globalwebindex

Spain

Key digital behaviors and trends over time and across demographics

MARKET REPORT

www.globalwebindex.com

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Introduction

GlobalWebIndex Market Reports take an in-depth look at the profile and activities of digital consumers within each of the countries where GlobalWebIndex conducts research.

This report provides the very latest figures at a headline level as well as looking at trends over time and across demographics. It also examines in detail how this country compares to the global average across key digital measures and behaviors.

In this report, we explore:

- The demographics, interests and attitudes of digital consumers in this market.
- How internet users are engaging with various devices, as well as how important these devices are to their digital lives.
- What social platforms are most important in this country, and how users are engaging with social media.
- How internet users are interacting with advertising and brands, how marketers can most effectively engage these consumers and what makes them complete a purchase online.

UNDERSTANDING THIS REPORT

DISCOVER OUR DATA ON OUR PLATFORM

Each chart in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time and among custom audiences. You can find the corresponding question to each chart in the right hand column, starting from left to right. Moving down the list corresponds to the clockwise order of the charts.

Click to Explore Further

- GlobalWebIndex's full set of questions/data-points
- Our other reports and infographics
- Explanations of GlobalWebIndex's Segmentations or methodology

SOURCE, BASE AND INDEXES

Unless otherwise stated, all figures in this report are drawn from **GlobalWebIndex's Q4 2017 and Q1 2018 waves of online research among internet users aged 16-64.** It can be assumed that the **Source** for each chart is 'GlobalWebIndex Q4 2017 – Q1 2018' and the **Base** is 'Internet users aged 16-64'. Where data appears from previous years, it is an average across all waves conducted throughout that year. All **indexes** presented in this report are against the global average among internet users aged 16-64.

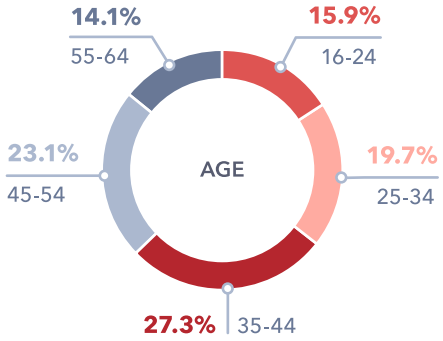
SPAIN

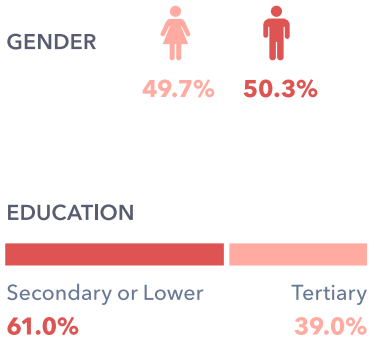
Internet Penetration*	**80.6%**
Sample for 2017**	**9,000**
Sample Q4 2017 – Q1 2018	**5,103**

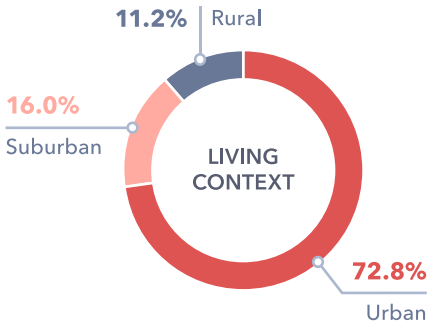
*GlobalWebIndex's forecasts for 2018 based on 2016 ITU data

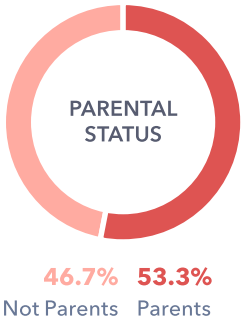
**GlobalWebIndex rounded sample sizes

Profiling Internet Users









LIFESTYLE SEGMENTATION

% who fall into the following segments*

	Regulars	Semi-Regulars	Occasionals	Non-Engagers
Donate to Charity	0.7%	7.7%	68.7%	22.8%
Drink Alcohol	19.3%	37.3%	34.3%	8.4%
Drive a Car	54.9%	19.0%	12.1%	14.0%
Eat Fast Food	16.7%	17.7%	55.4%	10.1%
Eat Out at a Restaurant	6.1%	41.1%	50.8%	2.0%
Exercise	65.1%	14.0%	11.9%	9.1%
Foreign Business Travel	5.6%	8.5%	13.3%	72.6%
Vacations in Home Country	23.9%	57.1%	12.6%	6.4%
Vacations Abroad	4.8%	37.5%	34.2%	23.5%
Use Public Transport	25.6%	20.9%	44.5%	9.1%

TOP 10 INTERESTS

% who say they are *strongly* interested in the following

	Percentage	Index
Film/movies	64%	1.27
Music	59%	1.14
Travel and exploring new places	54%	1.43
Food/restaurants/cooking	51%	1.18
Books/reading	50%	1.33
Television	49%	1.29
News/current affairs	49%	1.35
Health and fitness	47%	1.36
Personal healthcare	45%	1.37
Science and technology	43%	1.16

*For more information about how these segments are defined, please download this document

Demographic Profile

Lifestyle Segmentation

Here is a list of topics that may interest you. Can you please indicate which of these you are strongly interested in?

Spain vs Global Average

DEVICE

	SPAIN	GLOBAL
Most Important Device % who say the following are their most important devices for getting online		
43% 66%		
23% 16%		
30% 15%		
4% 3%		
Daily Time Spent Online on Mobile (HRS:MINS) (2017)	02:04	03:05

Device Ownership	SPAIN	GLOBAL
Smartphone	97%	95%
PC/Laptop	89%	73%
Tablet	57%	38%
Smart TV	41%	35%
Games console	45%	22%

Android vs iOS % using the following OS	SPAIN	GLOBAL
	80%	71%
	17%	27%

Mobile Voice Tech | % who have used a voice command tool on their mobile in the past month	SPAIN	GLOBAL
	16%	27%

Smartphone Purchase Timeframe % who plan to purchase/upgrade their existing mobile in the next 12 months	SPAIN	GLOBAL
	46%	59%

PRIVACY

	SPAIN	GLOBAL
Online Privacy Concerns % concerned about the internet eroding their personal privacy	70%	63%
Data Concerns % who worry about how companies are using their personal data	73%	63%

Privacy Safeguards | % who did the following last month	SPAIN	GLOBAL
Deleted cookies	47%	46%
Used a private browsing window	34%	44%
Used a desktop ad-blocker	37%	38%
Used a mobile ad-blocker	23%	33%
Used a VPN to access the web	17%	26%

