globalwebindex

Ad-Blocking

A deep-dive into ad-blocking trends

INSIGHT REPORT 2018

www.globalwebindex.com

Contents

Introduction

In this report we take a deep-dive into digital ad-blocking, looking at who is using ad-blocking tools, what devices they are using them on, why they do it, and what this means for brands.

Key Insights

4 in 10 of the online population are blocking ads.

It's most popular in Asia Pacific, but mature English-speaking markets aren't far behind. Ad-blocking spreads evenly across income, and those who block ads do it frequently. It's likely to be lack of awareness, rather than lack of *willingness*, stopping it from spreading.

More people block on PCs than mobiles.

But mobile ad-blocking is most popular in fast-growth regions where new users will get online through smartphones, and will grow on mobile in the West as more activities migrate to the smaller screen.

For those who block ads, it's done by default.

Whitelisting and multi-device usage can allow traditional ads to penetrate, but it's safe to assume that users deploy their ad-blocking tool almost every time they get online. 6 in 10 use them every day.

Poorly served ads cause ad-blocking.

In most markets, users are driven to block by ad-fatigue, and in mobile-first parts of the world, ads restrict internet access at a basic level.

Online ads are still impactful, but other avenues should be explored.

This can be achieved through more relevant ads or meeting the consumer somewhere else – either through branded content, or through influencers.

Ad-Blocking

Who Blocks Ads?

Insight Report 2018

Demographics

Ad-blocking is now very much a part of the online world. **Close to half of all internet users are ad-blocking**, with men and younger age groups most likely to. Unlike Virtual Private Networks (VPNs), which the top bracket over-index for using, ad-blocking is even across income groups.

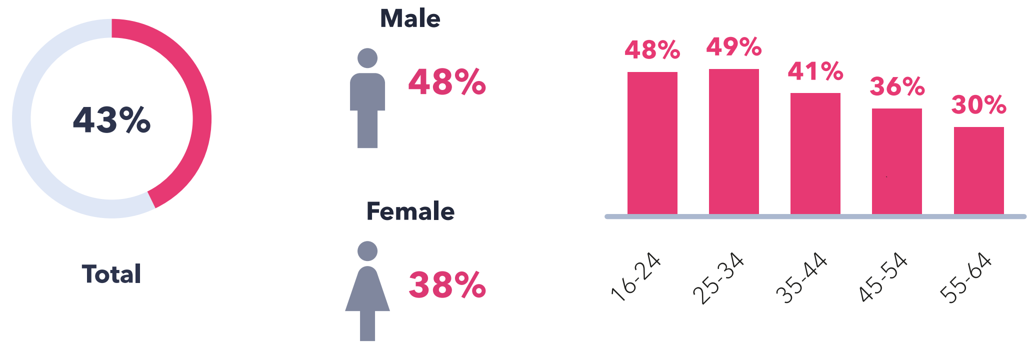
Ad-blocking is most common in Asia Pacific

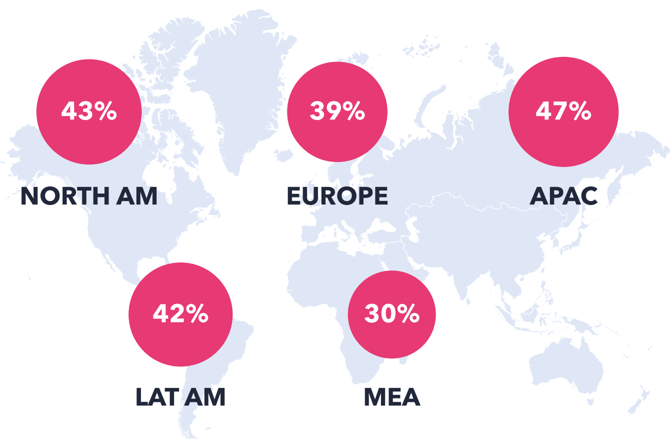
It's closest to the mainstream in Asia Pacific, with the Middle East and Africa (30%) lagging behind other regions. The uptake of ad-blocking in APAC is largely due to a regional preference for mobile-first browsing. With smaller screens on mobile, ads take up a higher proportion of screen space, and can use up precious data allowance. But mobile-first browsing is a hallmark of MEA too, which suggests that while awareness in some regions is behind APAC, **ad-blocking is set to spread worldwide.**

Young men are most likely to block ads

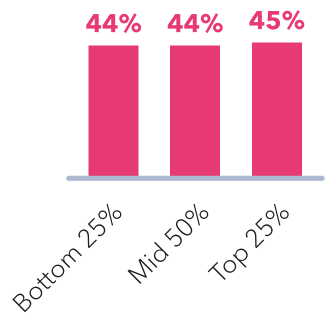
THE SPREAD OF AD-BLOCKING

% who have used an ad-blocker in the last month





INCOME



Questions: Which of the following have you done in the last month?/ Used an ad-blocker to stop ads being displayed
Source: GlobalWebIndex Q1 2018 **Base:** 109,780 internet users aged 16-64

By Market

China and India, with two of the largest internet markets in the world, are in the top 5 markets we track for ad-blocker adoption. Figures in China are helped by local tools which help streamline performance on mobile, such as UC Browser, the Alibaba-owned browser which blocks ads by default.

