

Gen X

Examining the attitudes and digital behaviors of internet users aged 38-56

GW.



In this report

GWI Generation reports are designed to examine the digital behaviors of a particular generation – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population. In this report, we place the spotlight on Gen X – consumers aged 38-56.

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Methodology & definitions

All figures in this report are drawn from GWI’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, GWI 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 GWI’s Core survey via PC/laptop/tablet.

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.

When reading this report, please note that we use a mixture of global data from our ongoing quarterly research, custom recontact studies from the past 6 months 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+.

Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyper-link that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.

Click the dots to navigate



Sneak preview of our new platform

	Data point %	Universe	Index	Responses	Audience %
Someone in my household has a mental health issue	100	15.7K	84.9M	100	47%
	100	15.7K	84.9M	100	32%
	100	15.7K	84.9M	100	52%
	100	15.7K	84.9M	100	38%
	100	15.7K	84.9M	100	16%

1

Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report



Just click this icon to explore the data on the platform



Source Information about the source



Base Information about the base

Key insights

30% of internet users aged 16-64 are Gen X, rising to 39% in Europe and North America.

For some time now, Gen Z and millennials have commanded the attention of brands and marketers but Gen X's influence can't be underestimated. This is a huge audience with significantly more spending power and families to support. Moreover, because of COVID-19 their behaviors have become more digitally oriented and brands need to take note.

Gen X are on par with Gen Z for saying they're comfortable talking about their mental health.

This is despite the prominence of mental health campaigns targeting younger people. Gen X's wellbeing concerns are also up in other areas. They're paying greater attention to their health and fitness and are also expressing concerns for the environment – they're more likely than Gen Z and millennials to say they always try to recycle.

Gen X have maintained their lockdown-induced digital behaviors.

As lockdown restrictions came into effect, spikes in digital activity followed. For younger groups, it didn't take long for these spikes to settle down. For older groups, and Gen X in particular, their engagement continued to flourish. For instance, demand for TV subscription services jumped up during the pandemic, however through the latter part of last year Gen Z demand fell while Gen X behaviors remained stable.

They're spending more time on mobile as their social media usage continues to broaden.

In 2017, 77% of Gen X used Facebook on a monthly basis, a number that didn't change by Q3 2020. Instead growth is coming from other platforms like WhatsApp, TikTok, and Instagram – usage of the latter increased by +48% in the same time frame. This growth has come about as Gen X use their mobiles to do activities that were more often associated with desktops. In 2015, they spent an average of 1 hour and 52 minutes each day on mobile – today this stands at three hours.

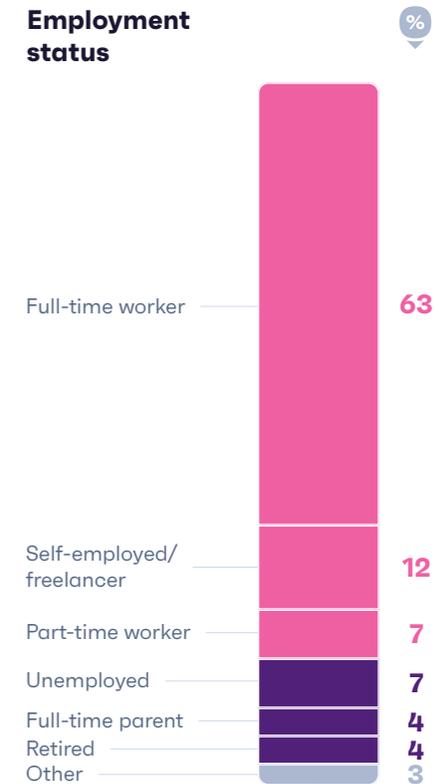
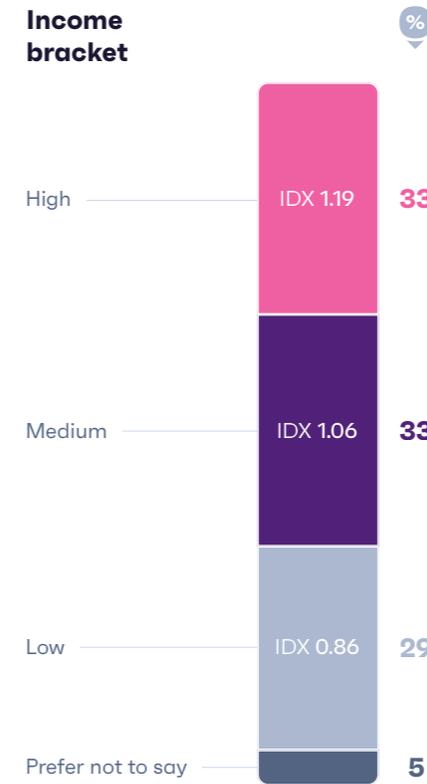
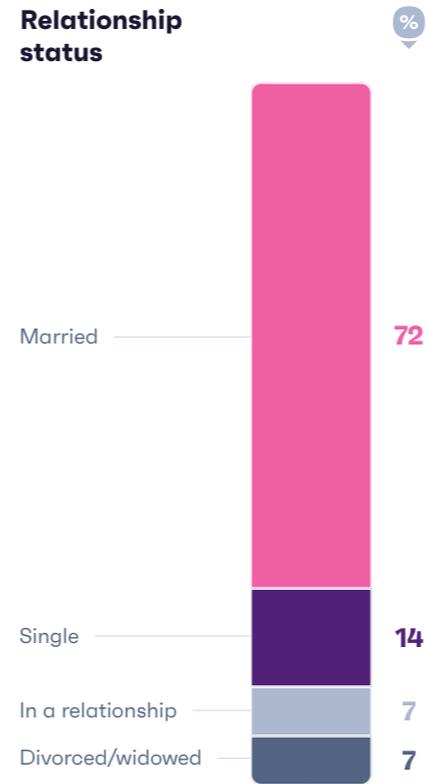
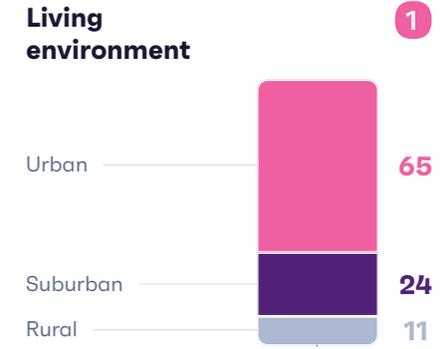
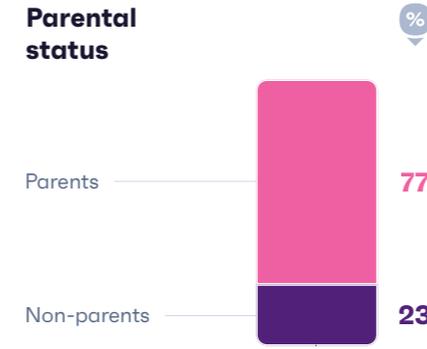
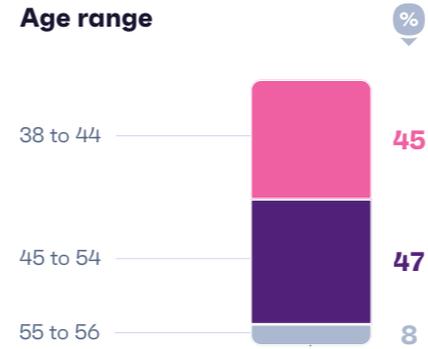
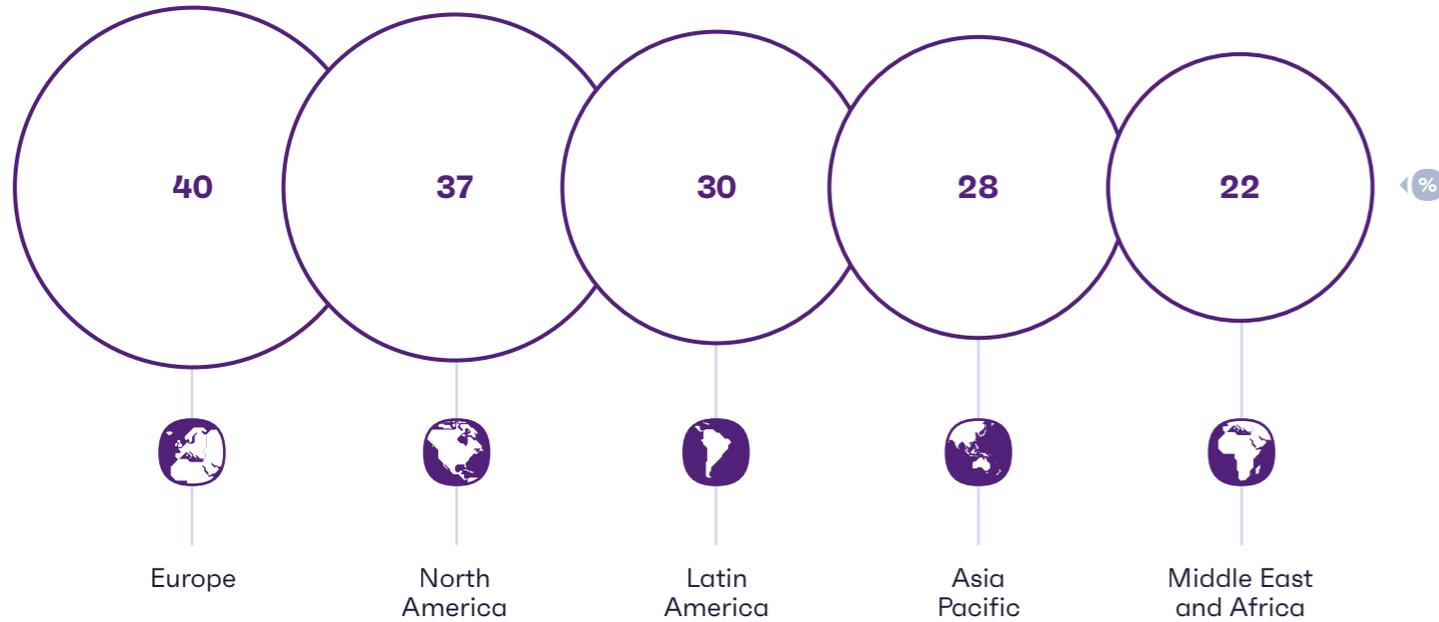
Gen X are less likely to avoid advertising online or use ad-blockers than Gen Z.

