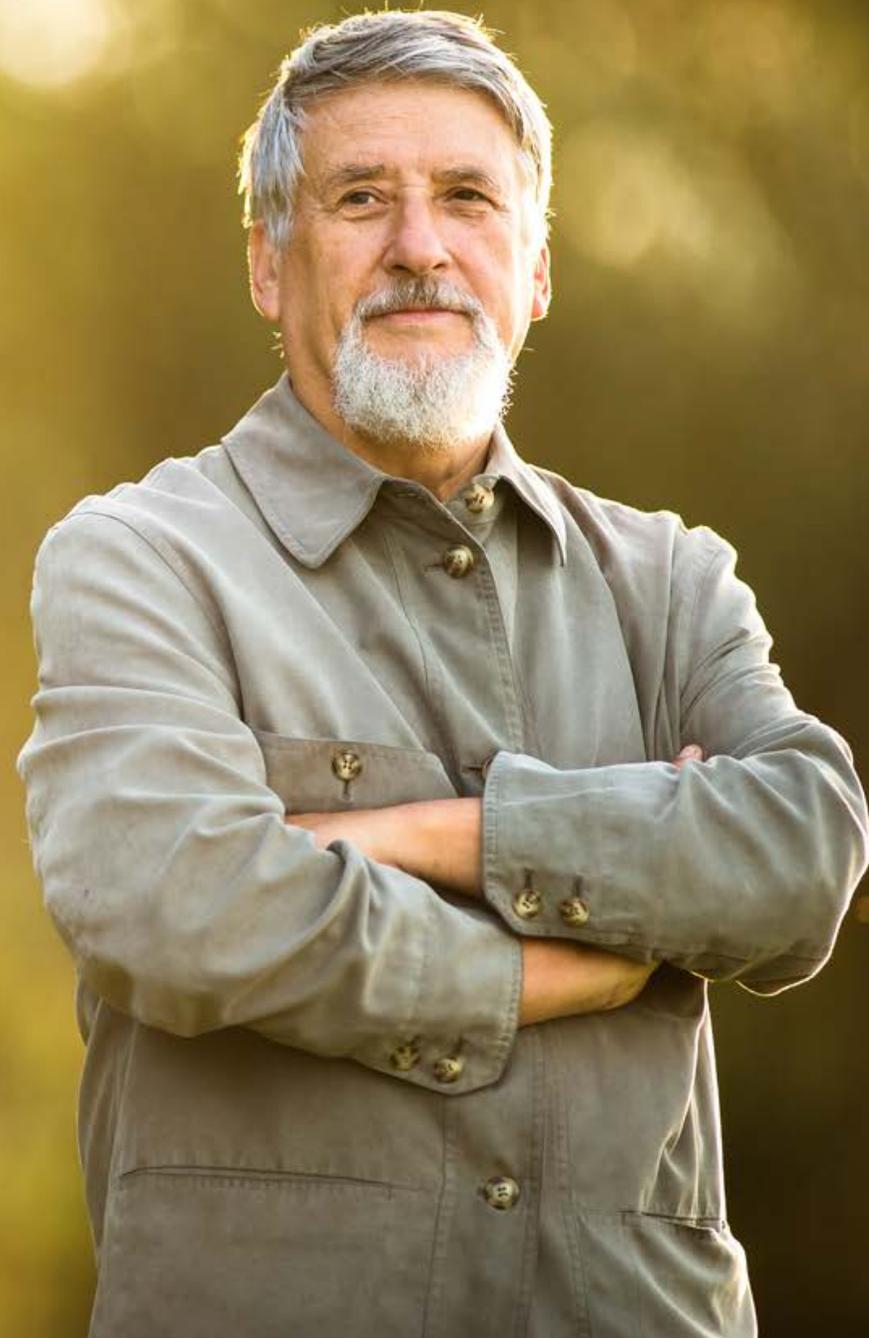


Baby Boomers

Understanding the mature audiences across the world



AUDIENCE REPORT 2019

www.globalwebindex.com

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Introduction

Baby boomers, the generation born between 1944 and 1964, are the largest and most economically well-off generation in developed markets since the largest share of them entered their peak earning years in the late 1980s and 1990s.

Supported by economic upswings, property booms, and generous pension schemes in many countries, their wealth and spending power is unparalleled in the Western world. By 2019, they're more and more likely to be the much sought-after "DINKs" (*dual income, no kids*): Families where both couples are still working, but don't have dependent kids. More affluent boomers, of which there are many, have money to spare and time to do it, whereas younger audiences are becoming established in their families and careers.

And yet, they're often overlooked in favor of millennials – even though millennials **lag behind them in wealth** and spare time. Some brands are highly involved in this market, selling beauty products for mature skin, dream holidays for recently retired companies, health products, home assistance tools, or financial products suited to consumers with more wealth than earnings.

Boomers are online, too. In developed markets, large drops in internet usage don't occur until we look at people in their late sixties and seventies - the oldest boomers and members of the Silent Generation.

AUDIENCE

Respondents in our Core survey are asked 'How old are you?'. In this report, Baby Boomers are defined as internet users who say they are aged 55-64 in 2018 (born 1954-1964).

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

Key Insights

Baby boomers in North America and APAC are the largest affluent group.

In Europe, baby boomers are relatively less well-off, which translates in a more modest lifestyle across the board.

Highly affluent boomers are more likely to be high in wealth than income, because many of them are exiting the job market around age 60.

The vast majority are homeowners, and many own homes outright. Outside their own homes, boomers also show a conservative investment profile compared to younger investors.

They're less likely to think of themselves as affluent, and are more price conscious, though this naturally varies by actual income levels. Service is absolutely key, and offers like easy returns help build confidence.

Baby boomers show less love for brands, consider themselves less receptive to advertising, and there are fewer marketing touchpoints that work well with them. More intensive brand interactions, like joining competitions and social campaigns, are less relevant.

TV is king in entertainment. Not only do they watch more TV than other generations, they're also more likely to actively consider it an interest of theirs. Viewing is also slightly more compressed around prime-time viewing hours than other generations. This is also because they're **much less likely to be using on-demand or subscription services.**

On the other hand, **boomers are research-savvy consumers.** Search engines are a crucial channel, as are review sites and customer feedback they can access. They're more likely to visit brand websites and read newsletters, as well.

70% of boomers have recently used a second screen while watching TV, most commonly their mobile phone. 25% research products to buy, which is only a marginally lower share than younger second-screener. There's great room for TV and search to work together when reaching boomers.

This reflects their generally **information-oriented approach to the internet.** They use it much less for entertainment purposes, much more to find out about products from health to travel. The vast majority have a social media presence, particularly on Facebook, and use it to stay in touch with family.

Baby Boomers

Demographic Context

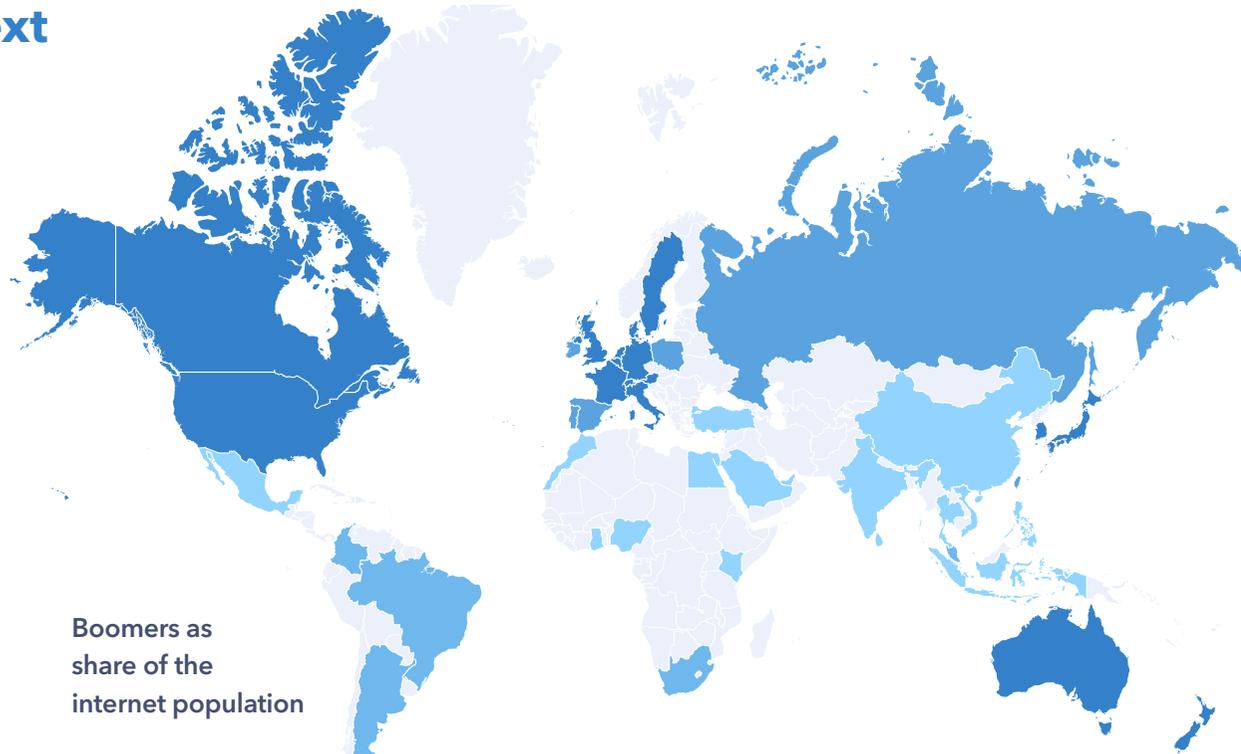
Demographic Context

Geography

More so than other audiences, the gap between developed and emerging markets is particularly strong among internet users who are in their 50s and 60s. Wherever internet penetration is lower, older people are particularly less likely to be online.

