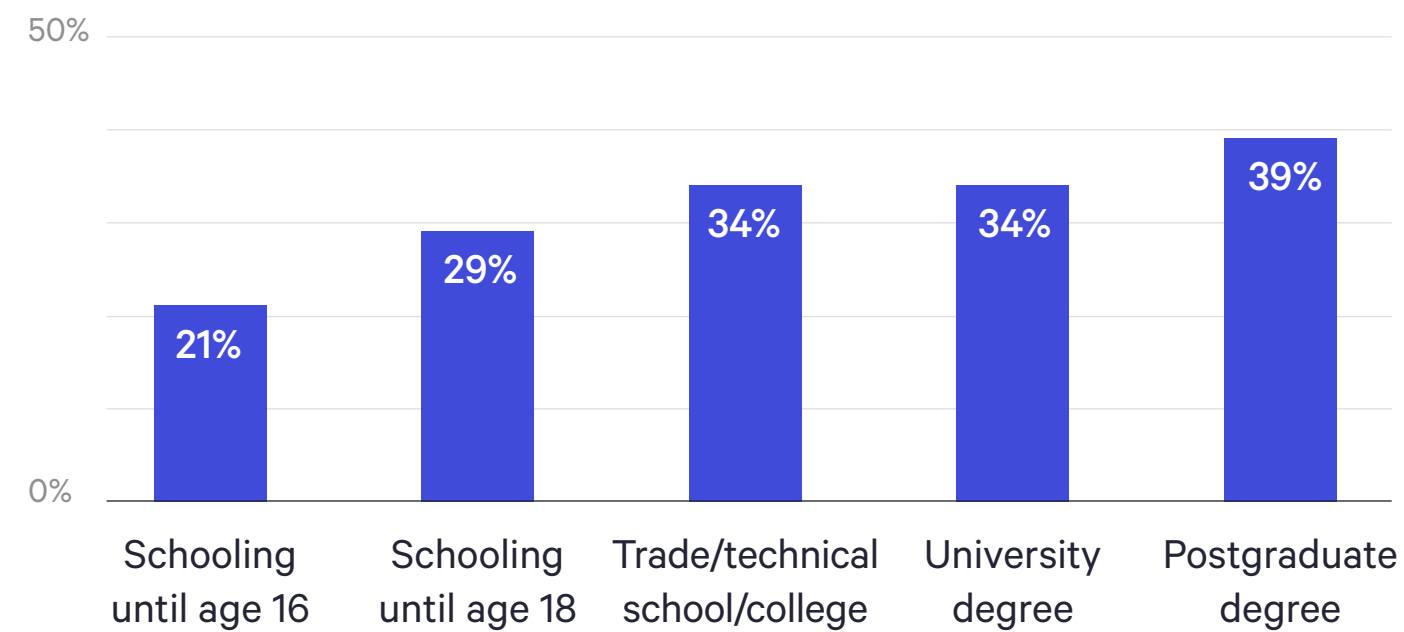
# Who are VPN users?

**DEMOGRAPHICS OF VPN USERS**
% of internet users in the following demographics who have used a VPN in the last month
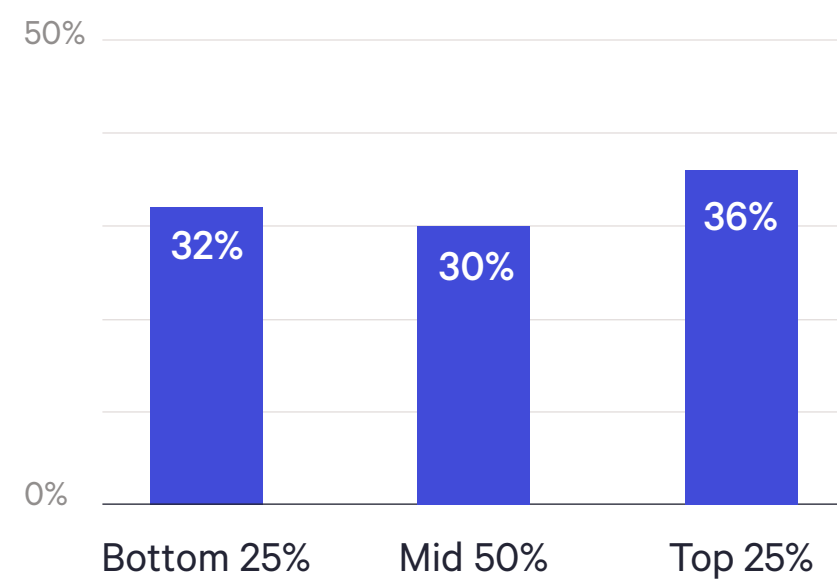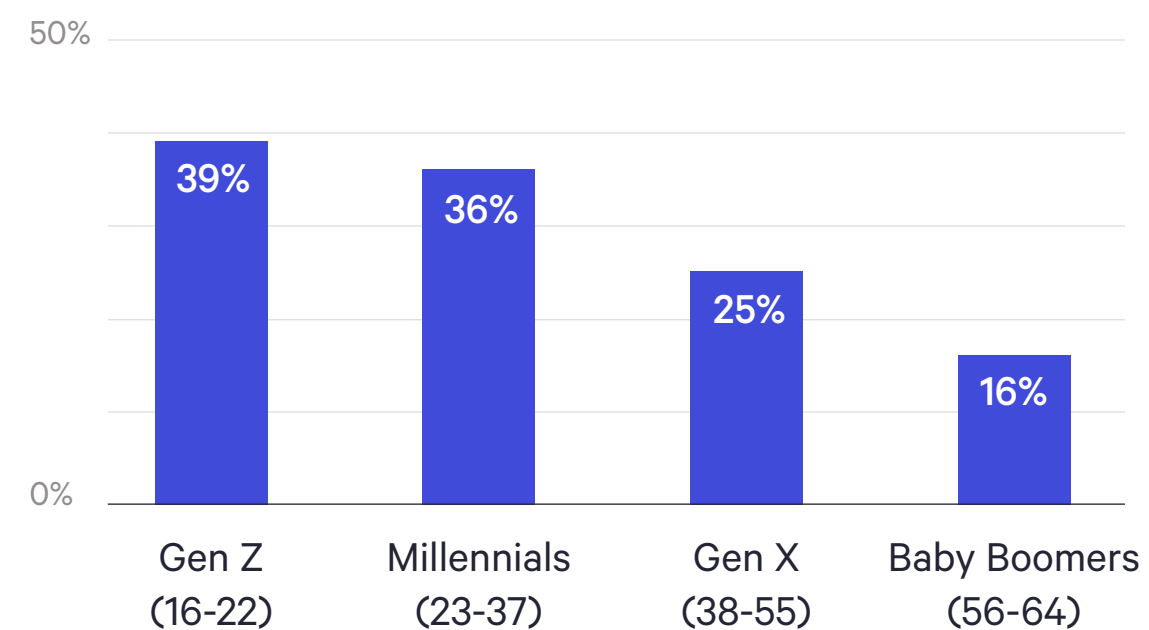
### Gender



| | |
|---|---|
| Male | 36% |
| Female | 26% |

### Education



| | |
|---|---|
| Schooling until age 16 | 21% |
| Schooling until age 18 | 29% |
| Trade/technical school/college | 34% |
| University degree | 34% |
| Postgraduate degree | 39% |

### Income



| | |
|---|---|
| Bottom 25% | 32% |
| Mid 50% | 30% |
| Top 25% | 36% |

### Generation



| | |
|---|---|
| Gen Z (16-22) | 39% |
| Millennials (23-37) | 36% |
| Gen X (38-55) | 25% |
| Baby Boomers (56-64) | 16% |

Pulling back to the global picture for a moment, we can define other demographic traits of VPN users, to build the picture of who exactly uses them.