Gen X pay more attention to advertisements on their frequented media platforms so for advertisers they're much easier to reach than their younger counterparts. Beyond this, Gen X are far more likely to keep watching if they know and respect the brand. Ultimately, they trust other people's opinions. A third of Gen X rely on word-of-mouth recommendations when discovering new brands and 4 in 10 will turn to consumer reviews for research.

01

Profiling Gen X

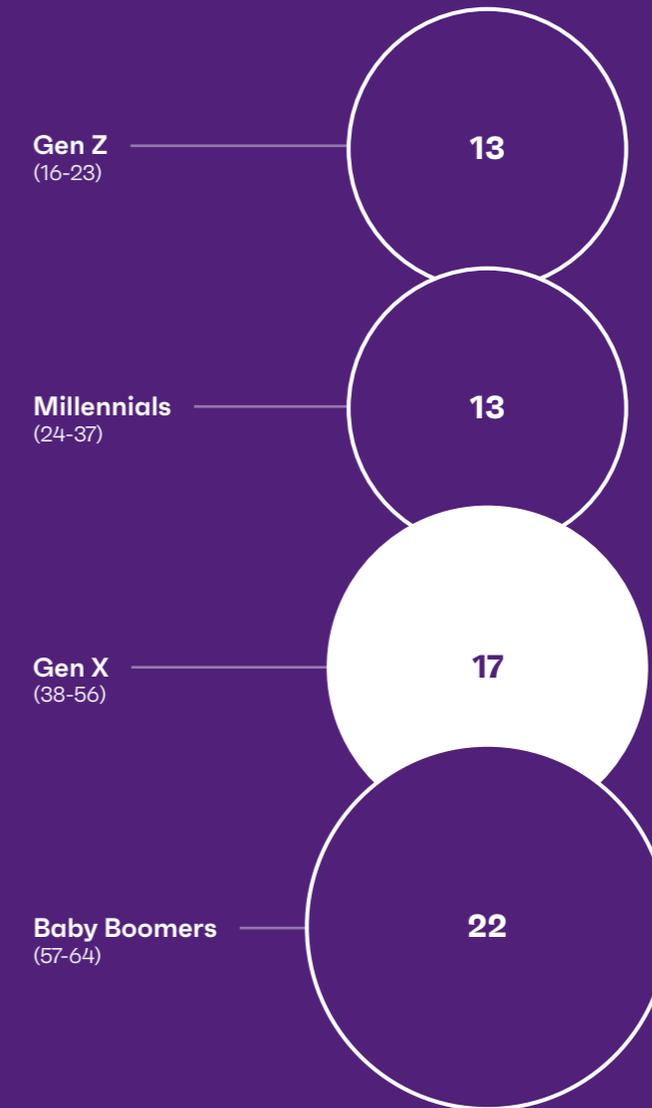
Gen X around the globe



GW I Core Q3 2020 59,597 Gen X internet users aged 38-56

Older consumers are more financially skeptical

% of each generation who expect their personal finances to get worse in the next 6 months



GWJ Core Q3 2020 179,201 internet users aged 16-64

Financial outlook

Financial pessimism increases with age. Gen X are 28% more likely than millennials and 13% more likely than Gen Z to say that the economy will get worse in the next 6 months. They're also significantly more likely to say the same of their personal finances.

This financial pessimism translates into other areas too. Gen X are more likely than Gen Z to describe themselves as price-conscious (46% vs 38%), to say they spend time looking for the best deals (49% vs 46%), or to use loyalty programs (39% vs 27%).

COVID-19 momentarily reversed this trend. Gen X are more likely to be of high income, own property, and be full-time workers; many of them

therefore had the financial security in place to weather the pandemic's storm so far. In comparison, younger consumers were much more likely to **lose their jobs or have incomes cut**. As a result, our July COVID-19 data found that just 35% of Gen X expected the pandemic to have a dramatic or big impact on their personal finances, which is actually slightly behind the general average of 37%.

That said, in times of normality, Gen X's above-average financial skepticism likely lies with the fact that they have more to lose. If 2021 brings signs of more certainty, younger consumers will likely revert back to their financially optimistic ways while Gen X's concerns are not going anywhere.

Gen X are 18% more likely than the average to seek out alternative medicines and therapies

Wellbeing concerns are up

In Q2, amid the darkest days of lockdown, the percentage of Gen X saying they or someone in their household has a mental health condition reached a new high (15%).

Despite the prominence of mental health **campaigns** targeting younger users, Gen X are on par with Gen Z for saying they're comfortable talking about their mental health – around 1 in 3 say this.

This reaches a high in countries like Ireland, South Africa, the UK, and New Zealand, where the majority of Gen X (>50%) say they're comfortable talking about their mental health.

Gen X are also now paying greater attention to their health and fitness. Between Q2 and Q3 2020, the proportion of Gen X falling into

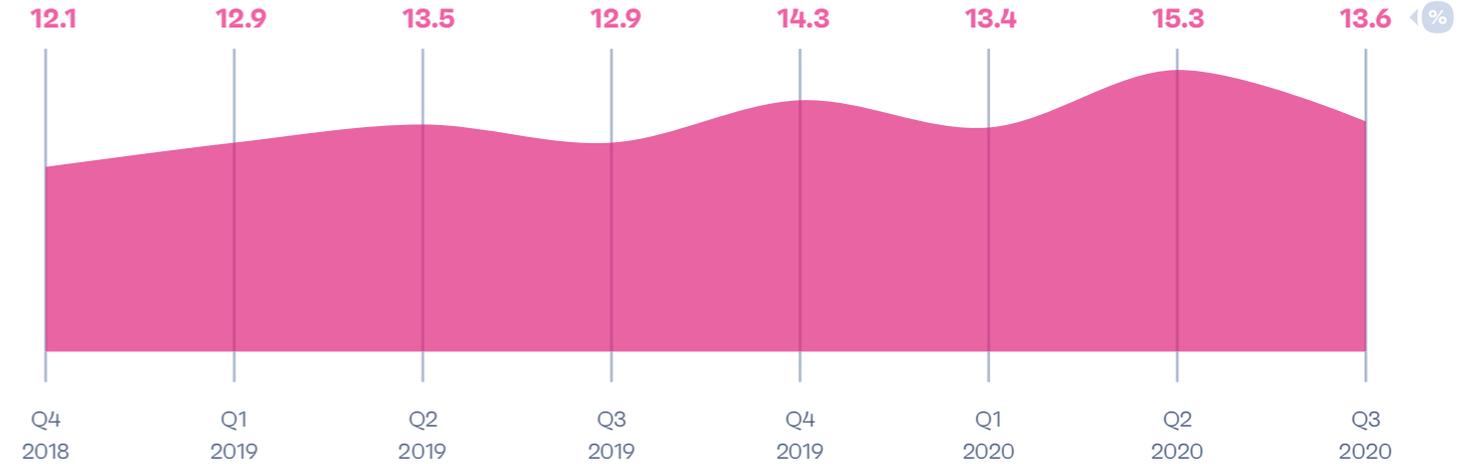
the health, fitness, and beauty enthusiasts **segment** jumped from 40% to 46%, and those interested in vegetarian food increased from 14% to 17%. While those visiting the gym dropped as lockdowns took hold; running has never been so popular – over half of Gen X say they now do this at least once a week.

Meanwhile, environmental concerns are up. Despite an upswing in Q2, when 51% of Gen X expected the environment to get better in the next 6 months, this dropped to 42% in Q3 as environmental optimism surrounding lockdowns **failed to materialize into significant change**. As a result they're more likely than other generations to be doing something about it – a third say they're interested in environmental issues and they're 11% more likely than the average to recycle.

The effect of lockdown on mental health

3

% of Gen X who say they or someone in their household has a mental health condition



Please note trended data accounts for year-on-year ageing of the sample

GWJ Core Q4 2018-Q3 2020 359,037 Gen X internet users born between 1964 and 1982

Top 5 countries



GWJ Core Q3 2020 42,096 Gen X internet users aged 38-56

02

Digital media habits

Digital media consumption is up and staying that way

As we saw in our “Coming of Age” **Connecting the dots** article, in terms of digital behavior, the “generation-defining” year of 2020 has been much more impactful for Gen X and boomers compared to their younger counterparts. As lockdown restrictions came into effect, spikes in digital activity followed. For younger groups it didn’t take long for these spikes to

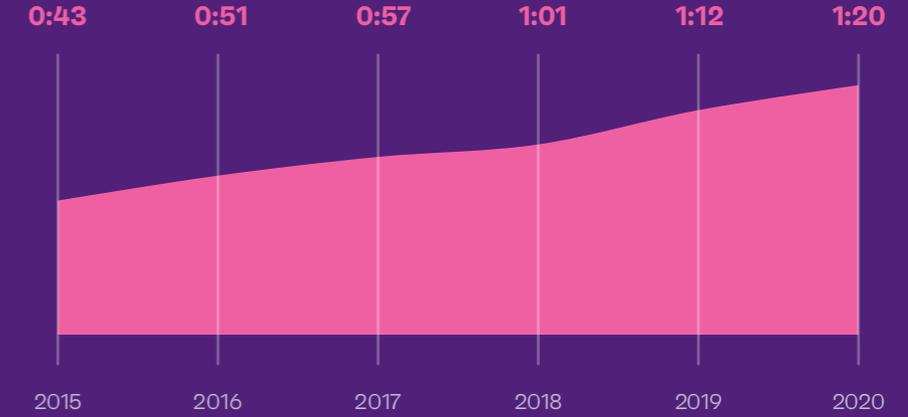
settle down, for older groups – and Gen X in particular – their engagement continued to flourish. Over the last five years, Gen X have been increasingly using the internet to consume media that many marketers associate with younger generations. This change has been particularly noticeable in North

America and Europe. Across countries in these regions, the proportion of Gen X watching subscription services weekly jumped up by five percentage points in Q2 2020 when lockdowns took hold. This coincided with an equal increase among Gen Z, however as lockdowns eased through Q3, Gen Z tastes for subscription TV appear to be returning to pre-pandemic

levels – while Gen X behaviors have remained stable. Compared to their younger counterparts, Gen X still spend less time watching online TV and over-index for traditional media consumption (such as radio and broadcast TV), however the takeaway here is that digital media’s fastest growth right now is coming from Gen X.

