Global Digital Audience Insights

Consumption and Trends

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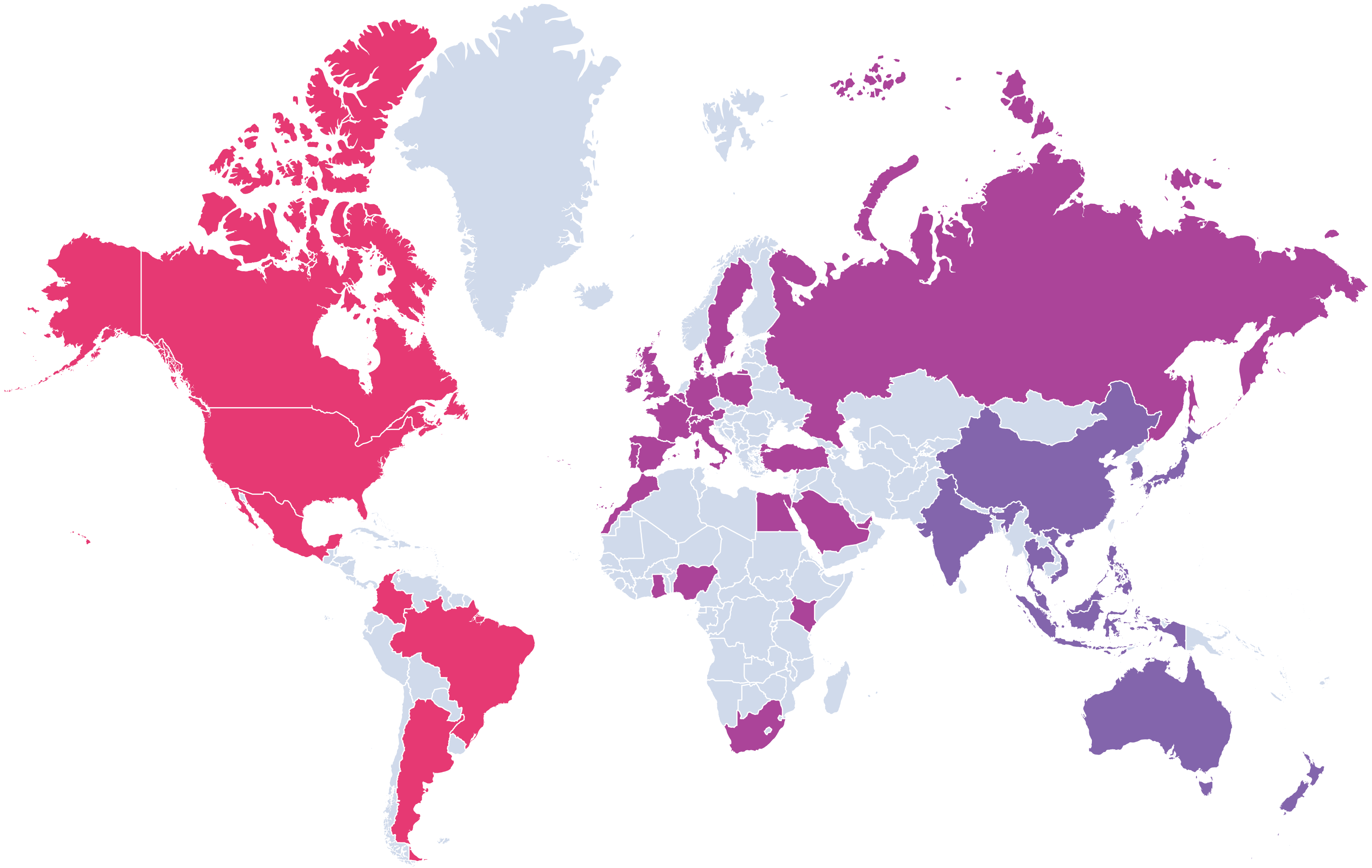
A bit about us…

430K + SURVEYS A YEAR IN 44 MARKETS



AMERICAS

Argentina · Brazil · Canada
Mexico · USA

EMEA

Belgium · Egypt · France
Ghana · Germany · Ireland
Ireland · Italy · Kenya
Morocco · Netherlands
Nigeria · Poland · Portugal
Russia · Saudi Arabia
South Africa · Spain
Sweden · Turkey · UAE · UK

APAC

Australia · China · Hong Kong
India · Indonesia · Japan
New Zealand · Malaysia
Philippines · Singapore
South Korea · Taiwan
Thailand · Vietnam