The countries with the **highest levels of ad-blocking are clustered around South East Asia.** But there is another geographical trend, spearheaded by the U.S.A. (43%), of more mature, typically English-speaking markets, with New Zealand (43%), South Africa (41%), and Canada (40%) all performing well. With these trends happening in parallel, we can see that **ad-blocking is not a region-specific phenomenon.**

Looking at the bottom of the list identifies the countries which cause MEA to lag behind other regions, with the African markets of Morocco (15%), Ghana (21%), Nigeria (25%), and Kenya (27%) seeing a much lower adoption of ad-blockers. These figures are affected by low level of PC ownership in the region, but given how smartphone dependence has led to increased ad-blocking on mobile in APAC, **it would be natural for these African countries – where internet users are frequently mobile-first or mobile-only – to follow the trend eventually.** For the time being though, capabilities and tools in APAC are ahead of those available elsewhere.

Internet users in APAC are ahead of the curve for blocking ads on mobile

AD-BLOCKING AROUND THE WORLD

% of internet users who block ads on any device each month

Indonesia	53%
Malaysia	51%
India	51%
Philippines	50%
China	49%
Taiwan	47%
Portugal	45%
Turkey	45%
Poland	45%
Austria	44%
U.S.A.	43%
New Zealand	43%
Singapore	43%
Mexico	42%
Argentina	42%
Brazil	42%
South Africa	41%
Spain	41%
Germany	41%
Canada	40%
UAE	39%

Vietnam	39%
Russia	38%
UK	38%
Switzerland	37%
Hong Kong	37%
Thailand	37%
Sweden	37%
Saudi Arabia	36%
Ireland	36%
France	36%
Egypt	36%
Australia	36%
Italy	35%
Belgium	34%
Netherlands	30%
South Korea	27%
Kenya	27%
Nigeria	25%
Ghana	21%
Japan	18%
Morocco	15%

Questions: Which of the following have you done in the last month?/ Used an ad-blocker to stop ads being displayed
Source: GlobalWebIndex Q1 2018 **Base:** 109,780 internet users aged 16-64

Ad-Blocking

Why Are Ads Blocked?

Motivations

AD-BLOCKING MOTIVATIONS

% of Ad-Blocker Users who block ads for the following reasons

There are too many ads on the internet	48 %
Too many ads are annoying or irrelevant	47 %
Ads are too intrusive	44 %
Ads sometimes contain viruses or bugs	39 %
Ads take up too much screen space	37 %
To speed up page loading times	33 %
I try to avoid all ads wherever, whether on TV or online	28 %
To avoid having to see video ads before watching clips/shows	28 %
Ads might compromise my online privacy	25 %
I want to stop my data allowance from being used up	23 %
To stop my device's battery life being drained	22 %
To stop ads being personalized based on my browsing history	20 %

TOP OVER-INDEXES BY AGE

16 to 24	To avoid having to see video ads before watching clips/shows
25 to 34	I want to stop my data allowance from being used up
35 to 44	To stop my device's battery life being drained
45 to 54	To stop ads being personalized based on my browsing history
55 to 64	To stop ads being personalized based on my browsing history

Ad-frustration, whether from annoyance with ads or a feeling that they're excessive, is the most popular motivation to block ads in all age groups, peaking with the 55-64s (62%). In research carried out by Ad Lightning, a company who develop a software platform to monitor ad performance, they found that **4 in 10 online ads were oversized** – a huge restriction on user experience as page loading times become compromised.

Among mobile-first internet users, this bloatedness is a key factor in driving them to block ads. **Younger users, especially those in mobile-first markets, are more likely to use ad-blockers to save data allowance, battery life, or screen size.**

While ad-frustration is high across all generations, blocking to stop personalized ads is relatively low. But older users are something of an exception, as **55-64s (31%) are more likely to block because of those kinds of ads.** Personalized and relevant advertising, compared with ads of the anonymous and excessive kind, can be an effective way to reach Ad-Blocker Users, but any strategy should bear in mind that there may be greater resistance among older users.

Questions: What are your main reasons for blocking ads while you use the internet? **Source:** GlobalWebIndex Q1 2018 **Base:** 39,166 Ad-Blocker Users aged 16-64

Motivations

Looking at the biggest drivers to block ads by country, **few corners of the globe are untouched by ad-frustration.** Certain countries are an exception, but the importance of mobile devices in countries around South East Asia means that users in China, Taiwan, Indonesia and Vietnam are all most likely to do it to stop ads intruding on their screen space; an important commodity when their main screen is so much smaller.

Ad-fatigue is a worldwide phenomenon, leading to multi-device ad-blocking

TOP MOTIVATION BY COUNTRY

THERE ARE TOO MANY ADS ON THE INTERNET

Argentina
Brazil
France
Malaysia
Mexico
Portugal
Switzerland
Thailand
Turkey

TOO MANY ADS ARE ANNOYING OR IRRELEVANT

Australia
Austria
Belgium
Canada
Egypt
Germany
Hong Kong
India
Ireland
Japan
Netherlands
New Zealand
Saudi Arabia
Singapore
South Africa
South Korea
Spain
Sweden
UAE
UK
USA

ADS ARE TOO INTRUSIVE

China
Indonesia
Italy
Poland
Russia
Taiwan
Vietnam

ADS SOMETIMES CONTAIN VIRUSES OR BUGS

Philippines

Questions: What are your main reasons for blocking ads while you use the internet? **Source:** GlobalWebIndex Q1 2018 **Base:** 39,166 Ad-Blocker Users aged 16-64

Ad-Blocking

How are Ads Blocked?

