

# Commerce

GlobalWebIndex's biannual report on  
the latest trends in online commerce

FLAGSHIP REPORT 2018

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## Introduction

GlobalWebIndex Commerce presents GlobalWebIndex's very latest figures for online commerce, consumer behaviors, and engagement levels.

Among other topics, this report covers:

- The markets driving online commerce trends
- The role that different devices play in online purchasing
- The changing dynamics of how people are paying for products
- The potential and current impact of social commerce, voice commerce, and New Retail
- Purchase behaviors by category
- Important touchpoints along the path to purchase

## Key Insights

**Mobile devices continue to gain momentum across the purchase journey, but PC is still in the picture.**

Although consumers are increasingly choosing mobile over PC for researching and buying products, the PC is still popular and relevant, especially in the West - where online audiences are somewhat older. The extent to which the devices overlap when it comes to online purchases suggests that brands need to adopt a multi-device perspective of the purchase journey.

**Mobile payments are gathering momentum on a global scale.**

More than 1 in 3 internet users have made a payment using their mobile phones. The rate of adoption of mobile payments varies by market. There's room for greater adoption in fast-growth emerging markets, like Kenya, as well as developed markets like South Korea and Denmark, which have the highest mobile payment adoption in the world. Local solutions are prevailing over global players like PayPal.

**Social media is a go-to in the research and discovery stages of the purchase journey.**

Social networks are increasingly being used for utilitarian purposes, coming to the fore in the purchase journey. In fact, younger consumers look to social media before search engines for information on products.

**Free delivery remains the primary purchase driver across all generations and markets.**

Financial incentives (e.g. rewards and discounts) and consumer reviews rank as the second and third-most prominent drivers in the last stage of the purchase journey. Simplified return processes are catching up and in some regions even surpassing word-of-mouth endorsements.

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# The State of Ecommerce

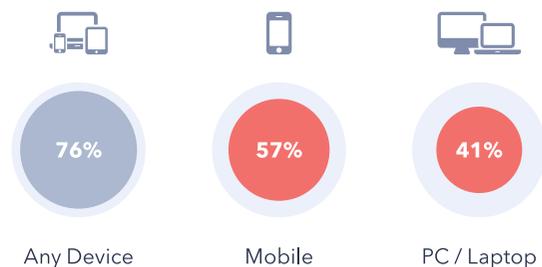
## The State of Ecommerce

PCs have traditionally been the default device for online commerce, as they're seen to offer more protection for sensitive transactions and were ubiquitous when online shopping first took off. The landscape has since shifted. At a global level, for all stages of the purchase journey from researching, to buying through to reviewing, the mobile is now the device of choice. With online banking a mobile-first activity as well, the commerce landscape is being shaped by the smaller screen. There's a small generational gap, however. Internet users over the age of 45 still prefer larger screen devices, which is a major reason PCs and laptops have maintained their lead in Europe and North America for commerce actions.

The PC is not going away any time soon. And internet users aren't exclusively committed to any one device type. If they are buying on mobile, they are likely to buy on PC as well, and vice versa. The large overlap demonstrates how a multi-device approach is crucial throughout the entire purchase journey, as consumers can check-out with either device regardless of where their path began. **Browsing for products and visiting retail stores websites are still firmly multi-device activities, too.** 3 in 4 internet users who have visited a retail store via mobile have done so via PC as well.

### The State of Ecommerce

% of internet users aged 16-64 who have purchased a product online in the past month



### CROSS-DEVICE BUYING

**42%**   
of buyers on mobile purchasing on PC

**59%**   
of buyers on PC purchasing on mobile

### Three-quarters of internet users buy products online

More than 90% of internet users in every demographic group have done some kind of commercial activity during the past month, whether that's researching products, making recommendations, looking for inspiration. Significant numbers visit online retailers like Amazon and Taobao consistently on a monthly basis, ranging from 93% of 25-34-year-olds to 83% of 55-64-year-olds.

76% had made a purchase within the past month, including 69% of those 55-64.

The main difference is regional, rather than generational. In the Middle East and Africa, notably, we're still seeing significantly lower rates of online shopping. In MEA - Kenya, Ghana, Nigeria, Morocco, Egypt, United Arab Emirates, and Saudi Arabia - the proportion of internet users who've made purchases online drops to 54%. There have been no major changes in this area during 2018. It's crept up slowly from 50% in Q2 2017, but the difference is marginal.

Despite the prevalence of mobile payment apps, these markets retain many cash-first consumers who might explore products online but tend to finalize offline. This might be more due to the practical and logistical challenges of online payments than a reflection of a consumer preference: 44% of internet users in MEA say that a cash-on-delivery option would motivate them to make a purchase online.

The top ecommerce markets are split evenly between Asian and Western markets, despite their digital landscapes' differences. The shift to ecommerce can be seen across the world, but it's driven by local and regional players with no single platform yet dominating.



