



Affluent consumers

Examining the lifestyles, attitudes, digital and purchase behaviors of affluent consumers

AUDIENCE REPORT 2020

globalwebindex.com



What's inside

- 03** Introduction
- 04** Key insights
- 05** Understanding affluent consumers
- 08** Attitudes & lifestyle
- 10** Tech behaviors
- 15** Media consumption
- 20** The purchase journey
- 27** Notes on methodology
- 29** More from GlobalWebIndex



Introduction

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

This report focuses on:

- 01 Understanding affluent consumers** – what is this audience’s demographic profile?
- 02 Attitudes and lifestyle** – what attitudes, behaviors, and interests define this group?
- 03 Tech behaviors** – how do they feel about technology? And what kind of devices are they using?
- 04 Media consumption** – where do affluent consumers spend most of their time online? What social media platforms do they use and how do they use them?
- 05 The purchase journey** – how are affluent consumers shopping online? How does this audience discover and interact with brands online? What drives them to purchase and promote a brand?

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.

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.

DEFINING AFFLUENT CONSUMERS

GlobalWebIndex’s Social Grading Segmentation ranks respondents based on their answers to a number of questions relating to their lifestyles, professional lives, and personal circumstances. Respondents in each country are divided into five quintiles – with the 1st quintile containing those of the highest social grade. Affluent consumers are defined as the 1st quintile in each market. This means that affluent consumers scored the most highly across characteristics relating to wealth, educational achievement, working status, vacations, device ownership, and car ownership. For more information on GWI’s Social Grading Segmentation, please download this [document](#).

This definition rendered a sample of 23,261 respondents from 42 countries. To re-create this audience, clients can access our [Audience Builder](#) on the platform.

Key Insights

01

Affluent consumers are highly ambitious, career-driven, and value status.

This audience is 1.2x as likely as the average to say they're career oriented and that money is the best measure of success. They're highly motivated to succeed and place significant value on status and exclusivity. Affluent consumers are willing to pay more for products, and are more likely to turn to premium brands that boost their status and image.

02

They're early adopters of new, smart technology - but also show signs of tech frustration.

Affluent consumers are key backers of smart technology. They're 89% more likely than average to own a smartwatch and have also taken a strong liking to smart home products. While they're keen to embrace the latest technology, we're also seeing signs of frustration with technology emerge.

03

They're big users of traditional and digital forms of entertainment.

This group has embraced all digital channels, while still remaining active users of traditional media. Overall, they spend longer on all forms of media compared to the average internet user. They're avid users of both online and linear TV, spending roughly 3 hours and 40 minutes across both per day.

04

Social media plays a key role in the purchase journey - especially for product research in emerging regions.

Considering this group spends most of their time per day on social media, it makes sense to see that social media plays a key role in their purchase journey. In particular, social media is an increasingly important product research tool for younger affluent consumers in emerging markets like Latin America and the Middle East and Africa.

05

Personal relationships and involvement are key to engaging this group and driving brand loyalty.

This group is highly brand-oriented. Close to 3 in 10 will promote a brand online if they're directly involved or have a personal, one-to-one relationship with a brand. It's critical that brands actively involve this group and take their opinions on board to make them feel valued.

01

Affluent consumers

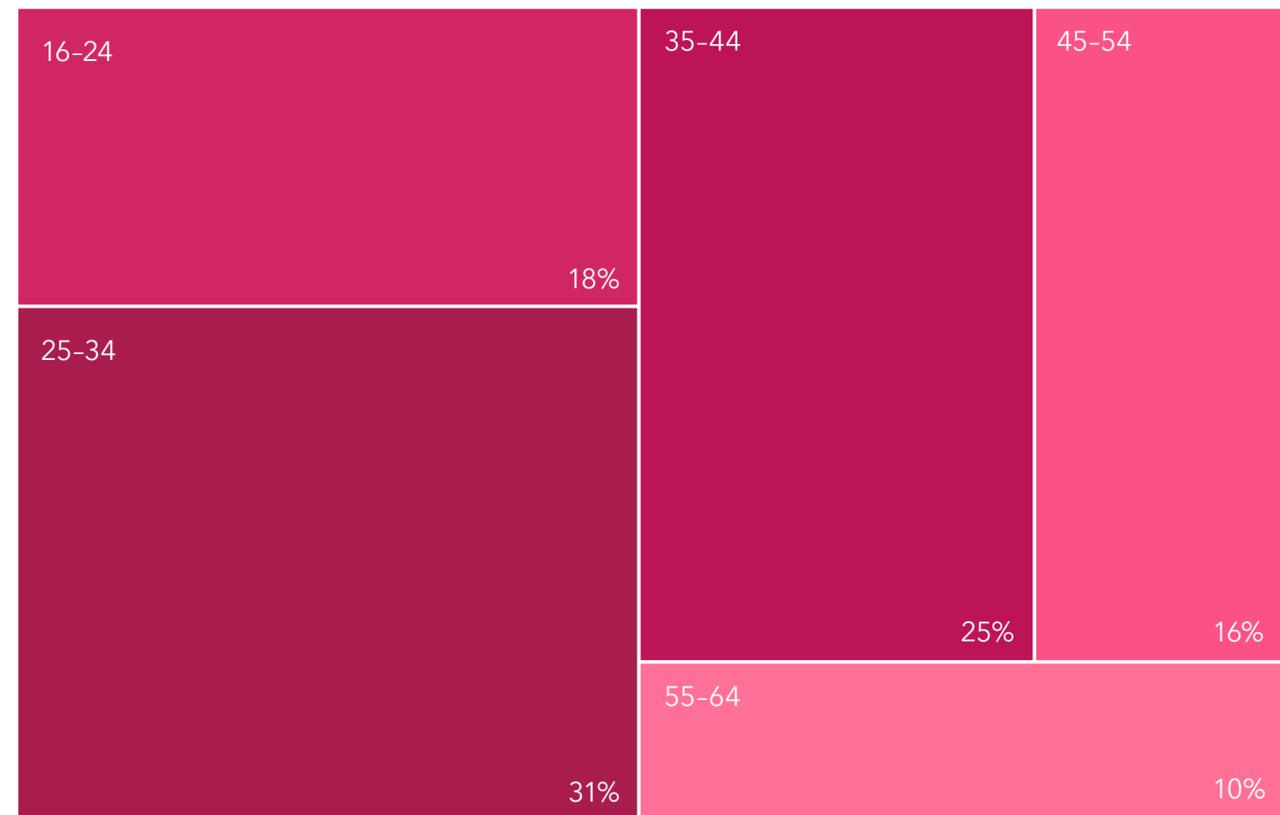
Understanding affluent consumers

Who are affluent consumers?

GENDER



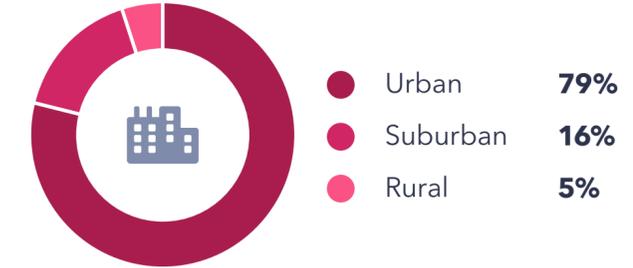
AGE



EMPLOYMENT STATUS



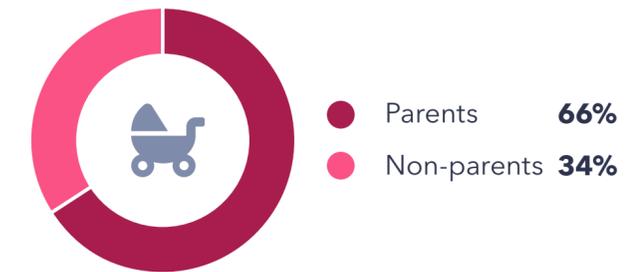
URBAN CONTEXT



RELATIONSHIP STATUS



PARENTAL STATUS



*Full-time parent/ stay-at-home parent



Question: Which of the following best describes your gender? | How old are you? | What is your current working status? | Where is your household located? | What best describes your marital status? | How many children do you have?

