Image-Conscious Consumers

Examining the profile, online life, and social media habits of the Image-Conscious Consumer

AUDIENCE REPORT 2018

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Contents

Introduction

GlobalWebIndex Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population. In this report, we place the spotlight on Image-Conscious Consumers.

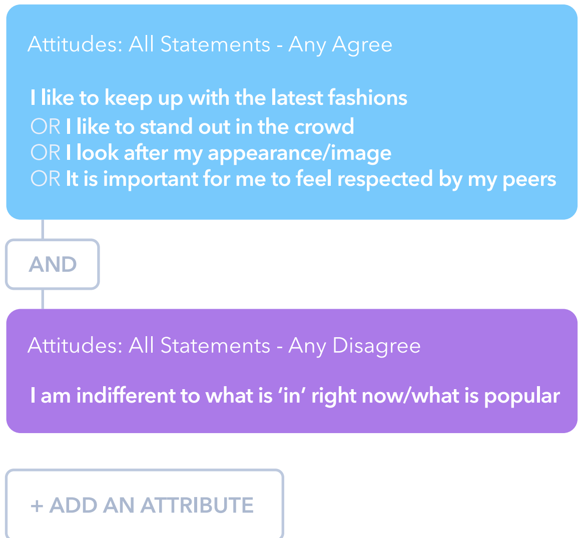
This report explores:

- How do demographic composition, regional variation, and personal values shape an Image-Conscious consumer?
- How do Image-Conscious Consumers navigate the digital space?
- What kind of a relationship do Image-Conscious Consumers have with social media platforms?
- How do Image-Conscious Consumers discover, research and interact with brands online?
- What do Image-Conscious Consumers value in brands, and how do they engage with beauty and luxury brands?

DEFINING IMAGE-CONSCIOUS CONSUMERS

Within the GlobalWebIndex survey, respondents are asked a number of questions about their attitudes and core values. Based on their answers to these questions, we categorize respondents into a number of segments, one of these being 'Image-Conscious'.

To re-create this audience, access Audience Builder in our Platform.



Key Insights

Image-Conscious Consumers are more likely to be female, urban, and affluent. The Asia-Pacific region has a notably higher concentration of internet users who can be categorized as Image-Conscious.

This segment of users is highly tech-connected. Image-Conscious Consumers view the internet and technology as positive tools that enable them to stay connected with other people, and are more inclined to use the internet for personal, professional, and commercial needs compared to the general population.

There is a strong correlation with Image-Consciousness and greater usage of social media. Across global regions, Image-Conscious Consumers spend more time on social media, are more motivated to use social media for various personal and professional reasons, and are more inclined to follow people, organizations, and brands through social media than other internet users.

In the U.S. and Europe, visual and lifestyle-focused social media platforms, such as **Instagram, SnapChat, and Pinterest, are very popular among Image-Conscious Consumers.** This ties in naturally with the importance they place on crafting and maintaining their personal appearance.

A key element in their use of social media is engaging with brands. Much more so than average internet users, Image-Conscious Consumers tend to use social media to follow, like, and view content from brands. Social media is also a key source of information for discovering new brands and products among this group.

Image-Conscious Consumers are more heavily influenced by celebrity culture, especially 'viral' celebrity culture, than average internet users. They over-index in their interest in celebrity news/gossip and reality TV, and are also more inclined to follow viral influencers and bloggers on social media, as well as to trust brand endorsements from both traditional and viral celebrities.

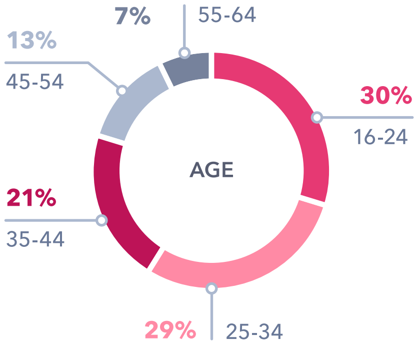
They are a group that can easily be targeted by brands because of their strong propensity to follow trends and their self-professed tendency to buy brands they see advertised. More likely to engage with brands and advocate for brands, these consumers represent an obvious target for developing relationships and fostering brand loyalty.

A brand-conscious segment, these consumers are drawn to luxury. This is especially true when it comes to upscale goods and high-end personal care products, such as luxury fashion and cosmetics.