**Question:** In the past month, which of the following things have you done on the internet on your PC/Laptop/Mobile/Tablet? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

## The Growth of Mobile Payments

Mobiles aren't just the most popular device for buying online globally, they're also a preferred payment method in their own right and one which has helped grow ecommerce across the world. **Use of mobile payments has grown rapidly**, from 26% of the online population in 2016 to 37% in our latest wave of research.

Much of this growth has happened in countries where a lack of credit card infrastructure has allowed challengers to leapfrog traditional payment providers and claim a competitive position in that space, like m-Pesa was able to do in its home market, Kenya.

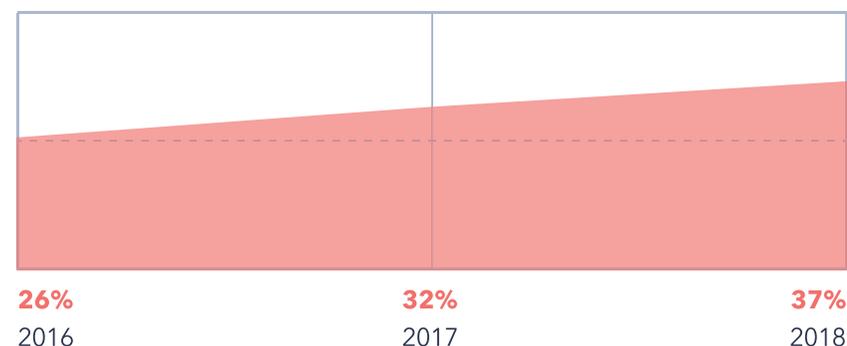
While we have seen a significant increase in this behavior, some barriers to growth have emerged as well. These may lie in consumer concerns about fraud and data security, though this is a two-way street, as mobile payments can allow for more personal security than carrying cash. The ease and ubiquity of mobile payment systems, where consumers crucially don't have to be at home or in front of a computer to do minor payments and transfers, has addressed many of those privacy concerns, which have historically been widespread whenever a new payment form is introduced.

**Although fast-growth markets currently take the lead for mobile payments, there is ripe opportunity in developed markets, too.**

Our data shows that mobile payments are spreading in mature markets like Sweden, where 33% have used a mobile payments service (Svipp) in the last month, and the UK (26%).

### Mobile Payments

% of internet users paying for an item / service with their mobile



A market recently added to our dataset, Denmark, has replaced South Korea as the market with the highest rate of online payment adoption. Since its launch in 2013, Danske Bank's MobilePay was able to skate into a leading position in the absence of competition, leveraging the power of the Danske Bank brand, an easy interface, and the consumers' preference for single solutions.

Market leaders like Apple, Alibaba-owned Ant Financial, and Samsung are looking to gain a foothold during the critical development periods where consumer habits become entrenched. The investment resulting from this expansion is likely to drive uptake in the coming years.

**Mobile points are growing strongly outside mobile-first markets, too**

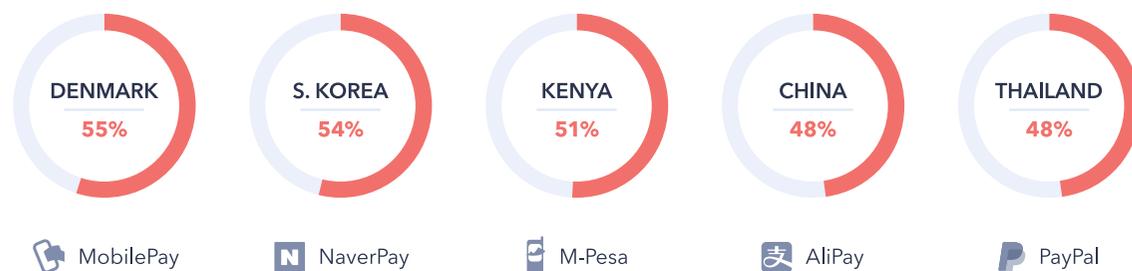


**Question:** Which of the following have you done on your mobile phone in the past month?

**Source:** GlobalWebIndex Q3 2018 **Base:** 211,023 (2016) / 370,051 (2017) / 335,611 (2018) Internet Users aged 16-64

## The Growth of Mobile Payments

### Top 5 countries for mobile payments and their most used services



But by looking at the market leaders in countries where mobile payments are used most often, we can see that the dominant players are often domestic companies, not global ones. **Local providers are detached from global competition by regulatory, cultural and commercial constraints.** This has driven **Ant Financial's strategy** of investing and leveraging in local partners, including India's top service PayTM, which they have a 40% stake in.

Denmark's MobilePay is indicative of this trend, as well. Seeing the space for mobile payments hadn't been filled, DanskeBank acted unilaterally to roll out their service to all holders of a Danish payment card and phone number, without the need to sign up. They quickly moved into a dominating position in a way payment providers in other Western markets haven't seen.