Two findings jump out. First of all, VPN users skew male. This is in line with patterns we find elsewhere in our data. For all privacy activities we track (including using private browsing windows, deleting cookies, and blocking ads), men take the lead. Our research also shows men are more likely to be interested in technology or computers, and to say it's important for them to have the latest technological products – so a pronounced interest in tech is the likely cause. But even with that in mind, the number of internet users engaging with VPNs shows its user base is bigger than just technophiles.

VPN providers often trumpet how their features can protect browsing activity when traveling, so it would be easy to think that they're a tool used mostly by a globetrotting, affluent class. VPN users are more likely to go abroad, to stay in hotels, and to earn more – but not by much. VPN usage is relatively equal across income brackets.

VPNs are tools that cut across demographics. There are a few exceptions; VPN usage skews toward the more educated, and they're more popular with tech-savvy younger generations. But they are making more headway with older age groups. VPN usage has grown by 37% among baby boomers since Q2 2017.
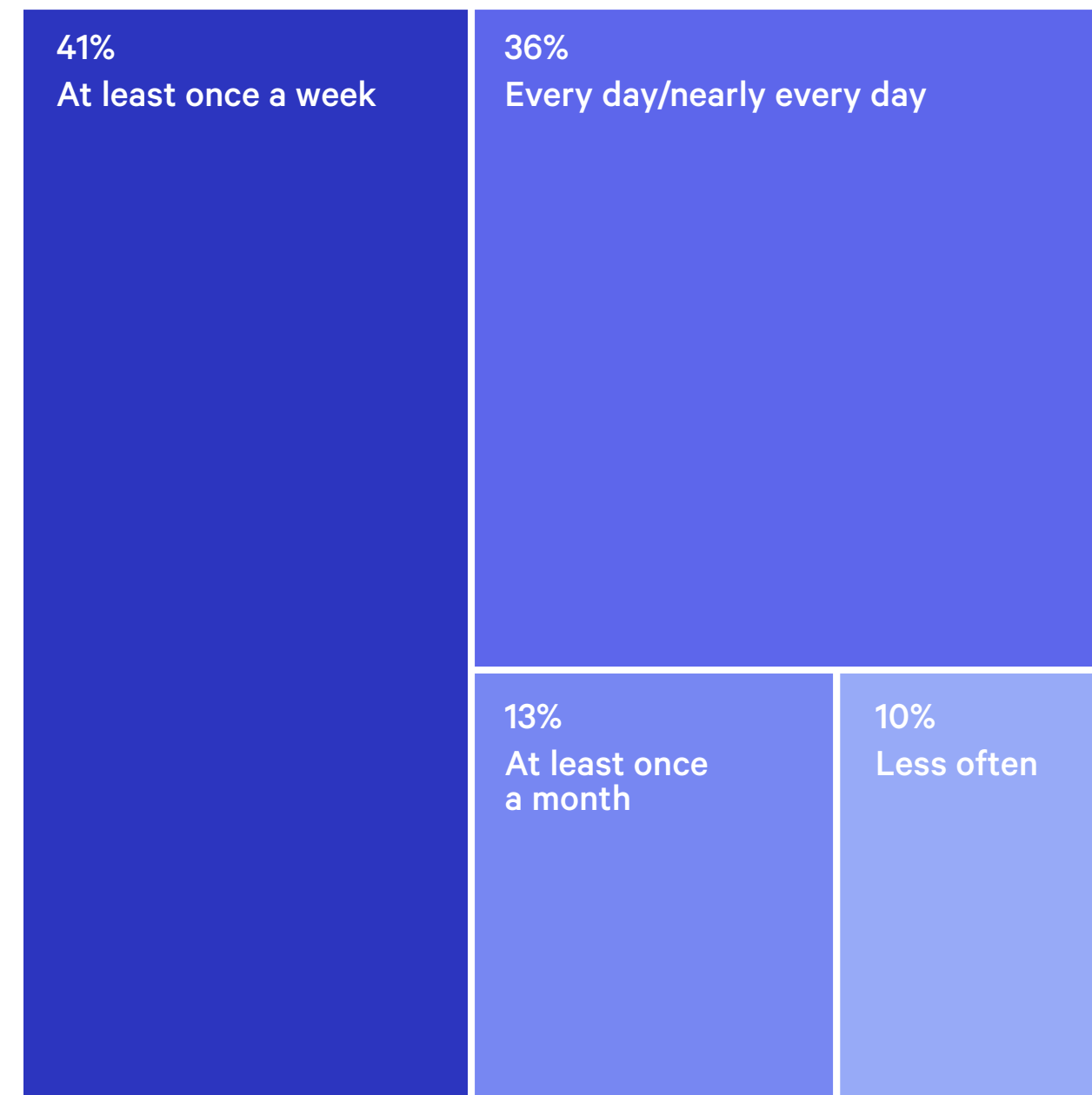
# Frequency

VPNs have become an essential layer of internet browsing for their users. When we focus on the U.S. and UK, the majority of users go online with a VPN either every day, or at least once a week. VPNs aren't used just for particular occasions, but are much more consistent within day-to-day, week-to-week browsing. On top of that, most users think they will use VPNs indefinitely, not putting a cap on future use when asked how long they plan to use them for. VPNs aren't used solely when more private browsing is preferred, or to unlock a restricted piece of content. They are more ubiquitous within their users' online lives.

