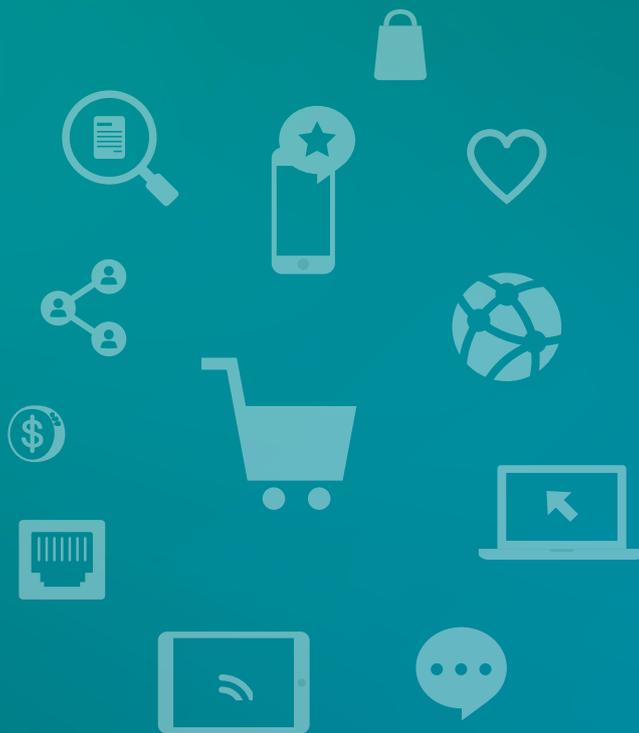


GWI Commerce Summary

Q2 2014



GlobalWebIndex's quarterly report on the
latest trends in e-, m- and t-commerce

Introduction

GWI Commerce is where GlobalWebIndex presents the very latest figures for online purchasing and other commercial behaviors across a range of devices.

Drawing on data from our Q1 2014 wave of research, we offer insights on:

- The role that PCs, laptops, mobiles and tablets are playing in the online purchasing process
- The popularity of online buying at a category level
- The nature of the consumer's online purchase journey
- The importance of influencers and reviewers

With our data covering 32 markets – representing nearly 90% of the global internet audience – we offer the most up-to-date and comprehensive view of e-commerce behaviors among digital consumers and highlight a number of key demographic, region- and market-specific stories.

In this summary, we provide the key headlines and statistics from the report. For more detailed insights, coverage and implications, please see the full version.

Clients can access further detail on any of the topics covered in this report through our pre-cut data packs available to download in the Insight Store, or by analyzing them against target audiences in our PRO platform.

For trends at a national level, please see our new Market Reports – each of which contains a section dedicated to e-commerce.



Notes on Methodology

Each year, GWI interviews more than **170,000 internet users across 32 markets** – making it the largest on-going study into the digital consumer instigated to date.



AMERICAS

US // Canada // Mexico
// Argentina // Brazil

EMEA

UK // Ireland // France // Germany
// Italy // Spain // Netherlands //
Poland // Turkey // Russia // Sweden
// Saudi Arabia // UAE // South Africa

APAC

China // Hong Kong // Singapore //
India // Indonesia // Japan // Malaysia //
Vietnam // Thailand // Taiwan // South
Korea // Australia // Philippines

Research is conducted in quarterly waves, each of which **has a global sample size of more than 40,000 internet users**. In each country, we typically interview between 3,000 and 4,000 people per year, with a larger sample size in key markets such as the UK and the US (30,000 each). Data is collected in the last six weeks of every quarter, ensuring it is as up-to-date as possible.

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).

This data is used to calculate the **universe estimates** which we present throughout this report. Universe figures are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