Gen X are streaming more and more TV

Average time spent by Gen X streaming TV each day in h:mm



GWII Core 2015-2020 (Averages of waves conducted between Q1 2015-Q3 2020)
576,288 Gen X internet users born between 1964 and 1982

They’ve maintained new tastes for subscription TV

% of Gen X/Gen Z in Western Europe and North America who watch subscription services at least weekly



GWII Core Q4 2019-Q3 2020
118,498 Gen X (born between 1964 and 1982) and 43,007 Gen Z (born between 1997 and 2004) internet users in Western Europe and North America*

*Countries include: Austria, Belgium, Canada, Denmark, France, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden, Switzerland, UK, & U.S.A.

Gen X TV streaming preferences around the globe

Since 2018, the proportion of Gen X purchasing movies/TV subscriptions online has steadily increased. And today, at 47%, Latin America is home to the highest proportion of Gen X TV/movie subscription buyers. At 27%, it's far less popular in Europe, however this has increased from just 16% in 2018.

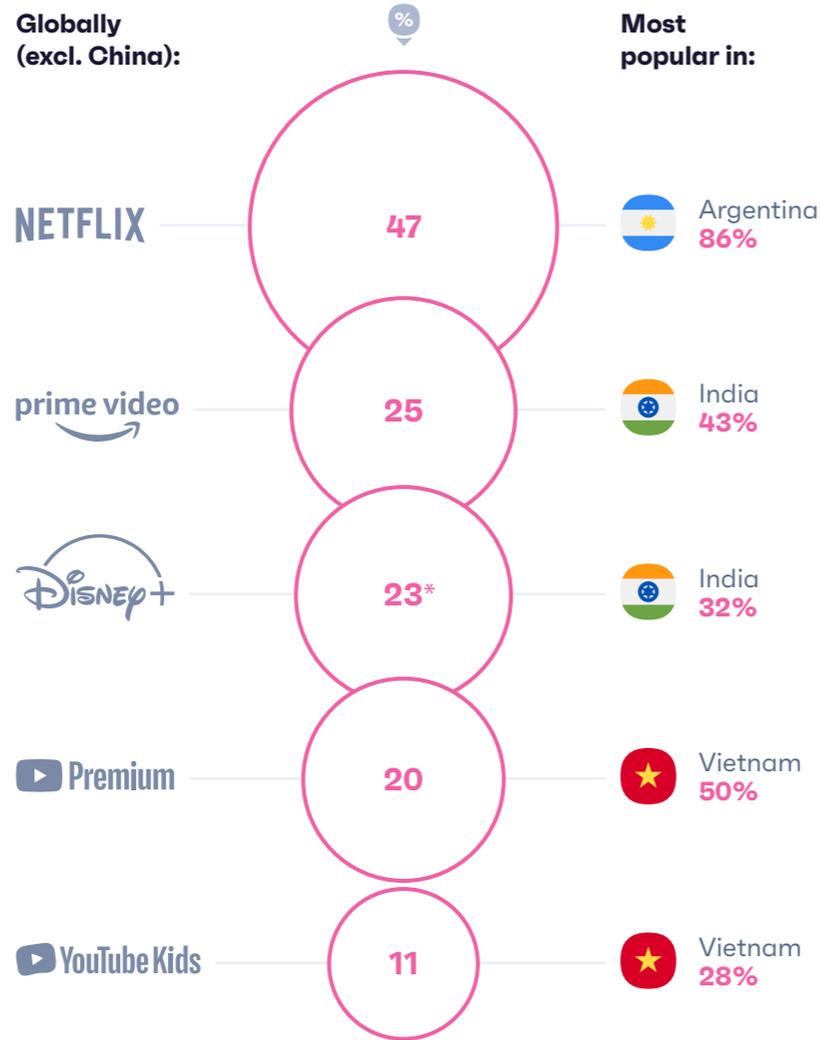
Globally, among Gen X the biggest providers are Netflix, Amazon, and YouTube. However, some markets see greater demand for domestic suppliers. For instance, in the UK Netflix is as popular as BBC iPlayer (55%) among Gen X. Compared to winning over Gen Z or millennials, the major global subscription services are set to find that competition with local providers will be far fiercer when it comes to Gen X.

*Disney+ is not fielded in all 46 countries, this represents the % of Gen X in India, U.S.A., Ireland, Australia, Canada, UK, Germany, New Zealand, Italy, France, Netherlands, Spain, and Switzerland

Top 5 ways to stream TV

6

% of Gen X who've watched TV on the following services in the last month



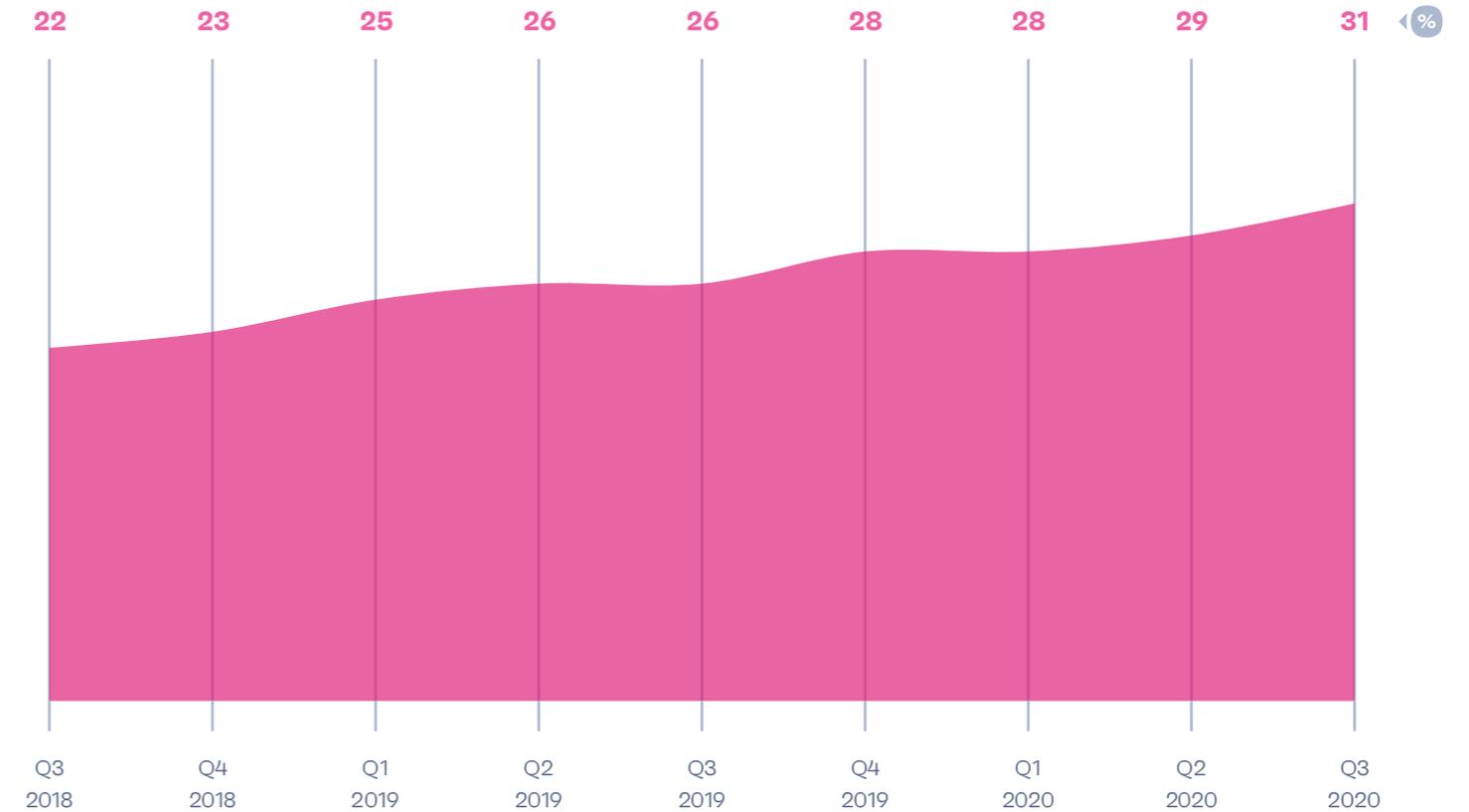
GWI Core Q3 2020

36,837 Gen X internet users outside China, aged 38-56

Streaming TV: Gen X are ready to pay

7

% of Gen X who've purchased a movie/TV streaming service in the last month



GWI Core Q3 2018-Q3 2020

478,706 Gen X internet users born between 1964 and 1982

Disney+ (not just for kids)