We know from our Core research that in the U.S. and UK, smartphones are just as important to internet users as their PCs, and that has heralded broader changes in media consumption and other online habits. VPN use has followed suit. Mobile VPNs are in fact more popular (64%) than those on PC/laptop (62%) in those markets. The **Top10VPN. com report** on mobile VPN use demonstrates just how much VPN app downloads have increased year-on-year, and judging from our research, they have now reached parity with PC-based software. Router VPNs, which require more technical know-how to set up, are more niche (8%).
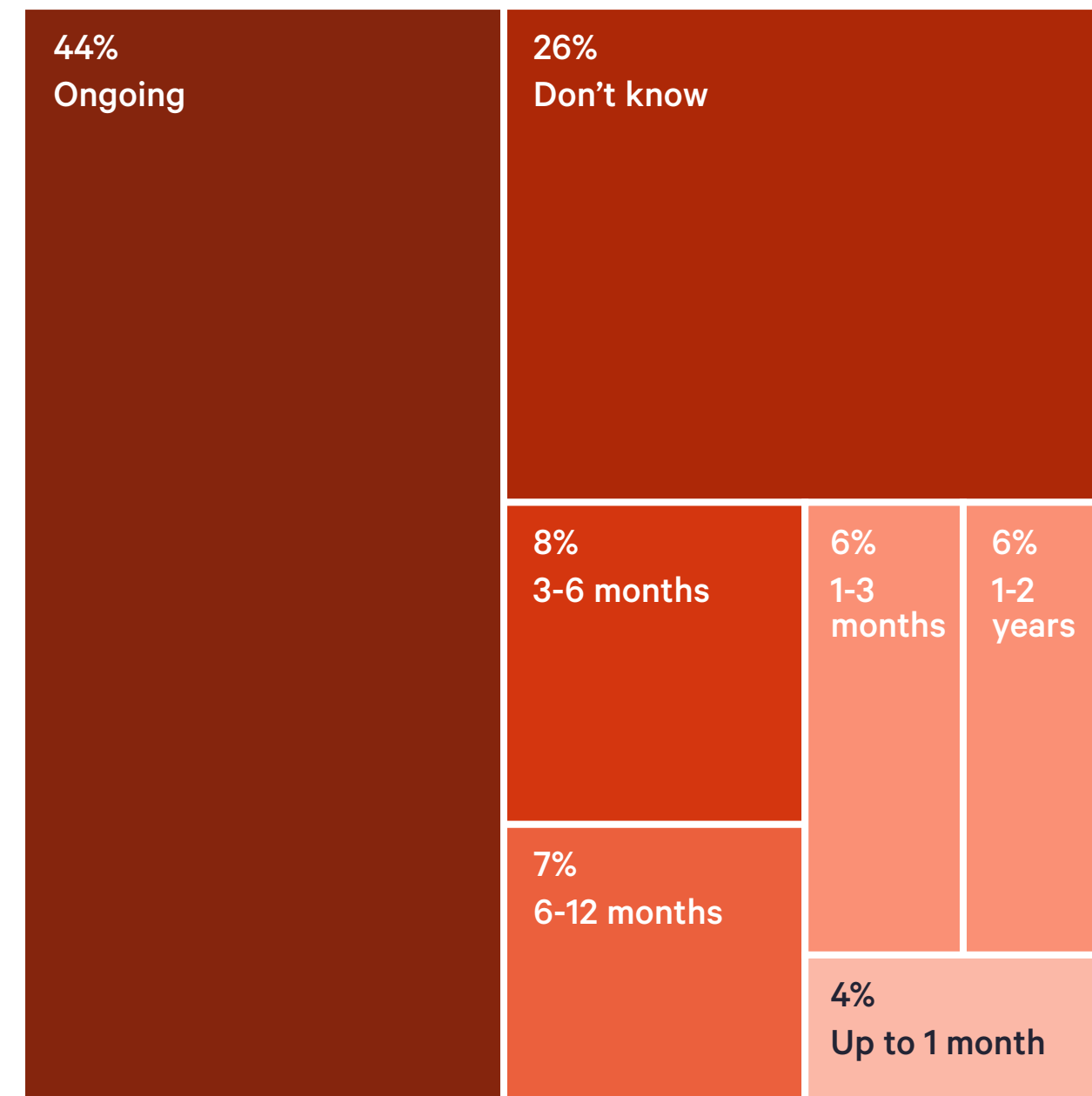
**FREQUENCY OF VPN USAGE**
% of U.S./UK VPN users who use them with the following frequency

**41%**
At least once a week

**36%**
Every day/nearly every day

**13%**
At least once a month

**10%**
Less often

**VPNs SET TO BE LIFELONG TOOLS**
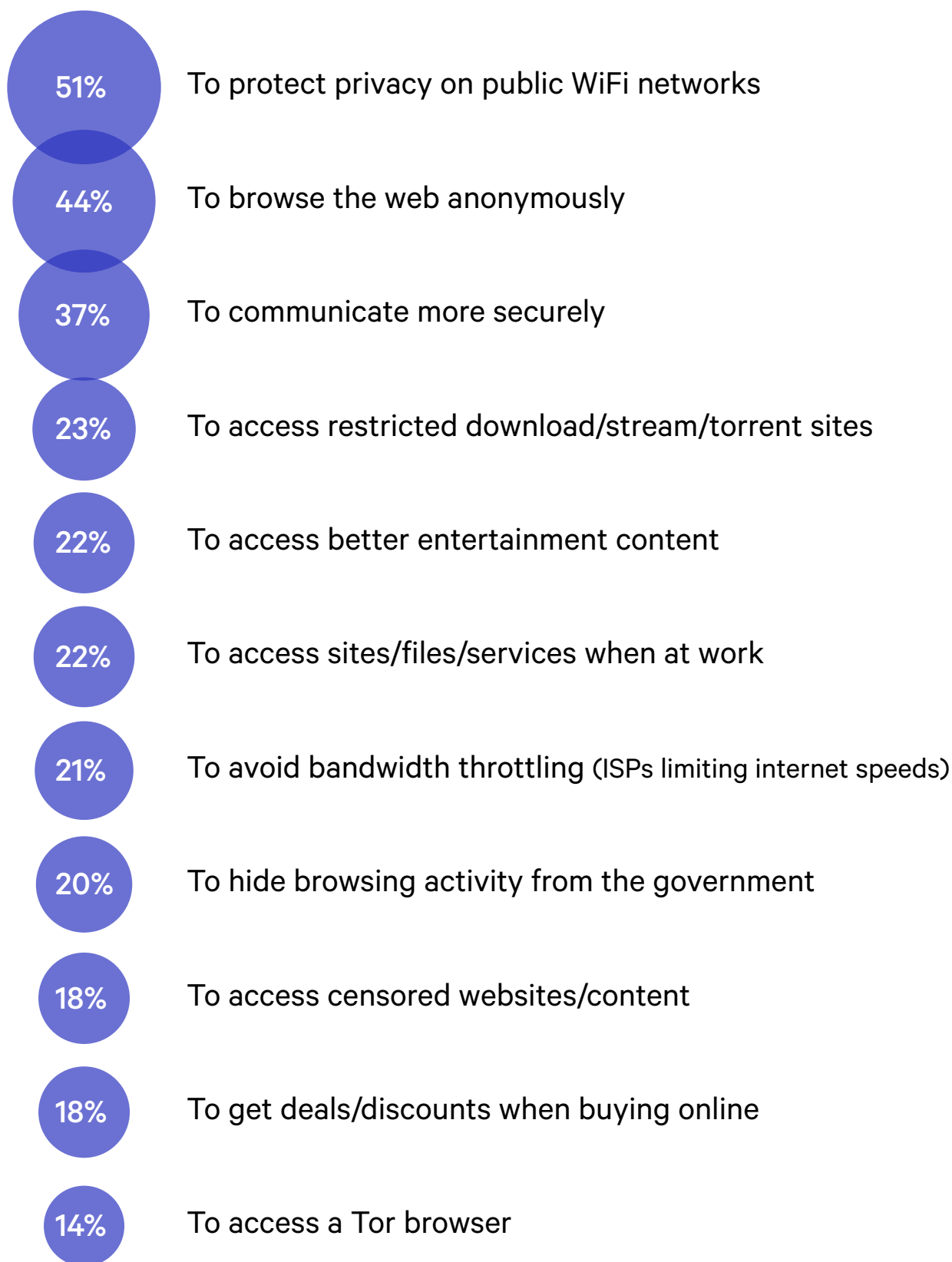% of U.S./UK VPN users who see themselves using VPNs for the following time periods

**44%**
Ongoing

**26%**
Don't know

**8%**
3-6 months

**6%**
1-3 months

**6%**
1-2 years

**7%**
6-12 months

**4%**
Up to 1 month

# Why do people use VPNs?

**WHY ARE VPNs USED?**

% of U.S./UK VPN users who use them for the following reasons

**51%** To protect privacy on public WiFi networks

**44%** To browse the web anonymously

**37%** To communicate more securely

**23%** To access restricted download/stream/torrent sites

**22%** To access better entertainment content

**22%** To access sites/files/services when at work

**21%** To avoid bandwidth throttling (ISPs limiting internet speeds)

**20%** To hide browsing activity from the government

**18%** To access censored websites/content

**18%** To get deals/discounts when buying online

**14%** To access a Tor browser

We've already established that 3 in 10 of internet users use VPNs. To fully understand the reasons behind why they're used, we can look to insights from our custom research on the topic in the U.S. and UK.

