

# Baby boomers

Examining the attitudes and digital behaviors of internet users aged 58-64

**GW**I.



# In this report

GWI Generation reports are designed to examine the digital behaviors of a particular generation – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population. In this report, we place the spotlight on **Baby Boomers** – consumers aged 58–64. Please note that this focuses on primarily younger baby boomers.

- 05 Discover our data
- 07 Key insights**
- 09 **A demographic breakdown**  
*What demographics define boomers today?  
What's their financial situation?*
- 13 **The digital boomer**  
*How has COVID-19 affected their digital lifestyles? How comfortable are they online? Which apps are they using?*
- 23 **A social media presence**  
*How much are they using social media? And how do they feel about it?*
- 29 **Devices**  
*Which devices are they using? Are they mobile-first yet? Is there a demand for smart tech?*
- 35 **Brand implications**  
*How do they discover and research new brands? Which industries are set to boom in the aftermath of COVID-19?*
- 47 Appendix
- 49 Notes on methodology
- 53 More from GWI

## Methodology & definitions

All figures in this report are drawn from GWI's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle-East and Africa, and the Asia-Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

Each year, GWI interviews over 688,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include

only respondents who completed GWI's Core survey via PC/laptop/tablet.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

When reading this report, please note that we use a mixture of global data from our ongoing quarterly research, custom recontact studies from the past 6 months conducted in the U.S. and UK only, as well as insights drawn from our new GWI USA dataset which surveys internet users aged 64+.



# Discover the data on our platform

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

Sneak preview of our new platform

The screenshot displays the GWI platform interface. At the top, there are navigation tabs for 'Charts', 'Audiences', and 'Crosstabs'. Below this, a breadcrumb trail shows 'New Audience 7 May 2020 12:33'. The main area is divided into two sections. The left section shows a filter configuration for 'Include people with All of these 2 attributes'. The right section shows a summary card: 'Your audience sample size is 9,188 respondents out of 40,453'. Below this, another screenshot shows a 'New Chart 6 Feb 2020 12:33' with a table of data points.

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

## 1 Each of the graphs is numbered

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

Just click this icon to explore the data on the platform

- Source** Information about the source
- Base** and base

# Key insights

Baby boomers have **more financial concerns** than their younger counterparts.

19% actually think their personal finances are set to worsen in the next 6 months, compared to just 11% of other generations. But they're more likely to have bank accounts or credit cards, less likely to have risky short-term loans, and they have diverse financial portfolios.

**Smartphones** are more important than ever.

Over the past few years the time boomers have spent on their mobile phones has increased, while time spent on their PCs and laptops has declined steadily. Boomers are also exploring new digital services, be that online gaming, browsing for products, or using dating apps.

They're using **social media** more than ever before, but have **mixed feelings** about it.

As a result, they're hesitant to let it take over their lives; for the most part they want to stick to its fundamental components that let them keep in touch with their friends and family.

Baby boomers are more **tech-savvy** than they're often given credit for.

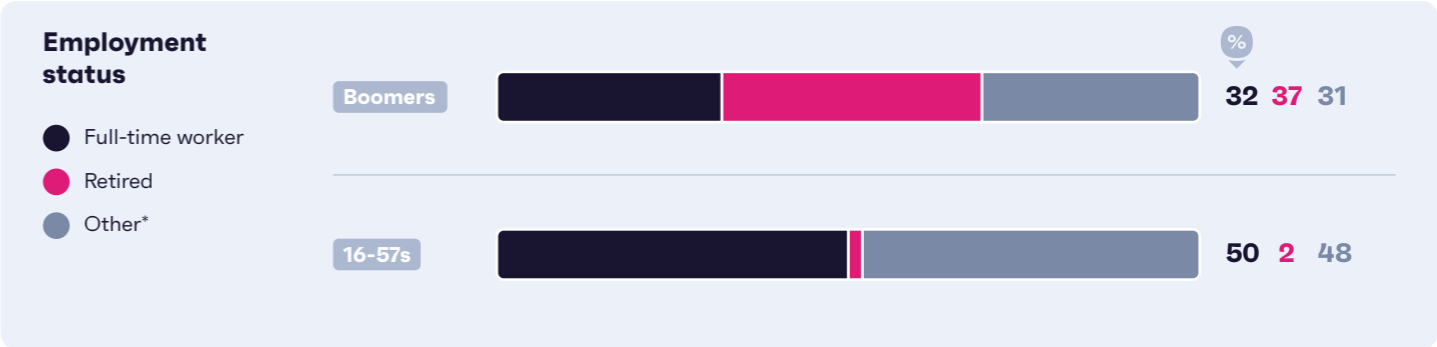
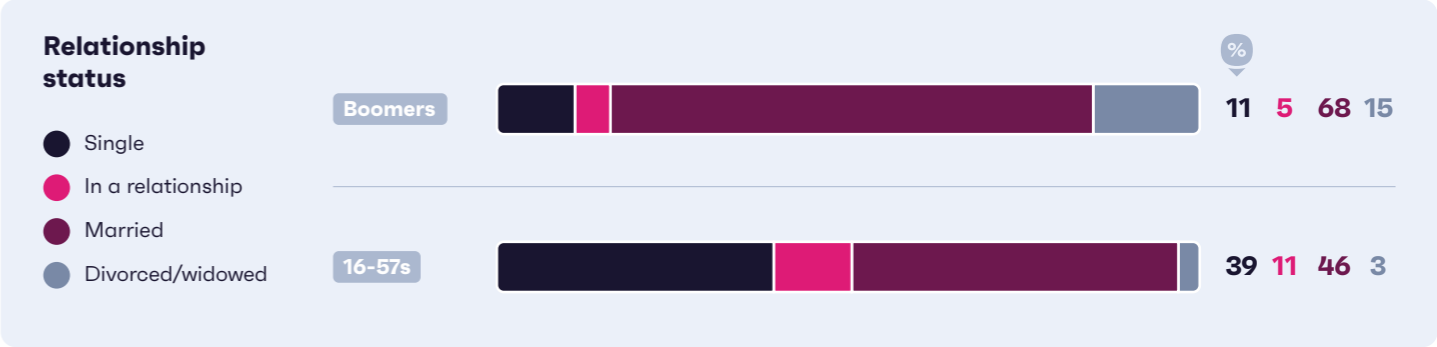
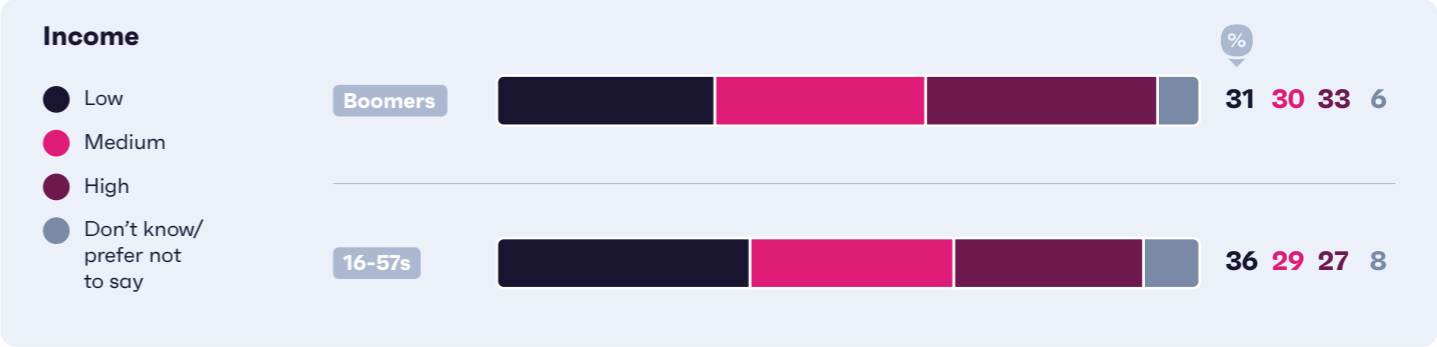
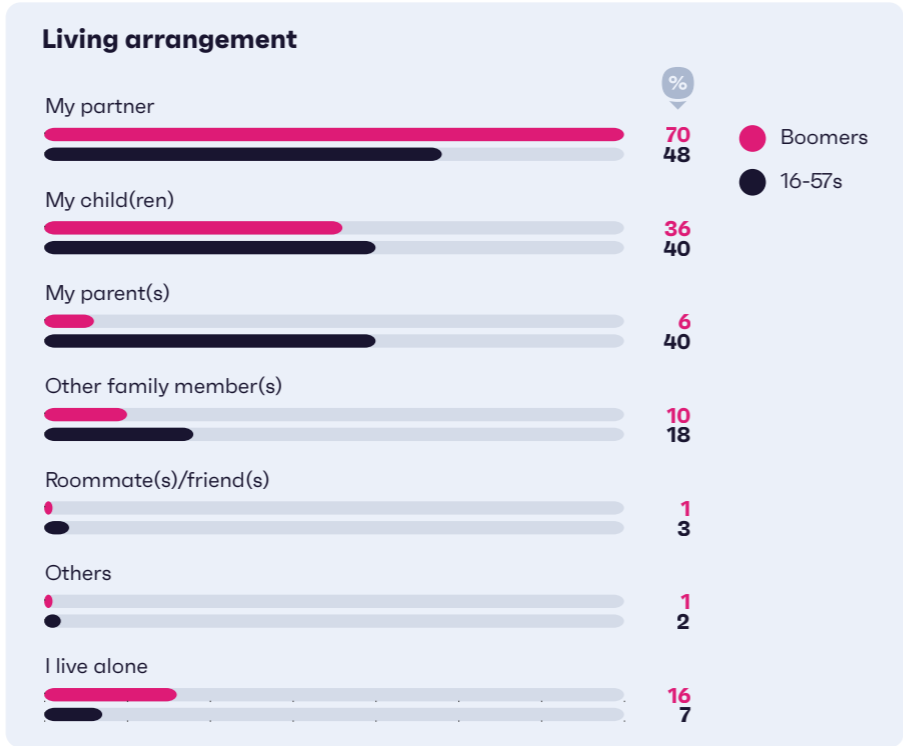
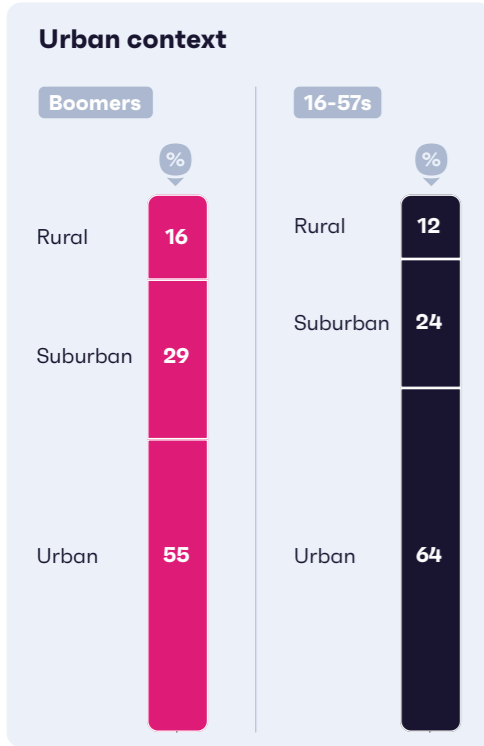
Throughout the pandemic they've started purchasing new tech at much faster rates than their younger counterparts, and last year they finally joined other age groups in saying their mobile phone is their most important device.

This group has a **unique relationship with brands**.

They want brands to be traditional but are also more concerned than every other generation about the environmental and social impact of businesses. They value brands that are transparent, reliable, and authentic, and won't hesitate to advocate for companies that offer top-tier customer service.