Unlike PayPal, for instance, it managed to be adopted for everything from parents' allowance transfers, to point-of-sales solutions in major retail chains. It's achieved the kind of personal and commercial ubiquity that industry watchers had mostly associated with developing markets.



**Question:** Which of these services have you used to pay for an item/service using your phone? **Source:** GlobalWebIndex Q3 2018  
**Base:** 113,932 Internet Users aged 16-64

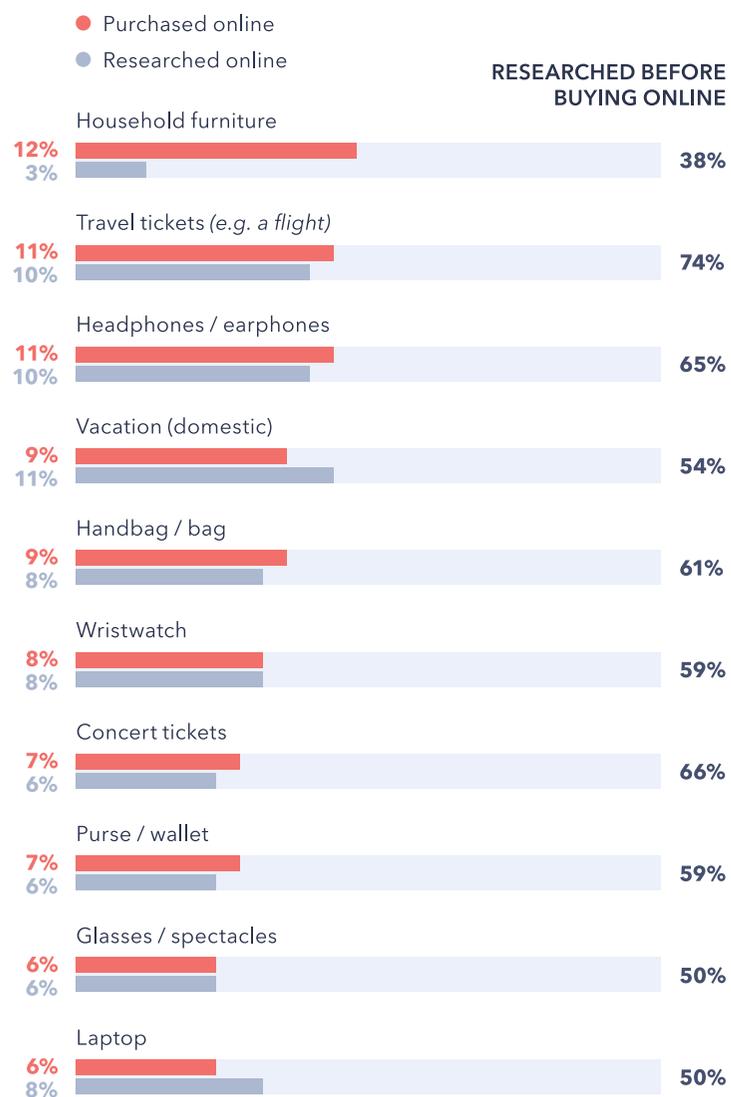
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# Purchasing Habits by Category

## Purchasing Habits by Category

### Online Buying vs. Researching | Major purchases

% of internet users who do the following for top 10 products in last month



When it comes to online purchases, not all product categories are made equal. Certain categories lend themselves more to buying online, whereas for others, using online media as an information resource is paramount.

Higher-priced products are researched online more than they are bought, with cars and domestic vacations at the top of the list. **Household furniture, for example, is one major purchase category that has seen more buying than researching online.** Just a third of those who have bought furniture for the home have looked it up online beforehand, compared to more than half for other high-ticket purchases. Showrooming, whereby consumers make online purchases after visiting retail sites, is part of the explanation.