THE WORLD'S LARGEST ONGOING STUDY ON THE DIGITAL CONSUMER

22 Million Online
Panel Members

44 Markets &
430k+ Surveys a Year

Representative of
2 Billion Internet Users

Quarterly Data
Collection

Immediate
Release

People not
Devices

20,000 Profiling
Data Points

Custom
Capabilities

WITH CONSTANT FLOW OF MARKET, REGION, INSIGHTS REPORTS

20,000+ DATA POINTS: FULL DIGITAL LIFE

Demographics

Attitudes & Lifestyle

Device Ownership & Access

Online Activities & Behaviors

Media Consumption

Social Media

Apps

Commerce

Marketing Touchpoints

Brand

Segmentations

CUSTOM RESEARCH SUPPORT WITH 'RE-CONTACT' AT EACH STAGE

Develop

Test and refine concepts and predict market take-up

Segment

Build customer or audience segmentations

Profile

Understand and profile your target market

Plan

Understand the purchase journey

Activate

Integrate measurement and targeting across your business

Measure

Measure brand performance

Quantify campaign effectiveness

Conduct NPS tracking

LINKING 20,000 DATA POINTS TO CUSTOM RESEARCH

What we know: Global Trends

REGIONAL INSIGHTS

Some general nuances…

NORTH AMERICA

Mobile-driven, still receptive to PCs/Laptops and traditional media

Over half pay for digital content

Privacy and data savvy

EUROPE

Less social-driven

Less digital content purchase

Online purchases PC/Laptop-driven

APAC

Mobile-driven internet and purchase journey

Adopted paid digital content

Tech savvy

LATIN AMERICA

Mobile-first

Above global average time-spent on social

Similar % to NA for paid digital content

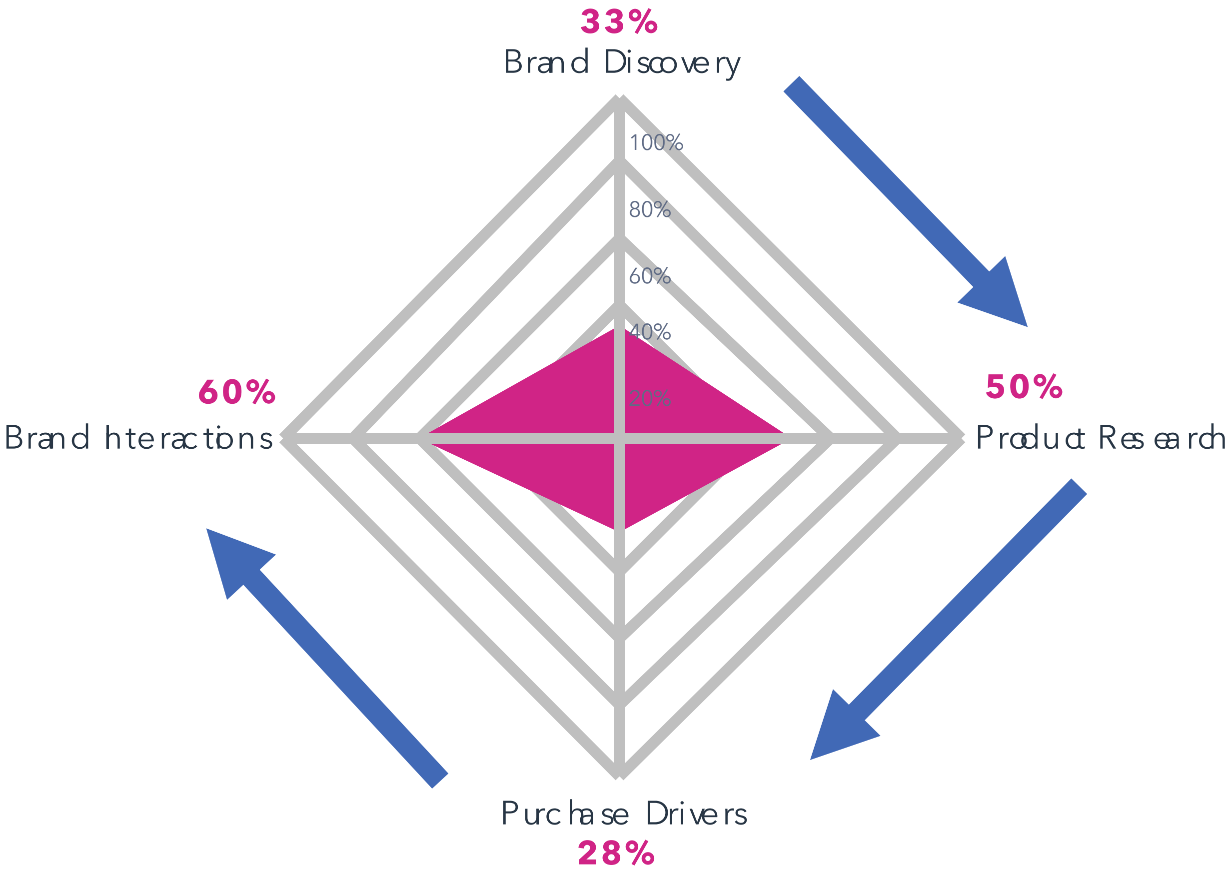
MEA

Mobile-first

Internet usage is social-driven

Content builds from social

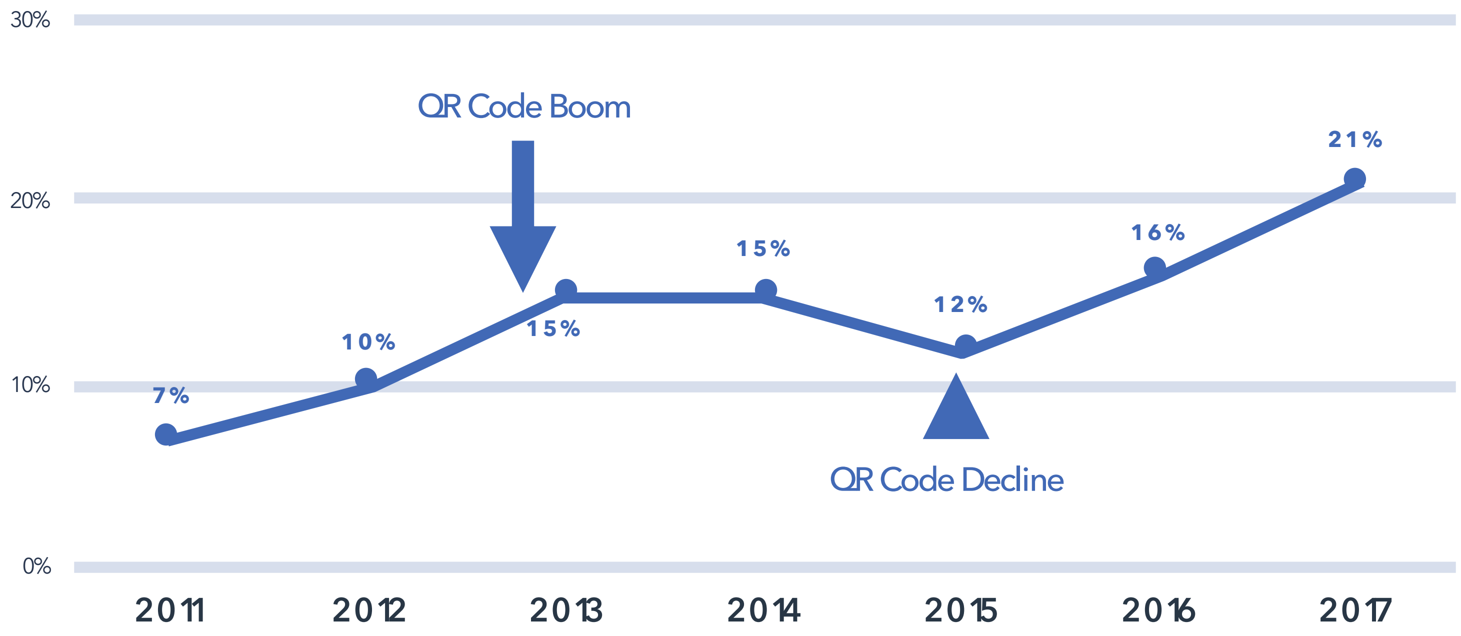
Product Search is a Social Affair



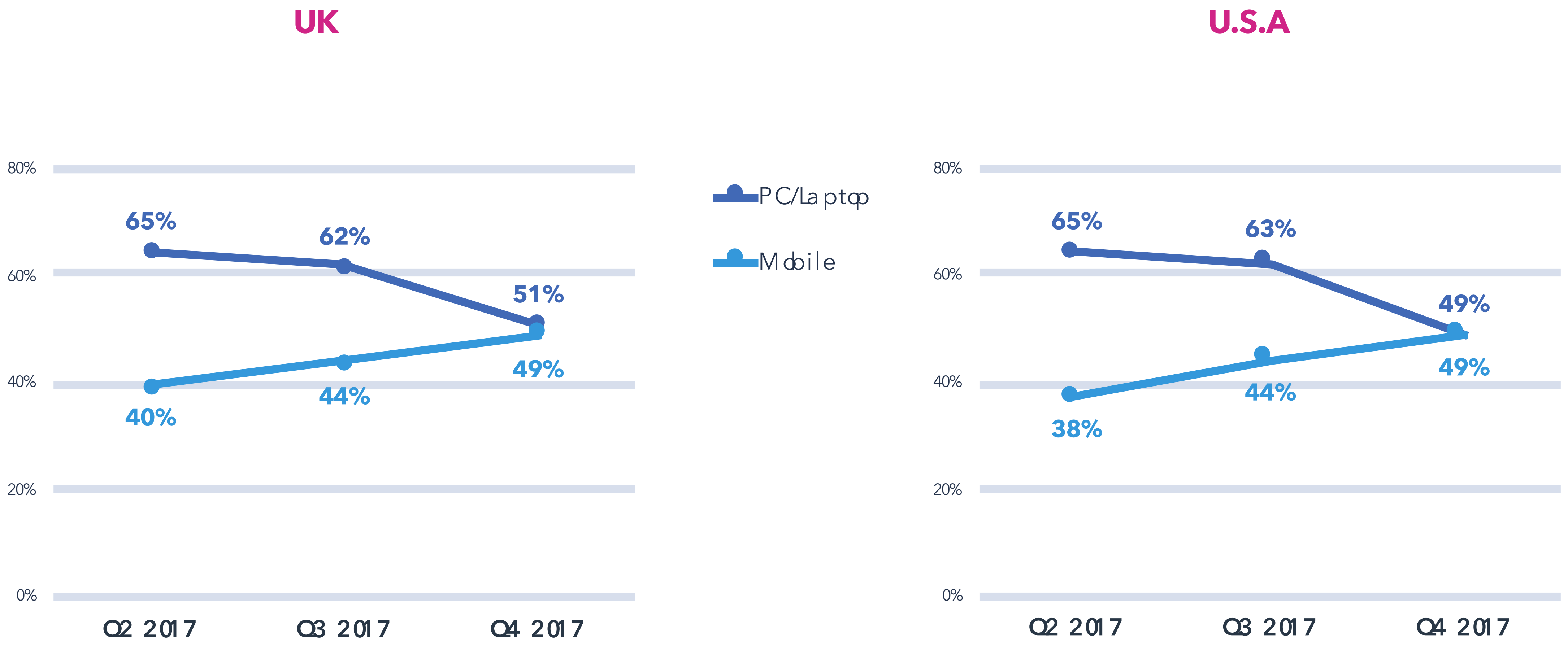
Just 12% say "buy" buttons would motivate them to purchase.

QR Code: The New Interactive

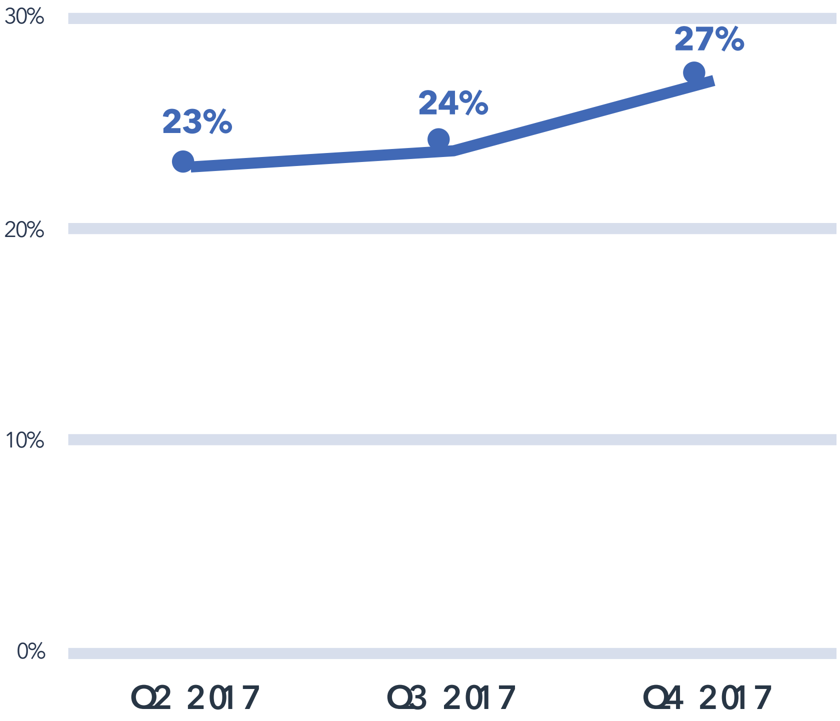
Experience Marketing is becoming more prominent than ever.



