
AFFLUENT CONSUMERS

EXAMINING THE ATTITUDES AND
DIGITAL BEHAVIORS OF AFFLUENT
CONSUMERS

AUDIENCE REPORT

2018





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Introduction

GWI Audience reports examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audiences in question compare to the overall internet population. In this report, we place the spotlight on Affluent Consumers.

This report focuses on:

DEMOGRAPHICS AND LIFESTYLES | from their demographics to their attitudes and interests, what are the defining characteristics of this group?

DEVICE | what are the most important devices and device brands to this group, and how do they access them?

SOCIAL MEDIA USAGE | which social platforms do Affluent Consumers prefer and why do they use them?

ENTERTAINMENT | how much media does this group consume, online and offline? Are they downloading or streaming music and TV?

COMMERCE & BRAND ENGAGEMENT | how many are shopping online each month and how does this audience discover and interact with brands while online? What can brands do to appeal to an Affluent Consumer?

DEFINING AFFLUENT CONSUMERS

GlobalWebIndex's Social Grading Segmentation ranks respondents based on their answers to a number of questions relating to their lifestyles, professional lives and personal circumstances. Respondents in each country are divided into five quintiles – with the 1st quintile containing those of the highest social grade. **Affluent Consumers are defined as the 1st quintile in each market.** This means that Affluent Consumers scored the most highly across characteristics relating to wealth, educational achievement, working status, vacations, device ownership and car ownership. For more information on GWI's Social Grading Segmentation, please download this document.

To re-create this audience access our Audience Builder on the Platform

Name:	Affluent Consumers
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Social Grading Segmentation

1st Quintile

+ ADD AN ATTRIBUTE

CLICK HERE

Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex'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.

OUR RESEARCH

Each year, GWI interviews over 350,000 internet users aged 16-64. 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**. 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).

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.

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.

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.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex 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 ACROSS GWI'S MARKETS

GlobalWebIndex'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.

This table provides the latest estimates on internet penetration (defined as the number of internet users per 100 people) from the International Telecommunication Union for each market that GlobalWebIndex conducts online research in. Please note that this will reflect internet penetration among the total population, and that the figure among 16-64s is likely to be higher.

INTERNET PENETRATION RATES

ITU INTERNET PENETRATION METRIC 2016

Argentina	70.2	Netherlands	90.4
Australia	86.5	New Zealand	88.5
Belgium	86.5	Nigeria	25.7
Brazil	59.7	Philippines	55.5
Canada	89.8	Poland	73.3
China	53.2	Portugal	70.4
Egypt	39.2	Russia	76.4
France	85.6	Saudi Arabia	73.8
Germany	89.6	Singapore	81.0
Ghana	34.7	South Africa	54.0
Hong Kong	87.3	South Korea	92.7
India	29.5	Spain	80.6
Indonesia	25.4	Sweden	91.5
Ireland	82.2	Taiwan	79.7
Italy	61.3	Thailand	47.5
Japan	92.0	Turkey	58.3
Kenya	26.0	UAE	90.6
Malaysia	78.8	United Kingdom	94.8
Mexico	59.5	United States	76.2
Morocco	58.3	Vietnam	46.5

SAMPLE SIZE BY MARKET

SAMPLE SIZE

Number of respondents in each market that are Affluent Consumers*

Argentina	298	Netherlands	242
Australia	249	New Zealand	240
Belgium	250	Nigeria	105
Brazil	455	Philippines	296
Canada	457	Poland	236
China	1528	Portugal	255
Egypt	259	Russia	452
France	454	Saudi Arabia	239
Germany	464	Singapore	299
Ghana	147	South Africa	303
Hong Kong	241	South Korea	244
India	586	Spain	428
Indonesia	356	Sweden	251
Ireland	241	Taiwan	235
Italy	455	Thailand	304
Japan	331	Turkey	298
Kenya	136	UAE	239
Malaysia	305	UK	1472
Mexico	297	USA	3036
Morocco	128	Vietnam	315

This report draws insights from GlobalWebIndex's Q2 2017 wave of research across 40 countries, which had a global sample size of 89,392 (with 72,892 surveys completed on PC/laptop/tablet and 16,500 surveys completed on mobile). Among this sample, there were 17,126 Affluent Consumers.

Key Insights

Affluent Consumers are early tech adopters and multi-device users.

They use a wider range of devices than the average internet user and switch between screens throughout the day and for different activities. Engaging them across all these devices and in different formats is key to building brand relationships.

Build personal relationships with Affluent Consumers based on brand-consumer dialogue.

In their purchasing and brand advocacy habits, status is important for these consumers, as is having insider knowledge of brands. They consider themselves to be premium buyers, and will associate with brands that help them achieve this image.

Social is a crucial brand touchpoint and product research channel.

Social media rivals online reviews and search as a brand research channel, and Affluent Consumers are happy to engage with brands and advocate them in the social space. This group averages almost 2 hours 30 minutes on social daily.

Expert influencers are important information sources for this audience.

Over half of Affluent Consumers state that they tend to seek an expert opinion before purchasing and they are significantly more likely to be following entrepreneurs / business people via social media.

Frustration with online advertising is driving ad-blocker usage among Affluent Consumers.

Over half of Affluent Consumers are ad-blocking in some form each month. But it's the excessive nature of online advertising, not personalization initiatives, that are driving this trend. Highly tailored content could engage this group's willingness to associate with brands.

DEMOGRAPHICS AND LIFESTYLES

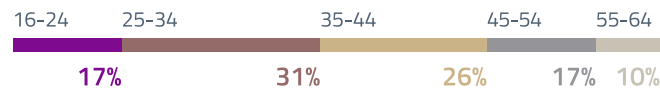
Profiling Affluent Consumers

GENDER

% of online Affluent Consumers who are...



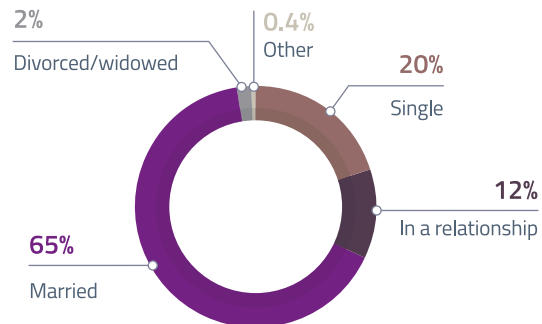
AGE



PARENTAL STATUS



RELATIONSHIP STATUS



The Affluent Consumers of the world's internet population are most likely to be male (56%), 25-34 (31%) and married (65%) with children (67%). As our social grading segmentation is designed to allow a true country-by-country comparison, there are key regional differences to understand. The overall figures for age are skewed somewhat by the high rates of Affluent Consumers in Asia Pacific, where the internet population tends to be relatively affluent and young. By contrast, in North America, 45-54s form the largest age group among the Affluent (26%), while in Europe it's the 35-44s (24%).

Affluent Consumers report holding more wealth and assets than the typical internet user, with 29% owning two or more properties outright and 34% owning two cars. Luxury brands perform well in car ownership, as Affluent Consumers are over twice as likely to own an Audi or a Mercedes-Benz. This is a group keen to keep fit, as 3 in 4 of them say that they exercise regularly.

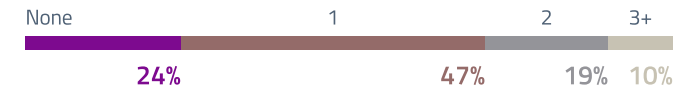


The average age for an Affluent Consumer is 34 in MEA, 35 in APAC, 40 in Europe, and 42 in North America

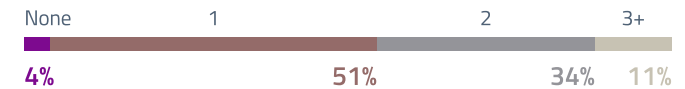
WEALTH

% of Affluent Consumers who own the following

PROPERTY OWNERSHIP (OUTRIGHT)



HOUSEHOLD CAR OWNERSHIP



WEALTH TYPES

Cash/savings/pension	83%
Stocks/shares	44%
Real estate/property	40%
Mutual/Managed Investment Funds	37%
Gold	30%
Bonds	21%
Annuities	17%
Art/antiques	10%



Question: How many houses/properties do you own? // How many cars does your household own? // What kind of savings/investments do you have? | **Source:** GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64 (car ownership, type of savings/investments)/16,449 Affluent Consumers aged between 16-64 (property ownership)



Platform:
Attitudes and Lifestyle > Property Ownership

EXPLORE THE DATA

Attitudinal Segmentation

Our research segments internet users based on their attitudinal responses in our survey (an explanation for which can be found here). We assign respondents to various groups based upon attitudes ranging from world-views, privacy concerns or brand engagement traits, to new technology and purchasing preferences.

