



Commerce

GlobalWebIndex's flagship report
on the latest trends in commerce

FLAGSHIP REPORT 2020

globalwebindex.com



What's inside?

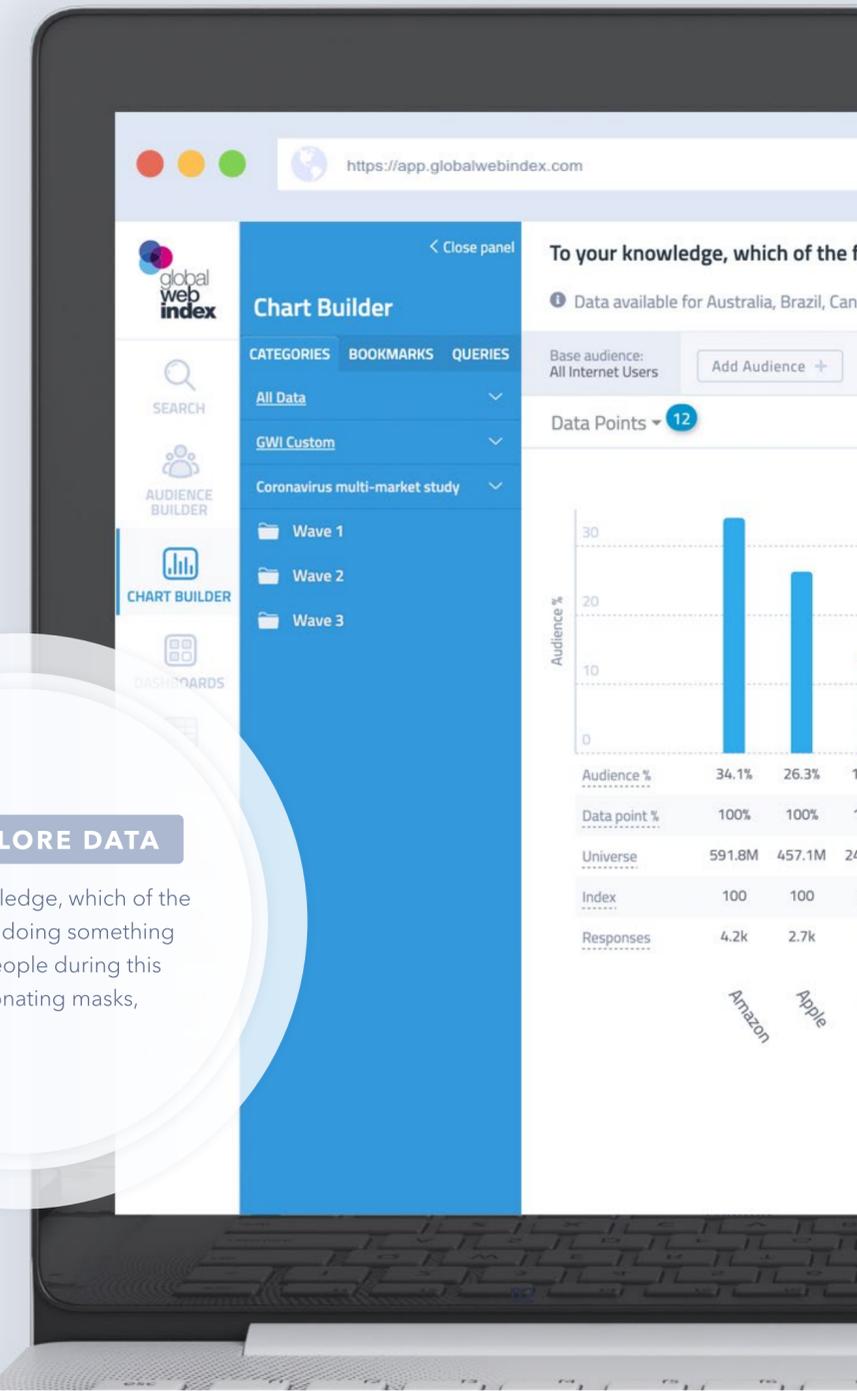
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RECREATE CHARTS FOR YOURSELF

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time and among custom audiences. You can find the corresponding question to each chart in the right hand column, starting from left to right. Any charts which do not contain a hyperlink are from a GWI custom study. Custom study data is not available to explore on our Platform.

EXPLORE DATA

To your knowledge, which of the following are doing something to support people during this crisis (e. g. donating masks, money, etc)?



Introduction

GlobalWebIndex's Commerce flagship report provides the most important insights in the world of commerce, from how economic confidence and spending habits are changing, to the latest figures for consumers' digital preferences in ecommerce.

This report focuses on:

- ✔ **A new spending mindset** - how has COVID-19 affected economic confidence and consumer spending?
- ✔ **Digital goods and subscriptions** - how have changing media habits brought about by the pandemic affected digital commerce?
- ✔ **A turning point for commerce** - is new demand for ecommerce here to stay?
- ✔ **The purchase journey** - are these changing media habits affecting how consumers discover and research brands online?
- ✔ **The ecommerce landscape** - what devices and platforms are consumers using to shop online?

Methodology

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle-East and Africa, and the Asia-Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

When reading this report, please note that we use a mixture of global data from our ongoing quarterly research, as well as data from our five waves of custom COVID-19 research across up to 20 countries affected by the pandemic; a custom recontact study from August 2020, conducted in the U.S. and UK only; as well as insights drawn from our new GWI USA dataset which surveys internet users aged 16+.

INDEXES

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 global average. 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.

Key insights

01

Economic confidence saw a massive drop in Q2 2020.

This is a sentiment felt most strongly in Europe, however, concern in other markets fluctuates – just 7% of internet users in China expect their economy to get worse in the next 6 months; yet Chinese consumers are currently some of the most prudent in their spending habits.

02

COVID-19 has had a global impact on commerce but its outcomes are highly diverse on a market-by-market basis.

Every country had a different experience and this is reflected in their spending patterns; in the West, home and garden purchases ticked upward while purchases of experiential and travel services fell globally.

03

The acceleration of online purchases will continue to surpass pre-pandemic levels, and is largely driven by existing online shoppers.

While *nearly* half of all internet users plan to shop online more frequently after the pandemic is over, increased purchases are mainly down to existing online shoppers expanding the list of items they buy online, rather than new shoppers flooding into the market.

04

Outside of China, online grocery shopping is the vertical that's seen the most explosive growth.

The greatest increase in demand is seen in the U.S./Canada and major ecommerce platforms, notably Amazon, are looking to secure their cut of this demand. In the U.S./UK grocery subscriptions are *slightly* more popular than music streaming services.

05

There's clear demand for contactless payments as consumers increasingly look for safer ways to pay.

Contactless payments have been accelerated by the pandemic. Their appeal is cross-demographic, but some of the strongest growth is from older consumers in Western countries; markets where growth has traditionally been hard-won.

06

Global lockdowns encouraged people to expand their media consumption. It's boomers specifically who have obtained new preferences for the long term.

While people engaged with a number of new media types at the start of lockdown, these have trended downward since March. The only significant increases are for watching streaming services and using social media. Baby boomers have noticeably expanded their media consumption behaviors, opening up new ways for brands to engage with them in the online purchase journey.

01

Commerce

A new spending mindset

Tanking economic confidence

In Q4 2019, 19% of internet users expected the economy in their country to get worse in the next 6 months; by Q2 2020 this figure stood at 36% but it's a sentiment that's felt differently around the world.

While consumers often feel detached from their own economies, those expecting their personal finances to get worse has doubled in the same time frame (from 10% to 20%). And this is affecting how they're spending.

By mid August 2020, nearly 10 million employees have been **placed on furlough** in the UK and while the data in the U.S. is more difficult to analyze, it's estimated that 1 in 5 workers there are **collecting** unemployment benefits.

As a result, consumers in these countries are adopting practices to save - **3 in 10 have switched to buying a product from a different brand because they offer lower prices**. While others are reevaluating their demands of ecommerce. **Among consumers who say that next-day delivery would increase their likelihood of buying a product, during COVID-19 30% say they've allowed for longer delivery time if it saves them money.**

7 in 10 internet users in Europe expect the economy in their country to get worse in the next 6 months

Brands must be aware that markets around the world are feeling the financial implications of the pandemic to different extents. In many cases they can no longer rely on brand loyalty - financial incentives will likely be needed for many months, if not years to come.

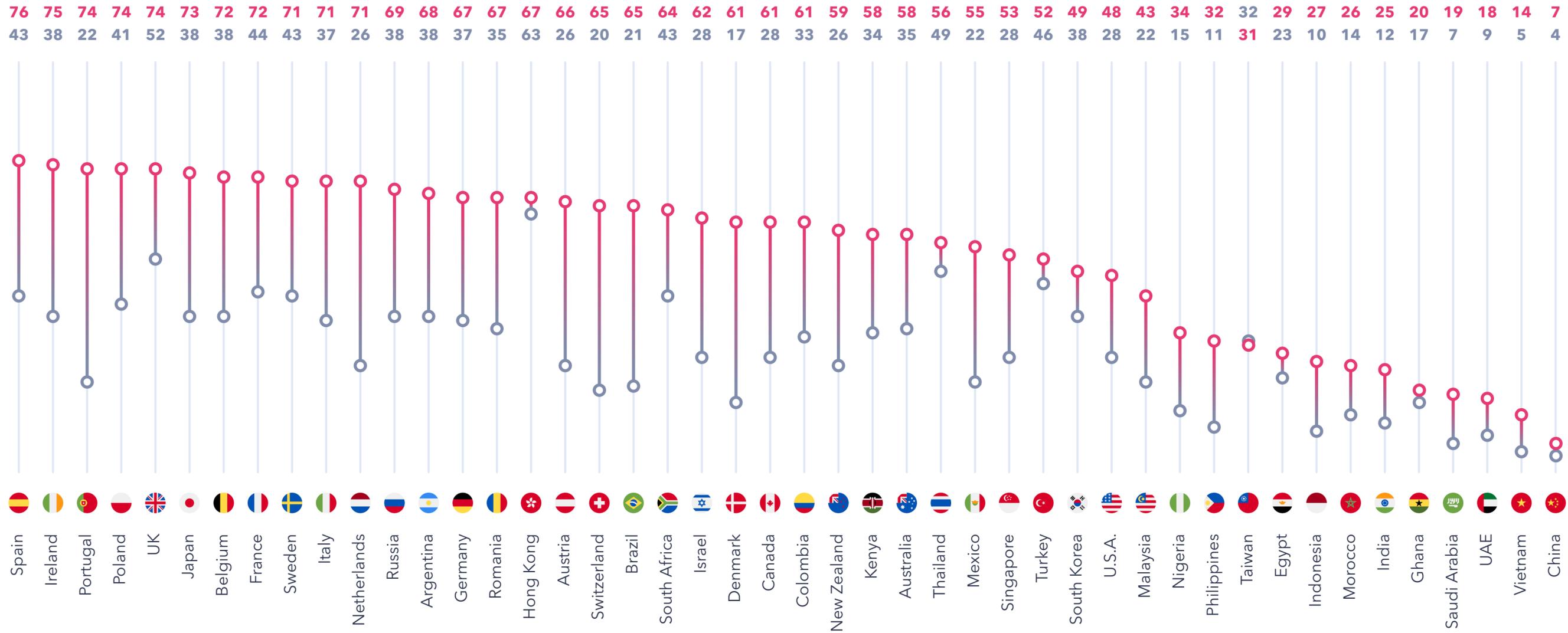
This financial conservatism has resulted in the adoption of numerous money saving services including online auctions, online marketplaces, voucher apps, buy-now-pay-later schemes, and **price comparison websites - the latter of which 1 in 4 internet users in the U.S./UK have used in the last four months**. Retailers should look to work alongside these providers if they want to see out this storm.