Mobile Taking over Commerce



Voice Search



Smart Speakers e.g. Amazon Echo

16%
Currently Use

35%
Planning to Purchase

GEN Z

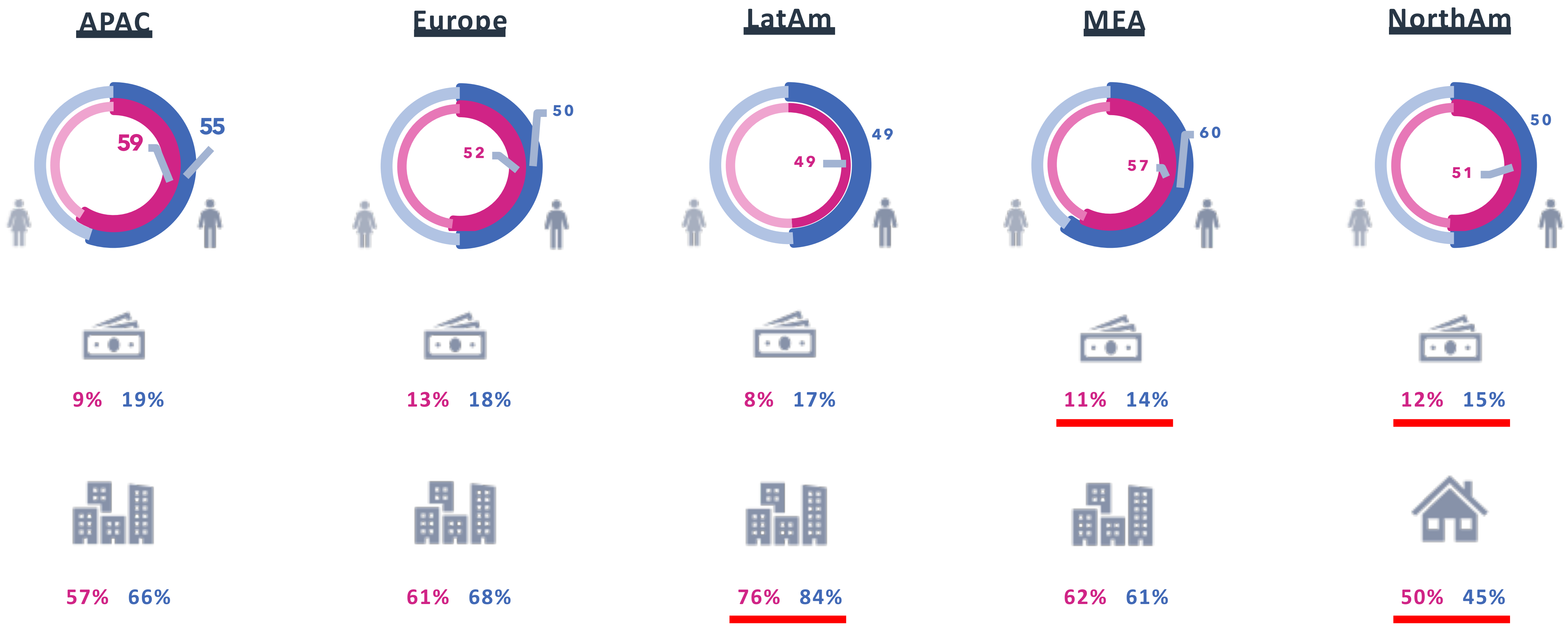
16-20

GEN Y

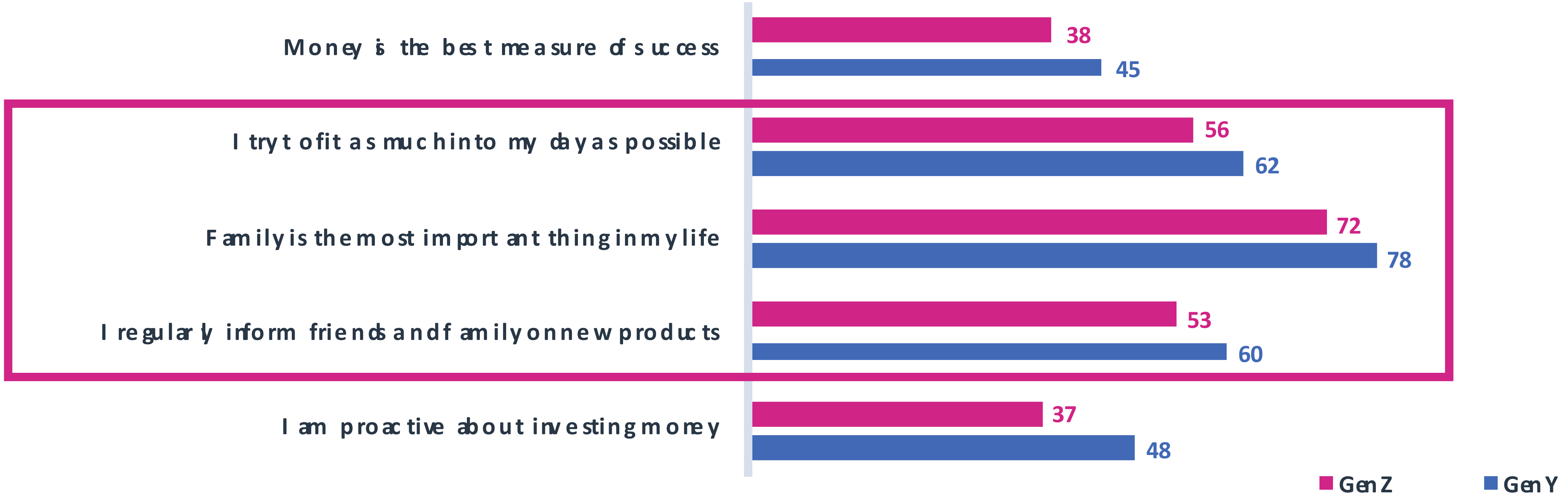
a.k.a Millennials

21-34

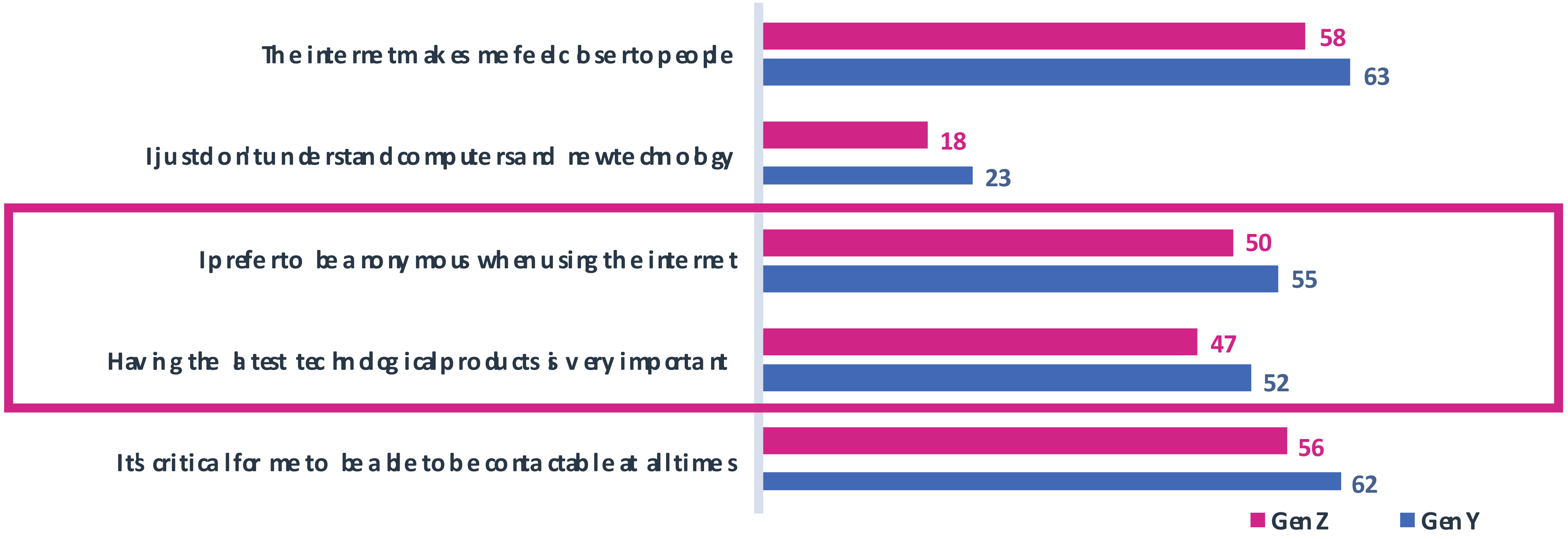
Across the Globe



Their Self Perceptions:
Where Attitudes Differ the Most



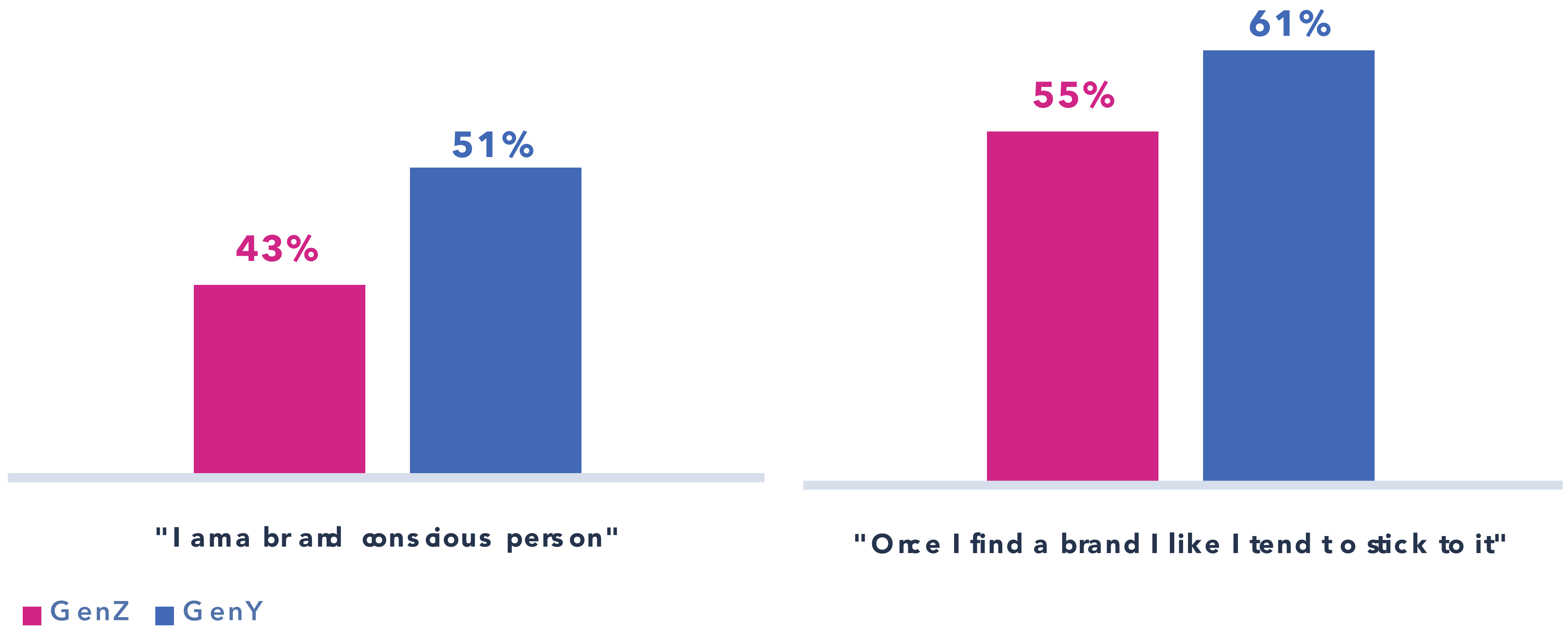
Tech Perceptions:
Where Attitudes Differ the Most