This is an image-conscious group, more likely than average to fall into the Status Seeker segment (meaning they tend to buy the premium version of a product, and would describe themselves as affluent/brand-conscious) and the Cosmopolitan segment (meaning they are interested in travel and exploring new cultures/ideas). That only 9% fall under the Economical category (those who seek value above all else in their purchases) shows that this audience prioritizes brand status over price-savviness.

Affluent Consumers see themselves as prioritizing status over price

Given the assets which Affluent Consumers possess, it is unsurprising that **their biggest over-indexes for personal interests are business, investment, and finance**. Moreover, they act on those interests online, being 45% more likely to have used a banking app in the last month. As our section on devices will discuss, Affluent Consumers are early adopters of new technology, and their engagement with banking and financial services online presents an opportunity for the fintech sector.

TOP 5 OVER-INDEXES FOR PERSONAL INTERESTS

% of Affluent Consumers who say they are strongly interested in the following topics

		INDEX
Business	34%	1.63
Personal finance/investment	41%	1.61
Economy/finance	38%	1.60
Politics	29%	1.50
Cars/automobiles	39%	1.45

ATTITUDINAL SEGMENTATION

% of Affluent Consumers who fall under the following segmentations

		INDEX
Privacy Conscious	65%	1.07
Status Seeker	52%	1.52
Altruist	50%	1.33
Aspirational	44%	1.25
Cosmopolitan	31%	1.70
Technophile	30%	1.21
Informed	24%	0.85
Image Conscious	23%	1.17
Economical	9%	0.59
Spontaneous	7%	0.87



Question: Here is a list of topics that may interest you. Can you please indicate which of these you are strongly interested in?

Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64 (attitudinal segmentation) / 16,449 Affluent Consumers aged between 16-64 (personal interests)



Platform:

Attitudes and Lifestyle > Attitudinal Segmentation

EXPLORE THE DATA

DEMOGRAPHICS AND LIFESTYLES

Travel

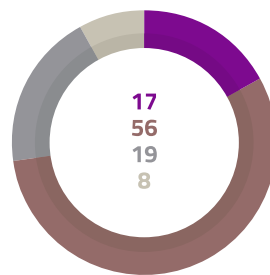
Our survey also segments users according to how frequently they engage in certain activities (in this case, travel). We assign respondents to groups ranging from 'Regulars' to 'Non-Engagers' (A full explanation can be downloaded here). For Affluent Consumers, travel is pivotal for business and pleasure. 17% of them take regular vacations abroad, and 19% take regular business trips overseas.

Frequent travel is consistent worldwide; in all regions, **Affluent Consumers are more than twice as likely to regularly travel abroad for work or holidays**, with the Middle East/Africa and North America four times more likely to do so than the average. When it comes to flying, Affluent Consumers over-index for premium carriers like Etihad, Qatar Airways, Singapore Airlines, and Virgin Atlantic.

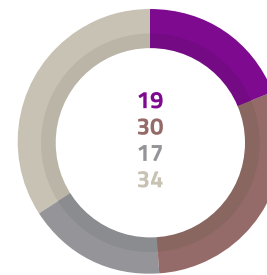
TRAVEL

% of Affluent Consumers who travel with the following frequency

● Regulars ● Semi-Regulars ● Occasionals ● Non-Engagers



VACATIONS
ABROAD



TRAVEL FOR
BUSINESS ABROAD

TOP 5 OVER-INDEXES FOR AIRLINES USED

% of Affluent Consumers who have flown with the following airlines at any time



Question: Which of these best describes how often you do each of the following activities?
Have a vacation abroad/Travel for business abroad // Have you flown with any of these airlines?
Source: GlobalWebIndex Q2 2017 | **Base:** 16,449 Affluent Consumers aged 16-64 (vacations abroad, travel for business abroad)/8,434 Affluent Consumers aged 16-64 (airlines used)



Platform:
Attitudes and Lifestyle > Frequency of Travel

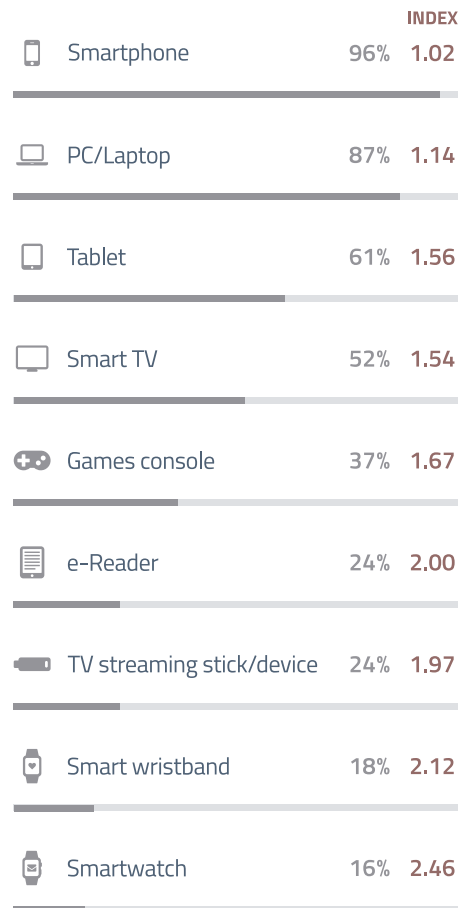
EXPLORE THE DATA

DEVICE

Device Ownership

DEVICE OWNERSHIP

% of Affluent Consumers who own the following devices



Mirroring the global trend, **smartphone ownership has surpassed PC and laptop ownership among Affluent Consumers**, with a near-universal ownership rate of 96% for mobile phones. There are also above-average ownership rates for tablets (61%), smart TVs (52%) and games consoles (37%). **High levels of ownership for a number of devices shows how Affluent Consumers keep a broad device portfolio**, having on average one more device than the typical internet user.

While smart wristbands (18%) and smartwatches (16%) are not as widely owned as other devices, ownership figures for them are well over twice the global average. This group's portfolio tends to include the latest tech, and **engagement with wearables also suggests an influence of regular exercise on ownership rates**. Given that such devices rely on a strong uptake from early adopters on their first release from consumers able to afford them, this is an encouraging sign for wider adoption of the technology.

INTERNET DEVICES

% of Affluent Consumers who get online via the following devices



AVERAGE NUMBER OF DEVICES OWNED

3.23 Global Average

4.39 Affluent Consumers

Louis Vuitton Enters the Smartwatch Market

Joining TAG Heuer and Montblanc in the luxury wearables market, this summer Louis Vuitton announced their new Tambour Horizon smartwatch, to retail from \$2,490. Powered by Google's Android Wear OS, the Tambour Horizon highlights a growing overlap between Affluent Consumers' preference for well-designed luxury brands, and their desire to own the latest tech.



Question: Which of the following devices do you personally own?

// In the past month, which of these have you used to access the internet?

Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64



Platform:

Device Ownership and Access > Device Ownership

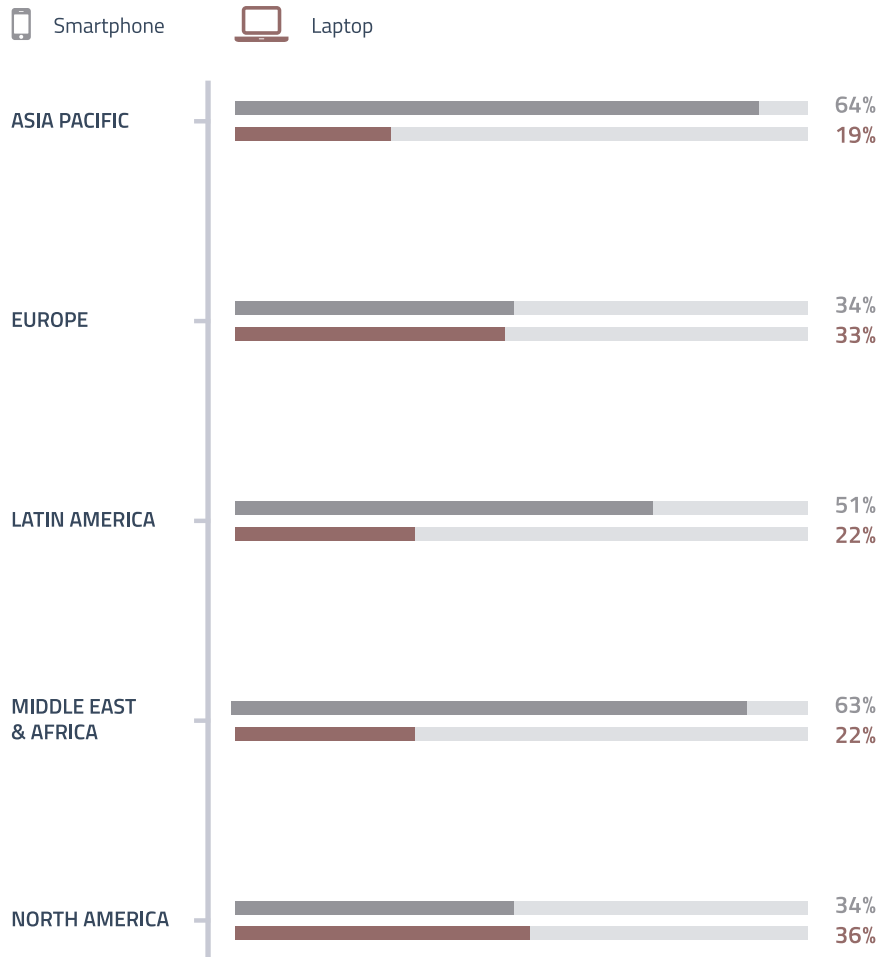
EXPLORE THE DATA

DEVICE

Device Preferences

DEVICE IMPORTANCE

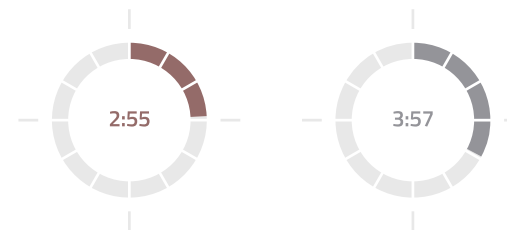
% of Affluent Consumers who say that the following device is the most important for accessing the internet



DEVICE PREFERENCES

Smartphone PC/Tablet/Laptop

Time spent online per day in hh:mm



% share of daily online time



While this group follows the global trend of online activities moving from PC to mobile, **PCs and laptops are not being abandoned, and remain important** – this audience spends 58% of their online time on those devices, compared to 42% on mobile.

Breaking the data down by region illustrates how internet access differs worldwide, even for this multi-device group. Mobiles rise to prominence in **growing markets like Latin America (51%), Asia Pacific (64%), and the Middle East/Africa (63%),** where more

Affluent Consumers identify smartphones as their most important device, reflective of the younger age demographic of Affluent internet users in those markets. **The mature markets of Europe and North America, by contrast, see just as many Affluent Consumers considering their PCs to be as important as their mobiles.** Still, the length of time spent across both devices in all regions highlights how flexibility across devices is crucial in reaching consumers who expect to switch between them with ease.

PCs are most important in mature markets, while mobiles rise to prominence in APAC and MEA



Question: Roughly how many hours do you spend online on mobile or PC/Tablet/Laptop during a typical day? // Which would you say is the most important device you use to access the internet, whether at home or elsewhere?
Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64 (time spent) / 16,449 Affluent Consumers aged 16-64 (device importance)



Platform:
Media Consumption > Time Online on Mobile

EXPLORE THE DATA

DEVICE

Online Privacy Measures

AD-BLOCKING

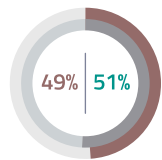
% of Affluent Consumers who block ads at least once a month across the following devices



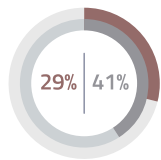
Mobile



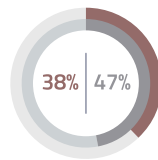
PC/Laptop



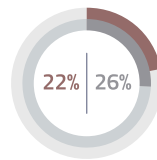
ASIA PACIFIC



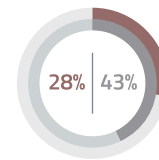
EUROPE



LATIN AMERICA



MIDDLE EAST & AFRICA



NORTH AMERICA

Our attitudinal data reveals that 65% of Affluent Consumers fit the Privacy Conscious profile (defined in our segmentation as internet users who value privacy and worry about loss of personal data) – and this is borne out by their use of online privacy measures. **Half of all Affluent Consumers in APAC block ads on mobile and computer at least once a month**, with the region far ahead for ad-blocking on mobile, the dominant device there.

Ad-frustration explains the most popular motivations for using ad-blockers across all regions, with half of this cohort

describing ads as being annoying or irrelevant. Privacy-related motivations like concern about ads compromising online privacy (28%) or personalization (26%) perform less well, indicating that **consumers in this group are more accepting of tailored advertising content**, or at least, more so than annoyingly excessive ads. The key takeaway for marketers is that **the relationship between brand and consumer should be organic**, capitalizing on this audience's keenness to interact with brands, rather than using anonymous forms of online advertising.

MOTIVATIONS FOR AD-BLOCKING

% of Ad-Blocking Affluent Consumers who cite the following motivations for Ad-Blocking

Too many ads are annoying or irrelevant 50%

There are too many ads on the internet 48%

Ads are too intrusive 46%

Ads take up too much screen space 40%

Ads sometimes contain viruses or bugs 40%



Question: Which of the following have you done in the last month? // Please could you tell us your main reasons for blocking ads while you use the internet?

Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64 / 8,157 Affluent Consumers who block ads on mobile / desktop aged 16-64



Platform:

Device Ownership and Access > Online Privacy Measures

EXPLORE THE DATA

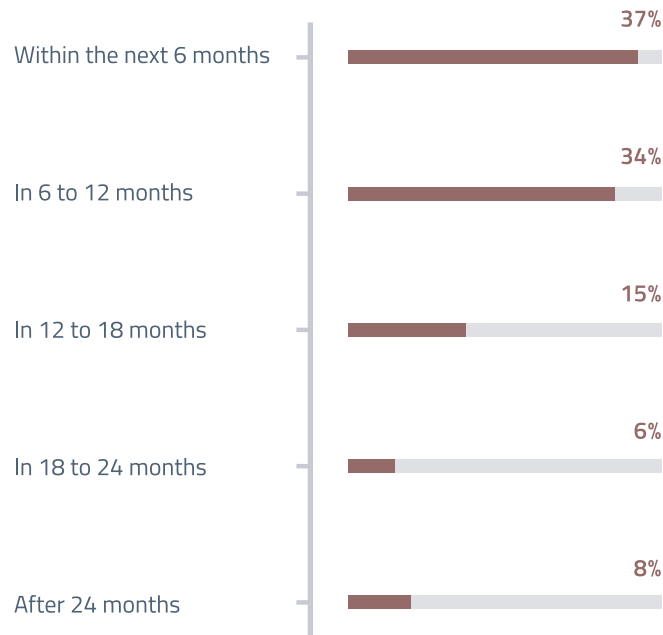
Mobile Brands

37% of Affluent Consumers are planning to purchase a new mobile phone within the next 6 months, a quicker timeframe than the average. Almost 1 in 4 Affluent Consumers have owned their current phone for less than 6 months; as with much of their device portfolio, such a turnaround shows that **Affluent Consumers like to own the latest device models**. This has an impact beyond the initial choice of device; it means **Affluent Consumers are more likely to be able to use technology which requires the most recent mobile operating systems**, like mobile payments.