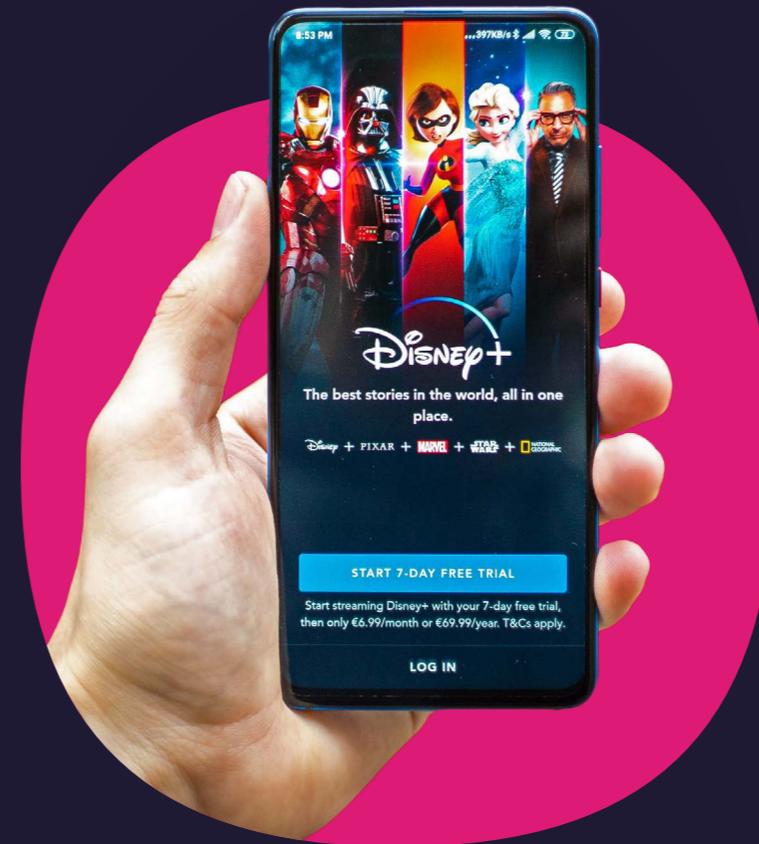
Disney+ has been one of the most successful newcomers to the streaming wars over the last year. While one might consider its content as more in tune with younger audiences, with a back catalog of up to 100 years, many of its older films have won over Gen X's nostalgia.

Whether that's **Willow or Who Framed Roger Rabbit**, unlike other streaming giants, Disney provides an opportunity for Gen X to escape lockdowns and remind themselves (and show their children) of simpler times. Moreover, Gen X are considerably more

likely to be fans of Disney-owned Star Wars or Indiana Jones which Disney has **distribution rights** to for future movies. In an increasingly concentrated market, this niche may be crucial to winning over this audience.

Gen X are 18% more likely to describe themselves as traditional, so provoking nostalgia can be an effective tool in the right contexts to unlock this audience's spending power. Disney+ even revived a **Mouseketeers special** from the 1970s with all the commercials that aired during the original 1977 broadcast.

Between Q1 and Q3 2020 in the U.S., Disney+ Gen X users increased from 24% to 31%



Social media

Top reasons for using social media

It's not just online TV that's grabbing the attention of Gen X. They're spending more time on social media now than ever before – and how they're using it is evolving.

In 2017, the top reason for using social platforms was to stay in touch with what their friends were doing, followed by staying up-to-date with news and current events. Jump forward to today and these two use cases have

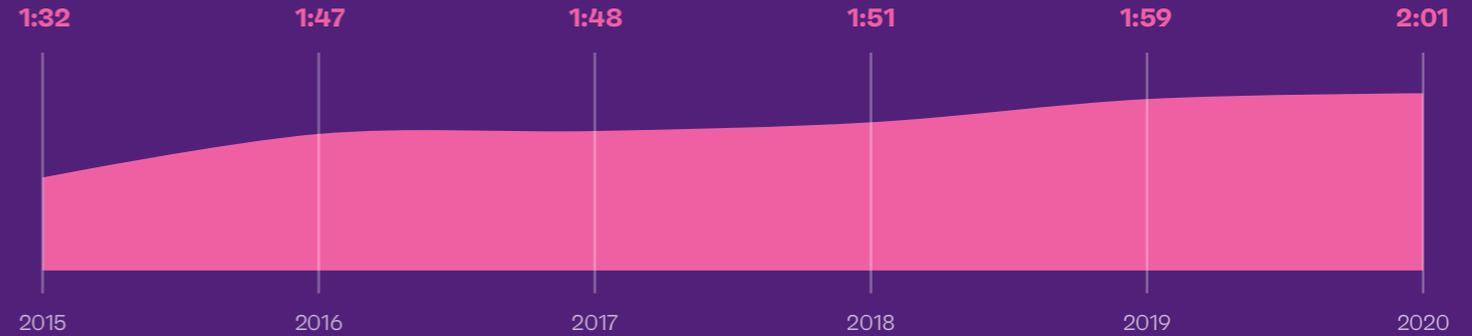
swapped positions, with the latter increasingly becoming more important. Less than a third now say that they use social media to stay in touch with what their friends are doing – this stood at 40% in 2017.

A quarter of Gen X use social media to follow news/media organizations, moreover compared to Q2 2020, Gen X are 12% more likely to use social media to follow celebrity

news in Q3. Brands also have an important role to play in Gen X's social media experience – 28% say they follow brands they like and 19% say they follow brands they're thinking of buying something from. While much has been made of social commerce's potential, this is often associated with younger consumers. However, Gen X are now bringing their spending power to Gen Z-first platforms.

Time spent on social media increases

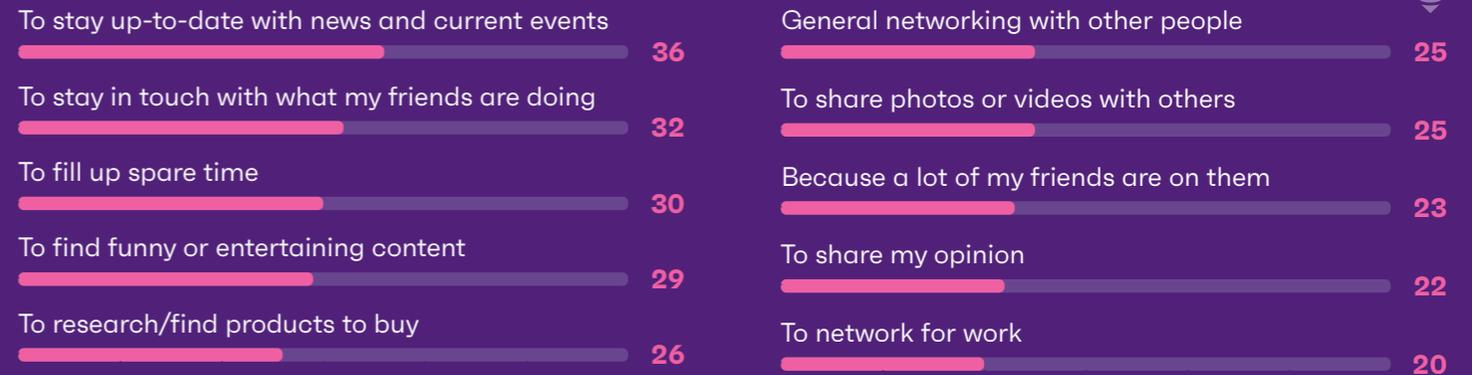
Average time spent by Gen X on social media each day in h:mm



GW I Core 2015-2020 (Averages of waves conducted between Q1 2015-Q3 2020)
576,288 Gen X internet users born between 1964 and 1982

Top reasons for using social media

% of Gen X who use social media for the following reasons



GW I Core Q3 2020 42,096 Gen X internet users

A third of Gen X have more than 7 social media accounts

For Gen X social media now goes beyond Facebook

When it comes to social media, Gen X are prominent users of Facebook and YouTube. However, while that may have been the case a few years back, the story is not so black and white today. Other social media platforms are bridging the gap – and quickly.

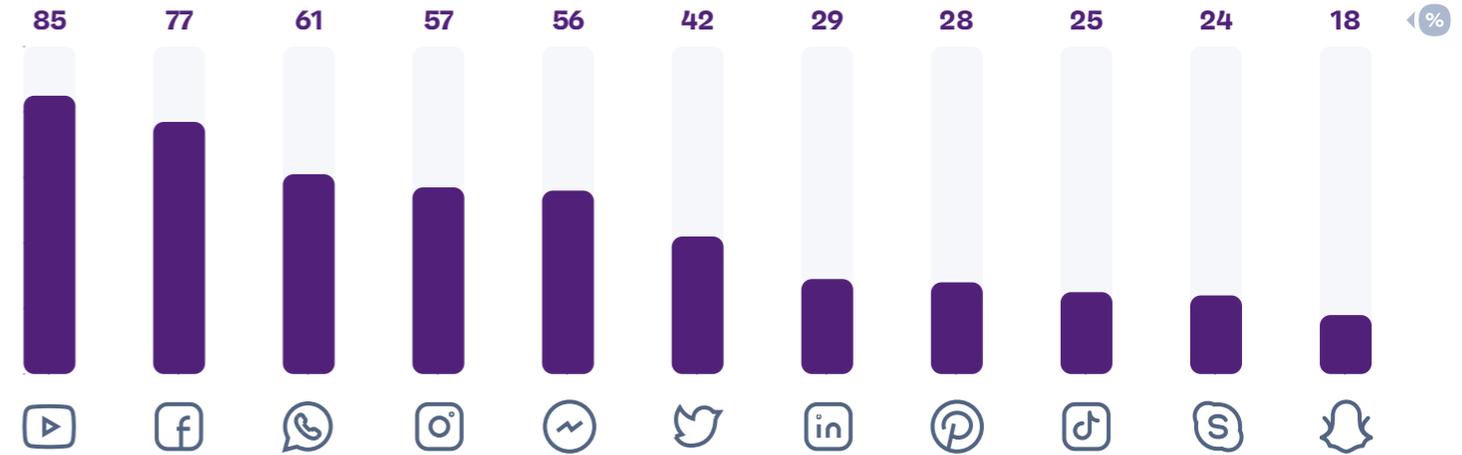
Back in 2017, 77% of Gen X outside of China used Facebook, a number that hasn't changed by Q3 2020. However, in the same time frame monthly usage of WhatsApp increased from 51% to 61% and Instagram jumped up from 38% to 57%. While for Gen X social media used to be synonymous with

solely having a Facebook account, their usage has become increasingly broad.