Baby boomers are particularly prominent in North America, but markets like Japan, Hong Kong, and Singapore also have above-average shares of older internet users.

Outside the West, China in particular is undergoing a rapid demographic transition. The median age in China went from 19 in 1970 to 37 in 2015, and is set to continue to climb in coming decades. In emerging markets, the older people who do go online tend to have a higher socioeconomic status. Apart from that, emerging markets also have much younger populations overall.



Boomers as share of the internet population

Netherlands	20%	UK	17%	Portugal	13%	Turkey	5%
Japan	20%	Switzerland	17%	Russia	13%	Saudi Arabia	4%
Germany	19%	New Zealand	16%	Argentina	9%	UAE	4%
Hong Kong	18%	South Korea	16%	South Africa	8%	Vietnam	3%
Canada	18%	Australia	16%	Brazil	7%	Egypt	3%
Denmark	18%	Austria	16%	Colombia	7%	Philippines	3%
USA	18%	Italy	16%	Malaysia	6%	India	3%
Sweden	18%	Spain	15%	Mexico	5%	Kenya	2%
Belgium	17%	Poland	14%	Thailand	5%	Ghana	2%
France	17%	Taiwan	14%	China	5%	Nigeria	2%
Singapore	17%	Ireland	13%	Morocco	5%	Indonesia	2%



Question: Current country of residence
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Baby Boomers

Targeting Baby Boomers

Targeting Baby Boomers

Understanding their perceptions

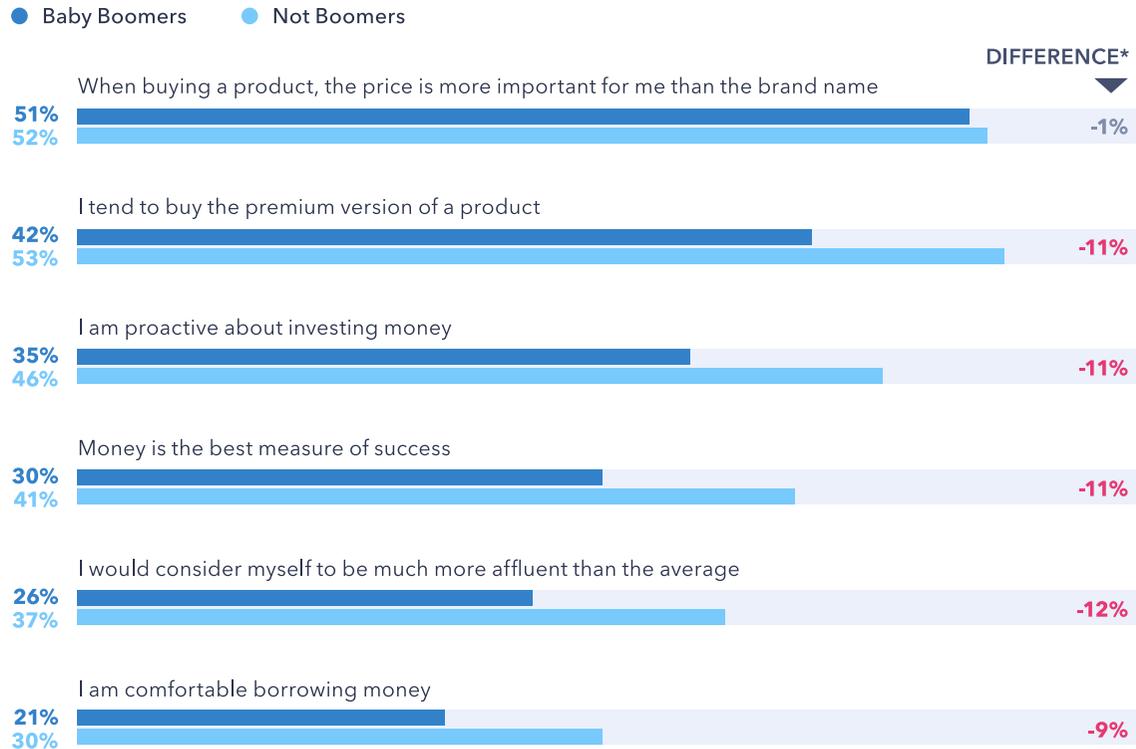
Boomers at different income levels describe their affluence, and approach to investments, differently, but they also share traits that set them apart from others on a generational level. By and large, boomers across income groups are less likely to consider themselves affluent.

They're less likely to think money is the best measure of success, to think of themselves as brand conscious, or to say they respond to advertising. In a nutshell, they're more frugal and less consumerist, even as there are large differences between boomers at different levels of income and wealth.

If we look at just commercially crucial factors, it's clear this is a key challenge, especially for brands that are trying to sell premium products. This applies even to this audience of people who have an overrepresentation of affluent consumers.

Consumer values

% who agree with the following statements



*The difference refers to percentage-points



Question: To what extent do you either agree or strongly agree with the statements below?
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Baby Boomers

Personal Lives

Personal Lives

Lifestyle indicators

% who do the following regularly/semi-regularly

HEALTH AND DIET	APAC	EUROPE	LAT AM	MEA	NORTH AM
Eat out at a restaurant	54%	23%	40%	27%	53%
Drink alcohol	39%	49%	42%	26%	43%
Eat fast food	36%	14%	29%	42%	50%
Go to a gym	27%	14%	23%	32%	17%
Go running / jogging	54%	23%	40%	36%	16%
Other forms of exercise	58%	64%	57%	48%	68%

TRAVEL HABITS	APAC	EUROPE	LAT AM	MEA	NORTH AM
Have a domestic vacation	73%	63%	73%	71%	69%
Stay in a hotel	59%	51%	51%	38%	63%
Have a short-haul vacation abroad	38%	35%	19%	28%	15%
Have a medium/long-haul vacation abroad	32%	24%	16%	19%	16%
Stay in rented accommodation (e.g. Airbnb)	33%	21%	17%	25%	14%
Fly in business or first class	26%	10%	17%	13%	12%

As boomers move into retirement and their children become older and more independent, many will have more time and disposable income to pursue their personal interests through entertainment or leisure activities. For some, like many boomers in North America, that means going out to restaurants and staying in hotels. Others might focus more on staying healthy, like many in APAC do, or traveling abroad, as many in Europe do. This of course varies by geography, culture and personal finances, as would be expected with a cohort of this size.



For more information on our lifestyle segmentation, click on the button above



Question: This data is auto-generated based on responses to the Lifestyle Activities questions **Options:** Regulars, Semi-Regulars **Note:** Respondents do not answer this question directly; their answers to the frequency questions relating to each activity are used to place them into one of these segments. The segmentation does not include respondents who completed the survey via mobile, since they did not answer all of the relevant frequency questions. Drinking alcohol is not asked in Egypt, Saudi Arabia or UAE. In other markets, drinking alcohol is asked to 18+ (except in the USA, where it is 21+; although some other countries have age restrictions on certain 18-20 year-olds buying/consuming alcohol, any respondents in this age group always have the option to say never" **Source:** GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Personal Lives

Nevertheless, there are themes that cut across the generation. Compared to the younger generations, they're more interested in current affairs, hobbies like gardening and matters involving home life, local issues, and factual news (especially local issues), and **markedly less interested in pop culture: celebrities, gaming, sports, fashion.**

This difference in interests has effects on behaviors ranging from how likely they are to find out about brands to what would motivate them to be brand advocates. With less interest in celebrities, which is clear from their motivations to use social media, as well as the top-level interests they report, they're less likely to find out about brands from endorsements.

With the notable exception of North America, entrepreneurship and business are less of an interest, too, which aligns with their winding-down working life.



Real-world issues - news, politics, their homes and neighborhoods - interest boomers more than pop culture.