Although Samsung devices are most popular among Affluent Consumers worldwide, **when it comes to the choice of brand for a consumer's next upgrade, the iPhone pulls ahead of Samsung slightly**. 51% of Affluent Consumers are looking to upgrade to a newer iPhone, compared to 48% for a newer Samsung model, though Samsung holds the advantage in Europe, LatAm, and MEA. Huawei occupies a decent third place in APAC and MEA, with 1 in 5 Affluent Consumers in those markets owning a phone from the Chinese brand. Sony and LG report similar figures in Latin America, showing that the mobile phone market is more than just a two-horse race.

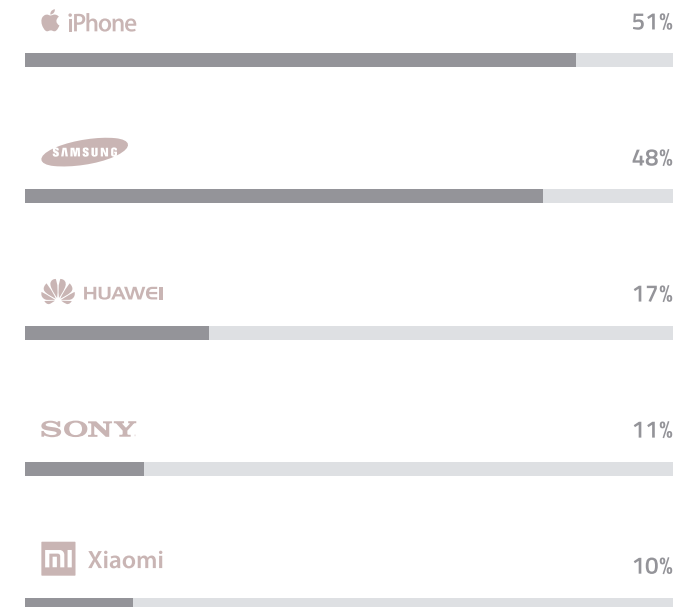
MOBILE BRANDS

% of Affluent Consumers who plan to buy a new phone or upgrade...



CHOICE FOR UPGRADE

% of Affluent Consumers who say the following brands are their top choice for their next phone



Question: When do you plan to buy a new mobile phone or upgrade your existing phone? // Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone?

Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64 (mobile brand ownership) / 16,449 Affluent Consumers aged between 16-64 (mobile brand purchase consideration)



Platform:

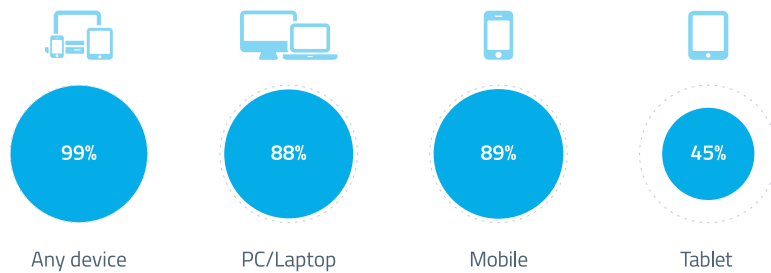
Device Ownership and Access > Mobile Purchase Timeframe

EXPLORE THE DATA

Social Media Engagement

CROSS-DEVICE NETWORKING AMONG AFFLUENT CONSUMERS

% of Affluent Consumers who are engaging with social media services via...



The importance of on-the-go access for social is shown by mobiles (89%) being the most popular device for social networking, though PCs (88%) remain well-used. Affluent Consumers are connected on a wide spread of services; on average, they have two more social media accounts than the average internet user. That they occupy such a wide social portfolio demonstrates a specialized approach to social media, where different networks are used for different purposes. As such, targeting Affluent Consumers on social networks should be sensitive to how they choose to engage with a particular service.

AVERAGE NUMBER OF SOCIAL MEDIA ACCOUNTS

7.64 Global Average

9.68 Affluent Consumers

DAILY TIME SPENT ON SOCIAL MEDIA (hh:mm)

2:16 Global Average

2:24 Affluent Consumers



Affluent Consumers average almost **2 hours 30 minutes** per day on social media



Question: In the past month, which of the following things have you done on the internet on your PC, Laptop, Mobile or Tablet? // On which of the following services do you have an account? // Roughly how many hours do you spend engaging with / connected to social networks or services during a typical day? | **Source:** GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64 (time spent) / 16,449 Affluent Consumers aged between 16-64 (online activities)



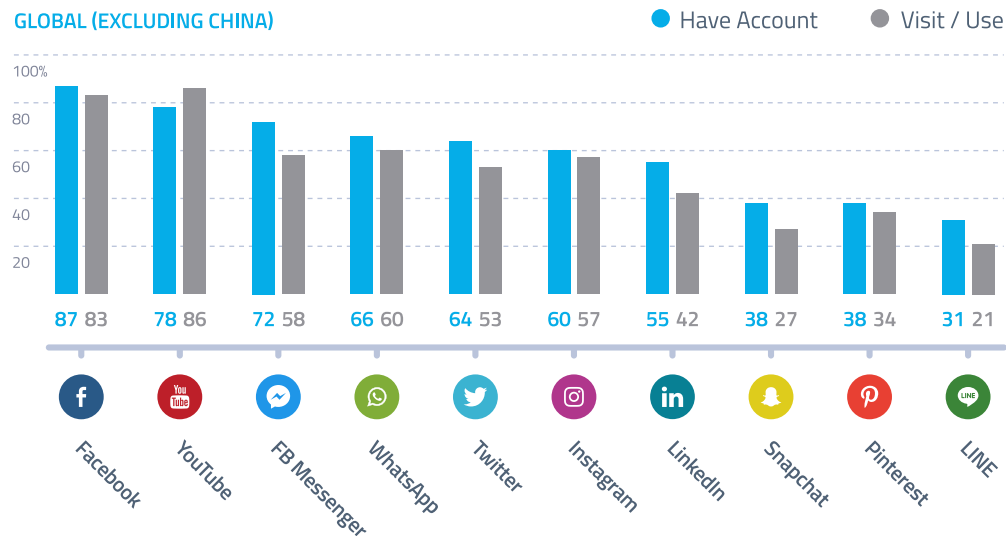
Platform:
Media Consumption > Time Spent on Social Networks or Services

EXPLORE THE DATA

SOCIAL

TOP SOCIAL NETWORKS

GLOBAL (EXCLUDING CHINA)



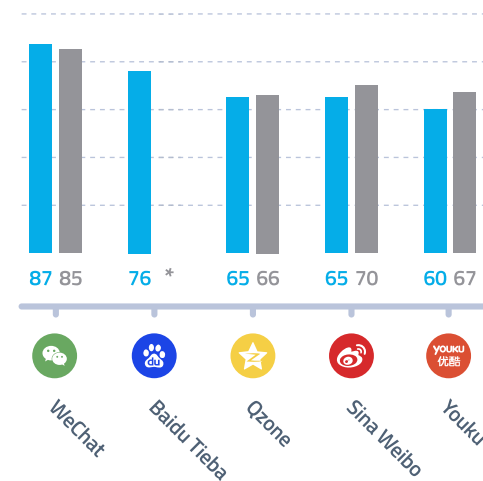
Outside of China, Facebook dominates membership stats for social as 87% of Affluent Consumers are signed up to the network, and 83% have visited in the past month. However, **YouTube is in pole position for site visits**, with 86% visiting. With so many visiting YouTube, Affluent Consumers can be targeted effectively through video content on the service.

Pinterest and Instagram visits see an over-index, which highlights an approach to social which brands can tap into; namely, the appeal of visual search

and content. With this group 22% more likely to have visited a brand's social media page in the past month, and 36% more likely to have uploaded a photo to a brand's page over that time, it's clear that visual content on social is a potentially fruitful touchpoint, especially when targeting this group's desire for status.