Top Reasons for Using Ad-Blockers % of **ad-blocker users** who say the following are their main reasons for blocking ads	SPAIN	GLOBAL
I think there are too many ads on the internet	52%	49%
Too many ads are annoying or irrelevant	54%	48%
Ads are too intrusive	51%	44%

Spain vs Global Average

MEDIA CONSUMPTION

	SPAIN	GLOBAL
Cable/Satellite TV Subscription % who say they are paying for a subscription TV service	43%	57%
Online TV/Film Subscription % who paid for an online TV/film subscription service last month	18%	21%
Second-Screening % who use an additional device to get online while watching TV	83%	86%

Second-Screen Devices – Mobile vs. Laptop (2017)
% who use the following to dual-screen

	SPAIN	GLOBAL
Mobile	61%	72%
Laptop	37%	33%

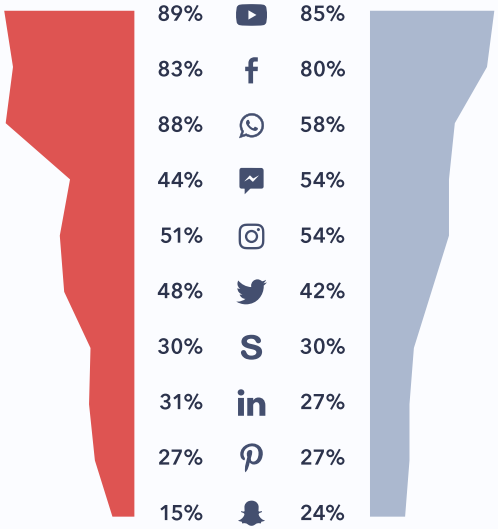
Top Second-Screen Activities | % who do the following while second-screening

	SPAIN	GLOBAL
Chat to/message friends	44%	43%
Use social media	44%	43%
Read my emails	42%	33%

SOCIAL

	SPAIN	GLOBAL
Daily Time Spent on Social Media | (HRS:MINS) (2017)	01:38	02:15
Average Number of Social Media Accounts	7.6	8.5
Following Brands on Social % who say they follow brands they like on social media	37%	37%

Top Global Social/Messaging Services
% who visited/used the following services last month



Spain vs Global Average

COMMERCE

Buying Products Online | % who purchased an item last month via the following

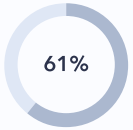
	SPAIN	GLOBAL
Any Device	72%	74%
PC/Laptop	57%	44%
Mobile	36%	53%
Tablet	9%	9%

Mobile Payments

% who used a mobile payments service in the last month

Digital Content

% who paid for some form of digital content last month



Top Online Purchase Drivers | % who say the following make them more likely to buy online

	SPAIN	GLOBAL
Free delivery	73%	60%
Coupons and discounts	53%	47%
Consumer reviews	32%	36%

BRAND ENGAGEMENT

Top Sources of Brand Discovery | % who say they typically hear about new products via the following

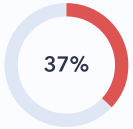
	SPAIN	GLOBAL
Search engines	39%	37%
Ad seen on TV	40%	36%
Word-of-mouth recommendation	38%	32%

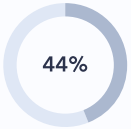
Top Online Research Channels | % who say they research brands/products via the following

	SPAIN	GLOBAL
Search engines	58%	51%
Social networks	37%	41%
Consumer reviews	31%	36%

Reviewers

% who reviewed a product online last month





Top Drivers of Brand Advocacy | % who say the following are reasons for them to promote a brand

	SPAIN	GLOBAL
High-quality products	44%	48%
Rewards (e.g. discounts, free gifts)	55%	44%
Relevant to my own interests	27%	33%

FOR MORE INSIGHTS, DOWNLOAD THE FOLLOWING CONTENT:

- Mothers
- Business Travelers
- Fitness Fanatics
- Fashionistas
- Millennials
- Sports Fans
- The Top 1%

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Income (By Segment)
- Income (By Household)
- Interest in Further Education
- Country Local Regions
- Household Living Arrangement
- Relationship Status
- Pregnancy (Selected Markets)
- Sexual Orientation (Selected Markets)
- Ethnicity (Selected Markets)
- Car Ownership
- Property Ownership
- Property Rental
- Type of Savings/Investments
- Value of Savings/Investments
- Employment Status
- Sector/Industry
- Current Position/Role
- Company Size
- Area of Responsibility
- Responsibility for Food Shopping
- Self-Perceptions
- Internet Usage Motivations
- Frequency of Travel
- Frequency of Physical Exercise
- Participation in Sports
- Sports Leagues/Competitions Followed
- Voting Intention (UK/US Only)

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 3,000 BRANDS, INCLUDING:

AIRLINES: American Airlines, Delta, United, Lufthansa

SPORTS BRANDS: Nike, adidas, Puma, Reebok

SPORTS TEAMS: FC Barcelona, New England Patriots, Manchester United, Los Angeles Lakers

BANKS: Citi, Barclays, HSBC, Bank of China

ALCOHOL: Heineken, Budweiser, Smirnoff, Johnnie Walker

Device Ownership and Usage

Across a range of metrics, smartphones are continuing to rise in importance. As well as being the most commonly-owned device in this market, they are also perceived to be internet users' most important internet access point. In addition, we're seeing more and more online behaviors migrate to smartphones, along with increases in the time spent online on them.

However, **we are not moving to a post-PC landscape yet.** Computers remain an important device, particularly in the realms of commerce and entertainment, and they continue to capture the biggest share of online time. Important to note here is that **multi-device usage is now the norm and mobiles are encouraging people to spend longer online,** rather than at the expense of their time on PCs/laptops.

While smartphones have risen to a position of importance in this country, **we are still waiting for the wearable revolution.** Ownership rates for smart wristbands and smartwatches remain low, and these devices are likely to remain a niche interest unless they can convince digital consumers that they possess functionality above and beyond those offered by smartphones.

Another device that has struggled over the past year is the tablet. **Although we saw explosive growth for tablet adoption in the early years of this decade, it's clear that a sense of fatigue has set in among tablet users.** Ownership rates have failed to reach the heights that many predicted they would and the growth in usage figures for these devices, that we have seen previously, has now peaked.

Looking at the habits of the youngest digital consumers gives us a clear indication of where device engagement trends in this market are moving. **By some margin, 16-24s identify smartphones as their most important device,** this group spends the longest time online each day on their mobiles and even though financial constraints clearly impact this demographic's spending power, it's a significant number who are planning to invest in a new smartphone within the next year.