Within both markets, privacy concerns take priority over accessing entertainment. Even within the UK, where you might think envy of the more expansive U.S. entertainment market would play a role, it's desire to browse with protection that rules the day.

VPNs are most often used for protection in public WiFi networks specifically (51%), followed by a general wish to browse the web anonymously (44%), or to communicate more securely (37%). Accessing better entertainment content is important to 22% of VPN users, and 20% want to hide their browsing activity from the government.

As online entertainment platforms have grown and spread globally, VPNs have come to prominence for allowing users to access content libraries otherwise restricted to them. In January 2020, Justin Bieber went so far as to **share** instructions to his fans of how to use a VPN to spoof their location, and drive streaming figures of his latest single as a result.

And VPN users are more likely to use most of the well-known entertainment services*. Worldwide, they're 25% more likely to use Netflix, and 31% more likely to use Amazon Prime Video. On the music front, they're 35% more likely to use Spotify and 56% more likely to use Apple Music. But VPN users are also more likely to pay for every type of digital content we track, so it'd be unfair to think of them as pirates.

Accessing entertainment is not the priority in guiding internet users to use VPNs, and our research shows that much coverage of VPNs might put too much emphasis on it. Even Gen Zers in the U.S. and UK, who consume over two hours of online TV per day, and 82% of whom use Netflix, view VPNs as a privacy protection tool above all else.

But what's particularly intriguing is that the specific use-case of public WiFi networks comes above the more general wish to browse the web anonymously. This is despite the fact that VPNs are used much more at home (81%) than they are in public places.

This may be because perceived threats to online security are felt more emotionally than logically. It's possible that VPN users are quicker to make an association with public WiFi, and its perceived lack of security, with the need for protection, and they don't consider it in the context of their online footprint as a whole. This is something that has been **heavily promoted** by VPN providers in their TV advertising as well.

Research from the Media Effects Research Laboratory at Penn State University **throws some more light** on why this may be the case. Academics there ran an experiment where they analyzed participants' behavior in four types of location – a coffee shop, an Airbnb, a university, and their home. They then asked participants to answer a series of questions designed to elicit disclosure of sensitive information, such as whether they had watched pornographic material, or their level of comfort in disclosing financial information. The researchers identified that some participants had a higher "publicness heuristic", which lead

*Further data on specific streaming services can be found in the appendix.

them to perceive the coffee shop network as less secure than the university or home ones, and they disclosed less information about themselves as a result.

This "publicness heuristic" may also help explain our finding of public WiFi networks being the biggest drivers of VPN usage, even if data elsewhere doesn't seem to support that conclusion. It may be that, in places where internet users are surrounded by other people offline, they are quicker to associate said places with exposure online, and are more likely to think of VPNs.

In any case, it shows how internet users' thoughts around online security, exposure, and protection, often arise subconsciously.

## How internet users shop for VPNs

Even though VPN users view them as a line of defence for protecting privacy, the privacy policies of the tools themselves aren't the most important factor in deciding which VPN they use. 54% say the reliability of the connection is most important when choosing a VPN, along with its ease-of-use and speed (both 54%). There's a danger here that VPN users could be guided too much by marketing around connection speeds, when some VPNs have a poor record on actually protecting their users' information.

As Top10VPN.com has **covered**, many free VPN apps are fraught with security risk. Despite this, free VPNs are more popular than their paid-for counterparts. 72% use free VPNs, while 36% pay for theirs. Even for the highest earners, free VPNs are more popular than paid ones.

Tellingly, for those who use paid VPNs, but not free ones, data sharing with third parties is the most common reason (54%) to go for the paid-for option. Nevertheless, connection quality is still front-of-mind as a lack of performance restrictions comes in second place (47%). All this shows that VPNs are clearly not exempt from how most online services are marketed; advertising VPNs with high speeds and free pricing models tempts many users, even if it comes at the expense of not fully investigating privacy policies.

Even so, 62% of VPN users, when given a list of qualities they would choose to associate VPNs with, feel they are "secure", a more popular option than "useful" or "effective". There may be a knowledge gap here between how users discover VPNs, how they perceive them, and the reality of a market that includes some bad actors. VPN users may believe that all kinds of VPN are secure to the same degree, when research has shown this is not the case.

Remarkably, only 26% associated VPNs with the term "legal". It appears as if the vast majority of VPN users are unclear about their exact legal status, even in the U.S. and UK.

**FACTORS IN CHOOSING VPNS**

% of U.S./UK VPN users who say the following is important to them when choosing a VPN
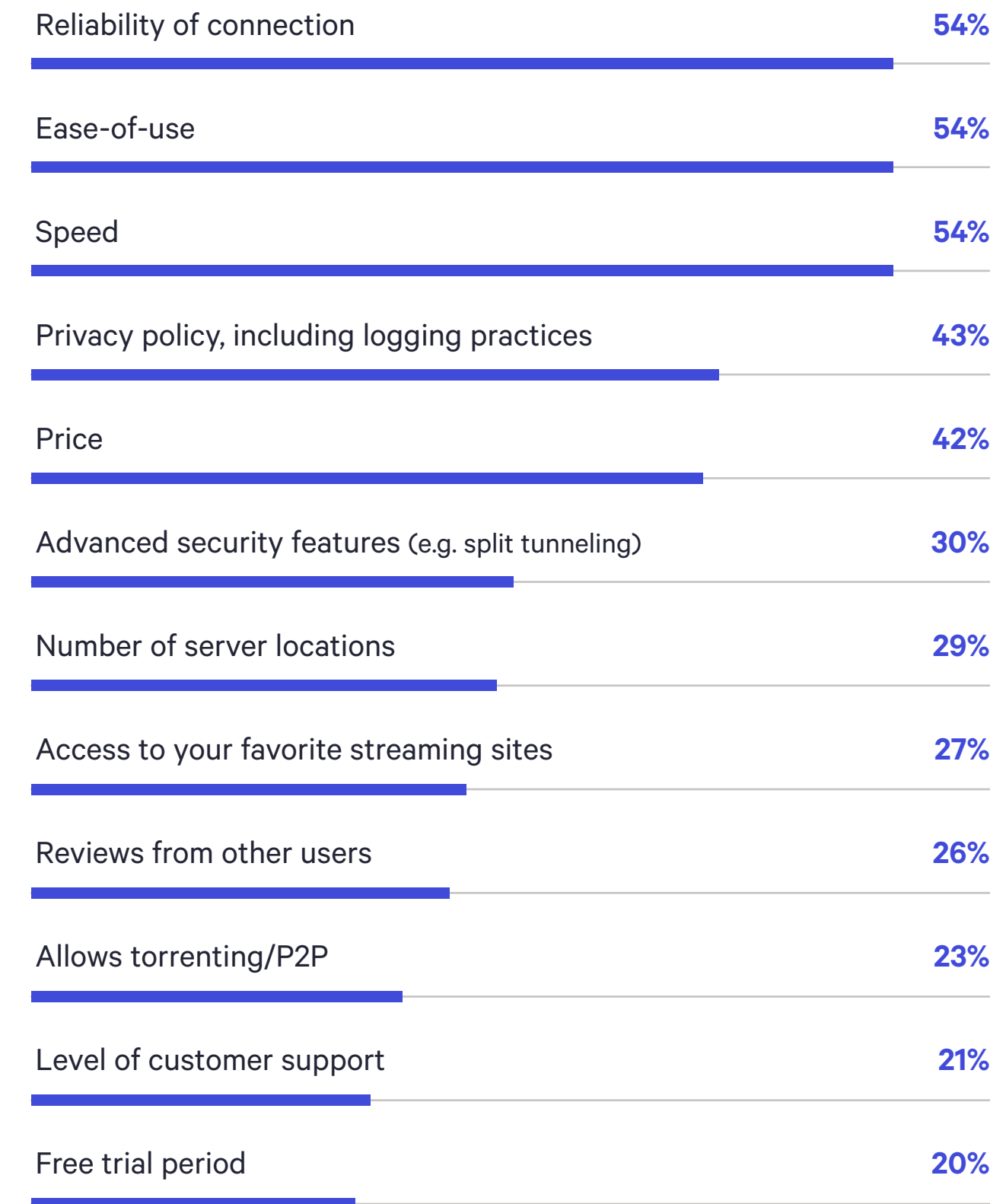
| | |
|---|---|
| Reliability of connection | **54%** |
| Ease-of-use | **54%** |
| Speed | **54%** |
| Privacy policy, including logging practices | **43%** |
| Price | **42%** |
| Advanced security features (e.g. split tunneling) | **30%** |
| Number of server locations | **29%** |
| Access to your favorite streaming sites | **27%** |
| Reviews from other users | **26%** |
| Allows torrenting/P2P | **23%** |
| Level of customer support | **21%** |
| Free trial period | **20%** |