In China, WeChat dominates the social media landscape as 87% are members, and 85% have visited the platform in the last month. Qzone

TOP 5 IN CHINA



*GWI does not currently track visitation for Baidu Tieba

(66%), Sina Weibo (70%) and Youku (67%) report high visitation rates, to the extent that they exceed membership on those platforms.

Visual content on social is a key touchpoint for targeting this group's desire for status.

SOCIAL

TOP 5 FOLLOWING ON SOCIAL MEDIA

% of Affluent Consumers who say they prefer to follow these types of accounts on social media



That **43% of Affluent Consumers follow brands they like** and 32% follow brands they are thinking of buying something from illustrates their happiness to engage with brands on social.

LatAm (51%) are the keenest to follow brands they like, with APAC (47%) not far behind. Europe (33%) and North America (35%) see depressed figures, though favorite brands are still the most popular pages to follow. The differing age profile of regional demographics is likely to be at play, as the younger

TOP 5 OVER-INDEXES



Affluent Consumers of emerging markets tend to be more engaged on social.

In all markets, contacts relevant to work hit the top 5, with high over-indexes in Latin America and MEA (where internet users are both nearly 50% more likely to do so). Clearly, then, **social media is frequently used as an accessory of this group's professional life.**



A strong over-index for following **entrepreneurs and business people** reveals this audience's professional social media engagement and their **interest in finance**

Entrepreneurs are the largest over-indexes for pages followed in APAC (79% more likely) and second largest in MEA behind politicians (twice as likely), showing how those regions translate their interest in business into social media engagement. It also shows that expert influencers and opinion-makers can have an impact among this audience.



Question: Who do you follow on social media?

Source: GlobalWebIndex Q2 2017 | **Base:** 16,449 Affluent Consumers aged 16-64



Platform:

Social Media > Types of People Followed on Social Media

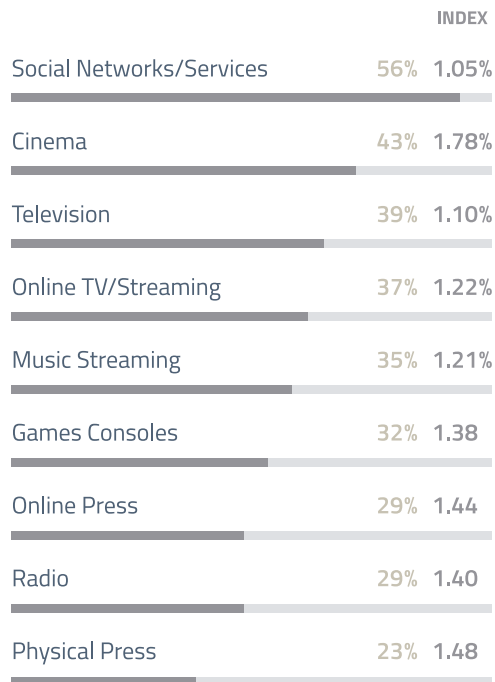
EXPLORE THE DATA

ENTERTAINMENT

Media Consumption

MEDIA CONSUMPTION SEGMENTATION

% of Affluent Consumers who are high/heavy users of the following



Affluent Consumers are prolific consumers of entertainment, particularly on mobile

(A full explanation of our Media Consumption Segmentation can be found here).

Notable is that while Affluent Consumers are 48% more likely to be high or heavy users of physical press, where luxury marketing spend is traditionally focused, it comes at the bottom of our media consumption segmentation. The top spot for social networks is even more pronounced in APAC (59%), MEA (68%) and LatAm (75%), showing where, for sheer time spent at least, Affluent Consumers are focusing most of their attention.

Strikingly, **Affluent Consumers are 78% more likely to be high or heavy users of the cinema.**

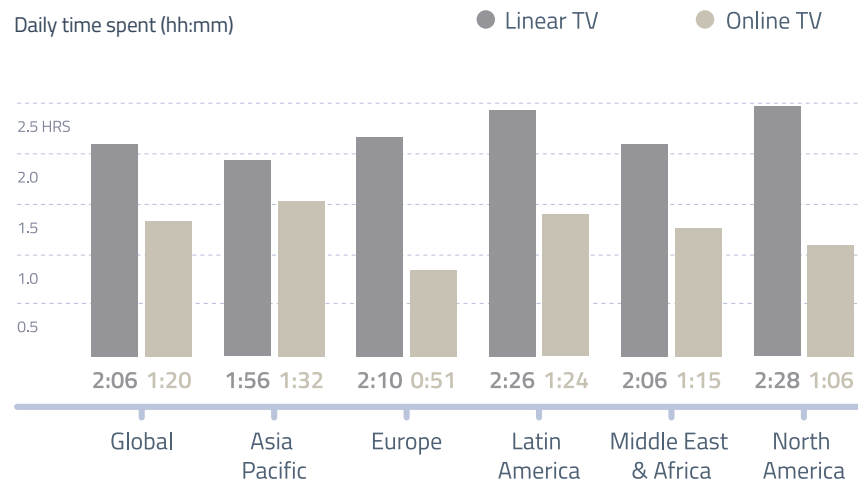
MEA does not contribute to this, as cinemas in that region are few and subject to strict controls in some countries; the popular cinema markets for this audience are APAC, LatAm and North America. The relatively high cost barrier for cinema could explain why it is disproportionately popular with this audience.

Time spent on TV remains strong across the regions, and outperforms social media in Europe and North America. **Affluent Consumers**

are devoting over three hours to television (combining broadcast and online) per day, with linear TV taking over 2 hours of this time. North America takes top spot for daily TV consumed in linear form (02:28 per day), with APAC taking the lead for online viewing (01:32). **While Asia Pacific has the most digitally-minded TV viewers, even there, 56% of TV watched daily happens offline.** Online TV has the slowest adoption in Europe, with it being the only region where less than an hour of TV is watched online per day.

TV CONSUMPTION

Daily time spent (hh:mm)



WEEKLY TV ENGAGEMENT

% of Affluent Consumers who watch the following types of TV on a weekly basis

Watch TV in any form	96%
Watch television live as it is broadcast on a TV channel	87%
Watch a TV channel's catch-up/on-demand service	65%
Watch subscription services such as Netflix	61%
Watch shows that you have recorded from TV	56%



ENTERTAINMENT

Paid Content

Affluent Consumers are more likely to purchase all types of entertainment content online, with movie/TV streaming services (30%) and music downloads (29%) the best performers. However, 71% of Affluent Consumers report using a music streaming service, meaning that, despite their higher income, **they are not opposed to account sharing and accessing music through freemium payment models.**

TOP 5 PAID-FOR CONTENT

% who have paid for the following content in the last month

Movie or TV streaming service	30%
Music download	29%
Music streaming service	28%
Movie or TV download	23%
Mobile app	22%

Affluent Consumers are 51% more likely to have paid for a news service, which shows promise for targeting them as premium-tier buyers, but it's still a low audience figure of 13%. With 46% of this group consuming news on social, convincing them of the value in paying for news content is crucial.