The majority of the mid-to-premium-end smartphones in the market already have integrated voice assistants. As **it's these younger consumers with an interest in new handsets who are most likely to be using voice tech,** this may become a significant growth driver to mobile voice uptake. Helping to streamline how consumers carry out activities on their mobile, the spread of voice tech will have a major impact on everything from how people shop online, to how they search for entertainment content and communicate with their friends.

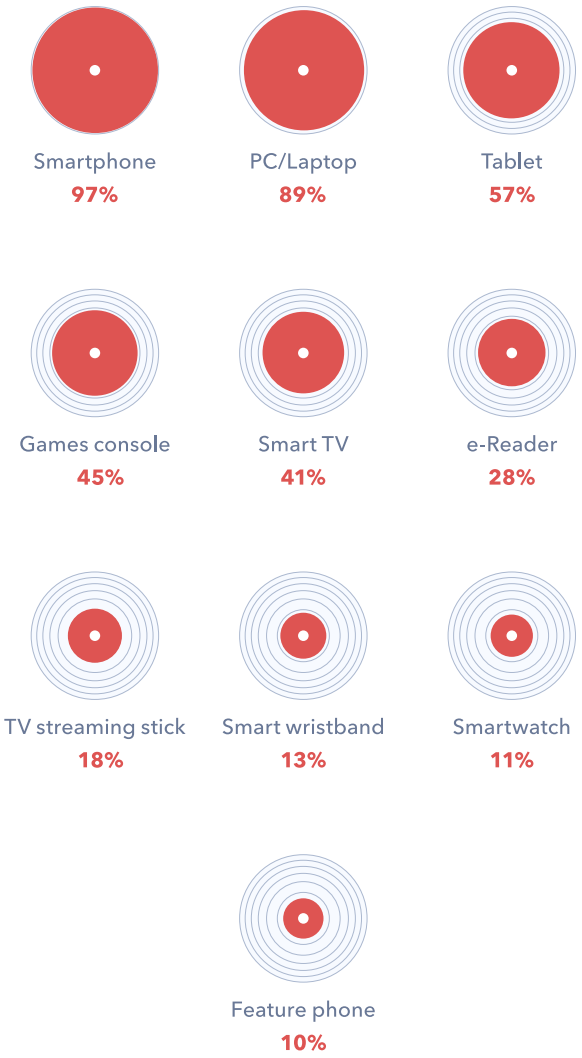
As smartphones, and online activities in general, become ever more important to digital consumers, it's clear that they are becoming more tech-savvy and more privacy-aware, and that many are deploying tools that control or improve their online experiences. Regularly deleting cookies and using **private browsing windows are now common activities in this market, while the ad-blocking trend has taken a firm hold**. Currently, it's younger internet users who are most likely to be using ad-blockers, with desktops the preferred device. However, it is a not insignificant number of older users who have taken to blocking ads and, although figures are currently lower than those seen for desktops, there is serious potential for ad-blocking on mobiles to become a mainstream activity in the future.

Although issues relating to privacy and practicality are important for ad-blocker users, **GlobalWebIndex's research shows that it is ad-frustration that is the key driver of ad-blocker adoption.** The proliferation of irresponsible and irrelevant online advertising has been key here and unless these issues can be addressed, and consumers can be convinced of the merits of the value exchange between free content and advertising exposure, we are sure to see ad-blocking rates increase in the future, across both desktop and mobile.

Device Ownership and Preferences

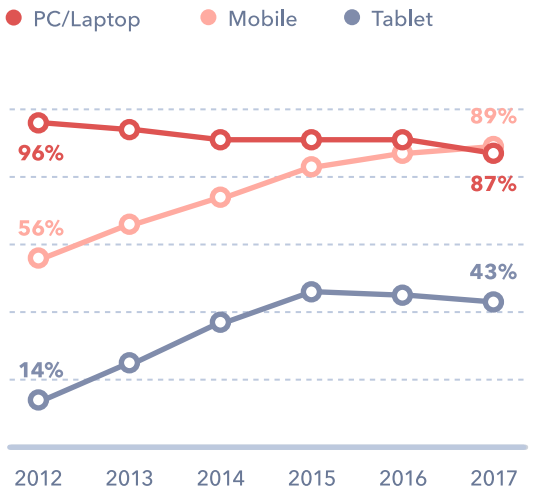
DEVICE OWNERSHIP

% who say they personally own the following



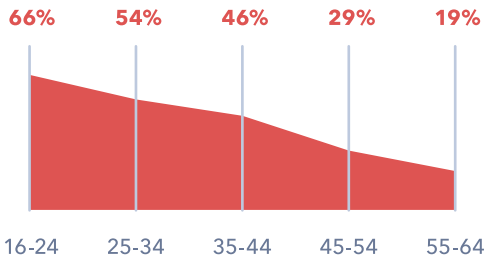
INTERNET ACCESS BY DEVICE

% who use the following devices to access the internet



SMARTPHONE IMPORTANCE

% who say their mobile is their most important device



RESPONDENTS SEE THE FOLLOWING DEFINITIONS AND ILLUSTRATIVE EXAMPLES

e-Reader: a digital reading device, e.g. Amazon Kindle, Kobo, Nook etc

Smart TV: a television that can connect to the internet

Smart wristband: a digital wristband which typically tracks your health and fitness levels. Popular examples include Nike Fuelband, Jawbone Up and Fitbit

Smartphone: an internet and app-enabled phone such as the iPhone, a BlackBerry or Android phones like the Galaxy S series

Smartwatch: a watch which allows you to connect to the internet and use apps. Popular smartwatches include Pebble, Sony Smartwatch, Samsung Galaxy Gear and the Apple Watch

Tablet device: e.g. an Apple iPad, Samsung Galaxy Tab, Microsoft Surface, Google Nexus tablet

TV streaming stick/device: a digital media device which streams web content to your TV set, e.g. Apple TV, Amazon Fire TV Stick, Google Chromecast, Roku Streaming Player

Which of the following devices do you personally own?

In the past month, which of these have you used to access the internet?

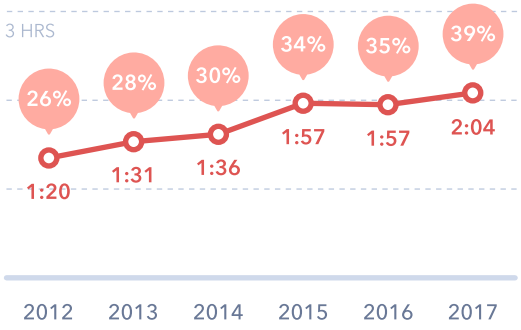
Which would you say is the most important device you use to access the internet, whether at home or elsewhere?