Tanking economic confidence

ECONOMIC CONFIDENCE FALLS ACROSS THE GLOBE | % of internet users who think the economy in their country will **get worse** in the next 6 months

○ Q4 2019 ○ Q2 2020



[EXPLORE DATA](#)

Question: In the next 6 months, how do you think the following will change?
Source: GlobalWebIndex Q4 2019 & Q2 2020
Base: 173,859 (Q4 2019) & 179,219 (Q2 2020) internet users aged 16-64

COVID-19: Purchase delays

The effect of COVID-19 on global commerce has been unprecedented. While practically every industry has been affected by reduced consumer demand, it's **the tourism sector that's taken the biggest hit. In mid-March, 41% of consumers across 13 countries surveyed said they delayed purchasing a vacation, but by May this had risen to 53%.** A similar story is seen with flights - 26% had originally delayed purchasing these, rising to 33% in May.

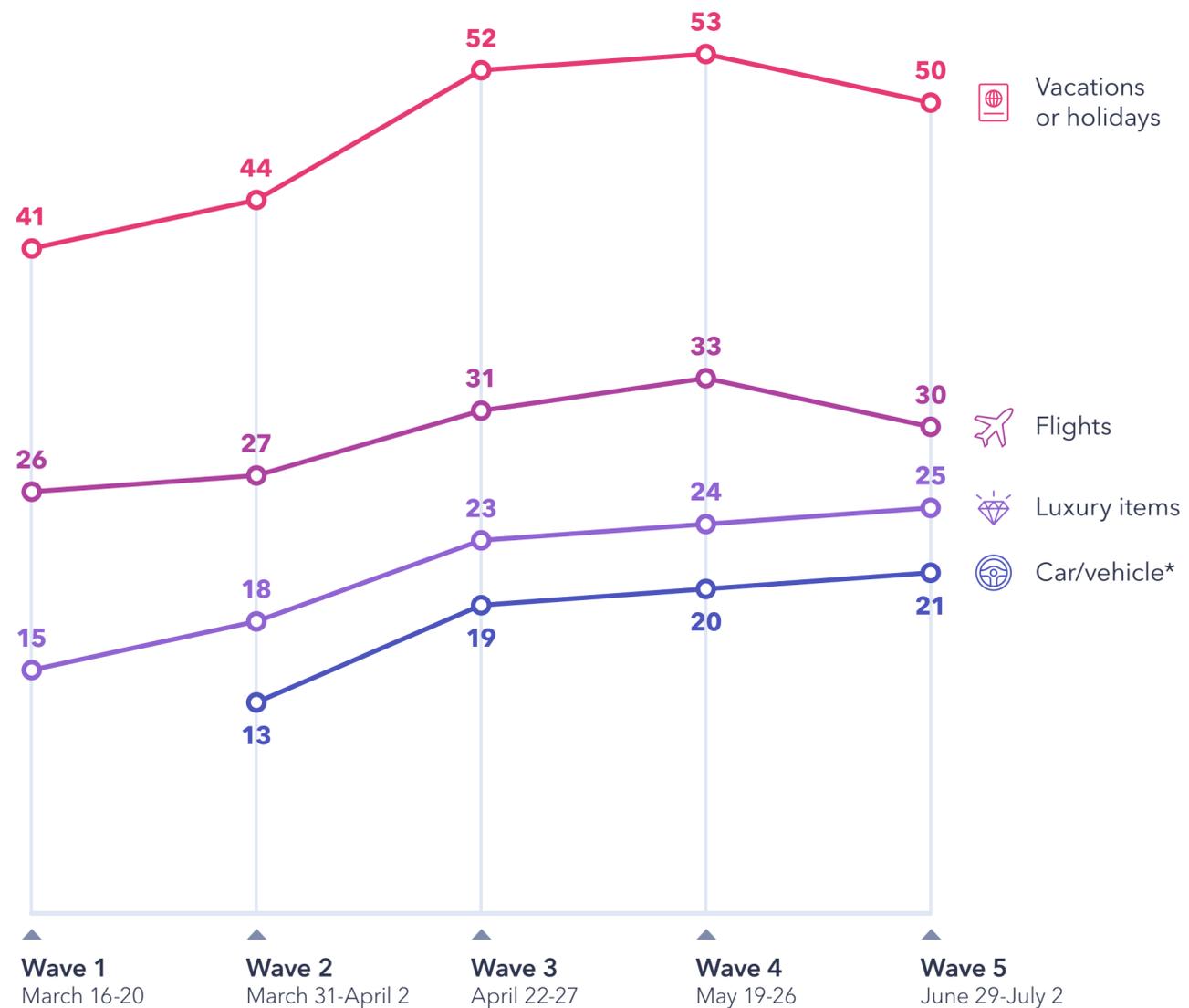
That said, **things seemingly improved in July, with less consumers reporting they've delayed purchasing flights (30%) or vacations (50%).** So while a significant portion of consumer demand for vacations has been suppressed by official restrictions, public desires for a summer holiday have - for the most part - outweighed the safety concerns associated with international travel. Among all countries surveyed in our July COVID-19 research, **22% said their priority purchase right now is a vacation, reaching a high of 33% in Singapore and 31% in the UK.**

Delays to more expensive purchases, such as luxury items or cars, continued to tick upward even as we headed into July. Ultimately, after months in lockdown, consumers are yearning for a vacation. Bigger, riskier purchases, for now at least, can wait.

In July, 21% of internet users across 13 countries said that when it comes to large purchases that they've delayed, they don't expect to buy them until the outbreak is over in their country. That said, this figure has fallen slightly from around 25%, which has been the consistent figure since March. So while some purchases might still be a while off, the fact that this is starting to drop is another hopeful sign for brands.

THE TRAVEL COMEBACK?

% of internet users in 13 countries who have delayed purchasing the following as a result of COVID-19



*this datapoint was added during the 2nd wave of COVID-19 research

[EXPLORE DATA](#)

Question: Have you delayed purchasing any of the following, as a result of the coronavirus/COVID-19 outbreak?
Source: GlobalWebIndex Custom Research, March-July 2020
Base: 12,845 (March 16-20), 12,246 (March 31-April 2), 12,426 (April 22-April 27), 12,578 (May 19-May 26), 12,170 (June 29-July 2) internet users aged 16-64 in 13 countries

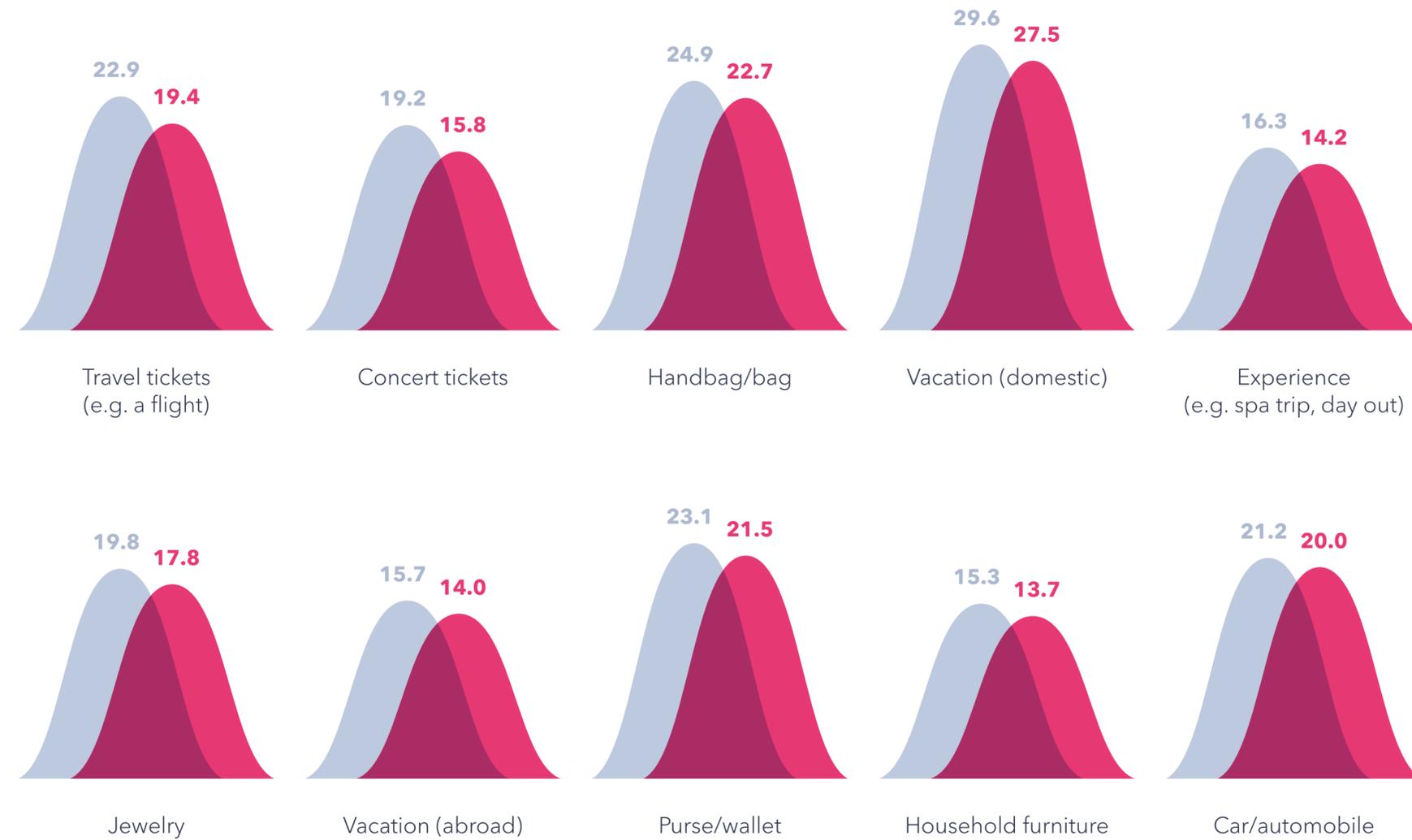


Lockdown spending patterns

MAJOR PURCHASES: THE TOP 10 FALLERS

% of global internet users who say they've purchased the following products in the last 3-6 months (sorted by biggest decrease)

● Q1 2020 ● Q2 2020



[EXPLORE DATA](#)

Question: Which of these products have you or your household purchased in the last 3-6 months?

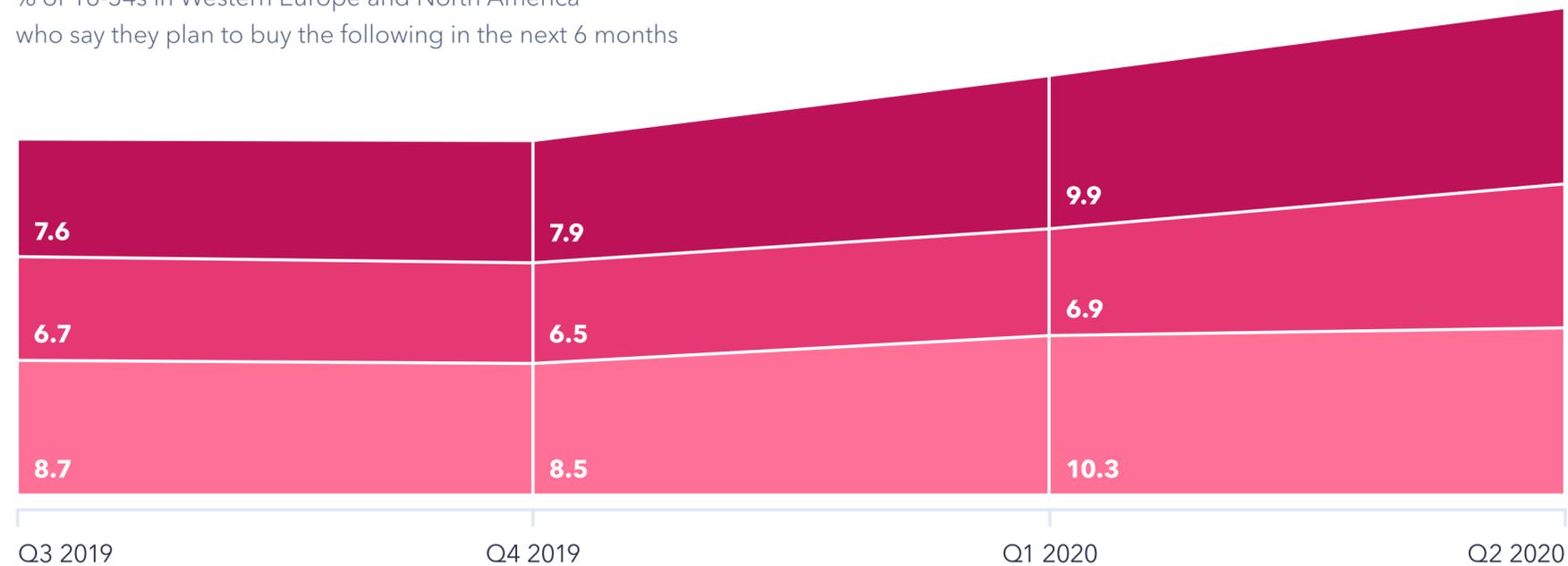
Source: GlobalWebIndex Q1-Q2 2020

Base: 143,232 (Q1 2020) & 125,195 (Q2 2020) internet users aged 16-64

Lockdown spending patterns

YOUNGER GROUPS IN THE WEST ARE SPLURGING IN THE HOME

% of 16-34s in Western Europe and North America who say they plan to buy the following in the next 6 months



 **11.4**
Sofa

 **9.3**
Home exercise equipment

 **10.8**
Garden furniture

2020 saw most of the world enter lockdown for a prolonged period of time. However, this doesn't mean that we see a uniform picture in changing consumer behaviors.