TOP 3 OVER-INDEXES

1.88 A subscription to an online version of a magazine

1.83 Premium web service

1.77 Music streaming service



Affluent Consumers stream music for **17 minutes** more per day than the average internet user



Question: Which of the following types of online content have you paid for in the past month?
Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64



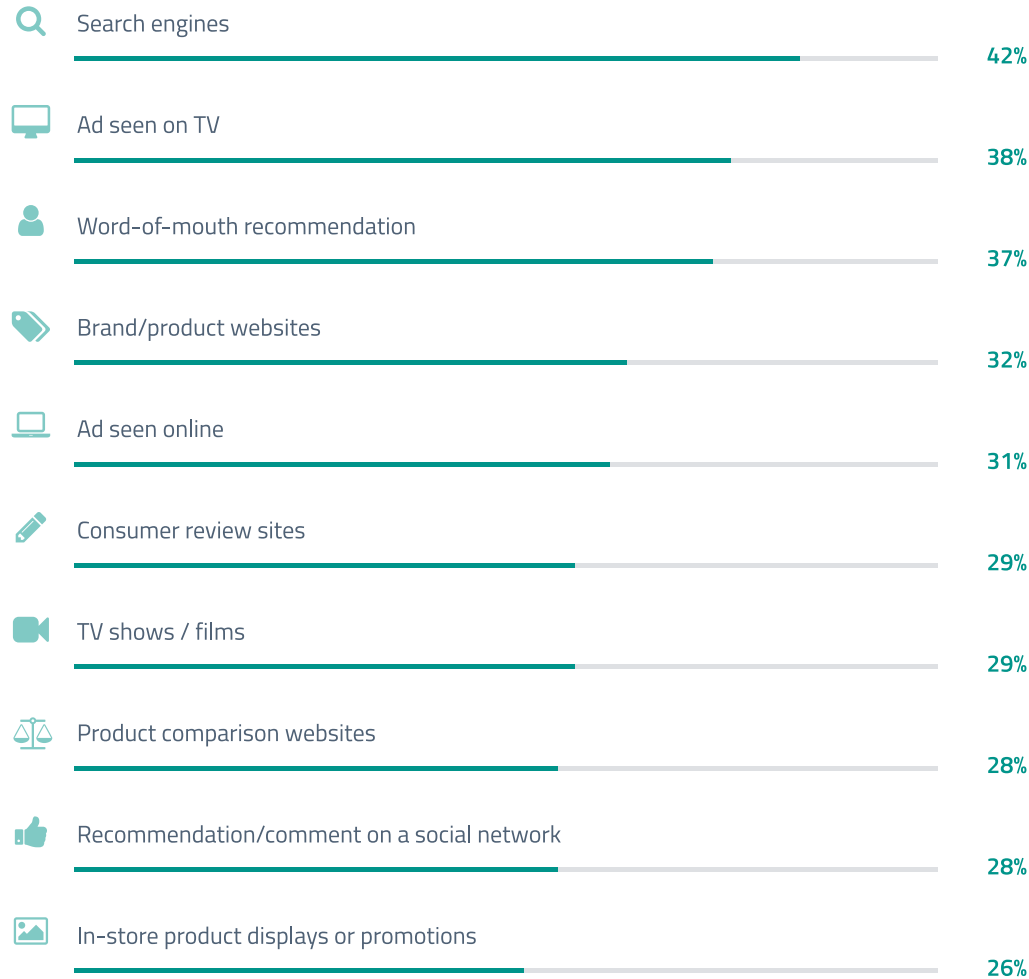
Platform:
Commerce > Digital Content

EXPLORE THE DATA

Brand Discovery

TOP 10 BRAND DISCOVERY CHANNELS

% who say that they find brands via the following channels



Digital brand discovery has overtaken some offline sources, with 42% of Affluent Consumers finding out about brands through search engines, compared to 38% who discover them through TV ads. Despite a greater tendency to ad-block, **31% are still discovering brands through online ads**. Online advertising can still be used judiciously to target this audience.

Affluent Consumers are privacy-conscious, but they are also influenced by online advertising

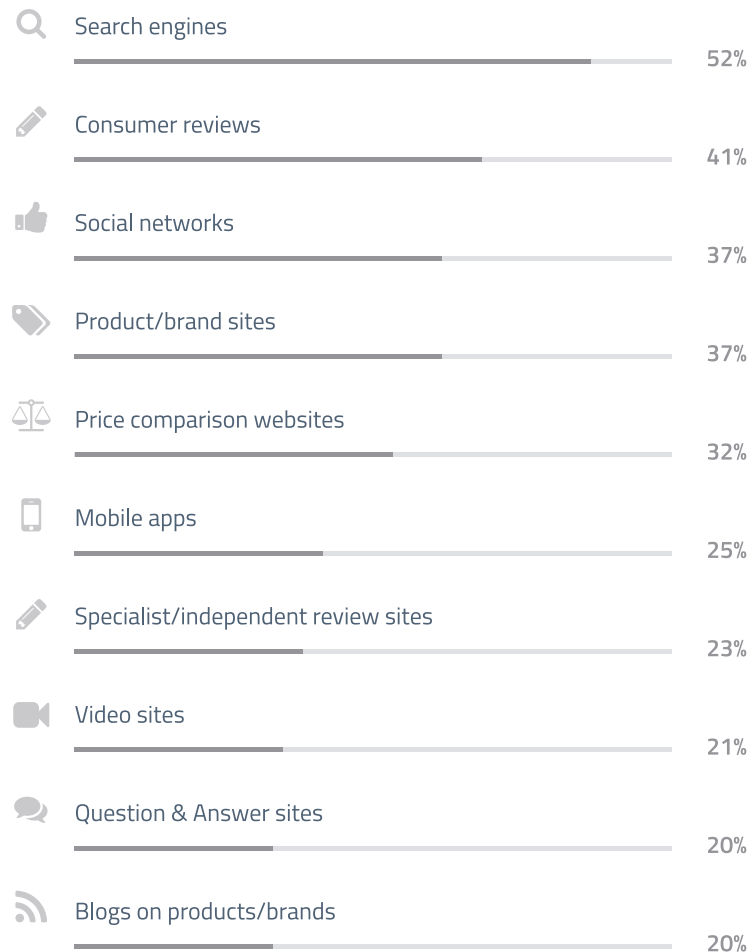
Differences exist for brand discovery on a regional level. Word-of-mouth recommendations overperform in North America, whereas the emerging markets of Middle East/Africa and Latin America report higher figures for ads seen online, regions in which this group spend an hour more online per day compared to the global average. **Online penetration is key for emerging markets and their newly Affluent Consumers**. This is particularly true in the social space – **APAC, LatAm and MEA are all over 50% more likely to discover a brand through an update on their social media page**.

Affluent Consumers over-index for magazine or newspaper ads – where luxury brands traditionally invest in glossy spreads – but with online and social sources performing well overall, these can be fruitful channels to tap into.

Product Research

TOP 10 PRODUCT RESEARCH CHANNELS

% of Affluent Consumers who say that they research products/services via the following routes



Once Affluent Consumers have discovered a brand, they tend to stick to search engines to find out more about them; over half use this method. Social networks (37%) are almost as popular as the more established channel of consumer reviews (41%) globally, showing how this cohort is looking to social almost as much as more established taste-makers. In LatAm and MEA, social networks have already pulled ahead of consumer reviews. Within social, the over-index for visiting the visual platforms of Pinterest and Instagram we discussed earlier informs product research; **micro-blogs and online pinboards are significant over-indexes**. Visual platforms can therefore play a key role in the purchase funnel.

As with other parts of the online purchase journey, regional differences are important. **Specialist review sites are more important in Europe and North America**, where taste-making media have been established over a longer period, and over half of Affluent Consumers state that they tend to seek an expert opinion before purchasing. In the absence of that elsewhere, **APAC's Affluent Consumers are twice as likely to research via micro-blogs**, whereas **LatAM's are 80% more likely to use vlogs**.

TOP 3 OVER-INDEXES

- 1.48 Specialist / independent review sites
- 1.44 Online pinboards
- 1.40 Micro-blogs

Mr. Bags

Chinese blogger Tao Liang, better known as Mr. Bags, is a powerful player in the Chinese luxury market. With hundreds of thousands of followers across Weibo and WeChat, his influence is considerable, and he has used this influence in partnership with luxury brands to review and promote handbags, as well as offering a platform for flash sales. Mr. Bags is a good example of how new taste-making media is forging its own identity online for the growing Chinese middle-class.