**Question:** What is most important to you when choosing a VPN? Please select all that apply. **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

# Online privacy: The bigger picture

Since 2013, we've seen internet users gradually become more concerned about their online privacy. But it's been a slow growth, and one that can be quite sensitive to specific events. You'll notice in the accompanying chart a spike during Q1 2018, which we put down to fallout from the reporting around Facebook and Cambridge Analytica, as well as the buildup to GDPR, both of which made data protection front-page news.

It's worth emphasizing that this wasn't due to internet users already concerned about privacy suddenly expressing a stronger opinion; it was those who swung from having no opinion into having a strong one on the subject. By the next wave, though, it reverted back to its previous level.

**PRIVACY CONCERNS ON THE MARCH**

% of global internet users who are concerned about the internet eroding their personal privacy
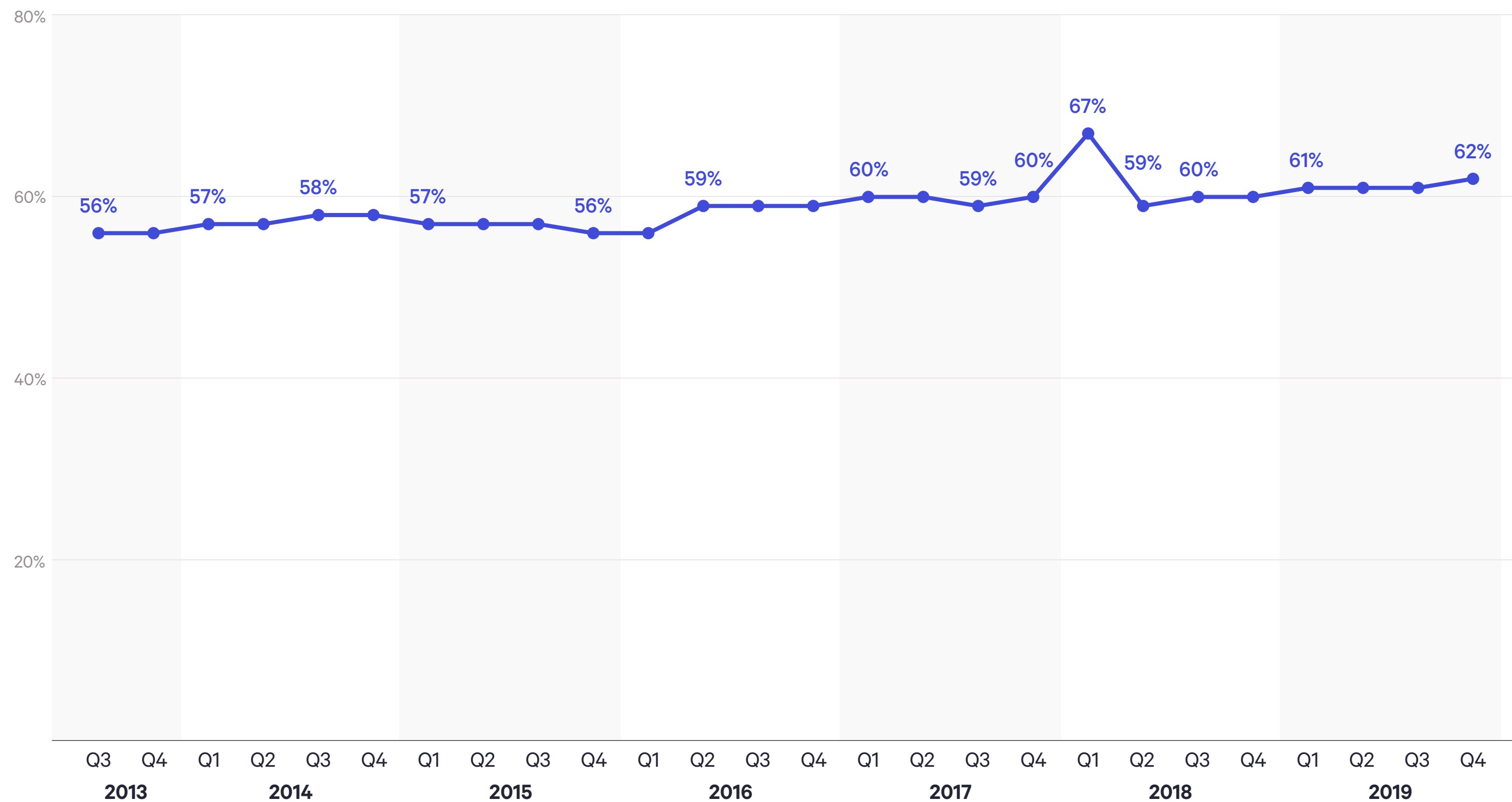
# Other privacy tools

VPNs aren't used as much as ad-blockers, or deleting cookies, or using private browsing windows. While VPN browser extensions are available, there is, broadly speaking, less integration between VPNs and browsers than other privacy tools. VPN usage has grown by 14% since Q2 2017 though, while deleting cookies and blocking ads have stayed at the same level. Internet users are becoming more comfortable with these more specialized privacy tools.

VPN users are more likely than the average internet user to take other measures to protect their online privacy. A VPN user is likely to delete cookies and use private browsing windows as well, whereas someone who uses an ad-blocker will probably delete cookies and browse privately, but might not make the jump to a VPN.