Every country had a different experience. The length of lockdown varied around the world, as did the number of cases; differing climates affected how we spent our time at home; and economic and technological advancements saw financial implications and home working opportunities fluctuate on a country-by-country basis.

Our research across 46 countries is consistent and harmonized meaning we can compare consumer behaviors between countries in a like-for-like manner.

North America and Western Europe are typically service economies - meaning there's a higher proportion of white-collar job sectors compared to more manufacturing-based economies in fast growth countries. As a result, a larger proportion of people were able to work remotely. **It's here that we see small but unmistakable indications of consumers shifting their spend toward in-house or home improvement purchases, especially among younger people.**

These countries are in the temperate zone of the Northern hemisphere, as lockdown progressed from spring into summer, purchases of garden furniture and home exercise equipment also ticked upward.

So while globally it was **the most expensive and the most experiential products that saw the biggest fall in demand in Q2 2020**, brands must be aware that global trends are by no means the complete story. Consumers around the world had varied experiences and this was reflected in their spending behaviors.

 [EXPLORE DATA](#)

Question: Which of these items are you/your household thinking about purchasing in the next 3-6 months?

Source: GlobalWebIndex Q3 2019-Q2 2020

Base: 72,035 internet users aged 16-34 in Western Europe & North America (Countries include: Austria, Belgium, France, Germany, Ireland, Netherlands, Switzerland, UK, Canada, U.S.A.)

02

Commerce

A turning point for commerce

COVID-19: Embracing the online

COVID-19 hasn't just impacted consumer spending, it's also affected how they purchase too.

With non-essential retailers in many countries forced to close their shops and consumers becoming more safety-conscious, the move to ecommerce - which has been gaining momentum for years - shifted into a whole new gear. **In late April, across 15 countries* surveyed, 43% of consumers said they planned to shop online more frequently once the pandemic was over - by July this had risen to 49%.**

The shift to online spending is in-turn accelerating omni-channel shopping expectations. For instance, in our late-April research 22% said they'll continue to buy more things online for in-store collection, and 27% said they'll do more research online before making in-store purchases.

While ecommerce around the globe has been accelerated by the pandemic, those in **APAC, South Africa, and Latin America were - on balance - more inclined to say they'll shop online more frequently after the outbreak.** Whereas, Europe and North America fall slightly behind. For instance, just 28% of consumers in France say they will, compared to the global average of 49% and a high of 59% in India.

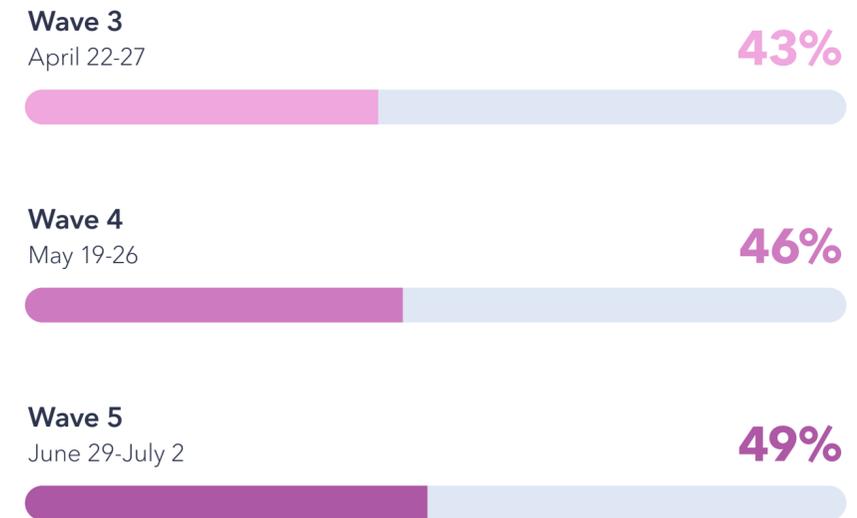
The important thing to understand when looking at increased demands from ecommerce is whether or not it's the result of existing users doubling down on their engagement, or new users shopping online for the first time.

52% of high-income earners plan to shop online more frequently after the pandemic is over, compared to 44% of lower earners

Among those who said they didn't shop online pre-lockdown, 31% said they were doing this during lockdown and planned to continue doing so afterwards. In reality, the majority of internet users were shopping online before the outbreak. So when we add these new users to the existing online shopper base before the pandemic, the growth isn't as substantial as many might assume. This method indicates that the increase in the total online shopper base so far due to lockdown stands at just 6%. Ultimately, it's clear that COVID-19 has propelled demand for online shopping from predominantly existing users.

PLANS TO SHOP ONLINE MORE POST COVID-19 CONTINUE TO GROW

% of internet users in 15 countries who say they plan to shop online more frequently once the outbreak is over



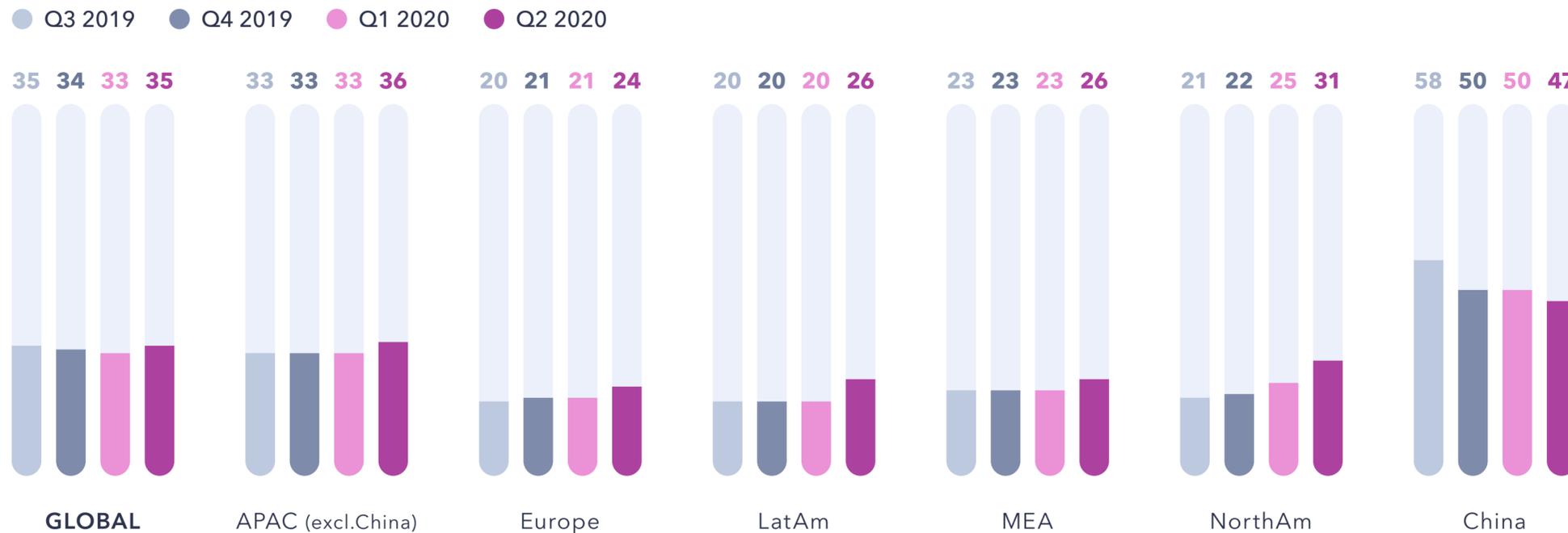
[EXPLORE DATA](#)

Question: After the outbreak is over, do you think you'll do any of the following? (Shop online more frequently)
Source: GlobalWebIndex Custom Research, April-July 2020
Base: 13,979 (April 22-27), 14,204 (May 19-26), & 13,717 (June 29-July 2) internet users aged 16-64 in 15 countries

*Australia, Brazil, China, France, Germany, India, Italy, Japan, New Zealand, Philippines, Singapore, South Africa, Spain, UK and U.S.A.

Which industries are best-set for ecommerce post-COVID?

ONLINE GROCERY PURCHASES AROUND THE WORLD | % of internet users who have purchased groceries online in the last month



Consumers have looked to purchase a wider variety of products online through forced circumstances, and our data shows which categories have seen the greatest increases in online demand. Again this varies by region.

Between Q3 2019 and Q2 2020, the percentage of internet users who have purchased grocery items in Europe has steadily increased from 20% to 24%; a

small, but statistically significant increase. In North America this is even greater, growing from 21% to 31%. There's also been considerable growth in APAC (excl. China), MEA, and LatAm. However, in China this has steadily decreased.

In our COVID-19 April research we found that among UK internet users who said they plan to shop online more after the pandemic, half

said they're now more likely to order groceries online for home delivery - in China, just 38% agreed.

While online grocery shopping may be most developed in China, it's becoming increasingly less popular. Whereas, in much of the world, COVID-19 continues to accelerate this trend.



Trends in online grocery shopping can offer valuable insights into future changes in broader ecommerce behaviors. Because it's a high-frequency category, an increase in online grocery shopping can result in higher levels of familiarity and confidence in online shopping overall, and help to keep online options top-of-mind

Simon Kemp, CEO & Founder of Kepios

And these regional differences don't stop there. **In the U.S., Canada, and Europe we've also seen above-average increases in online purchases of electronics, household items, and personal care products.** It's in these industries specifically where digital commerce behaviors have developed in leaps and bounds in recent months.

EXPLORE DATA

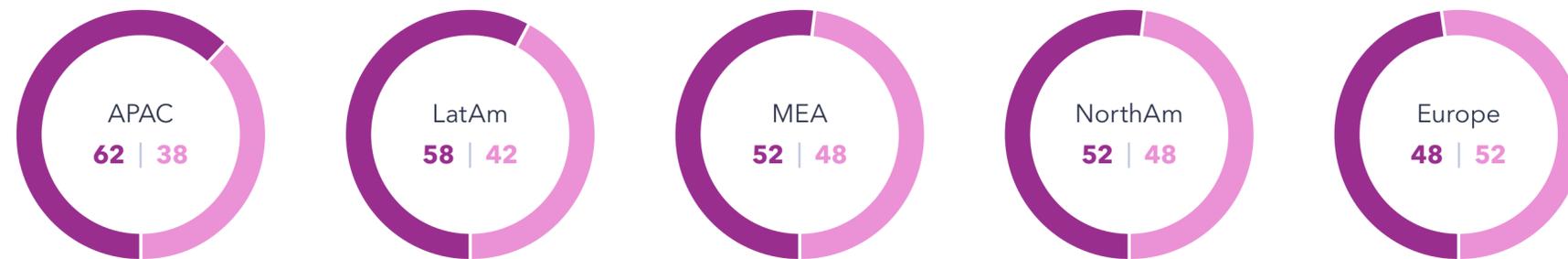
Question: In the last month, which of these have you or your household purchased?
Source: GlobalWebIndex Q3 2019-Q2 2020
Base: 530,747 internet users aged 16-64

The changing in-store experience

ONLINE SHOPPING TAKES THE LEAD ACROSS MOST REGIONS - EUROPE IS THE EXCEPTION

% of internet users in each region who prefer to do the following

● Shop online ● Shop in-store



Globally, **58% of consumers say they'd rather shop online, compared to 42% who would rather shop in-store.** The only region which is more in favor of in-store shopping is Europe, but it's marginal at 52%. Age also plays an important role here. **At 55%, baby boomers are the only generation to prefer to shop in-store.** Whereas 59% and 61% of Gen Z and millennials, respectively, would prefer to shop online.