Affluent Consumers are **48% more likely** to research brands through **specialist review sites**



Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?
Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64



Platform:
 Marketing Touchpoints > Online Product Research

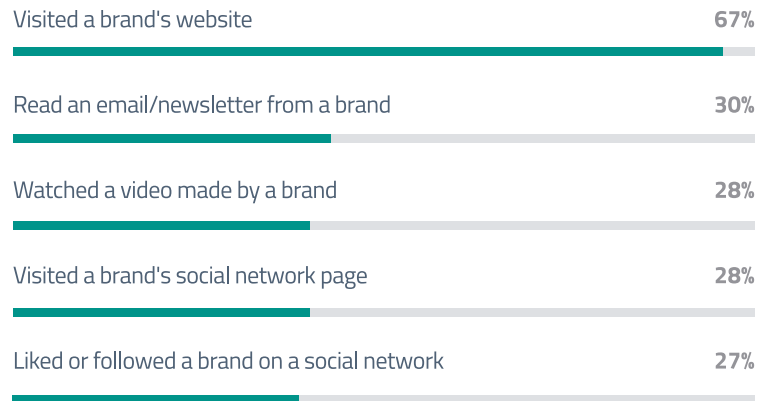
EXPLORE THE DATA

COMMERCE & BRAND ENGAGEMENT

Brand Interactions

TOP 5 BRAND INTERACTIONS

% of Affluent Consumers who have interacted with a brand in the following ways in the last month



TOP 3 OVER-INDEXES

- 1.54** Provided ideas for a new product/service or for a new brand design
- 1.52** Interacted with a brand on a messaging service or app
- 1.49** Chatted with an online customer service agent

Two-thirds have visited a brand's website in the past month, and over a quarter have visited a social network page. Engaging with brands is central to how and why this audience uses the internet, and building a powerful brand presence is crucial to reaching them.

The two largest over-indexes for brand interactions – providing ideas for a new product/service (54% more likely than average) and interacting on a messaging service (52% more likely) – are examples in practice of how this group likes to feel like active participants in their relationship with brands. **Affluent Consumers want to be more than just consumers; they like to have a direct say in the products that are made for them and advertised to them.**



Affluent Consumers like to feel personally involved with brands



Question: Which of the following actions have you done online in the past month?
Source: GlobalWebIndex Q2 2017 | **Base:** 16,449 Affluent Consumers aged 16-64



Platform:
 Marketing Touchpoints > Online Brand Interactions in Last Month

EXPLORE THE DATA

COMMERCE & BRAND ENGAGEMENT

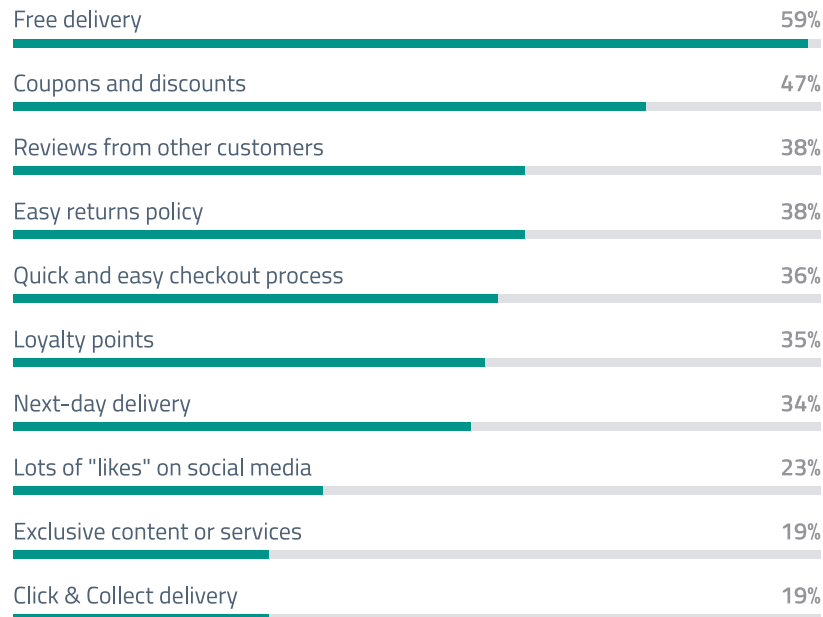
Purchase Drivers

For purchase drivers, the picture is broadly like the global average – **most consumers are motivated by convenience**, with 59% selecting free delivery, and 36% selecting a quick and easy checkout process.

Fittingly for such a socially engaged group, **they over-index for being motivated by the chance to purchase within the social media interface**, and 10% have fulfilled that motivation by clicking on a sponsored Instagram post in the past month. This represents fertile ground for both brands and their social partners to combine posts with purchase portals, if they can be integrated into a frictionless omnichannel strategy. It should be noted that social commerce performs less well as a purchase driver in Europe and North America; it's in APAC, where WeChat has developed a robust in-house platform for vendors, that 1 in 5 Affluent Consumers are motivated by social buy buttons. In any case, with convenience at the forefront of purchase drivers overall, it's essential any integration of social commerce is as frictionless as possible.

ONLINE PURCHASE DRIVERS

% of Affluent Consumers who say the following would motivate them to complete a purchase



TOP 3 OVER-INDEXES

👍 1.41

The chance to buy something on a social network

★ 1.37

Getting access to exclusive content or services

🖱️ 1.33

Click & Collect facilities

COMMERCE & BRAND ENGAGEMENT

Brand Engagement

ALCOHOL

% of Affluent Consumers who drink the following spirits brands monthly

ASIA PACIFIC		EUROPE		LATIN AMERICA		NORTH AMERICA	
Chivas Regal	23%	Jack Daniel's	18%	Johnnie Walker	36%	Smirnoff	17%
Bacardi	20%	Absolut	14%	Jack Daniel's	35%	Bacardi	16%
Johnnie Walker	20%	Smirnoff	14%	Smirnoff	35%	Grey Goose	15%

Data for MEA excluded as alcohol engagement questions are not asked in Egypt, Saudi Arabia, or UAE.

LUXURY FASHION

% of Affluent Consumers who have bought the following luxury fashion brands in the last 1-2 years

ASIA PACIFIC		EUROPE		LATIN AMERICA		MIDDLE EAST AND AFRICA		NORTH AMERICA	
Gucci	22%	Hugo Boss	16%	Ray-Ban	24%	Hugo Boss	14%	Ralph Lauren	12%
Chanel	22%	Tommy Hilfiger	12%	Tommy Hilfiger	22%	Ray-Ban	13%	Michael Kors	10%
Armani	21%	Ray-Ban	12%	Hugo Boss	20%	Chanel	13%	Tommy Hilfiger	9%

Looking at the alcohol brands which Affluent Consumers say they drink monthly, Latin America sees the highest engagement, with scotch brand Johnnie Walker (36%) beating out its American competitor Jack Daniel's (35%) for top spot. The situation is reversed in Europe, where

Jack Daniel's (18%) pips local players Absolut (14%) and Smirnoff (14%). **The importance of strong market presence in all global markets is plain to see.** Pernod Ricard's Chivas Regal scotch (23%) is top in APAC. When it comes to luxury fashion, domestic brands perform

better than alcohol brands in their home markets: 16% have bought from Hugo Boss in the last 1-2 years in Europe, while North America's top 3 (Ralph Lauren, Michael Kors, and Tommy Hilfiger) are all from that region.



Question: How frequently do you drink these alcohol brands? // Have you purchased items from any of these luxury fashion brands?

Source: GlobalWebIndex Q2 2017 | **Base:** 8,434 Affluent Consumers aged 16-64



Platform:
Brand > Engagement

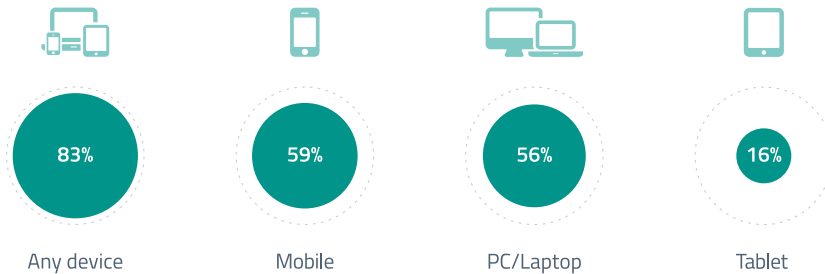
EXPLORE THE DATA

COMMERCE & BRAND ENGAGEMENT

Online Buying

PURCHASING PRODUCTS ONLINE

% of Affluent Consumers who purchased a product online in the last month via...