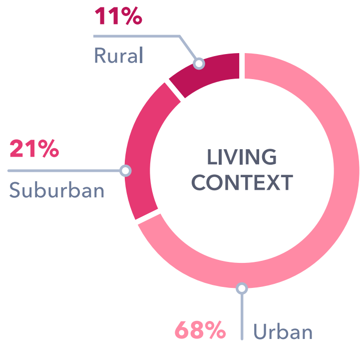
Image-Conscious Consumers

Profiling the Image-Conscious Consumer

Profiling the Image-Conscious Consumer



GENDER



EDUCATIONAL BACKGROUND

Schooling until age 16	7%
Schooling until age 18	38%
Trade/technical school or college	24%
University degree	27%
Postgraduate degree	5%

INCOME

● Online Pop ● Image-Conscious Consumers

	Online Pop	Image-Conscious Consumers
Bottom 25%	24%	22%
Mid 50%	45%	48%
Top 25%	20%	22%
Top 10%	8%	8%
Prefer not to say	12%	9%

GLOBAL REGIONAL BREAKDOWN

● Online Pop ● Image-Conscious Consumers

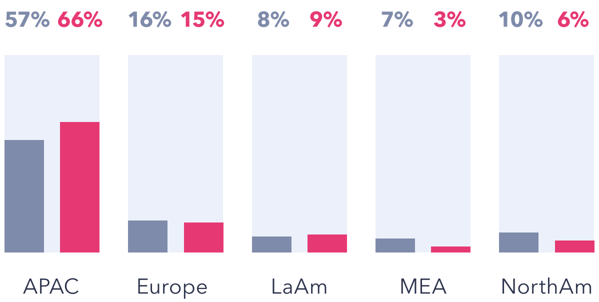


Image-Conscious Consumers are more likely to be female, urban, and higher-income compared to the average internet user. There is also a greater concentration of this segment in Asia-Pacific vs other global regions

Personal Interests

TOP 10 PERSONAL INTEREST AMONG IMAGE-CONSCIOUS CONSUMERS

Interest	%	IDX
Film/movies	56%	
Music	55%	
Food/restaurants/cooking	49%	
News/current affairs	44%	
Health and fitness	43%	1.20
Travel	42%	
Fashion and style	41%	1.52
Books/reading	40%	
Television	39%	
Science and technology	38%	

WHERE YOUNGER GROUPS OVER-INDEX

GEN Z

Interest	%	IDX
Music	64%	1.27
Gaming	46%	1.41
Gadgets	31%	1.23
Photography	33%	1.27

MILLENNIALS

Interest	%	IDX
Health and fitness	46%	1.26
Playing sport	38%	1.28
Personal finance/investment	34%	1.35
Economy/finance	29%	1.24

Image-Conscious Consumers tend to have wide and varied interests, the most common of which are generally consistent with the rest of the internet population, such as film, music, dining out, and travel. However, Image-Conscious Consumers over-index in their interest in areas that coincide with personal image and grooming, like health and fitness (43% of audience/IDX 1.2), fashion and style (41% of audience/IDX 1.5) and beauty products (34% of audience/IDX 1.4).

Beyond the expected interests, variation among Image-Conscious Consumers exists at the generational level as well. Image-Conscious Gen Z'ers show a strong interest in gaming (46%), photography (33%), and gadgets (31%), whereas Millennials in this segment lean more toward professional interests, such as personal finance/investment (34%) and the economy/finance (29%). Image-Conscious Consumers are generally much more invested in celebrity culture than the majority of the global internet population: 21% of this cohort report an interest in celeb news/gossip (IDX 1.4) and 21% report an interest in reality TV (IDX 1.2).

Question: Here is a list of topics that may interest you. Can you please indicate which of these you are strongly interested in? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64; 3,046 Image-Conscious Internet Users aged 16-22; 4,370 Image-Conscious Internet Users aged 25-34.

Lifestyle Indicators

DRINKS CONSUMPTION

% who consume these beverages at least once a month

	%	IDX
Bottled water	80%	1.09
Iced tea	59%	1.11
Energy drinks (e.g. Red Bull, Monster)	48%	1.16
Wine	41%	1.24
Whiskey	35%	1.13
Vodka	31%	1.08
Brandy	25%	1.20
Tequila	20%	1.10
Sparkling wine (e.g. Champagne)	15%	1.25

TRAVEL HABITS

% who take a vacation abroad once a year or more

40% Image-Conscious Consumers

37% All Internet Users

In line with their greater affluence, 4 in 10 Image-Conscious Consumers report taking a vacation abroad at least once per year. They also tend to their health and fitness – nearly 2 in 3 members of this group exercise at least 2-3 times a week or more. Outside of beauty, grooming, and fitness, Image-Conscious Consumers share similar habits with the general population when it comes to most other lifestyle factors, like driving a car or drinking alcohol. However, they tend to over-index in their consumption of ‘occasion’ or more expensive beverages, such brandy (IDX 1.2) and champagne (IDX 1.3)

EXERCISE HABITS

% who engage in physical exercise at the following intervals

Question: How frequently do you drink the following? // How often you do these activities? Take a vacation abroad // How often you take part in physical exercise (e.g. go to a gym, go running, play sport or do other keep-fit activities)? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Image-Conscious Consumers