While online shopping is preferred by many, this doesn't mean that physical retail is obsolete. Like online retail, physical retail needs to evolve with the times too.

Hygiene factors are absolutely paramount and are the new "must haves", with convenience also being key. **In the U.S./UK, 44% of internet users say that effective safety measures would make them more likely to buy a product in store, while a third want quicker ways to pay.**

But to really excite consumers and go beyond the safety/hygiene factors that are now expected, retailers can look at how they can create a more experiential shopping environment, such as providing places to hang out and offering product demonstrations.

Even so, consumers' hygiene concerns still largely outweigh experiences when it comes to post COVID-19 shopping habits. As a result, brands must continue to also replicate the in-store experience online. For instance, **18% of internet users say a more personalized experience (e.g. a personalized shopper) would persuade them to return to stores.** However, perhaps for now, schemes such as John Lewis' **personal shopping via Zoom** may also do the trick.

SAFETY IS THE PRIMARY DRIVER TO GET CONSUMERS IN STORE

% of internet users in the U.S./UK who say the following would make them more likely to visit/buy a product in store

Effective safety measures (e.g. social distancing)	44%
Quicker ways to pay (e.g. self-service, in-app checkout)	33%
A place to hang out/relax (e.g. cafes)	18%
A more personalized experience (e.g. personal shopper)	18%
Product demonstrations	16%
Click-and-collect options	16%
Expert advice (e.g. one-to-one consultations)	13%
Interactive experiences (e.g. art exhibitions)	12%
Live music	10%
Ways to connect with the brand on social media in store	9%
Immersive experiences (e.g. using augmented reality)	8%
None, I'd prefer to shop online where possible	13%

In the U.S. the most important factors when shopping in store are the availability of products (61%), a clean/tidy store (61%), and a convenient location (54%)

EXPLORE DATA

Question: Typically, which of the following would you rather do? (Shop online | Shop in-store)

Source: GlobalWebIndex Q2 2020

Base: 179,219 internet users aged 16-64

Question: What would make you more likely to visit/buy a product in store?

Source: GlobalWebIndex Custom Research July 2020

Base: 2,000 (U.S.) & 1,001 (UK) internet users aged 16-64



Safer ways to pay

APAC is home to the highest proportion of mobile payment users, however, COVID-19 has spurred on their popularity in other regions around the world. This is predominantly driven by domestic providers. For instance, in South-East Asia, Grab Pay's growth has been very impressive - it's **increased from 46% to 52% in Singapore, 16% to 22% in the Philippines, and 39% to 57% in Malaysia since Q1 2019.**

Like with many trends accelerated by the pandemic, the most significant changes seen in contactless payments in 2020 have stemmed from regions and demographics where behaviors have traditionally been the most difficult to shift. Europe, North America, and particularly baby boomers have been the leading drivers of adoption of mobile payments.

Aside from mobile payments, contactless methods are now more in demand. From our custom research in the U.S./UK we found that **the main reasons consumers are using more contactless**

payment methods in stores since the COVID-19 outbreak are concerns about hygiene (39%), faster checkout (35%), and for security (21%).

And contactless card payments have a much wider appeal than mobile payments: around 40% of Gen Z and millennials say they've used contactless card payments more since the outbreak, while this is higher than Gen X (35%) and baby boomers (29%) the difference is relatively narrow. On the other hand, **when it comes to mobile payments, around 30% of Gen Z and millennials are using them more compared to 14% of Gen X and 6% of boomers.**

It's also possible that QR codes which **never took off** in quite the way many predicted, may see an upsurge in usage post COVID-19, especially considering their ease of use as part of **track and trace schemes.** However, as of yet, only a small minority report using them more since the outbreak.

INCREASES IN CONTACTLESS PAYMENT OPTIONS

% of U.S./UK internet users who say they've done the following more since the coronavirus outbreak

 **37%**

Used contactless card payments

 **29%**

Ordered and paid ahead using an app

 **28%**

Used P2P payments (e.g. PayPal, Venmo)

 **20%**

Used mobile payments (e.g. Apple Pay)

 **7%**

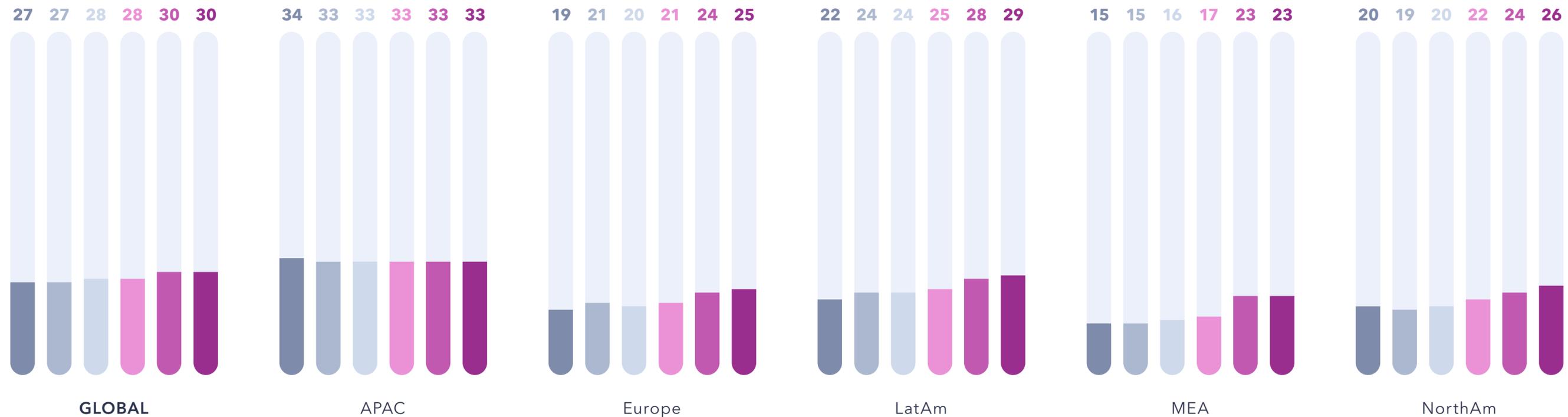
Used QR code payments

Question: Which of the following, if any, have you started to do more of since the coronavirus outbreak?
Source: GlobalWebIndex Custom Research July 2020
Base: 2,000 (U.S.) & 1,001 (UK) internet users aged 16-64

Safer ways to pay

MOBILE PAYMENT USAGE INCREASES ACROSS MOST REGIONS IN 2020 | % of internet users who have used a mobile payment service in the last month

● Q1 2019 ● Q2 2019 ● Q3 2019 ● Q4 2019 ● Q1 2020 ● Q2 2020



Two-thirds of internet users in the U.S./UK have started using contactless payment methods more because of the COVID-19 outbreak

EXPLORE DATA

Question: Which of these have you done on your mobile in the last month? (Used a mobile payment service such as Apple Pay or Samsung Pay)
Source: GlobalWebIndex Q1 2019-Q2 2020
Base: 952,949 internet users aged 16-64

Augmented Reality, a Gen Z appeal?

Augmented Reality (AR) is an interactive experience of a real-world environment where objects that reside inside that world are enhanced by computer-generated perceptual information.

As the world shut-up-shop in the wake of COVID-19 and as safety concerns remain paramount, AR offers an opportunity for many brands to safely bring a virtual representation of their products to their consumers.

Among all internet users in the U.S./UK, they're most likely to want to try out its uses inside their homes such as furniture layout (31%) or virtually repainting the walls (31%). Try-on applications, such as glasses (26%), clothing (26%), or makeup (17%) are less popular.

While **over a third are not at all interested in using the technology**, this is a sentiment felt most by older generations.

Moreover, **for all uses of AR, U.S. internet users are slightly more interested**, suggesting the technology has been adopted more so there than in the UK currently. The trick to its continued growth and success will be for marketers to help consumers to better understand the technology and for developers to make it easier to use.

Just 19% of Gen Z are not interested in using AR, compared to 56% of baby boomers

AR: MOST IN-DEMAND OPTIONS | % of internet users in the U.S./UK who would be interested in trying the following uses of AR

Gen Z (16-23)	Millennials (24-37)	Gen X (38-56)	Baby Boomers (57-64)	
38%	33%	28%	26%	Visualizing different paint colors on your walls
37%	34%	26%	19%	Seeing realistic versions of products (e.g. to check size)
37%	32%	20%	11%	Trying on clothing or jewelry
35%	28%	17%	9%	Trying on shoes by pointing the camera at your feet
35%	35%	28%	23%	Visualizing virtual furniture in your home
28%	27%	26%	24%	Trying on glasses virtually
26%	24%	11%	6%	Using the selfie camera to try on makeup
24%	16%	8%	5%	Watching virtual models wear the latest fashion
19%	25%	43%	56%	I'm not interested in using AR

Question: Which of the following AR experiences, if any, would you be interested in trying?
Source: GlobalWebIndex Custom Research July 2020
Base: 2,000 (U.S.) and 1,001 (UK) internet users aged 16-64

• TREND IN ACTION •

Online healthcare ramps up



As a result of COVID-19, demand for telehealth services has soared. In our [digital healthcare report](#) from April we found that **half of U.S. and UK consumers say the ability to consult with a doctor by a phone/video call instead of in-person would help them manage their health more effectively.**

Consumers are increasingly taking their health into their own hands, and researching or buying medicines online is a part of this. In the U.S., 17% of internet users have compared the price of drugs online and 27% have refilled a prescription online. **And among urban dwellers specifically, 1 in 10 buy medicines from ecommerce sites such as Amazon.**

20% of internet users in the U.S. consult a doctor or healthcare professional online when they're feeling unwell, rising to 24% among high-earners

According to [analysis](#) from the Centers for Medicare & Medicaid Services (CMS) Office of the Actuary, **U.S. home health spending officially hit \$102.2 billion in 2018 and it's projected to hit \$186.8 billion by 2027.** The online healthcare purchase journey has been fast-tracked by the pandemic, and suppliers – especially in the U.S. – must know how to reach their audience online.

Moreover, the rise of telehealth alongside consumers' proactiveness toward their health by using online sources is key in helping to create a more efficient, preventative, and in the long-run, more cost-effective healthcare model.

