globalwebindex

GWI Brand Summary

▪ Q1 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 Q4 2013 wave of research, we offer insights on:

- How consumers are discovering and researching products – both online and offline

- The platforms on which internet users are interacting with brands

- The role of social networks in the brand-consumer relationship

- 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.

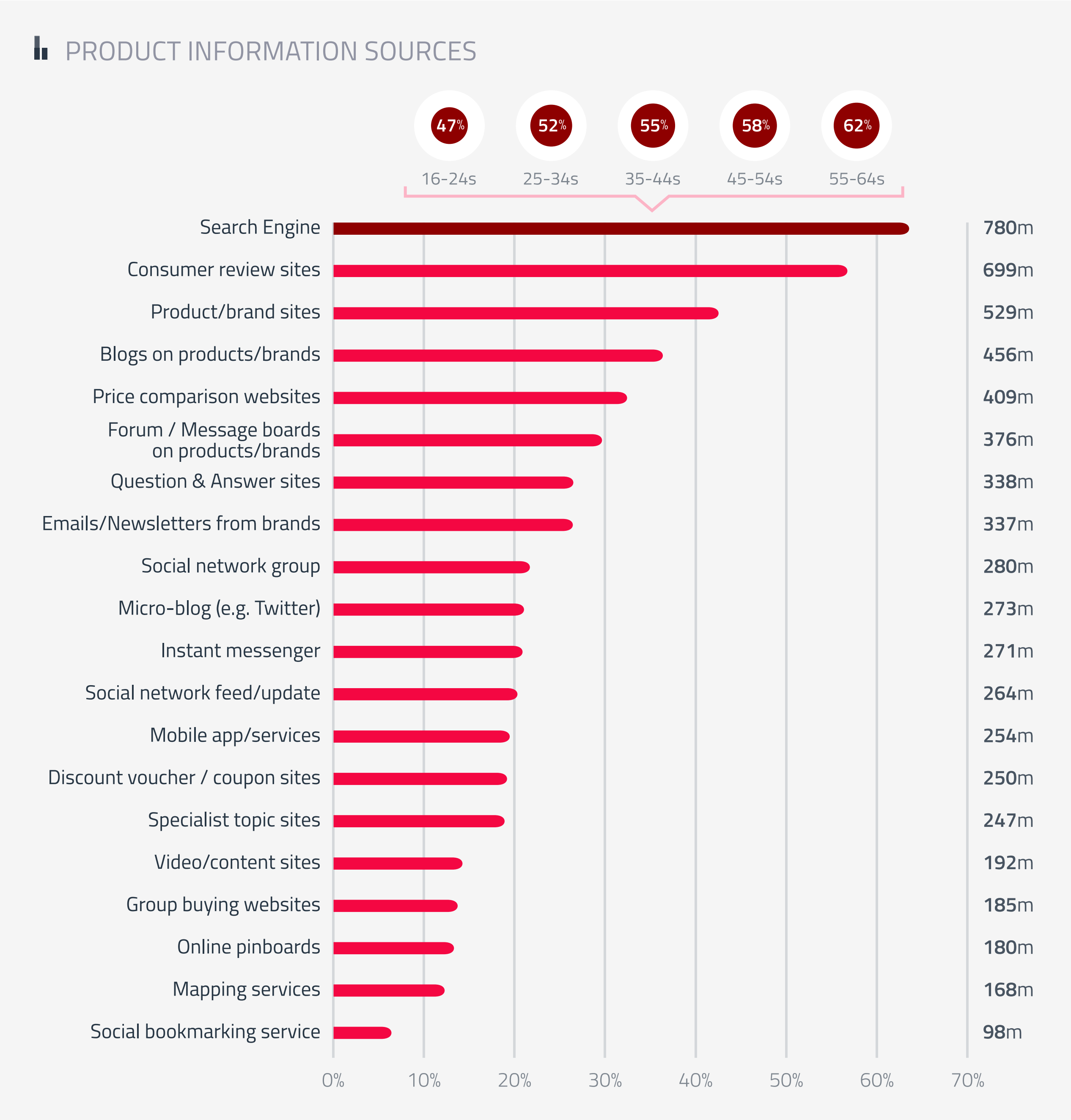
In this summary, we provide some of the main headlines and statistics from the report. For more detailed insights, coverage and implications, please see the full version. Further details on any of the topics covered in this report are also available through our pre-cut Data Packs in the Insight Store.