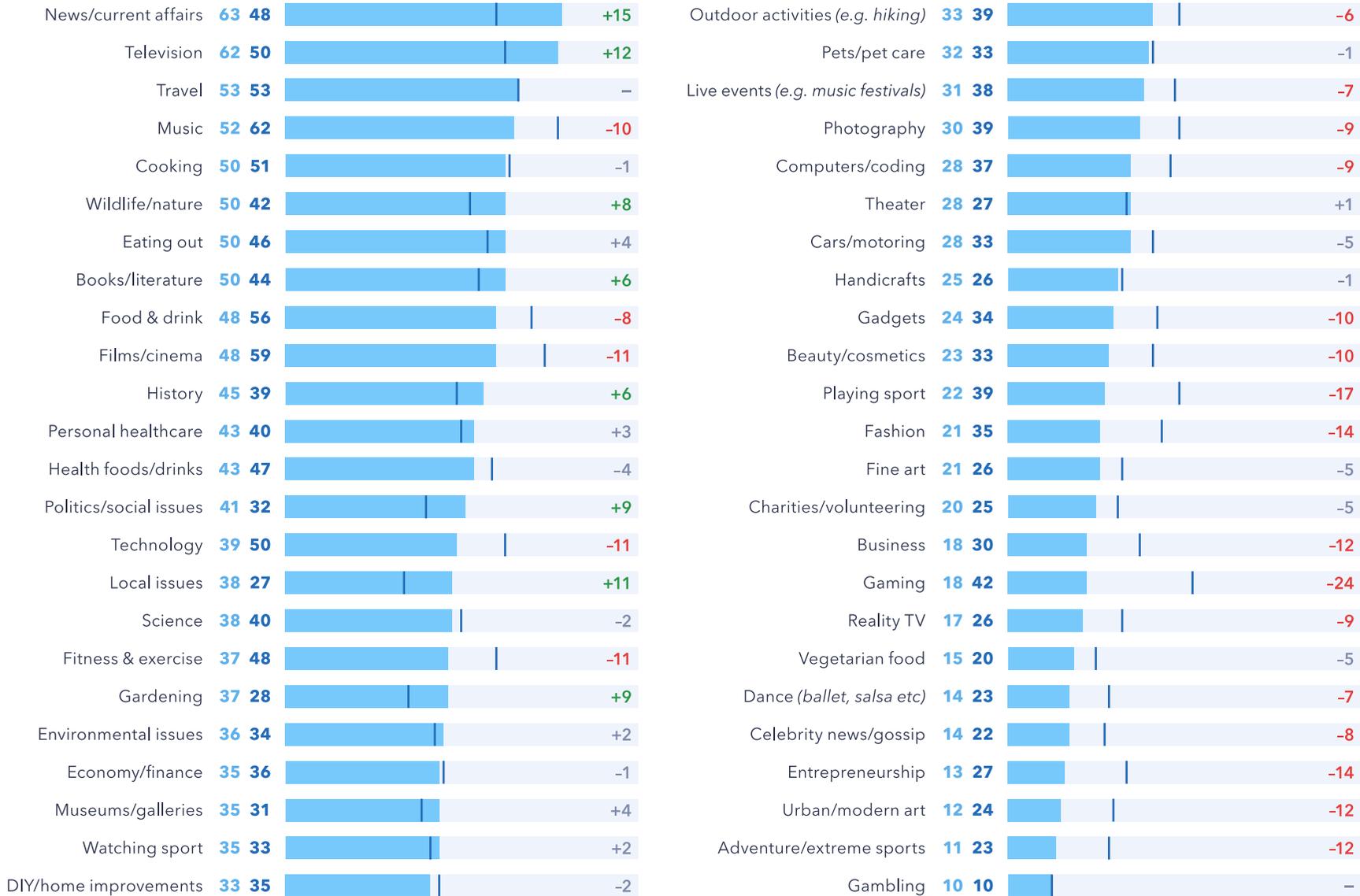


Question: This segmentation is not answered by respondents directly; it is auto-generated based on their responses to the Personal Interests question.
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Personal Lives

How boomers differ | % who say they are strongly interested in the following

● Baby Boomers | Not Boomers



*The difference refers to percentage-points



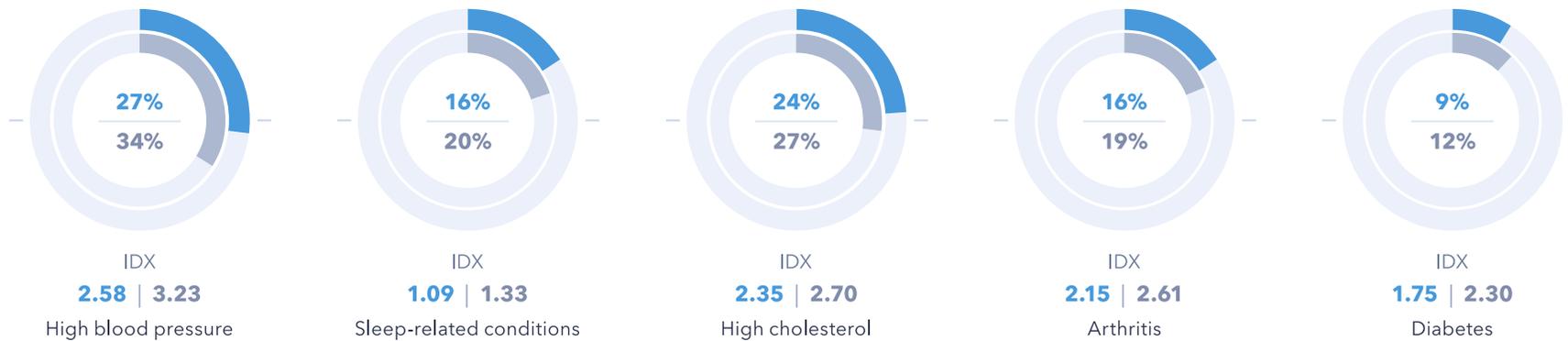
Question: This segmentation is not answered by respondents directly; it is auto-generated based on their responses to the Personal Interests question.
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Lifestyle

Boomer age effects on health condition prevalence

% of different health conditions compared to the average internet user

● Younger Baby Boomers ● Older Baby Boomers



Comparing younger (55-59) to older boomers (60-64) shows that, predictably, the likelihood of having one of the common health conditions tracked by GlobalWebIndex increases as people reach their 60s.

67% of boomers have at least one of the health conditions we track; 44% have at least two, 24% at least 3

High blood pressure, for example, is cited by seven percentage points more of older baby boomers compared to their younger counterparts: a relative increase of almost 70%. Having a mental health or skin-related condition, on the other hand, does not dramatically increase as respondents become older.

Regionally, boomers in North America are older and report having more health issues. In fact, out of 11 health conditions tracked, North America posts the highest figures in eight. Three in 10 boomers from North America suffer from some form of arthritis (Index 4.22), compared to 1 in 10 of those in Latin America or Europe. Only

diabetes, migraines and sleep-related conditions did not have the highest prevalence in this region.

While more boomers are choosing to stay active later in life, there's still a gap between them and others when it comes to regular physical activity. 22% of boomers are interested in playing sports, compared to 39% of non-boomers. That said, approximately 4 in 10 cite fitness or personal healthcare as a personal interest of theirs.

70% of boomers do some weekly exercise to stay healthy.

Regional differences have a big impact on their lifestyle activities. Just 16% of boomers in North America practice running or jogging, for instance, whereas 54% of those in APAC do. Important to note, though, is that nearly 7 in 10 boomers in North America say they regularly or semi-regularly do other forms of exercise outside of going to the gym or running, which is the highest ratio for this data point out of all five regions.



Source: GlobalWebIndex Q3 2018 Base: 7,144 Younger Baby Boomers Aged 55-59, 6,482 Older Baby Boomers Aged 60-64

Baby Boomers

Working Life

Lifestyle

Working life

% of Baby Boomers who say they have the following working status

56% WORKING	GLOBAL	APAC	EUROPE	LAT AM	MEA	NORTH AM
Full-time worker	38%	43%	36%	24%	36%	35%
Self-employed/freelancer	10%	10%	8%	28%	17%	8%
Part-time worker	8%	7%	10%	8%	12%	9%
Retired	30%	28%	32%	26%	20%	33%

44% NOT WORKING	GLOBAL	APAC	EUROPE	LAT AM	MEA	NORTH AM
Unemployed	6%	3%	8%	8%	8%	7%
Other	5%	6%	4%	2%	5%	5%
Full-time parent/stay-at-home parent	3%	3%	3%	4%	1%	2%
Student	-	1%	-	-	1%	-

56% of boomers are still working in some capacity, compared to 69% of the general online population, even if full-time workers only account for 38% of the baby boomer population.

The major cut-off point is at **60 years of age**, after which the percentage of retired boomers jumps from 25% to 37% and the percentage in full-time employment drops to 34%.

This doesn't mean there's a clean break between work and retirement. At 55, where the boomer cohort starts, very few have yet retired, but the shift has begun. Conversely, at age 64, 18% are still either working part-time or self-employed, for instance.

Latin America and the Asia-Pacific region have very high rates of self-employment that reflect economies with relatively large informal sectors and limited public pension provisions. This decade is one that sees major transitions in working and family life.

Boomers on the job market

Boomers who remain full-time workers are more likely to be male (62%), more highly educated (9% have postgraduate degrees), and in the top income quartile (33%). Having just exited their peak earning years, we also find that they are somewhat less likely to be senior managers (1.3x) than middle managers (1.7x), and - notably - less likely to be senior decision makers (0.9x.)