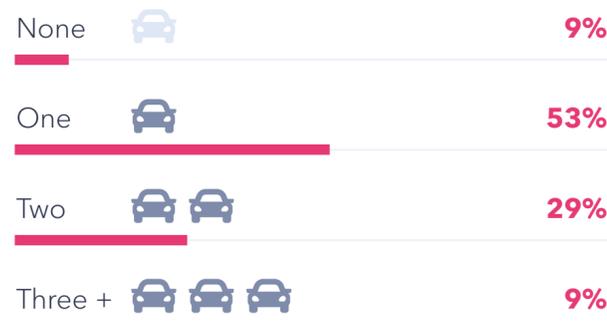
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

Who are affluent consumers?

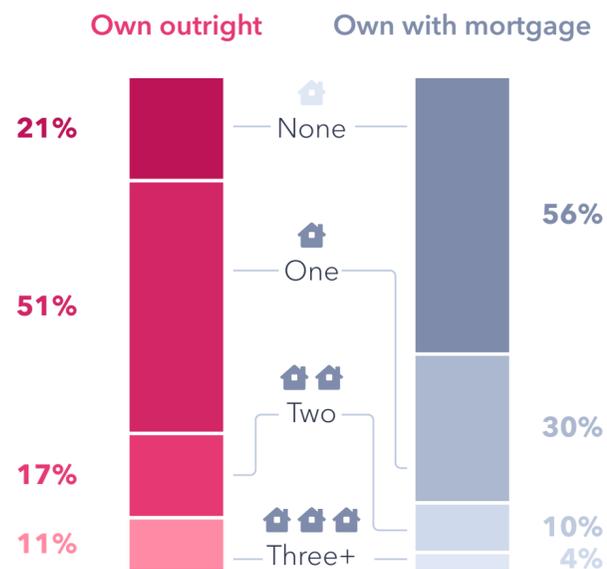
WEALTH

% of affluent consumers who own the following

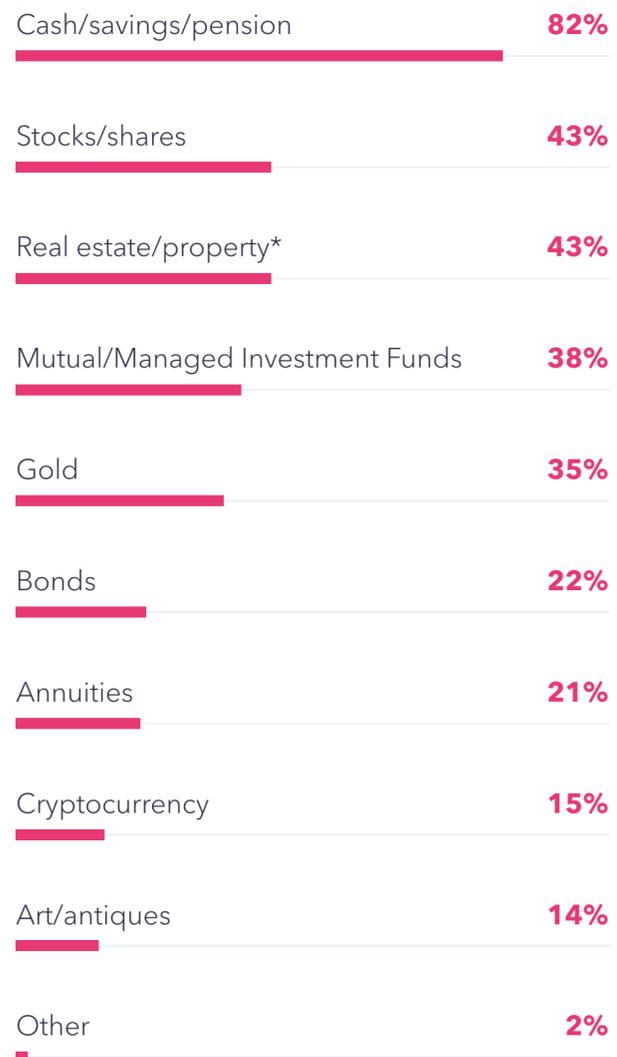
Car ownership



Property ownership



TYPES OF SAVINGS



Globally, affluent consumers make up 16% of the online population. Although they display a fairly broad array of demographic traits, they have a noticeably high representation among full-time working males, aged 25-44, married with children, and living in an urban environment.

We see great differences in gender across regions, though. The largest gender gap is in North America where only 37% of affluent consumers are female - the Middle East and Africa isn't too far behind at 39%. **In APAC, we see a much more balanced picture with 52% of affluent consumers being men and 48% being women.**

66% of affluent consumers think their personal finances will get better in the next 6 months (14% more likely than the global average)

Even though the majority of this group are parents, they're highly work-oriented; a theme that's evident throughout the report. Just over 90% are in full-time work, part-time work, or self-employed compared to just over 70% of internet users globally. **They also have considerable decision-making power** - 54% are decision makers and 29% are senior-decision makers in their line of work. Unsurprisingly then, the majority of this group are educated to university or postgraduate level.

*Other than the house that you live in



Question: How many cars/vans does your household own? | How many houses/properties do you own? | What kind of savings/investments do you have?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

02

Affluent consumers

Attitudes & lifestyle

Ambition and status underpin this group

THEY'RE AMBITIOUS, CAREER-DRIVEN, AND BRAND-ORIENTED

% of affluent consumers who agree with the following statements (sorted by over-index)

		IDX
I am proactive about investing money	67%	1.38
I would buy a product/service simply for the experience of being part of the community built around it	51%	1.33
I like to keep up with the latest fashions	61%	1.31
Other people view me as adventurous	63%	1.30
I tend to buy the premium version of a product	70%	1.29
I am a brand conscious person	64%	1.29
I tend to opt in for personalized loyalty rewards from brands	62%	1.28
I am a risk taker	59%	1.26
I like to stand out in a crowd	54%	1.25
I tend to buy brands I see advertised	56%	1.23

Affluent consumers are a highly ambitious, career-driven, and status-oriented audience.

They're 1.2x as likely as the average to say they're career oriented and that money is the best measure of success. Looking at our [attitudinal segmentation](#), we also see they're 1.6x and 1.5x as likely as the average to fall into the cosmopolitan and status seeker segmentations, respectively.

Additionally, this group is highly image-oriented and brand-aware. Around 2 in 3 say they like to keep up with the latest fashions and over half like to stand out in a crowd. **This audience likes to make an impact, and brands can help them along the way.** It's clear they value premium well-known brands that will enable them to stand out among their peers,

Over 1 in 3 have visited an online casino, gambling, betting or lottery service via any device in the past month (1.4x the average)

with **70% of them saying they tend to buy the premium version of a product.** Unsurprisingly, only 6% fall into the economical segment (those who seek value above all else in their purchases) which shows that this audience prioritizes brand status over price. This suggests they're a prime audience for luxury brands as they're highly brand-conscious and don't shy away from paying more for what they want.

Given that they're wealthy, well-educated, primarily senior business people, it makes sense that they over-index for business and finance related interests. They're 1.5x as likely as the average to be interested in investments, business, and gambling. Their business mindset is also reflected in their reasons for using the internet. Their biggest over-indexes are business-related networking (Index 1.48), managing finances/savings (Index 1.45), and business-related research (Index 1.42). Considering this, along with their engagement in banking online, it's a clear indication that they're also a key audience for the Fintech sector.



Question: To what extent do you agree/disagree with the statements below on your perception of yourself? (Somewhat/strongly agree)
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

03

Affluent consumers

Tech behaviors

Technology is central, but there's a caveat

32% of affluent consumers have tracked their screen time or set limits for certain apps in the last month (1.4x the global average)

Looking beyond smartphone ownership, which is in line with the global average, **what really makes this group tick is smart tech.** They're considerably more likely to own a range of smart devices: **24% own a smartwatch (Index 1.89), 19% own a smart home product (Index 1.69), and 49% own a smart TV (Index 1.25).**

Smartwatch/smart wristband ownership is particularly high in APAC, with 29% of affluent consumers there owning a smartwatch and 21% owning a smart wristband; while in North America, smart home product ownership is the biggest of all regions at 26%. This is likely down to the popularity of smart home assistants in this region.

