GWI Brand Summary

Q2 2014

GlobalWebIndex's quarterly report on the latest trends in how consumers are engaging and interacting with brands

Introduction

GWI Brand is where GlobalWebIndex presents the very latest figures for brand engagement.

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

- How consumers are discovering and researching products - both online and offline
- The most popular types of brand interactions
- Social forms of engagement
- What drives people to advocate brands and products online

With our data covering 32 markets – representing nearly 90% of the global internet audience – we offer the most up-to-date and comprehensive view on how consumers are behaving in the online space, drawing out a number of commercial implications and market-specific stories.

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 brand engagement.

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).

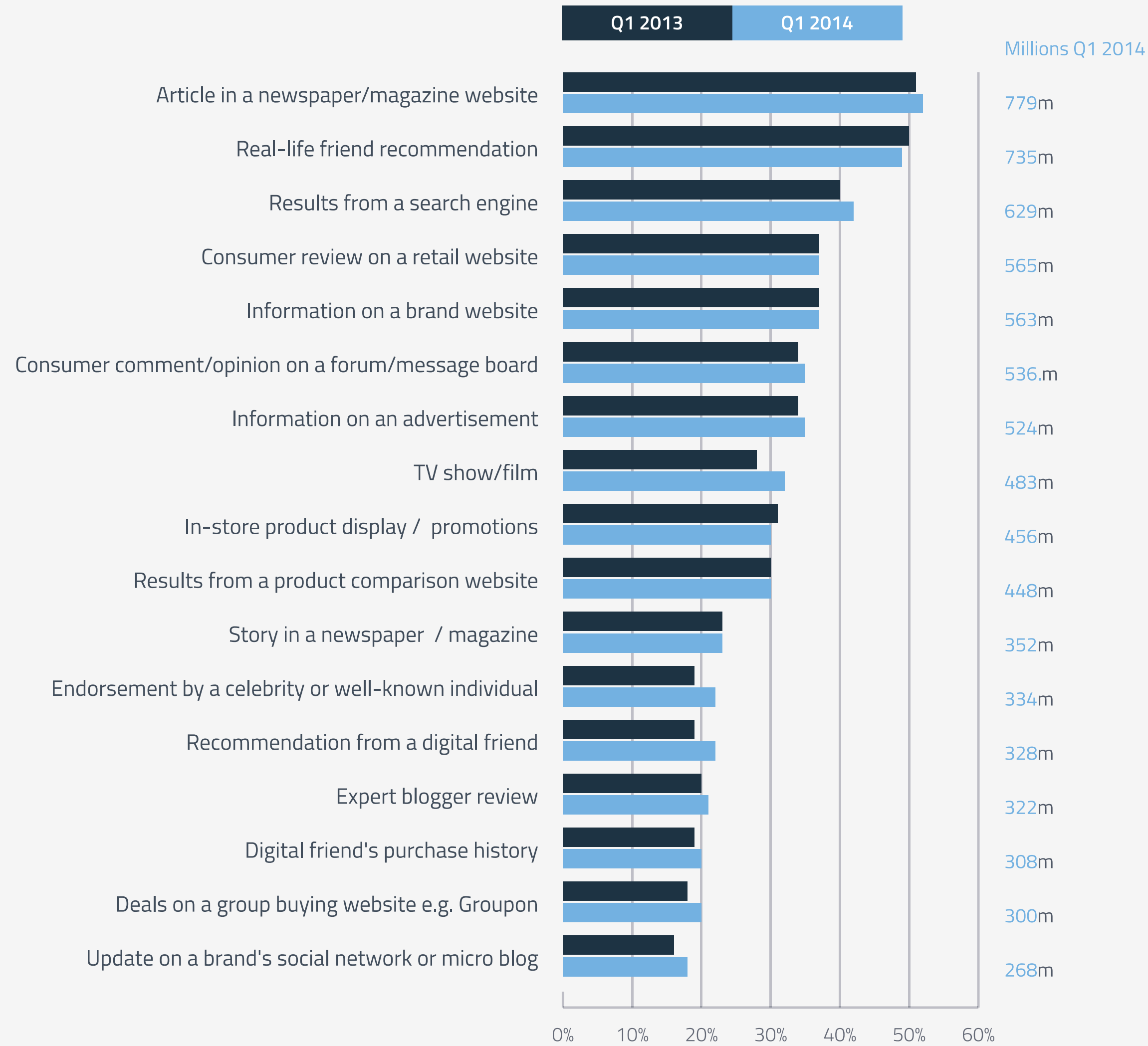
This data is used to calculate the **universe estimates** which we present throughout this report. Universe figures are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