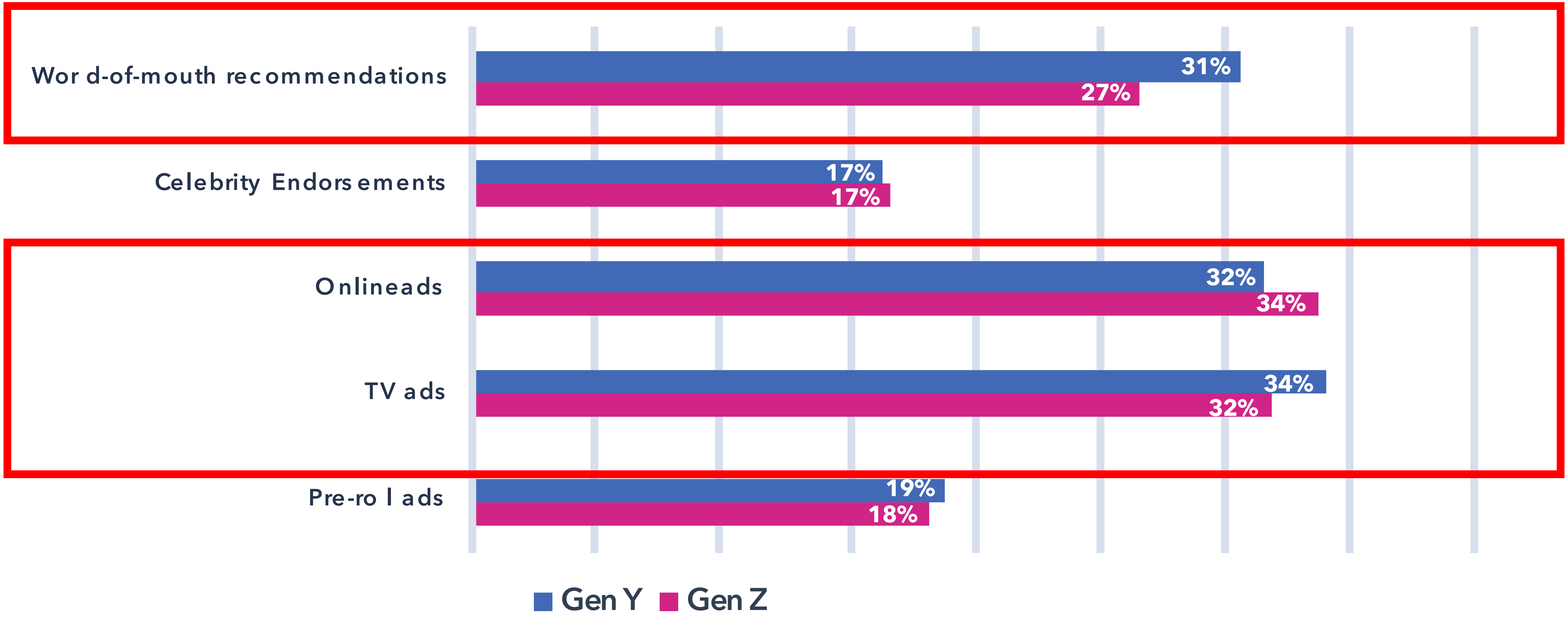
Brand Engagement

Brand Interactions

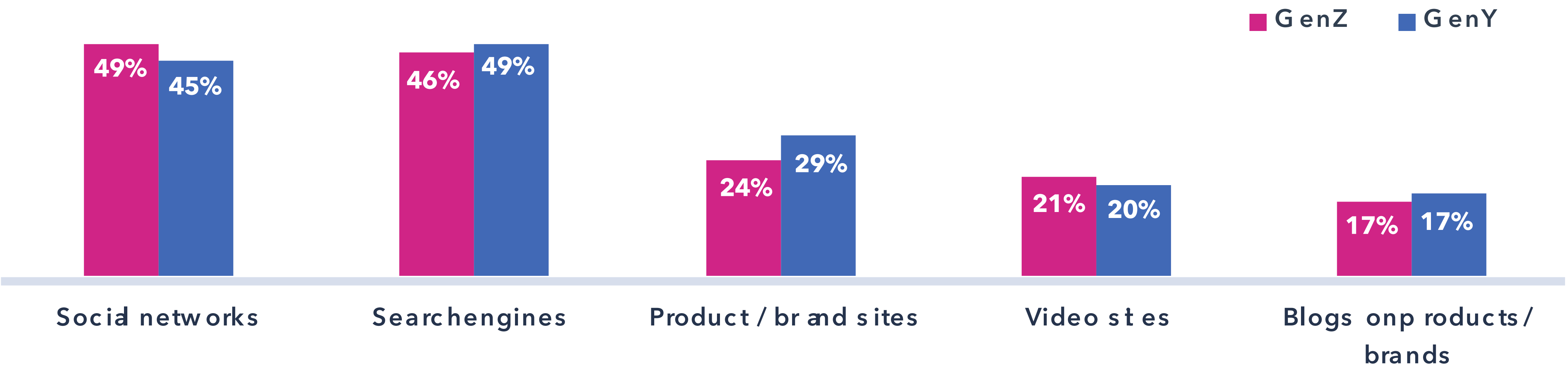
Brand associations tend to increase and stick with older age



Brand Discovery: Old and New Ways



Brand Research moves to Social

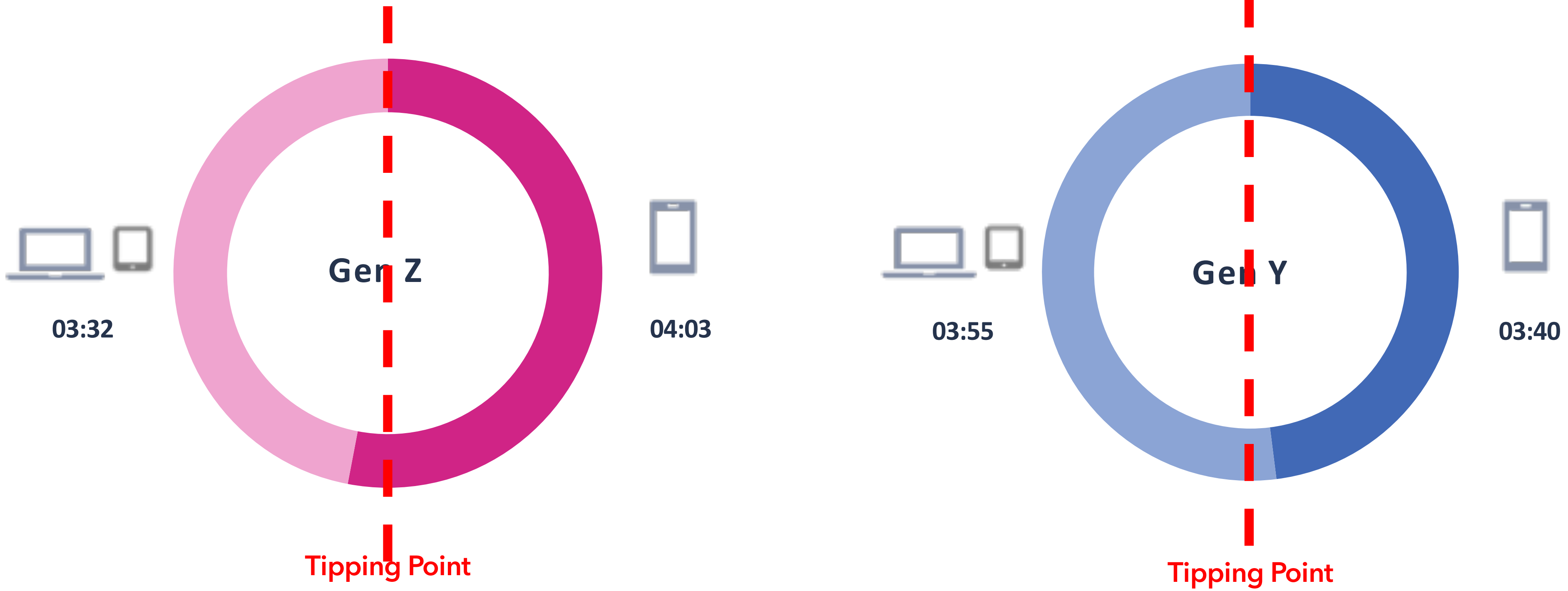


Gen Zers in APAC, LatAm and MEA are most likely to be turning to social over search.

Gen Yers are choosing social in LatAm and MEA.

Device and Social Media Usage

Mobile leads time spent online per day

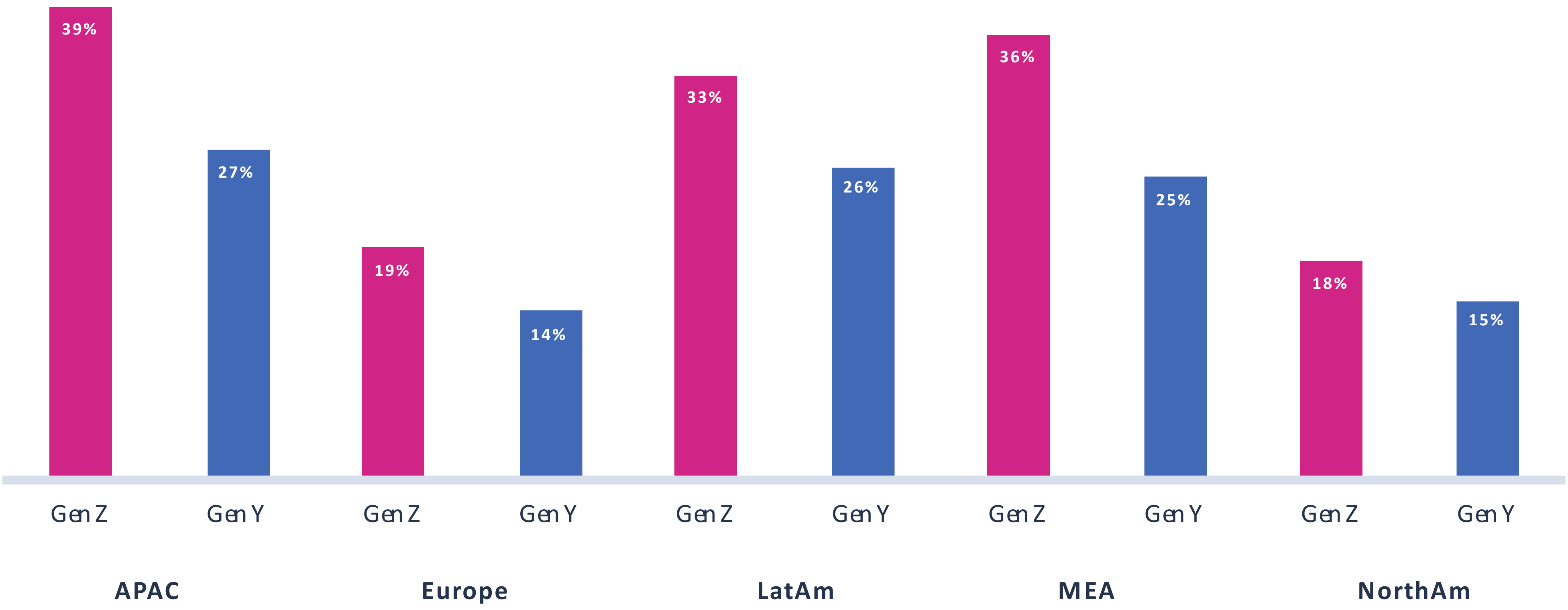


Gen Z has passed the tipping point in APAC, Latin America and the Middle East & Africa.

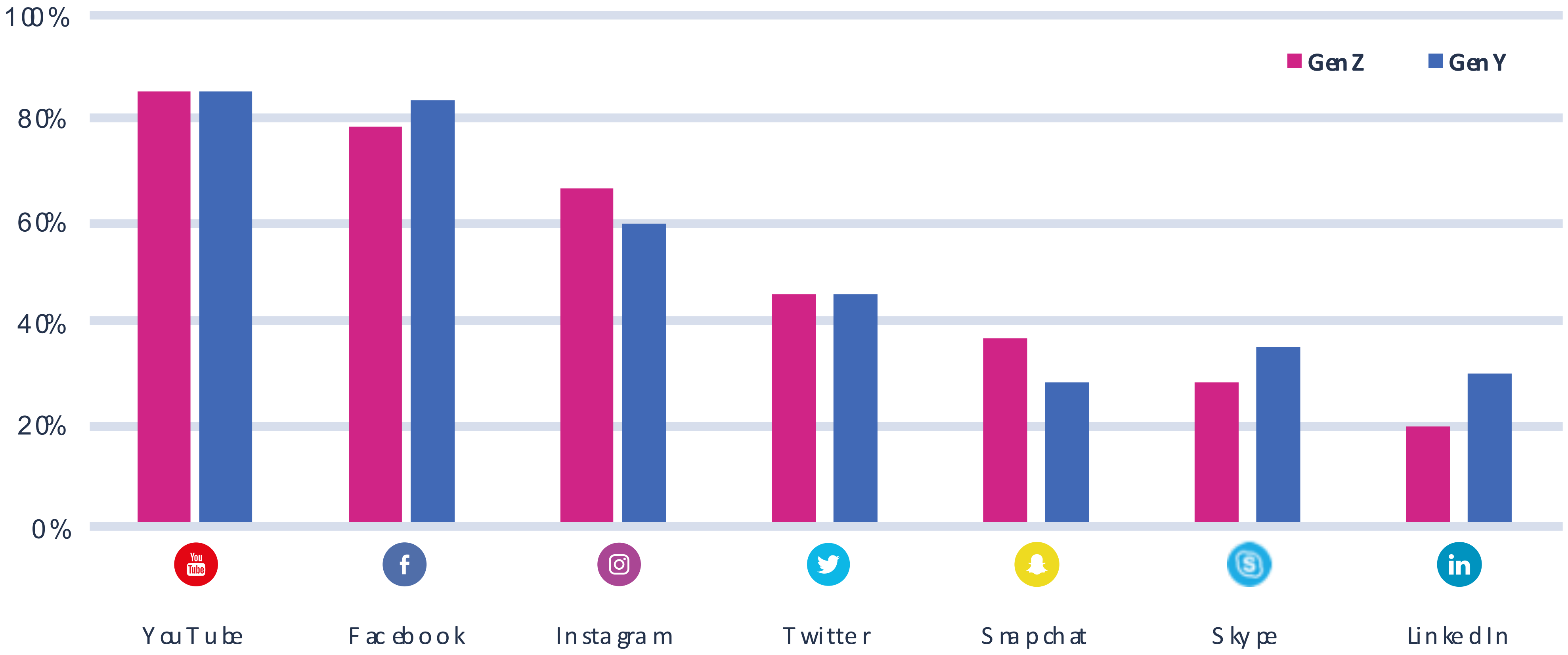
Gen Y has passed the tipping point only in APAC.