Outside of China, 25% of Gen X used TikTok in the last month in Q3 2020, up from 14% in Q3 2019. Their increased appetite for TikTok coincides with their changing social media needs: 3 in 10 Gen X use social media to fill up spare time, while a similar proportion use it to find funny/entertaining content. While Facebook may have won over Gen X first, their attention is shifting to other platforms as their demands for social media change.

Top social media platforms

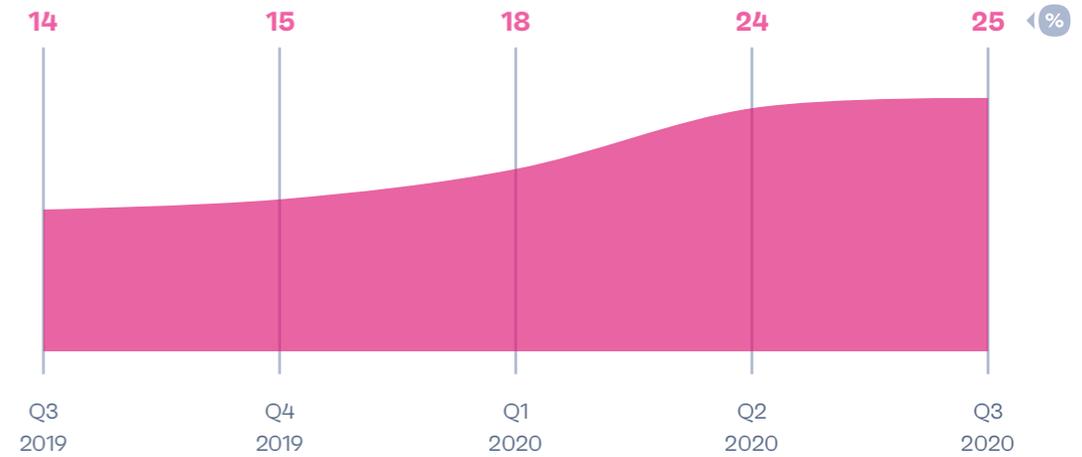
% of Gen X outside of China who've visited the following platforms in the last month



GWJ Core Q3 2020 52,515 Gen X internet users outside of China, aged 38-56

The rise of TikTok

% of Gen X outside of China who've used TikTok in the last month



GWJ Core Q3 2019-Q3 2020 254,093 Gen X internet users outside of China, born between 1964 and 1982

Trend in action

Apple Music uses TikTok to capture Gen X

As a consumer it can be difficult to interpret the intention of a marketing message, however when it comes to Apple Music it's clear that their TikTok account isn't just a play for Gen Z. Apple Music's TikTok content is the exact same tone you would see in its distinctive ads running on TV, in print, and other digital media.

As **INC.** reports "the bulk of what you can watch on the brand's

TikTok account are quirky interviews of trending music artists and polished lyric videos – a far cry from the comedy-centric and 'memeable' videos that made the video app so popular with Gen Z in the first place."

Apple stays true to its core Gen X customers who are increasingly using TikTok and have the added bonus of having a higher spending power.

25% of Gen X use TikTok, rising to 41% among those who also have Apple Music



Device ownership

The shift to mobile-first

In 2015, Gen X spent on average of 1 hour and 52 minutes a day on mobile – today this stands at three hours.

Of the 36 online activities we track, Gen X are now more likely to perform all of them on their mobiles rather than on desktop. Some, such as checking the weather online, have been mobile-first for many years; while others, which are commonly closer associated with desktop usage such as using a webmail service or online encyclopedia, have become mobile-first much more recently.

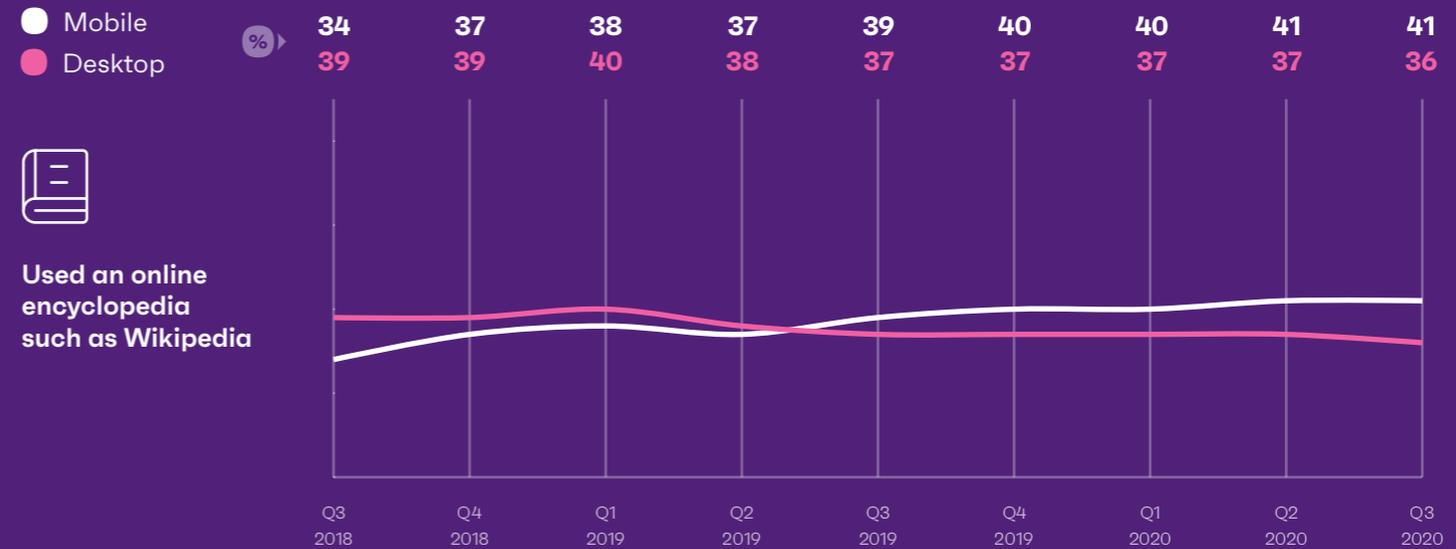
In comparison, baby boomers are more likely to perform several of our tracked online activities on desktop rather than mobile. Boomers are now the outliers. Gen X – with their mobile-first habits – are much closer in line with their younger counterparts.

For instance in the last month, 48% of baby boomers have purchased a product online via desktop, while 35% have done this on mobile. On the other hand, just 39% of Gen X do this on desktop, whereas 52% do it on mobile.

26% of Gen X have sold a product online via mobile in the last month, just 14% have done this on desktop

Online activities shift to mobile-first

% of Gen X who say they've done the following in the last month



26% of Gen X have five or more devices

Smart products are up, alongside health tech demands

As desktop-first online activities fall across the board for Gen X, PC/laptop ownership has plummeted – falling from 89% in 2015 to just 66% in 2020. Meanwhile, we’ve seen a recent explosion in ownership of smart products, many of which saw a spike in Q3 2020 – a trend likely instigated by the pandemic-induced lockdown. For smart TVs and home products this appeal lies with entertainment and practicality. What’s of specific interest, however, is that smart healthcare technologies are set to boom among the ageing – yet tech savvy – Gen X.