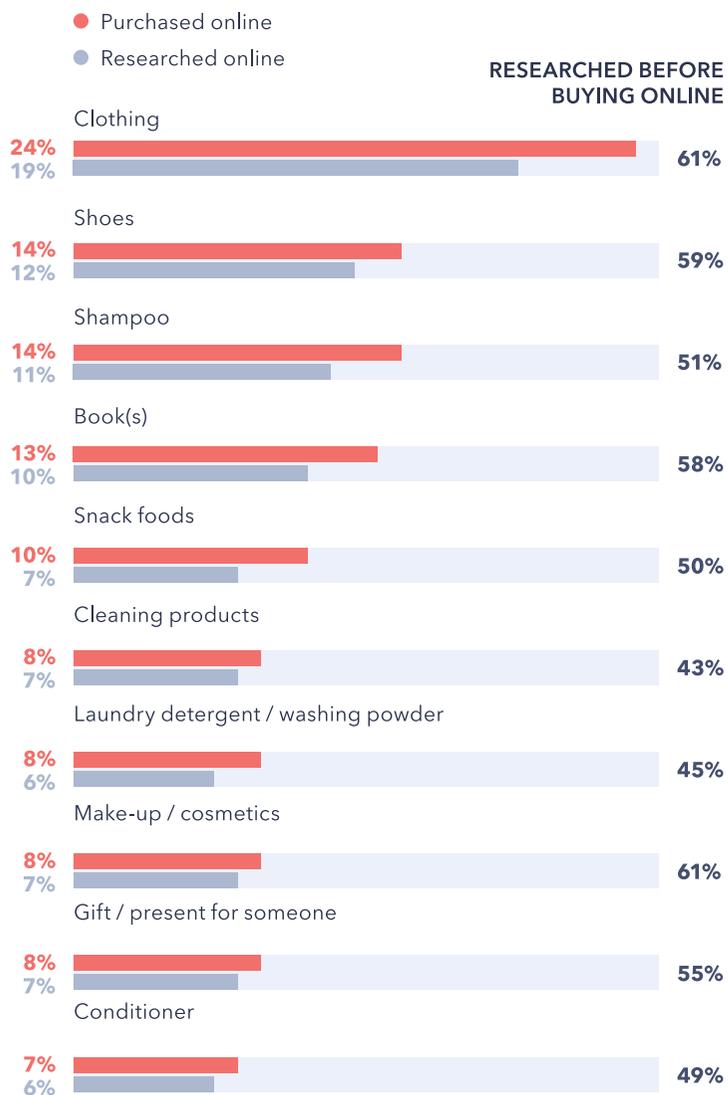
**Question:** Which of these products have you or your household purchased in the last 3-6 months? Which of these items did you purchase online? Which of these items did you research online before purchasing? Which of these items are you / your household thinking about purchasing in the next 3-6 months?

**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

## Purchasing Habits by Category

### Online Buying vs. Researching | Minor purchases

% of internet users who do the following for top 10 products in last month



Cheaper items like packaged foods, beauty products, and household supplies are bought online more than they are researched. **With less online research for these products, these categories may be best placed for voice commerce**, as they best fit as-and-when buying, responding promptly to consumer needs. Skin treatments and flu medicines, on the other hand, are researched at the same rate as they are bought - they are more complex products with somewhat higher stakes.

The big players in grocery retail are competing to take advantage of this new retail channel. By extending Amazon Prime to Whole Foods, and selling Echo devices in their stores, Amazon has shown their ambition to integrate online and offline platforms. Argos has followed up by **launching** voice shopping services on Google Home smart speaker. As of 2018, online and offline retail are still separate beasts, but the trend toward integration is progressing.



**Question:** Which of these products have you or your household purchased in the last month? Which of these items did you purchase online? Which of these items did you research online before purchasing??

**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

## Paid-For Digital Content

Despite fears that online piracy and file-sharing would destroy digital content landscape, the rate of internet users who've bought some form of digital content has actually been growing – from 53% in 2016 to 61% in 2018. There is strong regional variation, however – while 7 in 10 internet users in APAC have bought digital content in the past month, just 4 in 10 in Europe have.

Looking at the global picture, **we can see an ongoing trend whereby streaming is increasingly surpassing downloads.** More internet users are paying for access to content, such as YouTube movie rentals, than instant downloads.

47% of internet users say that they prefer to access music through streaming, compared to 25% who prefer to download and own it outright.

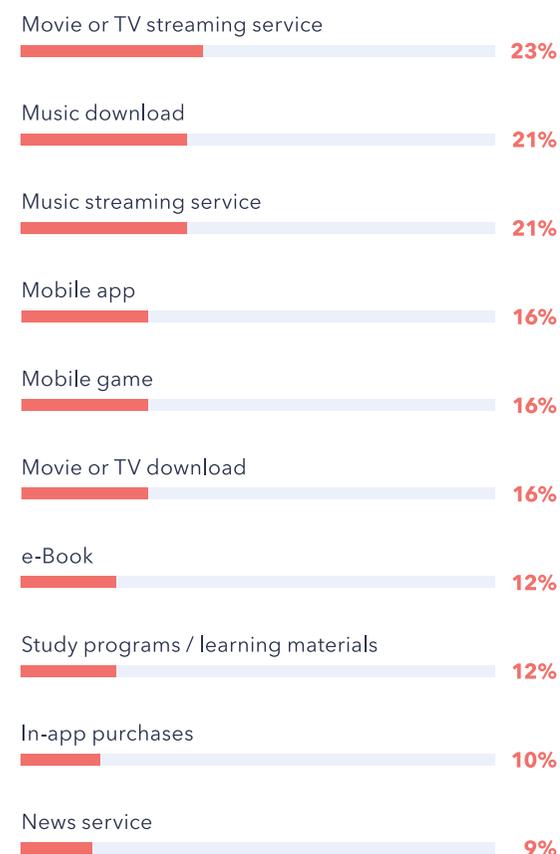
This transition has already happened for films and TV, and while music downloads were still ahead of music streaming in the first quarter of 2018, streaming has now caught up. We expect it to overtake music downloads soon, as constraints from mobile data plans and streaming speeds become less important.