Online behaviors

Online behaviors

ATTITUDES TOWARD TECHNOLOGY AND THE INTERNET

% of Image-Conscious Consumers who agree with the following statements

	All	IDX	Millennails	IDX	Gen Z	IDX
The internet makes me feel closer to people	68%	1.13	68%	1.14	62%	1.04
It's critical for me to be contactable at all times in my private life	67%	1.20	71%	1.27	63%	1.13
I feel more insecure without my mobile phone than my wallet	60%	1.15	63%	1.23	62%	1.20
Having the latest technological products is very important to me	57%	1.19	61%	1.27	49%	103

INTERNET USAGE MOTIVATIONS

% who indicate the following are 'very important' reasons why they use the internet

Stay up-to-date on news/events	53%
Stay in touch with friends	50%
Research how to do things	49%
Research/find products to buy	49%
Research for work	47%
Education	46%
To get inspired/get ideas	45%
Networking for work	44%
Entertainment (e.g. gaming, films, TV)	37%
Organize my life	33%

Image-Conscious Consumers are highly tech-connected. Much more so than the general population, they identify on a fundamental level with the idea that technology and the internet are positive, core aspects of their lives that bring them closer to people. Much of this sentiment is driven by Image-Conscious Millennials, nearly 3 out of 4 of whom feel that it is critical for them to be reachable at all times, and nearly 2 out of 3 of whom would feel more distressed without their mobile phones than their wallets.

Image-Conscious Consumers consider staying up-to-date on news/events (53%), staying in touch with friends (50%), and researching how to do things (49%) the most important reasons why they go online. While these are quite consistent with the overall population, there are motivations that emerge as more distinctive for Image-Conscious Consumers' internet behavior. These are largely related to the purchase journey, such as 'researching products to buy' (IDX 1.2) or self-expression behaviors, like 'sharing content' (IDX 1.1).

These findings paint a picture of Image-Conscious Consumers as a prime target for brands who activate through digital and social channels in the hopes of sparking engagement and online advocacy amongst their customers.

Question: To what extent do you agree/disagree with the statements below on your outlook on technology and the web? // How important are these reasons for you using the internet? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Online behaviors

The most distinctive patterns in Image-Conscious Consumers' online behaviors emerge around purchasing and online sharing. This segment are more likely than than the average internet user to have purchased a product online in the past month (80%), a figure which jumps up to 84% for Image-Conscious Millennials. In the realm of self-expression, Image-Conscious Consumers, particularly Millennials, are also more likely to have uploaded both photo and video content online.

ONLINE ACTIVITIES

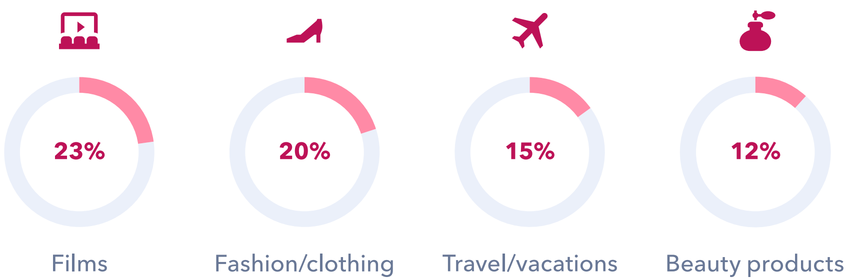
% of Image-Conscious Consumers who have done the following things online in the past month

% ◂ IDX	All	Millennails	Gen Z
Purchased a product online	80%	84%	74%
Uploaded/shared a photo	80%	85%	80%
Uploaded/shared a video	65%	73% ◂ **1.23**	66%
Visited/used a blogging service	59%	65%	65%
Watched a vlog	52%	60% ◂ **1.31**	60% ◂ **1.32**
Used an online dating service/app	42%	48%	44%
Listened to or watched a podcast	39%	46% ◂ **1.30**	39%

When posting online about topics of interest, Image-Conscious Consumers over-index in their discussion of appearance and grooming-related subjects like fashion (IDX 1.4) and skincare/haircare/beauty (IDX 1.4).

ONLINE TOPICS OF CONVERSATION

% who have posted about the following topics online in the past month



Question: In the past month, which of the following things have you done on the internet via any device? // Which of these products, services or topics have you posted opinions about online in the past month? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Image-Conscious Consumers

