

Megatrends: Digital Living. The Next Billion Internet Users

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INTRODUCTION

Key findings

Internet access is a necessity for global consumers

Developing and emerging countries still lag in internet connectivity

Almost three billion people remain offline across Asia Pacific and Middle East and Africa

Country profile: India

Country profile: China

Country profile: Pakistan

Country profile: Indonesia

Country profile: Nigeria

Driving trends

DRIVING TRENDS: THE RISING GLOBAL MIDDLE CLASS

Steady economic growth in emerging markets fuels connected middle class

Rising incomes fuel a sizeable higher-income middle class in emerging economies

Country profile: China sees substantial increases in middle-income households

Country profile: India's economic growth fuels sizeable increase in middle class

Rising internet usage and online shopping fuel opportunities in the digital economy

DRIVING TRENDS: AGEING CONSUMERS

Internet connectivity for the ageing generation is a strategic governmental priority in China

Case study: China's e-commerce platform JD.com provides first 5G smartphone for seniors

Percentage of Households with Access to Internet, by age group

Percentage of Households with Access to Internet, by age group

Generations have different digital habits

DRIVING TRENDS: URBAN CONSUMERS

Urbanisation will drive the next billion internet users

Population growth and rural consumers moving to cities fuel urban, connected populations

Country profile: India's urban centres will boost the number of internet users

Country profile: Pakistan to see the fastest growth of its urban population

US shows strongest growth in internet users among advanced economies

CONCLUSION

The next billion internet users: Implications for businesses

Opportunities and challenges

Case studies: Tech giants are investing in developing countries' digital infrastructure

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