Business Leaders

Examining the digital and professional lives
of executives and senior managers aged 25-64

AUDIENCE REPORT 2019

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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 audiences in question compare to the overall internet population. In this report, we place the spotlight on **business leaders.**

This report focuses on:

01 **Profiling Business Leaders** – from their demographics to their attitudes and lifestyles, what are the defining characteristics of this group?

02 **Device Usage** – what devices does this group use in their personal lives and in the workplace?

03 **Social Media Behaviors** – what are business leaders' favorite social media platforms and how do they use social networks at work?

04 **Purchase Journey in the Workplace** – how does this audience discover new products and research brands in the B2B space? What is the role of social media in the path to purchase?

METHODOLOGY

The data in this report is taken from GlobalWebIndex's ongoing global Core research among 575,000 internet users aged 16-64 in 45 markets. Where clearly stated, this report also draws insights from GlobalWebIndex's Work research among knowledge workers aged 16-64 across 10 markets. Knowledge workers are defined as anyone who holds an office position and/or works with data, analyzes information or thinks creatively in a typical work week. For an in-depth explanation of GlobalWebIndex's Work research and methodology, including information on our country coverage, sample structures and internet penetration rates, please **click here.**

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the average internet user or the average knowledge worker. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

DEFINING BUSINESS LEADERS

In our Core research, business leaders are defined in terms of job role from top leadership – CEOs, presidents, managing directors and the C-suite, down to senior managers. We have based the analysis only on full-time workers and respondents aged 25-64 to focus on more experienced leaders. This definition rendered a sample of 7,386 business leaders aged 25-64 across 41 markets.

In our Work research, business leaders are defined in terms of job role from top leadership – executive management (president/partner, CEO, CFO, C-Suite), down to senior management (e.g. Executive VP, Senior VP). We have based the analysis only on full-time workers and respondents aged 25-64 to focus on more experienced leaders. This definition rendered a sample of 1,977 business leaders aged 25-64 across 10 markets.

Key Insights

Business leaders are an affluent and cosmopolitan group.

This consumer segment represents 7% of the global online population, with the majority being highly-educated males in their late thirties. They're more than twice as likely to be in the top 25% income bracket and nearly all of them have savings or investments. Business leaders are also regular travelers for both personal and professional purposes, but personal vacations are still more common among this audience.

They are a highly connected group of early tech adopters.

Business leaders keep a broad device portfolio and make sure they have the latest gadgets available on the market. They're used to upgrading their smartphones much quicker than the general population and show above-average rates of owning smart devices like smartwatches, smart home products, and smart wristbands. Smartphones and laptops are core devices in the workplace.

Facebook is the go-to platform in the workplace.

Although YouTube is vastly used in business leaders' personal lives, Facebook emerges as the most popular social network at work; almost 7 in 10 say their company has an account, which is primarily used for active engagement with customers like sharing general updates and communicating directly with them.

Business leaders value expert opinion when they research products at work.

This audience is more likely to turn to traditional sources for information once they've discovered the brand. More than half of them say that recommendations from industry analysts and user reviews are the most influential when they're researching new products for business purposes. B2B brands targeting business leaders need to ensure that their messaging leads with expert analysis and testimonials to win trust, and that their products are marketed by trusted voices in the industry.

When it comes to purchasing a product in the workplace, ease of use is more important than the price.

Ease of use is by far the most important purchase influencer for business leaders buying a new technology or software product. This varies by age though. Despite generally being down the list of purchase influencers, cost reduction and security are the features that would most entice older business leaders to purchase a product.

01

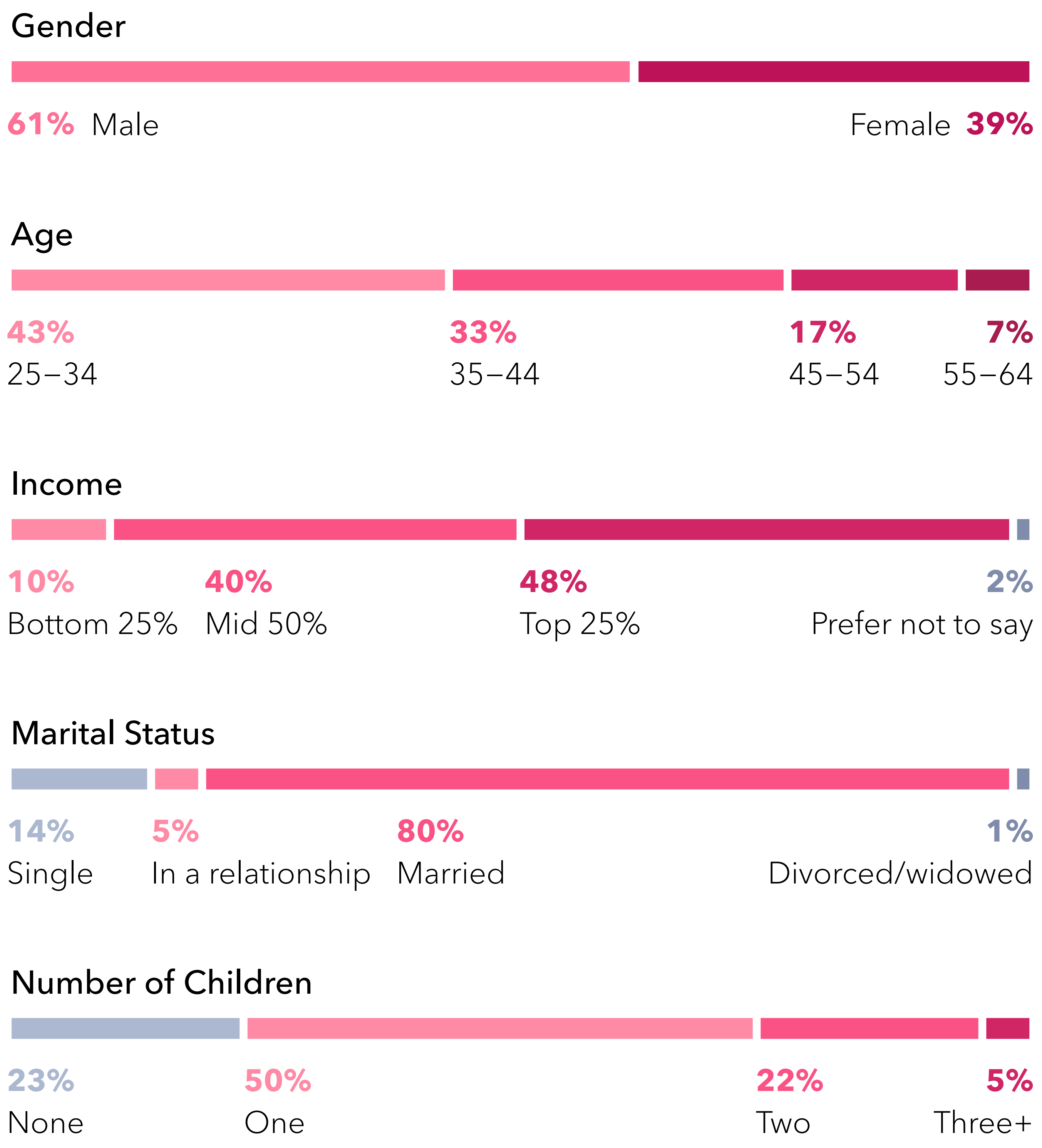
Business Leaders

Profiling Business Leaders

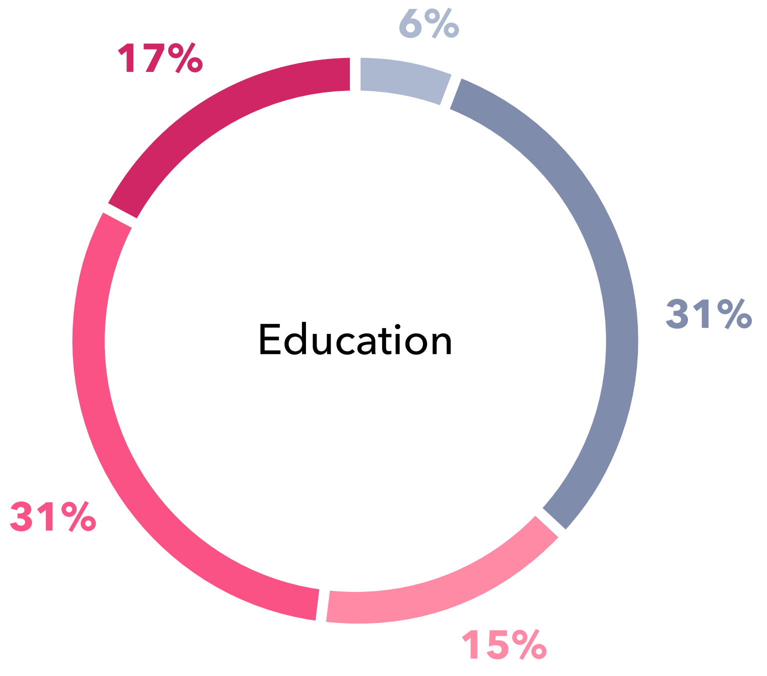
Profiling Business Leaders

PROFILING BUSINESS LEADERS

% of business leaders who fall into the following groups



The average business leader is 38 years old in APAC, LatAm and NorthAm, 39 in MEA and 41 in Europe



- Schooling until age 16
- Schooling until age 18
- Trade/technical school/college
- University degree
- Postgraduate degree