# A demographic breakdown

## Who are baby boomers?



\*including part-time worker, self-employed/freelancer, full-time parent/stay-at-home parent, student, and unemployed.

## Financial status

**Research** shows how baby boomers benefit from generational wealth. The implication of this is two-fold: the widening of inequality between generations will likely receive significant public policy attention, but simultaneously baby boomers outrank younger generations when it comes to consumer spending potential.

Moreover, with earlier access to COVID-19 vaccines, this generation's spending power has been unlocked sooner. For many industries, such as travel, this is key. This report will show brands looking to recover in a post-COVID world just how to tap into this audience.

Baby boomers are traditionally more financially conservative than their

younger counterparts – 19% actually think their personal finances are set to worsen in the next 6 months, compared to just 11% of other generations. However, they're more likely to have bank accounts or credit cards, less likely to have risky short-term loans, and they have diverse financial portfolios.

What's more, as the world recovers from the pandemic, boomers will likely begin spending again – for instance, they're more likely than everybody else to be planning on purchasing a domestic vacation right now (28% vs. 25%). All in all, brands looking to win them over must recognize they have some deep-rooted financial insecurities, while also understanding that they're more tech-fluent than they once were.

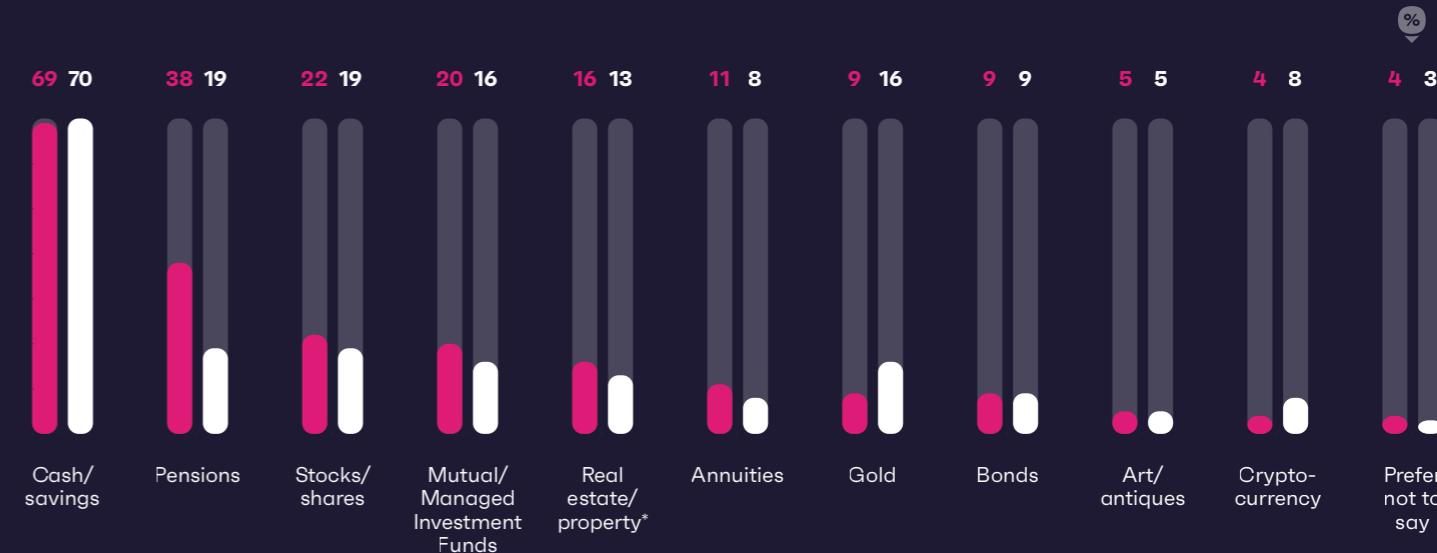
## Financial products

% who currently have the following



## Savings/investments

% who currently have the following



02

# The digital boomer



## Online activities post COVID-19

Compared to 2015, the total time boomers spend online each day has stayed pretty consistent – only rising by a relatively small half-hour. But how they’re doing it has changed. Time spent online on mobile has more than doubled, while browsing on PC/laptop/tablet has been gradually falling, and in Q1 of this year it dipped below three hours per day for the first time.

This isn’t to say they use mobile as much as their younger counterparts. A clear distinction to make is that while Gen Z and millennials have a compulsive desire for the latest tech, boomers are far more selective. In other words, due to not being digital natives, they retain

a healthy skepticism of the digital world. Brands targeting this generation should embrace this. For instance, by partnering with *The Times*, **Ancestry** was able to provide content in both traditional print as well as digital formats – effectively complementing boomers’ varied media consumption habits.

That said, there are a few – yet crucial – ways that boomers are using the internet so much that they’re outpacing their younger counterparts.

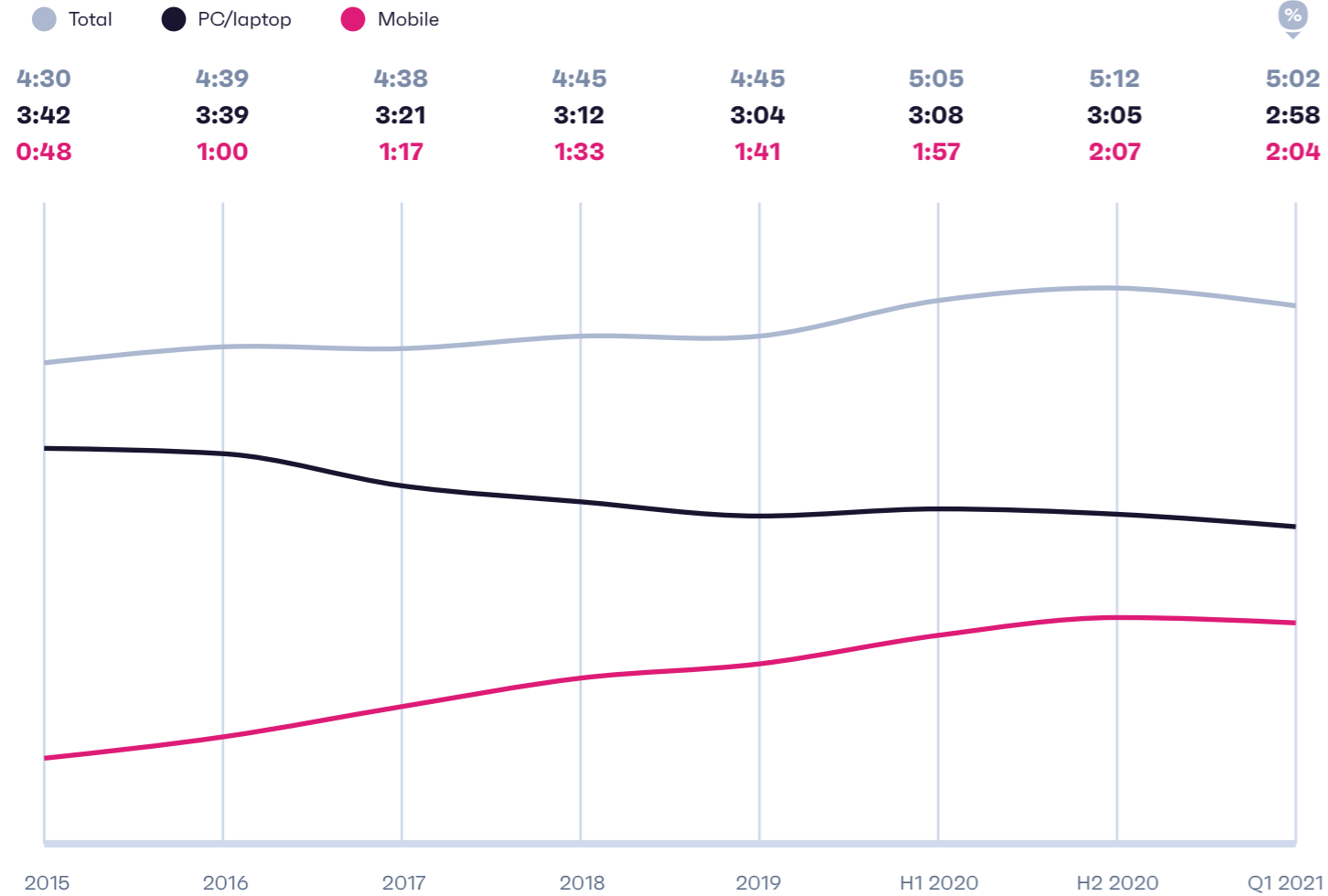
They have a lead on younger age groups for using digital government services, and the various digital touchpoints required to negotiate the COVID-19

pandemic (learning about the virus, using QR codes, booking vaccinations) has likely helped in that regard. This increased use of digital services may have acted as a gateway to other online activities.

In fact, when it comes to buying a product online, they’ve caught up with their younger counterparts and overtaken them for browsing specifically. Moreover, in our recent report, **The gaming playbook**, we explored how those aged 55-64 had experienced the biggest **growth in gaming** since 2018. This continues to be the case – nearly a quarter of baby boomers have now downloaded a free-to-play video game in the last year.

## Mobile booms among boomers

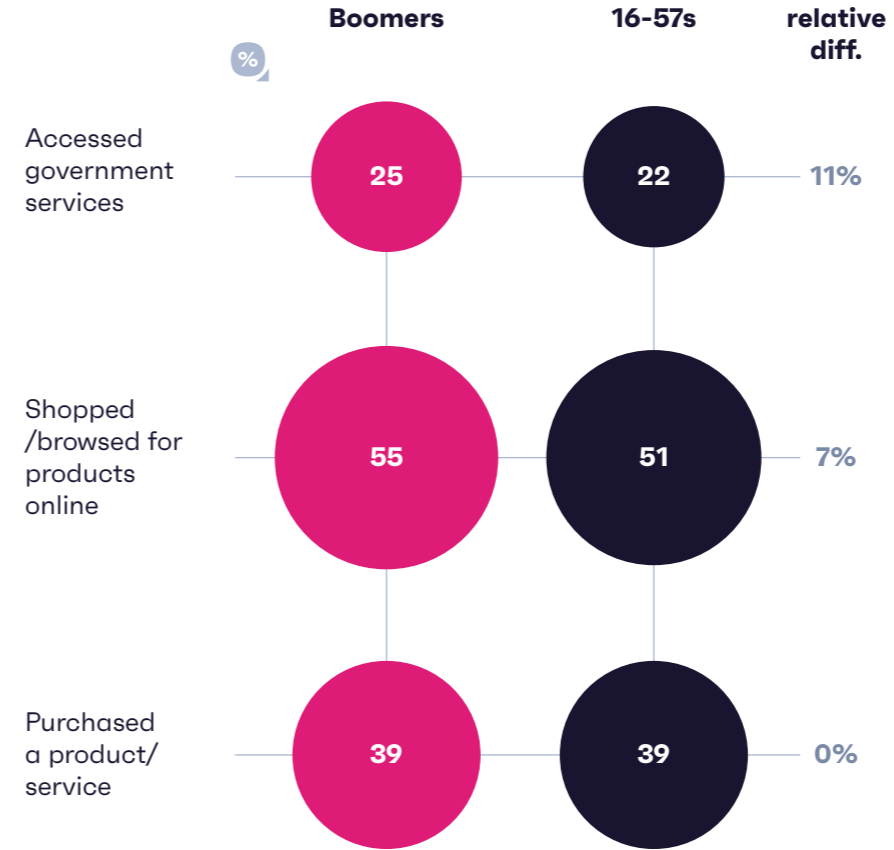
Average time spent by boomers each day on the following



3

## Online activities in the past week

% who've done the following in the last week (sorted by boomer relative difference)



4

GWICore Q1 2015-Q1 2021  
 215,168 baby boomers born between 1957-1963 (please note trended data accounts for year-on-year aging of the sample)

GWICore Q1 2021  
 13,875 baby boomers aged 58-64 and 167,192 internet users aged 16-57





## Insecure surfers

As we just noted, boomers have a conservative relationship with technology. They're not susceptible to signing up to the latest craze; rather, they'll use digital services as and when they need them. Nowhere is this more obvious than in how they protect themselves online.