Devices are Shared among Younger Audiences

More mature regions tend to have personal devices

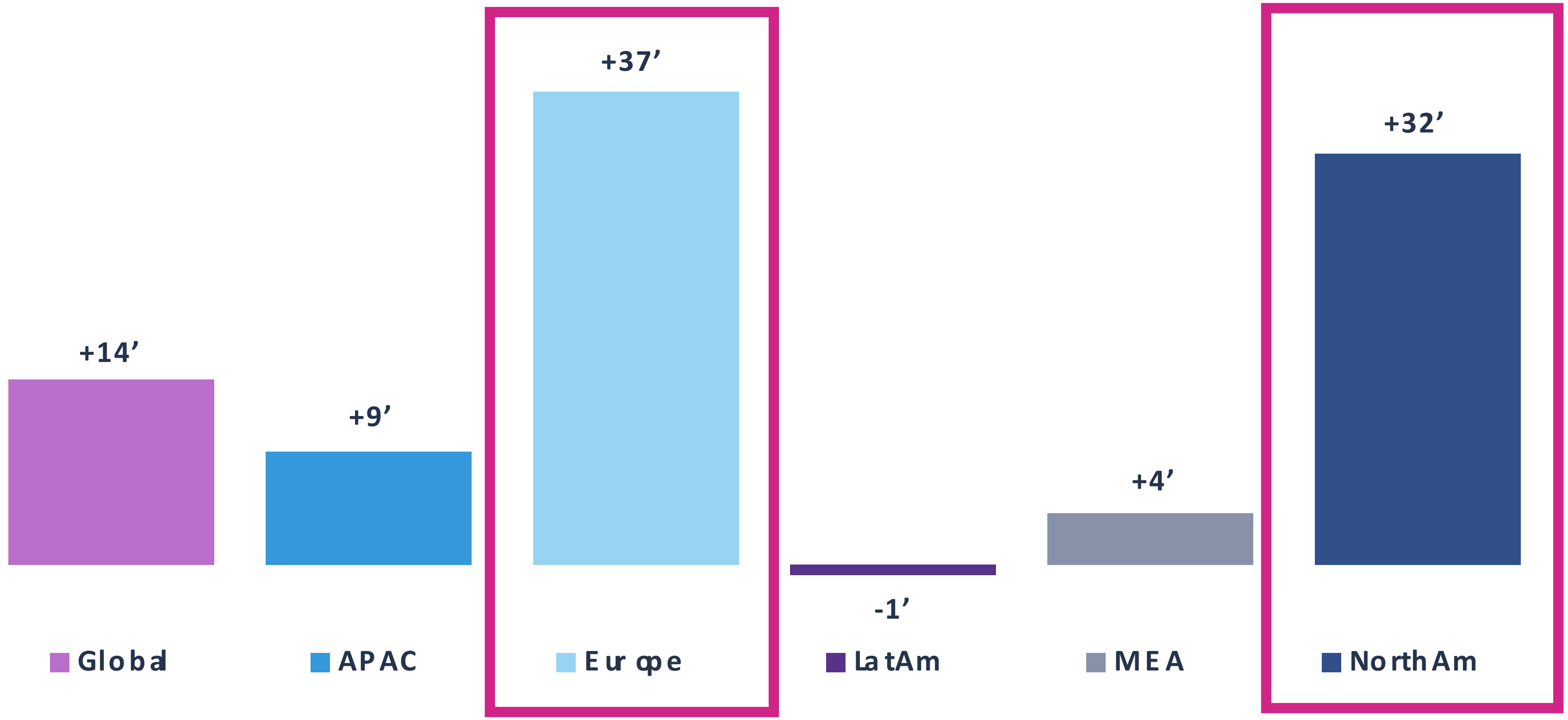


Purpose > Habit on Social Media



North Am and Europe Gen Y behind on habit

Figures represent the **difference in minutes** for social time spent between **Gen Z** and **Gen Y**.



Differences in mature regions show how Gen Z become pickier and more particular with longer time spent on social media

Social Media Segments and Motivations

	Gen Z	Gen Y
Brand Followers	58	62
Celebrity Networkers	72	65
Content Networkers	58	55
News Networkers	51	57
Professional Networkers	39	51

■ Gen Z ■ Gen Y

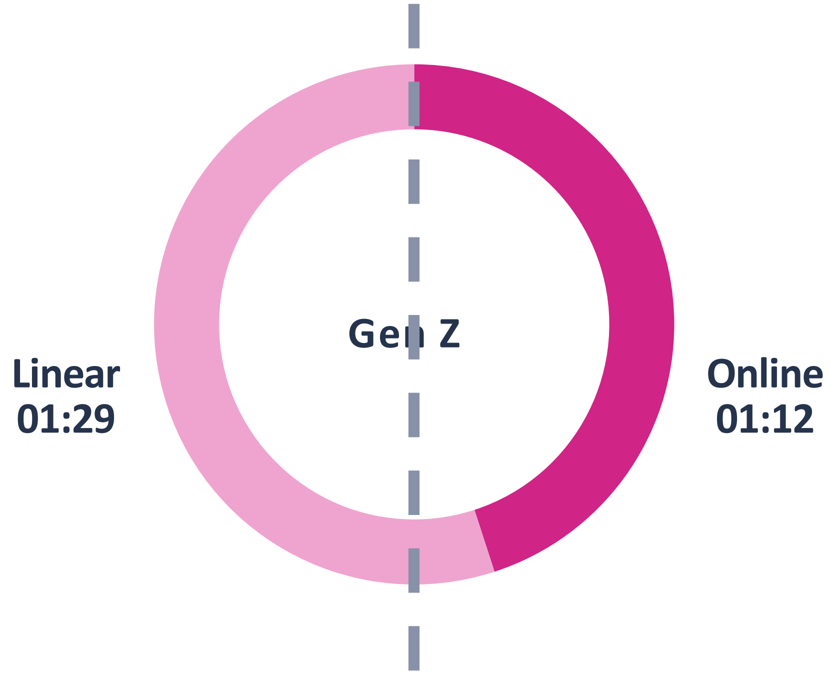
- "Experience Marketing"
- Following influencers over brands
- Entertainment

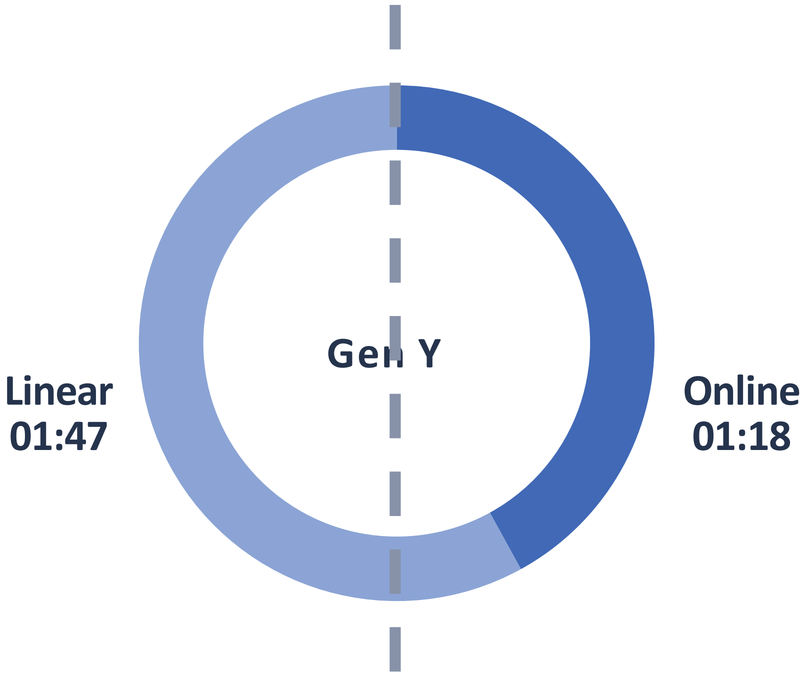
- A direct B2C approach
- To follow brands on social, and more likely to interact
- Using social for work and news

Media Consumption

TV: Daily Time Spent

15% of Gen Zers / 20% Gen Yers paid for a movie or TV streaming service last month