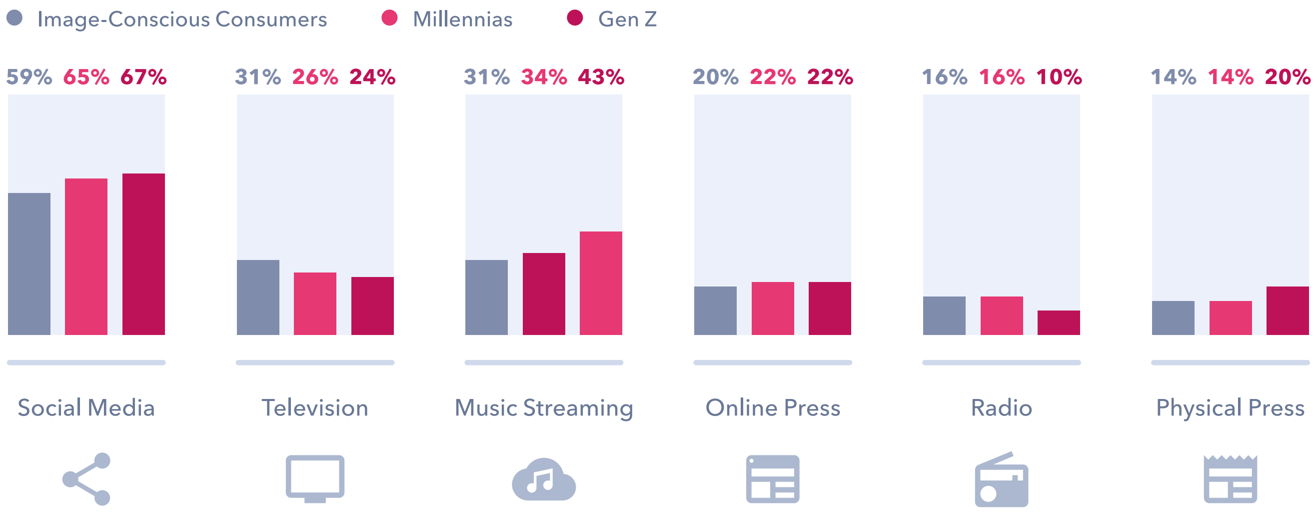
Social Media

Audience Report 2018

Social Media

MEDIA CONSUMPTION PATTERNS

% who are 'High' or 'Heavy' Users of the following types of media



Average time spent on the following per day

3.6 h ON MOBILE

2.6 h ON SOCIAL

Social media is an integral part of digital life for Image-Conscious Consumers. On average, this group of internet users spends about 2.6 hours a day on social media. 59% of Image-Conscious Consumers are considered 'high' or 'heavy' users of social media based on their time spent across various platforms. This is significantly higher than the number of Image-Conscious Consumers who fall into the category of 'high' or 'heavy' users based on their consumption of traditional media, like TV (31%), radio (16%), and physical press (14%). Younger Image-Conscious Consumers are even more invested in social media, with 65% of Millennials and 67% of Gen Z'ers considered 'high' or 'heavy' social media users.

Question: Auto-generated based on time spent on various media // Roughly how many hours do you spend online on a mobile during a typical day? / Roughly how many hours do you spend engaging with/ connected to social media during a typical day? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Social Media

WHY THE IMAGE-CONSCIOUS SEGMENT USE SOCIAL MEDIA

% who use social media for the following reasons

● Image-Conscious Consumers ● All Internet Users

	Image-Conscious Consumers	All Internet Users	IDX
To stay in touch with what my friends are doing	46%	40%	1.16
To fill up spare time	43%	39%	1.10
To find funny or entertaining content	43%	36%	1.18
General networking with other people	38%	33%	1.17
To share photos or videos with others	38%	32%	1.16

IImage-Conscious Consumers are more highly motivated to use social media than the average internet user across the range of possible motivations. Key motivators where this segment over-indexes include using social media for researching products to buy (IDX 1.2), sharing details of a person's life (IDX 1.4), and sharing one's opinion (IDX 1.2). This further reinforces our understanding that self-expression and brand/purchasing needs are two key elements of Image-Conscious Consumers' relationship with social media.

DISTINGUISHING MOTIVATIONS

To share details of what I'm doing in my daily life
IDX 1.36

To follow celebrities/celebrity news
IDX 1.29

To research/find products to buy
IDX 1.24

To share my opinion
IDX 1.23

To stay up-to-date with news and current events
IDX 1.22

To make sure I don't miss out on anything
IDX 1.22

Question: What are your main reasons for using social media? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

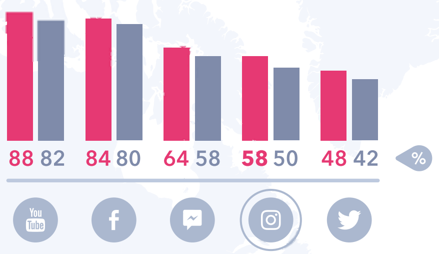
Social Media

MOST VISITED SOCIAL MEDIA PLATFORMS ACROSS GLOBAL REGIONS

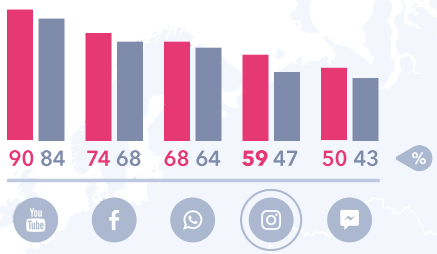
% of Image-Conscious Consumers in each market who have used/visited the following social media platforms in the past month