What sets them apart from other generations are their greater-than-average concern about how companies collect their data online. For example, a study from **Axios** found that older consumers spend more time reading privacy policies before accepting them. It's likely that despite awareness around privacy concerns being up among all age groups, it's older groups who have the time and willingness to take action to protect their data.

To protect themselves, boomers use several methods – in fact they're more likely than others to regularly clear their browsing history/cache or to decline cookies on a website. Nonetheless, other methods are used less often, such as ad-blockers, VPNs, and private browsing.

Among boomers who do use ad-blockers, aside from data security, irrelevant advertising is a common reason for usage. In fact, just 10% of baby boomers feel represented in the advertising they see – making them the least likely generation to think this. This is key – baby boomers will only become more accessible online if advertisers do more to target them better.

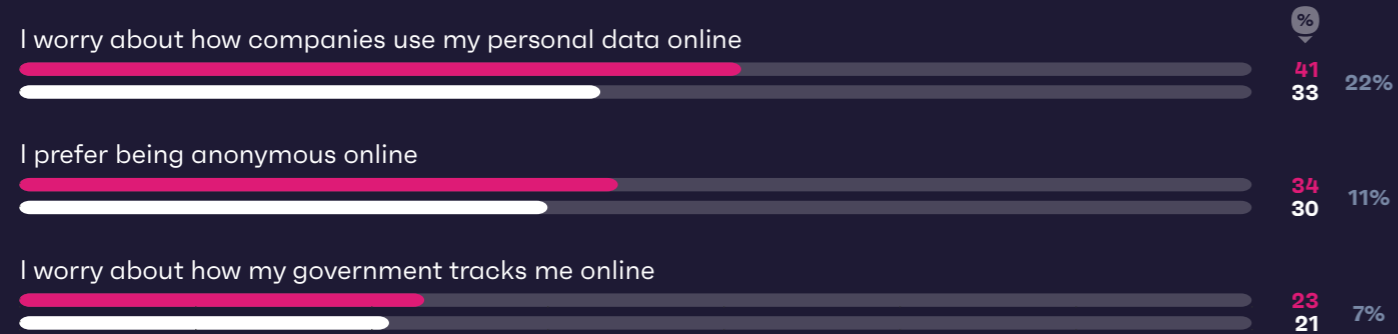


Whether it's under-representation in media images or insensitive stereotyping, older consumers are commonly **ignored and distorted** in marketing. Combating this has been doubly important over the last year. AARP, a U.S. based interest group focusing on issues of those aged over 50, is leading the way here and encouraging marketers to identify their **purpose in people's lives**. Amid the pandemic, this meant shifting away from touting commercial benefits and instead talking about health, work, finance, and caregiving.

## Concerns about tech

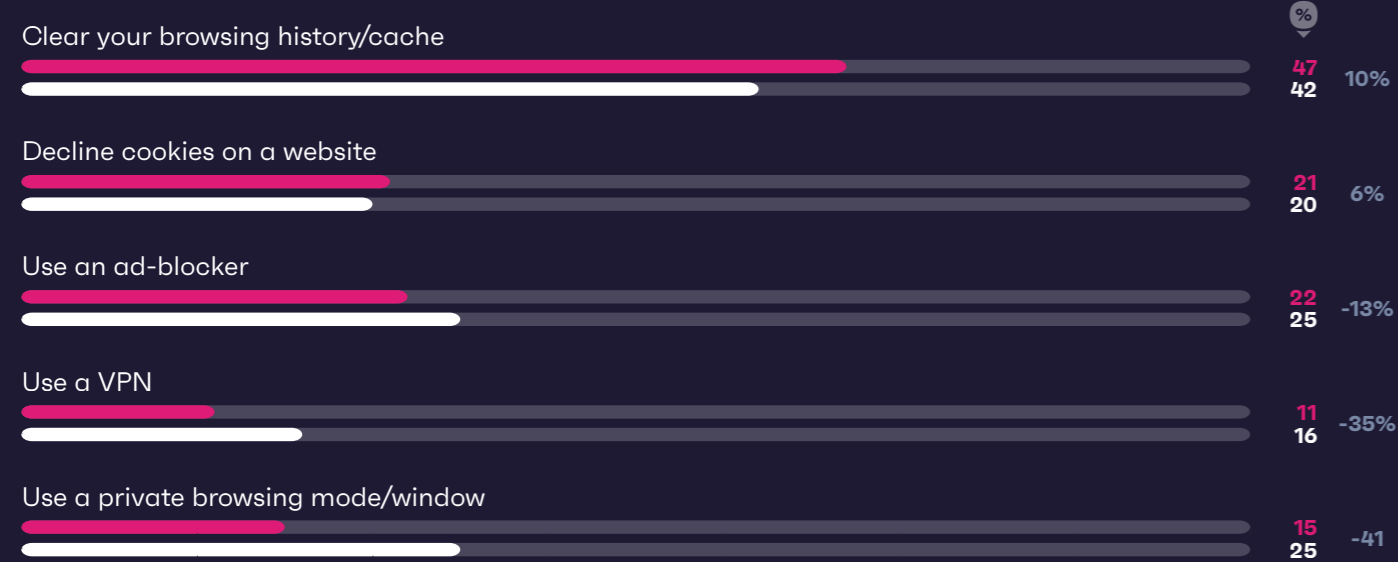
% who agree with the following\*

● Boomers ● 16-57s ● Relative diff.



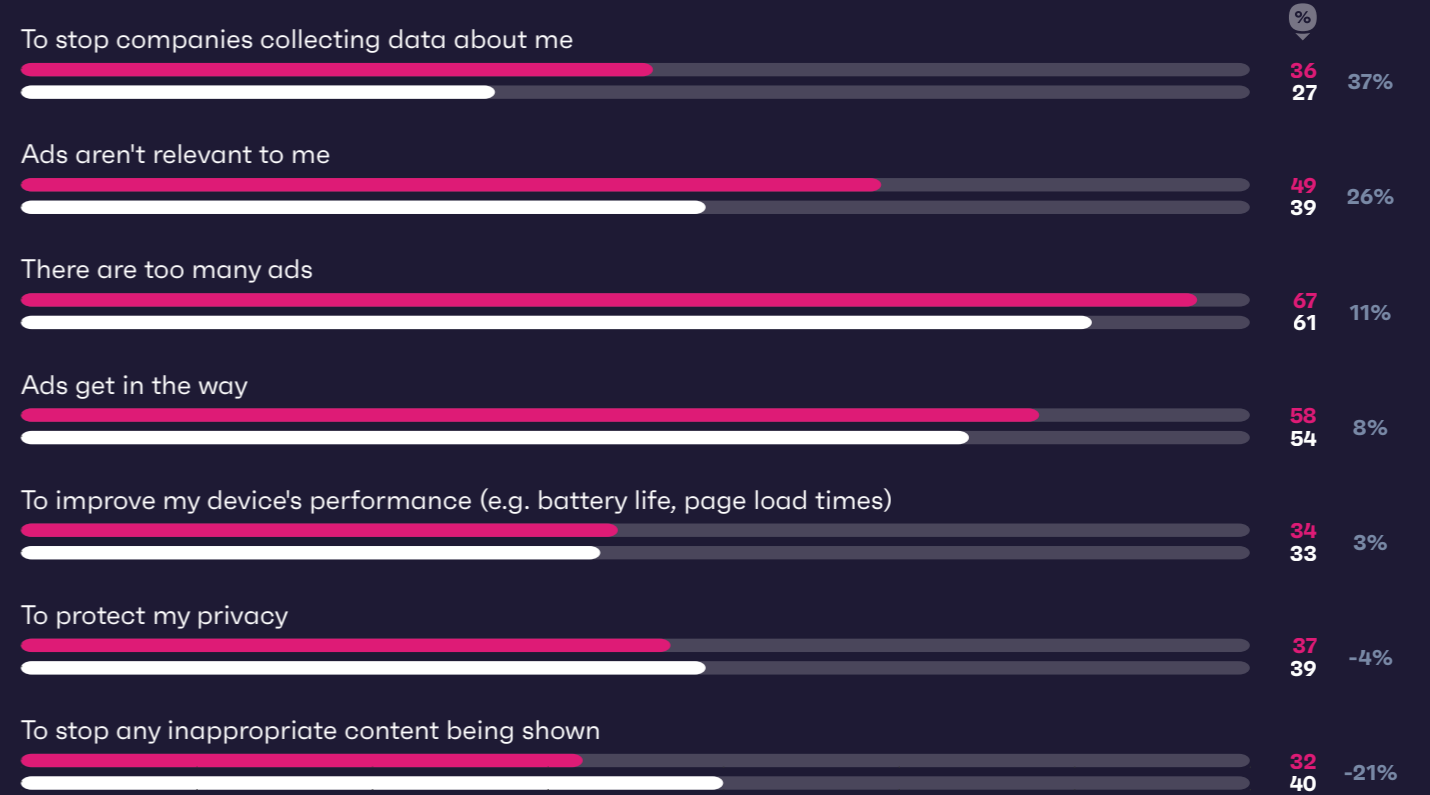
## Online privacy, ad-blocking, and VPNs

% who regularly do the following\*



## Reasons for using an ad-blocker

% of ad-blockers who use them for the following reasons\*



\*sorted by boomer relative difference



GW I Core Q1 2021

13,875 baby boomers aged 58-64 and 167,192 internet users aged 16-57

## App usage

As would be expected, the majority of app types are used more by younger people. That said, a few do skew toward our boomer audience – the popularity of banking, investing, and insurance apps, for instance, reflects their greater financial interests. Moreover, with the likes of email, news, and weather coming up top, it’s clear that boomers use more traditional apps that offer instant utility.

At the other end of the scale, boomers are less interested in education, lifestyle, or fashion apps.