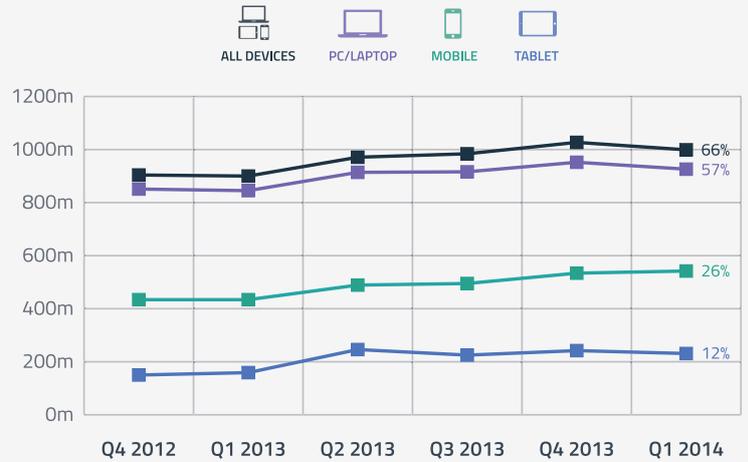
M- and T-Commerce Rising

- Overall, **66% of internet users aged 16-64 are now buying products online each month**. That's close to a billion people who are currently engaging with e-commerce across GWI's 32 countries – representing a 52% rise in buyer numbers since 2011 and illustrating the activity's truly global scale. If current trends continue, **our forecasts shows that the figure will pass the 1.5 billion mark by 2018**.

- PCs/laptops remain dominant devices for buying online (57%)**, but significant minorities are using mobiles (26%) and tablets (12%). It's these two devices which are also seeing the fastest rates of growth – numbers have risen by 25% and 54% respectively since the end of 2012.

- Multi-device commerce has established itself as a major trend:** over a quarter have used a PC/laptop and a mobile or tablet to make purchases.

ONLINE BUYING BY DEVICE



Question: Which of the following activities have you done online in the last month, via a PC/laptop, mobile phone or tablet? Purchased a product online // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet users aged 16-64

Amazon and eBay Command Global Audiences

- Amazon has achieved truly worldwide reach: **just under 50% of global internet users aged 16-64 say they have visited it within the last month**.

- North Americans (73%) are the most likely of all to use Amazon, with the **UK (77%), Germany (76%) and the USA (75%)** being the biggest individual markets.

- In terms of user numbers, though, there are more people visiting Amazon from China each month than there are from the US. India, Brazil and Indonesia also represent major markets for Amazon – a trend which is often overlooked in results from passive web analytics due to the large numbers of internet users who connect via **VPNs or Proxy servers (and are thus incorrectly geo-allocated to mature markets like the US** where the servers in question tend to be based).

- In Q1 2014, 36% of internet users aged 16-64 visited **eBay** in some form. Engagement is highest in Europe (47%) and North America (44%), but in no region does it fall below a quarter. Figures for monthly visitors in the US (44%) are outpaced by markets like Germany (73%), India (64%) and the UK (63%).