Looking at the specific smart home devices affluent consumers own, 66% own a smart speaker like an Apple HomePod or Amazon Echo, 48% own a smart security product like a

remotely controlled doorbell, and 47% own a smart utility product like a remotely controlled thermostat (they're 23% more likely than average to own a smart security product).

We also see some key differences emerge in their attitudes toward technology. Our data shows that around 2 in 3 say having the latest technological products is very important to them (Index 1.25), they feel more insecure without their mobile phone than their wallet (Index 1.17), and that it's critical for them to be contactable at all times in their private life (Index 1.15).

All of this highlights just how central technology is in their lives, but, perhaps more interestingly, we're also seeing signs of tech frustration emerge. Over 2 in 5 say that technology makes life more complicated (18% more likely than average) and around 1 in 3 say they don't understand computers or new technology (22% more likely than average). Considering that we live in an always-on society, while simultaneously dealing with widespread data privacy breaches, it's little wonder that affluent consumers are feeling worried and overwhelmed.

SMART TECH IS KEY

% of affluent consumers who own the following devices (sorted by over-index)



TECH IS VITAL, BUT FRUSTRATION IS SETTING IN

% of affluent consumers who agree with the following (sorted by over-index)

Statement	Agreement %	Index (IDX)
Having the latest technological products is very important to me	65%	1.25
I just don't understand computers and new technology	32%	1.22
Technology makes life more complicated	42%	1.18
I feel more insecure without my mobile phone than my wallet	64%	1.17
It's critical for me to be able to be contactable at all times in terms of my private life	68%	1.15



Question: Which of the following devices do you own? | To what extent do you agree/disagree with the statements below on your outlook on technology and the web? (Somewhat/strongly agree)
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

Online privacy is on the agenda

TOP AD-BLOCKING MOTIVATIONS

% of ad-blocking affluent consumers who say they use ad-blockers for the following reasons

47% There are too many ads on the internet

47% Too many ads are annoying or irrelevant

45% Ads are too intrusive

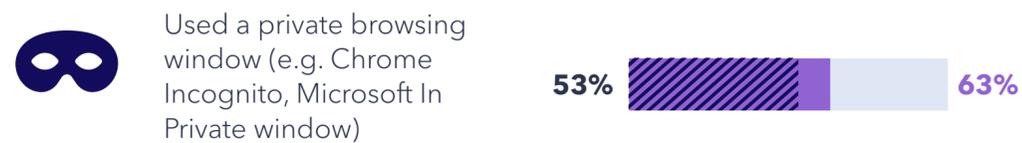
39% Ads take up too much screen space

37% Ads sometimes contain viruses or bugs

ONLINE PRIVACY BEHAVIORS

% who have done the following in the last month

● Affluent consumers ◉ Global average



As highlighted already, **affluent consumers are growing increasingly more concerned with technology and its impact on their lives.** We live in a time where the next data breach story is never too far away, and it's created a general unease and wariness among this group. Just over 3 in 5 are concerned about the internet eroding their personal privacy and close to 7 in 10 worry about how their personal data is being used by companies.

As a result, they're taking action to protect themselves online. **Over 60% of affluent consumers have used a private browsing window and 56% have used an ad-blocker**

Our attitudinal data reveals that 67% of affluent consumers fit the privacy conscious profile

in the past month (rising to 69% for 16-24-year-olds). On a regional level, APAC and the Middle East and Africa are leading the way for ad-blocking behaviors (61% and 56% respectively). Across all the privacy measures we track, affluent consumers are using them more than the average internet user. The main reasons for ad-blocking among this audience are sheer frustration with the number of ads on the internet and their irrelevance.

It's important for marketers to bear in mind that this group is very open to interacting with brands. Marketers should focus on building upon their natural keenness for interaction in a way that's not intrusive and is relevant to them. As users' expectations continue to evolve, any brand will do well to keep transparency and user control front-of-mind in everything they do - it's key to building brand trust.



Question: In the last month, which of these have you done? | Why do you use an ad-blocker?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64 and 12,121 ad-blocking affluent consumers aged 16-64

Unplugging is the new luxury

Not so long ago, computers were a luxury. In 1984, Apple’s first Mac cost the equivalent of more than \$6,000 today. Fast forward to 2019, and a basic Chromebook can be bought for \$200. Computers and connectivity are no longer reserved for the affluent and high-powered.

As we mentioned earlier though - with greater access, comes concern about technology’s effect on our lives and our health. **A desire to unplug is fast emerging among the wealthiest consumers. As with many commodities before it, the human touch is increasingly becoming a premium.**

Across a range of mature markets, we found that higher-earning internet users spend less time on mobile, desktop, and TV. From custom research in the U.S., those in the highest income bracket are also much more likely to remove social media apps or email from their phones, and reduce the amount of TV they watch.

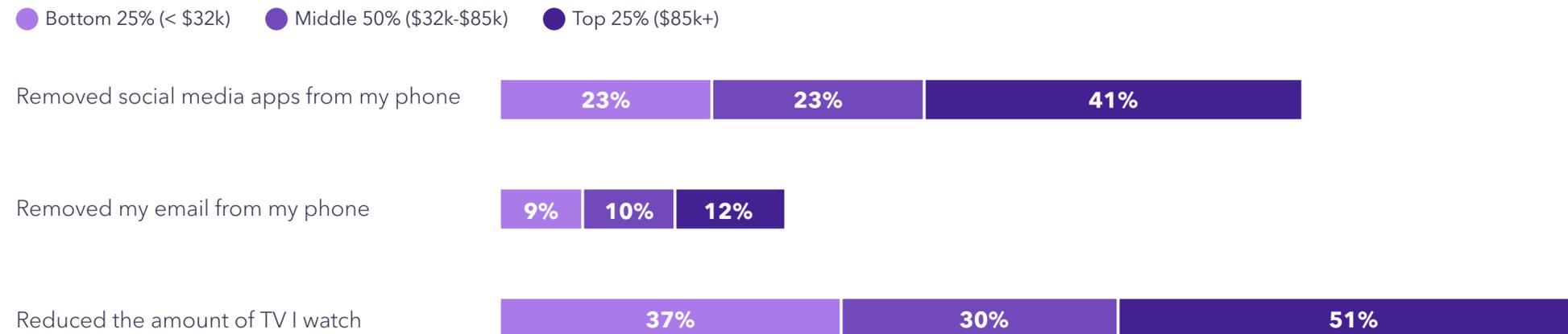
The practical implications of this trend span across consumer and B2B industries. As technology leads to more jobs becoming automated, many experts predict that high-touch, ultra-humanized jobs and services will become extremely valuable. On top of this, the

move away from technology among the most affluent internet users will redefine the luxury market, placing human contact at the center of it. Marketers looking to forge a sustainable path for luxury need to keep this in mind, and consider more customized, humanized experiences. To learn more about this and the latest trends, clients can download our Connecting the Dots report [here](#), which covers the must-know trends for 2020.

U.S. consumers in the top income bracket are nearly twice as likely as middle and low-income earners to prefer human interaction for customer service

OPTING OUT OF TECHNOLOGY IS OFTEN A PRIVILEGE OF HIGH EARNERS

% of internet users in the U.S. who report having recently done the following



Question: Have you recently done any of the following things in order to take a “break” from technology?
Source: GlobalWebIndex September 2019
Base: 2,138 (U.S.) internet users aged 16-64

The smart home gets even smarter



At the latest CES in Las Vegas this year, Samsung **unveiled** their new smart product called Ballie, a tennis ball-shaped robot. It gave consumers an exciting look into the future of smart assistants, or “life companions”. Unlike current voice assistants such as Amazon Echo which wait passively for instructions, Ballie actively moves around the home, responds to its owner’s mood and needs, directs other smart

devices, and makes real-time decisions. It’s unclear when Ballie will launch or what the price point will be, but considering affluent consumers are big adopters of the latest smart tech, they will be a key audience to reach. Of course, maintaining privacy is very important for this group so it’s something Samsung, and other players, will need to prioritize.