Search Engines: Still a Dominant Force in the Product Discovery Process

- **Search engines are the most popular way of finding out more information about a product or brand (53%)** and are especially influential in markets like Germany (70%) and Sweden (65%).

- However, usage increases in line with age: search tools are used by 47% of 16-24s versus 62% of 55-64s – a pattern which holds true across most regions and markets.

- The opposite trend is true for tools such as Question & Answer sites (e.g. Quora), where 16-24s lead at a global level. Of course, the overall numbers using Q&A platforms are smaller, but this nevertheless reflects the **enthusiasm with which younger age groups are embracing new types of product discovery channels.** It's certainly telling that the same age distribution is repeated for online pinboards, mobile apps and video/content sites.



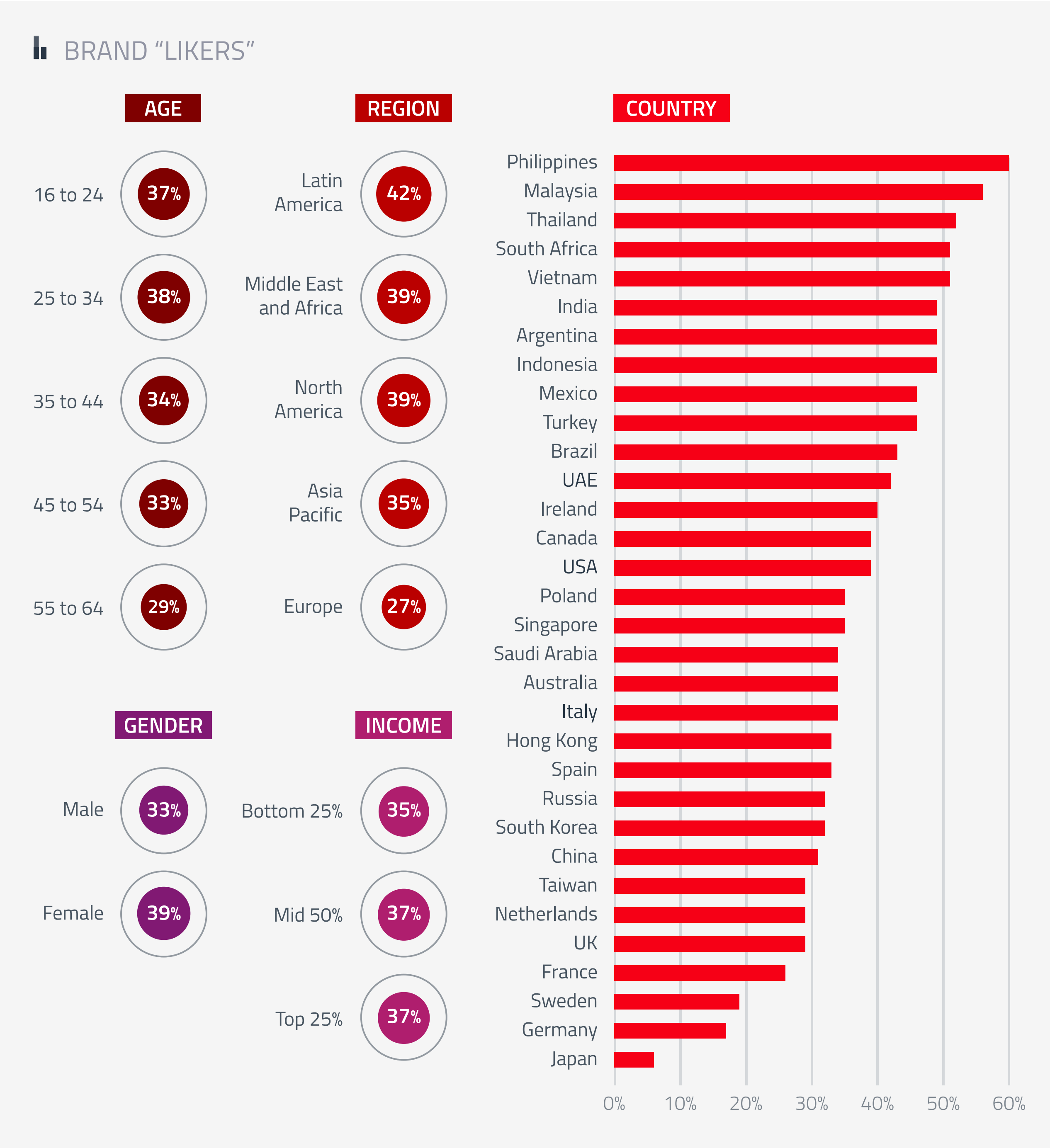
Question: Which of the following online sources are you primarily using when you are ACTIVELY looking to find out more information about brands, products, or services? **Source:** GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