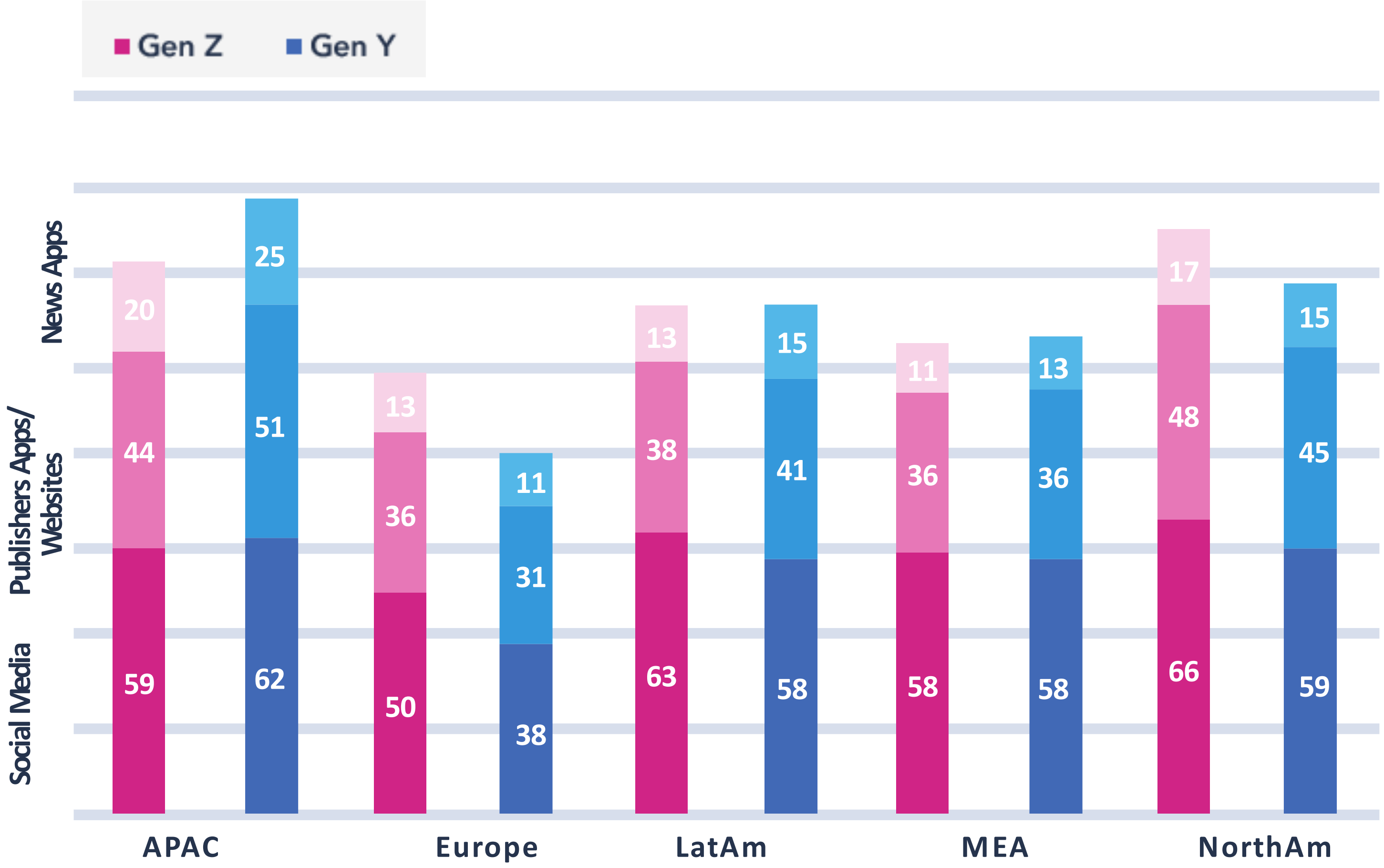




North American Gen Z are the most engaged with linear and online TV.

Ahead of Gen Z for online time in APAC and Latin America.

News Consumption



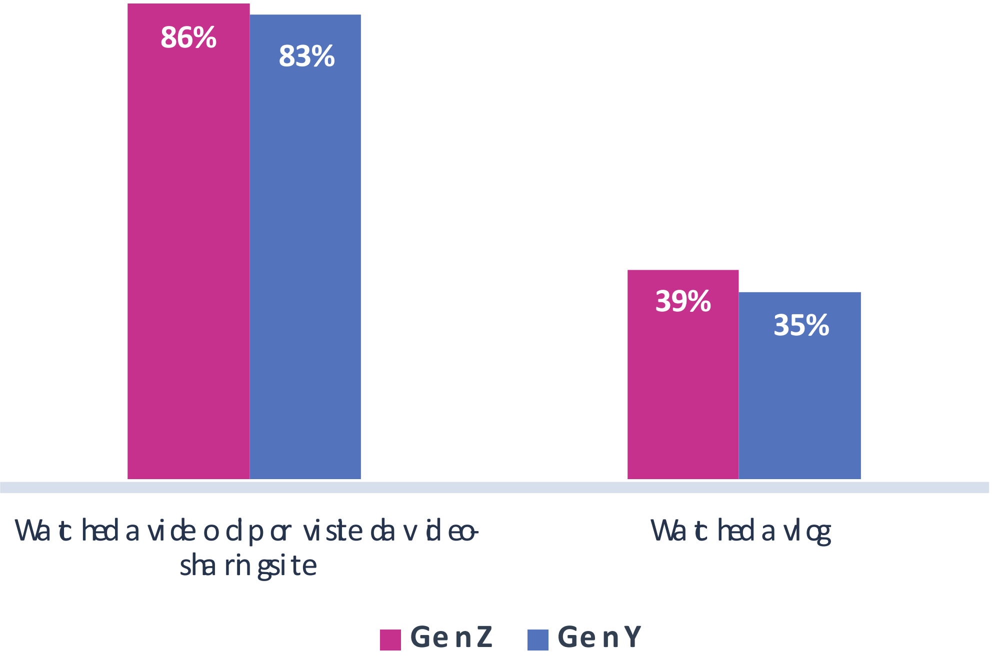
Gen Y's daily routines moving online - beyond social

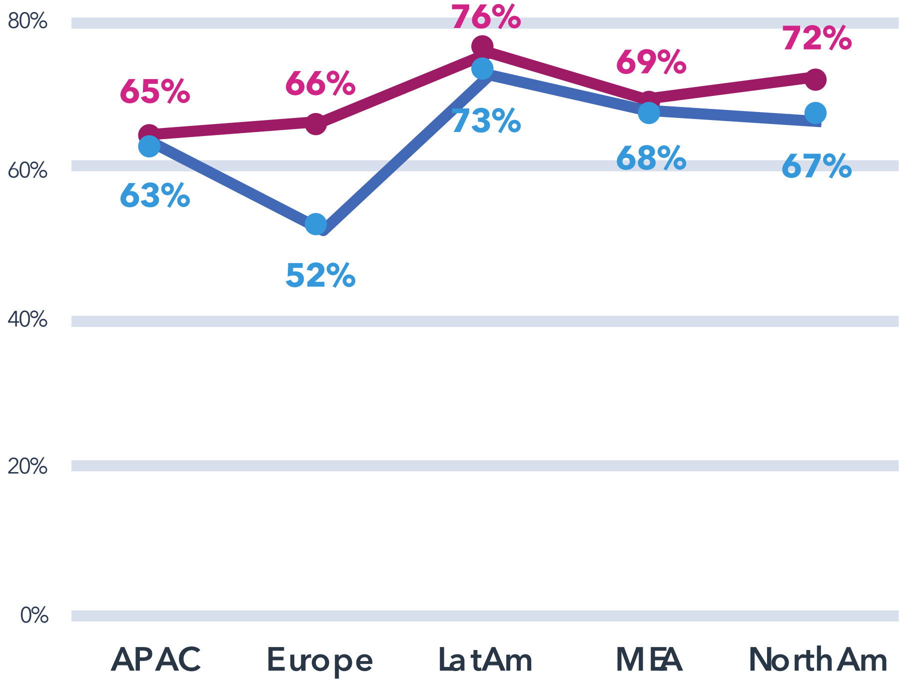
APAC Gen Z most open to news online

Daily Time Spent :
Physical Press (hh:mm)
00:43 00:46

Online Press (hh:mm)
00:57 01:05

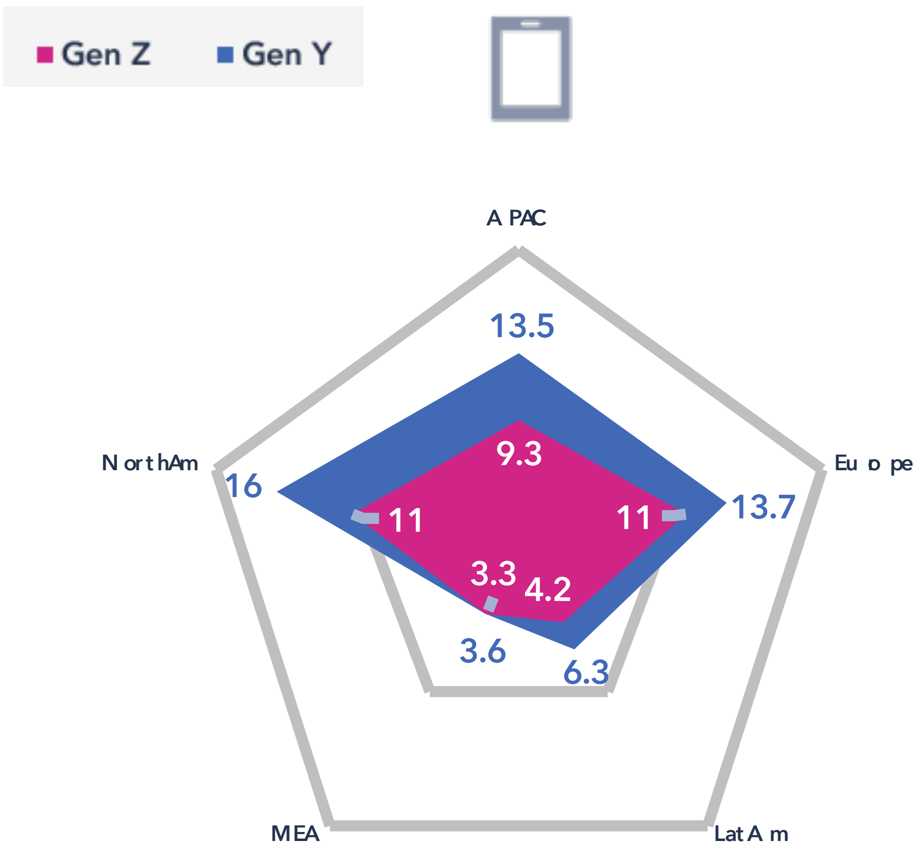
Entertainment Content

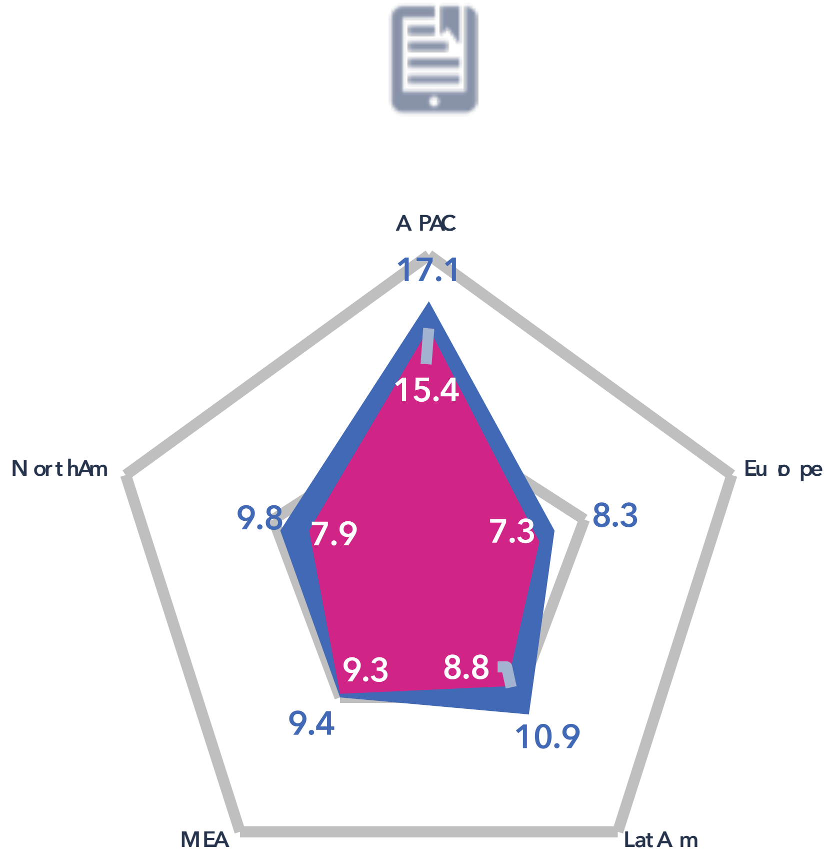




Video is commonplace, Europe Gen Y least interested, Lat Am closes the gap between generations

E-Readers & E-Books: Format wins





APAC fully adopted E-Books, while GEN Y in general embraced E-Readers.