Time Spent Online and the Mobile Marketplace

TIME SPENT ONLINE VIA MOBILE

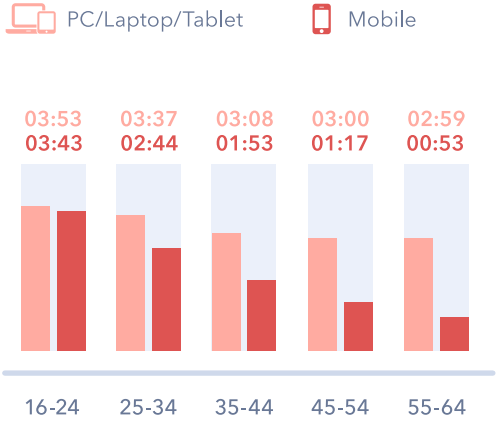
0% Percentage of online time per day typically spent online on mobile

0:00 hh:mm per day typically spent online on mobile



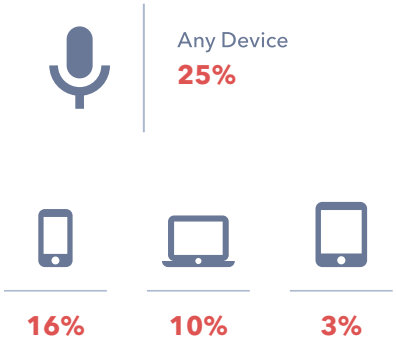
TIME SPENT ONLINE BY AGE

hh:mm per day typically spent online on...



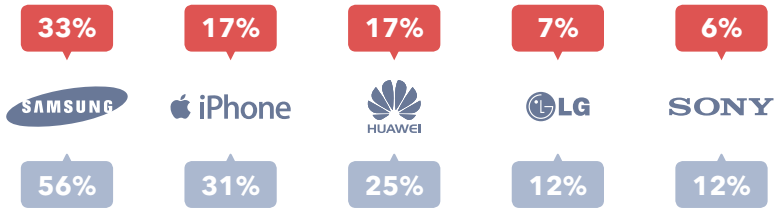
VOICE TECH ADOPTION

% who have used voice-command tools in the last month via the following devices



TOP 5 MOBILE HANDSET BRANDS

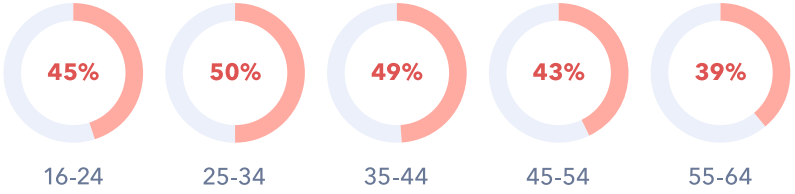
% who own/would purchase the following handsets



● Own ● Top choice(s) for next upgrade/purchase

MOBILE PURCHASE TIMEFRAME

% who say they plan to buy a new phone or upgrade their existing handset in the next 12 months



Roughly how many hours do you spend online on a mobile during a typical day?

Roughly how many hours do you spend online via a PC/ Laptop/Tablet?

In the past month, which of the following things have you done on the internet via any device? Used voice search or voice command tools (e.g. Siri, Cortana)

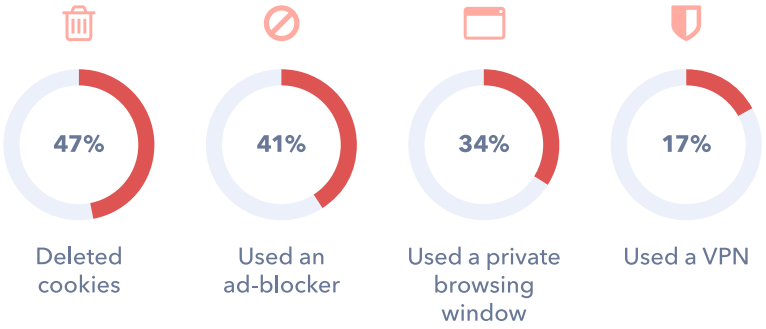
Which of the following mobile brands do you currently own? // Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone?

When do you plan to buy a new mobile phone or upgrade your existing phone?

Ad-Blocking and Privacy Tools

PRIVACY TOOLS

% of internet users who have done the following within the last month



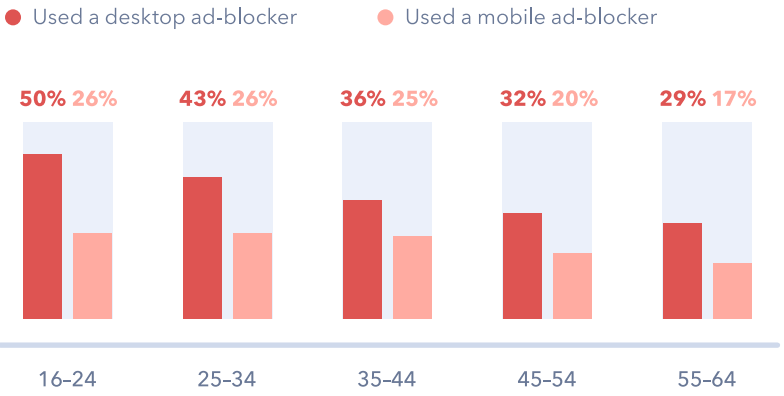
TOP 5 REASONS FOR USING VPNS AMONG VPN USERS

% of VPN users who cite the following as their main reasons

To keep my anonymity while browsing	33%
To access better entertainment content (e.g. TV shows/films/music)	30%
To access sites/files/services at work	28%
To access social networks, websites or news services	19%
To access restricted download/torrent sites	16%

AD-BLOCKING BY AGE

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



TOP 5 REASONS FOR USING AD-BLOCKERS AMONG AD-BLOCKER USERS

% of Ad-Blocker users who cite the following as their main reasons

Too many ads are annoying or irrelevant	54%
There are too many ads on the internet	52%
Ads are too intrusive	51%
Ads sometimes contain viruses or bugs	38%
To speed up page loading times	32%

Which of the following have you done in the last month? // On average, how frequently do you use an ad-blocker on the following?

Can you please tell us why you use VPNs or proxy servers when browsing the internet?

Please could you tell us your main reasons for blocking ads while you use the internet?

