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## A. Internet Users Worldwide

eMarketer projects that the number of active Internet users worldwide will climb to nearly 725 million by the year 2004, a 188% increase from the 384.8 million people who were actively using the Internet in 2000. By 2004, only 27% of the world's active Internet users will come from the United States. In 2003, Europe will be home to 30.5% of the world's users, edged out by the Asia-Pacific region with 32.5%, while Latin America will capture 8.3%. The International Telecommunication Union (ITU) produced similar results in its March 2002 estimates of Internet users worldwide by region. In 2002, the sheer number of Internet users in Europe exceeded those in the US for the first time as a result of several years of Internet expansion in Western Europe. eMarketer predicts expansion of the user population at a compound annual growth rate of just over 17%.

### Internet Users Worldwide, by Region, 2000-2004 (in millions)

	2000*	2001*	2002	2003	2004	CAGR 2000-2004
North America**	136.7	156.3	167.7	179.8	196.3	9.5%
Europe	108.3	144.4	175.7	196.2	221.1	19.5%
Asia-Pacific	115.9	165.0	181.5	205.0	235.8	19.4%
Latin America	19.3	26.2	33.1	43.4	60.6	33.1%
Africa	4.6	6.7	7.7	9.2	11.1	24.6%
<b>Total Worldwide</b>	<b>384.8</b>	<b>498.7</b>	<b>565.7</b>	<b>633.6</b>	<b>724.9</b>	<b>17.2%</b>

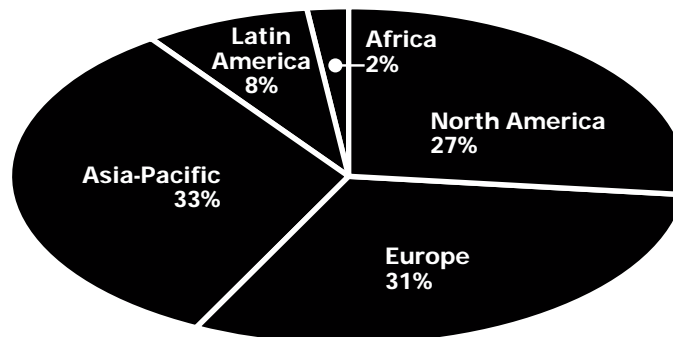
Note: \*eMarketer's year 2000 and 2001 baselines are from the International Telecommunication Union's estimate of internet users aged 2 years and older, who have accessed the internet within the previous 30 days; \*\*North America includes the US and Canada. Mexico is included in Latin America

Source: eMarketer, May 2002

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### Internet Users Worldwide, by Region, 2004



Source: International Telecommunication Union (ITU), March 2002

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Europe and the Asia-Pacific region will also continue to see impressive expansion of Internet penetration, thanks in large part to the explosion in Internet use in previously underdeveloped areas of Eastern Europe.

Research firm iDATE estimates the number of Internet users worldwide grew 24.4% between 2001 and 2002, and predicts further growth of 61% between 2002 and 2006. iDATE concurs with other research firms' conclusions that slowing growth in Internet penetration in North America and Western Europe and Scandinavia indicates those areas will approach saturation in the next several years. The deployment of new broadband access technologies and associated content has the greatest market potential in these areas. iDATE sees significant growth potential in Eastern Europe for Internet adoption, especially for countries that will become members of the European Union shortly.

### Internet Penetration Worldwide, by Region, 2001, 2002 & 2006

	2001	2002	2006
Western Europe (1)	31.2%	37.9%	51.4%
North America	62.3%	66.7%	81.0%
Latin America	3.1%	5.4%	9.1%
Asia-Pacific	3.5%	6.4%	13.3%
Eastern Europe (2)	5.7%	7.0%	15.4%
Africa/Middle East (3)	0.8%	1.1%	3.1%
<b>Worldwide</b>	<b>7.9%</b>	<b>9.8%</b>	<b>15.8%</b>

*Note: (1) includes Scandinavia; (2) includes Russia; (3) includes Turkey and South Africa*

*Source: iDATE, January 2003*

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Additional projections from Computer Economics are more conservative about Europe's growth in terms of its percentage of Internet users worldwide. The firm forecasts the number of Internet users in Europe will not exceed those in the US until 2006. At that point, Computer Economics projects Europe will be home to 28.9% of the world's Internet users.