Lifestyle

Work and retirement, year by year

Retirees outnumber full-time workers after the age of 60

● Full-time worker ● Retired



Majority of the younger boomers (55-59) are still working



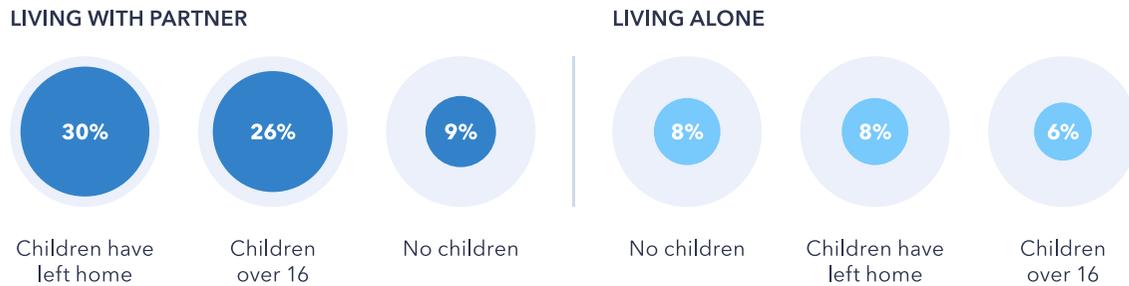
Question: Which of the following categorizations best describes your current working status?
Source: GlobalWebIndex
Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Home Life

Family living arrangement



30% of boomers globally are empty nesters



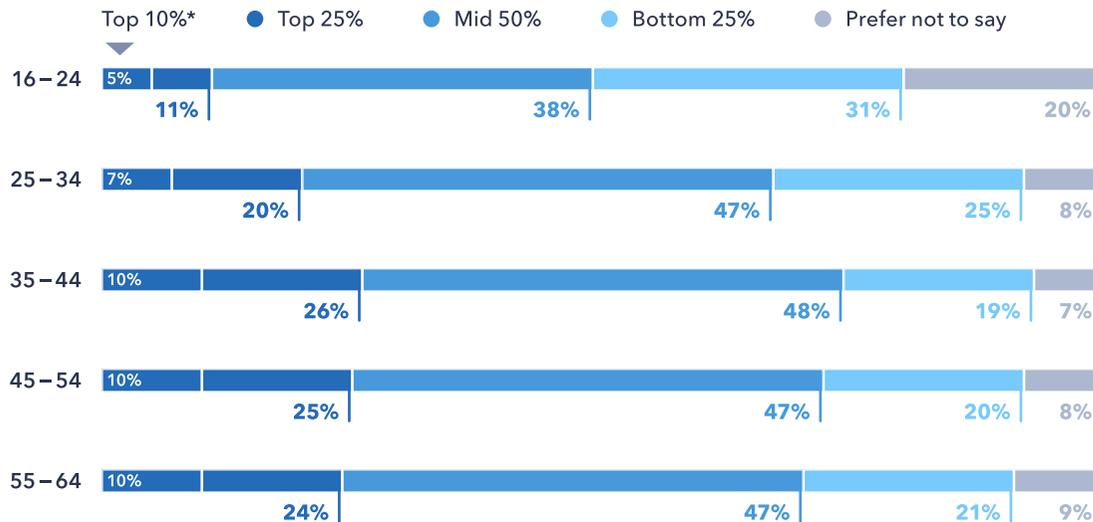
Across the world, baby boomers have families with different sizes and compositions. Most baby boomers are living with their partners (7 in 10 do) and have children (8 in 10). Most commonly, the children have already moved out (30%) or are above the age of 16 (26%). 31% of North American and European boomers are "empty nesters", compared to 16% of Latin American and 31% of Asian.

In North America, just 16% of baby boomers have older children in the household, whereas it's the norm in Latin America (51%.) As boomers' children enter their late teens and move out, their growing self-sufficiency should give boomers more room and time to focus on their own interests.

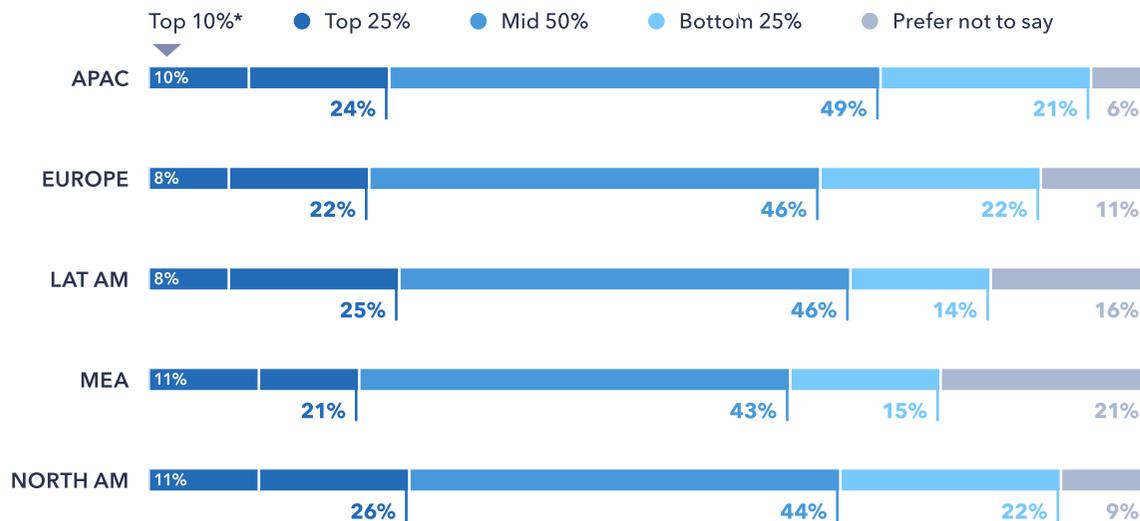


Income

Boomer incomes by age



Boomer incomes by region



As boomers transition into retirement, many also move into a house that better suits their changing family size and differing needs (e.g. downsizing, no longer needing to commute, sources of income changing). Mortgages have increasingly been paid off. Pensions begin to roll in. While they aren't uniformly well-off, they have the same ratio of top earners as people aged 35-53 (24% vs. 25%) and a higher ratio of people with significant wealth, especially outside Europe.

North America has the highest share of high-net worth baby boomers

With four times the likelihood of being high-net worth, boomers in North America are a uniquely important consumer segment. On the other hand, the EMEA region has much fewer affluent baby boomers, which affects their spending, investments and the interests they can pursue across the board.

The United States warrants special comment as the largest and one of the most affluent baby boomer markets. Notably, it differs from other mature markets in the relative youth of its population, but the youngest baby boomers have begun to leave their peak earning years and the oldest began entering retirement in 2011 at the time of reporting.

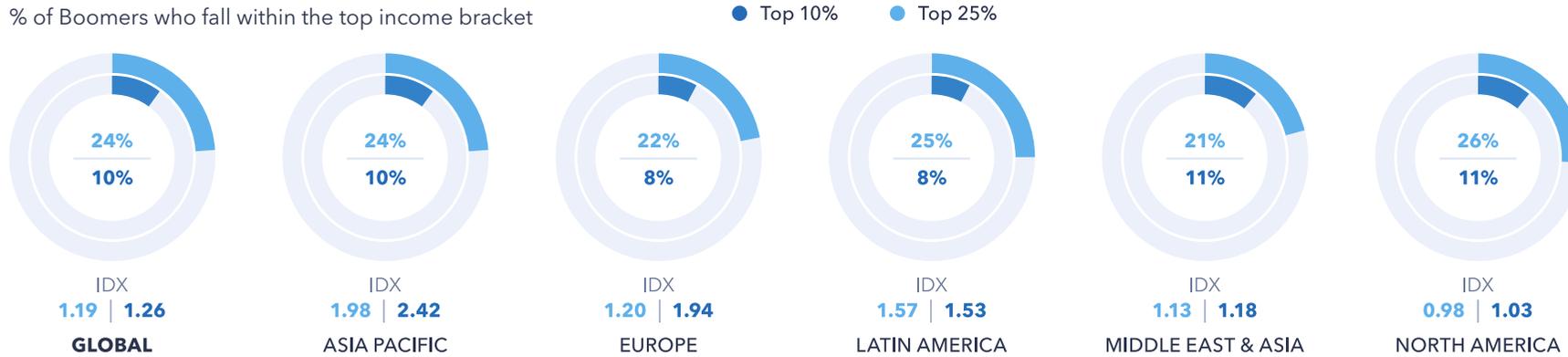
*Note that respondents inside the Top 10% are included in the Top 25% group too.



Savings & Investments

Wealth by region

% of Boomers who fall within the top income bracket



Boomers are much more likely to belong to the highest wealth-holders than to be top income earners, which is to be expected given that many are leaving the job market. The idea of the wealthy boomer is especially well-founded in the English-speaking world, with countries like New Zealand, Canada, Australia, and the U.S. all having more than 30% of boomers in the top quartile in terms of net worth. Conversely, boomers in Latin America, where patterns of employment are much different (notably, much fewer full-time working boomers) count the fewest top asset holders.

Globally, boomers are 60% more likely to be in the top decile and 47% more likely to be in the top quartile in their markets. That doesn't mean that they are all universally well-off, with 17% of people 55-64 having no savings or investments. The U.S. has the largest market of high-wealth baby boomers, but even there, 15% say they have no savings or investments.