VISITORS TO AMAZON

Global

46%

By Region

North America

Europe

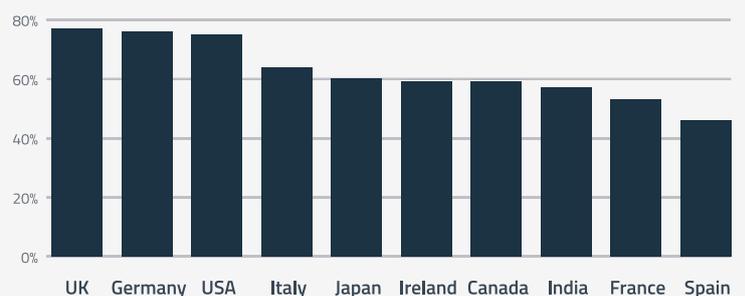
Asia Pacific

Middle East and Africa

Latin America



Top 10 Countries

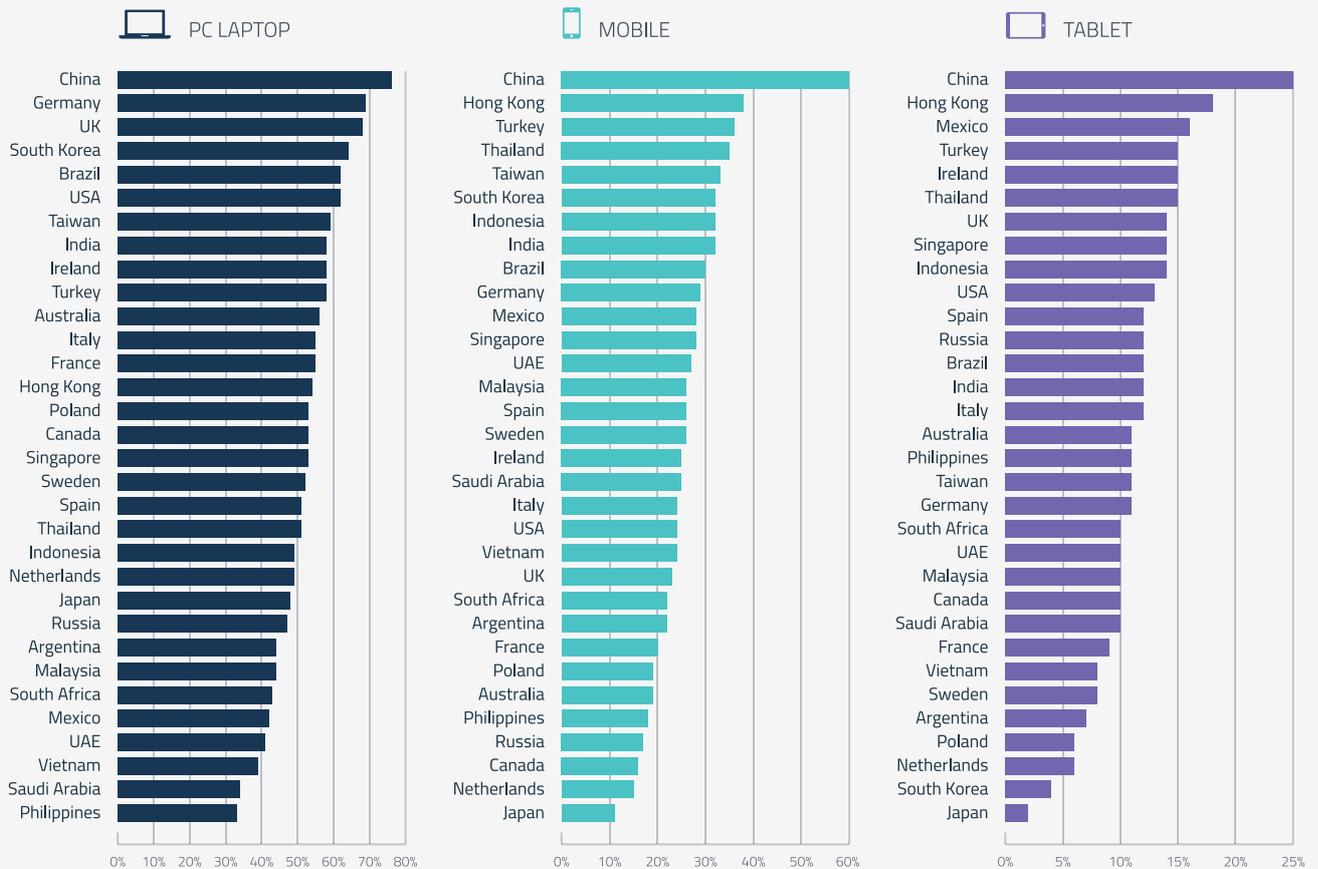


Question: Which of the following sites/applications have you visited in the past month via a PC/Laptop, Mobile or Tablet? // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet users aged 16-64

China Dominates all Devices

- Some **82% of the online population aged 16-64 in China** are buying products **via the internet** on a monthly basis, corresponding to a mighty 380 million people. In terms of overall audience size, the US, India, Brazil, Indonesia, Germany, Japan, Russia, the UK and South Korea complete the list of the top 10 biggest e-commerce markets.
- China is ahead on all devices:** 76% of its internet users are buying via PCs/laptops, 60% via mobiles and 25% via tablets.
- For PCs/laptops, it is mature internet nations which follow China** – including Germany (69%), the UK (68%) and the USA (62%). The picture is quite different for **mobiles, though, where fast-growth countries feature much more prominently** (e.g. Turkey at 36%, Thailand at 35% and Indonesia at 32%).

DEVICES USED TO BUY ONLINE, BY COUNTRY



Question: Which of the following activities have you done online in the last month, via a PC/laptop, mobile phone or tablet? Purchased a product online // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet users aged 16-64

