Global Digital Audience Insights

Consumption and Trends

Nisa Bayindir – Director of Global Insights, GlobalWebIndex
A bit about us...
430K + SURVEYS A YEAR IN 44 MARKETS

**AMERICAS**
- Argentina
- Brazil
- Canada
- Mexico
- USA

**EMEA**
- Belgium
- Egypt
- France
- Ghana
- Germany
- 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

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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

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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

**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

**APAC**
- Mobile-driven internet and purchase journey
- Adopted paid digital content
- Tech savvy

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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

UK

<table>
<thead>
<tr>
<th>Quarter</th>
<th>PC/Laptop</th>
<th>Mobile</th>
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<tbody>
<tr>
<td>Q2 2017</td>
<td>65%</td>
<td>40%</td>
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<tr>
<td>Q3 2017</td>
<td>62%</td>
<td>44%</td>
</tr>
<tr>
<td>Q4 2017</td>
<td>51%</td>
<td>49%</td>
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U.S.A

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<tr>
<th>Quarter</th>
<th>PC/Laptop</th>
<th>Mobile</th>
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<tbody>
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<td>38%</td>
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<tr>
<td>Q3 2017</td>
<td>63%</td>
<td>44%</td>
</tr>
<tr>
<td>Q4 2017</td>
<td>49%</td>
<td>49%</td>
</tr>
</tbody>
</table>

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Voice Search

Smart Speakers e.g. Amazon Echo

- 16% Currently Use
- 35% Planning to Purchase

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GEN Z (a.k.a Millennials)

16-20

GEN Y

21-34
Their Self Perceptions: Where Attitudes Differ the Most

- **Money is the best measure of success**
  - Gen Z: 38
  - Gen Y: 45

- **I try to fit as much into my day as possible**
  - Gen Z: 56
  - Gen Y: 62

- **Family is the most important thing in my life**
  - Gen Z: 72
  - Gen Y: 78

- **I regularly inform friends and family on new products**
  - Gen Z: 53
  - Gen Y: 60

- **I am proactive about investing money**
  - Gen Z: 37
  - Gen Y: 48

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Tech Perceptions:
Where Attitudes Differ the Most

- I prefer to be anonymous when using the internet
- Having the latest technological products is very important
- The internet makes me feel closer to people
- It's critical for me to be able to be contacted at all times

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Brand Interactions

Brand associations tend to increase and stick with older age

"I am a brand conscious person"

43% GenZ 51% GenY

"Once I find a brand I like I tend to stick to it"

55% GenZ 61% GenY
Brand Discovery: Old and New Ways

- World-of-mouth recommendations: Gen Y 31%, Gen Z 27%
- Celebrity Endorsements: Gen Y 17%, Gen Z 17%
- Online ads: Gen Y 32%, Gen Z 34%
- TV ads: Gen Y 34%, Gen Z 32%
- Pre-rol ads: Gen Y 19%, Gen Z 18%
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

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Purpose > Habit on Social Media

- YouTube
- Facebook
- Instagram
- Twitter
- Snapchat
- Skype
- LinkedIn

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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

<table>
<thead>
<tr>
<th>Segment</th>
<th>Gen Z</th>
<th>Gen Y</th>
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<tbody>
<tr>
<td>Brand Followers</td>
<td>58</td>
<td>62</td>
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<tr>
<td>Celebrity Networkers</td>
<td>72</td>
<td>65</td>
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<tr>
<td>Content Networkers</td>
<td>58</td>
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<tr>
<td>News Networkers</td>
<td>51</td>
<td>57</td>
</tr>
<tr>
<td>Professional Networkers</td>
<td>39</td>
<td>51</td>
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</tbody>
</table>

- “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

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Media Consumption
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.

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

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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
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

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Fast growth regions open to paying for content.

Saturation in mature regions reflected in Gen Y behaviour.
Profilng Paying Digital Content Consumers

Reasons to pay – at all:

Paying connotes quality for consumers.

With it, utility, offers, rewards, trials are expected to 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)

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

Expectations from paid digital content:

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

- Multiple package options: 25.1%
- Easy payment: 25.7%
- Multi-device access: 26.3%
- A free trial without credit card: 28.2%
- No advertising: 29.2%
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 quality
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

<table>
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<tr>
<th>Region</th>
<th>Gen Z</th>
<th>Millennials</th>
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<tr>
<td>APAC</td>
<td>15287</td>
<td>58383</td>
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<tr>
<td>Europe</td>
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<tr>
<td>Latin America</td>
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<td>North America</td>
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<td>22873</td>
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Questions?

Nisa@globalwebindex.com

Slides 33 – 40

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

<table>
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<tr>
<th>Category</th>
<th>Count</th>
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<tbody>
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<tr>
<td>Podcast Listeners</td>
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<tr>
<td>Paid digital content buyers</td>
<td>3,723</td>
</tr>
</tbody>
</table>
Thanks!

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