50% Discover New Products through Word-of-Mouth Recommendations

▪ **Word-of-mouth** remains a hugely influential source of product discovery: nearly half (49%) of the online audience say that they hear about new brands and products through recommendations from friends. **Online articles** (52%) and search engines (42%) play important roles here too.

▪ Beyond these top discovery sources, **younger groups are typically the most engaged with "newer" channels like social network updates, blogs and digital recommendations** – as are consumers in fast-growth markets. In contrast, those in North America, Europe and the older age groups are often the most engaged with more "traditional" sources (e.g. in-store displays and physical adverts / print press).

BRAND DISCOVERY



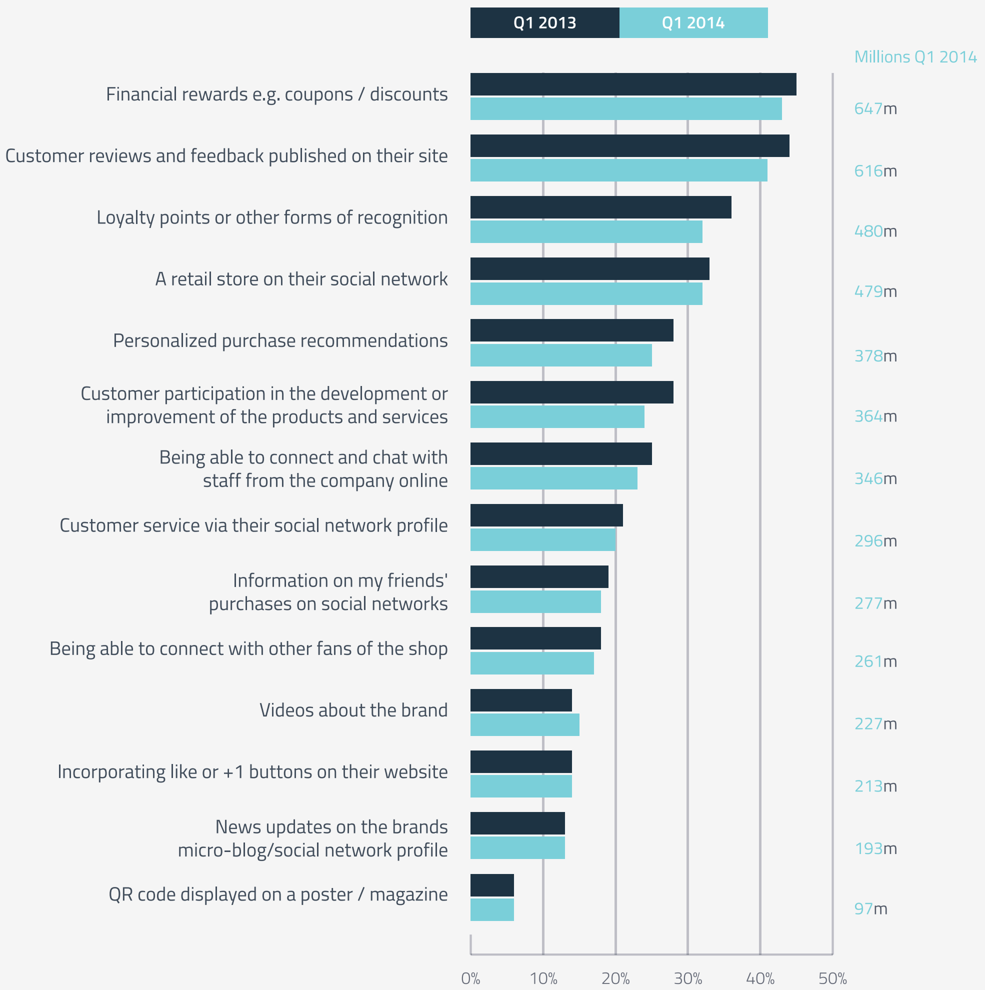
Question: In which of the following ways are you most likely to find out about new brands, products, or services? ///
Source: GlobalWebIndex Q1 2014 /// **Base:** Internet Users aged 16-64