Profiling E-Book Readers (UK & US):

65% Uni degree
or above

25% Download & Read
On tablet

29% alternate
between books

Mystery/Crime -
Fantasy - Romance
Horror - Sci-fi

7.6% gave up
on print

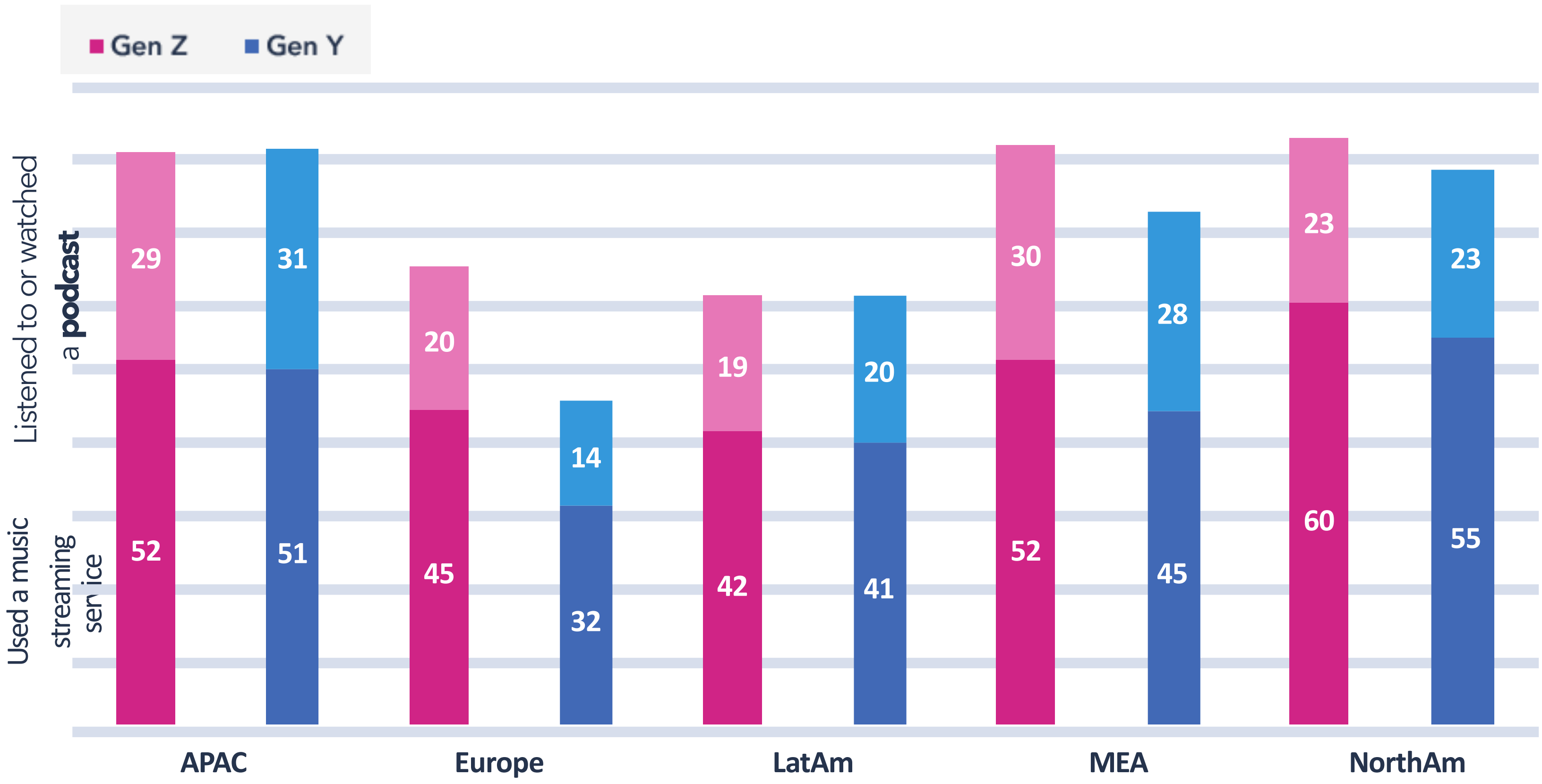
Print:
Share, Keep, Collect
& Donate

20% read
shared E-Books

1 in 5 read
2-3 E-Books
per month

42% Ads not welcome,
even if content is free

Audio: Music & Podcasts



1 in 5 Gen Zers / Gen Yers paid for a music streaming service last month, likely to stream on mobile.

APAC and MEA Gen Y show growing interest in podcasts, also big audience on social in general.

Profiling Podcast Listeners (UK & US):

70% Uni degree
or above

1 in 3 use niche
aggregators
PocketCast Ucast Overcast

Top Genres

29% Binge-Listen!
39% listen daily

More Educational –
Less comments valued

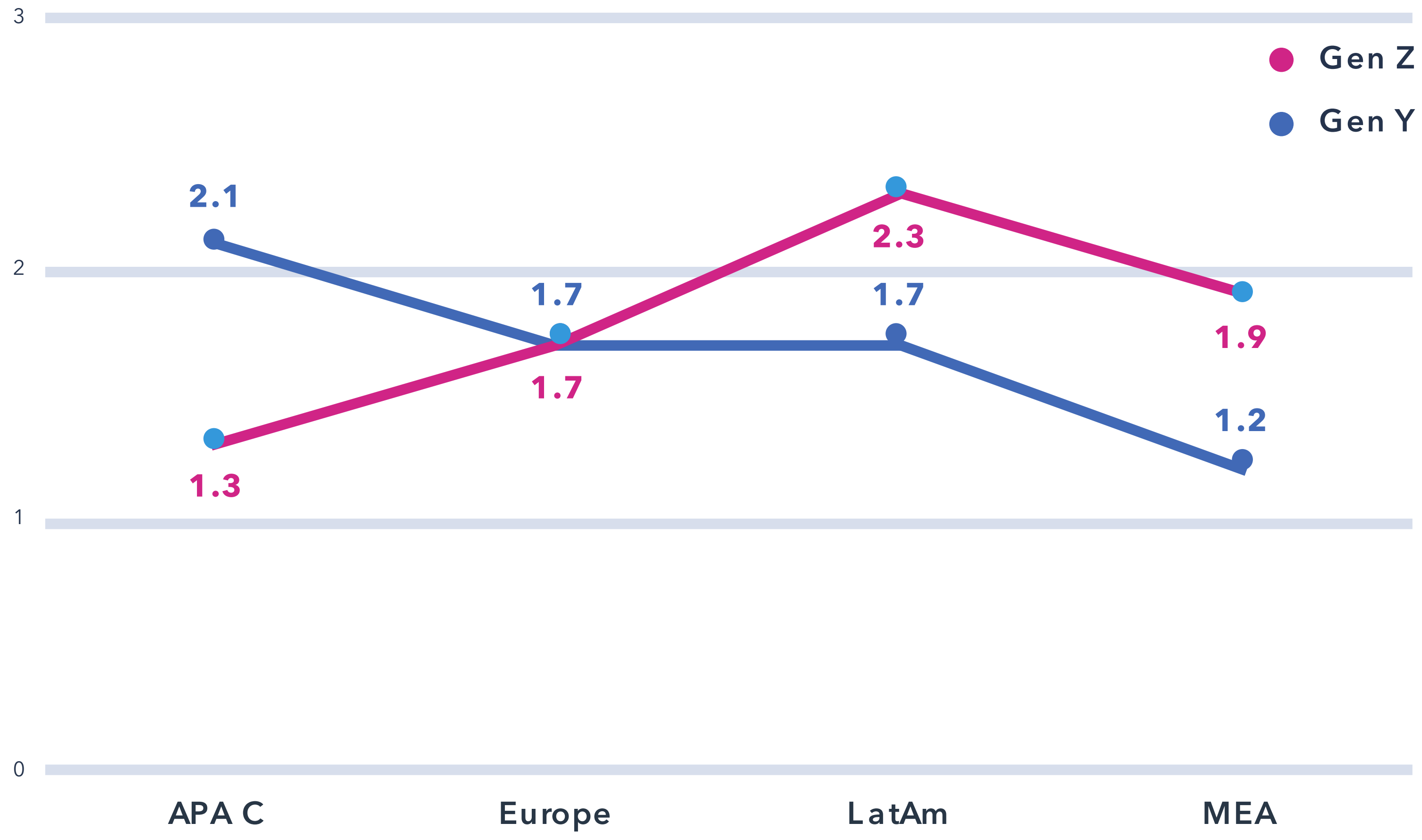
Around half download/
Stream Subs on Apps