COVID-19 has significantly affected which apps boomers are using. And even as vaccination programs are rolled out across the globe, certain apps continue to struggle. In fact boomers were 10% less likely to use travel apps in Q1 2021 compared to Q4 2020. Interestingly, however, in the UAE and Israel – the countries with

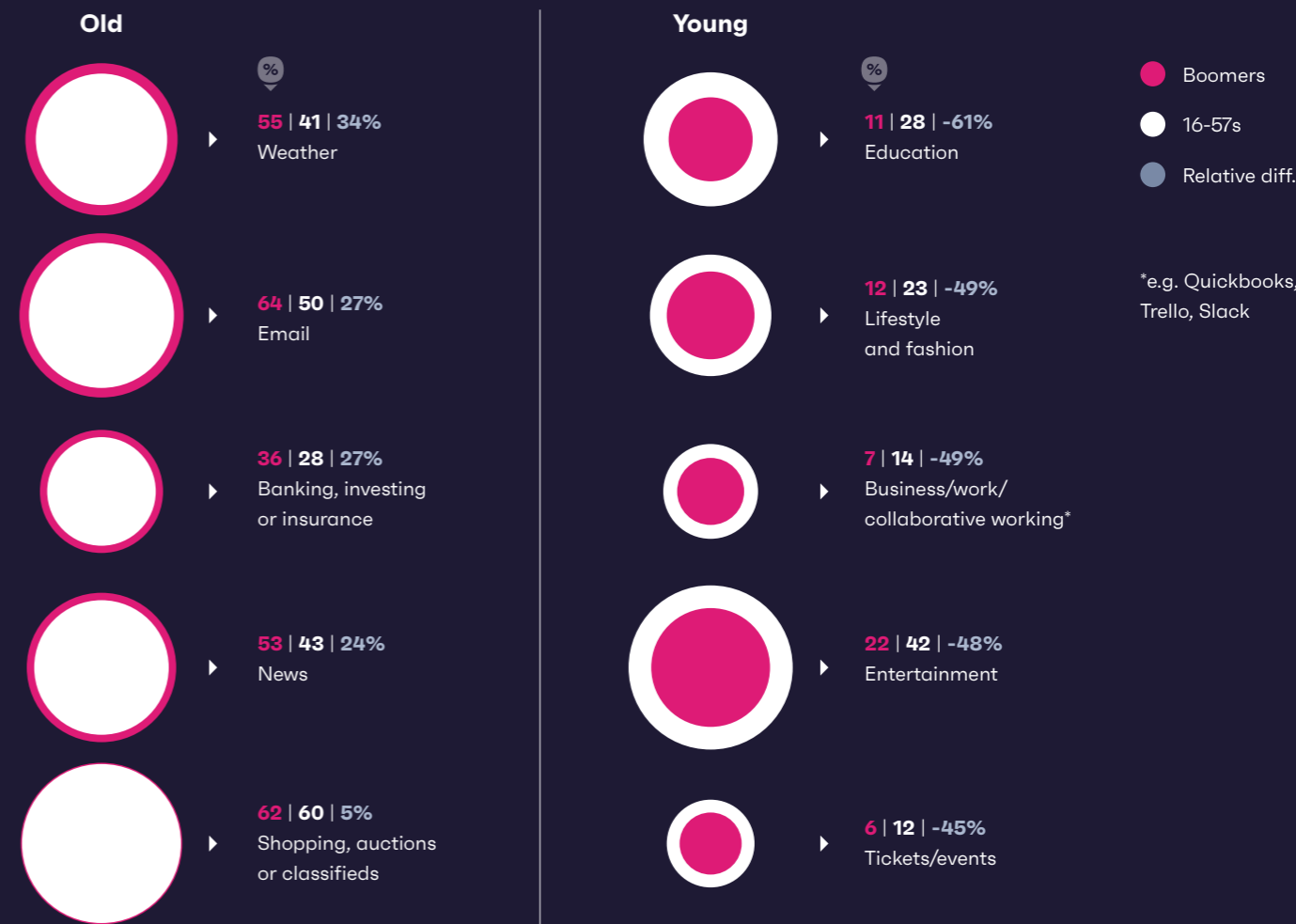
the most successful vaccination programs – the trend was reversed. Boomers in those countries became 37% more likely to be using travel apps.

Other apps are primed to boom as we come out of the pandemic – one to keep an eye on is dating apps. Again comparing Q1 2021 with Q4 2020, boomers were 13% more likely to have used a dating app in the last month – what’s more, boomers in the UAE and Israel were over twice as likely. Compared to their younger counterparts, boomers are over twice as likely to live alone and 26% are single, divorced, or widowed. For some, lockdowns have been a very lonely time and dating apps present an opportunity to reconnect with others. **SilverSingles** provides this service for those over 50 and the app has reported healthy **growth** in the number of new monthly users over the last few months.

11% of single baby boomers in the U.S. expect to start dating in the next 6 months

## Top 5 app types that skew...

% who’ve used the following apps in the last month (sorted by boomer relative difference)



GWl Core Q1 2021 13,875 baby boomers aged 58-64 and 167,192 internet users aged 16-57

# A social media presence

## A love-hate relationship with social media

Just 19% of baby boomers have more than five social media accounts, compared to 38% for younger audiences. Moreover, on average this generation spends 1 hour and 20 minutes per day on social media, compared to 2 hours and 27 minutes for their younger counterparts. It's not surprising, then, that baby boomers are considerably less likely than younger people to worry that they spend too much time on social media or that it gives them anxiety.

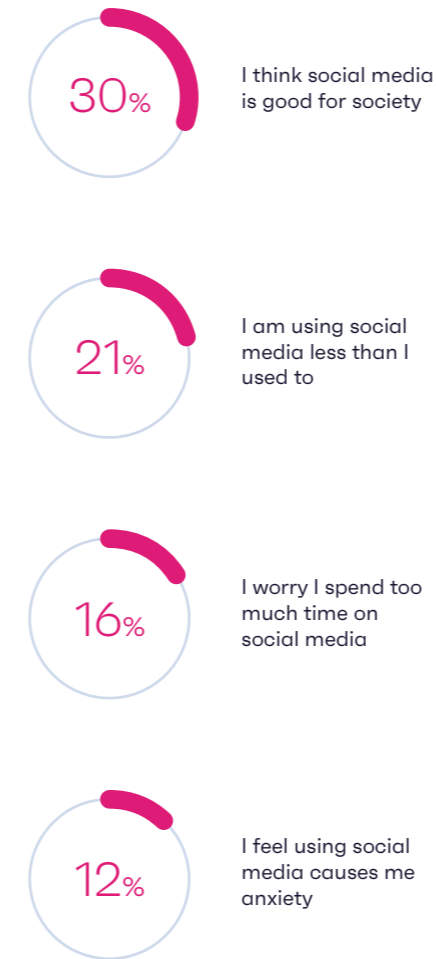
They are, however, less likely to believe that social media is good for society. Despite the gulf in usage, compared to 2015 boomers today are now spending 40% more time on

social media, while for everyone else it's only increased by 27%. It's likely that as social media gains a bigger hold on their lives, baby boomers will continue to maintain a love-hate relationship with it.

As a result, they remain hesitant to venture too far into the realm of social media. As with their tendency to pick and choose their uses for technology, boomers prioritize social media for its fundamental components, most importantly to keep in touch with their friends and family. Other applications of social, be that reading the news or sharing opinions, fall much further down the list.

## Social media attitudes

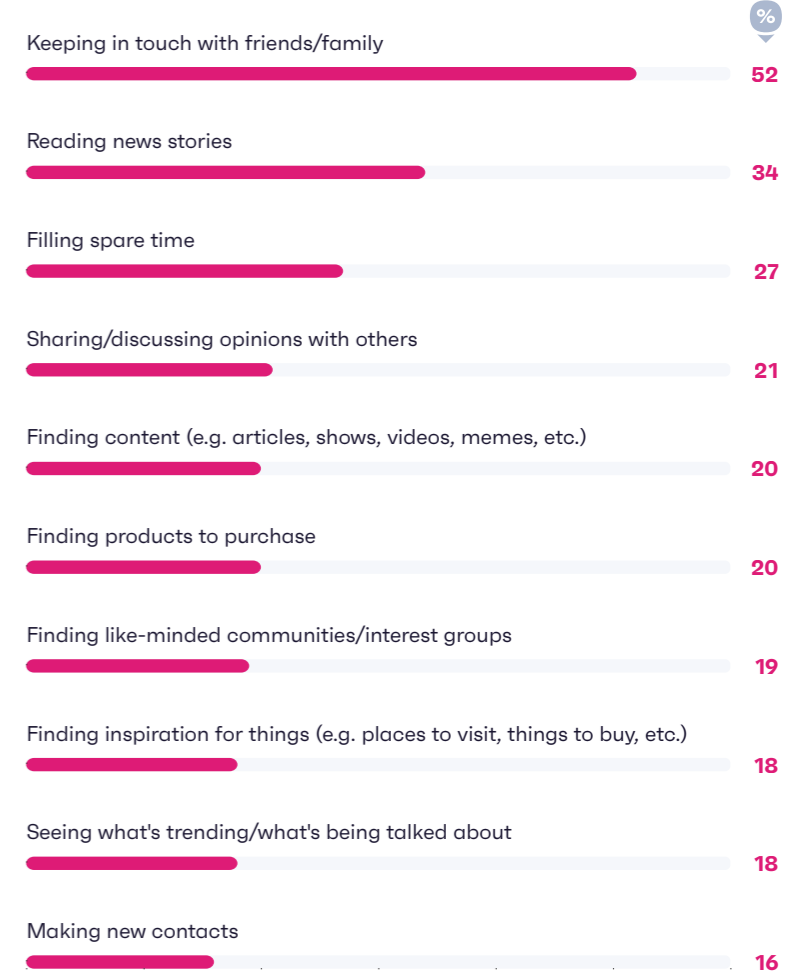
% who agree with the following...



GW I Core Q1 2021  
13,875 baby boomer internet users aged 58-64

## Top 10 reasons for using social media

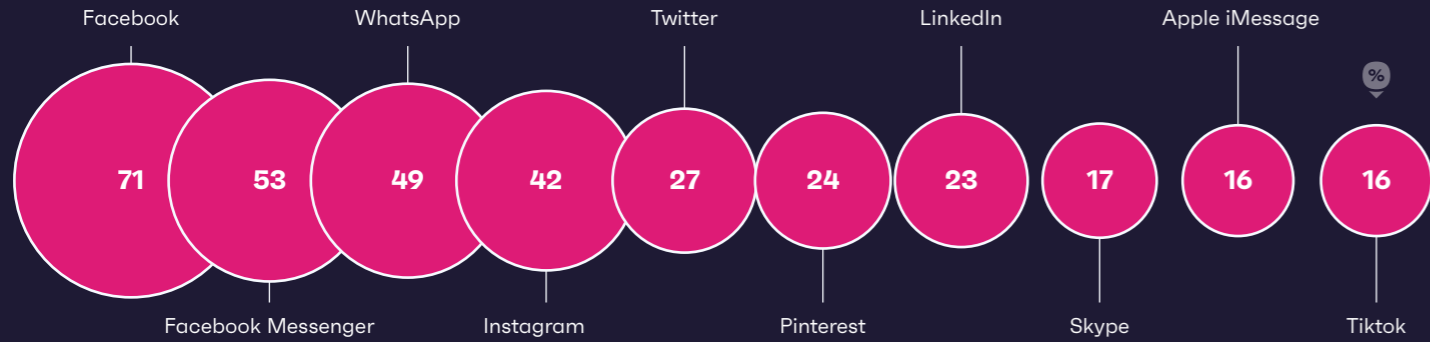
% who use social media for the following reasons



## Top 10 social media/messaging services among boomers

8

% of baby boomers, outside of China, who use these apps at least once a month



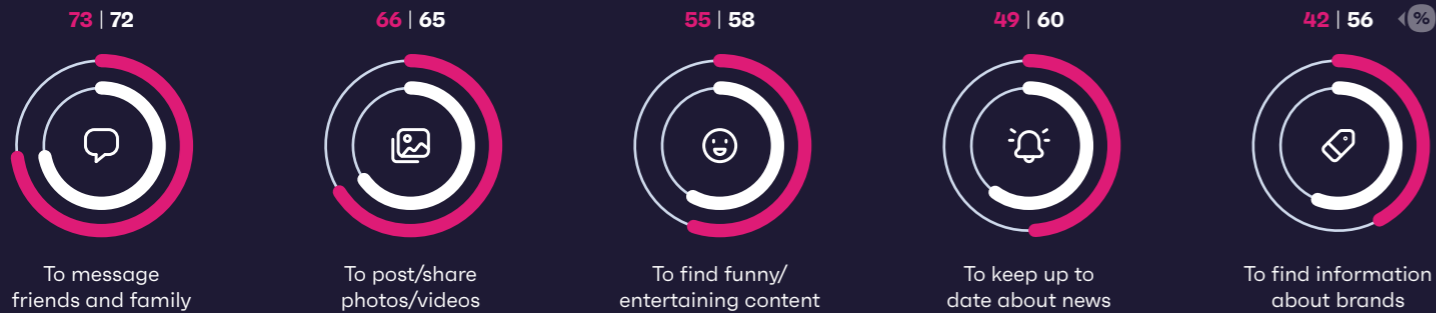
GWI Core Q1 2021 13,032 baby boomers aged 58-64 outside of China

## Reasons for using Facebook

9

% of Facebook users, outside of China, who use it for the following reasons

Boomers 16-57s



GWI Core Q1 2021 9,415 baby boomers aged 58-64 and 113,060 Facebook users aged 16-57 outside of China

## The social media landscape

Boomers' first experiences on social media were likely on Facebook-owned apps, including Messenger, WhatsApp, and Instagram; so it's no wonder that these continue to be the most popular. That said, other apps are gaining their attention – for instance, outside of China, TikTok is now the 10th most popular app among boomers with 16% using it at least once a month.