Female Business Leaders

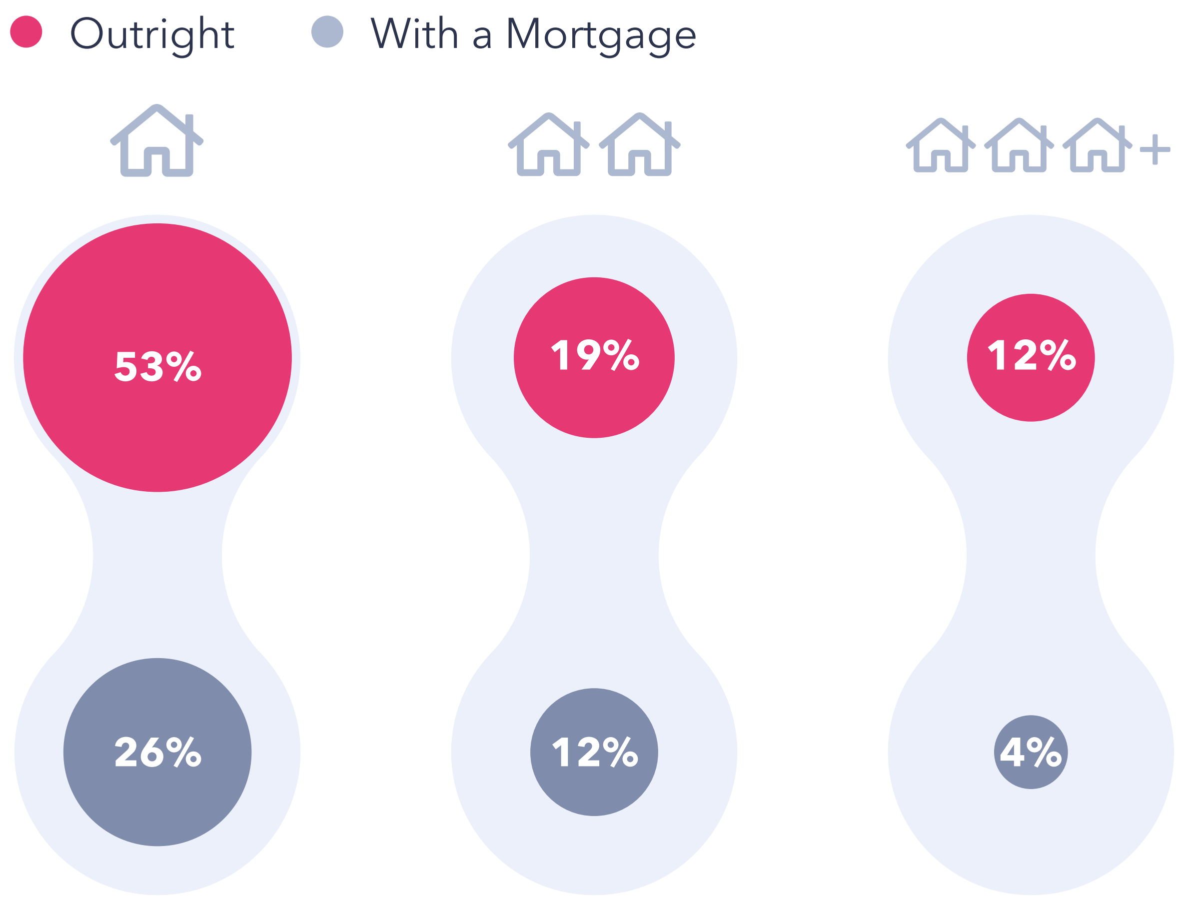
Almost 4 in 10 business leaders today are women. They're around the same age as their male counterparts (38 years old on average), but females are slightly less likely to be educated to a postgraduate degree (15% vs 19%). Nevertheless, they're a very aspirational bunch and 84% of them say they like to challenge and push themselves to be the best they can be in life, compared to 79% of men.

They're most likely working in the technology & communication (30%) and financial services sectors (18%) and 44% of them are the ultimate decision-makers for their company when it comes to purchasing technology or software products. A big gender gap still exists when we look at the final say in terms of purchase approval though; only 38% of female business leaders say they have influence over approving the purchase compared to 46% of their male counterparts.

Profiling Business Leaders

PROPERTY OWNERSHIP

% of business leaders who own a property...



BUSINESS LEADERS ARE...

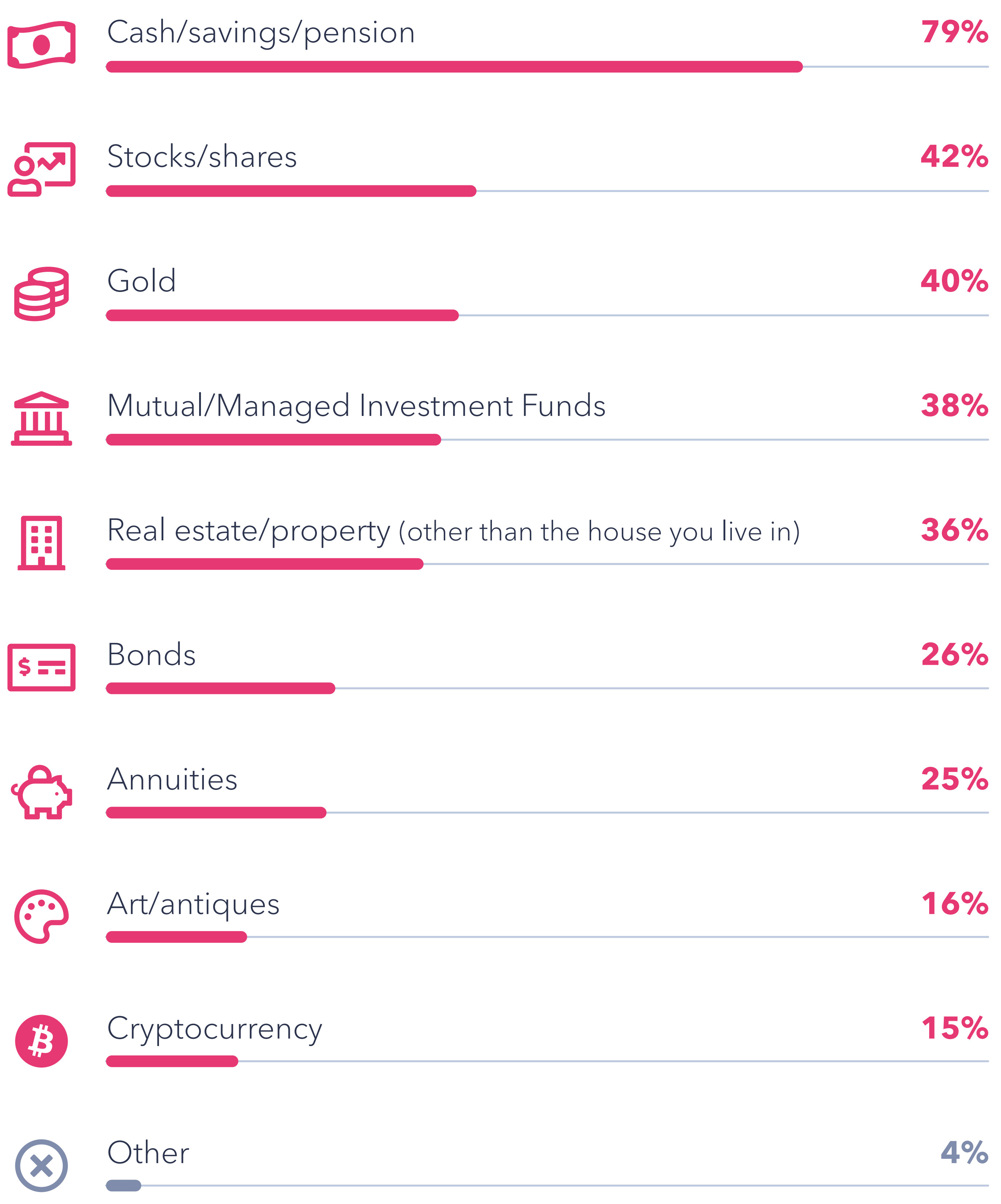
68% more likely to buy a product/service simply for the experience of being part of the community

68% more likely to say they are comfortable borrowing money

67% more likely to say they consider themselves to be much more affluent than the average

INVESTMENTS

% of busness leaders who have the following types of investments



Business leaders comprise 7% of the global online population, ranging from 3% in Europe to 9% in Asia Pacific. Although they do display a fairly broad array of demographic traits, they have a particularly high representation among highly educated 38-year-old males (61%). The large majority are married (80%) and with children (47%). The largest gender gap is in North America where under a quarter (23%) of business leaders are women, while the distribution in Latin America is more even (56% men vs. 44% women).

Business leaders by definition are **much more affluent than average** (they are 2.2x more likely to be in the top 25% income bracket). They belong not only to the top income earners, but also to the highest wealth-owners. **97% of them have some kind of savings or investments**, compared to 83% of the general internet population. They are also much more likely to own a property outright (85%) than with a mortgage (41%) and almost a third of them own two or more properties outright.

Questions: What kind of savings / investments do you have? // How many houses / properties do you own? **Source:** GlobalWebIndex Q2 2019 **Base:** 7,386 Business Leaders aged 25–64

Lifestyles

Business leaders are 81% more likely than the average consumer to fall into our cosmopolitan attitudinal segment (42% do). They like to be surrounded by different people, cultures, ideas and lifestyles (80% say this), regularly try new foods from other countries (71% say this) and would like to work and live abroad (61% say this).

Their cosmopolitan nature is clearly reflected in their travel habits, both personal vacations and professional travel. Although they're much more likely than average to embark on business trips, **personal vacations are still more common among this audience**. More than 9 in 10 go on domestic vacations regularly or semi-regularly compared to 86% who do so for business purposes. Regardless of the purpose of the travel though, **business leaders prefer staying in a hotel (90%)** than a rented accommodation (73%). This is a pattern across all major demographic breaks, but a preference toward hotels is most pronounced among older cohorts, with only 51% of 55-64-year-olds saying they typically stay in a rented accommodation compared to 85% who stay in a hotel.