Younger People Showroom as Older People Embrace Webrooming

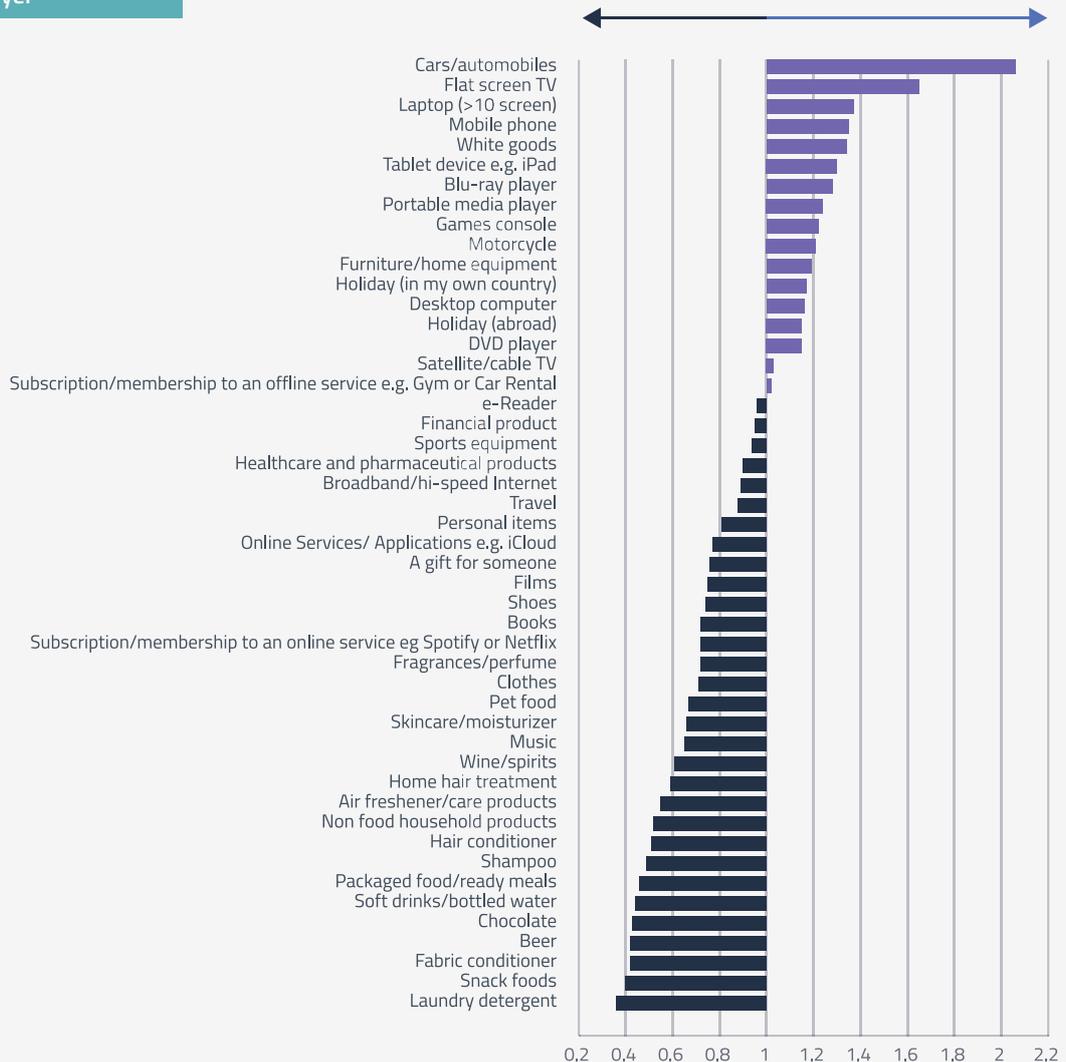
- **Clothes, shoes, gifts and books are the most popular online purchases**, with a significant degree of “showrooming” taking place. This trend is happening in virtually all of GWI’s countries but – looking at clothing as an example – it is most widespread in **mature markets like Sweden, the UK, Germany and the US**. It is least pronounced in places such as Turkey, the Philippines, the UAE, South Africa and Russia, with Saudi Arabia being the only country in which there is no evidence of clothes being showroomed at all.
- Mobiles are the most researched products, reflecting the importance of “**webrooming**” for bigger-ticket items. Again, this behavior is **most pronounced in some of the more mature markets – led by Japan, Canada and the US**.
- While showrooming is most popular among younger age groups, the propensity to **webroom increases directly in line with age** – suggesting that older groups are still a little more resistant to buying online than their younger counterparts.

