globalwebindex

GWI

COMMERCE

SUMMARY

GlobalWebIndex's bi-annual report on the latest trends in online commerce

Q1 2016

Introduction

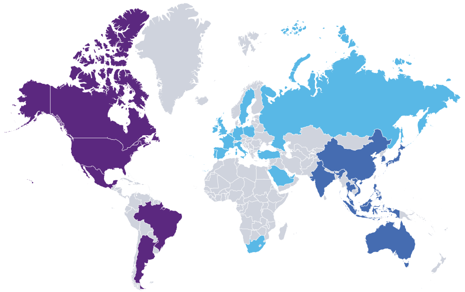
GWI Commerce presents GlobalWebIndex's very latest figures for online commerce behaviors and engagement levels across 34 markets.

Drawing on data from our most recent wave of research, we offer insights on:

- The countries and demographics that are driving online commerce
- The role that PCs, laptops, mobiles and tablets are playing in online purchasing
- The potential and current impact of social commerce
- Purchasing behaviors in specific categories
- How and why online purchases are being completed

Notes on Methodology

Each year, GWI interviews more than 200,000 internet users across 34 markets – making it the largest on-going study into the digital consumer instigated to date.



AMERICAS: Argentina ▪ Brazil ▪ Canada ▪ Mexico ▪ USA

EMEA: Belgium ▪ France ▪ Germany ▪ Ireland ▪ Italy ▪ Netherlands ▪ Poland ▪ Portugal ▪ Russia ▪ Saudi Arabia ▪ South Africa ▪ Spain ▪ Sweden ▪ Turkey ▪ UAE ▪ UK

APAC: Australia ▪ China ▪ Hong Kong ▪ India ▪ Indonesia ▪ Japan ▪ Malaysia ▪ Philippines ▪ Singapore ▪ South Korea ▪ Taiwan ▪ Thailand ▪ Vietnam

Research is conducted in quarterly waves, each of which has a global sample size of around 50,000 internet users. Typically, we interview between 3,000 and 8,000 people per year per market, with larger sample sizes in key countries such as the UK and the US (30,000 each). In this particular report, we draw primarily on our Q4 2015 wave of research among 51,080 adults.

Respondents complete an online questionnaire that uses stratified sampling techniques to ensure that they are representative of the internet population aged 16 to 64 in each country (with correct proportions in terms of gender, age and educational attainment).

Pro Platform™

All of the questions and data-points featured in this report are available to explore on PRO Platform. They can be analyzed by any audience, date range or selection of countries/regions, with users able to build bespoke audiences based on our wide range of demographic, attitudinal and behavioral variables.

Explore this data in PRO Platform
/// Click here: Social Media > Social Platforms > Active Usage

Each chart in this report is accompanied by a hyperlink which will take you to the appropriate section on PRO Platform; simply click on the relevant link to start exploring the data further

Reports

FLAGSHIP REPORTS

Our flagship reports look at key global trends within the digital consumer landscape – presenting the latest insights and statistics on social platforms, device usage, online purchasing, brand engagement and entertainment. Available **here** are:

QUARTERLY

- Social
- Device

BIANNUAL

- Brand
- Commerce
- Entertainment

MARKET/REGION REPORTS

GWI's Market Reports track key digital behaviors and engagement rates in each of the 34 countries we survey, providing the very latest figures at a headline level as well as looking at trends over time and across demographics.

REGIONS

- APAC
- Europe
- Latin America
- North America

MARKETS

- Argentina
- Australia
- Belgium
- Brazil
- Canada
- China
- France
- Germany
- Hong Kong
- India
- Indonesia
- Ireland
- Italy
- Japan
- Malaysia
- Mexico
- Netherlands
- Philippines
- Poland
- Portugal
- Russia
- Saudi Arabia
- Singapore
- South Africa
- South Korea
- Spain
- Sweden
- Taiwan
- Thailand
- Turkey
- UAE
- UK
- USA
- Vietnam

AUDIENCE REPORTS

In-depth examinations of particular groups, assessing their most important behaviors and motivations as well as what sets them apart from the wider online population.