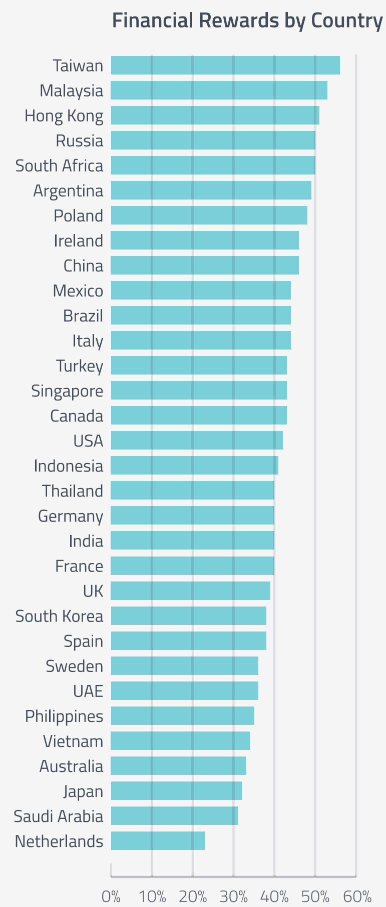
Rewards and Consumer Reviews are Key Purchase Drivers

▪ Within the online purchase journey, it is a **financial reward which exerts the biggest influence over the likelihood of someone committing to buy.** Globally, over two fifths (43%) say that this has a positive impact – something which is especially pronounced within a number of APAC countries and which is more marked among women than men. Ever greater personalized targeting is likely to boost the appeal of this still further.

▪ Elsewhere, it's clearly significant that the provision of **customers reviews and feedback** is only just behind financial rewards (41%). For those making purchases online, this remains a vital form of reassurance and it's striking just how consistent the figures here are in terms of age, income, gender and region.

PURCHASE DRIVERS





Question: Which of the following online activities from a brand are most likely to positively influence your consideration to purchase? ///
Source: GlobalWebIndex Q1 2014 /// **Base:** Internet Users aged 16-64

Social and Content-Driven Interactions are Major Touchpoints

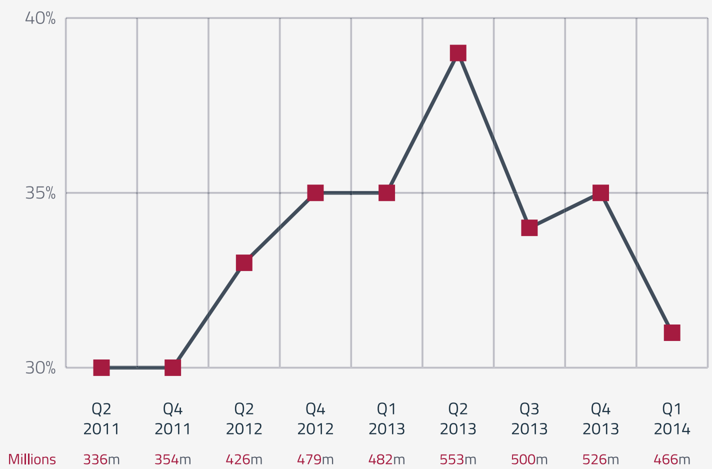
▪ **Interactions based around social networks or content have become major touchpoints.** Globally, just under a third have "liked" a brand within the last month, while nearly a quarter say they have watched a branded video or visited a brand's social networking page/group.