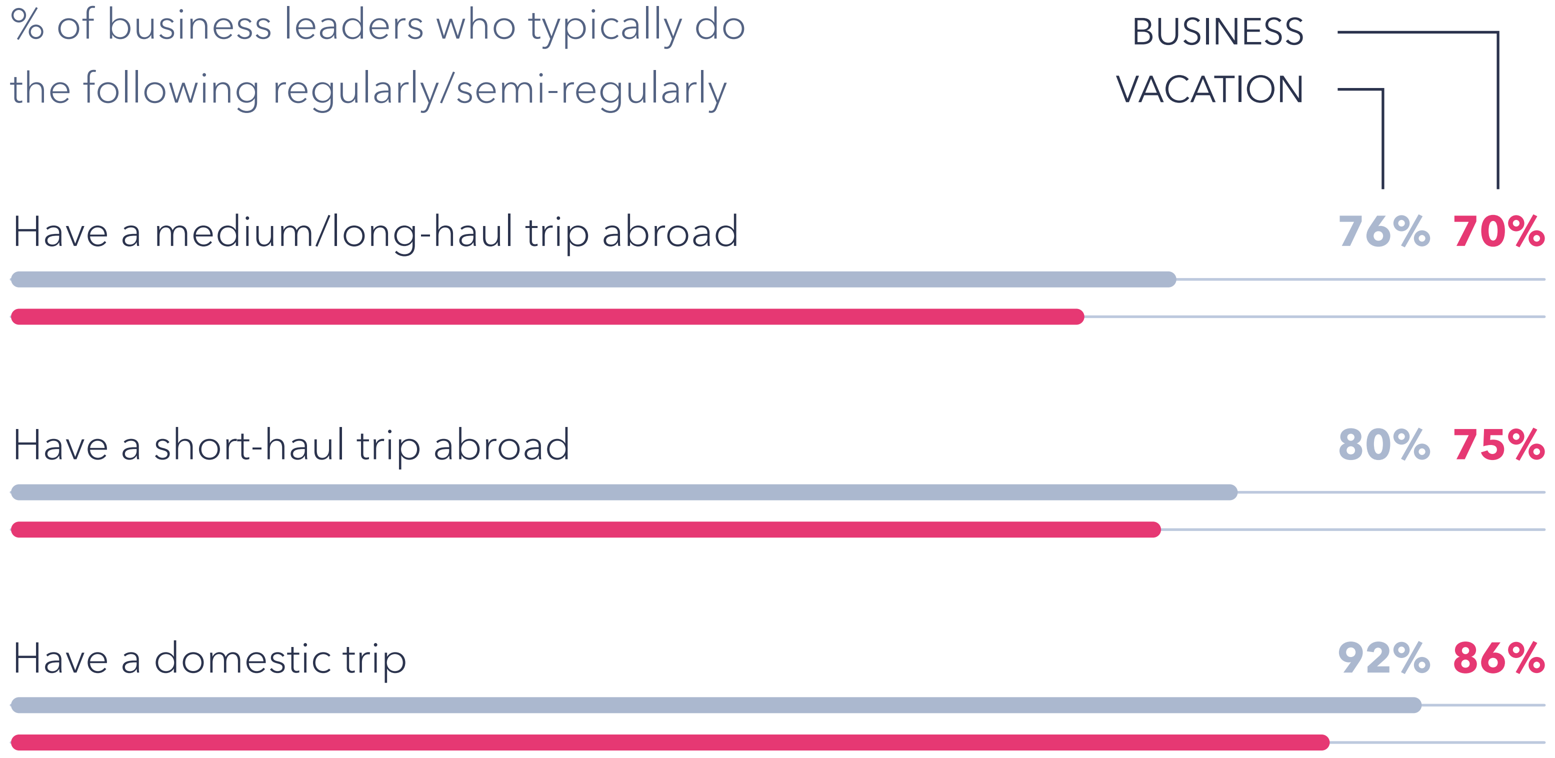
This is also a philanthropic audience; **42% of them donate to charity** regularly or semi-regularly and they're more than twice as likely to do so. **Charitable causes are at the core of their social media engagement too**, with this audience being 42% more likely than average to promote and support them on social (20% do so).

BUSINESS LEADERS AS COSMOPOLITANS

% of business leaders who agree with the following statements

TRAVEL BEHAVIORS

% of business leaders who typically do the following regularly/semi-regularly



Three-quarters of business leaders fly in business or first class regularly or semi-regularly

Questions: To what extent do you either agree or strongly agree with the statements below? // How often do you typically do the following? (Regularly/Semi-regularly) **Source:** GlobalWebIndex Q2 2019 **Base:** 7,386 Business Leaders aged 25–64

02

Business Leaders

Device Usage

Device Ownership

Despite excluding 16-24-year-olds and focusing on older and more experienced business leaders, this is still **an audience of early tech adopters**. They are 42% more likely than average to say that having the latest technological products is very important to them (73% say this). Even among the oldest demographic we track – 55-64s – it's 58% who claim this compared to 32% of all internet users at that age.

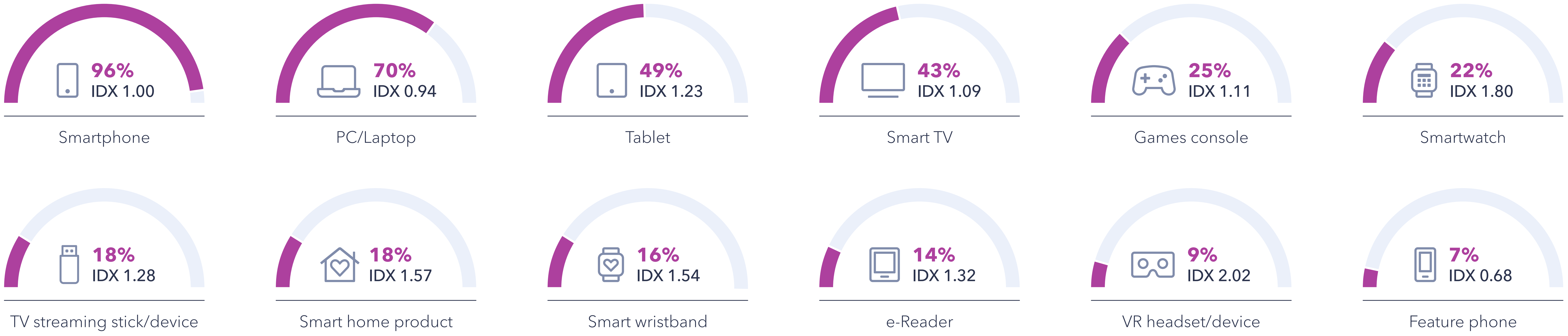
So, it doesn't come as a surprise that business leaders show above-average rates of owning smart devices like a smartwatch (Index 1.80), smart home product (Index 1.57), and smart wristbands (Index 1.54). What's more, their high levels of ownership for a number of devices shows how business leaders keep a broad device portfolio, having **an average of 3.9 devices**.

Business leaders are extremely reliant on technology and apps to stay connected and to organize their busy daily schedules. The vast majority (70%) would feel more insecure without their mobiles than their wallets and 74% say they're constantly connected online as the internet makes them feel closer to people (75% say this).

DEVICE OWNERSHIP

% of business leaders who own the following devices

Business leaders are early adopters of technology

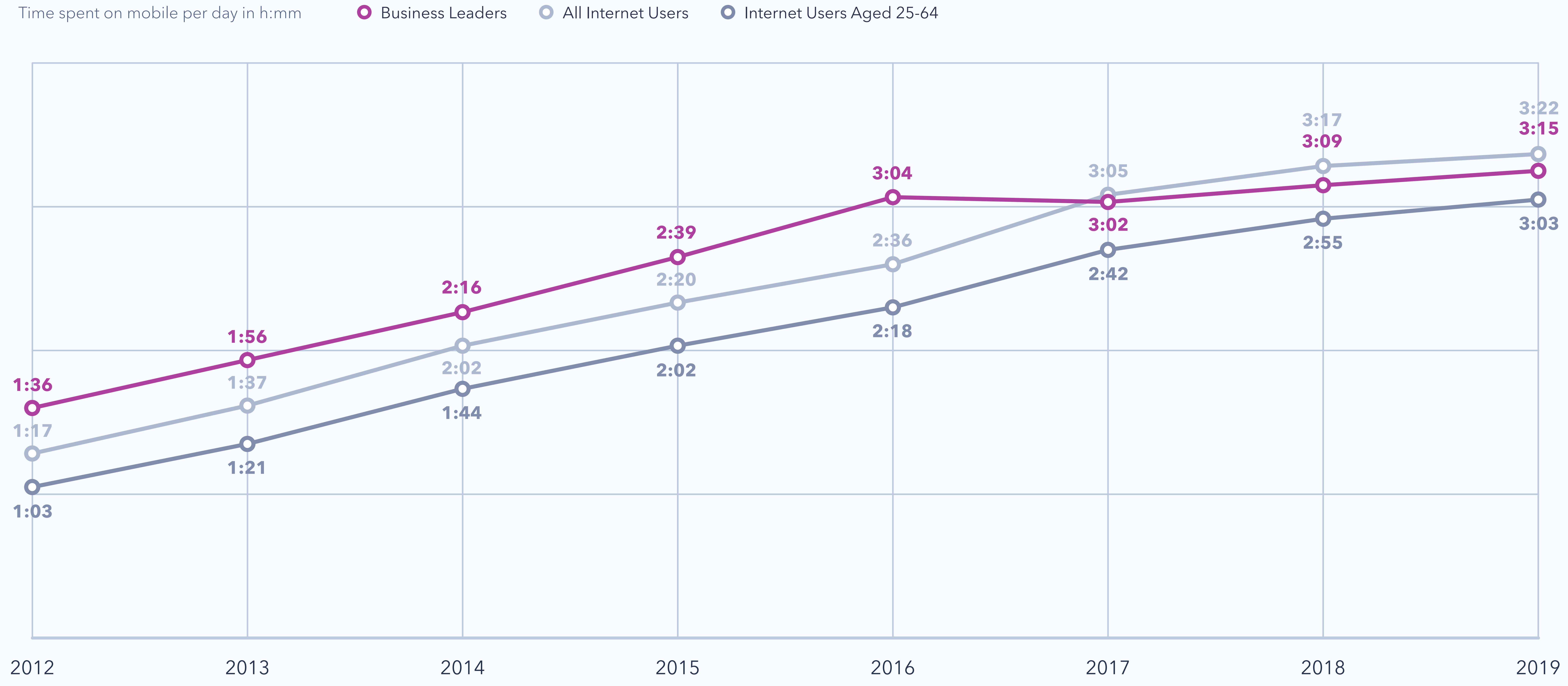


Question: Which of the following devices do you own? **Source:** GlobalWebIndex Q2 2019 **Base:** 7,386 Business Leaders aged 25–64