FOR MORE INSIGHTS, DOWNLOAD THE FOLLOWING CONTENT:

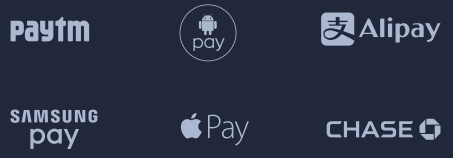
- Device
- Ad-Blocking
- Mobile Payments
- Profiling the Mobile-Only Audience
- VPN Usage Around the World
- Early Tech Adopters

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Device Sharing
- Device Satisfaction
- Console Brands
- PC/Laptop Operating Systems
- PC/Laptop Web Browsers
- Tablet Operating Systems
- Mobile Network Providers
- HTC Models
- Huawei Models
- iPhone Models
- LG Models
- Samsung Models
- Sony Models
- Mobile Actions in the Last Month
- Smartwatch Brands Owned (UK/US Only)

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 3,000 BRANDS, INCLUDING:

TECHNOLOGY BRANDS



MOBILE PAYMENTS

PAYMENT PROVIDERS

Media Consumption

Segmenting digital consumers by their engagement levels with a selection of media underlines the importance of social media within daily habits. Compared to cinema, broadcast radio, print press, online press and games consoles, **it's social networking which sees the strongest results for "heavy users"** within our segmentation, and by some distance. That only a small minority can be classified as "non-users" of social media gives another indication of how integral this activity has become within daily behaviors.

Online forms of TV now constitute a significant share of daily TV viewing time among internet users in this market. Despite their smaller screen sizes, the number of consumers now reaching for their mobiles when looking to engage with TV content is rising. Among the youngest internet users in this market, one of the areas where the smartphone has managed to really stamp its mark as a TV viewing device is for watching subscription services such as Netflix.

However, it should be noted that many of these media activities are not happening sequentially. Rather, the widespread nature of simultaneous media consumption and, in particular, the reality that the **vast majority of internet users go online while they watch television** mean that few media activities are happening in isolation.

Social activities form the core of digital consumers' second-screening habits, with using social media and messaging friends popular activities for TV viewers. And while it is true that some consumers are happy to interact with the online content of TV shows or engage in discussion of the TV shows they watch, the reality is that **most second-screen activities are a distraction from the content being watched on the main screen,** rather than a complement.

Gaming is also a key dual-screening activity, accentuating GlobalWebIndex's further research that shows that **the majority of internet users are regularly gaming in some way.** PCs and smartphones remain the most popular devices for gaming, while the lower figures we see here for using games consoles and tablets to game can be attributed to their relatively lower ownership rates. Among those who do use a games console, the PlayStation 3 and PlayStation 4 are the most popular machines, while the PS4 emerges as the most desired games console.

With the migration of gaming activities online, and the subsequent expansion of the gaming community, a whole host of behaviors now fall within the remit of 'gaming'. Among the specific gaming activities tracked by GlobalWebIndex, numerous 'non-traditional' gaming activities point towards the future of this medium.

Esports tournaments have been one of the most attention-grabbing of these gaming activities. Although esports engagement remains fairly low among the total online population in this market, if we rebase this among 16-24s then we see a slight rise in figures. We can expect to see the 16-24 engagement figures increase as esports leagues adopt franchised models inspired from the traditional sports world, helping to improve the accessibility and cohesiveness of this genre of entertainment.

Types of Media Consumed and Second-Screening

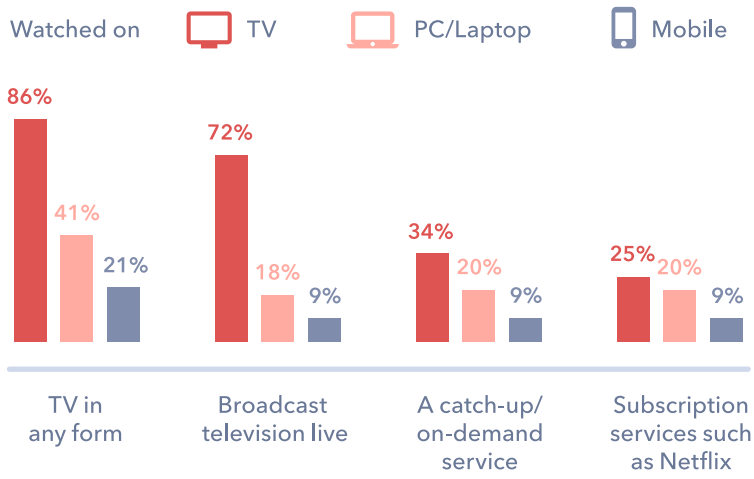
MEDIA CONSUMPTION SEGMENTATION

Engagement levels with the following forms of media*

	Non-Users	Light	Medium	High	Heavy Users
Cinema	6.7%	40.7%	29.7%	21.5%	1.3%
Broadcast Radio	15.4%	36.0%	21.1%	20.9%	6.6%
Physical Press	29.5%	49.1%	14.5%	5.9%	0.9%
Online Press	16.6%	41.2%	27.2%	11.2%	3.8%
Social Networks/Services	8.1%	26.0%	26.6%	15.9%	23.4%
Games Consoles	41.2%	31.3%	11.8%	10.7%	5.0%

TV BEHAVIORS BY DEVICE

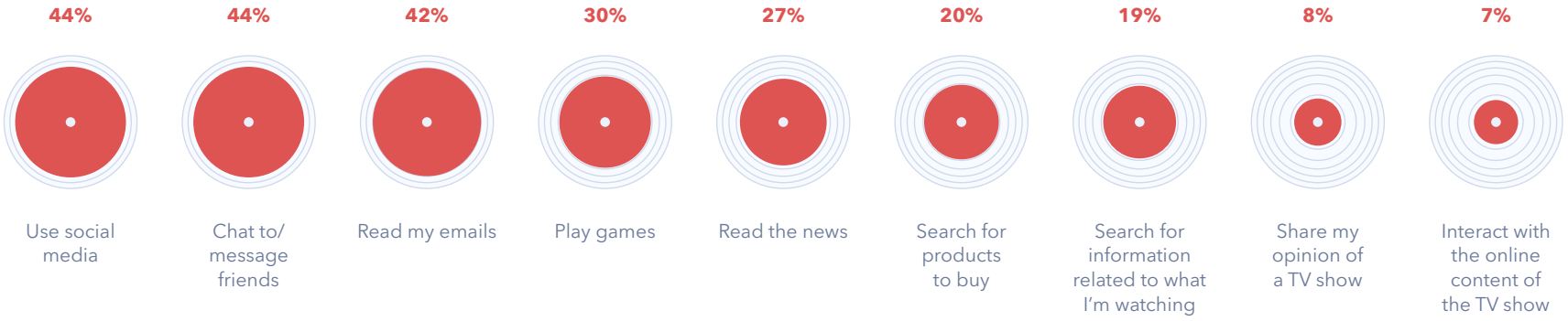
% who have watched the following in the last month



*For more information about how these segments are defined, please download this document

SECOND-SCREENING

% who are doing the following when second-screening



Roughly how many hours do you spend on/engaged with the following each day? (Except Cinema: On average, how often would you say you do the following things?)