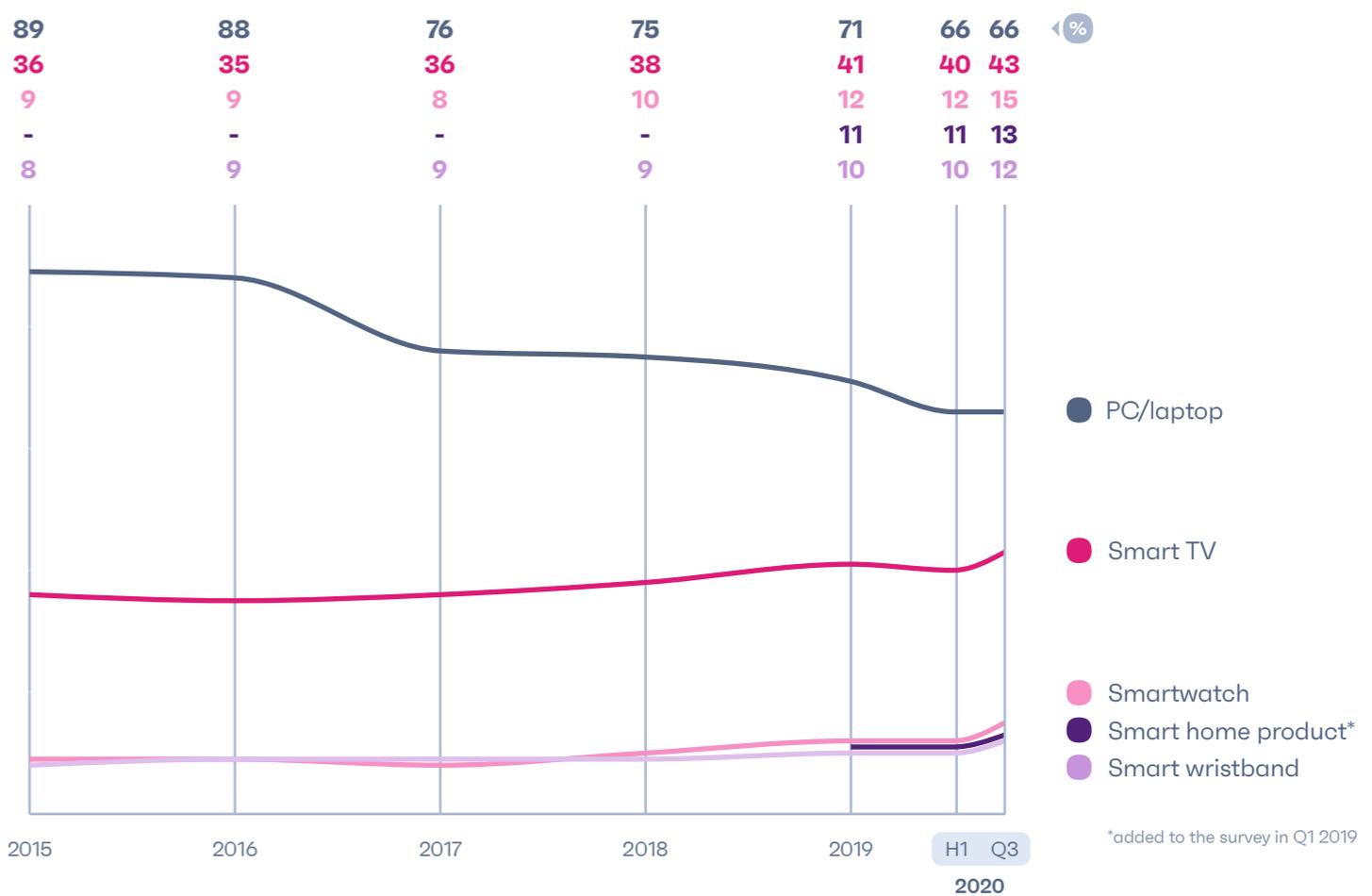
A high proportion of Gen X say they trust new tech to improve their health (31%) or that researching health issues is an

important reason for using the internet (39%). While their older counterparts are much less likely to be confident using technology, Gen X is emerging as health-care tech’s key market.

1 in 4 Gen X are comfortable with apps tracking their activity. And while this may be primarily for walking and sleeping right now, their interest in the tech is obvious and this has grown during the pandemic. Smart tech devices are well placed to accommodate these new-found habits. Among Gen X who own a smart home product, just shy of half say exercise and wellbeing became more important during lockdown and an additional 19% say smart products could help them achieve this.

PC ownership falls, smart products tick upward

% of Gen X who own the following devices



GWJ Core Q1 2015-Q3 2020 859,237 Gen X internet users born between 1964 and 1982 *added to the survey in Q1 2019

COVID-19 has affected how Gen X use their devices

As mobile usage continues to rise, Gen X's digital behaviors are evolving. Much of this has been driven by the pandemic and this isn't just down to health concerns. For instance, as lockdowns split up loved ones, Gen X are making more video calls, alongside using mobile payment services and QR codes more as stores reopen in a COVID-secure environment.

As we saw with the increased ownership of smart TVs, boredom during lockdown has led many Gen X to reevaluate their entertainment demands of their devices. This helps explain their increased time on mobile, a device which 52% now use to watch TV and 68% use to play games each month. The fifth wave

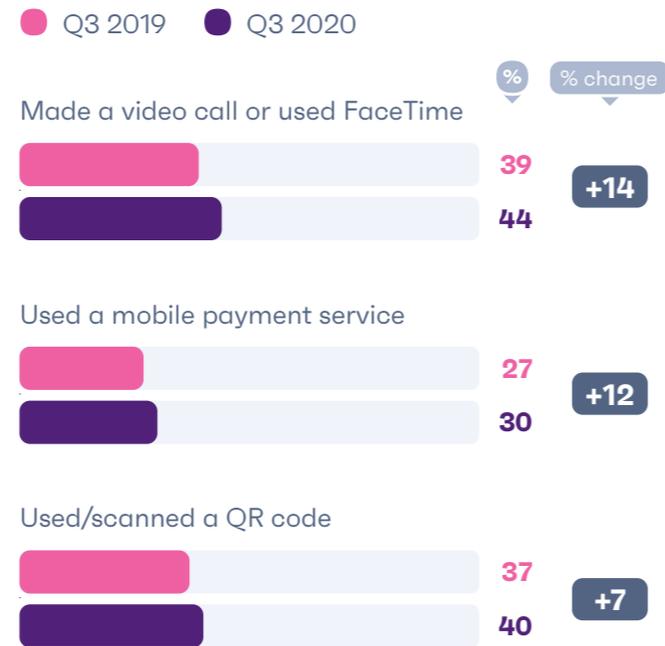
of our COVID-19 research from July revealed that while 40% of consumers have been watching more broadcast TV because of the pandemic, a greater proportion (43%) said they'd been watching more videos on YouTube – a typically mobile-first media.

It's also important to note that for Gen X mobile usage has now permeated into other leisure activities, specifically second screening. Since 2018, those saying they use their mobile phone while watching TV has jumped from 68% to 79%. The top activity they're performing is messaging friends – 50% do this. So increased time spent watching TV through lockdown likely coincided with simultaneous increases in mobile usage.

COVID-19 has pushed Gen X to use mobile for more activities

13

% of Gen X who have done the following in the last month on mobile (sorted by % change)



GWI Core Q3 2019 & Q3 2020
51,737 (Q3 2019) & 59,597 (Q3 2020) Gen X internet users born between 1964 and 1982



Buying behaviors

Growth of online shopping

Using data from wave 5 of our COVID-19 research in July, we found that half of Gen X expect to shop online more frequently once the outbreak is over. Not only do Gen X have a high spending power, but many are also parents – it’s therefore crucial that e-commerce brands of all types consider targeting this audience.

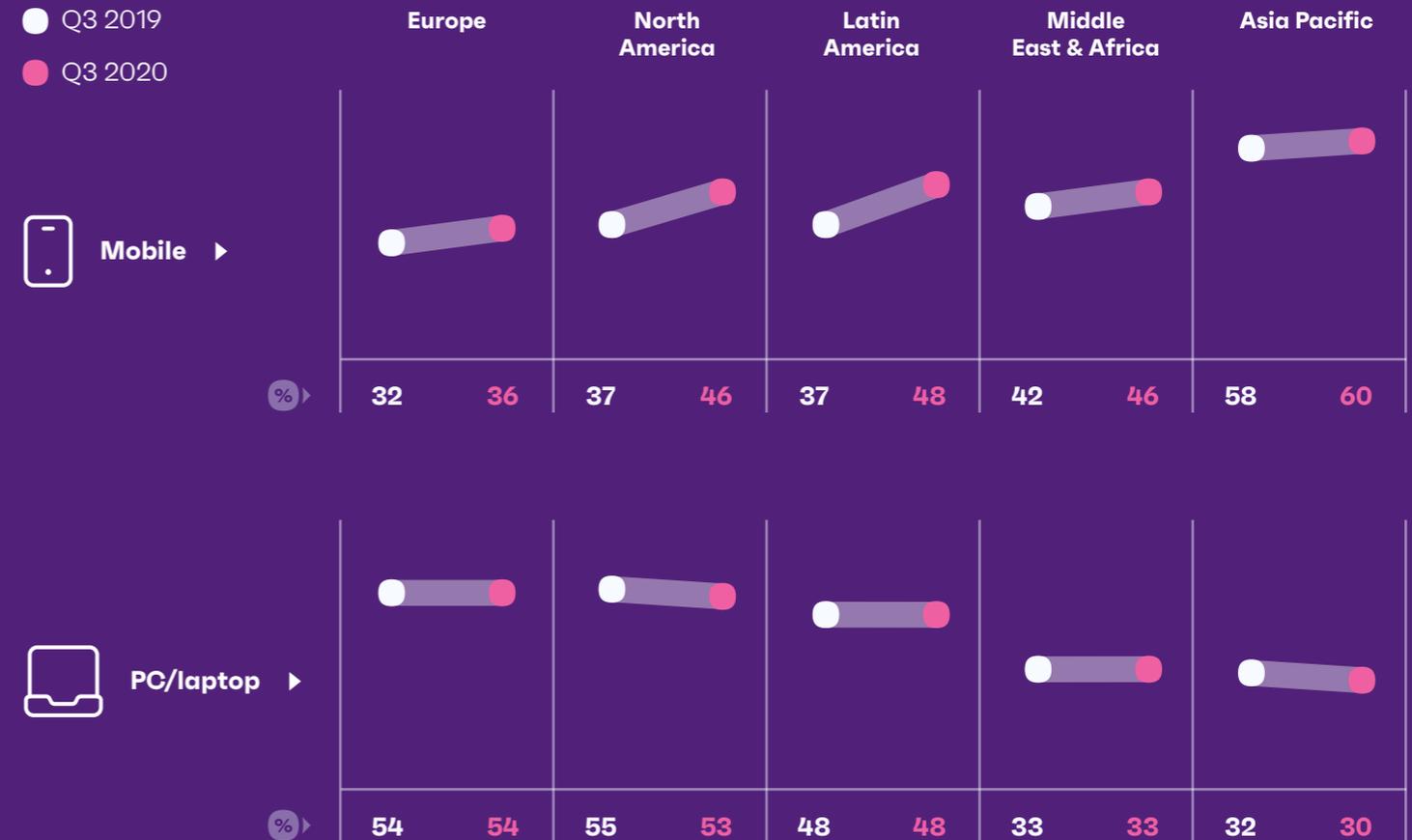
Christmas further helped reinforce these newfound online shopping preferences among Gen X. With hygiene concerns putting consumers off shopping in-store (even as many began to reopen), Gen X turned instead to online shopping. Using custom research in the U.S./UK from October, we found that 53% of Gen X expected brands to increase their online shopping capabilities this Christmas – compared to the average of 50%.