### Internet Users\* Worldwide, by Region, 2002-2006 (in millions)

	2002	2003	2004	2005	2006
North America	212.6	222.9	234.4	244.7	256.2
Central/South America	25.6	32.7	43.8	59.5	80.8
Europe	163.5	195.5	224.8	240.6	257.4
Middle East/Africa	9.2	10.7	11.6	12.5	13.6
Asia-Pacific	151.3	203.6	238.0	273.0	313.4
<b>Total Worldwide</b>	<b>562.3</b>	<b>665.4</b>	<b>752.6</b>	<b>830.3</b>	<b>921.4</b>

*Note: \*Internet users are defined by Computer Economics as individuals who consistently use the internet with access from either work, school, home or multiple locations*

*Source: Computer Economics, June 2002*

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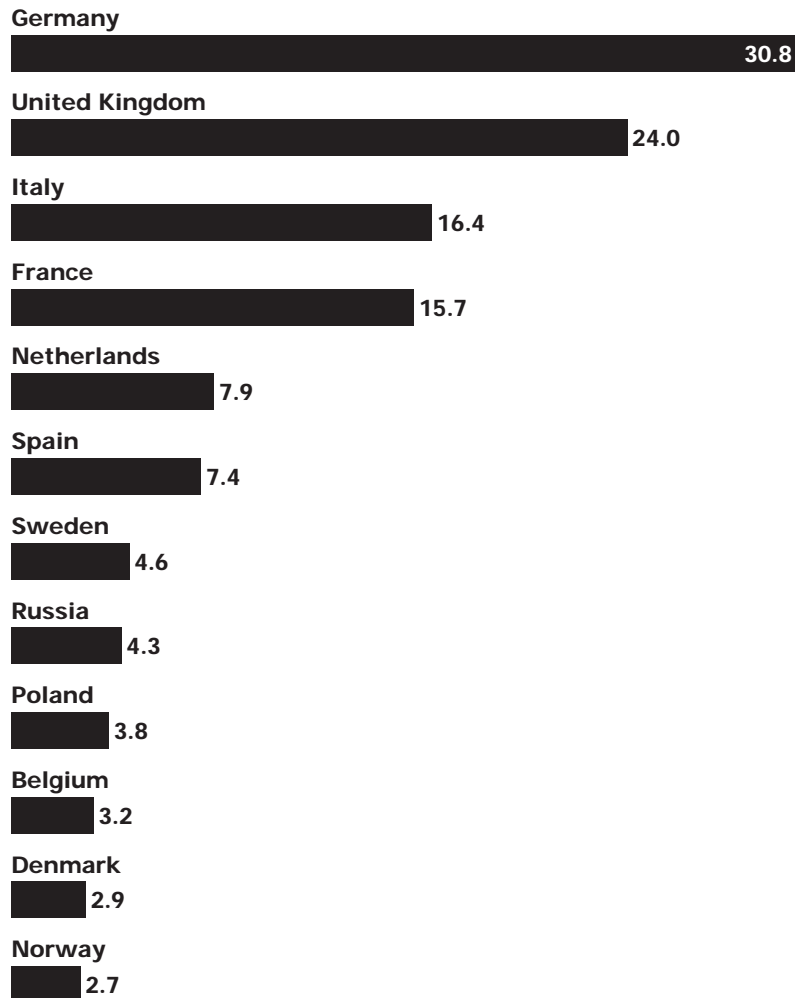
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## B. Internet Users in Europe

eMarketer estimates that a total of 144.4 million Europeans were using the Internet at the end of 2001, including Internet users in countries from Albania to the UK (see Appendix). This region-wide figure, like all of eMarketer's baseline Internet user data for 2002, comes from the International Telecommunication Union (ITU).

The table below, containing December 2002 ITU data, shows the number of Internet users in 2001 for 21 European countries. Four of these countries – Germany, the UK, Italy and France – comprise 63% of the region's Internet users. Because of their sparser populations, Scandinavian countries have far fewer Internet users despite having seen early and widespread adoption of information and communication technologies. Poland and Russia remain the largest Internet markets in the East.

### Internet Users in Selected European Countries, 2001 (in millions)



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**Portugal**  
 2.5

**Finland**  
 2.2

**Switzerland**  
 2.2

**Hungary**  
 1.5

**Greece**  
 1.4

**Czech Republic**  
 1.4

**Slovak Republic**  
 0.7

**Estonia**  
 0.4

*Source: International Telecommunication Union (ITU), December 2002*

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