When it comes to what they use their social accounts for, baby boomers continue to stick to what they know. We can see this clearly when comparing how they use Facebook with younger users. They're actually slightly more likely to be using it for messaging and posting, but they fall behind when using it for other reasons.

26% of boomers outside of China say Facebook is their favorite social media site, compared to 21% of everyone else

Trend in action

# Baby boomers and social media: a local success story?

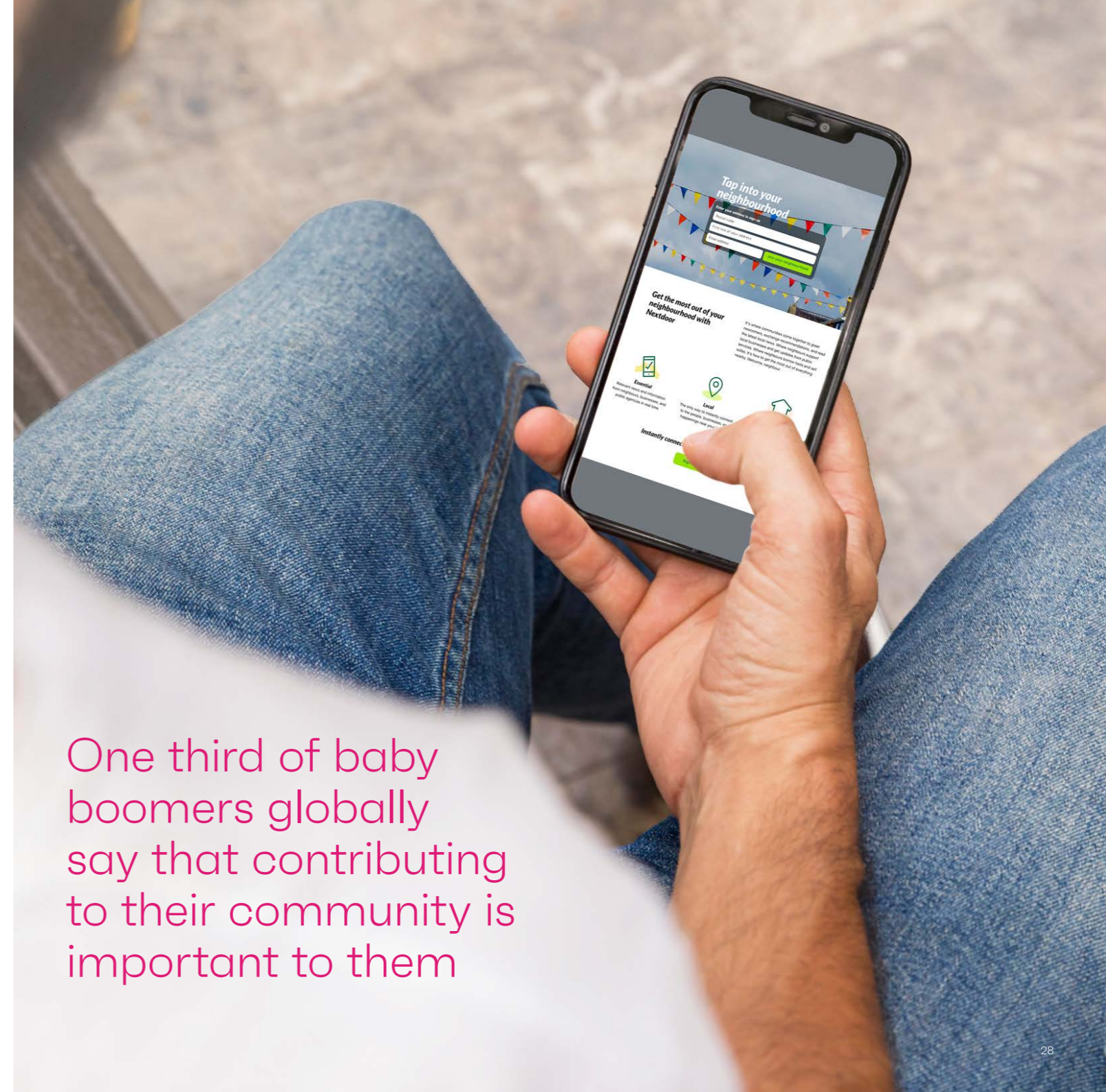
While social media apps are plentiful, providing a niche that wins over skeptical baby boomers is easier said than done. A platform designed for local communities could be the answer and a couple of players are competing to win in this space.

**Nextdoor** is a social media app for local communities to come together to greet newcomers, exchange recommendations, and

share hyper-local news. In the U.S. and UK, 18% of baby boomers visit the site every month, compared to 16% of Gen X, 11% of millennials, and 5% of Gen Z – making it one of the only social platforms we track that skews in favor of older generations.

Baby boomers value their community and seek to support it, and Nextdoor is tapping into this behavior to promote an innovative social

media for a generation who otherwise is skeptical of expanding their social media footprint. It's a success story that hasn't gone unnoticed: Facebook has recently launched a very similar new feature called **Neighborhoods**. Already a fond favorite of baby boomers, Facebook likely hopes this will win them over and act as a catalyst to persuade them to venture deeper into its other offerings.



One third of baby boomers globally say that contributing to their community is important to them

# The shifting device landscape

## Devices that entertain

It's no secret that baby boomers have historically been **slower adopters** of new technology. For years their ownership of newly released devices, like e-Readers and smart TVs, lagged far behind their younger counterparts.

However, recently they have begun buying these devices in droves. In some categories, like smart TVs, e-Readers, and TV streaming devices, boomers have even overtaken other generations to become the most likely age group to own these devices.

This trend has been slowly building

for years, but all the added time stuck at home during pandemic lockdowns played a huge role in the recent uptick. While baby boomers remain 21% less likely than other generations to say they're confident using new technology, and nearly 2x less likely to say they buy new tech as soon as it's available, many took the time during various waves of quarantine to become more proficient using digitally connected devices.

As a result, since the start of the pandemic baby boomers have purchased smartwatches, wristbands, and smartphones at much faster rates than their

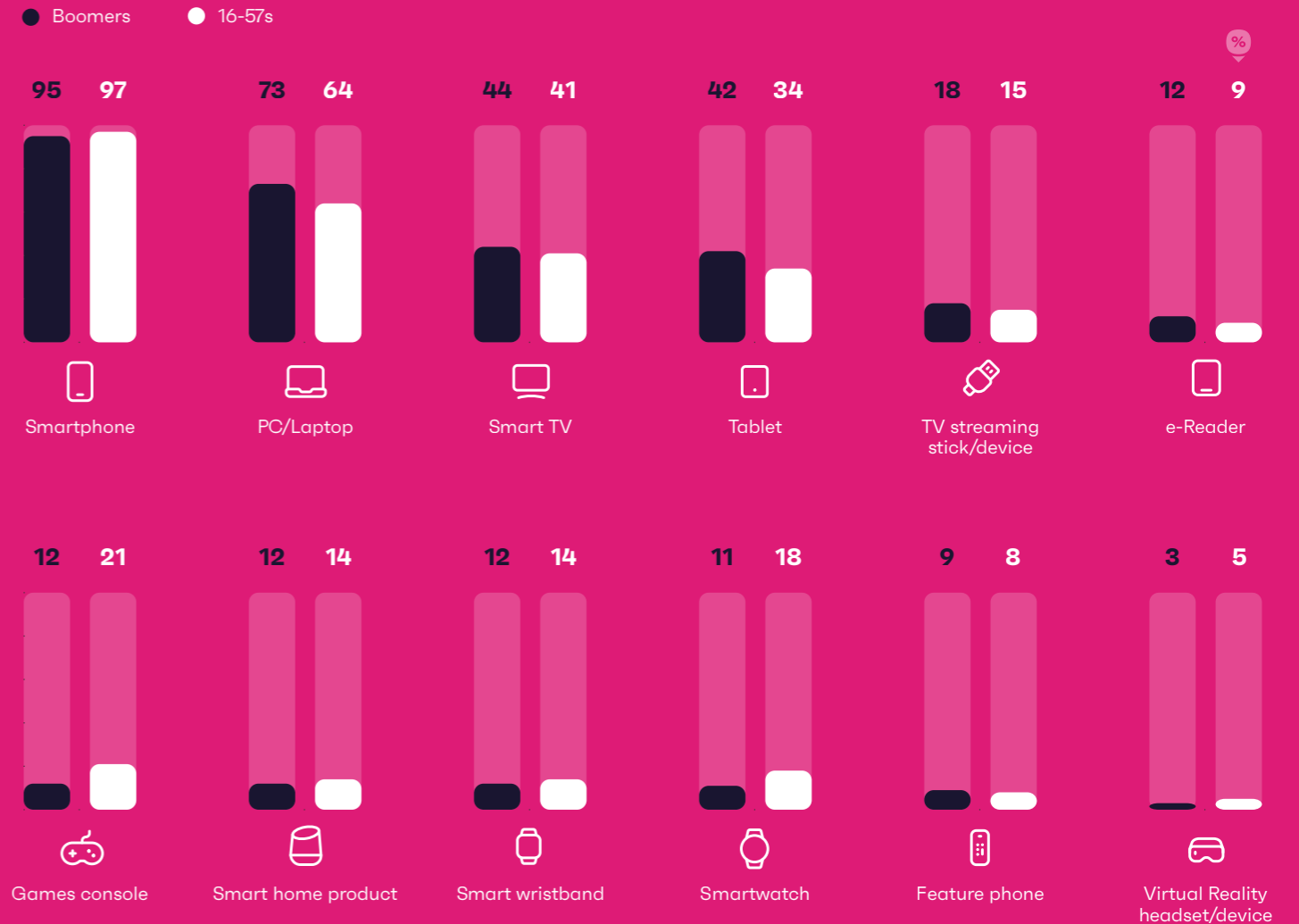
younger counterparts.

Baby boomers are more **tech-savvy** than they're often given credit for, and the products they continue to invest in reveal just how much their relationship with technology differs from other age groups.

They spend more time watching broadcast TV and they're 15% more likely than other generations to say they're interested in books and literature. Their new devices allow them to do these activities in digitally connected ways.

## A booming uptick in entertainment tech

% who own the following



GWJ Core Q1 2021 13,875 baby boomers aged 58-64 and 167,192 internet users aged 16-57

## The growing importance of mobile

Even with much of the world stuck at home for most of the year, consumers still took to their phones to fill their days, and baby boomers were no different.

Among the boomer generation smartphones have been slowly rising in importance for years, and in Q3 2020 they finally surpassed PCs, laptops, and tablets combined to become boomers' most important device.

Compared to other devices, younger generations have valued their mobile phones most for years now, but this recent shift toward mobile among baby boomers has huge implications

for digital sellers and advertisers, who have often **overlooked** this generation in the past.