Mobile Usage Over Time

TIME SPENT ON MOBILE

Time spent on mobile per day in h:mm



Question: On an average day, how long do you spend online on a mobile/PC/laptop/tablet?
Source: GlobalWebIndex 2012–2019 (Averages of all waves between Q2 2012 and Q2 2019)
Base: 14,526 Business Leaders aged 25-64 (2019), 279,055 Internet Users aged 16-64 (2019) and 220,381 internet users aged 25-64 (2019)

Mobiles vs PCs

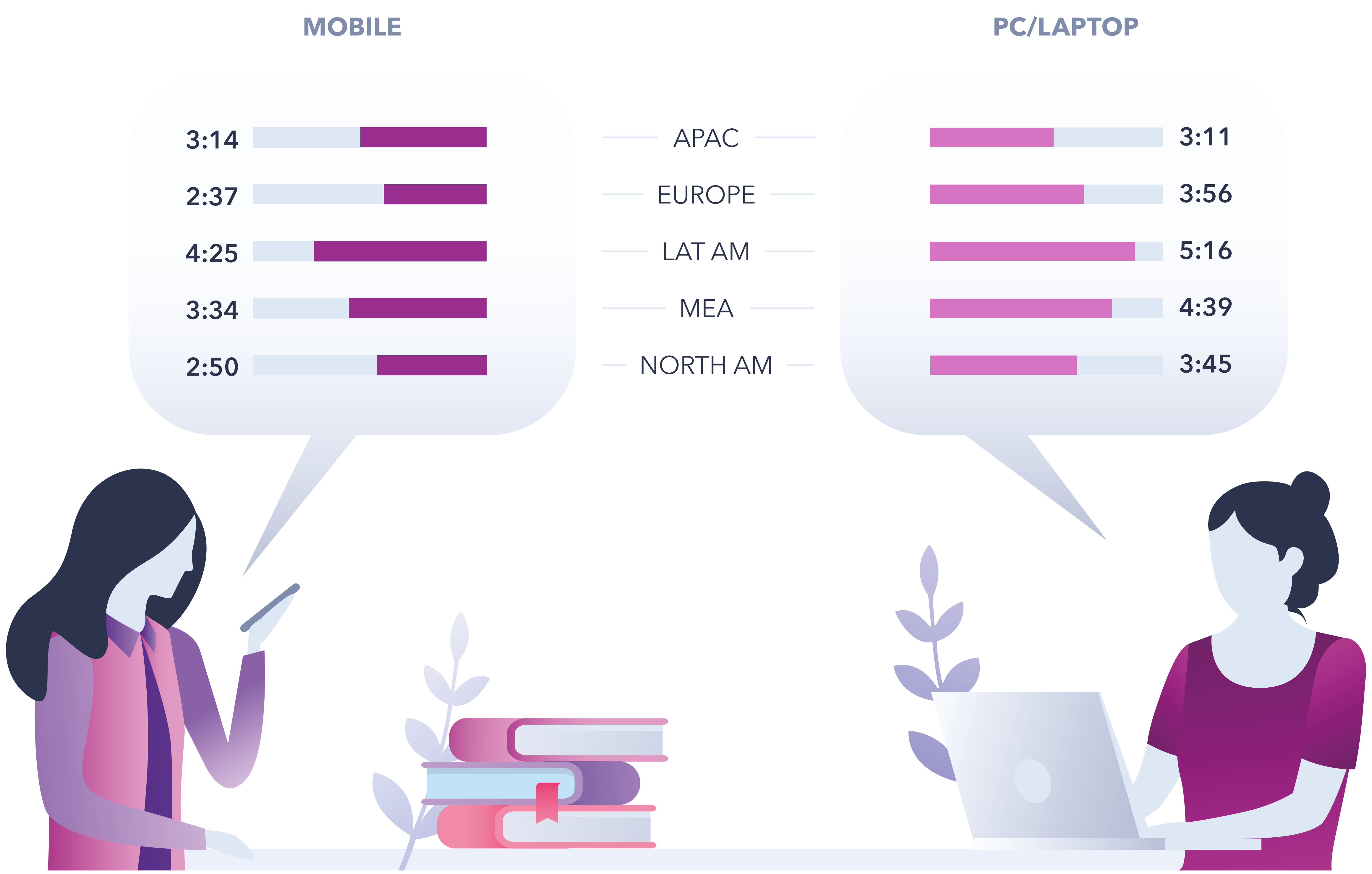
Business leaders, with their greater travel frequency, high income and time-compressed lifestyles, have been driving the technological shift from analog to digital and stationary to mobile tech since the 1950s. We can see from our data that **back in 2012 this audience was spending around 20 minutes longer online on their mobiles than the average internet user**. They led the charge on widespread mobile adoption. Since 2017 though, the rest of the online world rapidly caught up, which was largely driven by younger generations.

In 2019, business leaders spend slightly less (3h 15m) on their mobiles than the general online population (3h 22m). However, if we focus on internet users their age, i.e. 25-64s, **we see that business leaders are still ahead of their peers by around 12 minutes**. North America is the only region where in 2019 business leaders still spend more time online on their phones (2h 50m) than the average internet user (2h 29m). While in Europe, they've just reached parity at around 2h 37m.

Despite the widespread adoption of mobiles among this audience, **PCs and laptops are still central to their lives**. Globally, they spend an average of 13 minutes longer on the bigger screens every day, with **the biggest gap being in Europe where business leaders spend more than an hour longer on PCs**. Audiences are typically older here and have not seen the leap-frog pattern of technology adoption that led mobile and laptop devices to be embraced from the beginning. In Asia Pacific, on the other hand, mobile usage has surpassed PCs, though by a small margin.

MOBILES VS PCs (2019)

Time spent on PC/laptop/tablet per day in h:mm



Question: On an average day, how long do you spend online on a mobile/PC/laptop/tablet? **Source:** GlobalWebIndex 2019 (Averages of waves between Q1 2019 and Q2 2019) **Base:** 14,526 Business Leaders aged 25–64

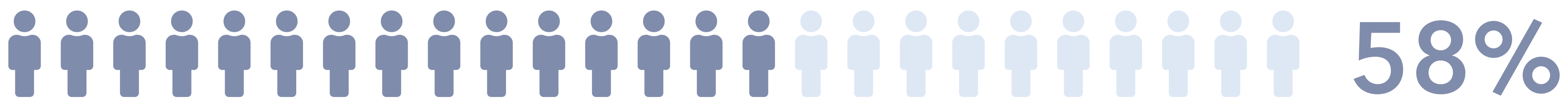
Mobile Purchase

MOBILE PURCHASE TIMEFRAME

% who plan to buy a new mobile phone or upgrade their existing phone in the next year

BUSINESS LEADERS

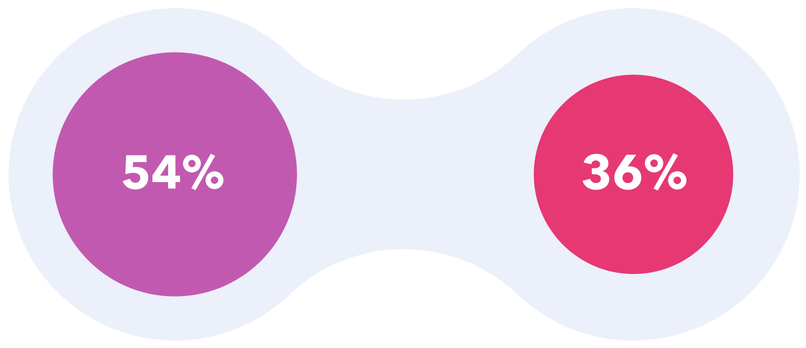
ALL INTERNET USERS



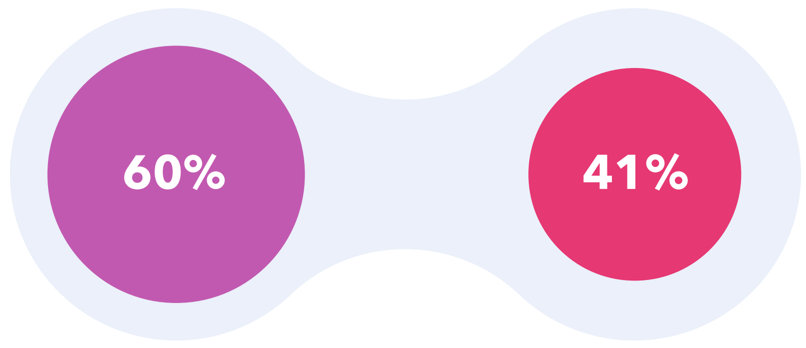
SAMSUNG VS IPHONE

% of business leaders outside China who currenty own/say the following would be their top choice when they next upgrade or buy a new mobile phone

Samsung iPhone



CURRENT OWNERSHIP



FUTURE CONSIDERATION

Consistent with their enthusiasm for the latest technological developments, **the mobile upgrade timeframe of business leaders is much shorter than that of the general population**. Three-quarters of them say they're planning to buy a new phone in the next year compared to under 60% of the broader online population. Outside China, Samsung is their top choice for a future upgrade (60%) by some distance from Apple (41%). This remains true across all regions, but **the demand for iPhone is largest in North America (50%), while Samsung is the most desired brand in the Middle East & Africa (69%)**.