Homes tend to be the largest single asset the average baby boomer household owns. Globally, 8 in 10 of them own a house, and 24% of them own their houses outright with no mortgage (1.5 times the general population). Cars, cash savings and pensions, and stocks/bonds are the most commonly held assets.

Baby boomers have a conservative investment pattern and lower risk acceptance

Compared to the average internet user with investments, however, they're more than twice as likely to hold annuities, mutual or managed funds, and real estate, suggesting a more conservative overall investment strategy. They're also much less likely to describe themselves as risk takers, to be comfortable borrowing money, and less likely than the average internet user to say they're proactive with their investments. Usually asset holders have a higher share of self-declared risk takers, but this isn't the case for boomers.

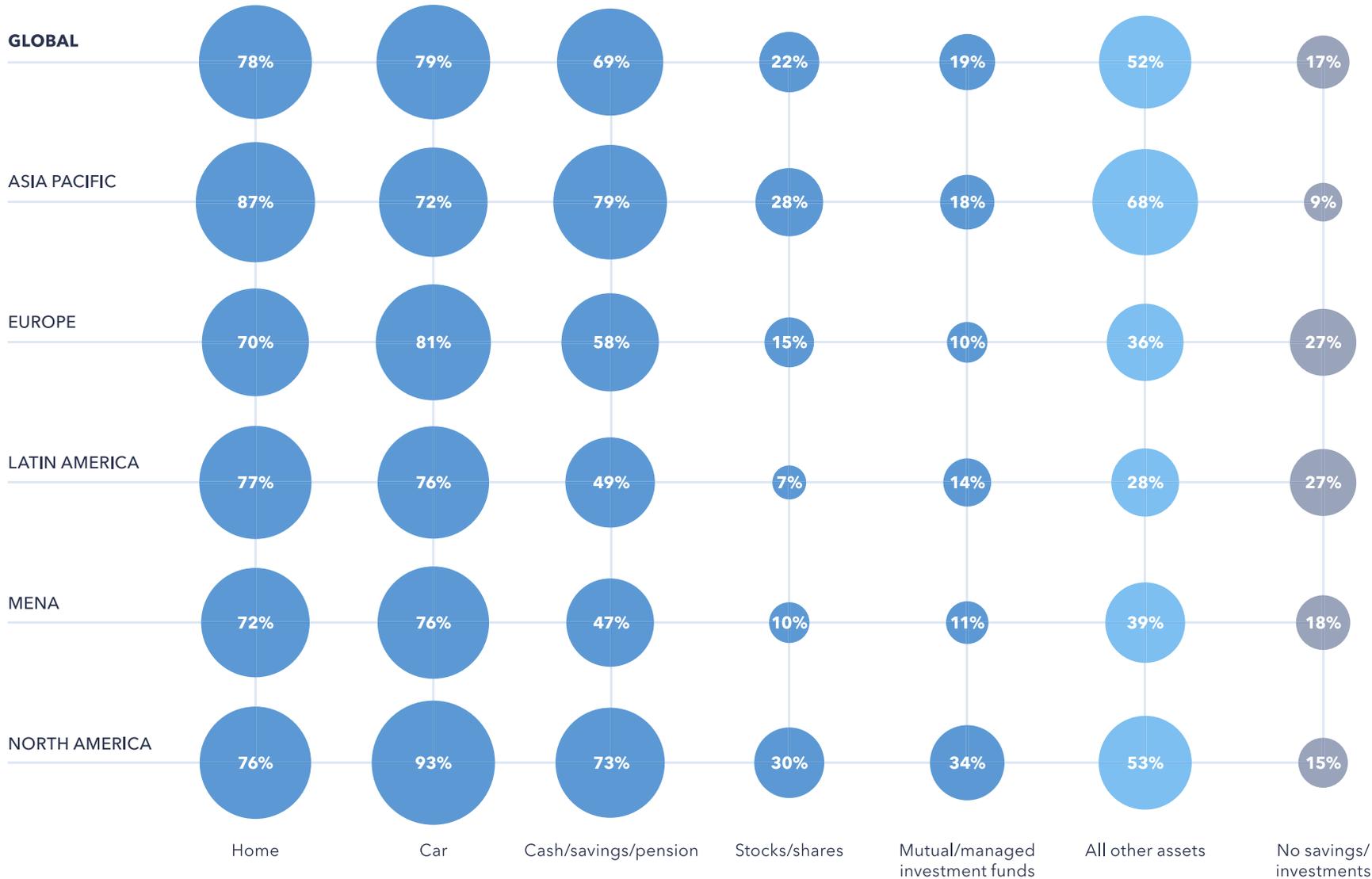


Question: What is your yearly household income before tax or any other deductions?
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Savings & Investments

Baby boomers' assets

% of Boomers who say they own the following asset types



Question: How many cars does your household own? // How many houses / properties do you own? // What kind of savings / investments do you have?

Note: "All other assets" includes Real estate / property (other than the house you live in), annuities, gold, bonds, art / antiques, cryptocurrency, and other

Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Baby Boomers

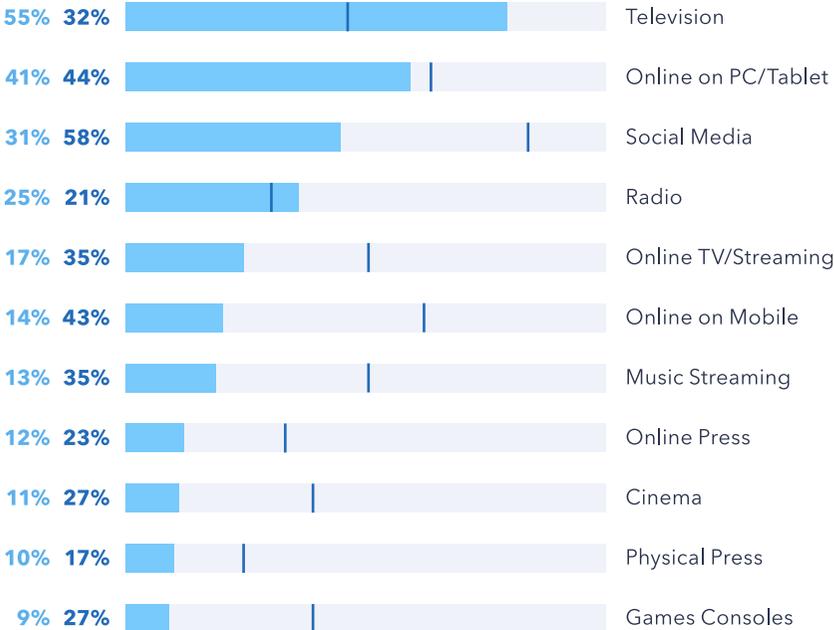
Media & Technology

Media & Technology

Key media among boomers

● Baby Boomers | Not Boomers

% who say they are high/heavy users of the following media



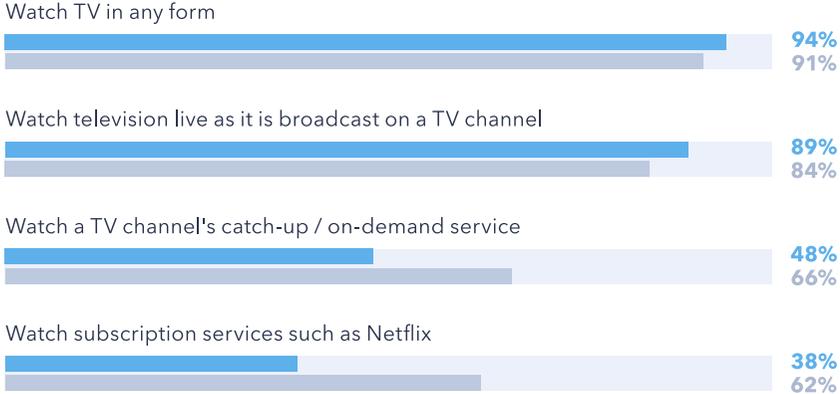
Audiences shouldn't be defined by their generation alone. By and large, people's interests, habits, attitudes and lifestyles - the factors that really matter to marketers - vary more than factors like income, education, and gender.

Media use and technology, however, are areas where we do see strong, specifically *generational* differences. When the internet began to gain mainstream adoption in the mid-to-late 1990s, the youngest boomers were already in their 40s. They have grown up with traditional mass media of the 20th century: TV, radio, print, which has shaped how they're accustomed to accessing information and

TV Habits

● Baby Boomers ● Not Boomers

% of Boomers who say they do the following at least once a month



TV outstrips all other media in its ability to draw baby boomer audiences.

entertainment. Above all, TV is *by far* their most important medium around the world. 55% of boomers are watching TV more than 2 hours per day.

Because they use services like video-on-demand and online TV subscriptions less than other generations, **boomers' TV viewing times are more clustered around prime time**. It also has to do with how central TV has been as a cultural focus point for baby boomers and essential part of everyday life, and further boosts the effectiveness that TV has in reaching this audience.