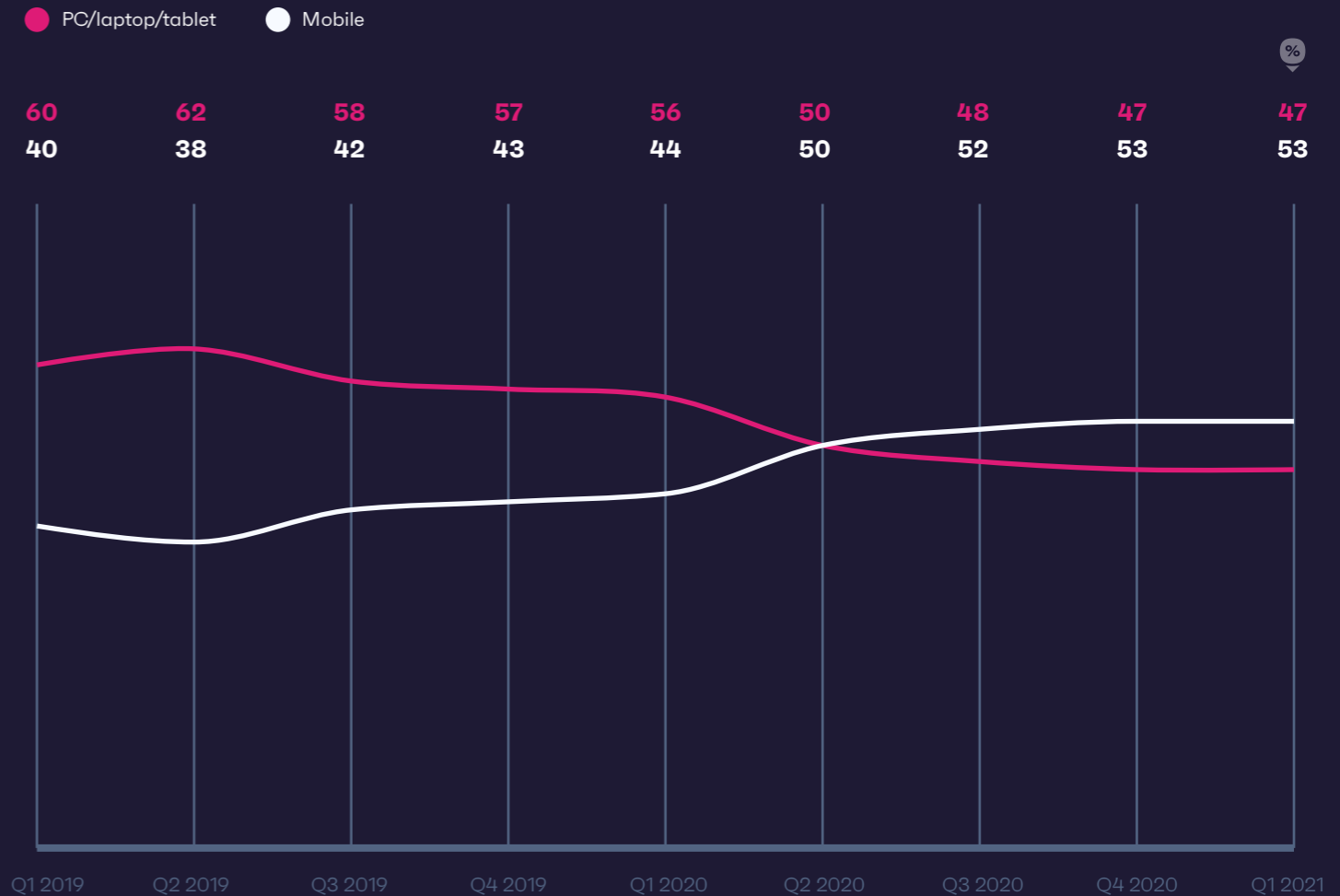
Shortly after mobile overtook other devices, the portion of baby boomers doing vital online tasks on their mobile phones reached their highest points since we began tracking mobile behaviors in 2017.

During the pandemic, boomers have become more likely than ever to purchase products through their phones, and by the beginning of 2021, 3 in 10 used their mobile phone to shop or browse for products online in a given week.

# Over half of baby boomers now say their mobile phone is their most important device

## Mobile overtakes other devices

% of baby boomers who say the following device is most important to them for accessing the internet

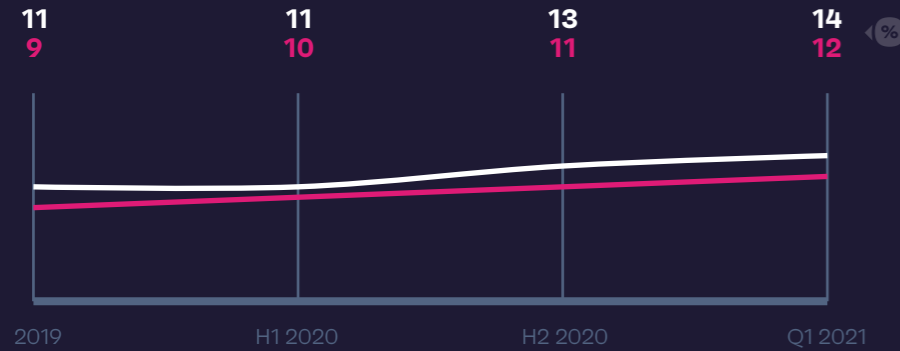


GWICore Q1 2019-Q1 2021  
142,155 baby boomer internet users born between 1957-1963 (please note trended data accounts for year-on-year aging of the sample)



## Smart product owners

% who own a smart product



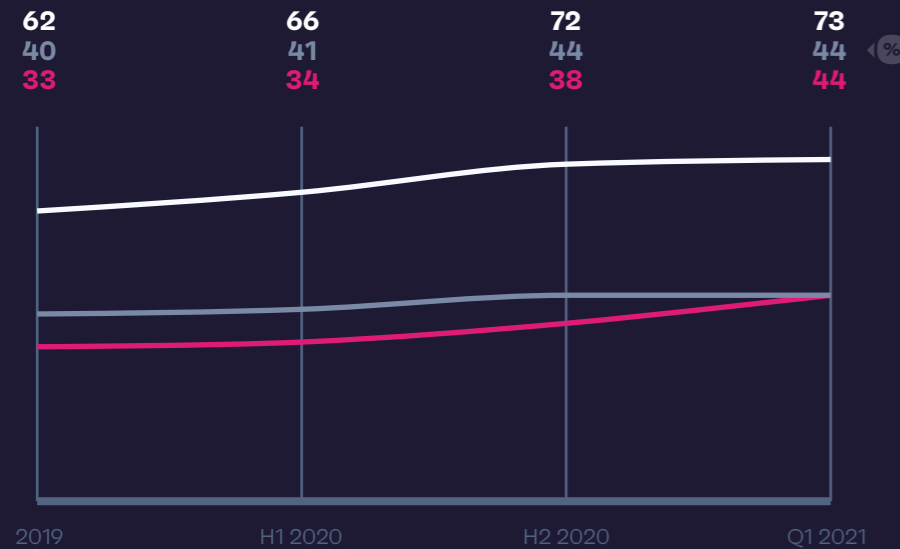
- 16-57s
- Boomers
- 📊 GWI Core Q1 2019 - Q1 2021
- 👥 142,155 baby boomers and 1,351,914 internet users aged 58-64

12

Since 2019 baby boomers have become 36% more likely to own a smart home product

## Smart products: the boomer breakdown

% of baby boomer smart product owners who have the following



- Smart speaker (e.g. Apple HomePod, Amazon Echo, Google Home)
- Smart utility product (e.g. remotely controlled thermostat, light, plug or sensor)
- Smart security product (e.g. remotely controlled doorbell or security camera)
- 📊 GWI Core Q1 2019 - Q1 2021
- 👥 16,293 baby boomers, who own smart products, aged 58-64

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

## Outfitting smarter homes

Despite falling short of the growth **projected** before the pandemic, sales of smart home technology increased a sizeable amount over the course of 2020. A good deal of this growth was driven by baby boomers who began outfitting their homes with smart technology at a much faster rate than other generations.

Many boomers saw the benefits of new smart ways to manage their home life, and although they're typically later adopters of new technology, these purchases show that boomers will adopt more advanced

technology if it offers them genuine utility.

Smart technology companies are beginning to catch on. While the pandemic exacerbated America's **loneliness epidemic**, Facebook saw the opportunity to target grandparents with their new smart video-chatting device that could combat that loneliness.

In fact, the usefulness of smart speakers has become very attractive to baby boomers overall. Smart speakers offer a way to access technology without much technological experience. Simply

saying "OK Google" is a much smaller barrier to entry than navigating the many tips and tricks of other smart technology, so it's no wonder that these devices are among the most popular smart products for baby boomers.

On the other hand, there are other barriers to entry when it comes to smart technology. Over 4 in 10 baby boomers say they worry about how companies use their personal data online, and this fear may be keeping many boomers away from installing smart speakers or smart security cameras in their homes.

# Brand implications

## The purchase journey

Despite the massive shift toward digital channels that has been noted throughout this report, TV is still the main arena for baby boomers when it comes to brand discovery.

In Q1 2021, baby boomers spent nearly an hour more per day than other generations watching broadcast television, so it's no surprise that they're far more likely to find new brands through this medium – as opposed to social media channels where younger generations spend much more of their time.

This doesn't mean that digital channels aren't also successful ways to reach baby boomers. They're more likely than other age groups to both discover and research brands on search engines, and can be particularly swayed by a good online review.

Even though boomers have accumulated more wealth on average than other generations, they remain quite price-sensitive when it comes to the products they're willing to buy. They're 25% more likely than other age groups to research brands on

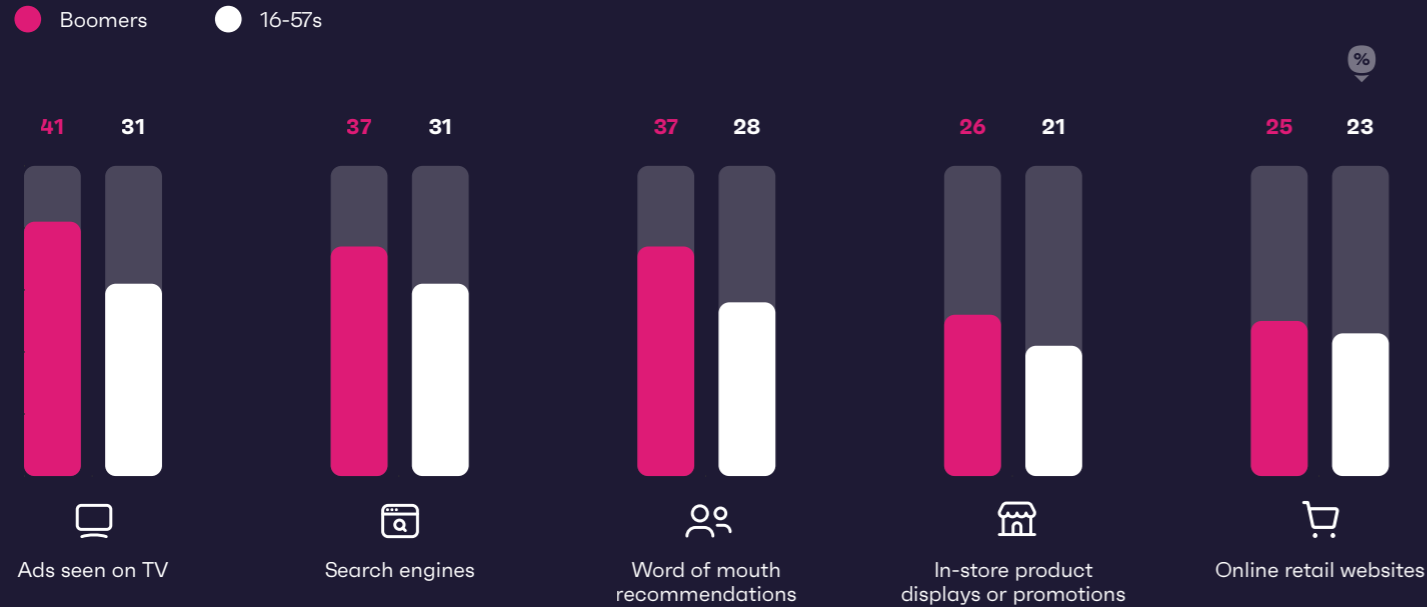
price comparison websites, and over 4 in 10 say that coupons and discounts would make them more willing to purchase a product online.