Recent audience reports include:

- Baby Boomers
- Brand Advocates
- Brand Followers
- Business Travelers
- Celeb Fans
- Console Gamers
- Gen X
- Instagrammers
- Millennials
- Mothers
- Premier League Fans
- Shazam Users
- Snapchat Users
- Students
- Tech Influencers
- Teens
- The Top 1%
- Vlog Watchers

To explore the full range of reports – including Insight Reports, Trends and Profile reports – click **here**

Topline Trends and Demographics

Which internet users are shopping online and what stores are they visiting?

- Online shopping is a truly mainstream digital activity – each month, 8 in 10 digital consumers buy a product online and we see high engagement rates across all the major demographic breaks.

- Outside China, Amazon can claim that half of internet users visit its sites at least once a month, rising to 3 in 4 in Germany and the UK. Globally, Amazon has more visitors than eBay, though eBay has a clear lead in markets such as Australia and Russia.

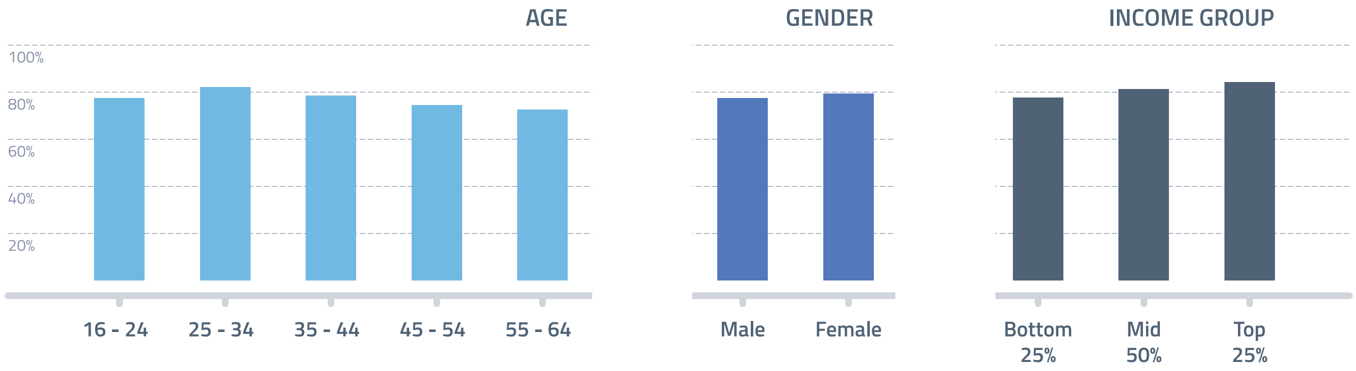
- In China, Alibaba is dominant. 8 in 10 are regularly visiting Taobao and about 60% visit Tmall monthly. However, Alibaba's presence outside Asia remains small – only 5% in the US are visiting Aliexpress.com.

- Chinese digital consumers are the most enthusiastic online shoppers, with Indians and Indonesians also being highly engaged. Nevertheless, we see strong figures across almost all markets – over 80% shop online in Germany and the UK, as do 3 in 4 in the USA.

- Online shoppers have deep concerns over online privacy and are acting on these worries. Each month, about 40% delete cookies and a fifth are using anti-tracking software, providing a serious barrier to personalized shopping experiences. What's more, 41% of regular online shoppers are now using ad-blocking software.

THE DEMOGRAPHICS OF ONLINE SHOPPING

% of internet users who purchased a product online last month



Question: In the past month, which of the following things have you done on the internet on your PC/Laptop, Mobile or Tablet? /// **Source:** GlobalWebIndex Q4 2015 /// **Base:** Internet Users aged 16-64

Explore this data in PRO Platform /// Click here: **Online Activities and Behaviors > Online Activities in Last Month > Activities via Any Device**

Engagement by Device

What devices and apps are online shoppers using?