Samsung is the leading mobile brand for both current ownership and future consideration

Questions: When do you plan to buy a new mobile phone or upgrade your existing phone? // Which of the following mobile brands do you currently own? // Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone? **Source:** GlobalWebIndex Q2 2019 **Base:** 5,612 Business Leaders outside China aged 25–64

Device Usage in the Workplace

The seniority of business leaders and their busy schedules are evident from the devices they use at work. The two most popular devices among this consumer segment – smartphones and laptops – can be easily used on the move. What's more, compared to the average knowledge worker*, **business leaders are much more likely to be provided with these devices by the company**, though 3 in 10 are still using their personal mobiles for work. Out of all devices listed in the chart, **business leaders are a lot more likely than the average knowledge worker to engage with tablets**. They are used by 4 in 10 in the workplace compared to only a quarter of all knowledge workers, but at the same time, companies don't seem to have a lot of demand for them (just 23% of business leaders' work tablets are provided by the company).

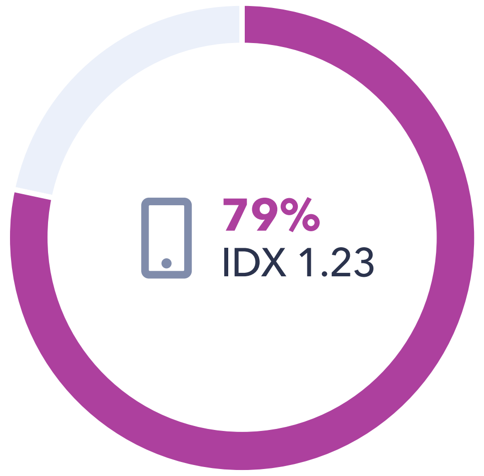
34% of business leaders believe their company is an innovator, i.e. using technology products or services before anyone else

* Indexes are against the average knowledge worker - anyone who holds an office position and/or works with data, analyzes information or thinks creatively in a typical work week.

DEVICE USAGE IN THE WORKPLACE*

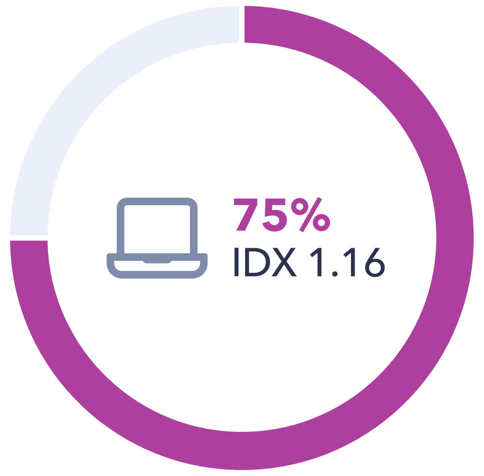
% of business leaders who use the following devices for work

Smartphone



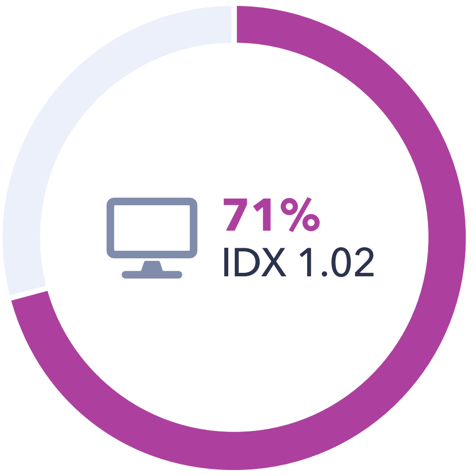
OWNED BY EMPLOYEE	30%
PROVIDED BY COMPANY	31%
BOTH	18%

Laptop/netbook



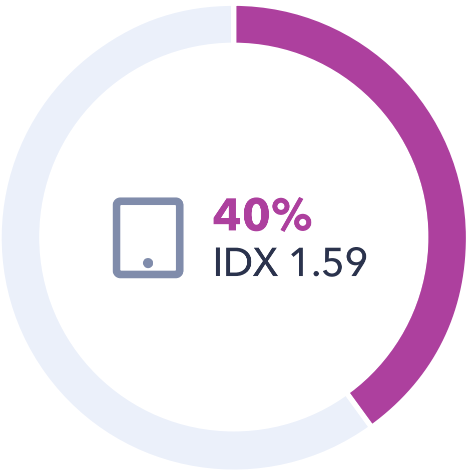
OWNED BY EMPLOYEE	10%
PROVIDED BY COMPANY	51%
BOTH	14%

Desktop PC



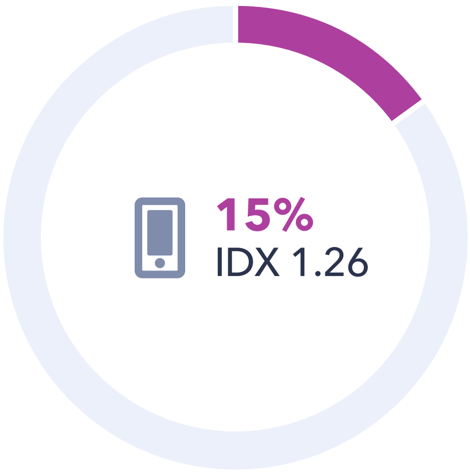
OWNED BY EMPLOYEE	8%
PROVIDED BY COMPANY	53%
BOTH	10%

Tablet



OWNED BY EMPLOYEE	9%
PROVIDED BY COMPANY	23%
BOTH	8%

Basic mobile phone



OWNED BY EMPLOYEE	5%
PROVIDED BY COMPANY	6%
BOTH	4%

Questions: Which devices do you use for work? // Are the devices that employees use provided by the company, or owned by the individual? **Source:** GlobalWebIndex Work 2019 **Base:** 1,977 Business Leaders aged 25–64

03

Business Leaders

Social Media Behaviors

Business Leaders on Social Media

AVG NUMBER OF SOCIAL MEDIA ACCOUNTS

8.4	11.5
ALL INTERNET USERS	BUSINESS LEADERS

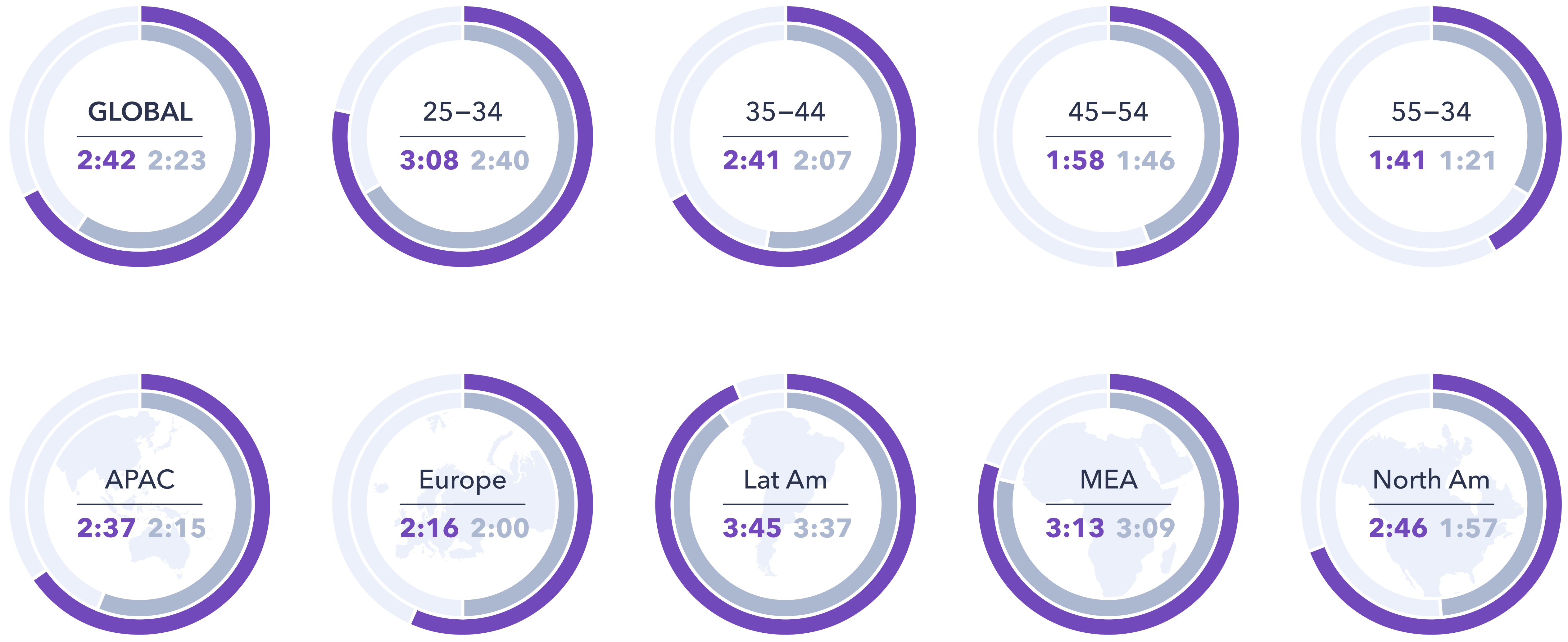
Time-poor or not, business leaders still manage to make time for social media, for both personal and professional reasons. **They average 2 hours and 42 minutes per day on social networks** in Q2 2019, which is around 20 minutes longer than all internet users. With accounts across multiple platforms, this time is spread out. This is an audience of multi-networkers; they have around 11.5 accounts (3.1 more than the global average), so they're quite an easy consumer segment to find online.

However, depending on their age and region, business leaders devote different amounts of time networking on social media. Consistent with the global picture, the younger they are, the more time they spend on social media, with 25-34-year-olds averaging 3h 8m, around 48 minutes longer than the average internet user that age. Those in North America stand out the most from the rest of the online population here when it comes to time spent on social media. Business leaders devote almost 50 minutes longer on social media than the average in the region, which is 45% of their total online time.