04

Affluent consumers

Media consumption

Entertainment habits

Affluent consumers are spending longer on all forms of media compared to the average internet user. They've embraced all digital channels, while still remaining active users of more traditional media.

They're avid users of both online and linear TV, spending roughly 3 hours and 40 minutes across both per day. **While they're still spending longer watching linear TV than online TV (roughly 15 minutes more), the gap between the two is smaller than it is for the global internet user.** From a regional perspective, linear TV outperforms online TV in all regions except APAC.

Looking at our media [segmentation](#) (which groups users based on how long they typically spend on social media), we can see that affluent consumers are 1.4x as likely as the average to be high/heavy readers of physical print press, however this is less important than other forms of online media. For example, they're heavier

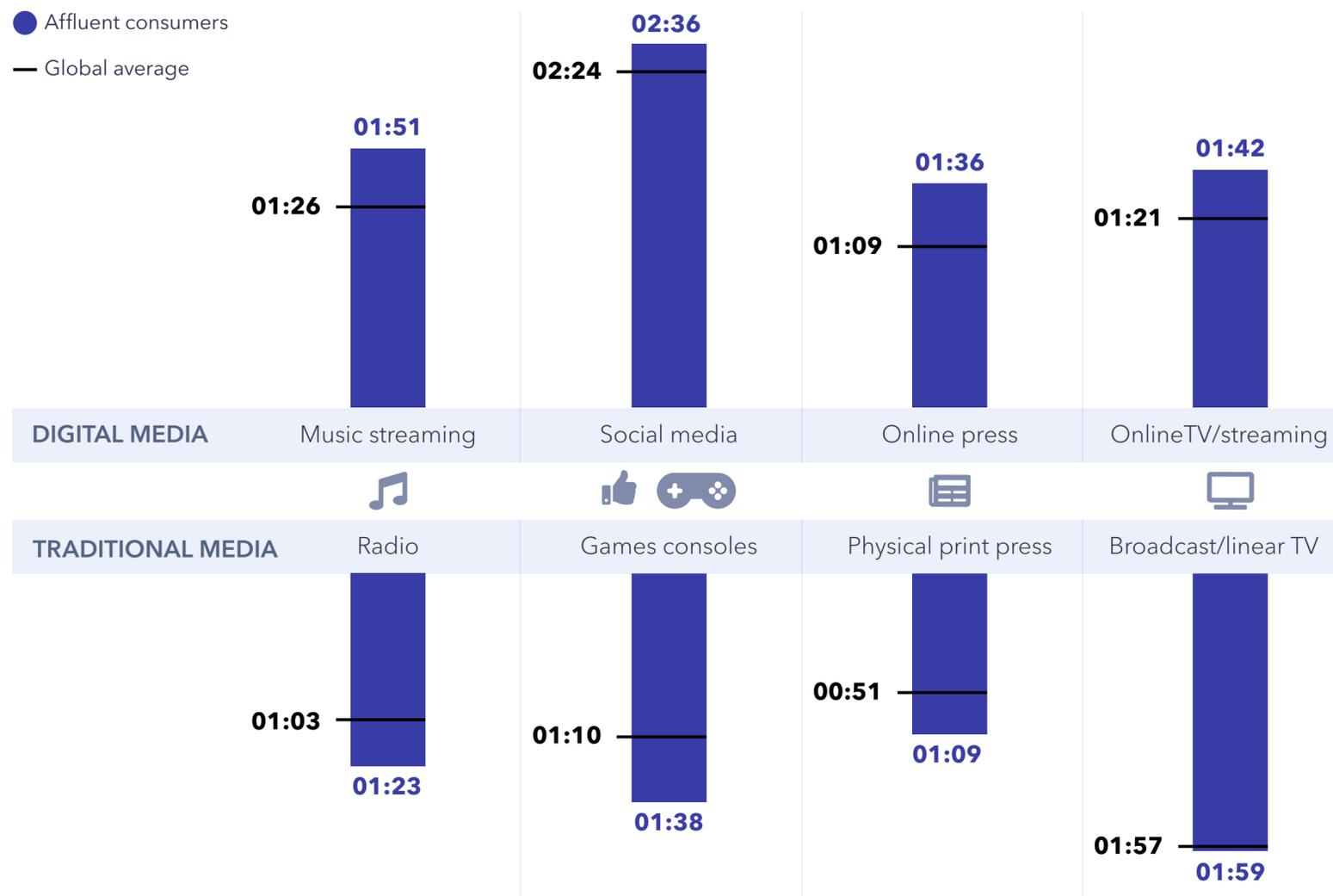
users of online press, spending just shy of 30 minutes longer per day reading online news than physical print. This is the case across all regions.

This group is also particularly keen on music streaming, spending close to 2 hours listening per day. When we look at the digital content they've paid for in the past month, we see that 41% have paid for a music streaming service (Index 1.59), 38% have paid for a movie or TV streaming service (Index 1.40), and 30% have paid for a music download (Index 1.49). Overall, social media is where they spend the most time online per day, which we'll take a deeper dive into next.

76% of affluent consumers watch subscription services like Netflix at least weekly (1.3x the global average)

DIGITAL VS. TRADITIONAL MEDIA

Average time spent on the following each day in hh:mm



Question: On an average day, how long do you spend on different types of media?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64 and 145,271 internet users aged 16-64

Social media behavior

Affluent consumers are spending the greatest portion of their time on social media per day at 2 hours and 36 minutes – just over 10 minutes longer than the global average.

We see some differences with age. Consistent with global patterns, **younger affluent consumers spend longer on social media than their older counterparts.** For example, 16-34-year-olds are spending 3 hours and 8 minutes on social media per day compared to 1 hour and 17 minutes for 55-64-year-olds.

Outside of China, Facebook remains the biggest platform by membership overall, with YouTube in strong second place. If we focus on those who have visited or used services in the past month, YouTube rises to the top position. It's the only major social service to have more people visiting than those who are a member, revealing that significant numbers of its visitors are either not logged into their accounts, or are not members in the first place. **Affluent consumers also have an average number of 11.7 accounts compared to the global average of 8.6.** This could be partly attributed

to their usage of work-related platforms like Slack (Index 1.35), LinkedIn (Index 1.33), Viadeo (Index 1.38), and Yammer (Index 1.29).

Perhaps more surprisingly, this group is also keen on **visual-led social networks like Instagram and Pinterest.** Close to 7 in 10 use Instagram and over 1 in 3 use Pinterest each month. **Their love of visual content is something that brands can tap into, by showcasing lifestyles and promoting inspiration.** This could be especially useful considering this group values status. Additionally, affluent consumers are highly engaged with brands on Instagram – a quarter of them have commented on a brand's photo or video clip and clicked on a product tagged by a brand/seller in the last month. Their eagerness to interact with brands is something we'll touch on more in this report.

1 in 3 affluent consumers who use Instagram have visited a company, brand or product's page in the past month

TOP SOCIAL MEDIA PLATFORMS

% of affluent consumers outside China who have accounts/use the following social media platforms



Question: On which of the following services do you have an account? | Which of the following sites / applications have you visited or used in the past month via your PC / Laptop, Mobile or Tablet?
Source: GlobalWebIndex Q3 2019 **Base:** 20,456 affluent consumers aged 16-64 (excluding China)

Why are they using social media?

USING SOCIAL MEDIA WITH A PURPOSE

% of affluent consumers who say the following are the main reasons they use social media (sorted by over-index)



We're now sharing huge amounts of content online, but the way we're sharing it is changing. Social media sites were once a place where users would comfortably share details about their personal life to hundreds of followers. **Fast forward to 2019, and we're seeing users go to social media with more of a purpose in mind.** Affluent consumers in particular over-index for purpose-driven social media activities. They're 1.4x as likely as the average to use social media to promote/support charitable causes and to use it to network for work (19% and 31% do, respectively). Additionally, we're seeing **social media's role in the purchase journey becoming more prominent; around 1 in 3 say they use social media to research/find products to buy.**

While affluent consumers over-index compared to the global average for sharing their opinion and details of what they're doing in their daily life, they're doing so less nowadays. For example, **40% of affluent consumers in 2016 used social media to share their opinion compared to 32% in 2019 - a 20% decrease.**



Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

Why are they using social media?