Ad-Blocking Devices

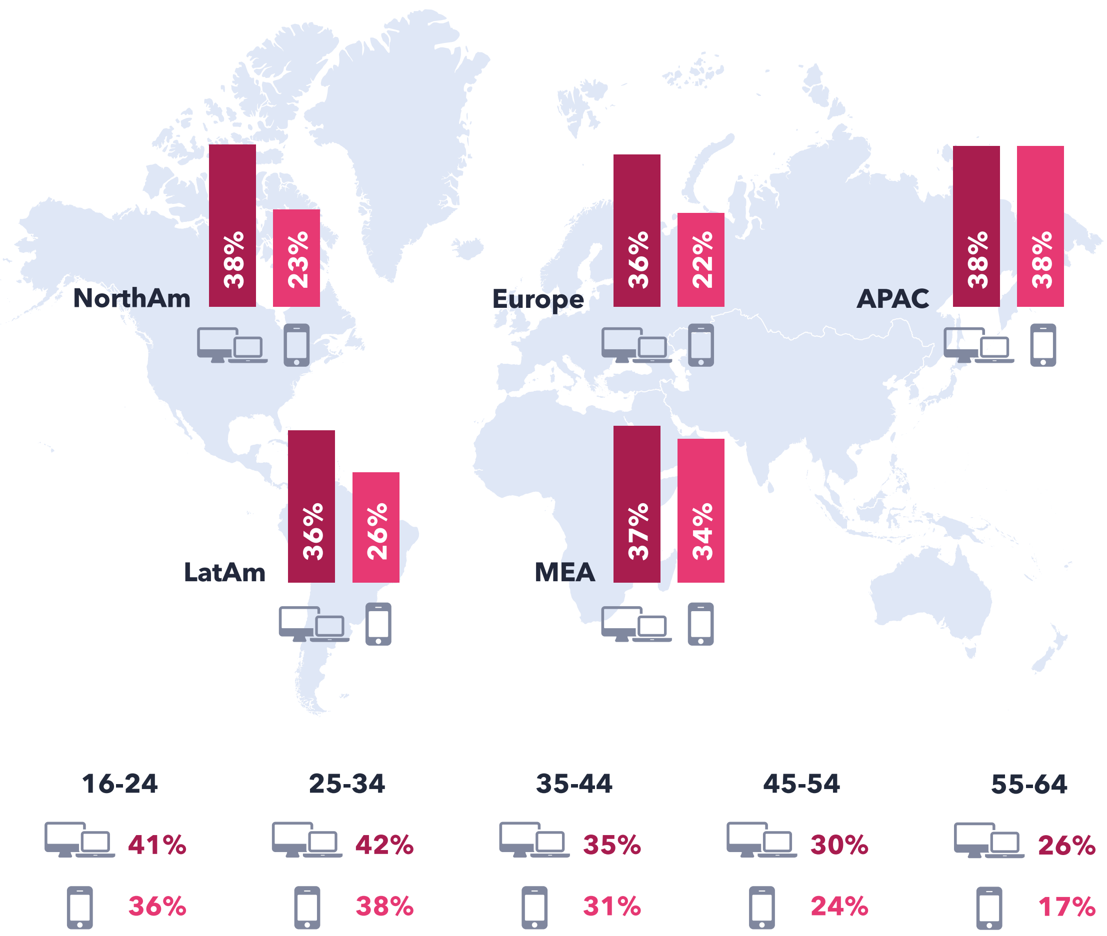
Ad-blocking on PCs/laptops (37%) has the lead over mobile (32%) worldwide, though the picture changes according to regional preferences. APAC sees mobile ad-blocking level with desktop, but in mature markets, the older age profile of users means they are more wedded to their desktops, and so aren't blocking on mobile as much. As more online activities migrate to smartphones though, **it's likely figures for mobile in mature markets will catch up** as users are compelled to block ads which are more intrusive on a smaller screen.

Currently, there are only three countries (Saudi Arabia, Thailand and China) where ad-blocking on mobile is above PCs and laptops. Part of the reason why those countries are ahead is because their online populations are skewed younger, and so place more emphasis on mobile in their day-to-day activities.

Mobile ad-blocking in the West is likely to catch up with APAC

AD-BLOCKING DEVICES

% of internet users who block ads on the following devices at least once a month



Questions: On average, how frequently do you use an ad-blocker on the following?. **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