But there's still a gap between internet users who use free streaming services and those who pay for them. Music and TV are seeing growth in the share of paying users, but there are other exceptions in this category worth highlighting. **Few people are paying for news services, and ebooks**, which were the most popular form of bought digital media four years ago. Since then, they have followed a downward trend in popularity, falling from 18% to 12% as of Q3 2018.

**42% of internet users would rather sign up for membership of a product / service than pay extra to own it**

Netflix and Spotify have led the transition to 'access-over-ownership' subscription models, commanding 36% and 21% of internet users for their services, respectively. Their example could herald disruption on sectors like the ride-hailing industry to the software or even the travel/hotel industry. For instance, **Uber** is about to launch a subscription service while a start-up travel business **BRB** is preparing to implement a Netflix-style subscription model for holiday packages.

### Subscription Models Emerge in Entertainment



**Question:** Which of the following types of online content have you paid for in the past month?

**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

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# The Purchase Journey

# The Purchase Journey

## Brand Discovery



**Affluent users are more likely to discover brands through search engines**

In this quarter, search engines beat TV ads as the most influential source of brand discovery for the first time. However, there are some differences when we look at consumers' income more closely.

**Ads seen on TV still ranks as the primary brand discovery source** for those in the bottom 25% income bracket. More affluent consumers have been more eager to explore new products through search engines, overall. While a full 48% of the online population has used an ad-blocker to stop ads being displayed in the past month, online ads are still cited as the third most widespread source of brand discovery, outstripping other sources for 31% of our respondents. App-based brand discovery, vlogs, and expert/influencer posts are widely discussed in the industry, but have so far only proved to be most effective among younger online consumers. 16-24-year-olds are 44% more likely to discover brands through vlogs.

As we describe in our **Social Media flagship report**, the way people use social media is changing. **Social behaviors are now less focused on sharing personal information and more purpose-driven**, which has allowed social media to come to the fore in the purchase journey. By now, social networks emerge as the second-most prominent channel for product research after search engines. This is the *research* phase, *after* they've discovered the brand. Digital word of mouth is outstripping search on its own in some of the most influential demographics.

## Product Research



**Question:** In which of the following ways are you most likely to find out about new brands, products, or services? // Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?  
**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

## Where Brands Meet Consumers

Social platforms also provide important brand-consumer touchpoints. 37% of internet users follow their favorite brands on social media, with 25% following brands they are thinking of buying something from.

15% of internet users say they want their favorite brands to make them feel cool or trendy, which helps explain why similar percentages are sharing branded content with their friends on social media or uploading their own content to a brand's page, showing that brand interactions are becoming more natural to those who are inherently interested in brands.

1 in 10 internet users interact with brands on messaging apps, showing the importance of convenience and immediacy in social brand-consumer relationships, and indicating the growing potential for chatbots.

Visiting branded websites remains much more popular than visiting a brand's social media page, though - even among younger demographics that are often assumed to be social media-first. Maintaining a strong social media presence is a prerequisite to reach consumers who follow and research brands on social media, but traditional content and SEO strategies are still more important in most cases.

Taken together, 4 in 10 internet users have either downloaded a branded app, played a branded game or scanned a brand's QR code in the past month. APAC has the highest share of consumers (45%), but 48% of 16-24-year-olds globally fall into that category of 'interacting consumers'.

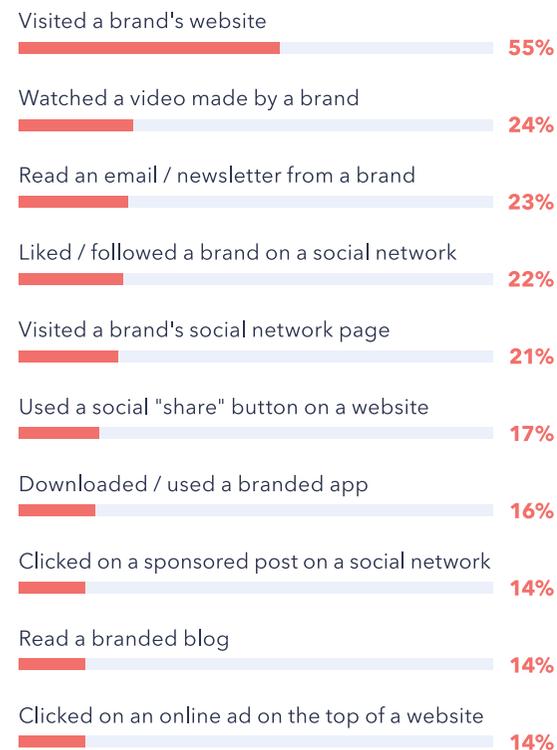
We discuss later how developments in AR (augmented reality) and location-based apps can facilitate New Retail, but those technologies can play a role in engaging consumers earlier in the path to purchase as well.