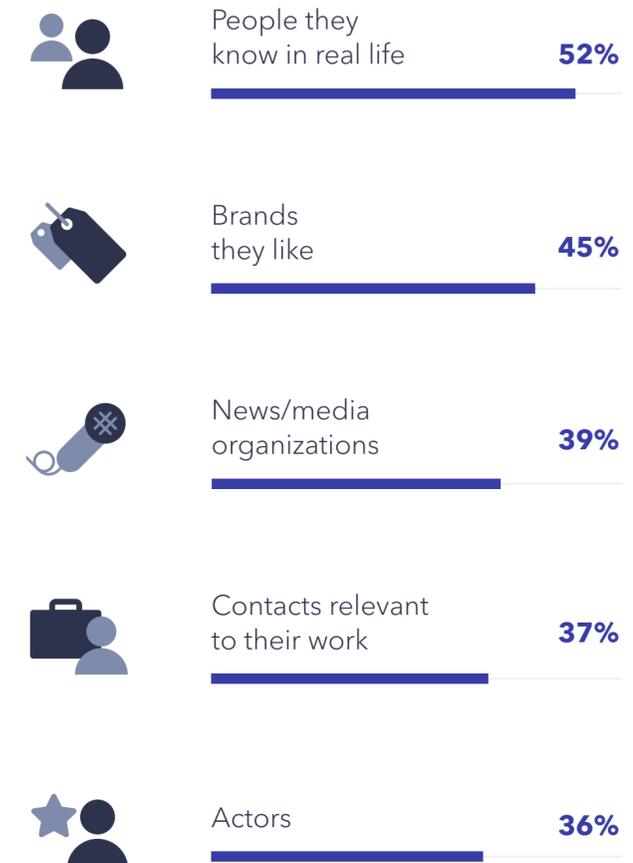
At the same time, entertainment-related activities like keeping up with news and watching sports are on the rise. To put this in perspective, using social media to watch/follow sports has jumped by a massive 180% in the same timeframe - 28% currently use social media for this reason compared to just 10% back in 2016.

When we look at who they follow on social media, the fact that **a higher share of affluent consumers say they follow brands they like than all 15 other options we track**, except for people they know in real life, shows just how keen they are to interact with brands on social media.

Affluent consumers are 1.6x as likely as the average to follow journalists and entrepreneurs/business people on social media

TOP 5 FOLLOWING ON SOCIAL MEDIA

% of affluent consumers who follow these people/organizations on social media



Question: Who do you follow on social media?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

05

Affluent consumers

The purchase journey

Mobile commerce

In line with their behavior to adopt new tech, this audience also follows the latest trends for mobile commerce. For all stages of the purchase journey – from researching and buying, through to reviewing – the mobile is now the go-to device for affluent consumers.

Our data shows that 40% of affluent consumers have used a mobile payment service in the last

month compared to 27% globally. By region, this spikes to 47% for the highly tech-savvy, mobile-first, and younger internet users in APAC, and drops significantly to 27% in North America, making it the only region to under-index for this mobile activity.

Usage of QR codes has also gained **traction** again in recent times. **Close to half of affluent consumers have**

used or scanned a QR code in the past month (compared to 38% for the global average). Usage of QR codes reaches a high for 35-44s (52%), but even among 55-64s, it remains relatively high (40%).

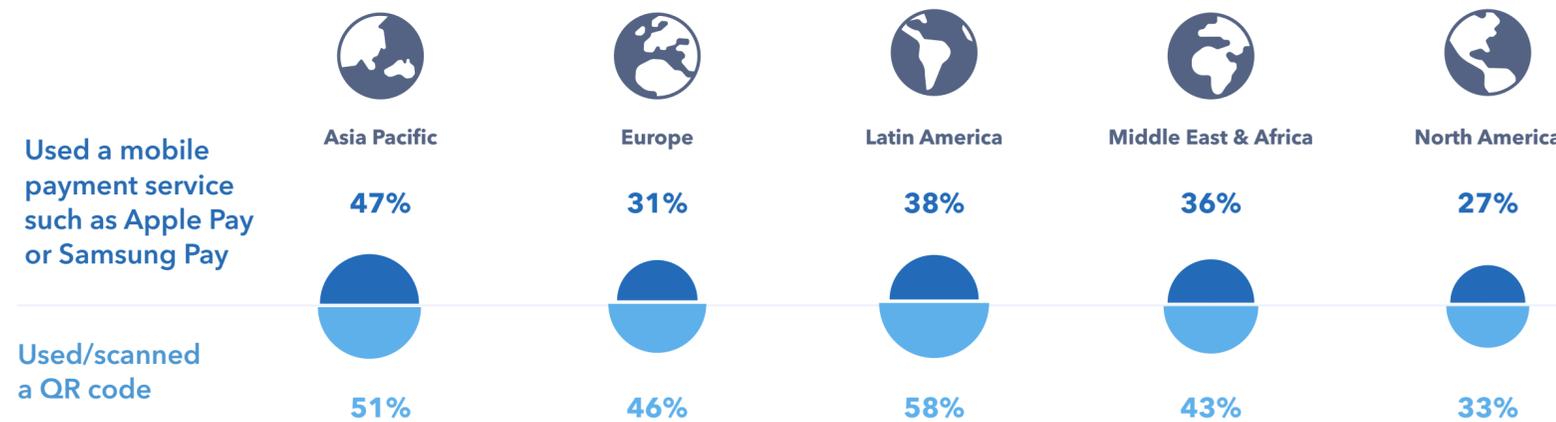
Mobiles are key for a whole host of commerce activities among this group. Not only are they searching and buying products online using their mobiles, they're also **22%**

more likely than average to post a review of a product via their mobile (41% do). This again reinforces just how vocal they are about brands and products they've used. Around two-thirds of this group say they like to seek an expert opinion before purchasing products, which shows they also rate the opinion of others.

45% of affluent consumers aged 25-34 have used a mobile payment service in the past month

MOBILE PAYMENTS BY REGION

% of affluent consumers who have done the following on their mobile in the last month



MOBILE IS KEY FOR PURCHASING ACTIVITIES

% of affluent consumers who have done the following in the last month on these devices