▪ However, after a period of growth in 2012 and early 2013, figures from the latter half of 2013 onwards suggest that **"liking" a brand is a behavior which is beginning to lose some of its popularity.** This is being driven by more passive forms of networking, the shift of some social activities to messaging apps and a degree of fatigue among some users (see *GWI Social* for more on this).

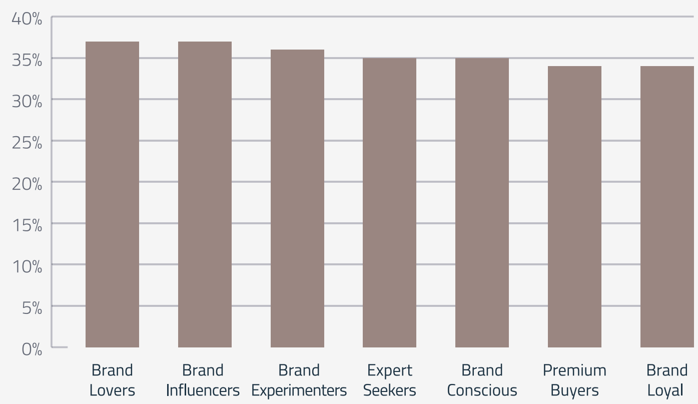
▪ Typically, **internet users are at least twice as likely to be engaging with brand-relevant behaviors on Facebook as they are on platforms like Twitter or Google+.** Beyond "liking" a brand, it is sharing branded photos (19%) and videos (16%) or asking product-related questions to both friends (16%) and the public (13%) which are some of the most important actions.

▪ As we discuss further in *GWI Device*, social interactions via mobiles and tablets are growing at the fastest rates. However, PCs and laptops are still dominant forces here; most mobile and tablet users are still connecting via these devices too. So, while a quarter of internet users have clicked the Facebook "like" button via a PC or laptop, smaller percentages have done this via mobiles (13%) or tablets (6%). This reflects **the highly multi-device nature of internet usage** in the 2010s; people are much more likely to be going online via a range of access points instead of abandoning one in favor of another.

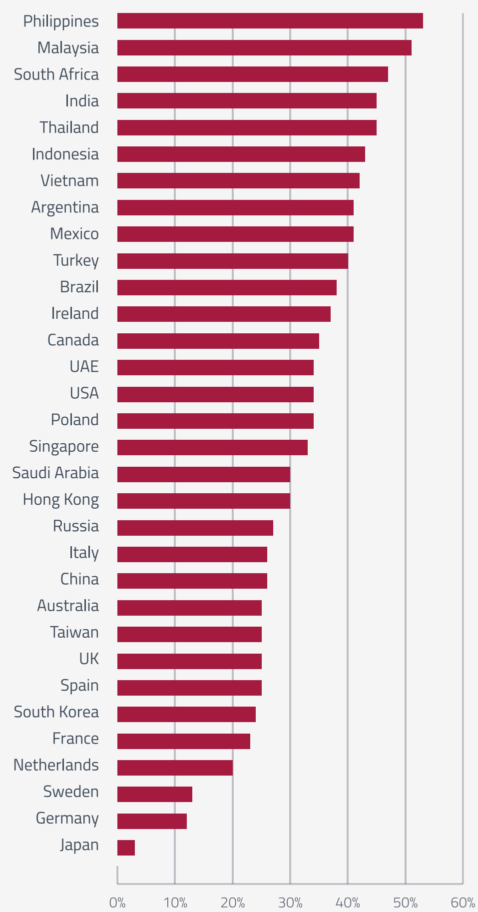
BRAND "LIKERS"



Q1 2014 **by Audience**



Q1 2014 **by Country**



Question: Which of the following brand-related actions have you done in the past month? Liked a brand/product ///
Source: GlobalWebIndex Q1 2014 /// **Base:** Internet Users aged 16-64