Baby boomers have **flocked** to digital shopping channels this past year; even still, they can be put off by added costs and unnecessary hassle in the digital space. They're much more willing to purchase products online if they can avoid costs related to shipping and returns, and at the end of the day they want a seamless experience.



## Brand discovery

% who find out about new brands and products in the following ways



Baby boomers are over 30% more likely than other generations to discover brands through TV ads

## Online product research

% who use the following online sources when they are looking for more information about brands, products, or services



## Online purchase drivers

% who say the following features most increase their likelihood of buying a product



GWJ Core Q1 2021 | 13,875 baby boomer internet users aged 56-64 and 167,192 internet users aged 16-57

## Travel is roaring back

The vaccination rollout in the U.S. has so far been very successful. This means that many industries are starting to show signs that normality is just around the corner, and baby boomers are driving a lot of that optimism.

Baby boomers, who spent most of the pandemic year being cautious, are now getting out of the house in **droves**, and this means that many American boomers are beginning to make travel plans again. If we take the U.S. as the blueprint for what we can expect from the rest of the world as vaccinations increase, there's great news ahead for the travel and tourism industry.

The portion of boomers who are planning to buy trips in the next 3-6 months, either abroad or domestically, is slowly climbing back to their pre-pandemic numbers.

While they haven't reached their 2019 peaks, it's clear that travel is on the rise, and there are signs that the ways in which boomers are spending their vacation time may remain quite different from before the pandemic.

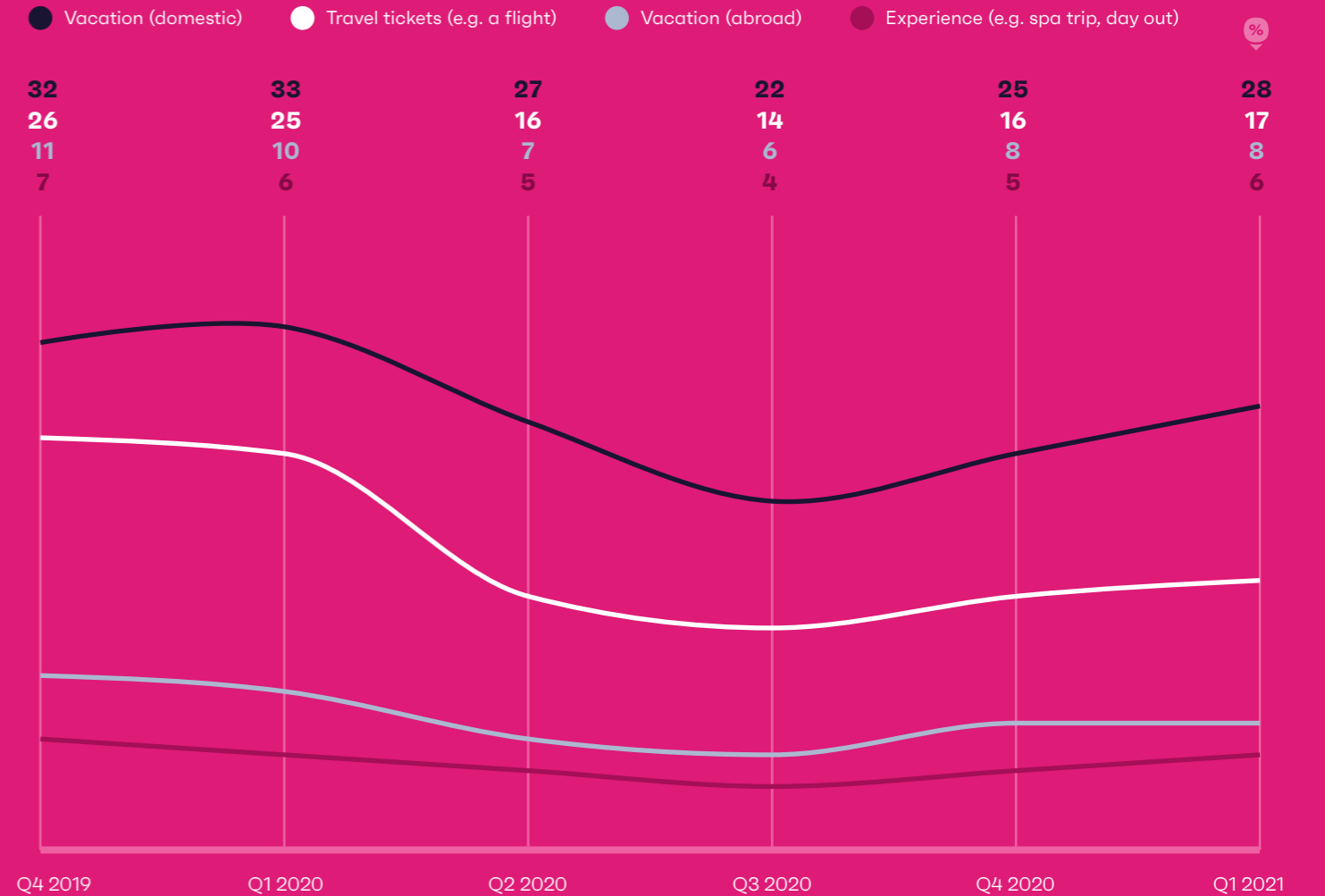
Domestic vacations and experience-based trips are seeing the fastest returns to normal, and in some ways the pandemic is having a lasting effect on the comfort that boomers feel staying in a hotel versus rented accommodation.

While the number of boomers who say they stay in a hotel at least yearly has been steadily falling since before the pandemic, the number of American boomers who say they stay in rentals like Airbnb is higher than ever. Travel is coming back fast, but not in the same way as before COVID.

# One third of baby boomers are planning to purchase a vacation in the next 3-6 months

## The U.S. travel boom

% of U.S. boomers thinking about purchasing the following in the next 3-6 months



GWI Core Q4 2019-Q1 2021

24,264 U.S. baby boomer internet users born between 1957-1963 (please note trended data accounts for year-on-year aging of the sample)



## Baby boomers are more likely than other generations to want brands to be eco-friendly and socially responsible

### Implications for brands

Baby boomers stand out in a number of ways when it comes to the expectations they have of brands.

More want brands to be traditional than their younger counterparts, but this doesn't translate into less concern about progressive issues.

On the contrary, baby boomers are actually more likely than younger generations to want brands to be eco-friendly, socially responsible, and

supportive of local suppliers.

It's important for brands to realize these aren't just values they can support through marketing messages alone, as baby boomers are willing to put their money where their mouth is: globally, 56% of baby boomers are willing to pay more for an eco-friendly product.

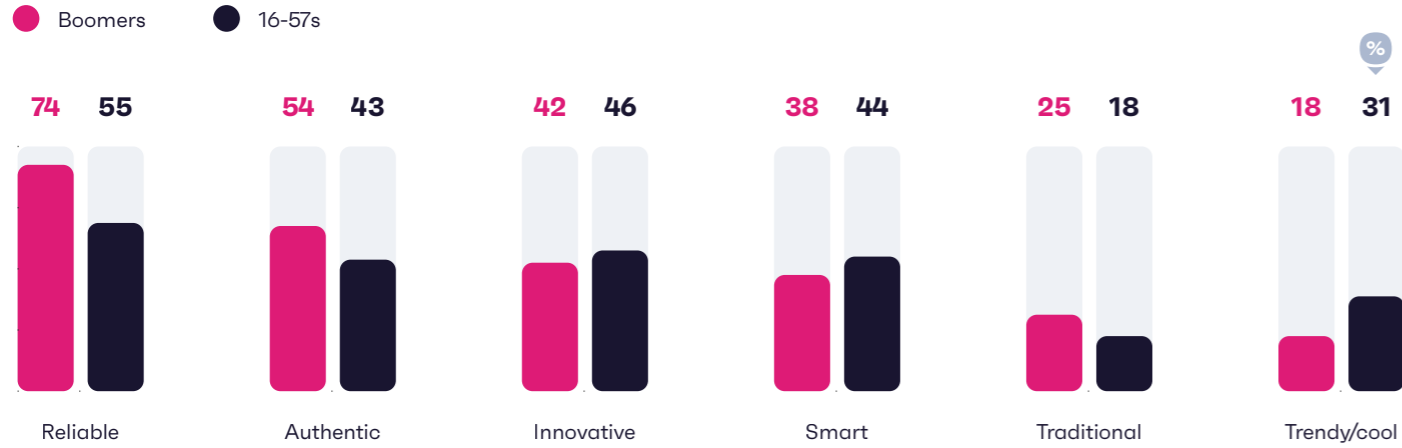
54% of them say it's important that brands be authentic compared to 44% of everyone else, which means that any

initiatives focusing on these values must be genuine to get their attention.

At the end of the day, there is real risk in being performative with CSR initiatives. Much more than younger age groups, baby boomers will go out of their way to support brands that offer them great customer service, and this suggests they're more prone to backlash against businesses that fail to treat them with respect or support their values.