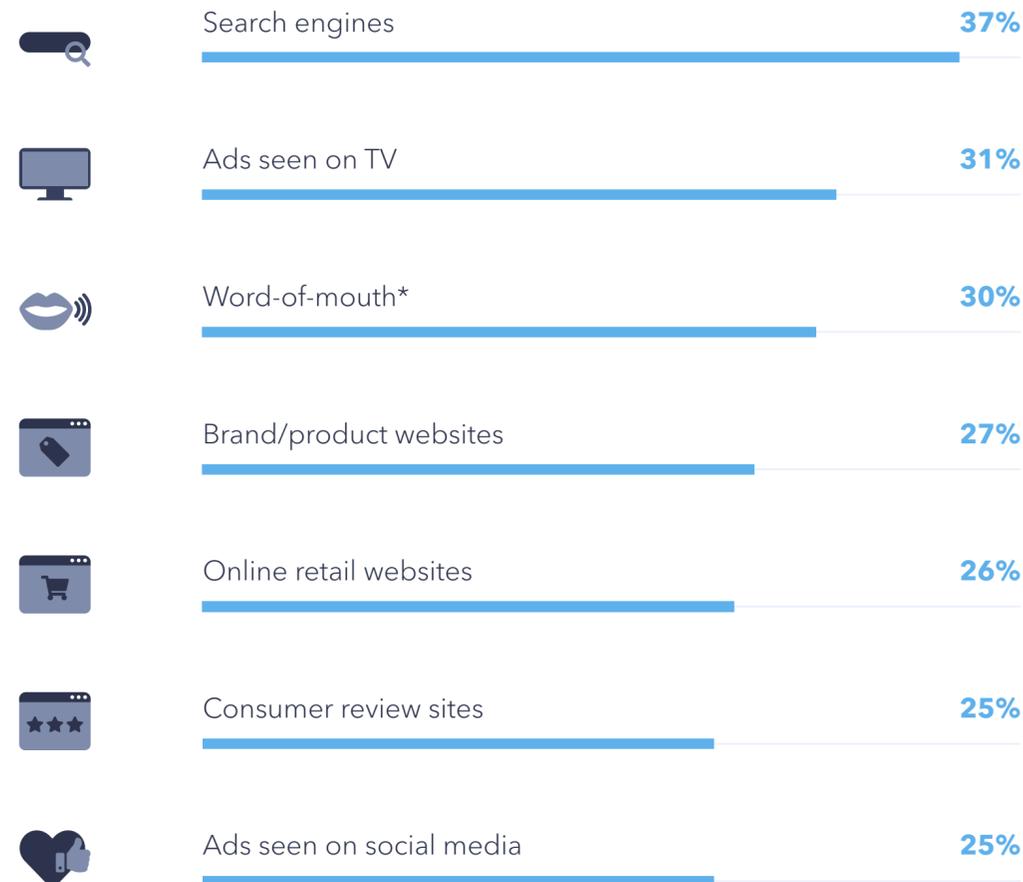


Question: Which of these have you done on your mobile in the last month? | In the past month, which of the following things have you done on the internet via any device?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

How do they discover brands?

TOP METHODS OF BRAND DISCOVERY

% of affluent consumers who find out about brands and products in the following ways



Similar to the average internet user, **search engines are the most popular form of brand discovery among this group and the go-to for 37% of affluent consumers.** This is followed by ads seen on TV and word-of-mouth recommendations, which are more or less on a par with each other. However, this audience under-indexes for discovery via ads seen on TV compared to the global average.

It's clear they value the opinion of others as 1 in 4 turn to consumer review sites for brand discovery (1.3x the global average). Notably, even though this audience has a greater tendency to ad-block, 1 in 4 are still discovering brands through ads seen on websites, suggesting

that online advertising can still be effective for this group.

Again, we can see just how brand-oriented this group is with 27% of them using brand/product websites and 26% using online retail sites for discovery. **This audience is also particularly receptive to influencers, especially in emerging regions.** For example, around 1 in 5 affluent consumers in APAC (Index 1.47) and the Middle East and Africa (Index 1.43) find out about brands through endorsements by celebrities or well-known individuals compared to just 7% in North America. A similar percentage in APAC, Latin America, and the Middle East and Africa also use posts or reviews from expert bloggers as sources of brand discovery.

Vlogs are an effective source of brand discovery for around 1 in 5 affluent consumers in APAC and Latin America

*Word-of-mouth recommendations from friend or family members



Question: How do you typically find out about new brands and products?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

Where do they go for product research?

In line with how they discover brands, **search engines remain the top option for online research for close to half of affluent consumers.** Notably, unlike the global average, consumer reviews overtake social networks overall. This is driven by older affluent consumers though – younger consumers aged 16-34 still opt for social networks over consumer reviews. This jumps to over half for 16-34s in Latin America, and just under half for this group in the Middle East and Africa. This showcases the **increasingly important role that social media plays in the purchase journey for younger internet users in these regions.**

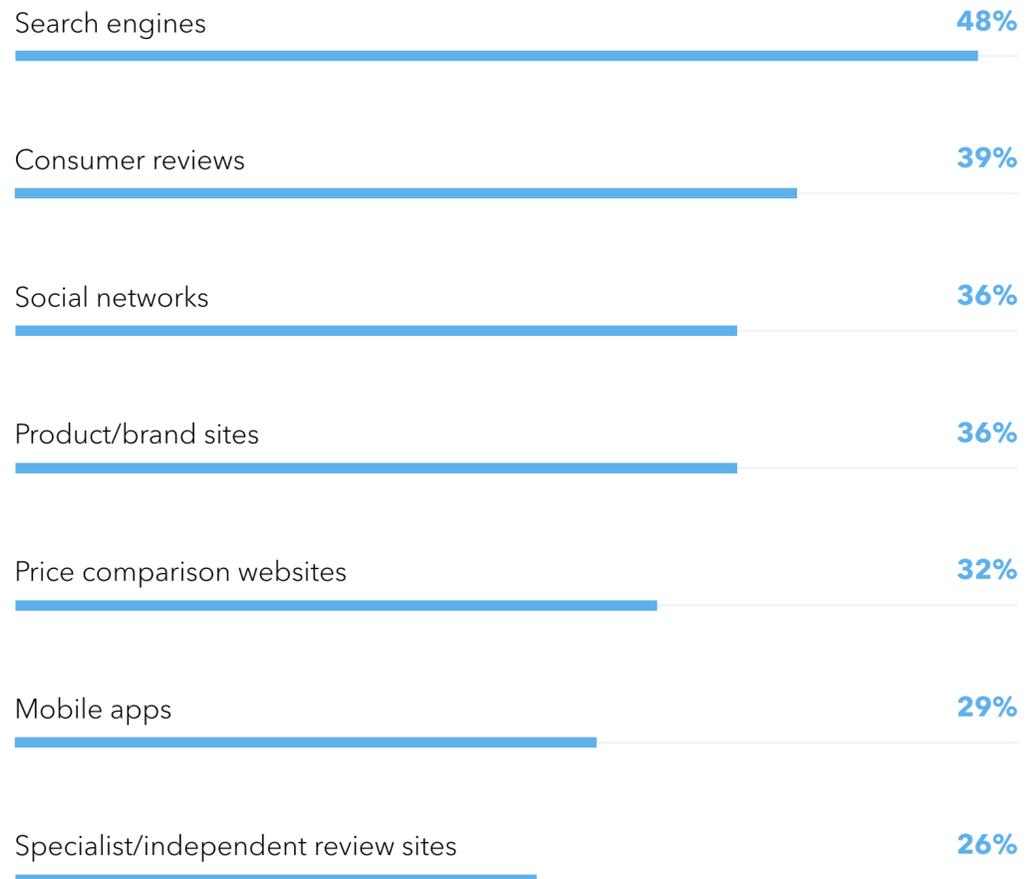
It's in these emerging regions that social platforms provide important brand-consumer touchpoints as well. For example, **affluent consumers in APAC, Latin America, and the Middle East & Africa are 1.5x as likely as the average to click on a brand's sponsored**

post on social media. Affluent consumers in these regions over-index significantly for engaging with brands on social media, whether that's sharing a brand's post, uploading a photo/video to a brand's social media page, or asking a question to a brand on a social network.

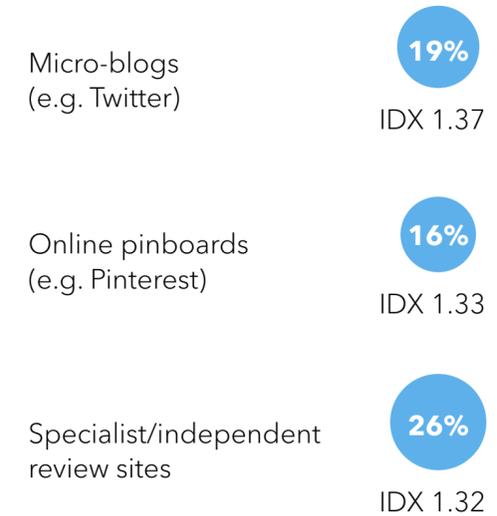
Within social media, their preference for visual forms of media influence their product research habits too. Micro-blogs like Twitter (Index 1.37) and online pinboards like Pinterest (Index 1.33) are two of their biggest over-indexes. **Above all, affluent consumers are not simply buying products, they want to be actively involved with brands and social networks are the perfect avenue to foster these relationships.**

TOP METHODS OF ONLINE PRODUCT RESEARCH

% of affluent consumers who find out more information about products/services using the following



TOP 3 OVER-INDEXES



Affluent consumers are 1.5x the global average to provide ideas for a new product/design and 1.4x as likely to interact with a brand on a messaging app



Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64



• MARKET IN FOCUS •

The young and wealthy are driving luxury

China now accounts for a **third** of global luxury spending, with these figures driven by growing ecommerce sales in lower-tier cities. Younger generations like Gen Z (aged 16-22) are key to the growth of China's luxury market. In the past month alone, 42% of affluent Gen Zs in China have purchased clothes online - more than any other age group and 39% more likely than the average internet user.