With all this in mind, **social commerce should be treated with caution** with a strategy that goes beyond implementing "buy" buttons on posts, and considering content's role earlier in the purchase journey.

Instagram, in particular, has been closely looking at how to incorporate **the purchase journey** within its platform, but **there are still old habits that will need to change before brands can complete the bridge between research and purchase on social media.**

At present, only 11% of internet users say that a social "buy" button would drive them to buy something online. **There's not yet a closed purchase journey loop in many social environments.** Facebook's event system, which integrates events suggestions

### Brand Interactions



(Discovery), descriptions (Research), ticket sales (Purchase) and sharing (Advocacy), are an exception - and these work well because of the inherently social nature of attending events and concerts. There is less of a natural social connection to buying ordinary goods and services via social media, which robust branded content and inspiration can change.



**Question:** Which of the following actions have you done online in the past month?  
**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

## Purchase Drivers & Reviews

So when consumers are on the path to purchase, what's needed to convert them into purchasers? Above all, **free delivery is the primary purchase driver**. Across all age breaks, and in every single country we track, internet users say that having free delivery would motivate them the most to buy a product online. **Internet users would much rather have a product delivered for free than on the next day.**

In general, most markets share the same pattern in priorities for online buying, where free delivery is followed by financial incentives like coupons, and then by peer endorsements.

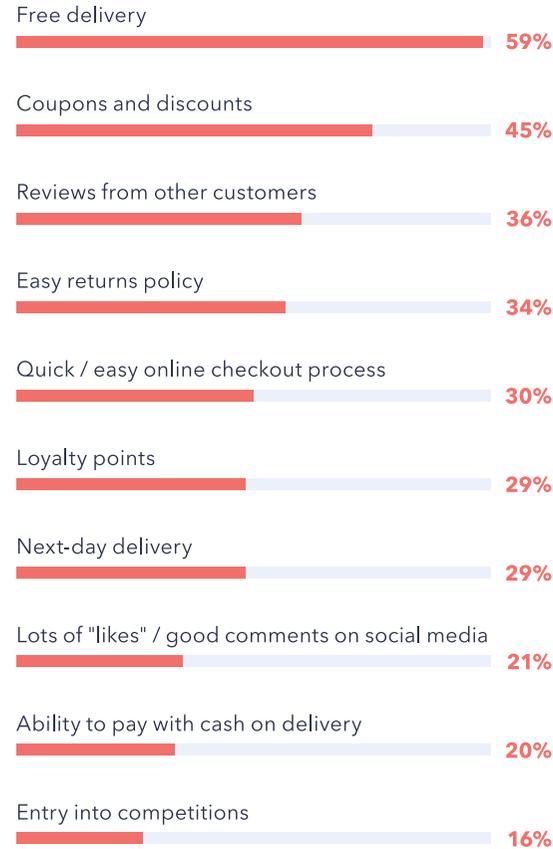
Easy returns are catching up with customer reviews, even supplanting them in MEA and North America. The lack of credit card infrastructure in MEA means that providing a cash on delivery option here ranks as the second most important feature (47%).

Globally, 45% of internet users post a review of a product or brand each month. The number of people *leaving* reviews outweighs those who use review sites in their product research (36%).

If you account for those who discover brands through review sites, **57% of the online population interact with reviews in some way during the purchase journey**. To encourage these reviews, financial incentives (43%) and appreciation for the products (48%) are paramount in encouraging advocacy. They carry significant weight across all of the major demographic and regional breaks.

But brands should appeal to other needs alongside these core endorsement motivations to target specific groups. Age is one of the most obvious dividing lines, with a person's life stage being a key indicator of what these "wants" may be.

### Purchase Drivers



**Internet users would rather have something delivered for free within a longer delivery window, than pay for next day delivery**



**Question:** When shopping online, which of these features would most increase your likelihood of buying a product?  
**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

## Purchase Drivers & Reviews

### Brand Advocacy



**1 in 5 16-24-year-olds want brands to make them feel cool/trendy, while 3 in 10 55-64-year-olds want to feel like a valued customer**

**Entertainment and social status are highlights in brand advocacy motivations of younger users.** Consumers aged 16-24 are much more likely to want their favorite brands to make them feel cool, connect them with other fans of the brand, and provide entertaining content.

55-64-year-old users, on the other hand, tend to value the more traditional factors of quality and customer service. Many consumers of this age place a premium on convenience when engaging with their favorite brands, and also display a conscientious mindset, wanting brands to use locally-sourced and eco-friendly materials in their products.