You can look at this data another way. 44% of internet users will block ads, delete cookies or browse privately, but

won't use a VPN. That's a substantial number of internet users who have active interest in protecting their privacy, but may not be aware of the end-to-end protection VPNs offer, or may be unsure of how exactly to use one. Then there is a quarter of internet users globally who don't take any of our tracked privacy measures at all, representing a sizable shortfall in knowledge of protected browsing.

These privacy tools can all be used to different ends, but it points to another consistent theme throughout our research. Internet users are broadly aware of how important it is to protect their online activity, and report concern with it, but they're not always aware of the best tactics to use. Even for internet users that we segment as being privacy-conscious (based on how they answer attitudinal questions about privacy concerns), only a third of them use VPNs.

**PRIVACY TOOLS OVERLAP**

...who are also users of

| users of... | Deleted cookies | Used a private browsing window | Used a VPN/ proxy server | Used an ad-blocker |
|---|---|---|---|---|
| Total | 51% | 54% | 31% | 48% |
| Deleted cookies | | 70% | 46% | 65% |
| Used a private browsing window | 67% | | 47% | 64% |
| Used a VPN/ proxy server | 75% | 81% | | 74% |
| Used an ad-blocker | 70% | 72% | 49% | |
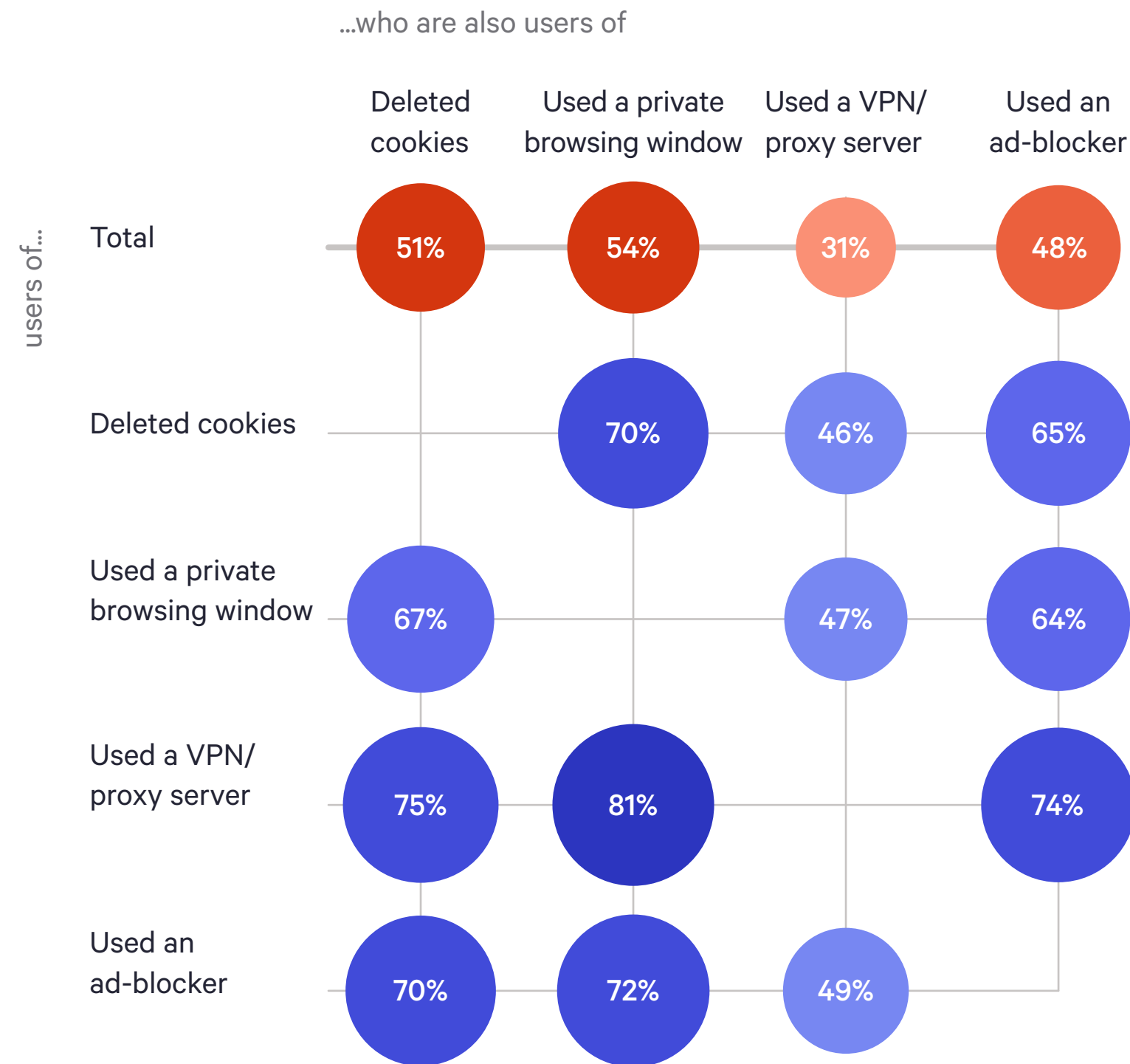
**THE SPREAD OF PRIVACY TOOLS**

% of global internet users who...

- **25%** Use no privacy tools*
- **75%** Use at least 1
- **58%** Use at least 2
- **34%** Use at least 3
- **16%** Use all 4
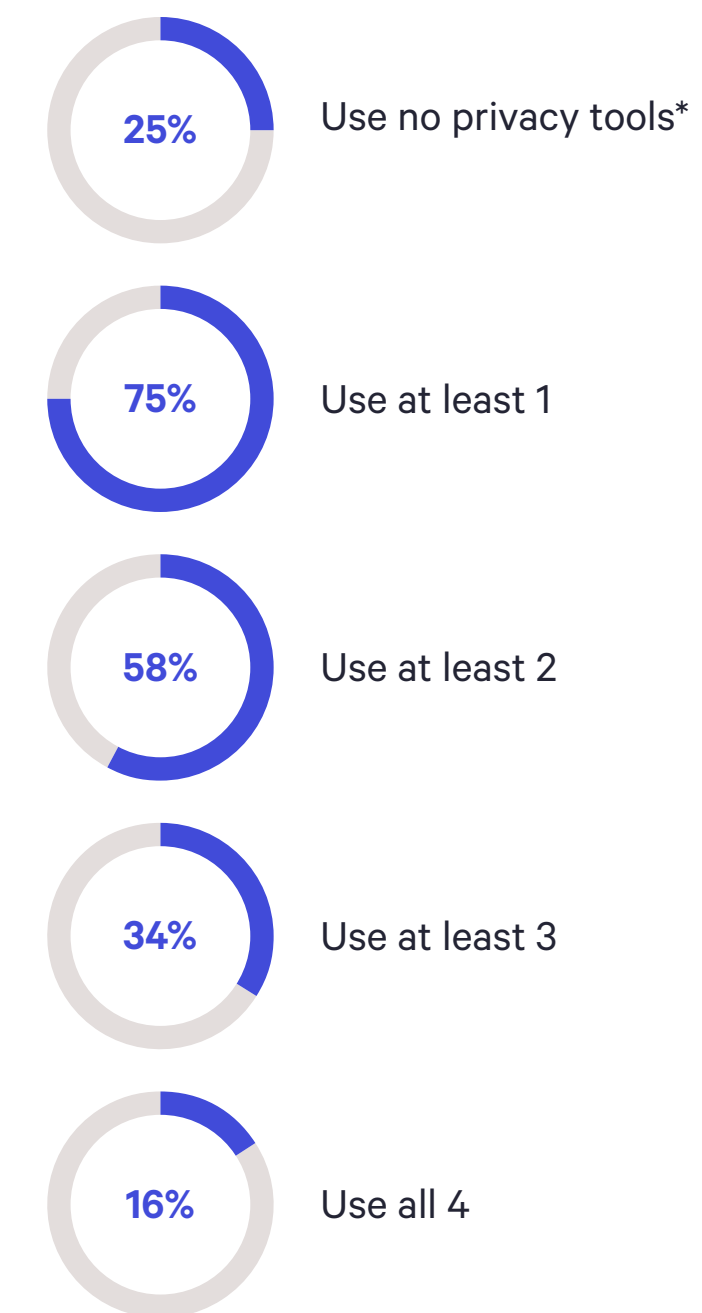
*From a list of 4: private browsing windows, ad-blockers, VPNs, and deleting cookies.