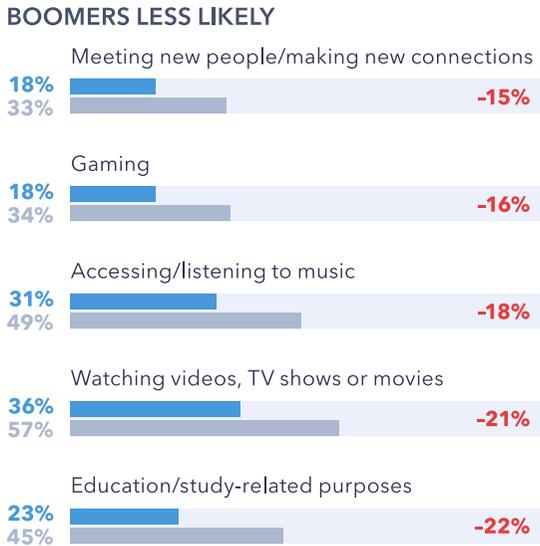
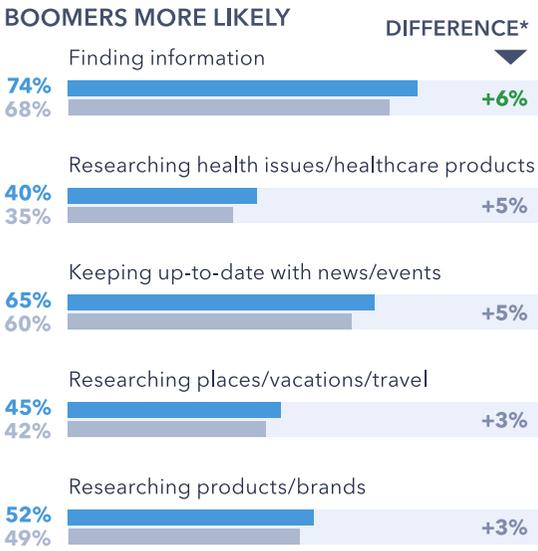
For more information on our lifestyle segmentation, click on the button above



Question: Thinking about television, how often would you say you do the following? This data is auto-generated based on responses to the Time Spent questions
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Media & Technology

How boomers use the internet ● Baby Boomers ● Not Boomers
 % of Boomers who say the following are important reasons for using the internet



Gender differences

MALE DOMINATED DIFFERENCE V. WOMEN*

30%	Business-related research	+12%
22%	Business-related networking	+10%
40%	Managing finances/savings	+7%
66%	Keeping up-to-date with news/events	+3%
19%	Meeting new people/making connections	+3%

FEMALE DOMINATED DIFFERENCE V. MEN*

64%	Staying in touch with friends/family	+12%
46%	Researching health(care) issues/products	+11%
21%	Gaming	+5%
38%	Finding new ideas or inspiration	+4%
53%	Researching how to do things	+4%

“Finding information” as a main motivator for using the internet is cited by three quarters of all baby boomers, compared to 68% of non-boomers. While a large majority (58%) list staying in touch with friends and family too, practical purposes have much more sway with this generation.

Gender makes a large difference in why men and women of this generation use the internet. There are areas where they show a large degree of consensus, but in others, they’re more split. Female baby boomers are more likely to use the internet to stay in touch with friends and family (64 % vs. 52% of men) and to research health issues and healthcare products (46% vs. 35% of men).

For boomers, the internet is much more about practicalities than entertainment

Gaming also stands out - 21% of women in this age group cite this as a reason they go online compared to just 15% of men. The huge popularity of **casual gaming** with older and female consumers has a large impact here. Conversely, men of this age are more likely to use the internet for business purposes, and to manage finances.

*The difference refers to percentage-points



Question: Which of these things are important reasons for you using the internet?
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Social Media Usage

94% have an account with one or more social media platforms, which they use for a similar, albeit narrower, range of activities as other generations.

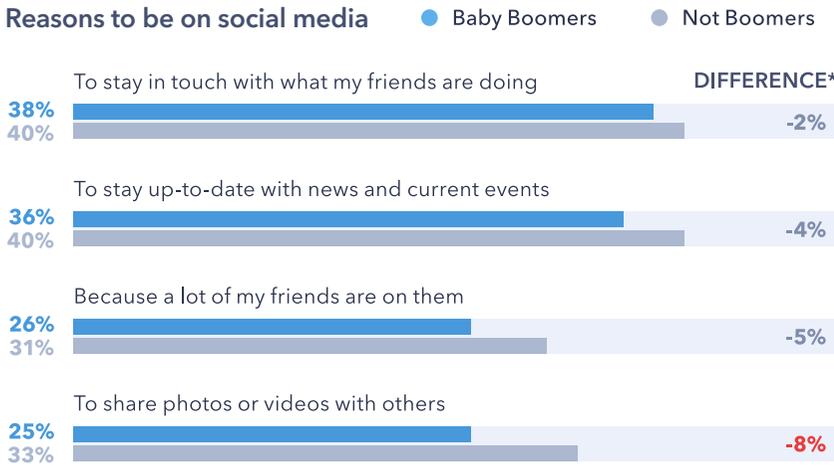
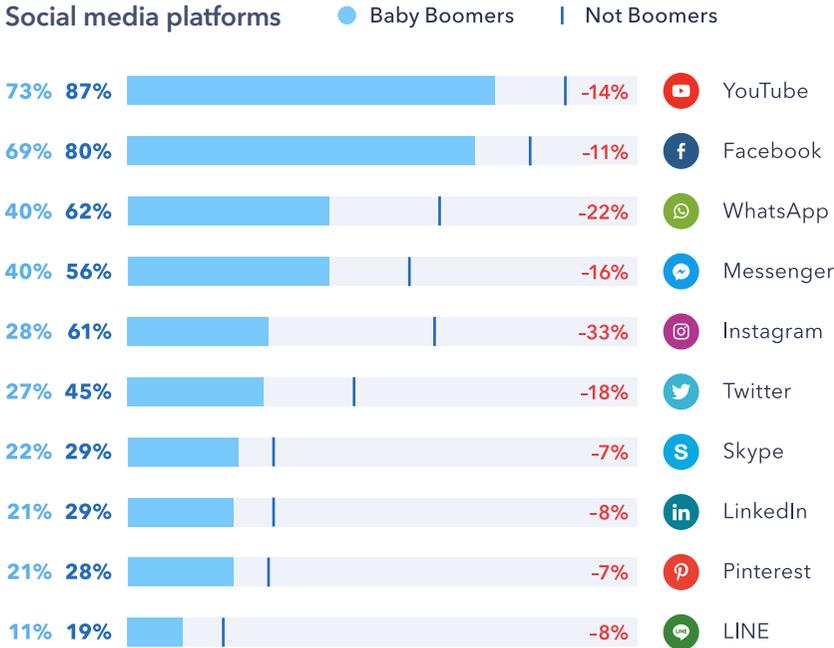
Globally, they spend 1 hour and 43 minutes per day on social media, compared to 2 hours and 30 minutes for non-boomers - but the important thing is that these platforms are fully part of boomers' lives, even if their habits are different.

94% of baby boomers have a social media account, but the range of activities is more limited

Usage is more purposeful and limited. For instance, just 22% say finding funny content is a main reason they use social media. They're also much less likely to use it to fill up spare time, meet new people, or network. The least important reason they cite is following celebrity news and gossip. Again, there's a difference in how baby boomers approach media platforms, and the difference is mainly that they're less interested in pop culture.

From a brand perspective, this presents some challenges. Even if they're using social media, they're far less likely to be engaged with brands across the measures tracked by GlobalWebIndex.

That doesn't mean they won't engage at all, though: 15% of boomers said they have visited a brand's social media page, liked or followed a page (14%), or clicked on a sponsored post (8%). These rates are lower than with non-boomers, but relevant targeting and interest alignment could make the difference. Because many boomers rely on word-of-mouth, social media do matter in research, and they're the fifth most important source of information, even if boomers aren't as engaged with it.