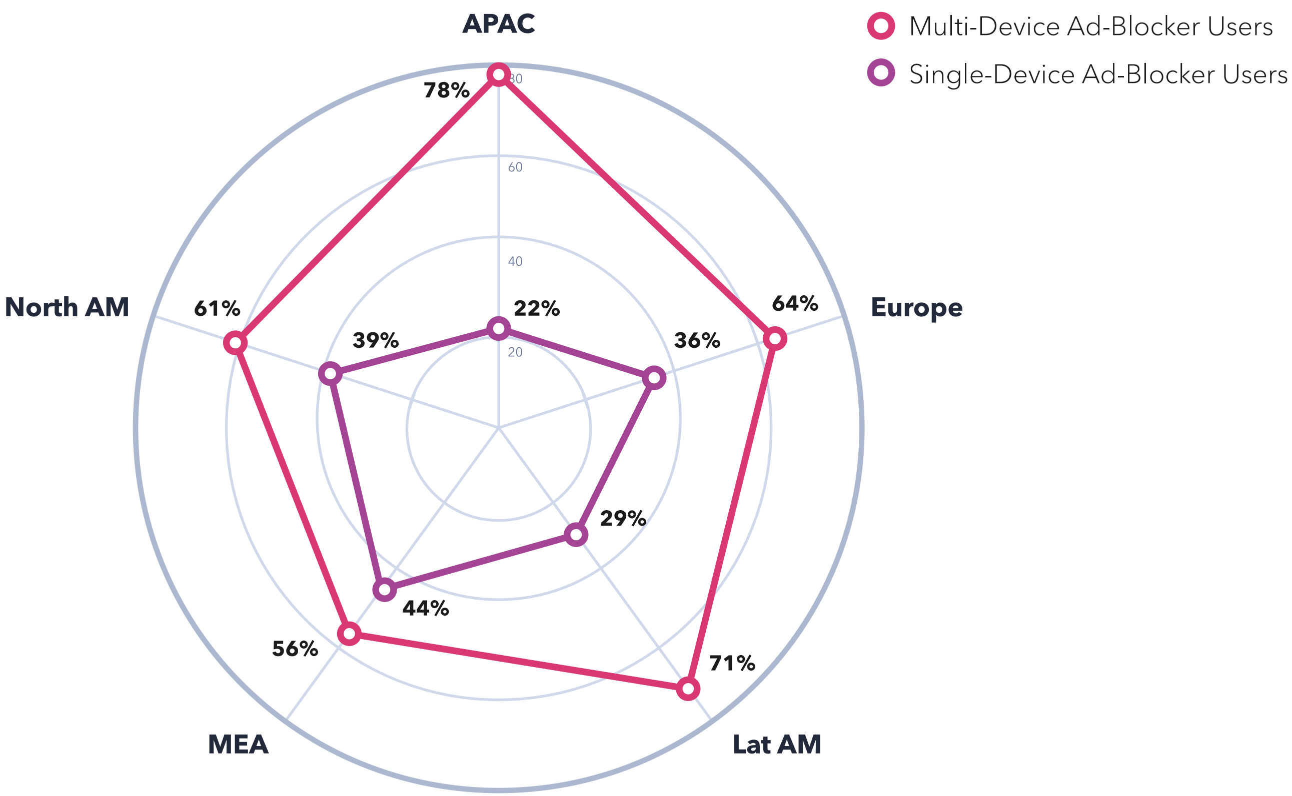
Ad-Blocking Devices

Ad-Blocker Users in all regions tend to be blocking across multiple devices. An internet user may be able to see an ad on their mobile which they would otherwise have missed on their PC, but addressing the root cause of user discontent is likely to be more effective than trying to target users with frustrating ads in a different place.

Ad-Blocker Users in all regions are more likely than not to be blocking across multiple devices

AD-BLOCKING DEVICES

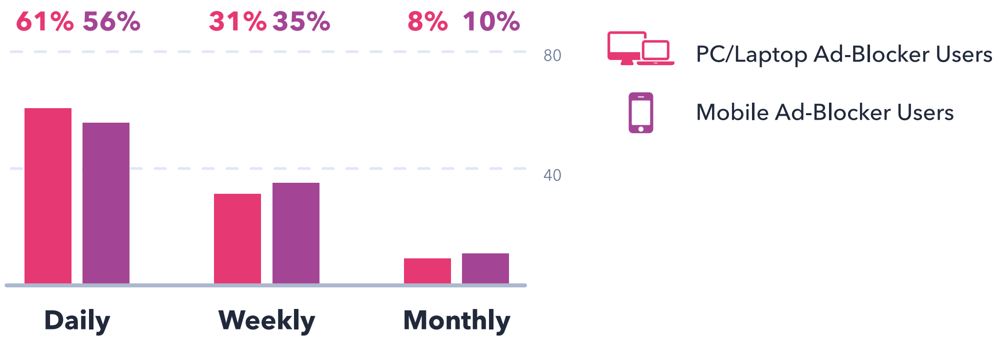
% of Ad-Blocker Users who fall under the following segmentations



Questions: What are the main reasons for blocking ads while you use the internet? **Source:** GlobalWebIndex Q1 2018 **Base:** 90,021 internet users aged 16-64

Frequency

AD-BLOCKING FREQUENCY
% of PC/Mobile Ad-Blocker Users who block ads with the following frequency



With the majority blocking ads at least daily, **ad-blocking is a default activity**, done nearly every time the internet is accessed. This is a trend consistent across all ages and regions, and shows the level of frustration with much of online advertising among Ad-Blocker Users.

The majority use ad-blockers each time they go online

TREND IN ACTION

Google Brings Ad-Blocking to Chrome

Since joining the Coalition for Better Ads in 2017, Google has been quick to implement the association's recommendations onto its software. From February 2018, Google's Chrome browser has blocked "bad" ads by default; those which take up the full screen, autoplay sound and/or video, and those with deceptive close buttons, to list a few. **In addition to Google's search algorithm increasingly demoting sites which load slower on mobiles**, it's clear the advertising giant is taking a stand against poorly served ads – on all devices.