**Question:** What would most motivate you to promote your favorite brand online?

**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

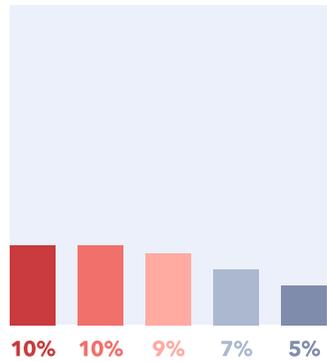
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# Trends in Ecommerce

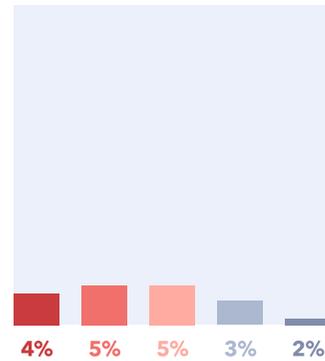
# Trends in Ecommerce

## Developments in Ecommerce: New Retail

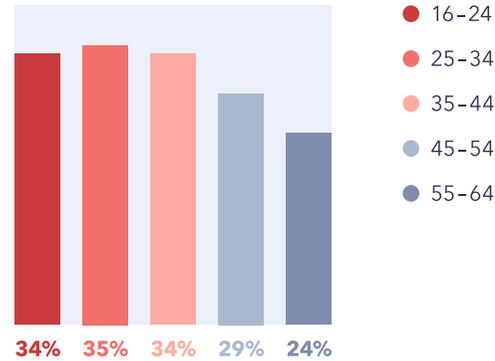
USE LOCATION SERVICE APPS



USE AR APPS



SCANNED A QR CODE



Jack Ma, CEO of Alibaba, coined the term “New Retail” to describe a commerce future where online, offline, data and logistics were integrated together, with the help of pioneering tech like location data and augmented reality (AR). **These technologies have the potential to not only revolutionize the buying experience but also offer retailers valuable consumer insight to help them tailor their services to individual needs.**

Some of these technologies have more traction than others. **Location-based services (such as Foursquare or Yelp) and AR are currently still niche phenomena.** This is partly because developer kits for AR are still emerging. With **Apple** and **Google** expected to release new immersive AR apps and experiences, we could expect the boost in available content to increase adoption, too. **There may also be a lack of consumer awareness that the handsets and apps they own will allow them to use AR.**

The QR code is part of the online fabric in South East Asia (the majority of internet users in Hong Kong and Taiwan use them), though it has had a surprising comeback worldwide, with more internet users scanning them now than did when they were at their seeming peak in 2014.

**1 in 5 internet users in the UK and 1 in 4 in the U. S. have scanned a QR code on their phone in the last month**

This is true in the West as well. Part of the reason for this is that while the technology has stayed the same, the identities are different, with QR codes forming a part of interactions on Snapchat, Facebook Messenger and Spotify, but under different names.



**Question:** Thinking about mobile / tablet apps, which of the following categories have you used in the past month? / Location-based services/ Augmented reality // Which of the following have you done on your mobile phone in the past month? / Used a QR code  
**Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

## Disruption via Voice Tech

### Developments in Ecommerce: Voice



Currently use a smart assistant



Planning to purchase a smart assistant



Use a voice search tool on their mobile

**Household and grocery shopping could be in line for the biggest disruption**

New Retail may be in its infancy around the world, but voice technology, considered one of the keystones of new technology, is becoming more widely adopted. 20% of internet users currently use a smart assistant, and a further 36% are planning to buy one, up from 15% and 34% last year (Q3 2017). As we describe in our [Voice report](#), there is a considerable user base for the technology on mobiles too, offering another path to unlock voice commerce.

Smart assistant users are no longer just **early adopters**, and fit a demographic of consumers who can bring it into their family shopping behavior. Their average user is aged 32, has children, and 65% of them have the main responsibility for food shopping.

As we saw earlier, *household products* are the category where online purchases most outstrip online research, which suggests that there could be consumer desire for the kind of quick, frictionless buying that voice commerce can excel at.

With the driving force of deep-pocketed companies like Amazon and Alibaba looking to penetrate the grocery market, and having their Echo and Genie hardware to draw upon, **it may be that staples own the biggest disruption in the near future.**

Privacy concerns could stand in the way of some of these developments, though. **Consumers are becoming increasingly aware of their digital footprints, and many may take issue with companies gaining access to sensitive personal information, such as a user's location in real-time, not to mention that many smart assistants have "active listening" enabled by default.**

With over half of internet users deleting cookies, 49% using private browsing windows and 48% using ad-blockers, companies have to deal sensitively with privacy-conscious users to develop and maintain trust on smart devices that use voice technology.



**Question:** Which of these products do you currently use at home? // 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 Q3 2018 **Base:** 113,932 Internet Users aged 16-64

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

## OUR RESEARCH

Each year, GlobalWebIndex interviews over 440,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers**. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia, and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

## OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender, and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age, and educational attainment) are represented by their responses.