TIME SPENT ON SOCIAL MEDIA

Time spent on social media per day in h:mm

● Business leaders ● All internet users



Social media accounts for 45% of business leaders' daily online time in North America

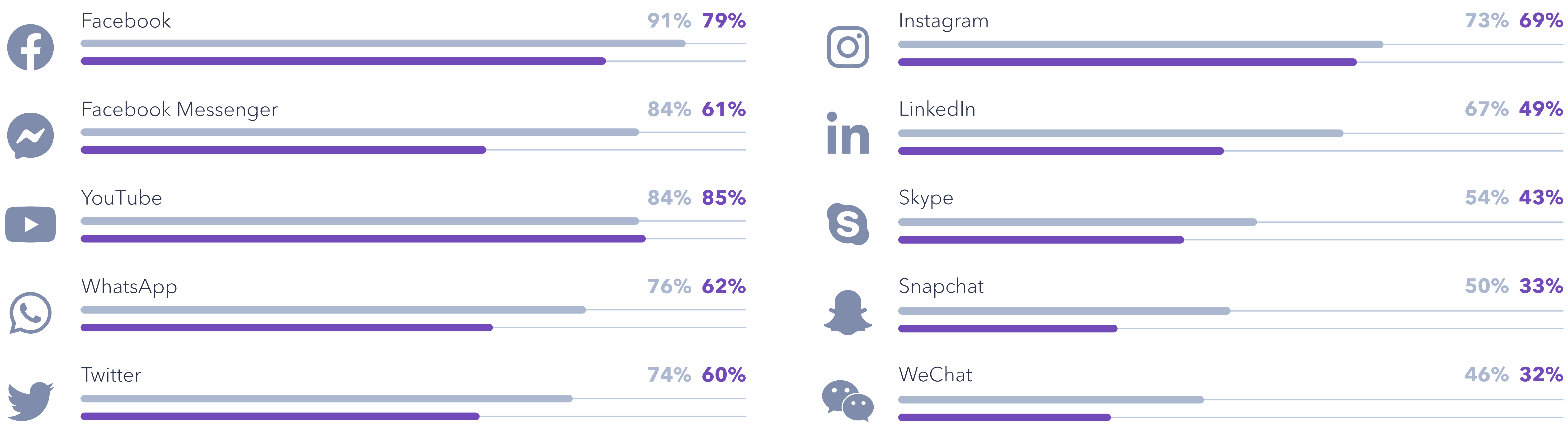
Questions: On which of the following services do you have an account? // On an average day, how long do you spend on social media? **Source:** GlobalWebIndex Q2 2019 **Base:** 7,386 Business Leaders aged 25–64

Business Leaders on Social Media

TOP 10 SOCIAL NETWORKS

% of busness leaders outside China who have accounts/have visited the following social networks in the past month

Members Visitors/users



Looking at specific platforms outside China, **the vast majority of business leaders have accounts with Facebook (91%)**, but not all of those use it on a monthly basis (79% do). The opposite is true for YouTube; it is the only platform that has a slightly higher visitation (85%) than membership rate (84%), giving the platform the biggest overall reach (most likely because usage of YouTube doesn't require a sign-up). In fact, **3 in 10 of business leaders on YouTube have watched a video or ad made by a brand in the past month**.

Business leaders outside China are also **45% and 27% more likely than average to use LinkedIn and Twitter**, respectively. This is reflected in some of the main reasons why they're on social media in the first place. Over a third of them say they're using social networks to stay-up-to-date with news and current events and more than 3 in 10 do so to network for work. Business leaders are also much more likely to follow journalists (Index 1.60) and entrepreneurs (1.33) on these platforms.

Questions: On which of the following services do you have an account? // 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 2019 **Base:** 5,612 Business Leaders outside China aged 25–64

Social Media in the Workplace

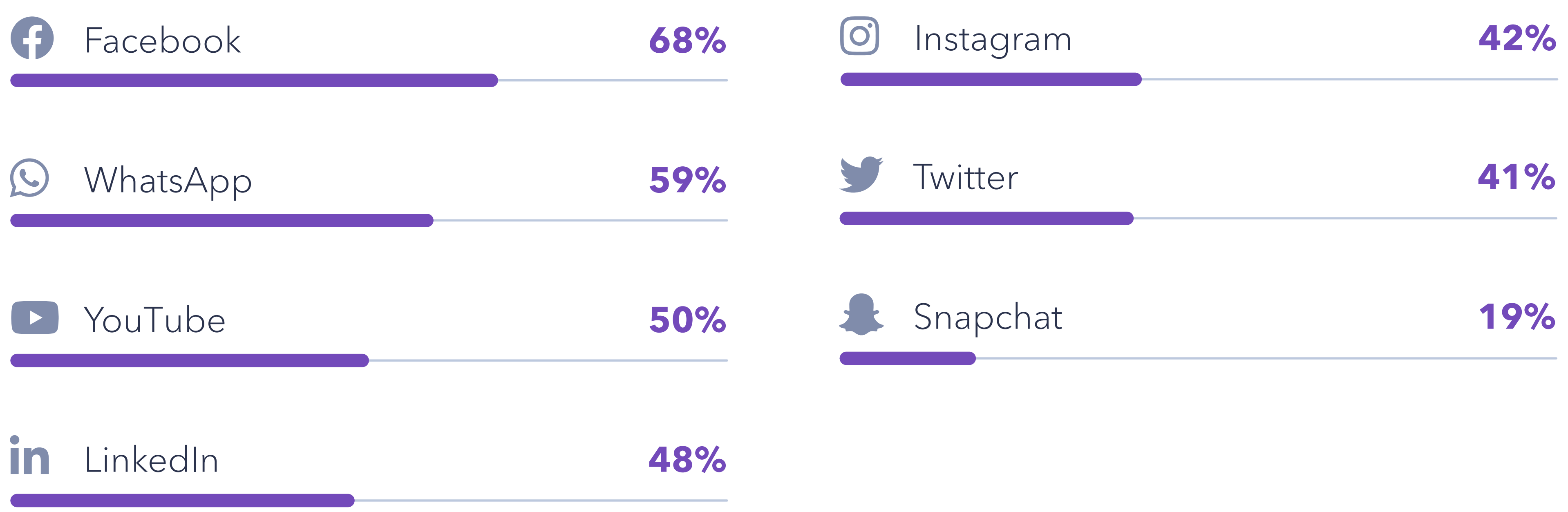
Facebook is business leaders' most popular platform in the workplace; almost **7 in 10 say their company has an account** and it's the most commonly used platform as well. Facebook is primarily used for sharing general updates (35%) and communicating directly with customers (35%), according to this audience.

Although YouTube is vastly used in business leaders' personal lives, the platform's popularity somewhat fades at work and it's largely replaced by WhatsApp. **Six in 10 of this audience say their company has signed up for WhatsApp** and, as a messaging service, it's primarily used for direct communication with customers (33%).

As we saw earlier, in their personal lives, business leaders tend to use social media to follow up with the news, for work or to look for entertainment. Social media plays a different role in the workplace according to this audience though. **Behaviors like sharing updates and actively keeping in touch with customers are more common than other more passive activities like reading industry news or following other companies.** Almost 4 in 10 business leaders on Facebook have read a news story in the past month, compared to only 28% who say Facebook is used for keeping up with industry news at work.

TOP SOCIAL NETWORKS IN THE WORKPLACE

% of business leaders who say their company has work-related accounts on the following social media platforms



TOP 3 REASONS FOR USING SOCIAL MEDIA IN THE WORKPLACE

% of business leaders who say their team/company uses each of these services for the following reasons

- **35%** Share general updates
- **35%** Communicate with customers
- **34%** Share marketing messages

- **33%** Communicate with customers
- **29%** Share general updates
- **28%** Share marketing messages

- **23%** Share general updates
- **22%** Share marketing messages
- **21%** Read industry news

- **23%** Communicate with customers
- **23%** Share marketing messages
- **22%** Share general updates

- **19%** Communicate with customers
- **19%** Share marketing messages
- **18%** Share general updates

Questions: Why does your team / company use each of these services? // Does your team / company have work-related accounts on any of the following social media platforms? **Source:** GlobalWebIndex Work 2019 **Base:** 1,977 Business Leaders aged 25–64

04

Business Leaders

Purchase Journey in the Workplace

B2B Brand Discovery

As the main decision-makers in a company, it's crucial for brands to understand business leaders' purchase journeys.

In line with the global picture, **search engines remain the most popular brand discovery channel, used by 47% of business leaders**. Other more traditional sources like contact from brand representatives and recommendations follow suit, but these vary by region. **Search engines are not that influential in North America.** Recommendations from colleagues (39%) and direct contact from representatives (39%) carry the same weight as search engines here.

Sources like emails, brochures and ads in traditional media lag behind for brand discovery. There's little to be gained from expecting business leaders to click through ads and mass mailings, unless they can bring them into channels they're more likely to trust.

The ways this audience finds out about brands also varies by age and differences reflect their media habits more broadly. Depending on their age, business leaders discover brands from sources they're more likely to spend time on. Those aged 35-44 spend around 40 minutes longer a day reading print and online press than 55-64-year-olds. As a result, they're **72% more likely than the average full-time worker to find out about brands via news articles**. Similarly, those aged 25-34 spend the most time on social media (3h 08m on average) and they're **75% more likely to discover brands via brand posts on these platforms**.

B2B BRAND DISCOVERY CHANNELS

% of business leaders who find out about new brands when purchasing items for their business or department via...

TOP OVER-INDEX BY AGE*

25–34	IDX 1.75	Brand pages or posts on social media
35–44	IDX 1.72	News/opinion articles in trade magazines or websites
45–54	IDX 1.44	News/opinion articles in trade magazines or websites
55–64	IDX 1.56	Direct contact from brand representatives

*Indexes are against the average full-time worker

Question: When purchasing items for your business or department, how do you typically find out about new brands? **Source:** GlobalWebIndex Q2 2019 **Base:** 7,386 Business Leaders aged 25–64

B2B Product Research

When they've discovered a brand, business leaders are more likely to turn to traditional sources for information. More than half of this audience say that **recommendations from industry analysts (53%) and user reviews (53%) are the most influential** when they're researching new products for business purposes. **B2B brands therefore need to ensure that they have experts on board and products are marketed by trusted voices in the industry.** Customer satisfaction and a positive reputation is extremely important for companies that want to target this decision-making audience. With 87% of business leaders saying that it's important to be well-informed about things, this is clearly a group that exhausts all research channels before completing a purchase.