Questions: On average, how frequently do you use an ad-blocker on the following? **Source:** GlobalWebIndex Q1 2018 **Base:** 33,405 PC/Laptop Ad-Blocker Users/25,106 Mobile Ad-Blocker Users aged 16-64

Ad-Blocking

How Can Ad-Blocker Users Be Reached?

Insight Report 2018

The Personalization Opportunity

THE PERSONALIZATION OPPORTUNITY
% of Ad-Blocker Users who discover brands via personalized purchase recommendations on a website

16-24	25-34	35-44	45-54	55-64
19%	19%	18%	15%	13%

We've seen that older internet users may be more resistant to the prospect of personalized advertising, but younger users are more comfortable with it, and this is reflected in their brand discovery preferences. Discovering brands through personalized purchase recommendations reaches its peak of 1 in 5 for 16-24s, putting it at about the same level as an update on a brand's social network page. As a source of brand discovery, **personalization has greatest traction in fast-growth countries like Nigeria, Saudi Arabia, and Brazil**, by and large because their internet populations skew young.

TOP 5 MARKETS

Nigeria	**27%**
Morocco	**27%**
Saudi Arabia	**26%**
Philippines	**24%**
Malaysia	**24%**

Personalization is most likely to be successful among younger internet users

TREND IN ACTION

Personalized Ads from O2

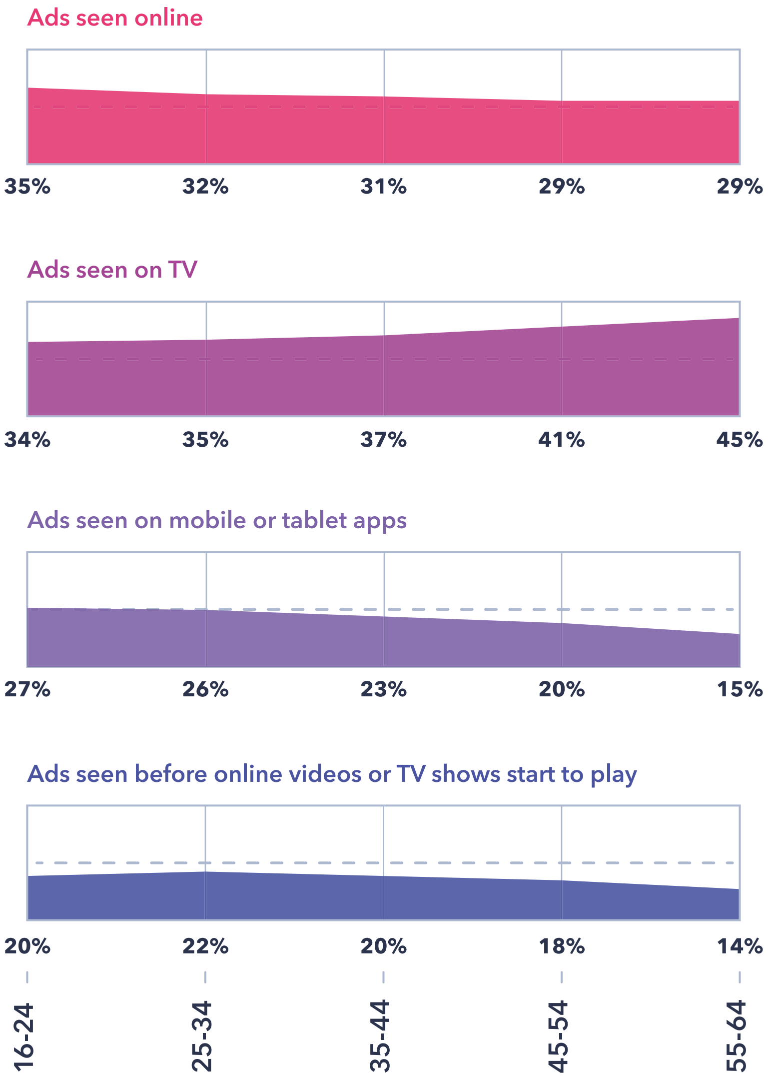
Looking to make their "tariff refresh" ad more relevant and engaging for mobile audiences, 02 used data based on device and location to tailor their messaging to their consumers. Using this data, they could offer personalized ads that showed what the best offer for that individual was, what similar users preferred to upgrade to, and where their nearest store was located – and the personalized ads performed 128% better in terms of click-through rate.

Questions: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex Q1 2018 **Base:** 45,526 Ad-Blocker Users aged 16-64

Ad Effectiveness through Relevancy

AD EFFECTIVENESS THROUGH RELEVANCY

% of Ad-Blocker Users who discover brands in the following ways



3 in 10 Ad-Blocker Users are discovering brands through online ads, a figure which, even for an audience defined by ad resistance, still makes it the fourth most effective form of brand discovery overall. This figure may be a result of some ads slipping through the net, whether through whitelisting, multi-device usage or selective use of ad-blocking tools. But more practically, it may also be evidence of how the right ads can still appeal to Ad-Blocker Users. Our data on ad-blocking motivations shows that most Ad-Blocker Users use those extensions because ads are excessive and irrelevant. As such, **contextually relevant and unobtrusive ads work.**

Discovering brands through ads seen in apps tails off with age, as younger users are more likely to browse through apps on mobile, but the fact that it is close to ads seen online for 16-34s shows their effectiveness, being harder to block. Pre-roll ads, one way brands have tried to avoid ad-blocking, is further down the list, though it is more consistent across age groups.