RATIO OF ONLINE PURCHASERS TO RESEARCHERS, BY CATEGORY

HOW TO READ: For cars, there are 2.06 online researchers for each online buyer

MORE ONLINE PURCHASERS THAN RESEARCHERS – likely to be impulsive, low-value, habitual or “showroomed” products

MORE ONLINE RESEARCHERS THAN PURCHASERS – likely to be high-value, major purchases where online research is impacting offline purchases

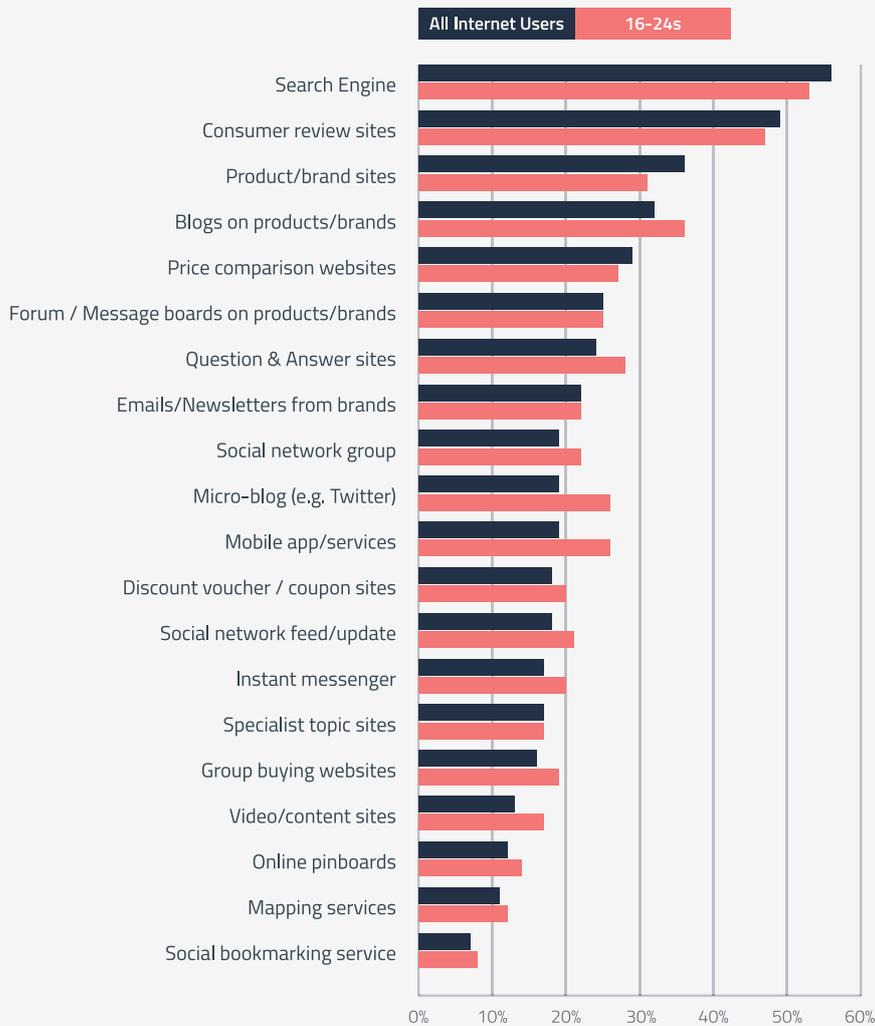


Question: Looking at the list of products and services below, which of the following have you purchased online in the past six months? And which of the products and services below have you researched online prior to purchasing? // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet Users aged 16-64

Usage of Search Engines Increases with Age

- When online consumers are actively looking for more information about a brand, product or service, it is **search engines which are the biggest go-to point**. Globally, 56% say they use them for the purposes of research, a behavior which peaks in Germany (72%), Sweden (65%) and Australia (63%).
- **Usage of search engines increases in line with age** – from a low of 53% among 16-24s to a high of 63% among 55-64s.
- 16-24s over-index strongly for using sources such as blogs, apps, social network updates and video/content sites; in a sense, then, older consumers remain the most wedded to “traditional” research sources, while younger ones are the most likely to have embraced newer channels.

PRODUCT RESEARCH CHANNELS



Question: Which of the following online sources are you primarily using when you are ACTIVELY looking to find out more information about brands, products, or services? // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet Users aged 16-64



Jason Mander
Head of Trends

E: jason@globalwebindex.net // T: +44 20 7731 1614
A GlobalWebIndex, Bedford House, 69-79 Fulham High
Street, London, SW6 3JW, England

www.globalwebindex.net