Hygiene concerns aside, Gen X have now recognized the practicalities associated with online shopping. In the U.S./UK, 53% said convenience was a strong motivation for them to buy Christmas gifts online this year – compared to 37% of Gen Zs.

While globally Gen X is now more likely to buy a product online via mobile than desktop, there are disparities on a regional basis. For instance, Europe and North America are still primarily desktop-first. That said, between Q3 2019 and Q3 2020 mobile shopping in Europe increased among Gen X from 32% to 36% while in North America it rocketed from 37% to 46%; putting it on par with Latin America and the Middle East. All in all, APAC continues to be the flagbearer for Gen X mobile shoppers, but everywhere else is catching up.

Purchases via mobile see YOY growth, PCs stall

% of Gen X who've purchased a product online in the last month via the following devices



GWJ Core Q3 2019 & Q3 2020 51,737 (Q3 2019) & 59,597 (Q3 2020) Gen X internet users aged 38-56

Online purchases: what categories are on the rise?

% of Gen X who have purchased the following online in the last month



What are they buying?

COVID-19 accelerated many trends in ecommerce and online grocery purchases were subject to a particularly large surge in demand. Since 2018 around a third of consumers have purchased groceries online, a figure that didn't deviate significantly until Q3 2020 – when pandemic-induced shopping trends gained significant momentum – jumping up to 37%.

Certain markets have seen more prolonged growth though. In Latin America, for example, online grocery shopping almost doubled from 15% in 2018 to 29% in Q3 last year. At 45% APAC is home to the highest percentage of Gen X who are online grocery shoppers.

Gen X's demand for online grocery shopping has coincided with evolving expectations of Gen X women in households. For instance, while women remain the main grocery shoppers in most households, between Q1 and Q3 last year men became 4% more likely to say they took care of this responsibility. While this is a small increase, the trend is more pronounced in specific APAC countries like Thailand, Taiwan, Vietnam, and Indonesia.

But online shopping goes beyond just groceries and Gen X are now turning to the internet to buy a plethora of products. To overcome lost revenue due to closed physical stores, retailers

turned to ecommerce. However, there were worries that – groceries aside – older consumers wouldn't be so willing to shop online for traditionally "try on" products that have increasingly become less popular among this audience when shopping online in recent years.

It's therefore encouraging to see online purchases of shoes and clothing among Gen X tick upward. It's not only a sign that online shopping now has a broad and entrenched appeal among this generation, but it sets a benchmark for other products to expect increased online demand among Gen X going forward.

GWJ Core Q3 2018-Q3 2020 392,782 Gen X internet users born between 1964 and 1982

How can brands grab their attention?

Younger consumers, and Gen Z in particular, use the internet and social media for many more reasons than Gen X – they’re also much more likely to be distracted by social media when watching TV. For this reason, whether it’s an ad on TV or on the internet, younger consumers are often busy doing something else so it can be harder – and therefore more costly – to win their attention. In contrast, Gen X are far more likely to be paying attention.

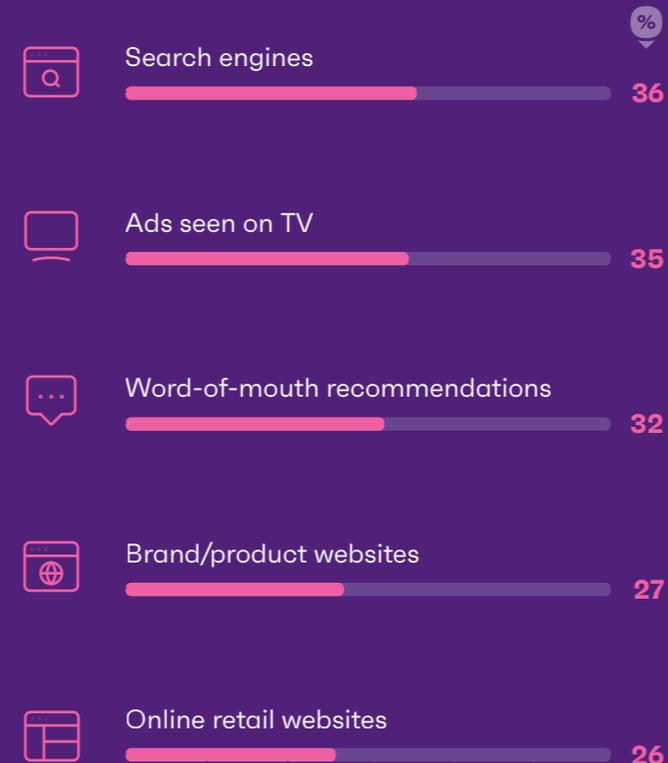
In fact, younger consumers are more likely to try to avoid advertising altogether or use online privacy tools such as ad blockers or private browsers. And this isn’t just because they use the internet more. Among consumers who use their mobiles or PC/laptops for more than three hours a day,

this generational trend persists. For advertisers it can be much cheaper to get digital advertisements in front of Gen X – this is especially true right now when marketing budgets have been cut.

What’s crucial is how brands can maintain their attention. Compared to other generations, Gen X pay more attention to a brand’s reputation: they’re far more likely to stay watching if they know and respect the brand. Ultimately, they trust other people’s opinions. A third of Gen X rely on word-of-mouth recommendations when discovering new brands and 4 in 10 will turn to consumer reviews for research. Brands stand to make serious use of this given winning over one consumer means they’re able to access their immediate circle as well.

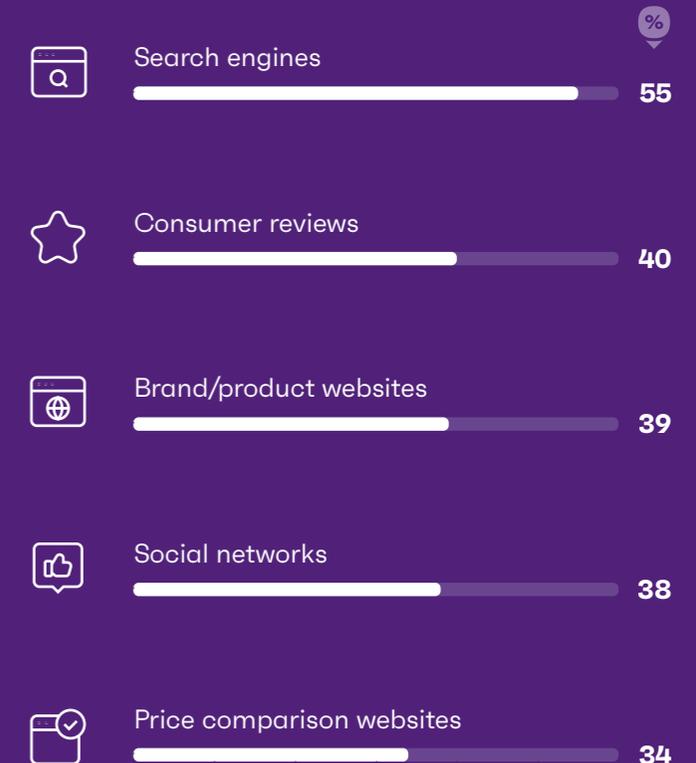
Top 5 brand discovery channels

% of Gen X who use the following sources to discover new brands



Top 5 online product research channels

% of Gen X who use the following sources to research new brands



How can brands persuade them to make a purchase?

For Gen X, when shopping online the major drivers to purchase fall under two categories: convenience and cost-savings.

As we've seen with the growth of online shopping, convenience was key last Christmas for consumers in the U.S./UK, and our global data is a promising validation of this insight. Free delivery, easy returns, and a simple checkout process are highly important drivers among this audience. Gen X are willing to part ways with their cash online but if brands don't streamline and simplify the process they'll lose their attention very quickly.

High quality products (49%) and rewards (41%) come up top when it comes to brand advocacy. And our recent Zeitgeist research found that COVID-19 has accelerated their importance: half

of Gen X say the pandemic has made them want brands to focus more on both quality and value.