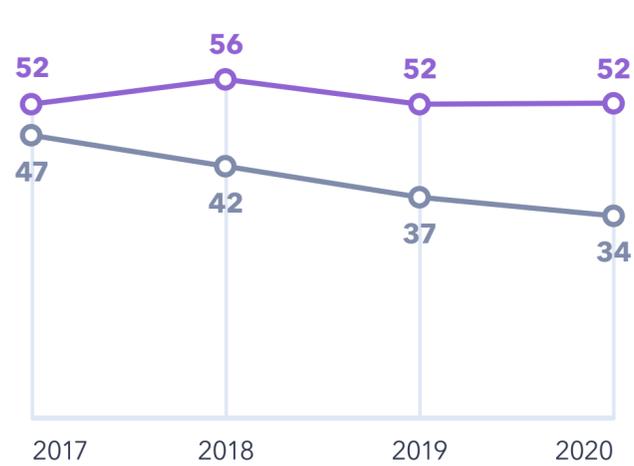
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Commerce

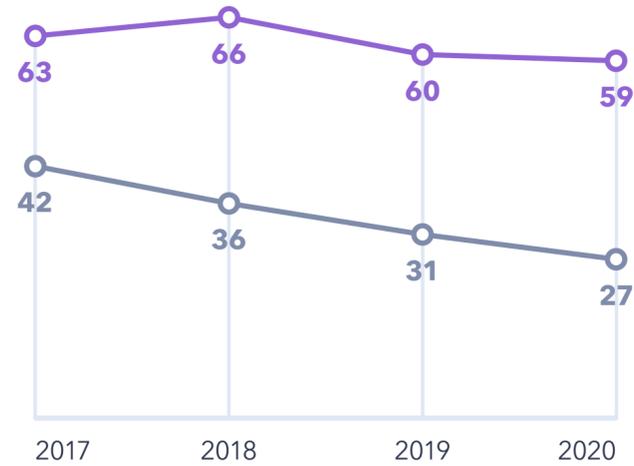
The ecommerce landscape

Mobile vs. PC purchases

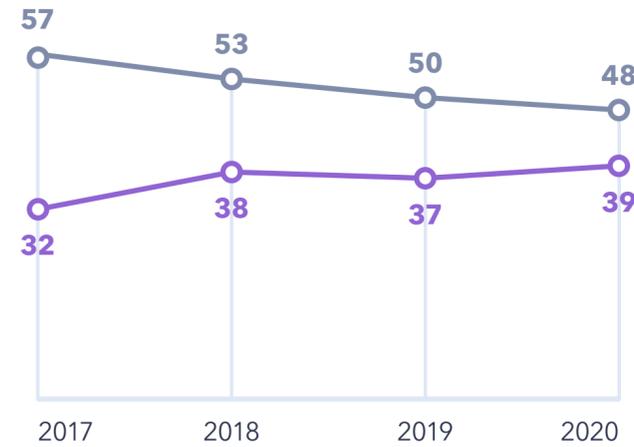
GLOBAL PREFERENCE TO PURCHASE PRODUCTS ONLINE VIA MOBILE | % of internet users who have purchased a product online on the following devices



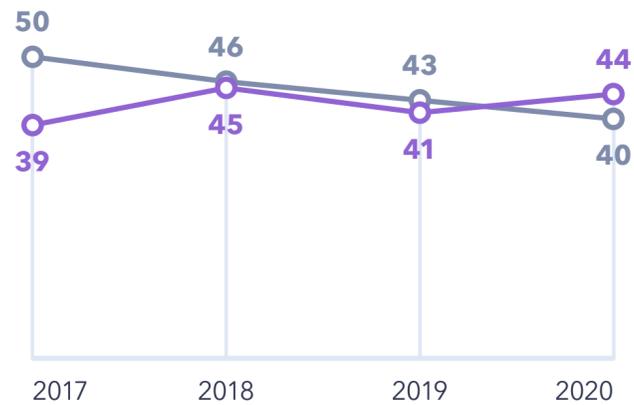
GLOBAL



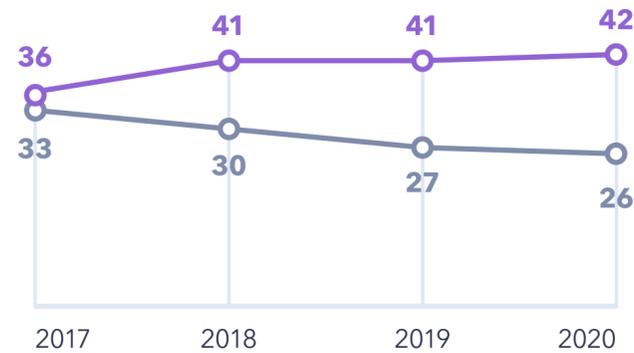
APAC



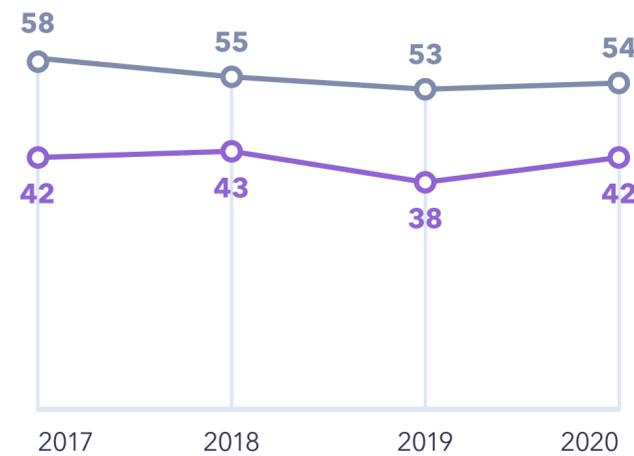
Europe



LatAm



MEA



NorthAm

○ On PC/Laptop
○ On Mobile

Globally, half of baby boomers have purchased a product on a PC/Laptop in the last month, compared to just 27% of Gen Z, who are more inclined to use mobile

[EXPLORE DATA](#)

Question: In the past month, which of the following things have you done on the internet via any device? (Purchased a product online)
Source: GlobalWebIndex Q2 2017-Q2 2020 (averages of all waves conducted each year)
Base: 230,610 (2017), 391,130 (2018), 493,256 (2019), and 268,427 (2020) internet users aged 16-64

• TREND IN ACTION •

The Amazon boom continues



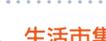
The UK online grocery market is **forecast** to grow 76.2% to £19.5bn in 2020 following the significant uplift in demand amid the COVID-19 lockdown restrictions. Amazon is keen to bypass traditional supermarket loyalties and carve out its own slice of the industry. In the UK, Amazon has announced that larger orders on Amazon Fresh will be free to members of Prime, in response Tesco is **introducing** free delivery to its Clubcard Plus members.

Over half of UK internet users have used the Amazon app in the last month

And in May Amazon **reinvested** \$4bn of profits into creating a virus-free supply chain, developing PPE equipment, cleaning its facilities, and crucially, developing COVID-19 testing. With **44% of consumers globally concerned about a second wave and the same percentage expecting the outbreak to last longer than a year**, Amazon is positioning itself for the near future – no other company has the capital and investment available to do this on such a huge scale.

Top commerce apps by country

TOP COMMERCE APP BY COUNTRY | % of internet users in each country who have used the following apps in the past month

Argentina	64%		MercadoLibre	Ireland	43%		Amazon	Saudi Arabia	23%		Amazon
Australia	36%		eBay	Israel	22%		AliExpress	Singapore	34%		Carousell
Austria	57%		Amazon	Italy	62%		Amazon	South Africa	26%		Gumtree
Belgium	20%		Amazon	Japan	28%		Amazon	South Korea	6%		Amazon
Brazil	41%		MercadoLibre	Kenya	15%		Amazon	Spain	57%		Amazon
Canada	45%		Amazon	Malaysia	9%		eBay	Sweden	15%		Wish
China	47%		Alipay	Mexico	46%		MercadoLibre	Switzerland	19%		Wish
Colombia	40%		MercadoLibre	Morocco	13%		AliExpress	Taiwan	15%		Buy123
Denmark	15%		Wish	Netherlands	18%		AliExpress	Thailand	10%		Amazon
Egypt	24%		OLX	New Zealand	23%		Trade Me	Turkey	21%		Amazon
France	41%		Amazon	Nigeria	23%		AliExpress	UAE	34%		Amazon
Germany	52%		Amazon	Philippines	11%		Amazon	UK	52%		Amazon
Ghana	8%		Amazon	Poland	62%		Allegro	U.S.A.	51%		Amazon
Hong Kong	40%		Taobao	Portugal	31%		OLX	Vietnam	9%		Amazon
India	47%		Amazon	Romania	15%		Wish				
Indonesia	17%		OLX	Russia	27%		AliExpress				

It has been over a year since Amazon **eclipsed** Walmart as the biggest retailer in the world. It should come as no surprise then that of the 46 markets we track, it's the top commerce app used in 21 of these countries. Having said this, there are clear market differences - especially when looking at **China's unique ecommerce landscape. The top apps there are Alipay (47%), Taobao (44%), and Tmall (36%). Similarly, in Latin America, MercadoLibre is the clear market leader at 45%, followed by Amazon at 30%.**

55% of internet users have used one of the 26 commerce apps we track in the last month

Despite this, the definition of commerce apps is constantly evolving. As traditionally one-dimensional app-based services look to branch out into new commercial avenues, the landscape of commerce apps continues to blur. For instance, takeaway apps such as Deliveroo, Uber, and Just Eat are **racing** to expand into grocery delivery services which will likely win over some consumers from the market leaders in this industry.



Question: Which of the following apps have you used in the past month?
Source: GlobalWebIndex Q2 2020
Base: 175,737 internet users aged 16-64

04

Commerce

Digital goods & subscriptions

Media consumption changes amid COVID-19

Enduring a lockdown indoors, consumers around the globe began to consume more media. While some people may develop a taste for this new media and continue to use it once this is all over, it would be a mistake to assume the majority of these behavior surges will outlast the outbreak.

Since the first two waves of our COVID-19 research in March and April, the numbers saying they are spending more time doing various in-home and media consumption activities have trended downward. This is especially true of young people. While they enjoyed a whole host of activities during the start of lockdown, the only significant increases over all five waves of research are for watching streaming services and using social media.

For older generations, it's a slightly different scenario. **For baby boomers, for example, the data indicates a deepening of engagement across lots of media, but particularly for digital media such as social media and online TV** which we'd usually associate more with younger age groups.

Not only are older generations' media habits becoming more diverse, but new users are also flooding the market. **Across 18 countries surveyed in early July, 38% of people who said they weren't watching TV streaming services before the outbreak now report doing so. When we add these fresh users to the existing base of TV and film streamers, this represents a 12% growth during the outbreak in these markets.**



The streaming wars continue

MILLENNIALS LEAD THE PACK IN DIGITAL PURCHASES | % who have paid for the following digital services in the last month

26%	29%	17%	22%	13%	19%	9%	18%	22%	8%	10%	7%	13%	8%	5%	Gen Z (16-23)
33%	28%	20%	24%	15%	20%	11%	15%	20%	10%	11%	9%	13%	9%	7%	Millennials (24-37)
29%	19%	15%	18%	11%	14%	9%	10%	12%	7%	7%	6%	9%	6%	5%	Gen X (38-56)
23%	12%	9%	9%	7%	7%	5%	5%	5%	4%	4%	4%	4%	2%	2%	Baby Boomers (57-64)
▲ Movie/TV streaming	▲ Music streaming	▲ Movie/TV download	▲ Music download	▲ e-Book	▲ Mobile app	▲ News service	▲ Study programs	▲ Mobile game	▲ Web service	▲ Software package	▲ Online magazine	▲ In-app purchases	▲ Digital gifts	▲ Dating service	

Given the considerable media consumption shifts during the pandemic and the popularity of streaming, this has been a crucial time for digital content providers. **Since 2015, the proportion of total internet users purchasing digital content has increased from 52% to 70% in 2020.** And today, the top purchaser of digital content is China (82%), followed by India (77%).

Overall, streaming services take the top spot for digital purchases. **29% of internet users globally have paid for a movie/TV streaming service in the last month, while 24% have paid for a music streaming service.**

71% of internet users have purchased digital content in the last month

In our March COVID-19 research we **discovered** that amid global lockdowns streaming music wasn't as central to our lives as activities that keep us in touch with what's going on around the world. This was supported by evidence from **Spotify figures**. For instance in Italy, which at the time was the epicenter of the pandemic, Spotify experienced a drop in the average number of streams by approximately 4-million when compared to February of 2019.

This helps explain why **between Q1 and Q2 2020, those who had paid for a music streaming service dropped marginally among all generations apart from Gen Z.** Their older counterparts are perhaps more likely to associate streaming music with commuting and with over half of consumers avoiding public transport, this was reflected in their digital content preferences. For Gen Z, on the other hand, streaming music has become more popular than streaming TV/movies. Over lockdown a **plethora of trends** have accelerated this demand among young internet users, including artists finding success via TikTok, increased demand for quarantine playlists, and livestream gigs.