● Image-Conscious Consumers ● Online Pop

NORTH AMERICA

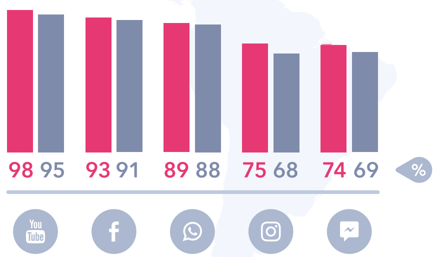


EUROPE

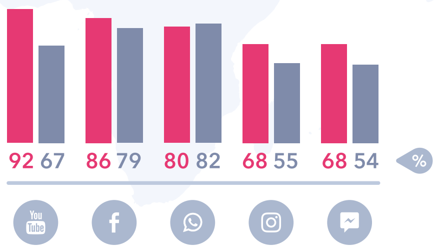


Across all regions, Image-Conscious Consumers visit and use social media platforms more frequently than the rest of the internet population. In the U.S. and Europe, there is a clear preference for visual, lifestyle-oriented platforms like Instagram, Pinterest, and SnapChat among this segment.

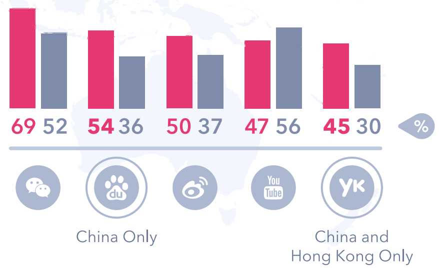
LATIN AMERICA



MIDDLE EAST AND AFRICA



ASIA PACIFIC



Question: Which of the following sites/applications have you visited or used in the past month via your PC/ Laptop, Mobile or Tablet? **Source:** GlobalWebIndex Q2 2018 **Base:** 7,073 Image-Conscious Internet Users aged 16-64 in Asia Pacific; 4,675 Image-Conscious Internet Users aged 16-64 in Europe; 1,270 Image-Conscious Internet Users aged 16-64 in Latin America; 540 Image-Conscious Internet Users aged 16-64 in the Middle East and Africa; 2,013 Image-Conscious Internet Users aged 16-64 in North America.

Social Media

IMAGE-CONSCIOUS CONSUMERS' RELATIONSHIP WITH INFLUENCERS

% of Image-Conscious Consumers who follow the below types of people on social media

	%	IDX
Brands you like	49%	1.29
Actors	38%	1.20
News/media organizations	34%	
Singers, musicians or bands	34%	
Brands you are thinking of buying something from	34%	1.31

	%	IDX
Contacts relevant to your work	33%	
Bloggers	26%	1.21
Sports stars	25%	
Vloggers	20%	1.22
TV Presenters	17%	1.13

Image-Conscious Consumers are generally more likely to follow influencers on social media. This is especially true for influencers with an element of viral celebrity, such as bloggers (IDX 1.2) and vloggers (IDX 1.2). Additionally, the social media - brand/purchasing connection we have seen emerge among many data points holds true in this case, as well; nearly 1 in 2 Image-Conscious Consumers follow brands they like on social media. This is more than the number of those who follow news organizations, musicians, and work contacts.

Question: Who do you follow on social media? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