▪ PCs/laptops remain integral to the purchase journeys of digital consumers. Almost all online shoppers are using a PC/laptop to buy online at least some of the time.

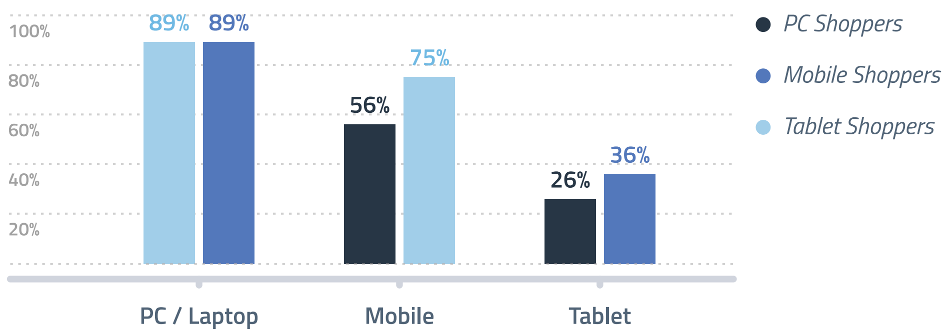
▪ Nevertheless, m-commerce continues its ascent in importance – half are now using a mobile to shop online each month, rising to 6 in 10 internet users in APAC. What's more, no single device fully dominates the online shopping experience of internet users. Instead, online shoppers take a multi-device approach, with internet users shopping via an average of 1.78 devices.

▪ A third of online adults are now using shopping apps, up from 22% in mid-2014. The Amazon app performs particularly well – 1 in 3 online adults in the UK and 3 in 10 in the USA are monthly users. Meanwhile, half of online Indians use the Flipkart app and in China 6 in 10 are Taobao app users.

▪ In the UK/US, 1 in 3 Apple device owners who have access to Apple Pay have used the service. What's more, another third say they are interested in doing so in the future.

CROSS-DEVICE PURCHASING

% who purchased a product online last month via these devices



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Social Commerce

What is the potential for online commerce via social networks?

- Social networks have become key channels for product research – last month, one fifth of Facebookers used the network to research a brand or product.

- With about a third of social networkers saying they are following a brand they are considering purchasing from, there is a clear opportunity for brands to engage a substantial number of their potential customers using social media.

- Around 80% of social networkers are purchasing products online each month. However, only 1 in 10 digital consumers say a 'buy' button would influence them to make a purchase via a social network. Much needs to be done to educate networkers about the opportunity of social commerce.

THE POTENTIAL OF SOCIAL COMMERCE

% who purchased a product online last month

Snapchatters	85%
Reddit Active Users	83%
Pinterest Active Users	83%
LinkedIn Active Users	82%
Tumblr Active Users	81%
Instagram Active Users	81%
Twitter Active Users	81%
YouTube Active Users	79%
Facebook Active Users	78%

Question: In the past month, which of the following activities have you done online on your PC/Laptop, Mobile or Tablet? Purchased a product online /// **Source:** GlobalWebIndex Q4 2015 /// **Base:** Active Users of these platforms aged 16-64

Explore this data in PRO Platform /// Click here: **Online Activities and Behaviors > Online Activities in Last Month > Activities via Any Device**

Category Trends

What product types are the most purchased and researched online?