**Question:** In the last month, which of these have you done? **Source:** GlobalWebIndex Q4 2019 **Base:** 142,017 internet users aged 16-64

**Question:** In the last month, which of these have you done? **Source:** GlobalWebIndex Q4 2019 **Base:** 142,017 internet users aged 16-64

**ATTITUDES TO TECHNOLOGY**

% of global VPN users who agree with the following statements

| | | index |
|---|---|---|
| When I need information, the first place I look is the internet | **78%** | 0.99 |
| I am constantly connected online | **69%** | 1.09 |
| There is too much choice online | **67%** | 1.05 |
| The internet makes me feel closer to people | **66%** | 1.05 |
| I worry about how my personal data is being used by companies | **66%** | 1.03 |
| I am concerned about the internet eroding my personal privacy | **63%** | 1.03 |
| It's critical for me to be able to be contactable at all times in terms of my private life | **62%** | 1.07 |
| I feel more insecure without my mobile phone than my wallet | **60%** | 1.10 |
| I prefer to be anonymous when using the internet | **60%** | 1.06 |
| Having the latest technological products is very important to me | **59%** | 1.16 |
| Technology makes life more complicated | **40%** | 1.13 |
| I just don't understand computers and new technology | **31%** | 1.17 |

This is something we've found multiple times in our research. Internet users are frequently reactive, not proactive, when thinking about their online footprint. In our global data on VPN users, they over-index for what seem to be contradicting attitudes. They are more likely than average to want the latest tech products, but also more likely to say they don't understand new tech, or to think that it makes their life more complicated.

Interest in technology may make users more aware of VPNs, but they also seem to be viewed as a safety mechanism, one that addresses the complications and uncertainties of using the internet as a whole. VPNs might not be used just to address privacy specifically, but to take action against an online ecosystem that isn't always transparent, or easy to understand.

Because of this reactive thinking, internet users' attitudes toward personal data tend to focus on worst-case scenarios. In another custom study we ran last year, we found U.S./UK internet users were most worried about cybercriminals and hackers (66%) when thinking about their personal data, and by a considerable distance. The second most popular cause of concern was domestic governments (40%), with social media companies (37%) marginally ahead of foreign governments (34%).

There is admittedly a difference in outcome here – the immediate consequences of cybercriminals accessing personal data are probably the most damaging. But the sheer gap between them and other groups shows that internet users, on the whole, may be less aware of the logistics of large-scale data collection online than they are imagining a single event, like a data breach.

## THE PERSONAL DATA THREAT

% of U.S./UK internet users who are most concerned about the following when thinking about their personal data

| 66% | 40% | 37% | 34% | 32% | 28% |
|---|---|---|---|---|---|
| Cybercriminals/ hackers | My government | Social media companies | Foreign governments | Search engines | Internet Service Providers |

| 25% | 21% | 21% | 16% | 12% |
|---|---|---|---|---|
| Email services | Retail sites | Device manufacturers | Entertainment subscriptions services | My employer |

# Key takeaways

## 01

**VPNs are well-established among internet users, and they're growing.**

As concerns about privacy have increased in recent years, internet users have been compelled to take action.

## 02

**VPNs are used globally, across all types of countries and political environments.**

VPNs are used most in countries that have the most government interference with online life. But as even democracies pass new surveillance laws, they're growing sharply elsewhere too.

## 03

**Privacy is a bigger driver than entertainment.**

VPNs are seen above all as privacy enablers. Accessing content and blocked websites is important to some, but across demographics, they're used to protect browsing first and foremost.

## 04

**Privacy is important to internet users, but with caveats.**

Based on who internet users most fear in relation to their online security, and which types of network most concern them, their approach to privacy appears to stem from a more general worry, rather than from an understanding of data collection practices across online industries.

## 05

**How users choose VPNs is motivated by headline numbers.**

Speed and reliability of connection make the most impact with their users, many of whom are likely unaware of rogue practices from some VPN providers.

# Methodology

### INTRODUCTION

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

For an in-depth explanation of GlobalWebIndex's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please click **here**.

### OUR RESEARCH

As part of our ongoing global research, each year GlobalWebIndex interviews over 688,000 internet users aged 16-64 across 46 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers**. Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

### SAMPLE SIZE BY MARKET

The data in this report is taken from our ongoing global research and two custom surveys. One custom survey was run in **August 2019** among 2,011 internet users in the U.S., and 2,597 internet users in the UK, and was on the theme of data security. The other custom survey we use in this report was run in January 2020 among **2,405 internet users in the U.S. and 2,426 internet users in the UK**, and was about VPNs more specifically.

### OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

### FOR MORE INFORMATION PLEASE CONTACT:

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# Appendix A: Core research data tables

Presented below is further data from our ongoing Core research into VPN users. The data in question is taken from our Q4 2019 wave of research among 142,017 internet users, returning a sample of 38,539 VPN users.

[1] Not China
[2] China and Taiwan Only
[3] India Only
[4] China Only
[5] China, Hong Kong and Taiwan Only

**TV STREAMING SERVICES**

% of global VPN users who have used the following TV/film streaming services in the past month

| | | | index |
|---|---|---|---|
| NETFLIX | Netflix | **56%** | 1.25 |
| prime video | Amazon Prime Video[1] | **23%** | 1.31 |
| iQIYI | iQiyi[2] | **15%** | 0.88 |
| hotstar | Hotstar[3] | **14%** | 1.62 |
| YOUKU | YouKu & Tudou[2] | **14%** | 0.99 |
| SONY | Sony Liv[3] | **12%** | 1.63 |
| NBA | NBA League Pass | **10%** | 1.47 |
| Tencent 腾讯 | Tencent Hollywood VIP[4] | **10%** | 1.01 |
| vimeo | Vimeo | **10%** | 1.52 |

**MUSIC STREAMING SERVICES**

% of global VPN users who have used the following music/audio streaming services in the past month

| | | | index |
|---|---|---|---|
| Spotify | Spotify | **38%** | 1.35 |
| SOUNDCLOUD | SoundCloud | **17%** | 1.50 |
| MUSIC | Apple Music | **16%** | 1.56 |
| | QQ Music[5] | **15%** | 0.93 |
| music | Amazon Prime Music | **15%** | 1.47 |