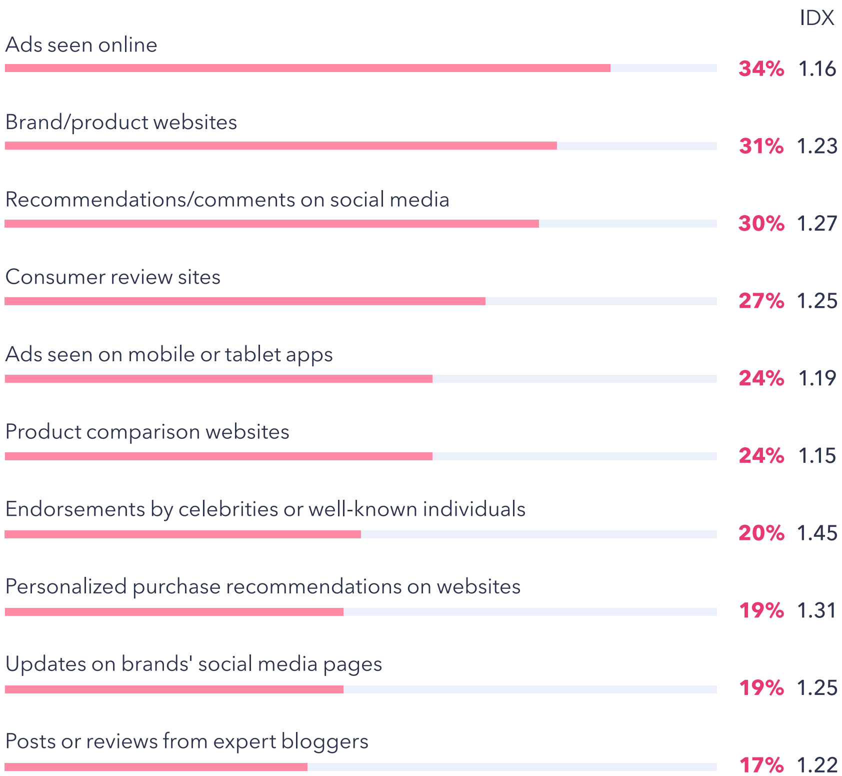
Image-Conscious Consumers

Purchase Journey

Purchase Journey

DIGITAL CHANNELS OF BRAND DISCOVERY

% of Image-Conscious Consumers who report they find out about new brands in the following ways



As a highly tech-connected group, Image-Conscious Consumers are more likely to discover new brands and products through digital channels compared to the average internet user. Online ads and brand/product websites are the most common digital channels for finding out information about new brands and products amongst this group. Social media, however, is also a powerful source of brand discovery for Image-Conscious Consumers, with 30% reporting that they use comments on social media to learn about new brands (IDX 1.3). They are also more invested in celebrity and influencer culture – this is evident in how significantly this group over-indexes in their trust of celebrity endorsements (IDX 1.5) and posts/reviews from expert bloggers (IDX 1.2) to discover brands.

Question: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Purchase Journey

SOCIAL MEDIA AND THE BRAND JOURNEY

% of Image-Conscious Consumers who have taken the following actions on each social media platform in the past month

FACEBOOK

	%	IDX
Visited a company, brand or product's Facebook page	21%	1.06
Researched a product I'm interested in buying	18%	1.13

INSTAGRAM

	%	IDX
Followed a brand or company	14%	1.13
Visited a company, brand or product's Instagram page	14%	1.14

TWITTER

	%	IDX
Looked at the trending topics	12%	1.14
Visited a celebrity's Twitter feed	9%	1.09

ENGAGING WITH BRANDS ON SOCIAL MEDIA

% of Image-Conscious Consumers who have engaged with brands online in the following way within the last month

	%	IDX
Visited a brand's website	61%	1.11
Watched a video made by a brand	27%	1.15
Liked/followed a brand on a social network	27%	**1.23**
Visited a brand's social network page	25%	1.16
Used a social networking "share" button on a website	20%	1.19
Clicked on a promoted/sponsored post on a social network	17%	**1.21**
Read a branded blog	16%	1.14
Clicked on an online ad on the top or side of a website	16%	1.15

By looking at the specific actions that Image-Conscious Consumers take on social media platforms, we can enrich our understanding of how the elements of social media, keeping up with trends, and discovering/purchasing brands are intertwined in the digital life of this group. Image-Conscious Consumers are more likely to **follow brands/companies, visit company/brand pages, view content made by companies/brands,** and share content made by companies/brands vs. the general internet population.

Question: Which of these things have you done within the last month on Facebook/ Instagram/Twitter? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,881 Image-Conscious Internet Users aged 16-64 who Use Facebook; 8,862 Image-Conscious Internet Users aged 16-64 who Use Instagram; 8,024Image-Conscious Internet Users aged 16-64 who Use Twitter

Question: Which of the following actions have you done online in the past month? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Image-Conscious Consumers

Brand Engagement

Brand Engagement

BRAND PRIORITIES

% of Image-Conscious Consumers who agree with the following statements

		IDX
I regularly inform friends and family on new products/services	64%	1.19
I like to keep up with the latest fashions	64%	1.37
I am a brand-conscious person	58%	1.22
I tend to buy the premium version of a product	57%	1.18
I tend to buy brands I see advertised	50%	1.22

Image-Conscious Consumers place a heavy emphasis on maintaining appearances when it comes to their core attitudes towards brands. This is reflected in their agreement that they like to keep up with the latest fashions (IDX 1.4), prefer to buy premium versions of a product (IDX 1.2), and that they are brand-conscious (IDX 1.2). Though Image-Conscious Consumers expect brands to cater to their higher standards of style, they are also the prime target for brand engagement, loyalty, and advocacy. More than other internet users, this group likes to purchase brands they see advertised (IDX 1.2) and also recommend brands or products to friends and family (IDX 1.2).