Brand "Likers": Over a Third of Internet Users

- **The most common online interactions with brands are visiting websites (54%) and clicking the "like" or "+1" buttons on social networks (35%).**

- Liking a brand is relatively equal by income, but women are slightly ahead of men and 16-34s have a small lead over the other age groups. Brand advocates (those who say they regularly tell friends/family about new products and services) also over-index here.

- The biggest differences occur at a regional level: **42% of Latin American internet users have "liked" a product in the last month,** a figure which compares to a more modest 27% in Europe. In fact, it's in some of the most mature internet markets that consumers are least likely to be doing this – with the lowest figures of all seen in the UK (29%), France (26%), Sweden (19%), Germany (17%) and Japan (just 6%).



Question: Which of the following brand related actions have you done in the past month? Liked a brand/product ///
Source: GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

Content-Driven Interactions: Rising in Importance

- Over a quarter of internet users say they are watching branded videos each month, reflecting **the rising importance of online content consumption.**

- Nearly 50% of active Facebook users say they have shared a branded photo in the last month (up four percentage points since 2012). Men are nearly 10% ahead of women, while 16-34s are more than twice as likely to do this as 55-64s. Parents – especially those with young children – also over-index.

- Sharing branded videos on Facebook has risen from 36% to 44% over the same period. Facebook's European and North American audiences are the least likely to do this – in line with a more general trend of **internet users in fast-emerging markets being the most engaged with brands.** These audiences are typically much more likely to talk about, advocate and interact with brands than consumers in more mature markets.

FACEBOOK ACTIONS

Question: Thinking about Facebook, could you please tell us if you have done any of the following in the past month (via any device)? ///
Source: GlobalWebIndex Q4 2013 /// **Base:** Active Facebook Users aged 16-64