**DEVICE OWNERSHIP AMONG VPN USERS**

% of global VPN users who own the following devices

| | | |
|---|---|---|
| | Smartphone | **91%** |
| | PC/laptop | **76%** |
| | Tablet | **42%** |
| | Smart TV | **41%** |
| | Games console | **26%** |
| | TV streaming stick/device | **19%** |
| | Smartwatch | **19%** |
| | Smart home product | **16%** |
| | Smart wristband | **14%** |
| | Feature phone | **12%** |
| | e-Reader | **12%** |
| | Virtual Reality headset/device | **7%** |

**Question:** In the last month, which of these services have you used to watch / download TV shows, films or videos? **Source:** GlobalWebIndex Q4 2019 **Base:** 38,539 VPN Users aged 16-64

**Question:** In the last month, which of these services have you used to listen to / download music, radio or audiobook content? **Source:** GlobalWebIndex Q4 2019 **Base:** 38,539 VPN Users aged 16-64

**Question:** Which of the following devices do you own? **Source:** GlobalWebIndex Q4 2019 **Base:** 38,539 VPN Users aged 16-64

# Appendix B: Custom research data tables

Presented below are the complete findings from the custom survey we ran into VPN usage in January 2020, among 2,405 internet users in the U.S. and 2,426 internet users in the UK.

*e.g. Authy or Google Authenticator
**e.g. China or Russia

### PRIVACY TOOLS USED

% of U.S./UK internet users who have used the following in the past 3 months

| | |
|---|---|
| Ad-blocker | 38% |
| Private browsing window | 37% |
| Two-factor authenticator app* | 34% |
| Password manager | 32% |
| VPN (Virtual Private Network) | 24% |
| Privacy-focused browser (e.g. UC Browser, Firefox) | 22% |
| None of the above | 22% |
| Private search engine (e.g. DuckDuckGo) | 13% |

### FREQUENCY OF VPN USAGE

% of U.S./UK VPN users who use them with the following frequency

| | |
|---|---|
| Every day/nearly every day | 36% |
| 4-5 times a week | 17% |
| 2-3 times a week | 17% |
| Once a week | 7% |
| 2-3 times a month | 9% |
| Once a month | 4% |
| Less often | 10% |

### TYPES OF VPN

% of U.S./UK VPN users who use the following type of VPN

| | |
|---|---|
| Free | 72% |
| Paid | 36% |

### WHY PAID VPNs ARE USED OVER FREE ONES

% of U.S./UK paid-for VPN users who use them for the following reasons

| | |
|---|---|
| Data sharing with third parties | 54% |
| Performance restrictions | 47% |
| Targeted in-app advertising | 42% |
| Data restrictions | 41% |
| Limited privacy policy information | 41% |
| Lack of transparency around ownership | 37% |
| General in-app advertising | 35% |
| Poorly designed apps | 28% |
| Service provider links to countries with little internet freedom** | 27% |
| I wouldn't have any problems with using a free VPN | 11% |

**Question:** Which of the following have you used in the past 3 months while browsing online? **Source:** GlobalWebIndex January 2020 **Base:** 2,405 (U.S.) & 2,426 (UK) internet users aged 16-64

**Question:** You've said that you've used a VPN in the last 3 months. How often do you use a VPN? **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

**Question:** And which types of VPN have you used in the last 3 months? **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

**Question:** You've said that you've used a paid VPN, but not a free one. Would any of the following issues stop you from using a free VPN? **Source:** GlobalWebIndex January 2020 **Base:** 152 (U.S.) & 113 (UK) VPN users aged 16-64 who only use paid VPNs

# **Appendix B:** Custom research data tables

Presented below are the complete findings from the custom survey we ran into VPN usage in January 2020, among 2,405 internet users in the U.S. and 2,426 internet users in the UK.

### EXPECTATIONS OF FUTURE VPN USAGE

% of U.S./UK VPN users who see themselves using them for the following lengths of time

| | |
|---|---|
| Up to one month | **4%** |
| 1-3 months | **6%** |
| 3-6 months | **8%** |
| 6-12 months | **7%** |
| 1-2 years | **6%** |
| Ongoing | **44%** |
| Don't know | **26%** |

### VPN USAGE BY DEVICE

% of U.S./UK VPN users who have used them on the following type of device

| | | |
|---|---|---|
| | Smartphone | **64%** |
| | PC/laptop | **62%** |
| | Tablet | **21%** |
| | TV streaming stick (e.g. Kodi) | **14%** |
| | TV | **10%** |
| | Games console | **9%** |
| | Router | **8%** |
| | Other | **2%** |

### WHY ARE VPNs USED?

% of U.S./UK VPN users who use them for the following reasons

| | |
|---|---|
| To protect privacy on public WiFi networks | **51%** |
| To browse the web anonymously | **44%** |
| To communicate more securely | **37%** |
| To access restricted download/stream/torrent sites | **23%** |
| To access better entertainment content | **22%** |
| To access sites/files/services when at work | **22%** |
| To avoid bandwidth throttling (ISPs limiting internet speeds) | **21%** |
| To hide browsing activity from the government | **20%** |
| To access censored websites/content | **18%** |
| To get deals/discounts when buying online | **18%** |
| To access a Tor browser | **14%** |
| Other | **11%** |

**Question:** How long do you see yourself using a VPN for? **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

**Question:** And which devices have you used a VPN on in the last three months? **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

**Question:** Can you please tell us why you use a VPN when using the internet? **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

# **Appendix B:** Custom research data tables

| LOCATIONS WHERE VPNs ARE USED | |
|---|---|
| % of U.S./UK VPN users who use them in the following locations | |
| At home | 81% |
| A café or restaurant | 34% |
| At the workplace | 32% |
| A hotel | 31% |
| At a shopping centre/tourist attraction | 28% |
| At a place of education (e.g. school/college campus) | 27% |
| At an airport/on public transport | 24% |
| Other | 6% |

| FACTORS IN CHOOSING VPNs | |
|---|---|
| % of U.S./UK VPN users who say the following are important to them when choosing a VPN | |
| Reliability of connection | 54% |
| Ease-of-use | 54% |
| Speed | 54% |
| Privacy policy, including logging practices | 43% |
| Price | 42% |
| Advanced security features (e.g. split tunneling) | 30% |
| Number of server locations | 29% |
| Access to your favorite streaming sites | 27% |
| Reviews from other users | 26% |
| Allows torrenting/P2P | 23% |
| Level of customer support | 21% |
| Free trial period | 20% |
| Other | 8% |

| QUALITIES ASSOCIATED WITH VPNs | |
|---|---|
| % of U.S./UK VPN users who think the following terms best describe VPNs | |
| Secure | 62% |
| Useful | 54% |
| Safe | 52% |
| Effective | 51% |
| Necessary | 42% |
| Legal | 26% |
| Empowering | 23% |
| Confusing | 10% |
| None of the above | 3% |

**Question:** In which of the following locations have you used a VPN? **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

**Question:** What is most important to you when choosing a VPN? Please select all that apply. **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64

**Question:** Which of the following qualities / terms do you think best describe VPNs? **Source:** GlobalWebIndex January 2020 **Base:** 536 (U.S.) & 466 (UK) VPN users aged 16-64