Collectively, this young, affluent audience has the potential to shape which brands deserve their (and others') loyalty, making for powerful advocates in online spaces. It's no wonder then that around 2 in 5 of this group in China turn to social media for product research. Additionally, close to 3 in 4 affluent Gen Zs in China posted a review online in the past month, 1.2x the average internet user. This not only highlights just how vocal they are when it comes to brands, but it reinforces the importance of social platforms in their purchase journey.

What motivates them to make a purchase?

Convenience and monetary rewards are the primary purchase drivers, with half picking free delivery and 2 in 5 selecting coupons and discounts. However, they're actually less likely than average to say this.

Looking beyond convenience, examining where they over-index helps us to go further and understand what else makes this audience tick. **Emphasizing their need for status, this group is 1.3x as likely as the average to be motivated by exclusive content or services (23% do)**. Suitably, for such a socially-engaged group, the option to use the "buy" button on a social network is a key driver (Index 1.31), this notably increases in importance for affluent consumers in APAC and the Middle East and Africa. Another key regional difference for **MEA** is the ability to pay with cash on delivery (they're

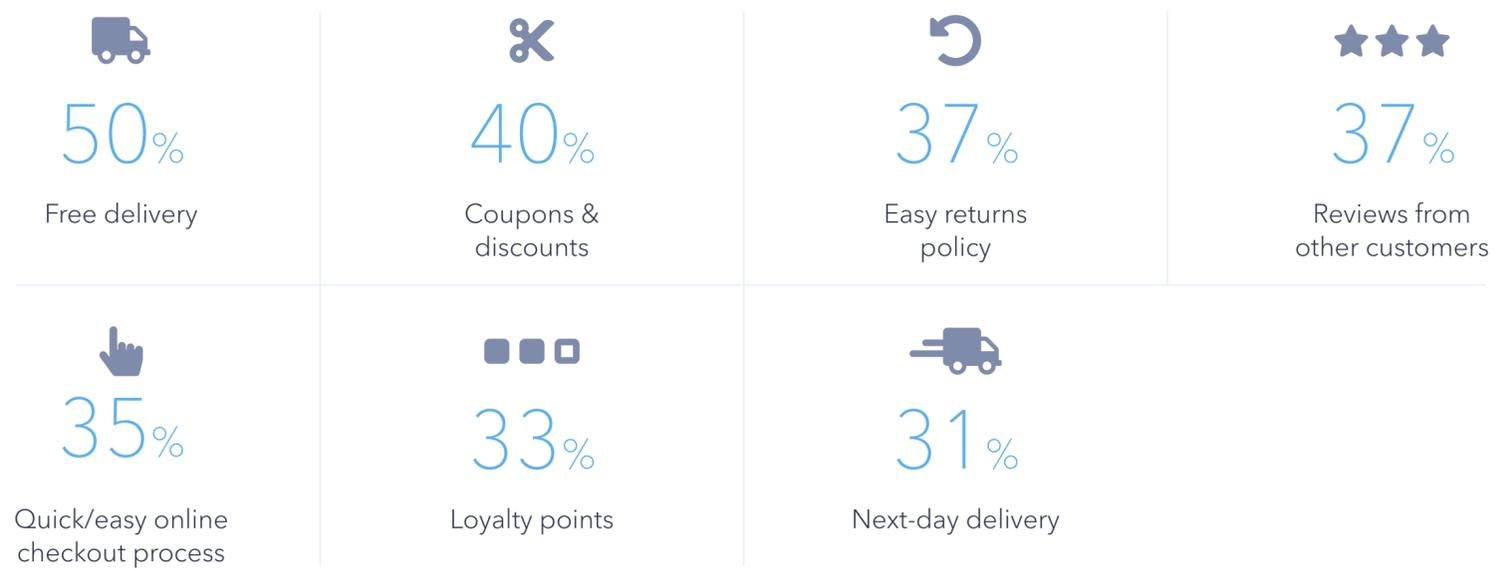
twice as likely to want this than average). This is largely due to the fact this region is primarily cash-first.

We already know that this group values direct communication and involvement with brands so it's no surprise that **a live-chat box to speak to a company is important for over 1 in 5 affluent consumers (Index 1.29)**. Incorporating easy ways to communicate should be something that brands consider in order to effectively keep this group engaged.

Affluent consumers aged 25-34 are 1.3x the global average to buy a product if they know the product/company is environmentally friendly

TOP ONLINE PURCHASE DRIVERS

% of affluent consumers who say the following would motivate them to complete a purchase



TOP 5 OVER-INDEXES

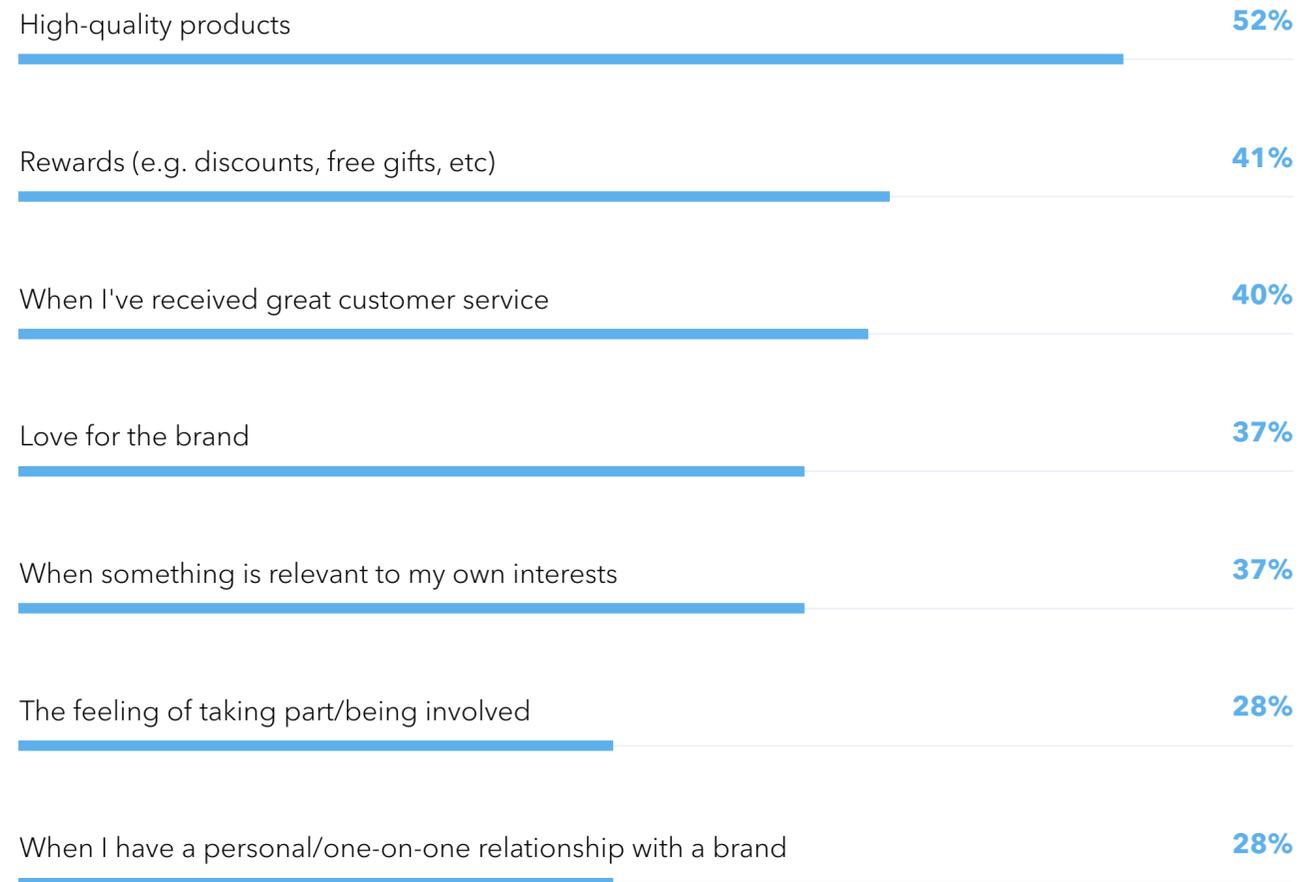


Question: When shopping online, which of these features would most increase your likelihood of buying a product?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

What encourages them to advocate a brand?