Relevant and unobtrusive ads can still be effective for Ad-Blocker Users

The widespread use of ad-blocking focuses attention back to traditional media, particularly TV. TV ads, while expensive, **are the top source of brand discovery among ads for all age groups bar 16-24s**, with its lead particularly pronounced for Baby Boomers. TV may not have the capacity to target audiences like online ads do – at least until addressable TV becomes more mainstream – but this is offset by its greater reach and its advantages surrounding return on investment.

Questions: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex Q1 2018 **Base:** 45,526 Ad-Blocker Users aged 16-64

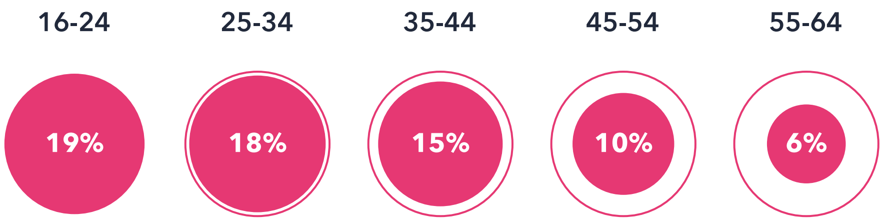
Evolution of Conventional Advertising

While there is room for conventional online advertising to work with an audience of Ad-Blocker Users, **the underlying frustration with ads requires a deeper rethink of how to contact consumers.** Here we outline two potential methods of marketing which have gained traction of late: influencers and content.

The theory behind influencer marketing is that consumers are more likely to buy if a product is suggested by someone they find inspirational, rather than pushed through an anonymous ad. Influencer marketing can be difficult to identify as a source of brand discovery as it is designed to be non-interruptive. Still, **1 in 5 16-34s say they discover brands through celebrity recommendations, though it's not as popular with older internet users.** However, any use of influencer marketing needs to be relevant, transparent and authentic to its audience.

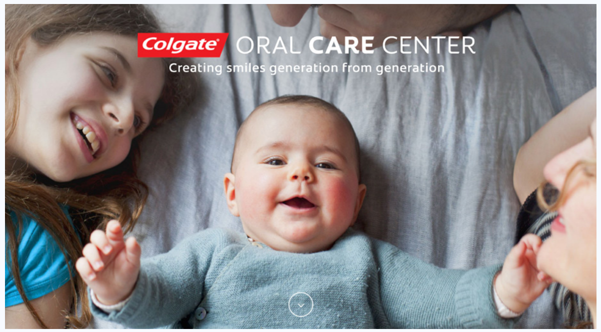
EVOLUTION OF CONVENTIONAL ADVERTISING

% who discover brands through endorsements by celebrities or well-known individuals



TREND IN ACTION

Content Marketing Not Just a Big-Budget Tactic



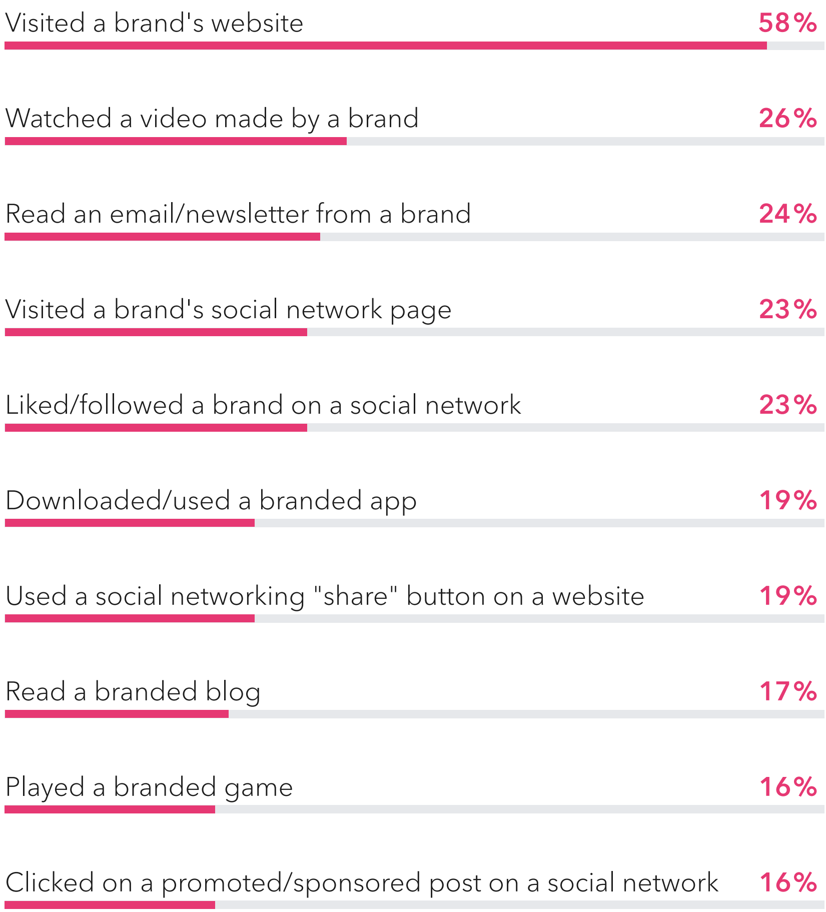
Red Bull may be able to drop a man from space, while a product like toothpaste is more functional. But from our data, we know the biggest role Ad-Blocker Users want from brands is to educate them. Colgate have tapped into this to their advantage with the "Oral Care Centre" section of their website, which educates readers all about oral and dental health, and the role their products have in maintaining it. Content marketing doesn't have to be limited to exciting or aspirational brands.