Brand Talk

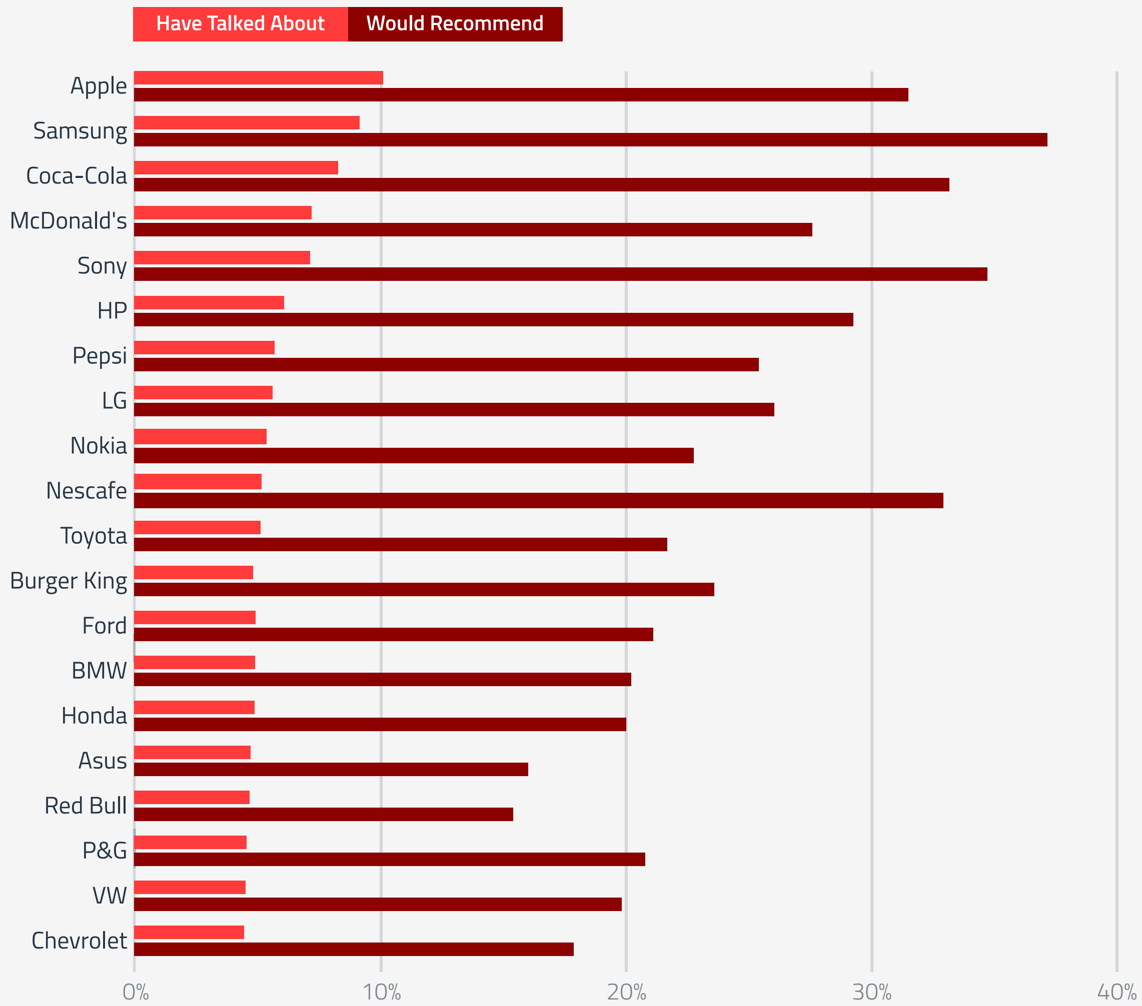
▪ Unsurprisingly, internet users say the **biggest driver for promoting a brand online is a reward –** whether that be financial or in the form of a gift. This motivates more than three fifths of the online audience, far outscoring any other option and carrying equal appeal across the gender, age, income and geographic splits.

▪ Nevertheless, **more than a third of the online audience are motivated by simple love of the brand or when something is relevant to their own interests.** Both are these factors are felt slightly more strongly by 16-34s than the other age groups, providing an opportunity to engage the younger audience.

▪ Technology and major FMCG/CPG brands are the most likely to feature in online conversations – with **Apple (10%) and Samsung (9%) receiving the most mentions.**

▪ Across every brand tracked by GWI, though, the numbers who say they would recommend them to friends/family are significantly higher than those who have talked about them online – often four or five times so. Clearly, this is a source of online advocacy which is not currently being tapped to its full potential – something of special importance given that **consumers consistently say that personal recommendations from friends/family are particularly valuable.**

TALKING ABOUT BRANDS: THE TOP 20



Question: Looking at the below list of companies can you tell us if you have discussed them online and would recommend them to friends and family? **Source:** GlobalWebIndex Q4 2013 /// **Base:** Internet Users aged 16-64

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