EXPLORE DATA

Question: In the last month, which of these have you paid for?
Source: GlobalWebIndex Q2 2020
Base: 179,219 internet users aged 16-64

The subscription economy

There's now practically a subscription for everything – from pet food and **coffee**, to cosmetics and everything in between. But even with the vast number of subscriptions on offer, consumers are primarily drawn to subscriptions based around entertainment and food.

Close to half of consumers in the U.S./UK say they'd be interested in buying a subscription to an online TV streaming service and 31% would be interested in buying a food/grocery subscription in the next 3-6 months. That's not to say that other subscription categories don't have appeal though. For example, 31% of millennials say they're interested in subscribing to a coffee subscription and 22% of Gen Z have their eyes on a beauty/cosmetics subscription in the near future. There's still potential for other categories, they're just a much lower priority on consumers' subscription lists.

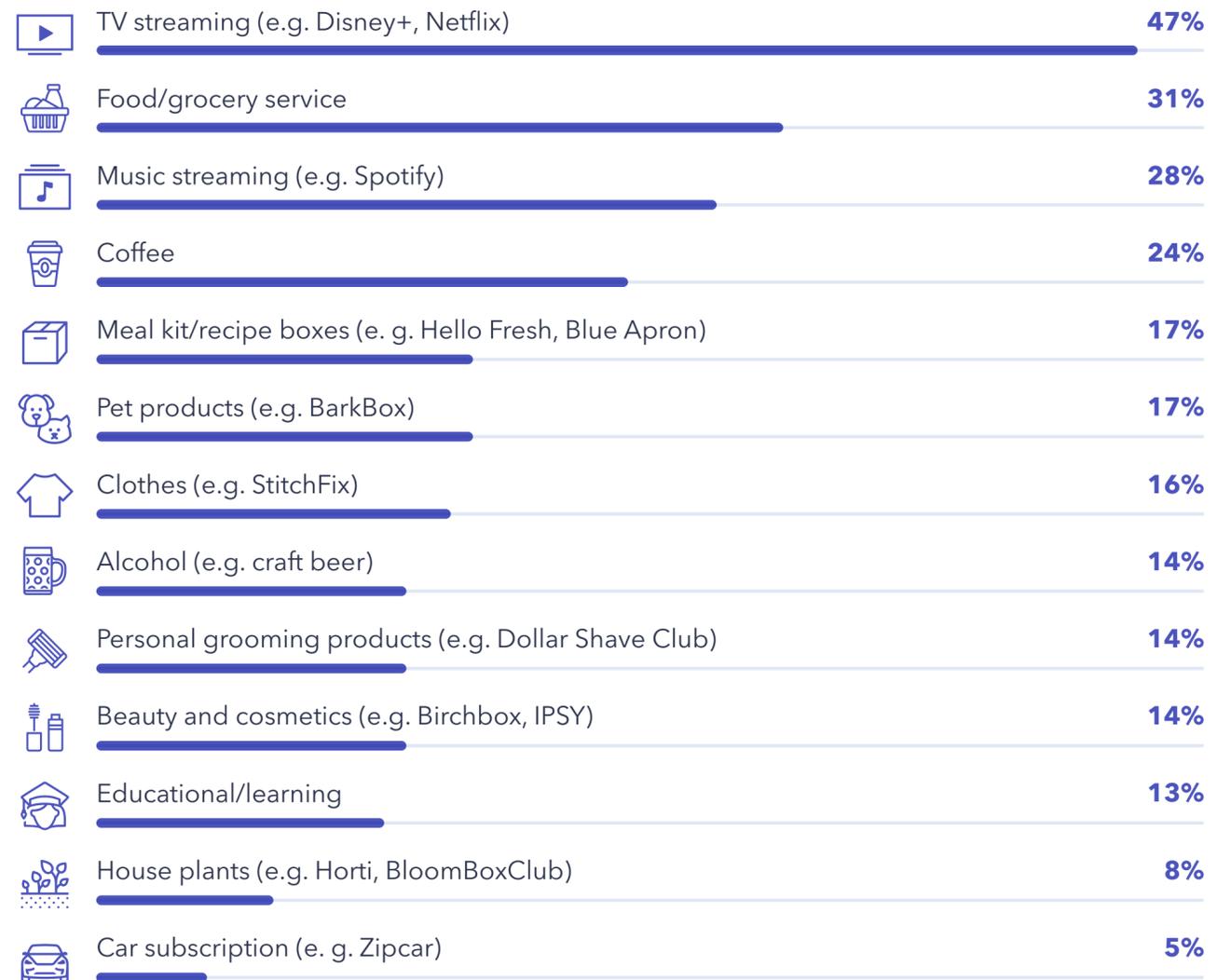
31% of consumers say that the main reason for purchasing a subscription is because it's cheaper/better value for money

A major reason for this is that to get consumers on board, **they really need to be convinced about the continuous value they're getting** – especially as having different subscriptions takes a toll on consumers' purse strings. For TV streaming services, their massive content libraries make this an easier sell; while for food providers, the sheer convenience and access to different ingredients are major benefits – particularly as cooking took off during lockdown.

Our latest global data shows that **two-thirds of consumers globally would rather own a product/service than pay to access it.** This really tells us that people don't want a subscription for absolutely everything. And as the economic toll of COVID-19 continues, consumers will certainly be more selective about who they sign up with.

POPULARITY OF SUBSCRIPTION CATEGORIES

% of internet users in the U.S./UK who would be interested in buying a monthly subscription to the following in the next 3-6 months



Question: Which of the following products/services, if any, would you be interested in buying a monthly subscription to in the next 3-6 months?
Source: GlobalWebIndex Custom Research July 2020
Base: 2,000 (U.S.) and 1,001 (UK) internet users aged 16-64

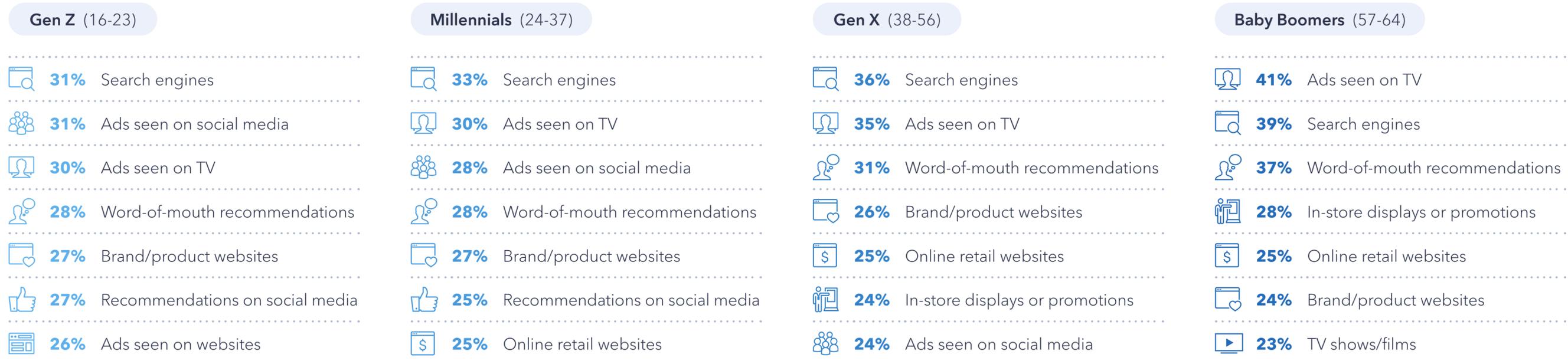
05

Commerce

The purchase journey

Brand discovery: a generation game

TOP 7 WAYS TO DISCOVER BRANDS | % of global internet users in each generation who discover brands via...



Search engines (34%) and ads on TV (32%) continue to stand apart as the top ways consumers discover brands. However, as time spent on different forms of media has increased in recent years, brand discovery through other channels is increasing also. This is predominantly true of younger consumers who have a more diverse mix of media consumption. Gen Z's preferred methods of brand discovery lean more heavily on social media. **Nearly a third of Gen Z discover brands**

via ads on this medium, compared to the average of just 27%. That said, social media is not just a Gen Z obsession, ads seen via this platform feature in the top 7 ways in which both millennials and Gen X also typically discover new brands and products.

And brand discovery on social media goes beyond solely traditional advertising - influencer marketing and expert video-based content also play a key role. For instance, **this**

year 17% of Gen Z have discovered a new brand/product from a vlog and 19% have done so via endorsements by celebrities or well-known individuals. Our recent [report in partnership with Influencer](#) found that among **consumers who follow influencers in the U.S./UK, the top 3 things they value from discovering products through creators are: seeing the product in action (40%); finding products they wouldn't have otherwise (35%); and offers/promotions (30%).**

Between Q3 2019 and Q2 2020, **we also see an uptick in baby boomers discovering ads through websites, ads seen on social media, recommendations/comments on social media, and ads seen before online videos or TV shows start to play.** As this group absorbs more media, brands have a greater opportunity to position themselves for discovery and ensure they're providing an up-to-date and targeted marketing mix.

EXPLORE DATA

Question: How do you typically find out about new brands and products?
Source: GlobalWebIndex Q2 2020
Base: 179,219 internet users aged 16-64

Brand research in a social media era

TOP 7 WAYS CONSUMERS INTERACT WITH BRANDS ONLINE

% of global internet users who say they have done the following in the last month

 **51%**

Visited a brand's website

 **25%**

Watched a video made by a brand

 **23%**

Liked/followed a brand on a social network

 **22%**

Read a newsletter from a brand

 **22%**

Visited a brand's social network page

 **17%**

Used a "share" button on a website

 **17%**

Downloaded/used a branded app

While **47% of consumers describe themselves as loyal to the brands they like, a greater proportion (55%) research a product online before buying it.** As the internet – and social media especially – has opened up new ways to research brands or products online, they can no longer solely rely on loyalty. Instead, they must look to compete with competitors in the online research journey.

The go-to research channel is search engines (53%), however social networks take second place (44%) and they continue to grow. **Gen Z leads the pack here – for them social networks have overtaken search engines as the most popular method.** But even **among baby boomers, 1 in 4 now use social networks to actively learn more about a brand.** Further evidence of their evolving media mix.

Online research is also not just for high-cost products. **While 34% of internet users have researched electronics online before purchasing in the last month, 29% did this for grocery products and 26% did so for personal care products.**

Ultimately, brands across all industries at every price-point have a high percentage of their audience researching products online before purchasing. Therefore, they should be looking to use their online profiles to engage their audience and win them over.

While visiting a brand's website is by far the top way consumers interact with brands online, other opportunities to engage with them should not be overlooked especially as they may be more appropriate for certain audiences. For instance, **North American consumers are 29% more likely to read an email from a brand, while in Latin America they're 27% more likely to ask a question to a brand on social media.**



Very few brands seem to be optimizing their social content for these social search activities, but the good news is that even simple changes can increase a brand's visibility in social search, such as adding more generic hashtags to social media posts, in addition to brand or product-specific tags

Simon Kemp, CEO & Founder of Kepios

 **EXPLORE DATA**

Question: Which of the following actions have you done online in the past month?