Question: In which of the following ways are you most likely find out about new brands, products, or services? **Source:** GlobalWebIndex Q1 2018 **Base:** 45,526 Ad-Blocker Users aged 16-64

Evolution of Conventional Advertising

EVOLUTION OF CONVENTIONAL ADVERTISING

% of Ad-Blocker Users who have done the following in the past month



As part of the rethink of how to contact consumers, brands should think about how they can draw consumers in, as well as the messages they push out. Most interactions between brands and users are passive in nature, with visiting a brand's website at the top of the list (58%). But with over half of this audience choosing to visit a branded space when they're turning away from ads, it's a vital touchpoint. It can convert into something meaningful too, with **29% of Ad-Blocker Users saying they discover brands through their websites.**

Watching video content takes second place for brand interactions. While 1 in 3 Ad-Blocker Users use tools to stop pre-roll ads, **just as many are willing to track down video content made by brands,** assuming it is compelling enough. With the boundary between entertainment and marketing becoming more blurred, brands have an opportunity to engage consumers in unique experiences. Video, location-based tools and QR codes are just some routes brands can use to take their marketing to the next level.

Even **the internet's very first banner ad**, AT&T's "You Will", can offer some lessons in providing value to consumers. After users clicked on the banner, they saw not just information about the company, but were also pointed to a directory of galleries and museums which had websites of their own. Even in those early days, there was a value proposition to the ad beyond just directing traffic to a website. **It's this value creation in branded content which is likely to be the meaningful interaction in the future,** rather than trying to force a click onto a consumer.

Questions: Which of the following actions have you done online in the past month? **Source:** GlobalWebIndex Q1 2018 **Base:** 39,166 Ad-Blocker Users aged 16-64

The Impact on News Media

Few industries have been disrupted by ad-blocking as news media has, with its traditional reliance on advertising income. As we have detailed in this report, **ad-blocking is by and large a reaction to the intrusiveness and irrelevance of digital advertising,** so it shouldn't be assumed that Ad-Blocker Users are unwilling to engage with any form of value-exchange; more than two-thirds paid for some form of digital content in the last month.

THE IMPACT ON NEWS MEDIA
% who have used an ad-blocker in the last month

News Website Visitors	Business News Website Visitors
49%	58%

CASE STUDY

The New York Times Opts for Subscriptions Over Ads

The New York Times

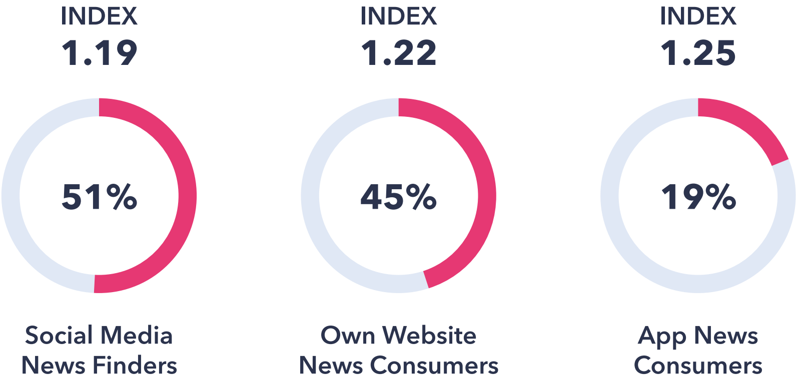
In 1997, the New York Times earned twice as much money through advertising as it did through circulation and subscriptions. Twenty years later, the picture is very different as the newspaper's paywall strategy has paid off with a rise in digital subscribers. The NYT now has 3.5 million paid subscriptions, double the figure from 2015. The news market remains tough, but the NYT has demonstrated it is possible to survive and thrive by focusing on subscriptions.

When it comes to who is choosing to pay for news services, 25-44s are the most likely to do so. Region-wise, Europe (6%) and North America (5%) trail, with the highest levels of engagement in APAC (14%). Especially when compared to the figures for buying other forms of digital media, these are currently low figures and highlight how **making consumers aware of the value-exchange in consuming news media is critical.**

Question: Which of the following types of online content have you paid for in the past month? **Source:** GlobalWebIndex Q1 2018 **Base:** 45,526 Ad-Blocker Users aged 16-64

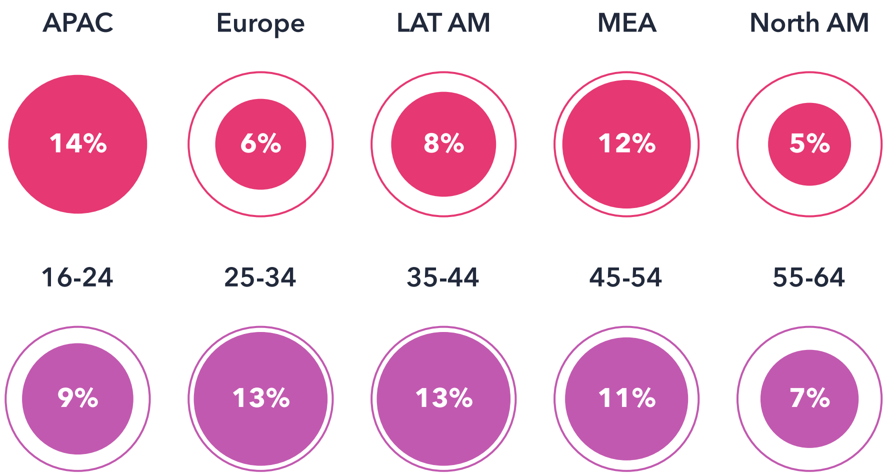
The Impact on News Media

% of Ad-Blocker Users who fall under the following groups*



THE IMPACT ON NEWS MEDIA
% of Ad-Blocker Users who have purchased the following kinds of digital content in the last month