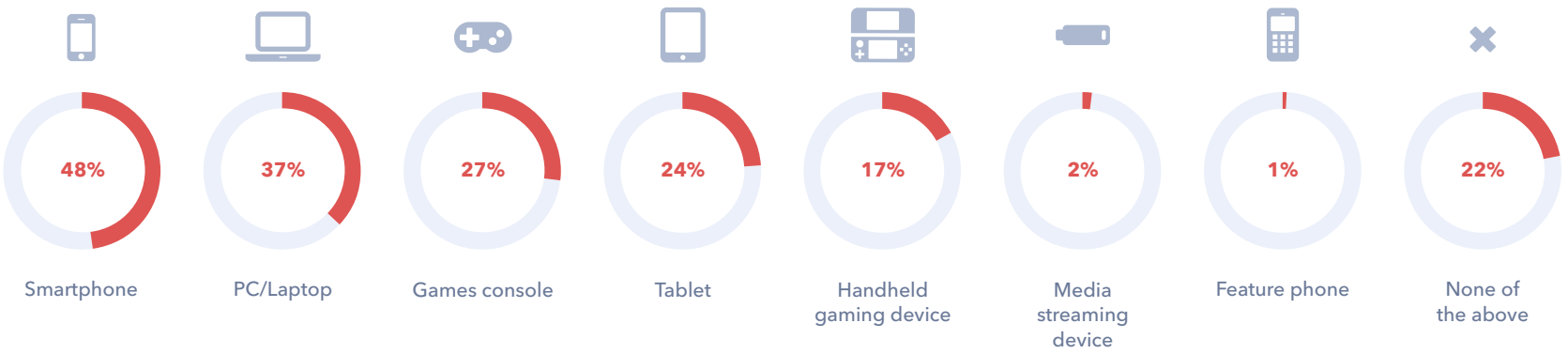
In the past month, which devices have you used to do the following? This includes any TV you watch in your home, office, while traveling or any other location.

When watching TV, which of these things do you often do on another device at the same time?

Gaming Devices and Activities

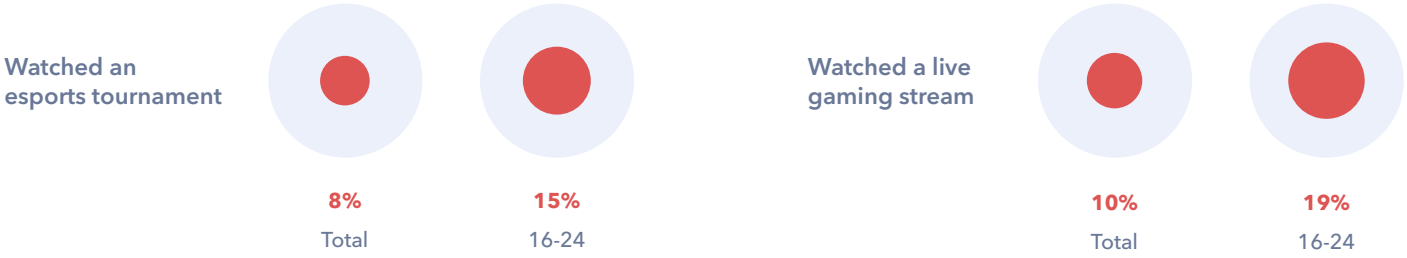
GAMING DEVICES

% who have used the following to play games



SPECTATOR GAMING ENGAGEMENT

% who have done the following in the last month



Which of these devices do you use to play games?

Which of the following gaming-related activities have you done in the last month?

FOR MORE INSIGHTS, DOWNLOAD THE FOLLOWING CONTENT:

- Entertainment
- Digital vs Traditional Media Consumption
- Netflix vs Amazon Prime Video
- Music Streaming Around the World
- Cinema Goers
- TV Buyers
- The World Cup Audience
- Online TV
- Sports Fans
- Social Video

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Online Activities
- Pay TV Subscriptions
- Content Services
- Digital Content Purchased

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 3,000 BRANDS, INCLUDING:

FILM FRANCHISES

GAMING FRANCHISES

Social Media Engagement

Being an internet user can be synonymous to being a social networker these days. Practically all digital consumers in this country have at least one social media account and have used social media in some form in the last month. Meanwhile, daily time spent on social media continues to rise. The ubiquity of social media usage and its continuing importance to the daily lives of digital consumers can be firmly attributed to the rise of the smartphone. **Mobiles are now the primary device for internet users in this market looking to access social media, having overtaken once-dominant PC/laptops.**

The increasing importance of the smartphone to social activities has also been one of the key drivers behind two important trends in the social space – **multi-networking and passive networking. Internet users are now comfortable maintaining a portfolio of social media accounts,** turning to each for particular activities and to engage with specific social groups, and the anytime-anywhere access that smartphones provide has made it simple to manage this array of social profiles.

However, it's also true that **on certain major networks, users' activities are becoming more passive in nature,** as engagement with these platforms becomes more frequent but less prolonged, and as social networkers become more selective about where they share their personal content. All that said, however, **on most of the major platforms, the majority of members are visiting/using on a monthly basis, ensuring that ads and content can be delivered and revenues generated.**

Within this context, **social video and social commerce present two significant opportunities for the industry.** As we will see later, social stands to become an even more important part of the online purchase journey and that **significant numbers say they are following brands they like on social media** emphasizes the opportunities that exist, provided the functionalities are implemented properly. In the realm of video, social could also play a key role, particularly as so much time is committed to social media each day and that **many social networkers identify entertainment as a key reason behind their social media usage.**

As in most markets, **Facebook remains in prime position within the social media industry.** The vast majority of digital consumers are using at least one of Facebook's platforms, with usage of Facebook itself continuing to be almost universal. **The one platform that can truly challenge the reach of Facebook is YouTube,** which is also notable for drawing in more visitors/users than it has members (a result of many visitors to the site not feeling the need to sign up for an account). Nevertheless, it's important to keep in mind that, along with WhatsApp, Facebook typically scores the best numbers for "more than once a day" when we ask people how frequently they visit various social platforms.

Notably, **Snapchat might post a relatively modest visitor figure among the total online population (15%), but its popularity among younger demographics is considerable.** Look just at Gen Z (defined here as 16-20s) and usage rates jump to 41%.