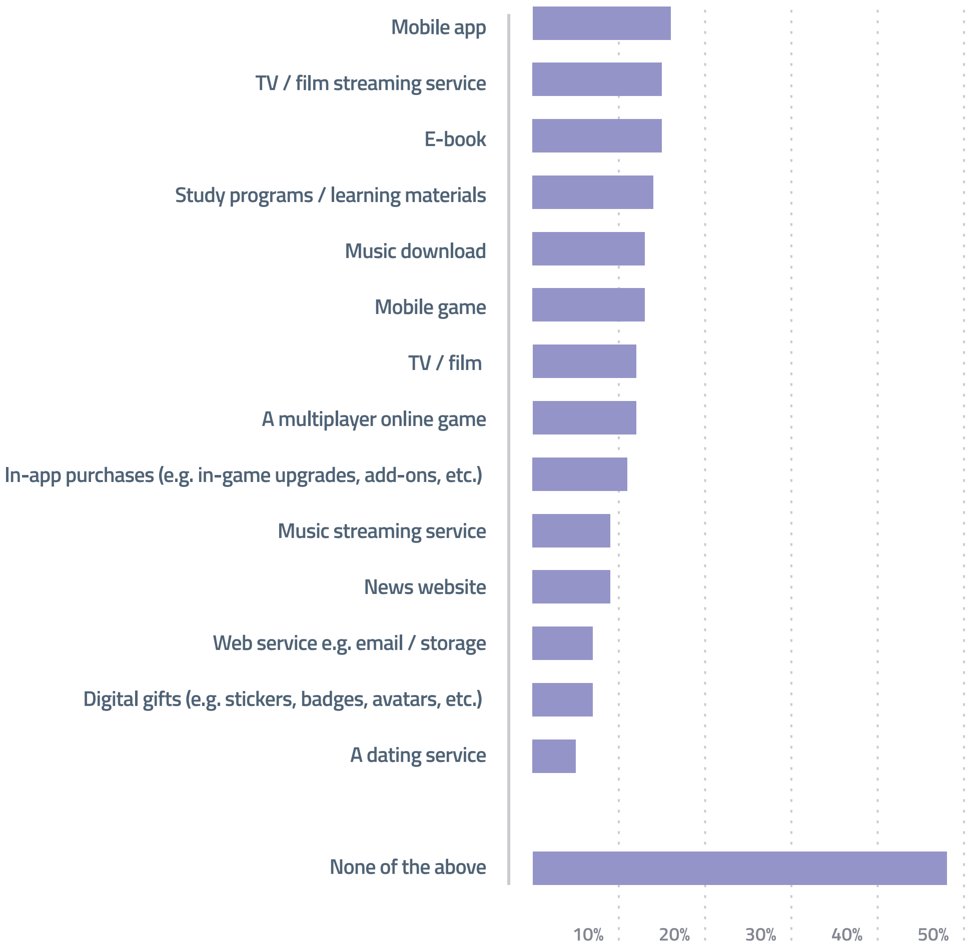
- Clothes and shoes are the most popular online purchases, while mobiles remain the most purchased tech product. Significant numbers are also researching these products online, with over 80% using the internet for product research each month.

- Showrooming, where consumers research products in-store before purchasing online, is impacting items such as fragrances, books and clothing. In contrast, some consumers are choosing to research high-value items online before completing their purchase in a store. This webrooming trend is apparent for mobiles and many other tech products.

- Half of internet users are now buying digital content online each month. Mobile apps and TV/film streaming services top the list and, crucially, the youngest internet users are the most likely to be paying for content online.

PAYING FOR CONTENT

% who paid for the following last month



Question: Which of the following types of online content have you paid for in the past month? /// **Source:** GlobalWebIndex Q4 2015 /// **Base:** Internet Users aged 16-64

Explore this data in PRO Platform /// Click here: **Commerce > Digital Content**

From Research to Purchase

What motivates online shoppers to make a purchase?