More Affluent Consumers have purchased a product through their mobile (59%) than their computer (56%) in the past month. Those in LatAm and MEA are buying at the same rate on each device, while APAC and Europe/North America are almost polar opposites, with the former group being truly mobile-first, while the typically older consumers in the West favor PCs. Nevertheless, no one device is used in isolation in any region, so a robust selling platform which works across devices is vital.

Earlier we discussed how Affluent Consumers are more likely to use banking and financial services apps, and their engagement with digital financial

services extends to payments as well. As Affluent Consumers tend to own the latest phone hardware, this gives them more chance to pay for something using mobile technology. **54% of the typically tech-savvy Affluent Consumers in APAC paid for something using their phone last month**, though even in Europe and North America the figure is as high as 3 in 10. QR codes are often thought to be an outmoded technology, but they see elevated levels of engagement in APAC, most likely as a result of their integration with mobile payments. As such, they should be considered as part of any strategy in the region.

Burberry's 'See Now Buy Now' Model

British brand Burberry are a pioneer in luxury digital marketing, having popularized the 'see now buy now' sales model at their fashion shows. Whereas pieces debuted at a show would normally take six months to reach the shelves, the Spring 2017 show allowed consumers to purchase pieces they had seen immediately after they were debuted. Burberry capitalized on the social media buzz surrounding fashion shows and integrated it into an omnichannel strategy.



Question: In the past month, which of the following things have you done on the internet on a PC, laptop, mobile or tablet?/Purchased a product online

Source: GlobalWebIndex Q2 2017 | **Base:** 16,449 Affluent Consumers aged 16-64



Platform:

Online Activities and Behaviors > Activities via Any Device

EXPLORE THE DATA

COMMERCE & BRAND ENGAGEMENT

M-COMMERCE

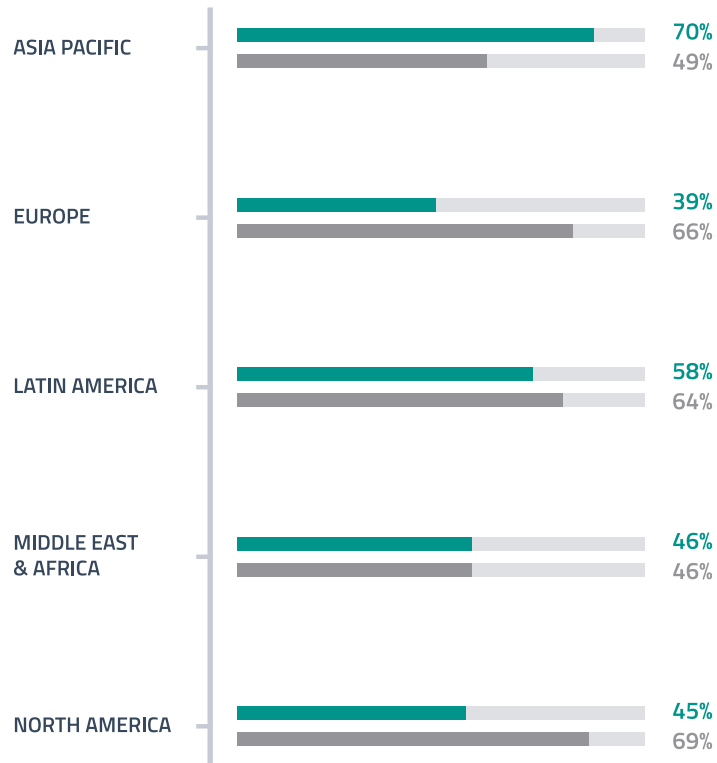
% of Affluent Consumers who have purchased a product online in the past month via the following devices



Mobile



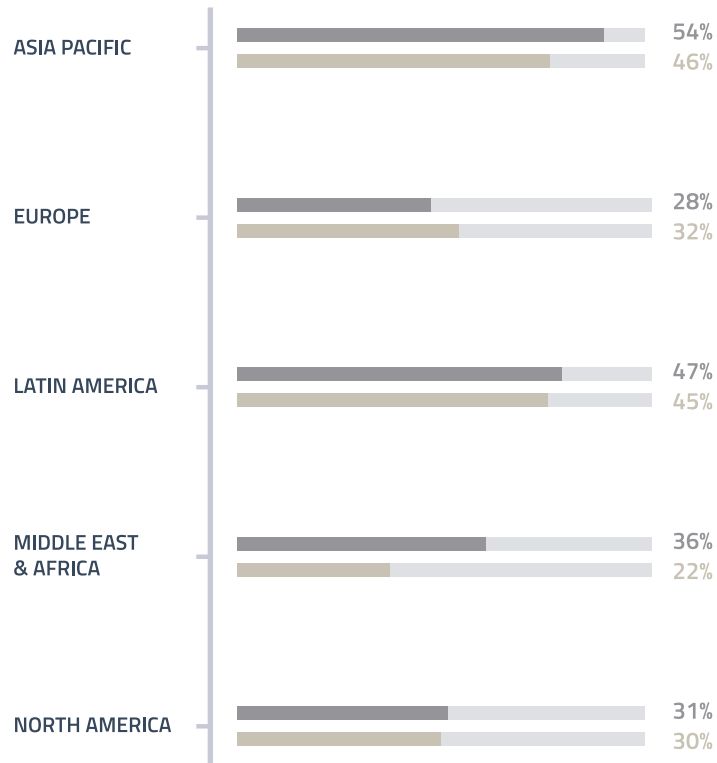
PC/Laptop



MOBILE PAYMENTS

% of Affluent Consumers who have performed the following actions on a mobile in the last month

- Used your phone to pay for an item/service
- Scanned a QR code



Digital access is crucial for this group in all parts of the purchase journey, from discovery, through research to point of sale



Question: In the past month, which of the following things have you done on the internet on a PC, laptop, or mobile?/
Purchased a product online // Which of the following have you done on your mobile phone in the past month?

Source: GlobalWebIndex Q2 2017 | **Base:** 17,126 Affluent Consumers aged 16-64 (online activities)/16,449 Affluent Consumers aged between 16-64 (mobile purchases)



Platform:

Online Activities and Behaviors > Online Activities in the Last Month

EXPLORE THE DATA

Brand Advocacy

Affluent Consumers are 27% more likely to find a brand through consumer review sites, indicating the potential for brands to tap into brand advocacy. **High-quality products (52%) and rewards (43%) are the top performers here**, and suggest ways to harness Affluent Consumers' social media influence, which is especially relevant when **a third of Affluent Consumers say they use social media to research products to buy**. They are 29% more likely to promote a brand on the basis it would enhance their online status, which demonstrates in practice the desire for status this group tends to have.

Affluent Consumers are 28% more likely to promote a brand to enhance their online status

Elsewhere, we see a desire for a tailored relationship with a brand; Affluent Consumers are 29% more likely to promote a brand to instigate a personal relationship, or to get inside knowledge about said brand and its products. Our privacy data showed that this group was more tolerant of personalized marketing, and, coupled with how they wish to interact with brands, it's clear that they are willing to be involved with brands online when made to feel included. Affluent Consumers' engagement with brands goes deeper than simply purchasing their products/services, to the extent that they want to be involved with a wider spread of the brand's activities, whether it be design, publicity, or something else. **This is an audience which can revel in being market influencers**, working directly with brands and advocating their products.

TOP 5 BRAND ADVOCACY MOTIVATIONS

% of Affluent Consumers who would advocate a brand for the following reasons

High-quality products	52%
Rewards (e.g. discounts, free gifts, etc)	43%
When I've received great customer service	37%
Love for the brand	35%
When something is relevant to my own interests	34%

TOP 3 OVER-INDEXES

1.29 When I have a personal/one-on-one relationship with a brand

1.28 When something enhances my online reputation/status

1.27 Access to exclusive content or services



Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q2 2017 | **Base:** 16,449 Affluent Consumers aged 16-64



Platform:
 Marketing Touchpoints > Brand Advocacy

EXPLORE THE DATA

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The questions and data-points featured in this report are available to explore on our 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.

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

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