TOP BRAND ADVOCACY MOTIVATORS

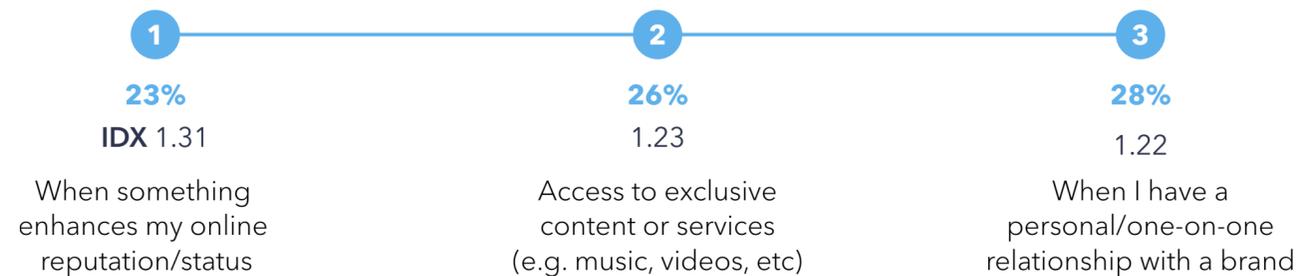
% of affluent consumers who say the following would motivate them to promote their favorite brand online



Quality and rewards like discounts and free gifts top the list for brand advocacy, which is in line with the average internet user. **Aside from these factors, the key to really gaining their loyalty lies in enhancing their status and emphasizing exclusivity.** This group is 1.3x as likely as the average to promote a brand if it enhances their online reputation/status and 1.2x as likely to promote a brand if they get access to exclusive content and services. Exclusivity also shines through when looking at what they want brands to be - they're 16% more likely than average to say they want brands to be exclusive.

Their relationship with brands goes beyond simply making a purchase - they're not passive bystanders, but want to actively participate. Close to 3 in 10 will promote a

TOP 3 OVER-INDEXES



Access to exclusive content or services is 1.4x more important than average for affluent consumers in APAC and Latin America

brand online if they're directly involved or have a personal, one-to-one relationship with a brand. Close to 2 in 5 will do so simply out of love for the brand. Given this, it's absolutely vital that brands listen to these consumers - 45% want brands to listen to customer feedback and 40% want to feel valued.

Successful brands should focus on involving this group in the process as much as possible, for example engaging them in product design or as influencers. They're a vocal group, who know what they want, and brands stand to reap serious rewards if able to engage this lucrative audience.



Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q3 2019 **Base:** 23,261 affluent consumers aged 16-64

Notes on methodology

All figures in this report are drawn from **GlobalWebIndex’s online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 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 Q3 2019 wave of research across 46 countries, with a global sample of 145,271 respondents; and a sample size of 23,261 affluent consumers across 42 markets.

Total sample (Q3 2019) | Affluent consumers

Argentina	1,565	195	Netherlands	1,311	207
Australia	4,056	677	New Zealand	1,298	200
Austria	1,291	186	Nigeria	958	0
Belgium	1,282	195	Philippines	1,627	206
Brazil	2,355	351	Poland	1,875	319
Canada	2,301	391	Portugal	1,288	193
China	15,215	2,805	Romania	1,309	202
Colombia	1,330	216	Russia	2,273	557
Denmark	1,257	192	Saudi Arabia	1,537	149
Egypt	1,788	261	Singapore	2,714	436
France	5,152	882	South Africa	1,548	202
Germany	5,176	873	South Korea	1,278	194
Ghana	847	0	Spain	5,114	885
Hong Kong	1,813	301	Sweden	1,314	189
India	7,594	1,319	Switzerland	1,291	187
Indonesia	1,855	257	Taiwan	1,783	375
Ireland	1,269	191	Thailand	1,570	437
Italy	5,363	152	Turkey	1,536	299
Japan	1,877	876	UAE	1,804	239
Kenya	958	0	UK	10,146	1,854
Malaysia	1,533	188	U.S.A.	25,037	4,375
Mexico	2,619	407	Vietnam	1,604	350
Morocco	947	0			

Notes on methodology

ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically. Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this [document](#).

INTERNET PENETRATION RATES

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

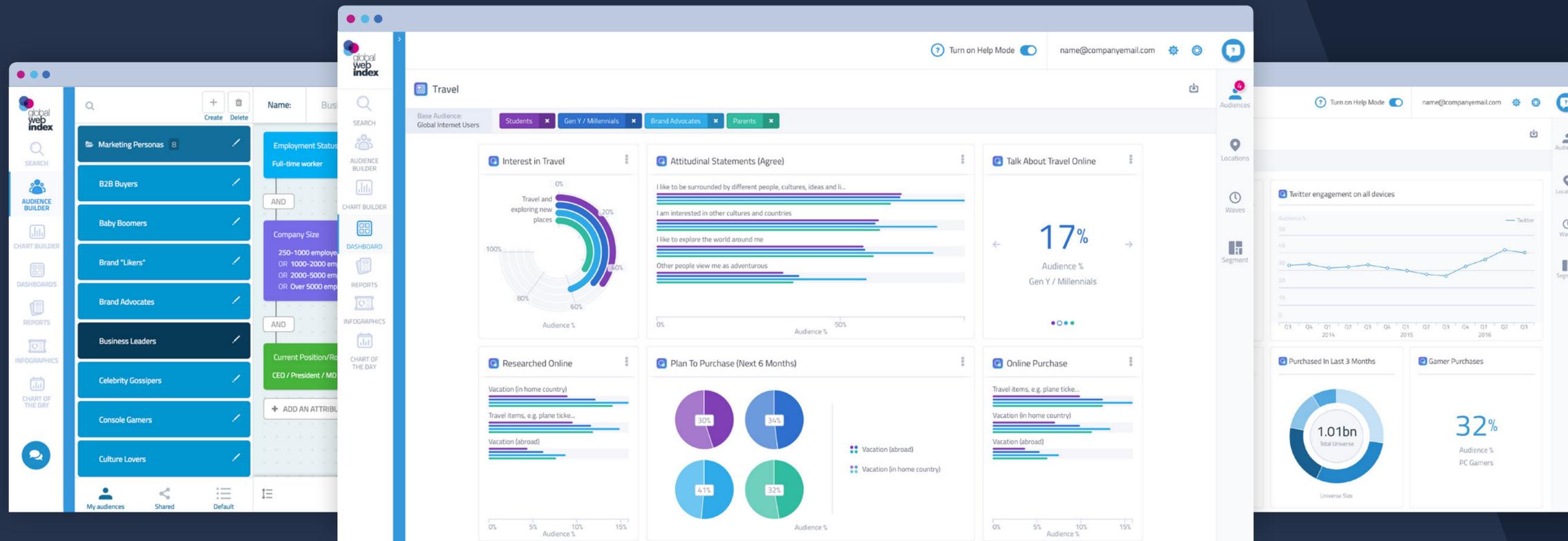
Argentina	78%	Netherlands	93%
Australia	88%	New Zealand	93%
Austria	88%	Nigeria	36%
Belgium	89%	Philippines	64%
Brazil	71%	Poland	79%
Canada	94%	Portugal	78%
China	59%	Romania	72%
Colombia	66%	Russia	80%
Denmark	97%	Saudi Arabia	83%
Egypt	54%	Singapore	85%
France	85%	South Africa	62%
Germany	88%	South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



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