*The difference refers to percentage-points



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 Q3 2018 **Base:** 12,993 internet users aged 55-64 (excl. China)



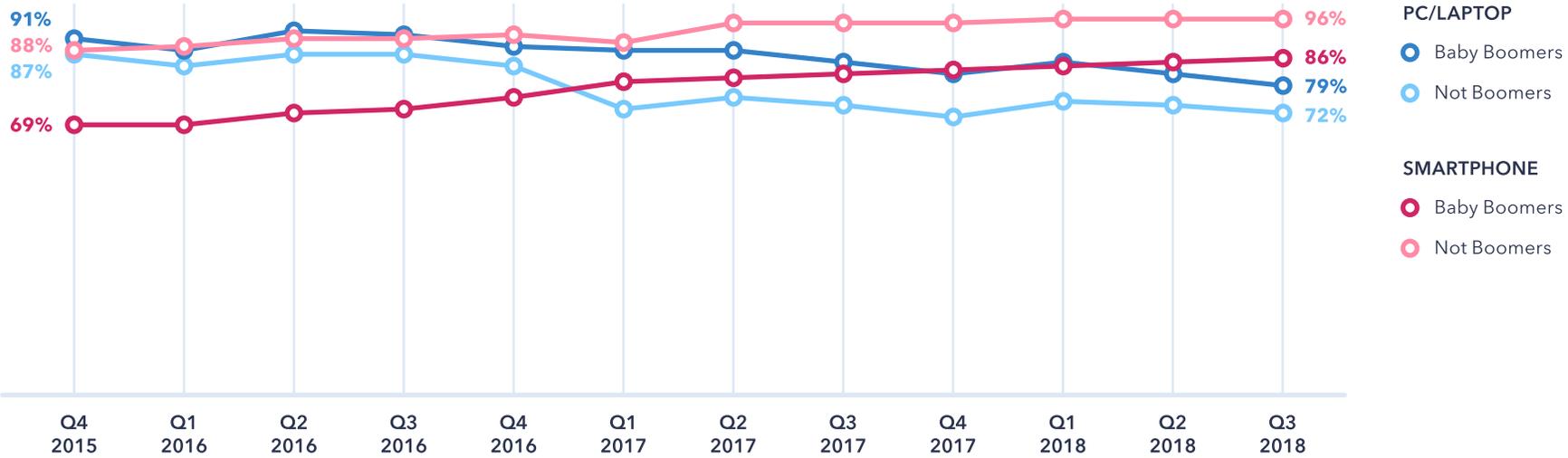
Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Baby Boomers

Device Ownership

Device Ownership

Changing device preferences | Ownership over time
 % of Boomers who say they own the following devices



Baby boomers are much more likely than younger generations to own PCs or laptops

Despite the differences in age and background, baby boomers' device habits are following the same trend as younger generations. There's still a difference in how much they value laptops and bigger-screen units, but it's narrowing year by year.

For instance, just 39% of baby boomers say their smartphone is the most important way they access the internet, compared to 69% of younger respondents -

but this has increased fourfold since Q4 2015. In the same time, smartphone ownership has expanded by 23 percentage points.

There's a 10-percentage-point difference in smartphone ownership between baby boomers (86%) and non-baby boomers (96%)

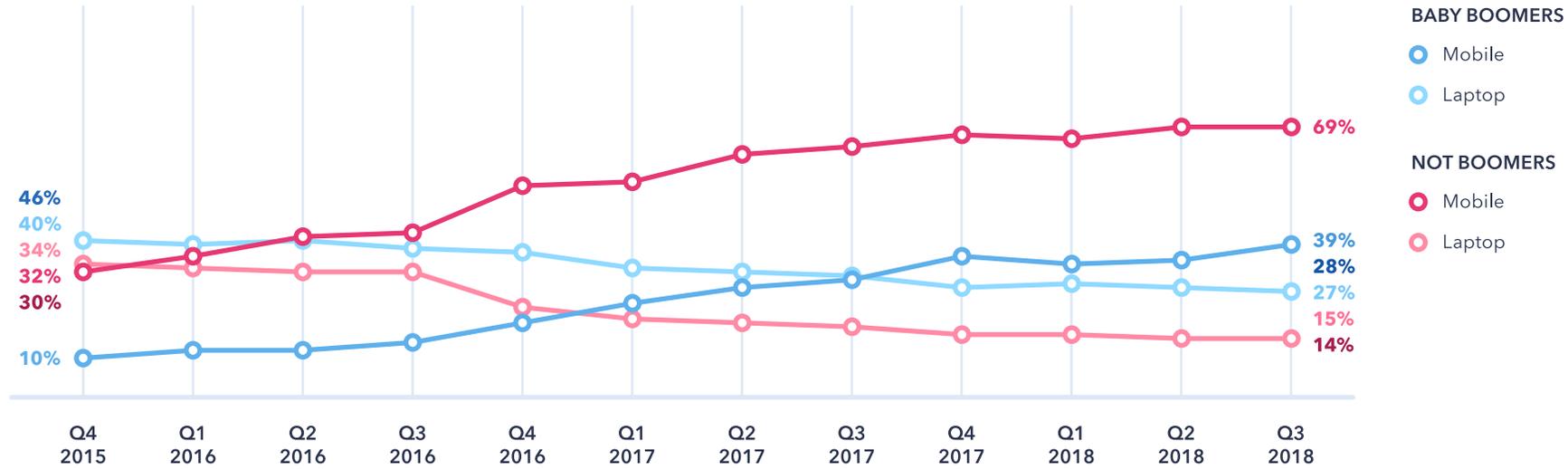


Question: Which of the following devices do you own? // Which of these would you say is the most important device you use to access the internet, whether at home or elsewhere?
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Device Ownership

Changing Device Preferences | Importance over time

% who say the following is their most important device for accessing the internet



Despite tablets generally known for their popularity among older demographics, only 4 in 10 own one globally. They're still an important device among baby boomers in North America, where 51% own one, and to a lesser extent in Europe (47%), but adoption is more sluggish outside those regions.

When we look at more specialized devices and new technology, we see that only 6% own a smart wristband, and 5% own a smartwatch. This could increase in the next few years, as wearable technologies like smartwatches become outfitted with a variety of health features, which industry leaders believe to be especially important to older consumers.

The Apple Watch Series 4, for example, is equipped with enhancements such as electrocardiography (ECG) readings and fall-detection capabilities. As boomers enter more advanced age and these technologies improve in usability and functionality, new technology adoption is likely to grow.



Question: Which of the following devices do you own? // Which of these would you say is the most important device you use to access the internet, whether at home or elsewhere?
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Baby Boomers

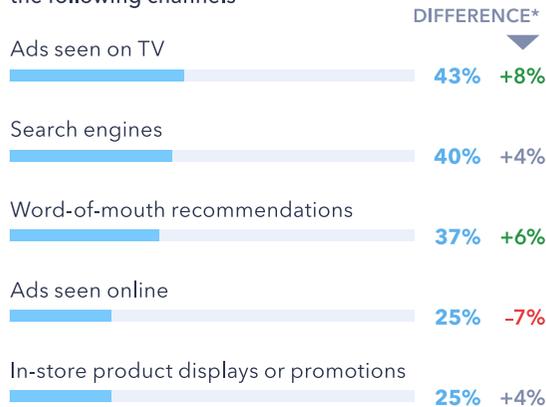
Brand Engagement

Brand Interactions

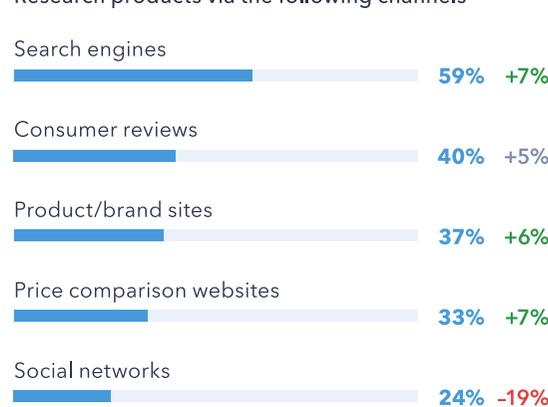
Purchase journey

% of Boomers who:

Discover brands via the following channels



Research products via the following channels



Say the following would increase their likelihood of purchasing a product



*The difference refers to percentage-points

Baby boomers' media habits and different values around consumerism and purchasing naturally influence the channels that matter during different stages of the purchase journey. Crucially, **TV remains the most important channel to introduce new products and brands.**

Search engines come second for discovery and first for research. As we know, the internet is mostly seen as a source of information by many boomers, so search marketing and search engine optimization are crucial strategies when reaching this audience.

There's room to improve brands' ability to bring search and TV strategies more closely together. Second-screening, which is known to make TV advertising more effective, is somewhat less prevalent among baby boomers than other consumers. Nevertheless, 70% of boomers used some kind of second screen while watching TV. Mobile units are the most commonly used second screen - 50% have used one recently.

Overall, 17% of boomers search for products to buy while watching TV, and 16% more generally look for information about what they're watching. The 70% of boomers who do second-screen are still somewhat less likely to shop or research while watching TV, but the difference between them and other generations is small (25% vs. 28%).

Their fondness for review sites and comparison websites all speak to this research-heavy approach to consumption. The frugality and risk aversion that many people of this generation exhibit push free delivery, discounts and returns upward in importance compared to younger audiences.

Interestingly, easy checkout is no more or less important to boomers than younger audiences. There are known usability challenges for designing for older consumers, but at this stage in their lives, it isn't a factor they call out in particular.



Question: In which of the following ways are you most likely to find out about new brands, products, or services? // Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? // When shopping online, which of these features would most increase your likelihood of buying a product?

Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

Brand Interactions

What they want from brands

% who say they most want their favorite brands to do the following	*DIFFERENCE FROM NOT BOOMERS
30% Make you feel like a valued customer	+6%
29% Produce eco-friendly products	+6%
28% Improve your knowledge and skills	+2%
28% Help you to simplify/organize your daily life	+6%
26% Provide innovative new products	+1%
25% Keep you up-to-date with the latest news and products	+8%
8% Give you the chance to customize/personalize products	-6%
8% Make you feel cool/trendy	-9%
7% Provide entertaining videos/content	-6%
7% Improve your image/reputation	-6%
7% Let you contribute ideas for new products/designs	-3%
4% Connect you with other fans of the brand	-3%

As with other consumers, high quality products are the most cited motivator for brand advocacy among baby boomers. There are significant differences between them and younger generations, though. They're much more receptive to direct incentives. Service ranks higher, whereas more emotional and personal motivators - factors like love for a brand, involvement, or exclusivity - will enlist much fewer baby boomers as brand advocates.