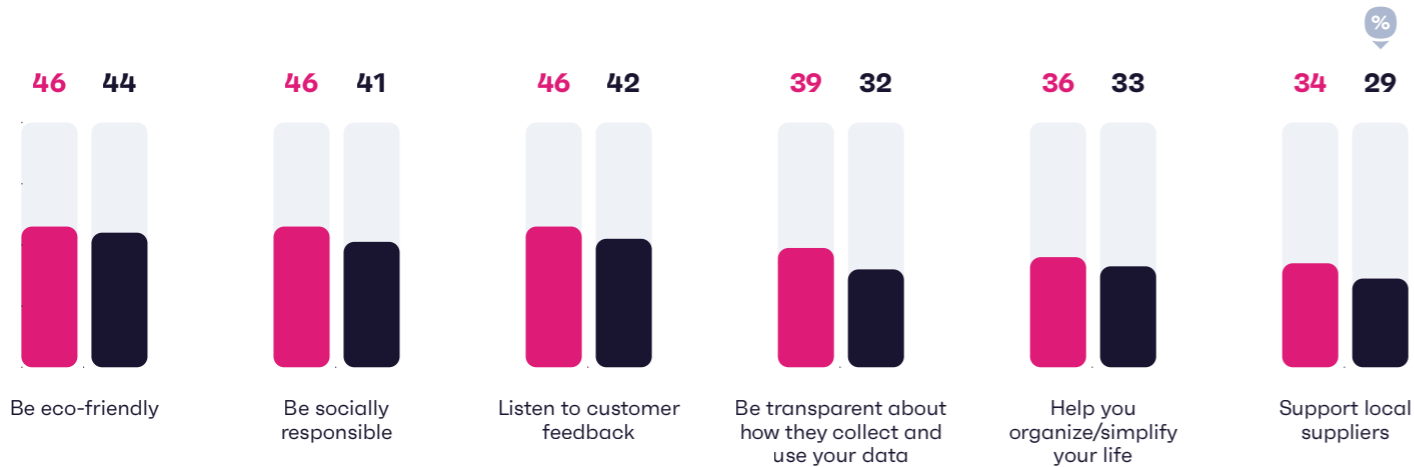
## Brand qualities

% who want brands to be the following



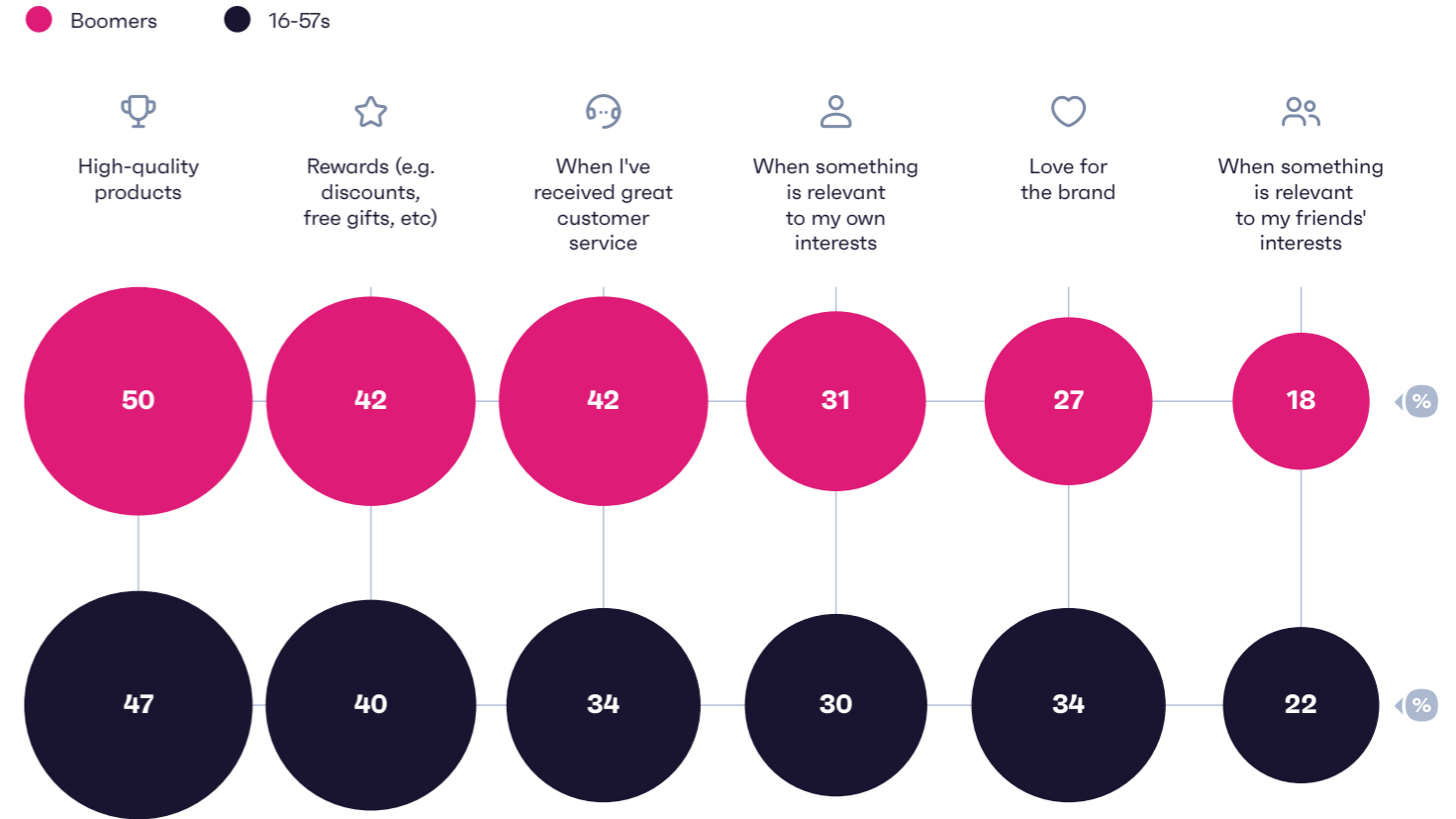
## Brand actions

% who want brands to do the following



## How to enlist them as advocates online

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



GWJ Core Q1 2021 | 13,875 baby boomers aged 58-64 and 167,192 internet users aged 16-57

# The environmentally conscious boomer

According to **multiple studies**, baby boomers are quietly driving a large portion of the financial support that eco-friendly movements around the world receive.

Younger consumers often attract **attention** for showing strong sustainability attitudes, especially on the backs of protests by high-school and college students organized by Greta Thurnberg since 2019.

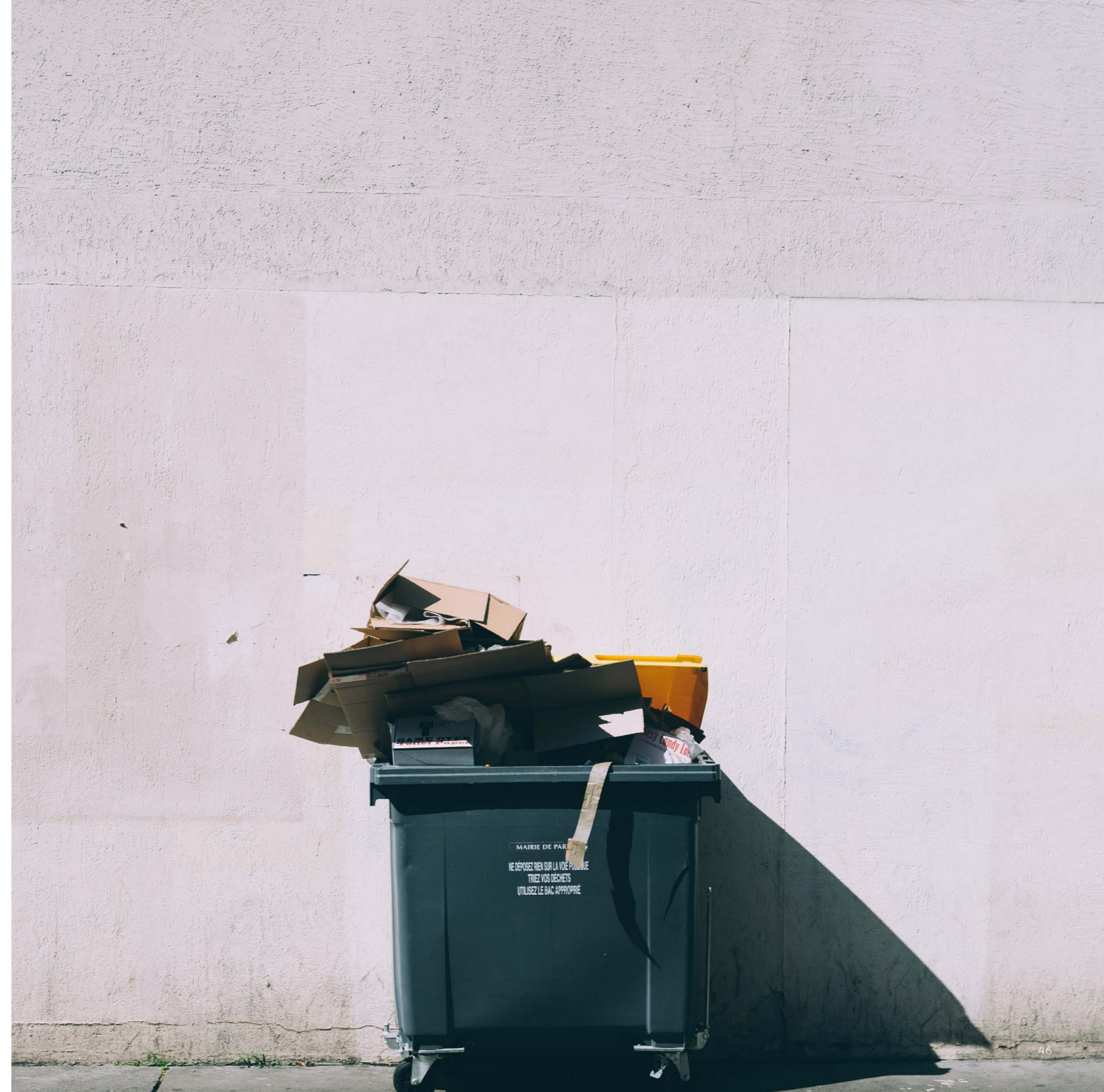
However, this perception that

older generations are actively hindering climate innovation – one that brought us the term “**OK Boomer**” – goes against what we see in the data itself. More than any other generation, baby boomers are the most likely to take specific individual actions to curb their environmental impact.

50% of boomers say they always try to recycle, compared to just 33% of Gen Zs and 37% of millennials, and in the U.S. they are the most

likely generation to say they’re actively reducing the amount of single-use plastic they use.

The fact that they have the largest wealth accumulation of any other age group makes them a very important audience to environmental fundraising efforts in the future. Buying into the **inter-generational feud** against boomers may be doing more harm than good when it comes to our collective sustainable future.



# Appendix

1 Where is your household located? • What is your yearly household income before tax or any other deductions? • Who lives in your household? • What best describes your marital status?

2 Do you currently have any of the following? • What kind of savings/investments do you have?

3 On an average day, how long do you spend on social media? • On an average day, how long do you spend online on a mobile?

4 In the last week, which of these have you done online?

5 How often do you do each of the following? (regularly) • Which of the following describes why you use an ad

blocker? • Which of the following do you feel describes you?

6 Which of these types of website or apps have you used in the last month?

7 Which of the following do you feel describes you? • What are your main reasons for using social media?

8 How often do you visit or use these services? (monthly)

9 Which platforms/services do you use to do the following?

10 Which of the following devices do you own?

11 Which of these would you say is the most important device you use to access the internet, whether at

home or elsewhere?

12 Which of these smart home devices do you own? (smart home product) • Which of these smart home devices do you own?

13 How do you typically find out about new brands and products? • Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? • When shopping online, which of these features would most increase your likelihood of buying a product?

14 Which of these items are you/your household thinking about purchasing in the next 3-6 months?

15 Which of these do you want brands to be? • Which of

these things do you want brands to do? • What would most motivate you to promote your favorite brand online?



# Notes on methodology

## Introduction

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

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).

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.

## Our research

Each year, GWI interviews over 688,000 internet users aged 16-64 across 46 markets. Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles and digital behaviors. We source these respondents in partnership with a number of industry-leading panel providers.

## 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.

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

## Sample size by market

This report draws insights from GWI's Q1 2021 wave of research across 47 countries, with a global sample of 181,067 respondents;

● of which 13,875 are baby boomers

	Argentina	1,491	80		Morocco	926	7
	Australia	3,958	518		Netherlands	1,254	182
	Austria	1,234	129		New Zealand	1,257	149
	Belgium	1,286	173		Nigeria	1,021	8
	Brazil	5,477	243		Philippines	3,087	52
	Canada	4,734	668		Poland	2,015	235
	China	24,997	843		Portugal	1,241	92
	Colombia	2,507	78		Romania	1,238	126
	Denmark	1,519	177		Russia	3,495	400
	Egypt	1,743	21		Saudi Arabia	1,581	17
	France	5,038	578		Singapore	2,705	230
	Germany	4,972	621		South Africa	1,496	73
	Ghana	1,067	10		South Korea	1,888	208
	Greece	1,256	72		Spain	4,947	475
	Hong Kong	1,825	139		Sweden	2,465	321
	India	13,527	223		Switzerland	1,485	170
	Indonesia	5,046	51		Taiwan	2,279	143
	Ireland	1,240	118		Thailand	3,728	90
	Israel	1,506	129		Turkey	2,020	53
	Italy	5,054	526		UAE	1,760	9
	Japan	4,856	632		UK	9,997	1,282
	Kenya	1,020	4		U.S.A.	24,279	3,252
	Malaysia	2,785	122		Vietnam	2,496	37
	Mexico	4,269	109				

## Mobile survey respondents

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

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GWI's

Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this [document](#).

## Internet penetration rates: GWI versus ITU figures

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
















































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

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as

Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. This is the case throughout much of LatAm, MEA and Asia Pacific.

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

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

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

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# 1/4

**buyers say blogs are very influential when researching a new product**



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