Brand Talk

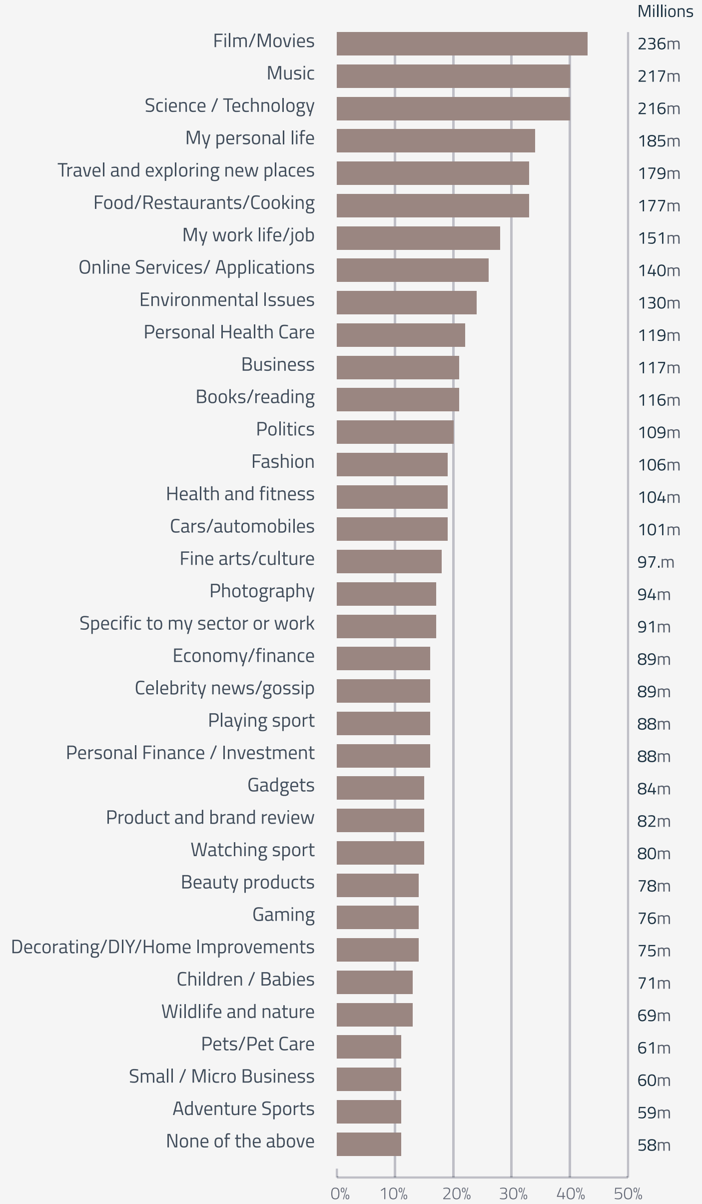
▪ The blogosphere represents a major conversation outlet: **36% of internet users aged 16-64 saying that they've written on their own blog within the last month.** That represents a global audience of nearly 550 million people, illustrating just how much potential advocacy can take place in this space.

▪ The popularity of this activity varies significantly between regions and markets. **China tops the list** – where more than 50% of the online population are blogging each month – but the figures pass the 40% mark in Turkey, Thailand, Indonesia, Saudi Arabia and South Korea. Regionally, blogging is most widespread in APAC (45%) and least common in North America (19%). It's important to understand the implications of this in terms of audience size: nearly 400 million of the world's bloggers are in APAC, making this group more than 7 times bigger than the equivalent in any other region.

▪ There are also strong demographic effects at work; men (39%) are more likely to be blogging than women (32%), with **16-24s (40%) and 25-34s (45%) being the most active age groups.**

▪ Although just 15% of this audience say that they're writing product and brand reviews on their blogs, this still corresponds to more than 80 million people. And with the sheer diversity of the topics that people are discussing, it's also of course possible for brand-related conversations to take place elsewhere too.

BLOG TOPICS



Question: Thinking about when you are writing your blog, what kind of topics do you cover? /// **Source:** GlobalWebIndex Q1 2014 /// **Base:** Bloggers aged 16-64 globalwebindex

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

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www.globalwebindex.net