NEWS SERVICE



Half of all News Website Visitors have used an ad-blocking tool in the past month. This does not mean that they have used an ad-blocker every time they visited a news website – selective ad-blocking, whitelisting, and multi-device usage all mean that ads can penetrate. There are also services like PageFair and Secret Media which make ads harder to block. **But the fact that half of the news media audience is choosing to cut off a revenue stream at source underlines the scale of the challenge to the industry.** In their haste to make ads seen by visitors to their websites, **publishers must be cautious not to overlook the quality and intrusiveness at the heart of the ads they serve;** as we have already seen, that is what provokes ad-blocking the most.

Within our data, we can segment users based upon where they find news, whether through apps, publisher websites, or social media. Apps are worth special attention, as it's harder to block ads within an app interface, and they offer micropayments as a revenue stream. News consumption through this channel currently remains a minority behind social media and publisher's own websites, but it's encouraging that **Ad-Blocker Users are 32% more likely to find their news this way.**

*Segmentations are defined as those who say they have seen a video, article or story in the last month from at least one of 25 named online news services via:

Social Media News Finders - on social media

Own Website News Consumers - a publisher's own website.

App News Consumers - on a news app

Questions: In the past month, which of the following things have you done on the internet via any device? / Used an ad-blocker to stop ads being displayed **Source:** GlobalWebIndex Q1 2018 **Base:** 65,888 News Website Visitors aged 16-64 / 36,475 Business News Website Visitors aged 16-64

Questions: For these services, could you tell us where you have seen one of their videos, articles or stories online during the last 30 days? **Source:** GlobalWebIndex Q1 2018 **Base:** 39,166 Ad-Blocker Users aged 16-64

Implications & Future Outlook

Ad-blocking is here to stay.
With new internet users in fast-growth markets likely to use ad-blocking tools as they come online, and with consumers in mature regions likely to adopt them on mobile as well as PC, it must be considered part of the online fabric.

Ad formats need to become more streamlined for faster/lighter loading.
If pages load slowly, internet users veer away from that site or turn to ad-blocking, meaning fewer ad impressions and disruptions to publishers' revenue.

Relevant and contextually well-placed advertising is a must.
Irrelevant and excessive advertising inspires users in all regions to adopt ad-blocking tools.

Brands have to think beyond the click.
Ad-blocking removes one touchpoint between brand and consumer, but provides an opportunity to consolidate on others, whether it's investing in content, or utilizing influencers. Brands can make inroads by making themselves a source of entertainment or education.

Consumer education of the value-exchange in consuming news is vital.
On top of thinking about how to get ads in front of eyeballs, there needs to be consumer awareness over what's at stake. The popularity of reading news needs to be matched by knowledge of the value transaction in viewing news content.

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.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 350,000 internet users aged 16-64. 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).

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.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download **this document.**

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q1 2018 wave of research across 42 countries, which had a global sample size of 109,780 (with 90,021 surveys completed on PC/laptop/tablet and 19,759 surveys completed on mobile). Among this sample, 45,526 said that they had used an ad-blocking tool in the last month. The sample by market breaks down as follows:

Market	GlobalWebIndex Sample	Ad-Blockers
Argentina	1,581	692
Australia	2,291	788
Austria	1,326	568
Belgium	1,301	432
Brazil	2,330	990
Canada	2,288	901
China	15,142	7,859
Egypt	1,759	658
France	3,329	1,163
Germany	2,906	1,164
Ghana	1,000	221
Hong Kong	1,787	714
India	4,063	2,130
Indonesia	1,785	947
Ireland	1,250	447
Italy	2,836	1,011
Japan	1,791	308
Kenya	1,000	276
Malaysia	1,556	796
Mexico	2,602	1,151
Morocco	1,000	155
Netherlands	1,312	396
New Zealand	1,288	538
Nigeria	1,000	286
Philippines	1,561	792
Poland	1,833	831
Portugal	1,310	607
Russia	2,296	891
Saudi Arabia	1,256	488
Singapore	2,517	1,142
South Africa	1,527	627
South Korea	1,251	357
Spain	2,849	1,180
Sweden	1,292	464
Switzerland	1,265	451
Taiwan	1,819	900
Thailand	1,533	573
Turkey	1,576	731
UAE	1,781	737
UK	7,810	2,823
United States	16,179	6,672
Vietnam	1,573	669

Notes on Methodology: Internet Penetration Rates

INTERNET PENETRATION RATES ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

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. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. 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. This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2018. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

INTERNET PENETRATION RATES (GLOBALWEBINDEX'S FORECASTS FOR 2018 BASED ON 2016 ITU DATA)

Table below refers to the total population in each market

Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.3%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%

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