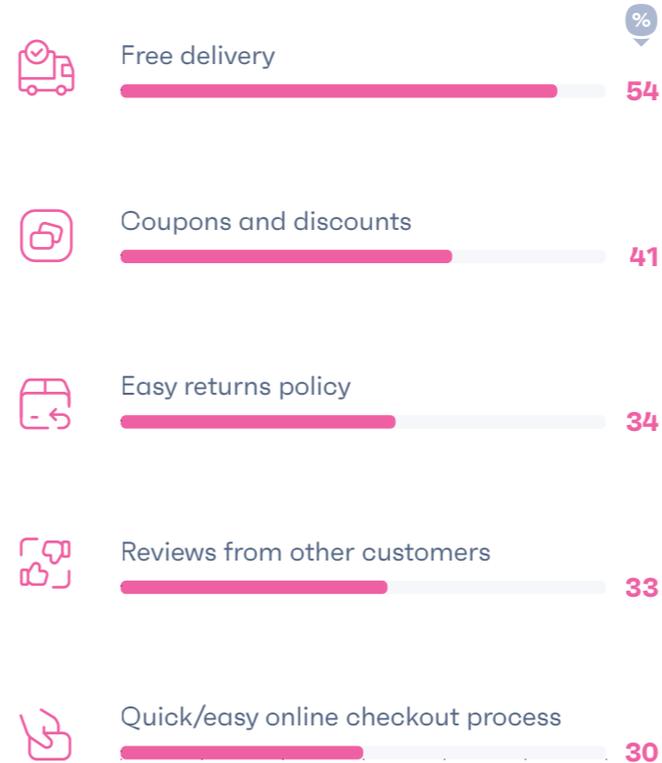
At first this may seem contradictory because quality doesn't come cheap. Discounts can undermine perceptions of quality, and many companies aren't currently in a position to slim down margins. But in the right context, loyalty and referral programs can be effective ways in appeasing Gen X's buying needs. Done correctly, these promotional strategies can tap into their reliance on peer recommendations while upholding their need for quality, without undermining a brand's pricing strategy.

Gen X are also more likely than Gen Z to want brands to focus more on supporting people during COVID-19 – it's no wonder then that 43% of Gen X globally want brands to be socially responsible.

Top 5 drivers to purchase online

17

% of Gen X who say the following would drive them to make a purchase online



GWII Core Q3 2020
42,096 Gen X internet users aged 38-56

Top 5 areas brands should focus on since COVID-19

18

% of Gen X in 7 countries who want brands to focus on the following more since the pandemic



GWII Zeitgeist September 2020
3,589 Gen X internet users aged 38-56 in 7 countries (Brazil, China, France, Germany, India, UK, & U.S.A.)

Appendix

Survey questions used per chart

- 1 Where do you live? | How old are you? | What best describes your marital status? | How many children do you have? | Where is your household located? | What is your current working status? | What is your yearly household income before tax or any other deductions?
- 2 In the next 6 months, how do you think the following will change? (Your personal finances: get worse)
- 3 Do you personally, or does anyone in your household, currently have any of the following conditions? (Mental health conditions)
- 4 On an average day, how long do you spend watching online television/streaming?
- 5 How often do you watch subscription services such as Netflix? (At least weekly)
- 6 In the last month, which of these services have you used to watch/download TV shows, films or videos?
- 7 In the last month, which of these have you paid for? (Movie or TV streaming service)
- 8 On an average day, how long do you spend on social media?
- 9 What are your main reasons for using social media?
- 10 Which of the following sites/applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet?
- 11 In the past month, which of the following things have you done on the internet via any device?
- 12 Which of the following devices do you own?
- 13 Which of these have you done on your mobile in the last month?
- 14 In the past month, which of the following things have you done on the internet via any device? (Purchased a product online)
- 15 In the last month, which of these items did you purchase online?
- 16 How do you typically find out about new brands and products? | Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?
- 17 When shopping online, which of these features would most increase your likelihood of buying a product?
- 18 Since COVID-19, which of these do you want to see brands/companies putting more focus on?



Notes on methodology

Introduction

All figures in this report are drawn from GWI’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. Our custom data considers where the pandemic has advanced or undercut key trends.

Our research

Each year, GWI 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 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.

Sample size by market

This report draws insights from GWI’s Q3 2020 wave of research across 46 countries, with a global sample of 179,201 respondents.

● of which are Gen X

Argentina	1,501	473	Morocco	936	114
Australia	4,002	1,609	Netherlands	1,265	478
Austria	1,266	521	New Zealand	1,264	465
Belgium	1,265	503	Nigeria	1,016	122
Brazil	5,536	1,566	Philippines	3,084	683
Canada	4,778	1,914	Poland	2,033	655
China	24,235	7,082	Portugal	1,242	508
Colombia	2,541	742	Romania	1,281	534
Denmark	1,504	610	Russia	3,600	1,421
Egypt	1,757	436	Saudi Arabia	1,492	422
France	5,067	2,107	Singapore	2,777	1,100
Germany	5,058	2,135	South Africa	1,522	391
Ghana	907	52	South Korea	1,269	579
Hong Kong	1,793	712	Spain	5,042	2,363
India	13,881	2,368	Sweden	2,626	1,044
Indonesia	5,034	1,081	Switzerland	1,527	641
Ireland	1,256	481	Taiwan	2,269	904
Israel	1,558	542	Thailand	3,785	1,096
Italy	5,075	2,366	Turkey	2,008	531
Japan	3,294	1,532	UAE	1,778	602
Kenya	1,022	149	UK	10,107	4,096
Malaysia	2,784	802	U.S.A.	25,371	9,457
Mexico	4,268	1,092	Vietnam	2,525	516

Mobile survey respondents

From Q1 2017 on, GWI 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: GWI versus ITU figures

As GWI's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced to the right) 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 GWI's markets

GWI'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.

Internet penetration rates (GWI's Forecasts for 2020 based on 2018 ITU data)

Argentina	80	Morocco	67
Australia	89	Netherlands	95
Austria	89	New Zealand	94
Belgium	90	Nigeria	50
Brazil	75	Philippines	67
Canada	94	Poland	80
China	62	Portugal	79
Colombia	68	Romania	76
Denmark	98	Russia	85
Egypt	54	Saudi Arabia	90
France	86	Singapore	90
Germany	92	South Africa	64
Ghana	50	South Korea	97
Hong Kong	92	Spain	90
India	45	Sweden	96
Indonesia	42	Switzerland	96
Ireland	87	Taiwan	90
Israel	77	Thailand	59
Italy	88	Turkey	76
Japan	93	UAE	98
Kenya	40	UK	96
Malaysia	84	U.S.A.	90
Mexico	71	Vietnam	70

This table provides GWI forecasts on internet penetration (defined as the number of internet users per 100 people) in 2020. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GWI conducts online research in.

Want more answers?

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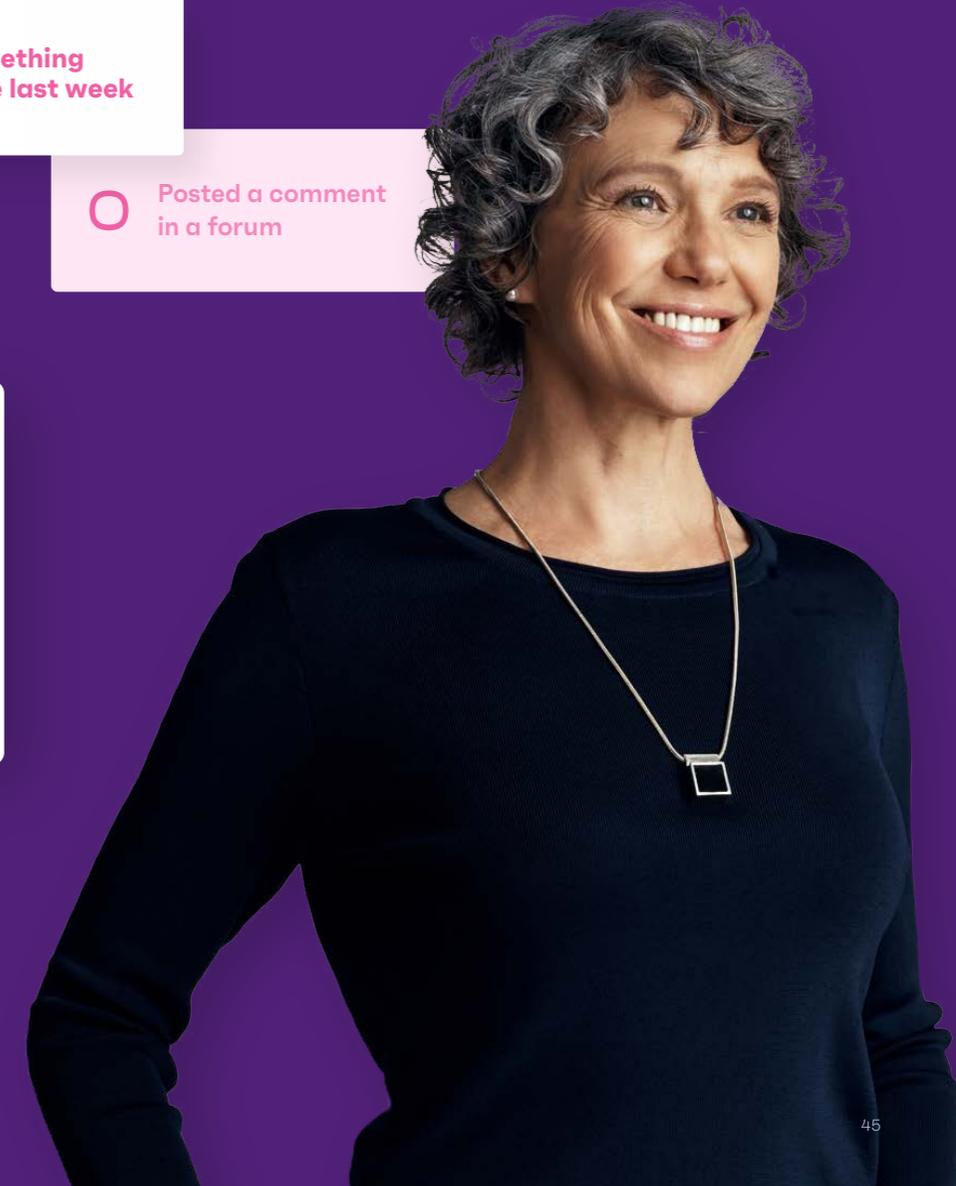


Bought something online in the last week

Posted a comment in a forum

1/4

buyers say blogs are very influential when researching a new product



GWI.

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