Social Media Engagement and Behaviors

SOCIAL MEDIA BEHAVIORS

7.6 **Average number of social media accounts**

98% have at least one social media account

99% have visited/used a social network in the last month

83% have engaged with/ contributed to at least one social network within the past month

Daily time spent social networking and messaging

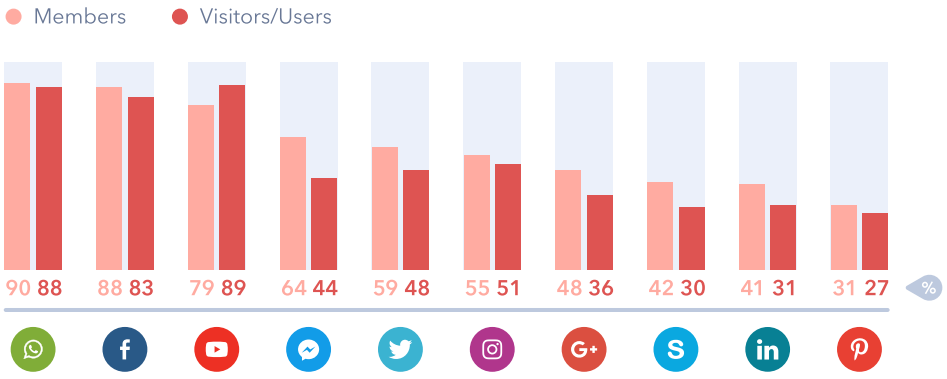
MOTIVATIONS FOR USING SOCIAL MEDIA

% who use social media for the following reasons

		Index
47%	To stay up-to-date with news and current events	1.18
46%	To fill up spare time	1.19
36%	General networking with other people	1.09
36%	To stay in touch with what my friends are doing	0.88
35%	To find funny or entertaining content	0.96

TOP 10 SOCIAL PLATFORMS

% who fall into the following groups*



TYPES OF PEOPLE/ORGANIZATIONS "FOLLOWED" ON SOCIAL MEDIA

% who say they "follow" these types of people/organizations

		Index
37%	Brands you like	0.99
34%	Singers, musicians or bands	1.11
25%	News/media organizations	0.83
22%	Actors	0.71
22%	Brands you are thinking of buying something from	0.86

Note: Average number of accounts is calculated based on analysis of 44 named networks + "Other". Of the 44 individual platforms, 23 are global and 21 are specific to certain countries or regions

***Definitions:**
Members – People who say they have an account on the platform in question.
Visitors/Users – People who say that, within the last month, they have visited or used a social network's website or app via any device.

Roughly how many hours do you spend engaging with/ connected to social networks or services during a typical day?

What are your main reasons for using social networking services?

On which of the following services do you have an account? // Which of the following sites/applications have you visited/used in the past month via your PC/ Laptop, Mobile or Tablet? // And which of the following services have you actively engaged with or contributed to in the last month?

Who do you follow on social media?

FOR MORE INSIGHTS, DOWNLOAD THE FOLLOWING CONTENT:

- Social
- Brand Followers
- Social Media Engagement
- Social Media Motivations
- The Social Media Landscape
- Social Video

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Usage Frequency
- Social Media Segmentation
- Facebook Actions
- Facebook Messenger Actions
- Instagram Actions
- Snapchat Actions
- Twitter Actions
- WeChat Actions
- WhatsApp Actions
- YouTube Actions
- App Types Used
- Named Apps Used

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 3,000 BRANDS, INCLUDING:

AUTOMOTIVE

FAST FOOD

DRINKS

The Online Purchase Journey

At the very start of the purchase journey, **when consumers are discovering new products or services, it's important to note that more 'traditional' channels still have an important role to play.** TV advertisements and search engines post high figures here, while peer-to-peer recommendations are also influential. **That said, the importance of digital is plain to see** – it's now 31% of digital consumers who say they find new brands from ads they see online. As might be expected, digital channels are most impactful on younger consumers (who tend to spend the longest time online) while more established platforms have a stronger appeal to older consumers.

It's at the next phase of the purchase journey – the research phase – where newer digital forms really make their mark. In particular, when consumers are aware of a brand/product and are looking for more information, it's now 37% who say they turn to social media. This is a key factor underpinning the potential of social commerce, as discussed above, and considering younger consumers are the most likely to be using social for product research, it may not be long before we see social overtake search as the most important portal for consumers looking to research products online.

Online commerce has become a mainstream activity; 72% of online adults say that they've recently bought a product on the internet. **Currently, PCs and laptops remain integral to this process;** as our data shows, almost everyone who is purchasing online is making at least *some* of their transactions on these devices. **Although mobiles have overtaken computers for many online activities, when it comes to completing a purchase online, digital consumers are still most likely to turn to a PC or laptop.** Highly relevant here is that PCs and laptops are still perceived by many to offer the best functionality and security when it comes to purchasing.

When it comes to what influences an online shopper to complete a purchase, **the availability of free delivery is by far the most important factor** (as it is across all of GlobalWebIndex's tracked markets). The importance of offering free delivery to shoppers cannot be over-stated, particularly as this is a purchase driver that is of paramount importance across all the major demographic breaks. Optimizing the customer experience while shopping also emerges as a key factor for consumers, with a quick and easy checkout process falling within the top 5 purchase drivers. Meanwhile, compared to the global average, consumers in this market over-index the most for valuing next-day delivery.

After purchase, **it's 37% of internet users who are regularly posting online reviews.** Considering online reviews are an important purchase driver and word-of-mouth recommendations remain key brand discovery routes for consumers, the importance of gaining brand advocates is clear. It's high-quality products and rewards (such as discounts and gifts) that emerge as the two most important motivators of online brand advocacy, and internet users here are most ahead of the global average for being influenced by rewards.

From Discovery to Purchase

TOP 5 CHANNELS FOR BRAND/PRODUCT DISCOVERY

% who say they discover brands/products via the following sources

		Index
40%	Ad seen on TV	1.10
39%	Search engines	1.08
38%	Word-of-mouth recommendation	1.19
31%	Ad seen online	1.00
27%	Brand/product websites	1.05

TOP 5 BRAND/PRODUCT RESEARCH CHANNELS

% who say they use the following when looking for more information about a brand/product

		Index
58%	Search engines	1.15
37%	Social networks	0.90
34%	Product/brand sites	1.09
31%	Consumer reviews	0.86
24%	Price comparison websites	0.90

TOP 5 PURCHASE DRIVERS

% who say the following would make them more likely to purchase a product online

		Index
73%	Free delivery	1.21
53%	Coupons and discounts	1.14
41%	Next-day delivery	1.39
40%	Easy returns policy	1.17
39%	Quick/easy online checkout	1.32

ONLINE PURCHASING

% who have bought a product online in the last month via...