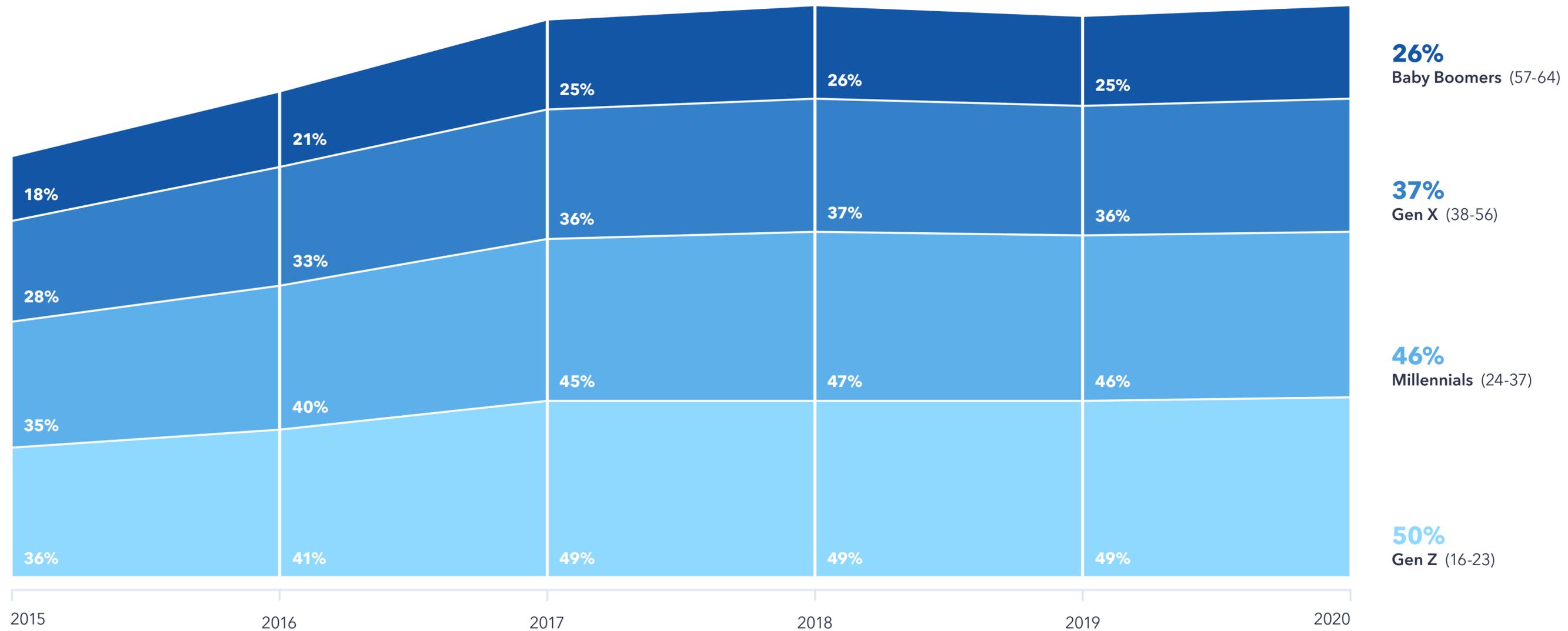
Source: GlobalWebIndex Q2 2020

Base: 125,195 internet users aged 16-64

Brand research in a social media era

THE RISE OF SOCIAL MEDIA FOR PRODUCT RESEARCH

% of global internet users in each generation who use social networks to learn more about brands, products, and services



EXPLORE DATA

Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? (Social networks)

Source: GlobalWebIndex Q2 2015-Q2 2020

Base: 150,112 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), 598,185 (2019), and 354,764 (2020) internet users aged 16-64

“Add to basket”

To capture consumers at the research phase and drive them to make a purchase, brands must know what incentives they’re looking for. A good experience here is pivotal to brand loyalty and repeated business down the line.

Free delivery is key. Over half of internet users globally say this would most increase their likelihood of buying a product online, reaching a peak of 65% among boomers. However, this has gradually fallen from 61% among all internet users since 2015 – it’s likely that as consumers have become more accustomed to the efficiency of online shopping, this additional cost has become *slightly* more acceptable.

Meanwhile, **financial incentives, such as coupons and discounts, are now the second highest driver to purchase, and this has increased from 35% to 41% since 2015.** Ultimately, consumers still see shopping online as a way to save and for the majority that requires

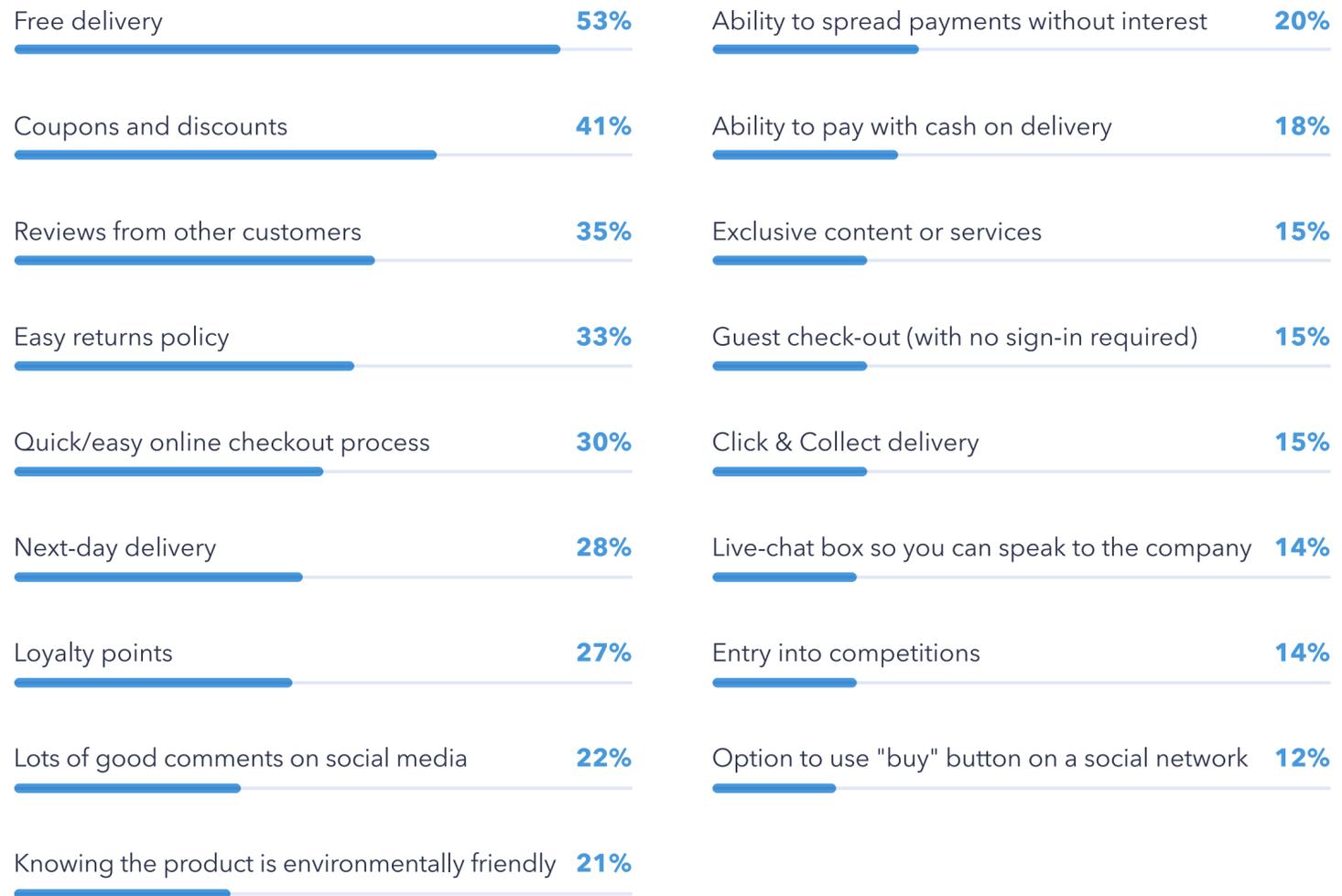
free delivery; however many are also increasingly driven by these other financial measures as well.

Beyond this, brands should also be considering how they can make the purchasing of a product online as efficient as possible. **Easy returns, quick checkout, and next-day delivery are all highly cited as key drivers to purchase. All three of which are more important to medium/high income earners** – making efficiency key to obtaining audiences with higher spending powers.

Brands must also be aware that with an increased online presence comes a more immediate, and visible, accountability to how satisfied consumers are. Brands that build a good relationship with happy customers are best-set to achieve even more success going forward. **Over a third of internet users say reviews from other customers are likely to drive them to making a purchase; while 22% said lots of “likes” or good comments on social media are important - this has increased from 18% in 2015.**

FINANCIAL INCENTIVES AND INCREASED EFFICIENCY DRIVE PURCHASES ONLINE

% of internet users who say that the following would most increase their likelihood of buying a product when shopping online



EXPLORE DATA

Question: When shopping online, which of these features would most increase your likelihood of buying a product?

Source: GlobalWebIndex Q2 2020

Base: 125,195 internet users aged 16-64

Building the brand-consumer relationship

TOP BRAND ACTIONS

% of internet users who want brands to do the following



TOP MOTIVATIONS FOR BRAND ADVOCACY

% of internet users who say the following would motivate them to promote their favorite brand online



Understanding how consumers discover and research brands, and what drives them to purchase is just the start. To really gain consumers' loyalty and ultimately turn them into brand advocates, brands need to understand what consumers want them to do and what matters to them.

When it comes to brand actions, among all internet users, **environmental and social responsibilities come up top alongside more practical requirements, such as listening to customer feedback.**

But other, more specific, actions vary depending on a brand's audience. For example, **among those who describe themselves as fashion conscious, 25% want brands to run customer communities/forums - seven percentage points higher than the average user.**

Brands that best understand how their audience differentiates from the average consumer are best-set to build a long term relationship by providing for their specific needs.

For instance, **among consumers who have visited a brand's web store in the last month, just 18% would be more likely to buy a product if they get access to exclusive content or services. However, among those who had visited a brand's app store, this rises to 27%.** Users of brands' apps are also more likely to want a live chatbot or click and collect options. Therefore, brands who have a predominantly app-based audience would be wise to take note of these preferences.

Finally, to convert their customers into brand advocates, brands need to be prioritizing quality, financial incentives, and great customer service. But again this isn't the complete story. **In the U.S., love for the brand actually beats customer service to third place, with 43% of U.S. consumers saying this would motivate them to promote a brand.**

EXPLORE DATA

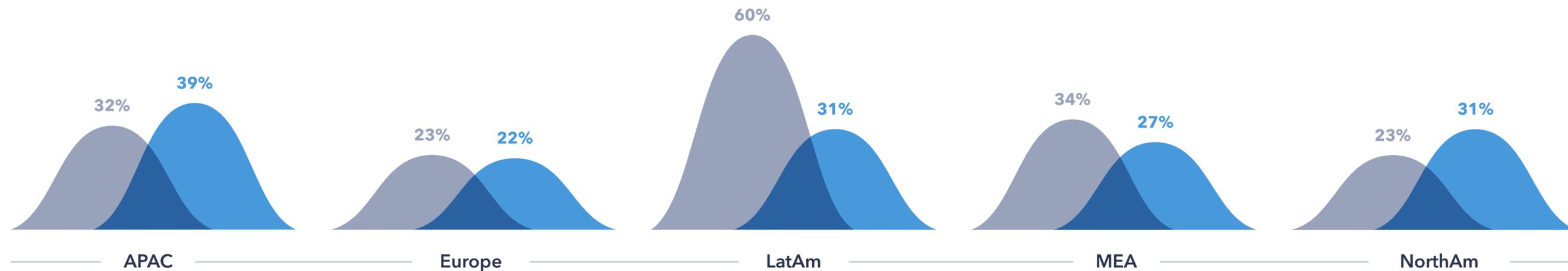
EXPLORE DATA

Questions: Which of these things do you want brands to do? | What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q2 2020
Base: 125,195 internet users aged 16-64

What's happening in search?

NEW WAYS OF SEARCH | % of internet users in the following regions who have performed a search on mobile in the last month via...

● An image recognition tool (e.g. Google Lens, Pinterest Lens) ● Voice search or voice command tools (e.g. Siri, Cortana)



As we've seen, the mobile is fast emerging as the preferred purchase method for consumers when shopping online. How consumers search for products and services, however, is changing.

Unlike traditional search engines, or the more contemporary social network search, these new techniques yield much narrower (sometimes even singular) sets of results. This ultimately means that the stakes have gotten so much higher. **If businesses are not optimized for these new formats, they won't show up, and stand to lose out.**

The most important developments here are voice search (such as Siri) and image search (such as Google Lens). **Globally they're as popular as one another. In the last month 34% of internet users have used voice search (increasing from 25% in 2017) and 33% have used an image recognition tool on their mobiles.**

Global brands based in Europe and North America cannot be caught off guard - this revolution in search is happening fastest in other regions. **For instance, internet users**

in Latin America are almost twice as likely to use an image recognition tool than the global average. Moreover, while voice search is **primarily a mobile activity** there has been an uptick in smart home product ownership in Europe and North America since the end of last year, especially among younger consumers.