KEY BRAND VALUES

% of Image-Conscious Consumers who report they want their favorite brands to provide the following things

	All	Millennails IDX	Gen Z IDX	IDX
Provide innovative new products	30%	1.14	1.13	0.98
Make you feel cool/trendy	19%	1.25	**1.28**	**1.59**
Keep you up-to-date with the latest news and products	20%	1.09	1.11	0.86
Provide personalized recommendations for purchases	16%	1.19	**1.31**	1.13
Improve your image/reputation	14%	1.10	1.13	**1.32**

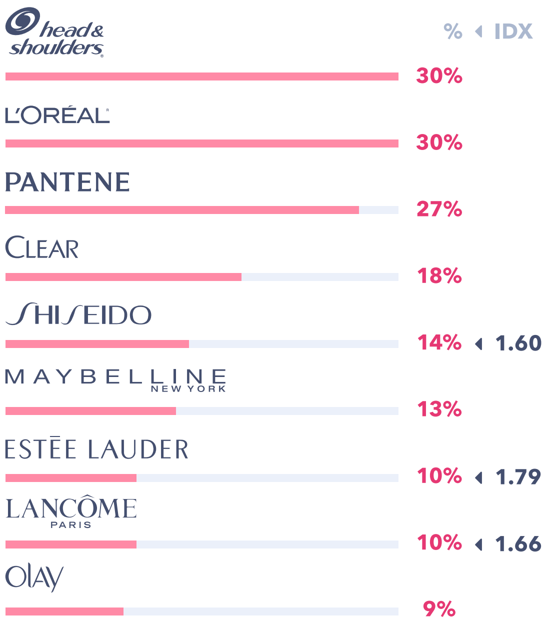
When it comes to what Image-Conscious Consumers truly value in a brand, we see core elements emerge that have been consistent throughout this exploration. Much more than the average consumer, the Image-Conscious group want brands to make them feel 'cool/trendy' (IDX 1.3) - this is especially true for the youngest demographic of the segment, Gen Z. Furthermore, Image-Conscious Consumers place a much greater value than typical internet users on brands that reflect innovation, keep people up-to-date on the latest news and products, allow for personalization, and improve a user's reputation or image.

Question: To what extent do you either agree or strongly agree with the statements below? // Which of these things do you most want your favorite brands to do/provide? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Brand Engagement

TOP BEAUTY AND PERSONAL CARE BRANDS

% of Image-Conscious Consumers who use the following personal care brands at least weekly



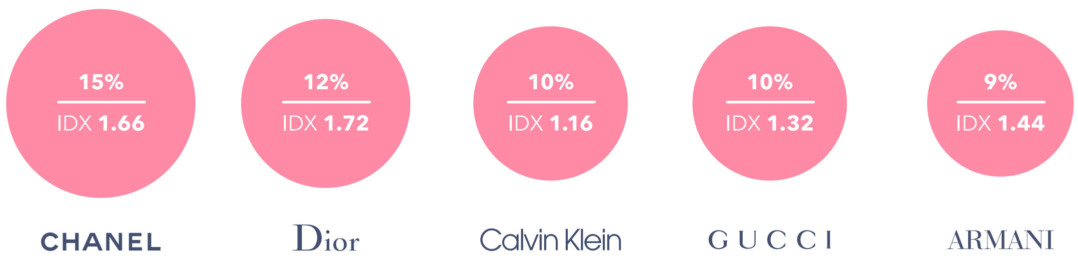
When looking at specific brands, it is evident that Image-Conscious Consumers' purchasing behaviors reflect their overall preference for luxury. They significantly over-index when it comes to buying very high-end brands like Chanel (IDX 1.7), Armani (IDX 1.4), Swarovski (IDX 1.7) and YSL (IDX 1.7). Additionally, Image-Conscious Consumers are more likely to use high-end personal care and cosmetics brands, such as Shiseido, Lancôme, and Estee Lauder.

THE UNIQUE RELATIONSHIP BETWEEN IMAGE-CONSCIOUS CONSUMERS AND BRANDS

More so than the rest of the population, Image-Conscious Consumers have a unique, symbiotic relationship with brands, with each influencing the other as they shape and activate trends. On the one hand, this group of consumers has a strong influence on how brands target and market to their audiences. They're more engaged with brands across multiple media, are more prone to discovering brands through digital channels, make more frequent purchases, and are stronger brand advocates. Despite this active role and impact, there's also a tendency for this group to follow and conform. Image-Conscious Consumers prioritize trendiness, maintaining appearances, and their personal reputation. In order to stay fresh with these elements, they often look to brands and influencers to lead the way. **This cyclical relationship of stimulus and response, where both brand and consumer encourage and react to the other as trends surface and evolve, helps to make this segment an ideal target for cultivating brand loyalty, advocacy, and relationships.**

LUXURY BRAND PURCHASING

% of Image-Conscious Consumers who have purchased the following luxury brands in the past year



Question: Which of these haircare/skincare/cosmetics brands do you use at least once a week? // When did you last make a purchase from these luxury fashion brands? **Source:** GlobalWebIndex Q2 2018 **Base:** 15,571 Image-Conscious Internet Users aged 16-64

Notes on Methodology

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 400,000 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 Q2 2018 wave of research across the following markets, with a global sample of 111,899 respondents. Among this sample, there were 15,571 Image-Conscious Consumers.