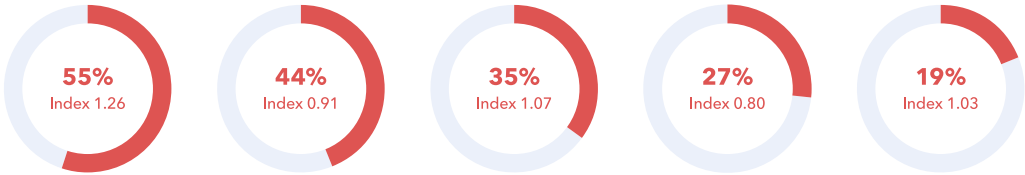
Any Device
72%

57% **36%** **9%**

ONLINE REVIEWING & TOP 5 REASONS FOR BRAND ADVOCACY

% who say they would advocate a brand online for the following reasons

37% **have posted a review in the past month**



Rewards (e.g. discounts, free gifts, etc)

High-quality products

When I've received great customer service

When something is relevant to my own interests

Having insider knowledge about the brand or its products

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?

When shopping online, which of the following things would increase your likelihood of buying a product?

In the past month, which of the following things have you done on the internet via any device? Purchased a product online

In the past month, which of the following things have you done on the internet via any device? Posted a review of a product, service or company // What would most motivate you to promote your favorite brand online?

FOR MORE INSIGHTS, DOWNLOAD THE FOLLOWING CONTENT:

- Commerce
- Affluent Consumers
- Beer Drinkers
- Wine Buyers
- Brand Followers
- Online Banking in Europe
- Online Purchase Journey Across the Generations
- TV Buyers
- Business Travelers
- Car Buyers
- Eco-Consumers
- Early Tech Adopters

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Online Purchasing (by Category)
- Online Research (by Category)
- Digital Content Purchased
- Mobile Payment Services
- Products/Topics Talked About Online
- Brand Role in Consumer's Life
- Online Brand Interactions in Last Month
- B2B Marketing Influencers

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 3,000 BRANDS, INCLUDING:

HAIRCARE/SKINCARE/COSMETICS

LUXURY FASHION

RETAILERS

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 400,000 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 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.

MOBILE SURVEY RESPONDENTS

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

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

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2017 and Q1 2018 waves of research with a global sample size of 207,096 (with 170,288 surveys completed on PC/laptop/tablet and 36,808 surveys completed on mobile).

	in 2017*	Q4 2017 Q1 2018
Argentina	6,000	3,171
Australia**	5,000	3,552
Austria	5,000	2,611
Belgium	5,000	2,561
Brazil	9,000	4,580
Canada	9,000	4,728
China**	32,000	28,758
Egypt**	5,000	3,049
France**	9,000	5,589
Germany**	9,000	5,168
Hong Kong**	5,000	3,040
India**	12,000	7,153
Indonesia	7,000	3,542

	in 2017*	Q4 2017 Q1 2018
Ireland	5,000	2,566
Italy**	9,000	5,087
Japan**	7,000	3,542
Malaysia	6,000	3,069
Mexico**	6,000	4,162
Netherlands	5,000	2,571
New Zealand	5,000	2,554
Philippines	6,000	3,069
Poland**	5,000	3,088
Portugal	5,000	2,580
Russia	9,000	4,605
Saudi Arabia	5,000	2,507
Singapore**	6,000	4,036

	in 2017*	Q4 2017 Q1 2018
South Africa	6,000	3,068
South Korea	5,000	2,531
Spain**	9,000	5,103
Sweden	5,000	2,603
Switzerland	5,000	2,524
Taiwan**	5,000	3,073
Thailand	6,000	3,151
Turkey	6,000	3,326
UAE**	5,000	3,066
UK	31,000	15,625
USA	63,000	31,959
Vietnam	6,000	3,130

*Please note these sample sizes have been rounded
**Please note that due to investments in sample sizes between Q1 2017-Q1 2018, respondent counts have increased in these markets

Notes on Methodology: Internet Penetration Rates

ACROSS GLOBALWEBINDEX'S MARKETS

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

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

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 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

GlobalWebIndex's forecasts for 2018 based on 2016 ITU data

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	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%

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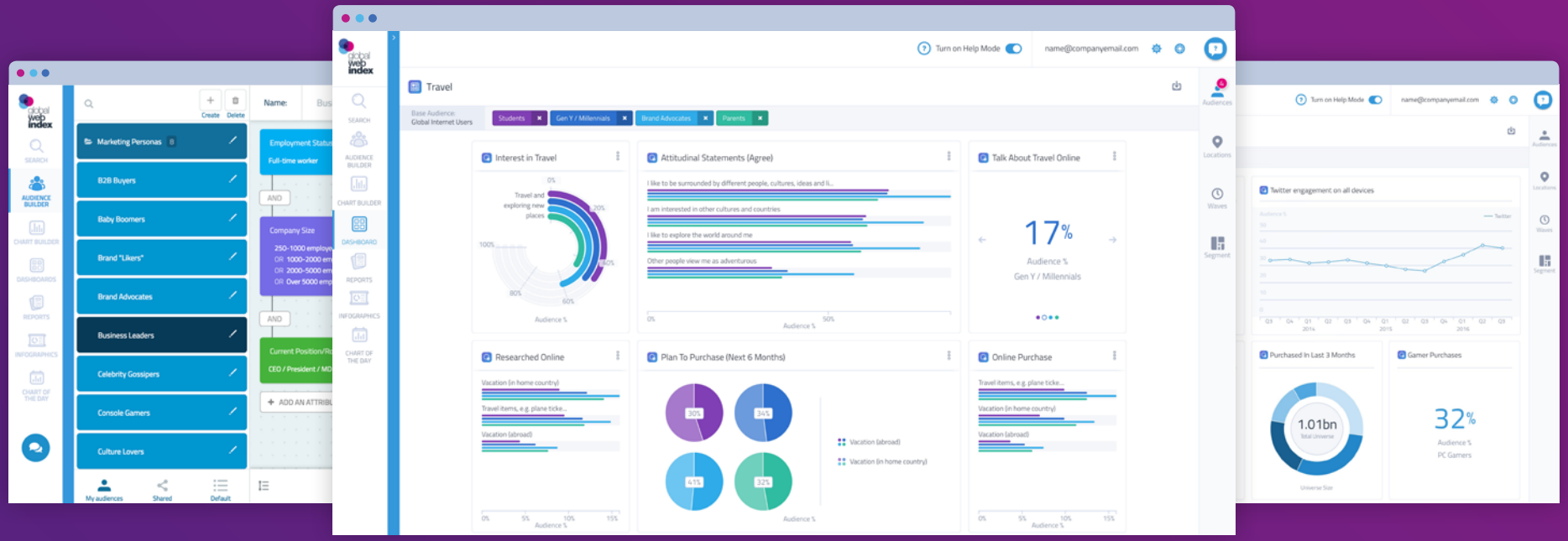

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