34% Subs to
1+ podcasts

Mobile key –
24% listen on PCs

32%:
Relevant ads OK

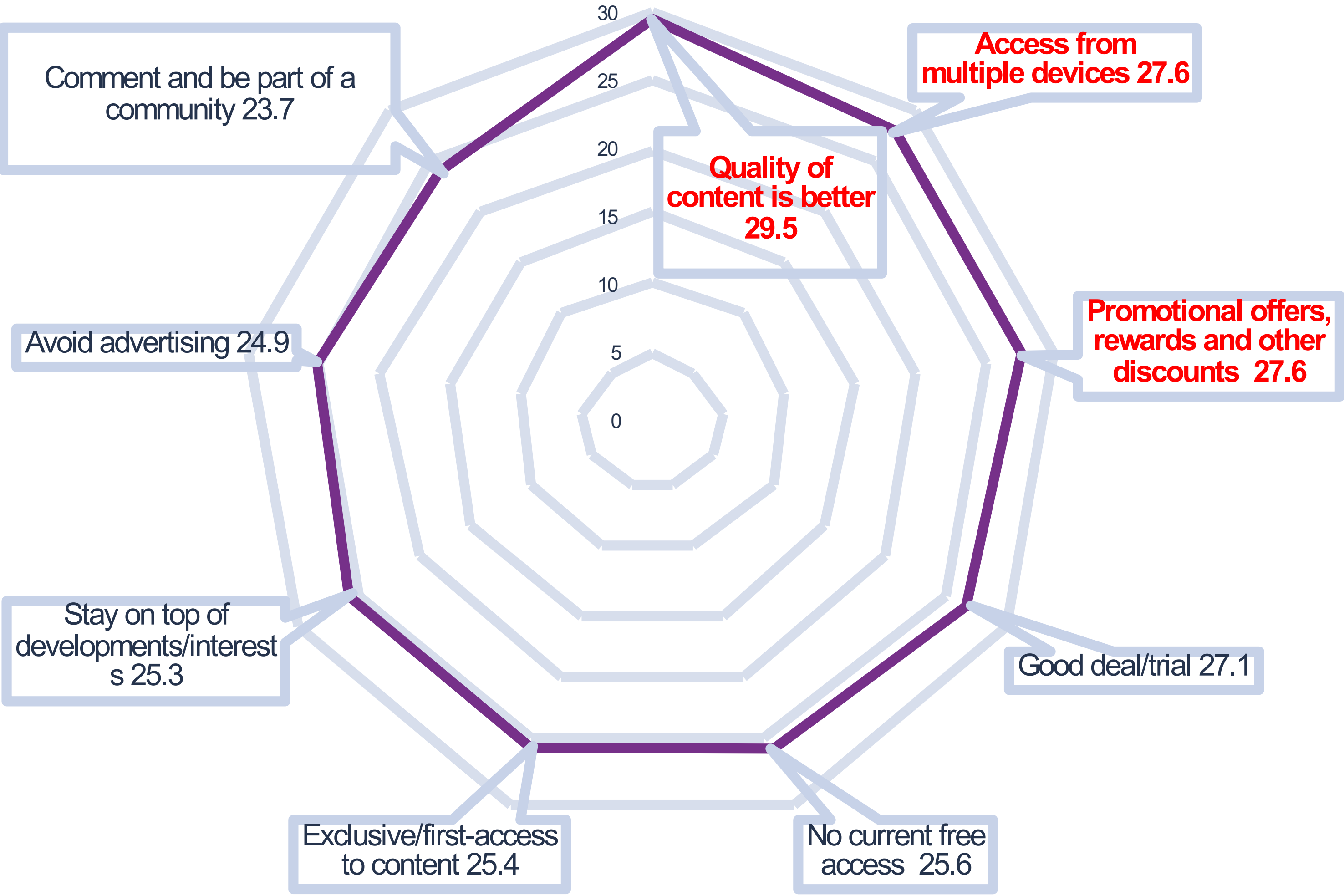
Paying for digital content



Fast growth regions open to paying for content.

Saturation in mature regions reflected in Gen Y behaviour

Profiling Paying Digital Content Consumers



Reasons to pay – at all:

Paying connotes *quality* for consumers.

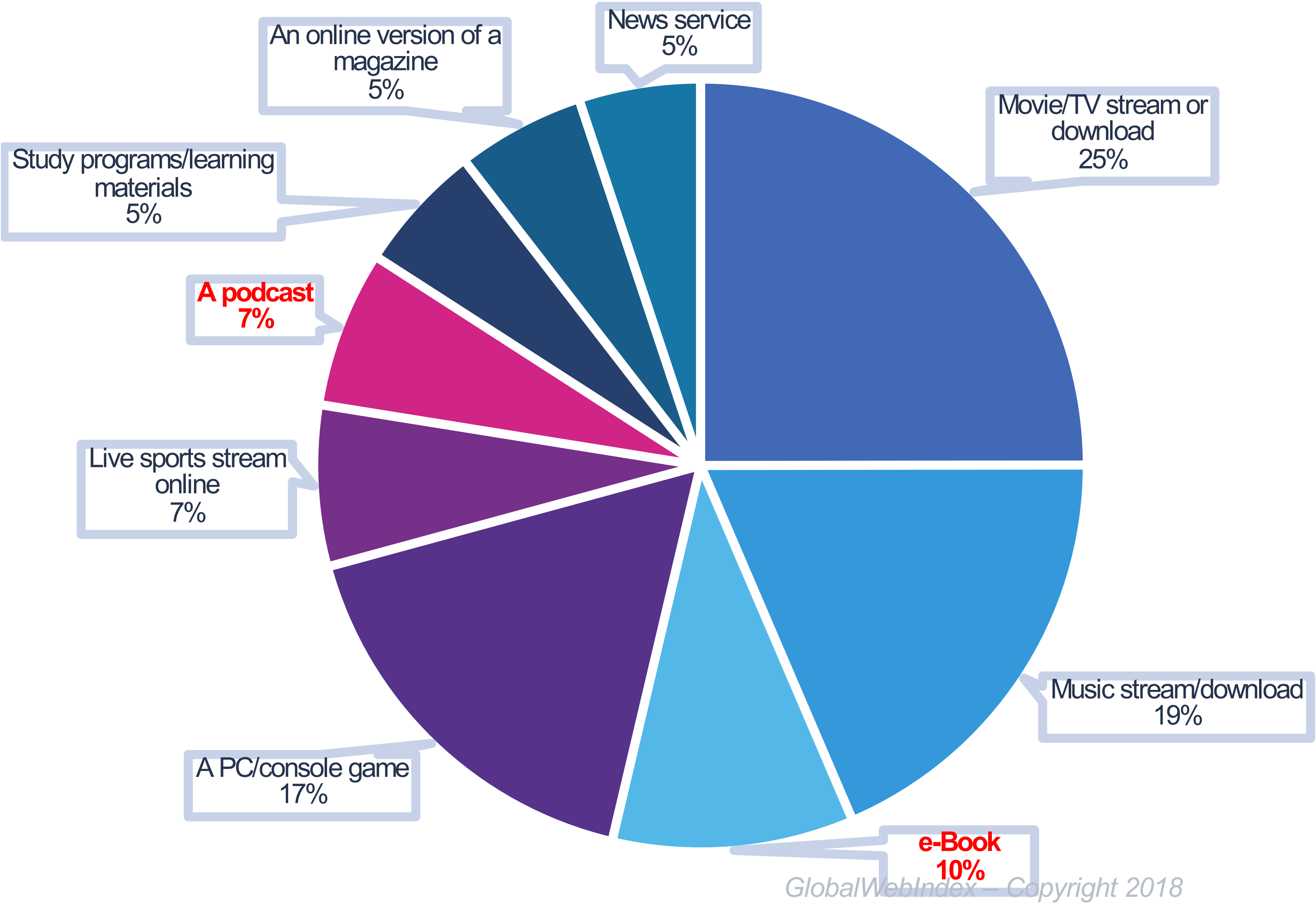
With it, utility, offers, rewards, trials are expected to follow should follow… (UK& US)

Paying News Consumers (UK & US):

Reasons to pay for news:

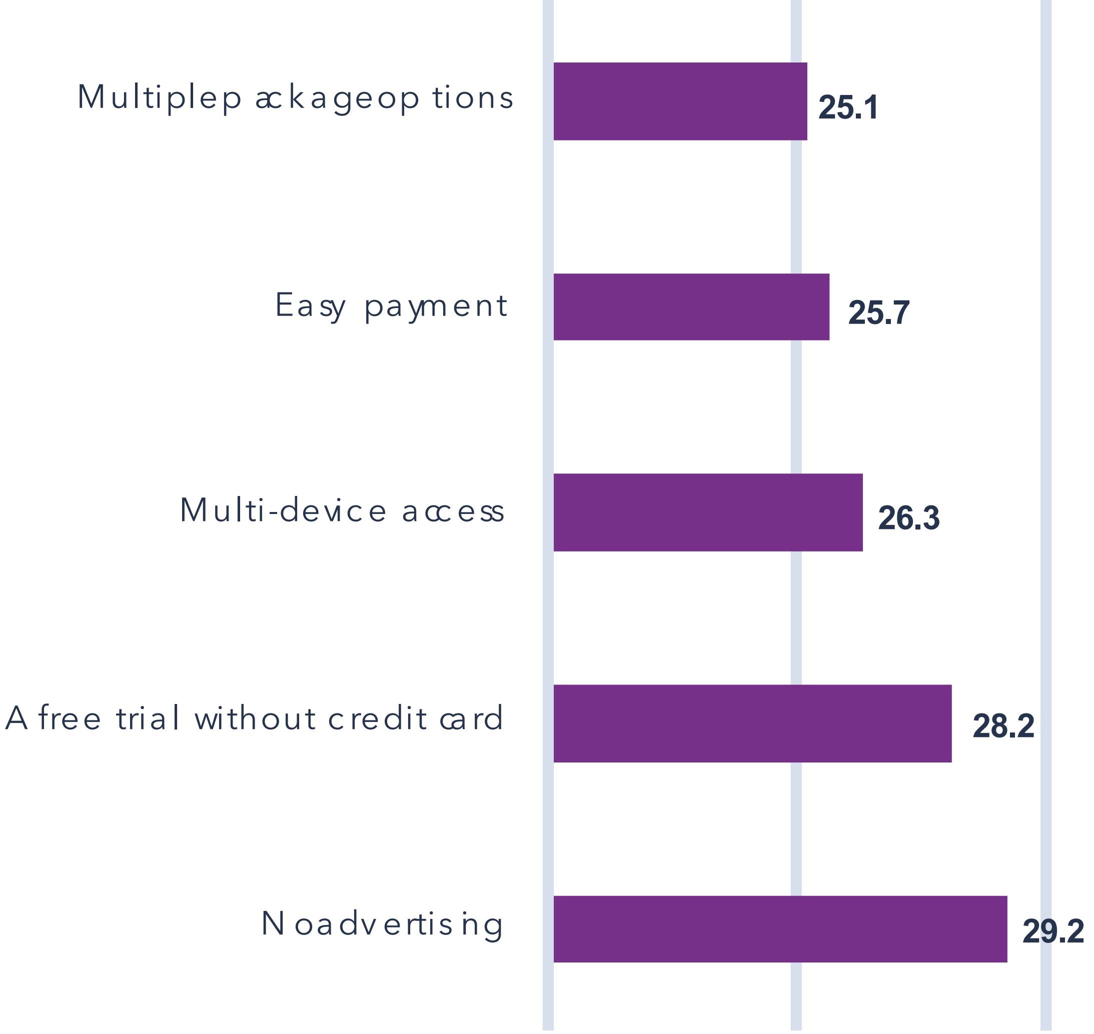
Funding personal values/views, getting more of what matters to them key for consumers to pay for content.

Purchase Consideration for Digital Content



E-Books and Podcasts slowly becoming a part of the norm; among music, films and games for paid-content.
(UK & US)

Must-haves of paid-for digital content (UK & US)



Expectations from paid digital content:

- ✓ Payment = Ad-free content
- ✓ All-access
- ✓ Benefits
- ✓ Deep/exclusive coverage

Things to Remember…

- ✓ Mobile tipping point
- ✓ Internet and social media = purpose-driven
- ✓ Consumers more savvy and picky
- ✓ Older age groups catching up
- ✓ Gen Z and fast growth regions adopt fast
- ✓ Social media entry to innovation, content
- ✓ Older gens adopt more discerningly
- ✓ Paid-content → balance utility and

Slides 9-13

Source: GlobalWebIndex Q1-Q4 2017 (average taken across all the waves of research conducted), Global, Total Sample: 370,051

Slides 14 – 32 & 34

Source: GlobalWebIndex Q1, Q2, Q3 & Q4 2017		
	Gen Z	**Millennials**
APAC	15287	58383
Europe	9819	36863
Latin America	3016	9340
Middle East & Africa	4775	17343
North America	4834	22873

Slides 33 – 40

Source: GlobalWebIndex Custom Study, 2018, UK & US only

Ebook Readers	3,085
Podcast Listeners	2,912
Paid digital content buyers	3,723

Questions?

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Thanks!

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