	TOTAL	Image-Conscious Consumers
Argentina	1559	199
Australia	2282	202
Austria	1280	142
Belgium	1266	161
Brazil	2345	393
Canada	2268	238
China	15361	4133
Colombia	1301	233
Denmark	1334	135
Egypt	1771	181
France	3323	549
Germany	2846	307
Hong Kong	1766	301
India	4138	390
Indonesia	1788	194
Ireland	1247	124
Italy	2807	423
Japan	1804	296
Malaysia	1556	151
Mexico	2605	445

	TOTAL	Image-Conscious Consumers
Netherlands	1279	90
New Zealand	1275	88
Philippines	1577	180
Poland	1816	329
Portugal	1283	270
Russia	2279	329
Saudi Arabia	1487	113
Singapore	2496	207
South Africa	1528	123
South Korea	1270	256
Spain	2784	439
Sweden	1274	184
Switzerland	1261	161
Taiwan	1796	261
Thailand	1538	127
Turkey	1577	324
UAE	1768	123
UK	7709	708
USA	15637	1775
Vietnam	1618	287

Notes on Methodology: 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

Argentina	77.1%
Australia	90.4%
Austria	86.3%
Belgium	89.0%
Brazil	65.9%
Canada	92.3%
China	58.4%
Egypt	45.2%
France	87.5%
Germany	91.9%
Ghana	45.6%
Hong Kong	91.8%
India	40.1%
Indonesia	32.7%
Ireland	84.0%
Italy	62.1%
Japan	95.8%
Kenya	37.9%
Malaysia	81.2%
Mexico	69.5%
Morocco	59.4%
Netherlands	90.4%
New Zealand	91.6%
Nigeria	32.5%
Philippines	60.8%
Poland	76.6%
Portugal	75.1%
Russia	81.3%
Saudi Arabia	81.3%
Singapore	84.2%
South Africa	60.9%
South Korea	94.5%
Spain	85.2%
Sweden	89.0%
Switzerland	90.6%
Taiwan	81.1%
Thailand	57.8%
Turkey	64.2%
UAE	93.4%
UK	96.1%
USA	79.0%
Vietnam	51.2%

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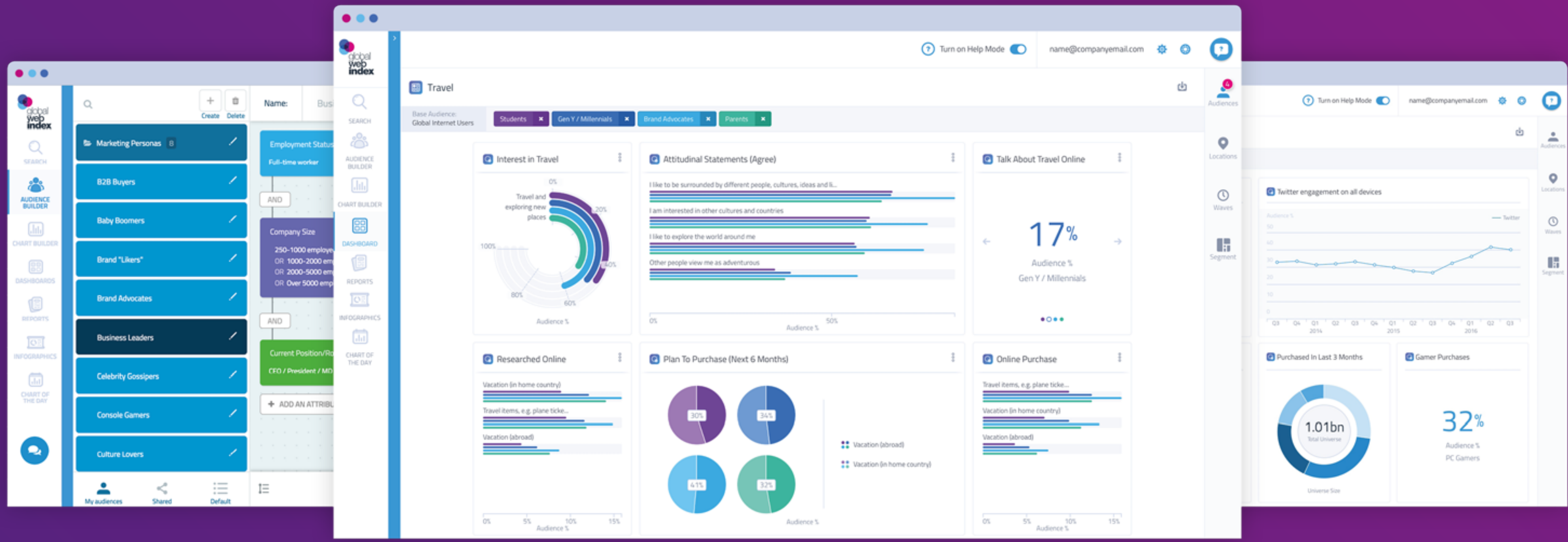

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