Global companies must optimize for these new technologies right now, to capture both the demand in specific regions today and the inevitable embracing of this technology on a global scale tomorrow. And crucially, they

mustn't focus on just one method of search. Search has evolved from search engines to social search and now to voice and image. Companies that learn how their customers use each of these simultaneously will be well-placed to succeed.

47% of all internet users have used either voice or image search in the last month on mobile

[EXPLORE DATA](#)

[EXPLORE DATA](#)

Questions: Which of these have you done on your mobile in the last month? (Used an image recognition tool) | In the past month, which of the following things have you done on the internet via mobile? (Used voice search or voice command tools)
Source: GlobalWebIndex Q2 2020
Base: 179,219 internet users aged 16-64

• TREND IN ACTION •

Livestream Shopping



Livestreaming, specifically in ecommerce, has become explosively popular in China. Online influencer Amanda Xie, alongside two other influencers, recently **sold** 300 Tiffany necklaces (each valued at \$3,500) in a broadcast to 5,000 people on popular social commerce app Xiaohongshu. **Among consumers who follow vloggers in China, 30% used this app in Q1 2020, rising to 35% in Q2 and to 46% among women specifically.**

The Chinese livestreaming market **reached** \$4.4 billion in 2018, growing 37% year-on-year and attracting a total of 456 million viewers. **Taobao is another app popular for shopping livestreams, 44% of all Chinese internet users have it - growing to 59% among Gen Z.**

But it's not just luxury retailers adopting this new medium of commerce, everyone from **Starbucks China** to **H&M's Monki** are betting big on this trend. The question now is, will it also take off in the West? Connie Chan, an expert on the relationship between China and Silicon Valley **believes** so, expecting the video-centric future of ecommerce to make its way over in the next 3-5 years.

Key implications

- ✔ **On-balance consumers have very low levels of confidence in their economies**, and while this fluctuates across the globe, brands must look for ways to support them in these trying times. They can't simply rely on brand loyalty for repeat business, they must work hard to incentivize their audiences to purchase.
- ✔ **While consumers have been delaying purchases since the start of lockdown, less are now willing to wait until the end of the outbreak.** This is good news for brands, but with the threat of a second wave still on the horizon and markets around the globe entering new seasons – as we saw with the slight uptick in demand for travel – purchase delays will continue to fluctuate. Brands should keep their ear to the ground to secure this demand where and when it emerges.
- ✔ **It would be a mistake to assume online shopping will maintain its current rate of intensity.** While it's now more popular than offline, as stores open up, consumers will return. Indeed demand for ecommerce will still be greater than before, but without a significant influx of new consumers this mode of commerce has only accelerated its predicted trajectory more quickly, rather than completely putting the traditional brick-and-mortar out of business.
- ✔ **If there's one industry that's seen the greatest change in consumer preference toward online, it's grocery shopping.** It's still used most in China however, while this demand is falling, elsewhere around the globe it continues to increase. This is where the ecommerce grocery giants are set to flourish.
- ✔ **When returning to stores, hygiene is front-of-mind for consumers.** Brands and retailers alike must be looking to work with both contactless and mobile payments, while recognizing the latter's appeal is primarily for younger shoppers.
- ✔ **Lockdown has changed how consumers absorb media.** Older generations specifically are consuming a greater variety of media. This is great news for brands and they should be optimizing their advertising to reach these consumers on platforms that would have previously been overlooked.



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.

Figures referring to our COVID-19 research are drawn from Wave 5 of a custom recontact study, among 15,271 internet users, fielded in 18 countries between June 29-July 2 2020. Countries included Australia, Belgium, Brazil, China, France, Germany, India, Italy, Japan, New Zealand, the Philippines, Poland, Romania, South Africa, Singapore, Spain, the UK and the U.S. We also reference our first four waves of research, fielded between March 16-20 in 13 countries (12,845 respondents), March 31-April 2 in 17 countries (15,079 respondents), April 22-27 in 17 countries (15,274 respondents), and May 19-26 in 20 countries (17,149 respondents). Our custom data considers where the pandemic has advanced or undercut key trends.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 across 46 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 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.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex’s Q2 2020 wave of research across 46 countries, with a global sample of 179,219 respondents.

Argentina	1,565	Morocco	954
Australia	4,124	Netherlands	1,313
Austria	1,290	New Zealand	1,278
Belgium	1,337	Nigeria	1,025
Brazil	5,773	Philippines	3,261
Canada	4,916	Poland	2,085
China	24,582	Portugal	1,309
Colombia	1,296	Romania	1,314
Denmark	1,293	Russia	3,649
Egypt	1,779	Saudi Arabia	1,518
France	5,172	Singapore	2,806
Germany	5,209	South Africa	1,564
Ghana	891	South Korea	1,297
Hong Kong	1,793	Spain	5,130
India	13,829	Sweden	1,278
Indonesia	5,193	Switzerland	1,306
Ireland	1,287	Taiwan	2,301
Israel	1,276	Thailand	3,935
Italy	5,206	Turkey	2,081
Japan	3,343	UAE	1,793
Kenya	1,048	UK	10,329
Malaysia	2,849	U.S.A.	25,670
Mexico	4,365	Vietnam	2,607

Notes on methodology

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](#).

INTERNET PENETRATION RATES: 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 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.

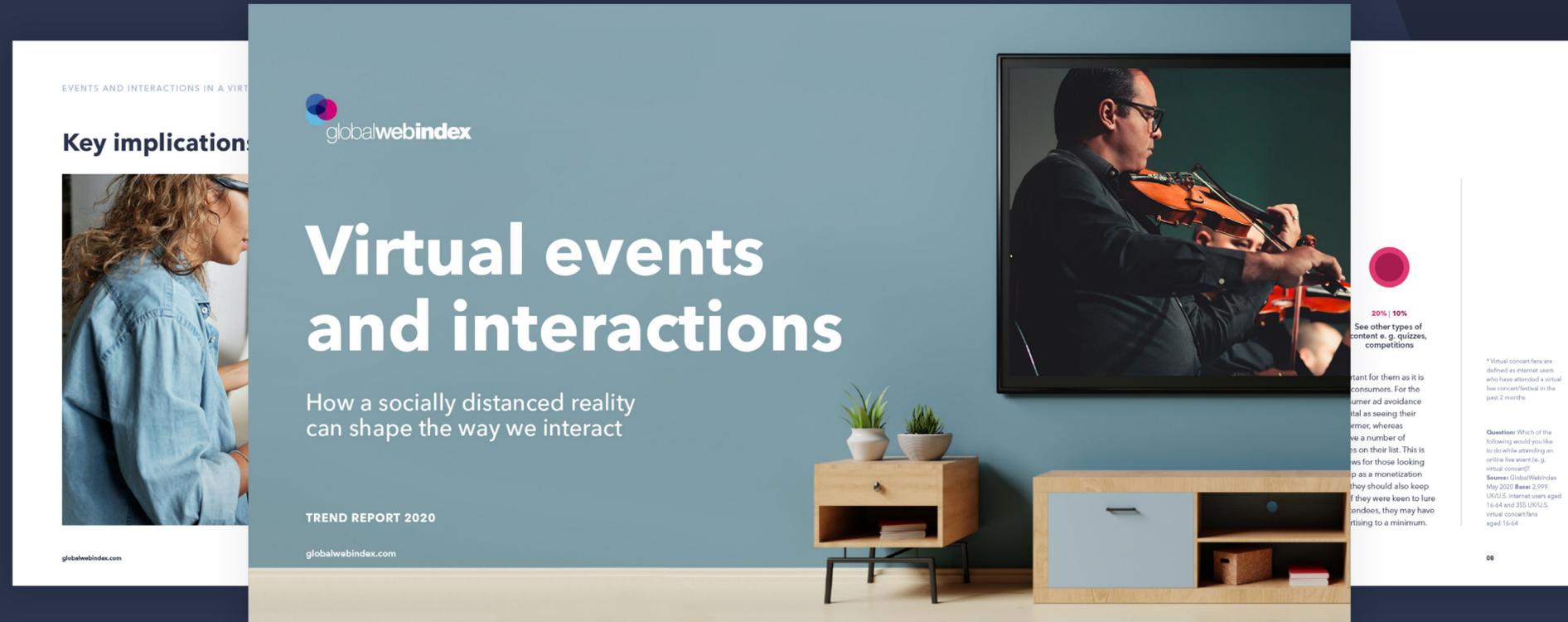
Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific 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.

INTERNET PENETRATION RATES

GlobalWebIndex's Forecasts for 2020 based on 2018 ITU data

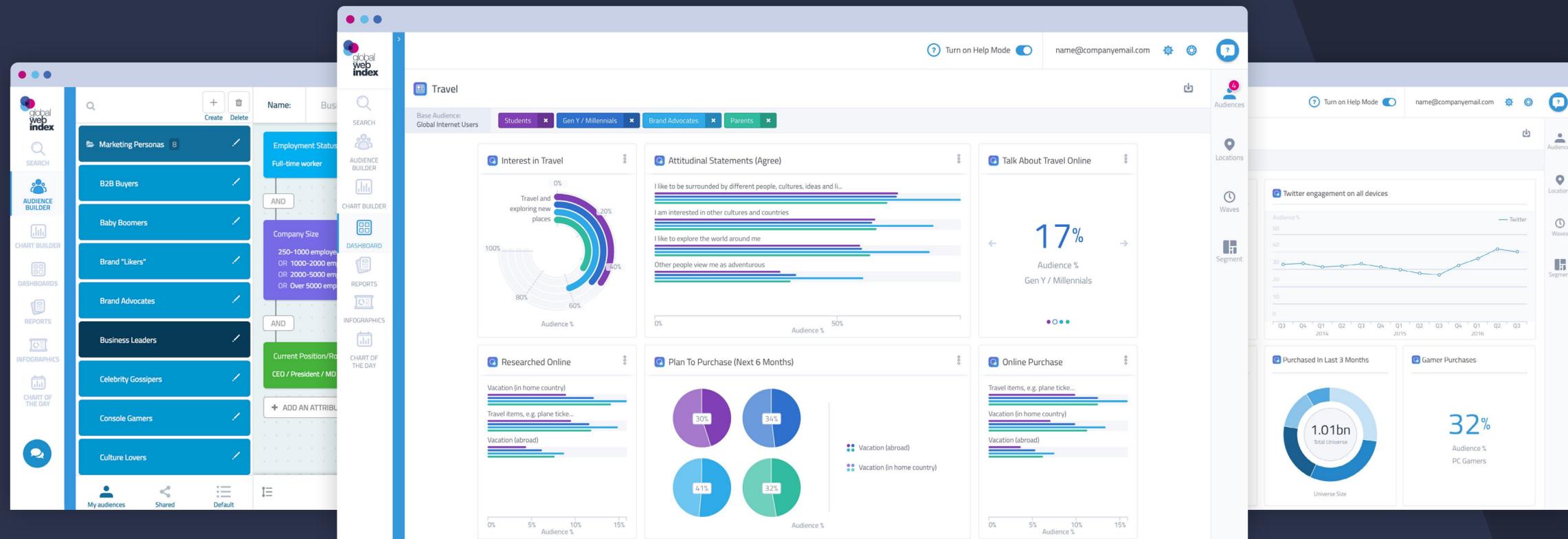
Argentina	78%	Morocco	69%
Australia	88%	Netherlands	93%
Austria	88%	New Zealand	93%
Belgium	89%	Nigeria	36%
Brazil	71%	Philippines	64%
Canada	94%	Poland	79%
China	59%	Portugal	78%
Colombia	66%	Romania	72%
Denmark	97%	Russia	80%
Egypt	54%	Saudi Arabia	83%
France	85%	Singapore	85%
Germany	88%	South Africa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



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