How to enlist them as advocates

% who say the following would most motivate them to advocate their favorite brand online	*DIFFERENCE FROM NOT BOOMERS
48% High-quality products	-
47% Rewards (e.g. discounts, free gifts, etc)	+5%
38% When I've received great customer service	+6%
35% When something is relevant to my own interests	+2%
25% Love for the brand	-10%
15% The feeling of taking part / being involved	-7%
9% Access to exclusive content or services (e.g. music, videos, etc)	-9%
7% When something enhances my online reputation / status	-8%

Just 18% of boomers agree they would buy a product/service simply for the experience of being part of the community built around it - almost half the rate of younger audiences (35%).

Few boomers express emotional connections with brands

Overall, this generation is less on board with consumerist values, are more economical, and less eager to choose brands and products based on prestige factors. Instead, as a cohort, they're more practical or transactional with the brands they engage with.

Ultimately, what most boomers say they really want from brands is to feel valued as customers. It's both the most common and the most distinctive request they voice.

*The difference refers to percentage-points



Question: Which of these things do you most want your favorite brands to do / provide? (Max. 3 answers)
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64



Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q3 2018 **Base:** 13,626 Internet Users aged 55-64

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 550,000 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 GWI 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 GWI'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 Q3 2018 wave of research across 44 countries, which had a global sample size of 113,932 respondents. The sample by market breaks down as follows:

Argentina	1,573	Morocco	1,000
Australia	2,346	Netherlands	1,276
Austria	1,303	New Zealand	1,287
Belgium	1,276	Nigeria	1,000
Brazil	2,381	Philippines	1,508
Canada	2,321	Poland	1,856
China	15,921	Portugal	1,297
Colombia	1,323	Russia	2,287
Demark	1,293	Saudi Arabia	1,505
Egypt	1,754	Singapore	2,563
France	3,292	South Africa	1,547
Germany	2,889	South Korea	1,289
Ghana	1,000	Spain	2,881
Hong Kong	1,889	Sweden	1,287
India	4,157	Switzerland	1,286
Indonesia	1,773	Taiwan	1,830
Ireland	1,264	Thailand	1,562
Italy	2,870	Turkey	1,610
Japan	1,731	UAE	1,784
Kenya	1,000	UK	7,869
Malaysia	1,575	USA	16,125
Mexico	2,667	Vietnam	1,612

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

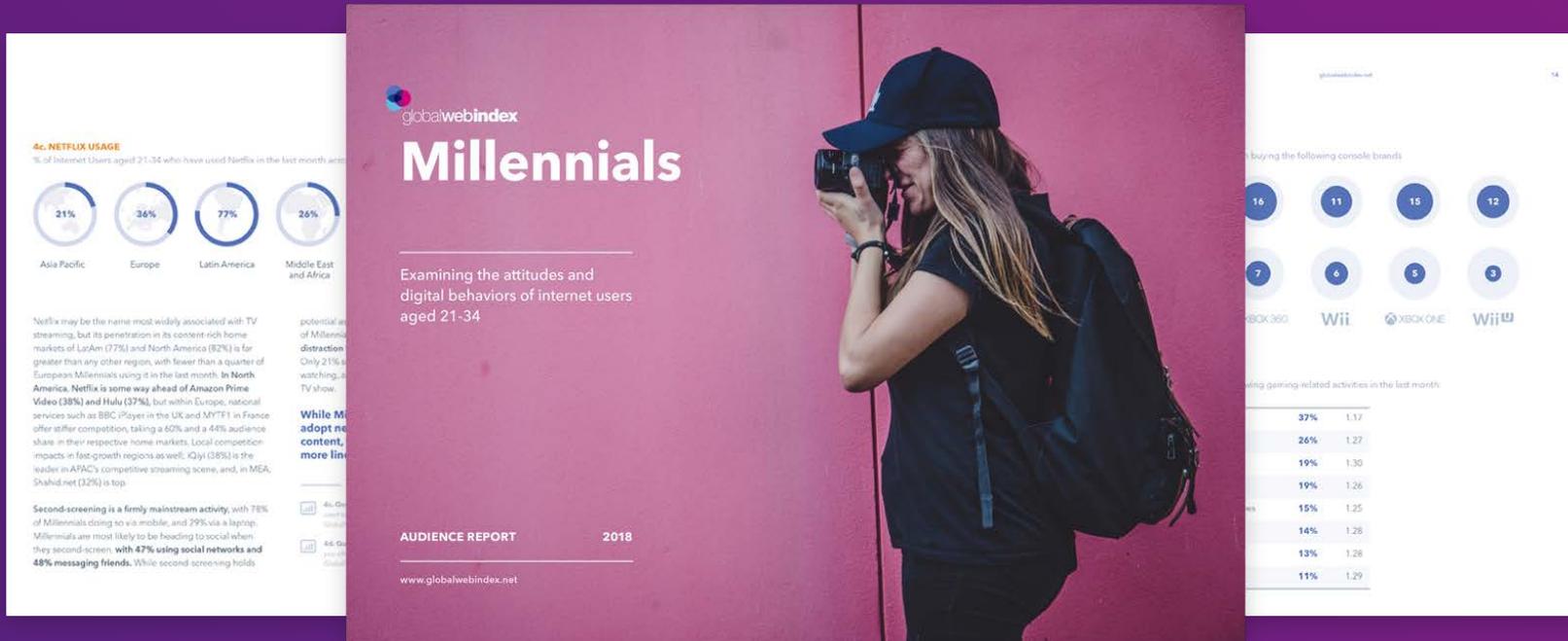
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

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

ITU Internet Penetration Metric 2018

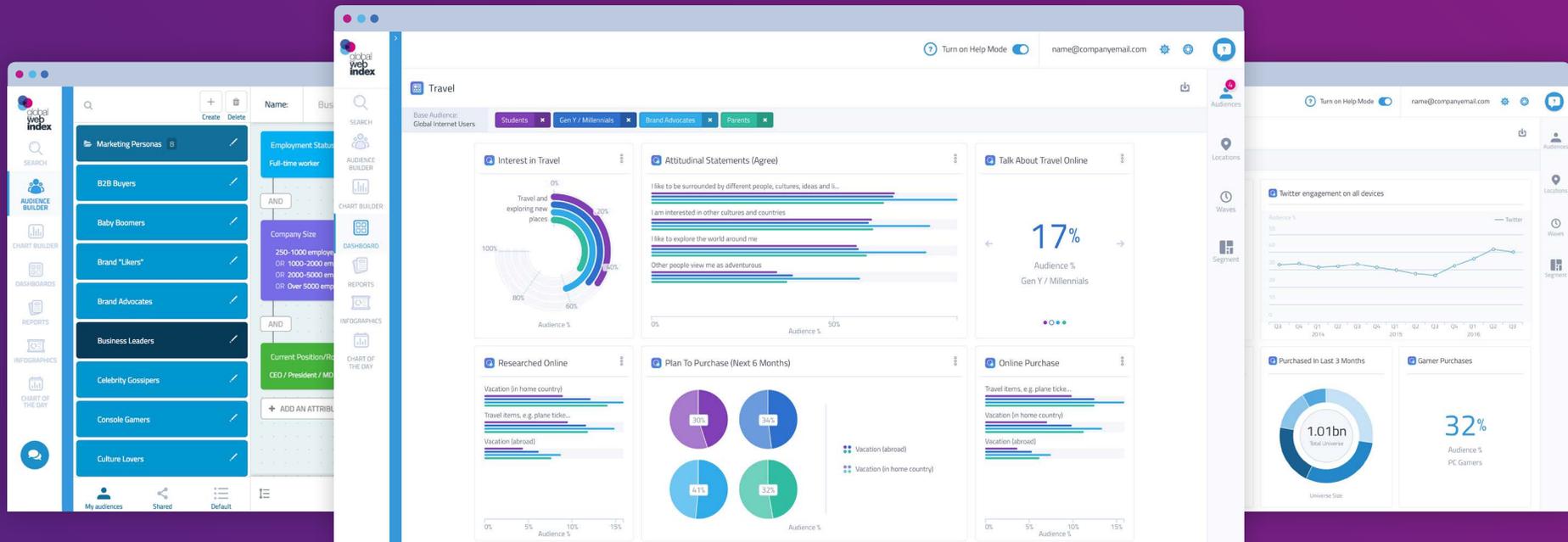
Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.3%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Colombia	62.3%	Netherlands	90.4%	Taiwan	81.1%
Denmark	98.3%	New Zealand	91.6%	Thailand	57.8%
Egypt	45.2%	Nigeria	32.5%	Turkey	64.2%
France	87.5%	Norway	98.1%	UAE	93.4%
Germany	91.9%	Philippines	60.8%	UK	96.1%
Ghana	45.6%	Poland	76.6%	USA	79.0%
Hong Kong	91.8%	Portugal	75.1%	Vietnam	51.2%
India	40.1%	Romania	65.9%		
Indonesia	32.7%	Russia	81.3%		



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