TOP 5 MOST INFLUENTIAL RESEARCH CHANNELS*

% of business leaders who say the following are very influential when they are researching or considering a new product/service for their company

Recommendations from industry analysts	53%
User reviews	53%
Recommendations from colleagues/friends/contacts	50%
Conferences/trade shows/events	49%
Provider/supplier websites	48%

7 in 10 business leaders say that they like to seek an expert opinion before buying products (Index 1.20)

TOP 3 BY AGE

25–34	
58%	User reviews
56%	Recommendations from industry analysts
53%	Search engine results

45–54	
46%	Recommendations from industry analysts
43%	Provider/supplier calls, demos or trials
43%	Recommendations from colleagues/friends/contacts

35–44	
54%	Recommendations from industry analysts
53%	Conferences/trade shows/events
53%	User reviews

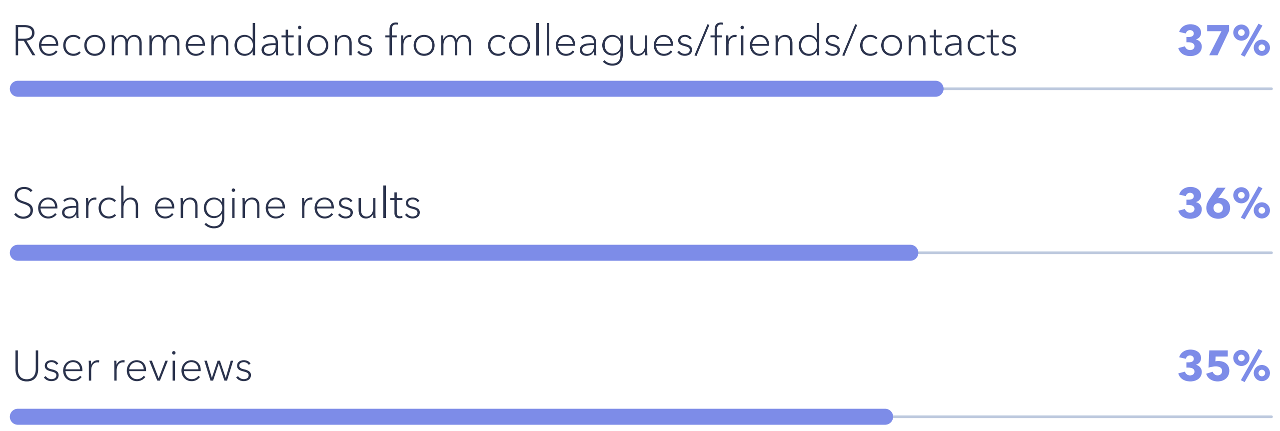
55–64	
39%	Recommendations from colleagues/friends/contacts
37%	Recommendations from industry analysts
33%	Provider/supplier calls, demos or trials

*This question is asked to Decision-Makers only

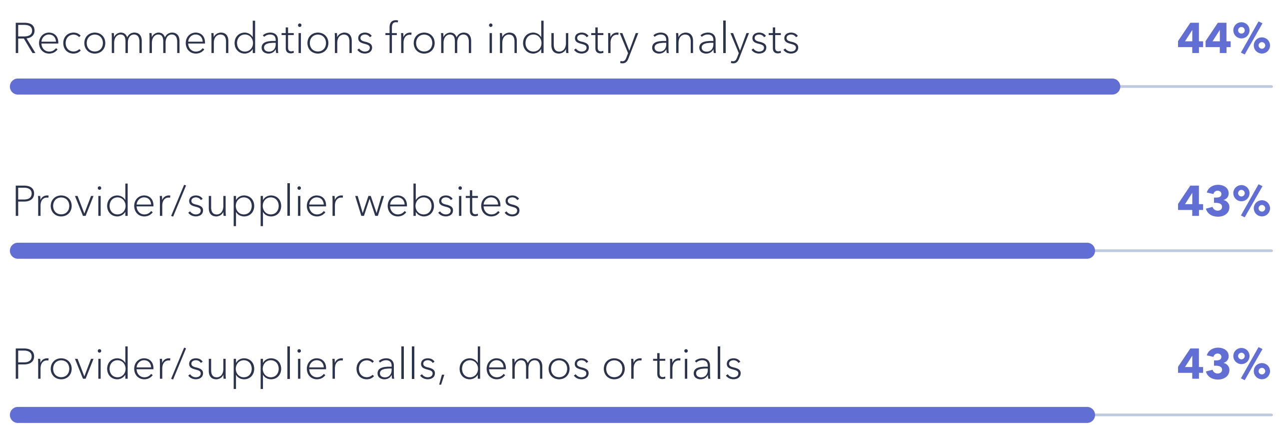
Question: When you are researching or considering a new product/service for your company, how influential are the following information sources? **Source:** GlobalWebIndex Work 2019 **Base:** 1,977 Business Leaders aged 25–64

Types of B2B Product Research

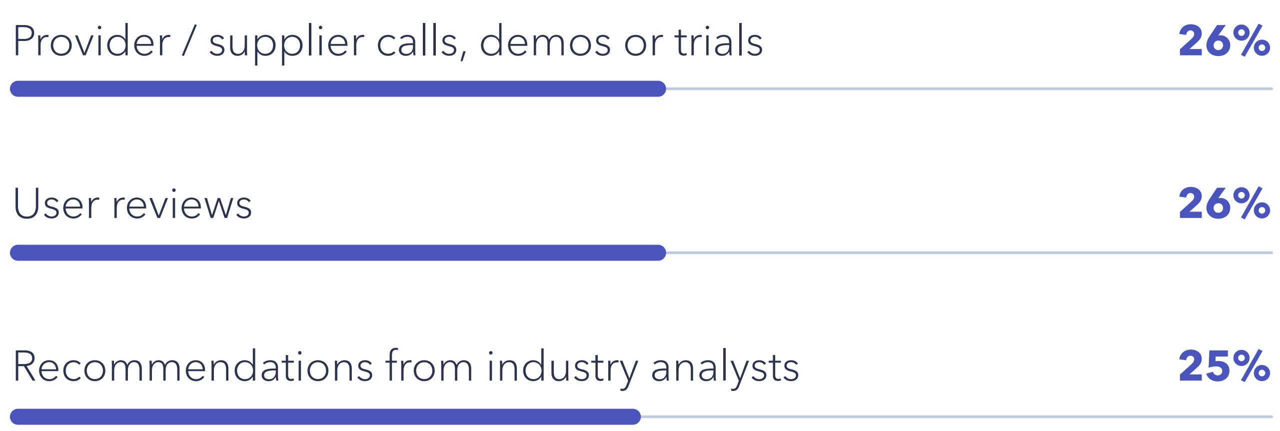
GENERAL INFORMATION*
% of business leaders who say they use the following for general information



PRICE COMPARISON*
% of business leaders who say they use the following to compare prices and features



PURCHASE DECISION*
% of business leaders who say they use the following to decide which products to buy



Importantly, the channels business leaders use for research are targeted carefully depending on what they want to know about the product. Peer recommendations work best for general information, but they are not as influential when it comes to price comparison or making the final decision to buy the product. **Research around purchase decisions is mostly done via supplier calls, demos or trials, meaning that business leaders want to ensure the product they're about to purchase would be the best-suited one before they commit to it.** In fact, when it comes to cloud storage services like Google Drive, a third of business leaders say they've used a trial version before moving to paid, compared to 26% who haven't.

Similar to brand discovery and general research, **online sources like video sites and social media come after more established and personal methods when business leaders are looking to compare prices**. Recommendations from industry analysts is the most likely source this audience would go to for information on prices (44%), while social networks remain behind at 34%.

*This question is asked to Decision-Makers who said that these research channels are quite or very influential when they are researching or considering a new product/service for their company.

Question: You said these sources were influential. What do you typically use them for? **Source:** GlobalWebIndex Work 2019 **Base:** 1,977 business leaders aged 25-64

The Role of Social Media

Facebook is the go-to platform for those 42% that do consider social media as a very influential source of research. This is consistent across all age groups and it's especially pronounced among 25-34-year-olds, 68% of whom use the platform. YouTube is a close second, with 3 in 10 business leaders watching videos or ads made by a brand on the platform each month.

In terms of the content they're using to inform their purchase decision, this group is most likely looking at posts by companies (48% say so) and by current users of the product (47%). Essentially, they're searching for user reviews on social media, which once again reiterates that **business leaders' B2B research habits are largely formed around objective and trusted opinions**.