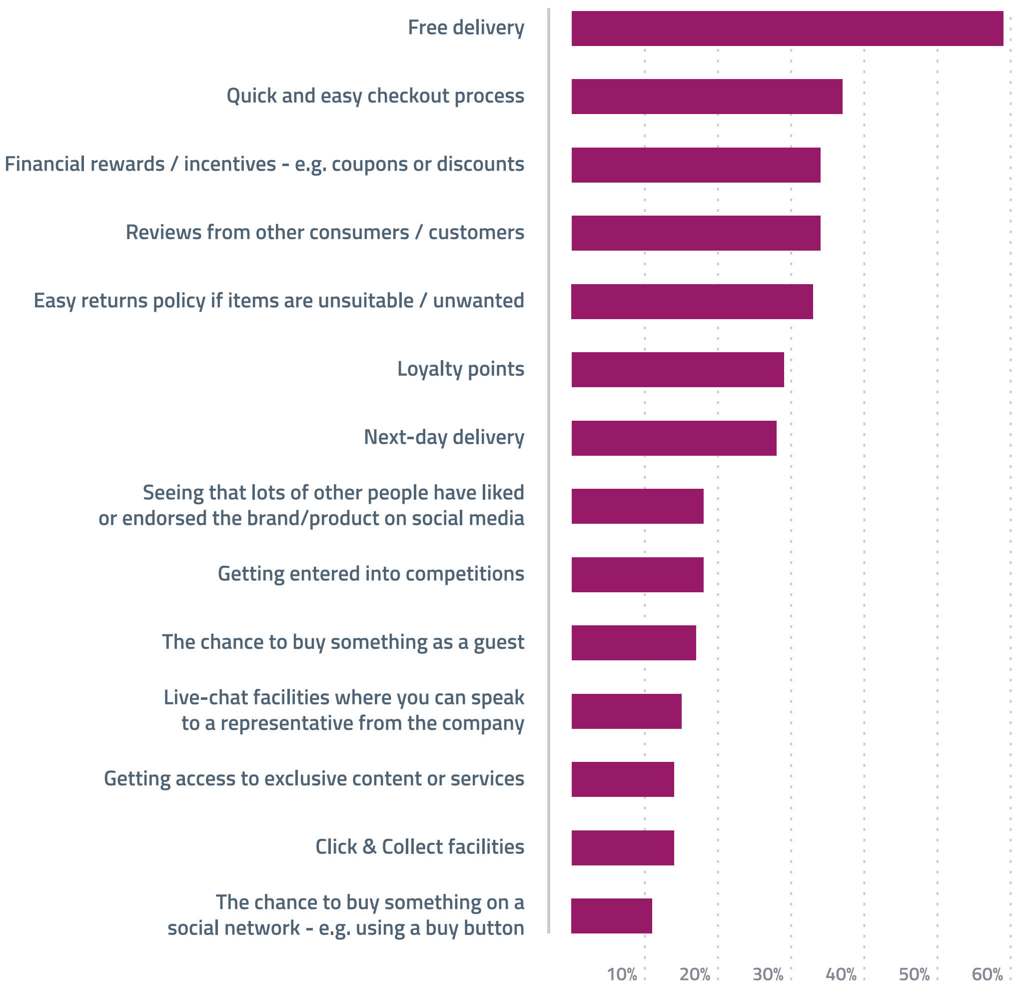
▪ Search engines remain the most important channel for online consumers conducting product research. For 16-24s, however, social networks have become a key resource for product information too.

▪ The importance of offering free delivery cannot be over-stated. This is by far the most effective way to convince online shoppers to purchase – a trend which holds true across all markets and major demographics.

▪ For most digital consumers, reviewing products they have purchased online has become the norm. 6 in 10 online shoppers are posting reviews online on a monthly basis, with mobiles being one of the most popular topics.

PURCHASE DRIVERS

% who say the following would motivate them to buy a product online



Question: When shopping online, which of the following things would most increase your likelihood of buying a product? **/// Source:** GlobalWebIndex Q4 2015 **/// Base:** Internet Users aged 16-64

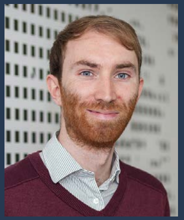
Explore this data in PRO Platform /// Click here: **Marketing Touchpoints > Online Purchase Journey > Online Purchase Drivers**

Jason Mander

Director, Research & Insight

E jason@globalwebindex.net

@thejasonmander



Felim Mc Grath

Senior Trends Analyst

E felim@globalwebindex.net

@felimmcgrath

www.globalwebindex.net

T + 44 207 731 1614 /// E hello@globalwebindex.net

/// A 3 Dorset Rise, London, EC4Y 8EN, UK