## MOBILE SURVEY RESPONDENTS

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

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

## GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q3 2018 wave of research across 44 countries, which had a global sample size of 113,992 (with 93,803 surveys completed on PC/laptop/tablet and 20,129 surveys completed on mobile). The sample by market breaks down as follows:

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

## ACROSS GLOBALWEBINDEX'S MARKETS

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

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

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2018. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

## GLOBALWEBINDEX VERSUS ITU FIGURES

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

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

## Internet Penetration Rates

ITU Internet Penetration Metric 2018

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

**4c. NETFLIX USAGE**  
% of Internet Users aged 21-34 who have used Netflix in the last month across

Asia Pacific 21% Europe 36% Latin America 77% Middle East and Africa 26%

Netflix may be the name most widely associated with TV streaming, but its penetration in its content-rich home markets of LatAm (77%) and North America (82%) is far greater than any other region, with fewer than a quarter of European Millennials using it in the last month. **In North America, Netflix is some way ahead of Amazon Prime Video (38%) and Hulu (37%),** but within Europe, national services such as BBC iPlayer in the UK and MYTF1 in France offer stiffer competition, taking a 60% and a 44% audience share in their respective home markets. Local competition impacts in fast-growth regions as well; iQiyi (38%) is the leader in APAC's competitive streaming scene, and, in MEA, Shahid.net (32%) is top.

**Second-screening is a firmly mainstream activity,** with 78% of Millennials doing so via mobile, and 29% via a laptop. Millennials are most likely to be heading to social when they second-screen **with 47% using social networks and 48% messaging friends.** While second screening holds

potential as a source of **Millennial distraction.** Only 21% of Millennials are watching a TV show.

**While Millennials adopt new content, more linear content is still the preferred format.**

4c. Q1 2018 Global Millennials

44. Q1 2018 Global Millennials

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# Millennials

Examining the attitudes and digital behaviors of internet users aged 21-34

AUDIENCE REPORT 2018

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buying the following console brands

XBOX 360 7 Wii 6 XBOX ONE 5 Wii U 3 PS4 14 PS3 11 XBOX ONE S 15 PS4 PRO 12

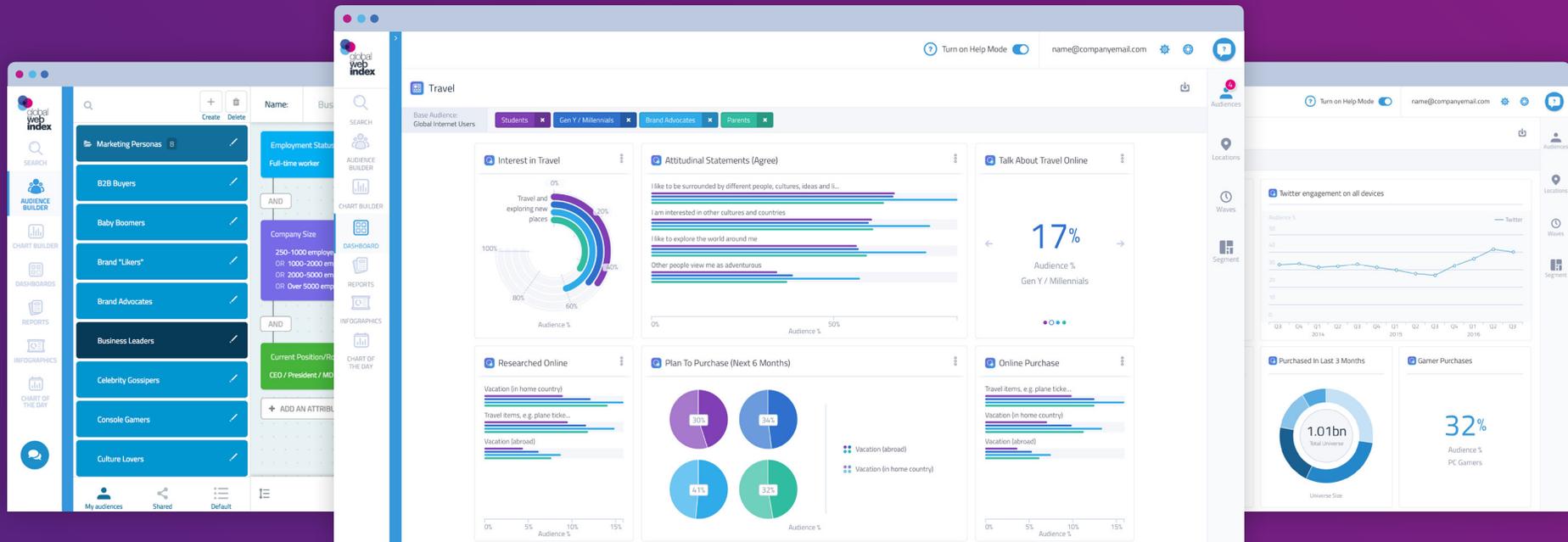
doing gaming-related activities in the last month

37%	1.17
26%	1.27
19%	1.30
19%	1.26
15%	1.25
14%	1.28
13%	1.28
11%	1.29

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