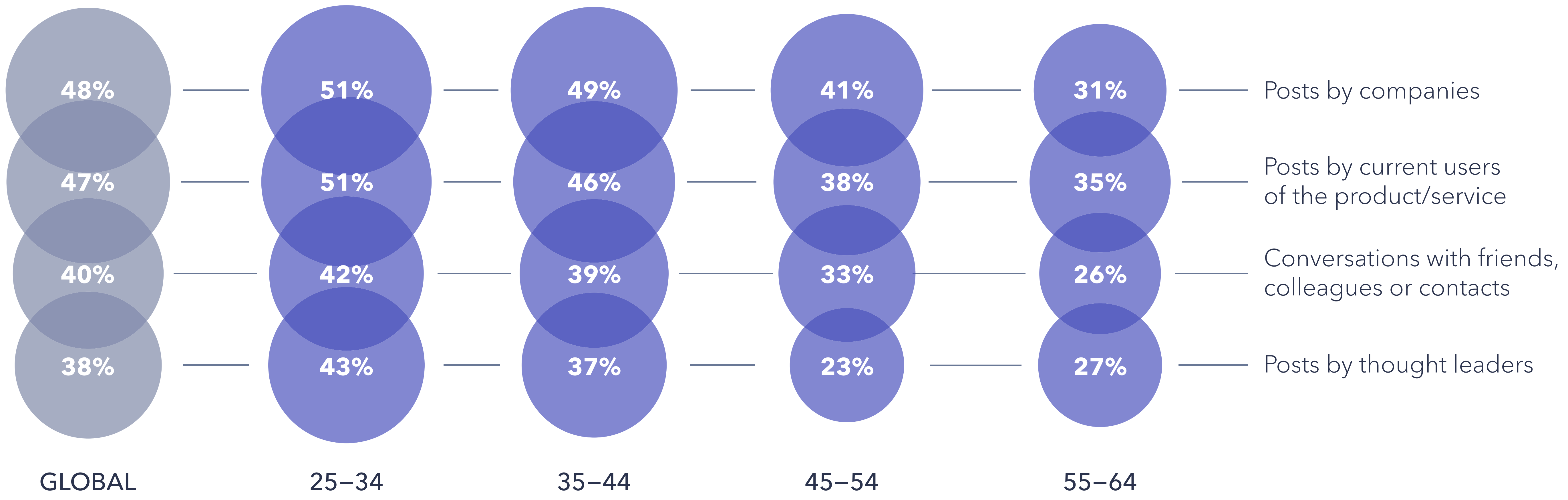
42% of business leaders say social media is a very influential source of B2B research, jumping to 50% among 25-34s

TOP 5 SOCIAL NETWORKS USED FOR RESEARCH*

% of business leaders who use the following social mdia sites to research/consider new products/services

CONTENT USED FOR RESEARCH*

% of business leaders who say they find the following most useful when using social media to research products or services



*This question is asked to Decision-Makers who said that social media is quite or very Influential when they are researching or considering a new product/service for their company.

Questions: Which social media sites do you use to research / consider new products / services? // When using social media to research products or services, which of the following do you find useful? **Source:** GlobalWebIndex Work 2019 **Base:** 1,977 Business Leaders aged 25–64

Purchase Influencers in the Workplace

When it comes to buying new technology or software products, **ease of use is by far the most important purchase influencer for business leaders (66% say so)**. It overrides budget-related features like the product being able to reduce costs (59%) or the actual price of the product (60%), and by some distance. This varies strongly by age though.

Despite generally being down the list of influencers, cost reduction is in fact the feature that would most entice older business leaders to purchase the product. **Seven in ten 55-64s say that reducing costs would be very important if they were to purchase a new tech solution for their company.** On the other end of the spectrum, those aged 25-44 place the most value on how easy the product would be to use and the value that it will bring to the team. The importance of security cannot be overstated either, especially for attracting 45-54-year-olds, who are most likely to purchase the product if they're sure that the data is protected and encrypted.

When compared to the average knowledge worker, **business leaders care mostly about the extent to which the solution provides scalability (65% more likely to say so) and enables them to work remotely (63% more likely to say so)**. In simpler terms, they would ideally want to ensure that the software is adaptable to the changing needs or demands of internal and external stakeholders. This is crucial given that the most important reason why a business leader would consider buying a product in the first place is to improve the efficiency and processes in the company (40% say so).

4 in 10 business leaders would consider buying a new product or service to improve efficiency or processes in the company

TOP 10 PURCHASE INFLUENCERS*

% of business leaders who say the following would be very important if they were to purchase a new technology/software product or service for their company

Ease of use	66%
Security (e. g. that data is protected and encrypted)	65%
Value	65%
Improving productivity/efficiency	64%
Technical support being available	63%
Ease of installation/implementation	61%
Price	60%
Integration with products/services already being used	60%
Reducing costs	59%
Reputation of the provider	58%

TOP 3 BY AGE

25–34	
64%	Ease of use
62%	Value
62%	Technical support being available
35–44	
68%	Ease of use
68%	Security
67%	Improving productivity/efficiency
45–54	
75%	Security
74%	Improving productivity/efficiency
73%	Value
55–64	
70%	Reducing costs
69%	Security
69%	Improving productivity/efficiency

*This question is asked to Tech Decision-Makers only.

Question: If you were to purchase a new technology/software product or service for your company, how important would the following things be? **Source:** GlobalWebIndex Work 2019 **Base:** 1,977 Business Leaders aged 25–64

Notes on Methodology

This report draws figures from both GlobalWebIndex's Core online research among internet users aged 16-64 and GlobalWebIndex's Work online research among knowledge workers 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 575,000 internet users aged 16-64 and 17,000 knowledge workers aged 16-64 across 10 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a 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.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from **GlobalWebIndex's Q2 2019** wave of research across 45 countries, with a global sample of 139,658 respondents and **Work 2019** research across 10 countries, with a sample of 17,000 respondents.

CORE RESEARCH

Argentina	89	1,565
Australia	186	4,056
Austria	39	1,291
Belgium	21	1,282
Brazil	86	2,355
Canada	95	2,301
China	1,774	15,215
Colombia	55	1,330
Denmark	15	1,257
Egypt	29	1,788
France	181	5,152
Germany	153	5,176
Ghana	0	847
Hong Kong	124	1,813
India	983	7,594
Indonesia	98	1,855
Ireland	18	1,269
Italy	123	5,363
Japan	45	1,877
Kenya	0	958
Malaysia	72	1,533
Mexico	173	2,619
Morocco	0	947
Netherlands	21	1,311
New Zealand	32	1,298
Nigeria	0	958
Philippines	27	1,627
Poland	46	1,875
Portugal	25	1,288
Romania	17	1,309
Russia	63	2,273
Saudi Arabia	34	1,537
Singapore	190	2,714
South Africa	48	1,548
South Korea	27	1,278
Spain	120	5,114
Sweden	24	1,314
Switzerland	34	1,291
Taiwan	54	1,783
Thailand	28	1,570
Turkey	60	1,536
UAE	129	1,804
UK	512	10,146
U.S.A.	1,484	25,037
Vietnam	52	1,604

WORK RESEARCH

Australia	89	1,250
Brazil	176	1,000
France	162	1,250
Germany	133	1,250
India	460	2,000
Japan	71	1,000
Singapore	103	1,000
Spain	117	1,250
UK	293	3,000
USA	373	4,000

- Business leaders
- All internet users

Notes on Methodology

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 2019. 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.

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**.

INTERNET PENETRATION RATES

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data.

Argentina	78%
Australia	88%
Austria	88%
Belgium	89%
Brazil	71%
Canada	94%
China	59%
Colombia	66%
Denmark	97%
Egypt	54%
France	85%
Germany	88%
Ghana	48%
Hong Kong	91%
India	42%
Indonesia	39%
Ireland	87%
Italy	62%
Japan	92%
Kenya	43%
Malaysia	83%
Mexico	69%
Morocco	69%
Netherlands	93%
New Zealand	93%
Nigeria	36%
Philippines	64%
Poland	79%
Portugal	78%
Romania	72%
Russia	80%
Saudi Arabia	83%
Singapore	85%
South Africa	62%
South Korea	95%
Spain	87%
Sweden	96%
Switzerland	96%
Taiwan	83%
Thailand	58%
Turkey	71%
UAE	95%
UK	96%
U.S.A.	80%
Vietnam	55%

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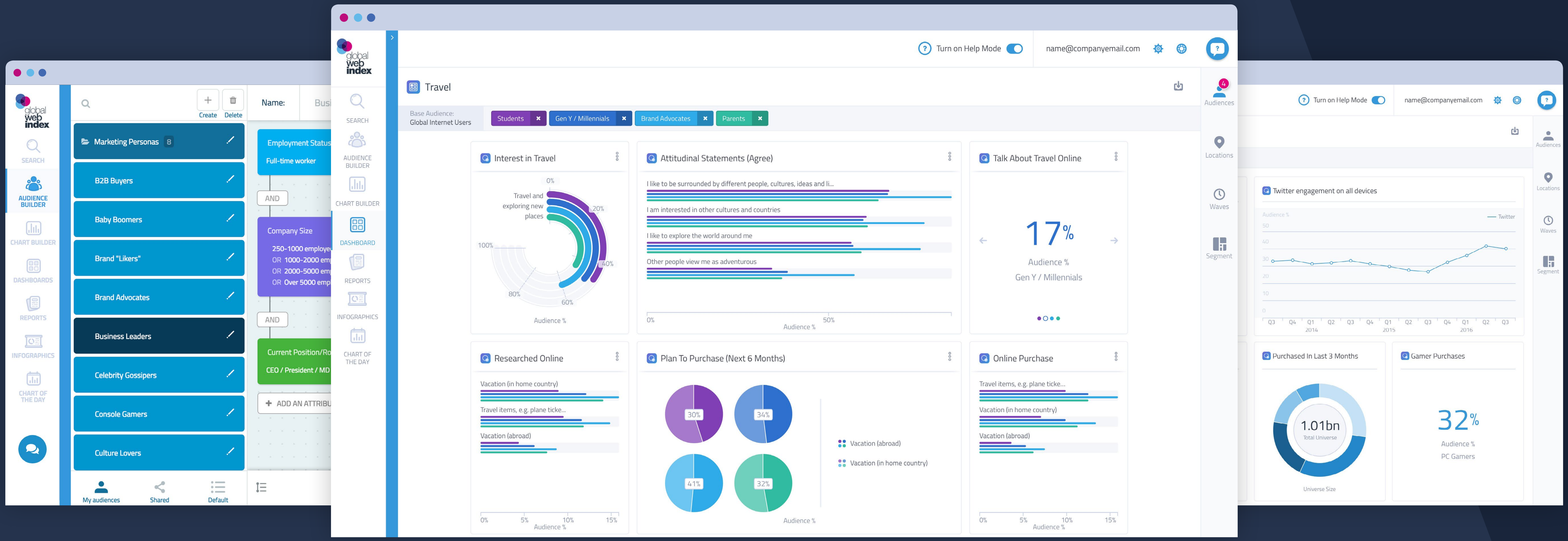

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