Europe

REGION REPORT

2017

www.globalwebindex.net

Introduction

REGION REPORTS TAKE AN IN-DEPTH LOOK AT THE PROFILE AND ACTIVITIES OF DIGITAL CONSUMERS WITHIN EACH OF THE WORLD REGIONS WHERE GLOBALWEBINDEX CONDUCTS RESEARCH. THIS REPORT PROVIDES THE VERY LATEST FIGURES AT A HEADLINE LEVEL AS WELL AS LOOKING AT TRENDS OVER TIME AND ACROSS DEMOGRAPHICS. IT ALSO EXAMINES IN DETAIL HOW THIS REGION COMPARES TO THE GLOBAL AVERAGE ACROSS KEY DIGITAL MEASURES AND BEHAVIORS.

In this report, we explore:

- The demographics, interests and attitudes of digital consumers in this region.
- How internet users are engaging with various devices, as well as how important these devices are to their digital lives.
- What social platforms are most important in this region, and how users are engaging with social media.
- How internet users are interacting with advertising and brands, how marketers can most effectively engage these consumers and what makes them complete a purchase online.

Contents

Understanding this Report

Sample for	2017*	Q2-Q3 2017	Sample for	2017*	Q2-Q3 2017
Belgium	5,000	2,531	Portugal	5,000	2,645
France	9,000	4,530	Russia	9,000	4,555
Germany	9,000	4,588	Spain	9,000	4,548
Ireland	5,000	2,550	Sweden	5,000	2,519
Italy	9,000	4,544	Turkey	6,000	3,021
Netherlands	5,000	2,517	UK	31,000	15,775
Poland	5,000	2,522			

** rounded sample sizes*

SOURCE, BASE AND INDEXES

Unless otherwise stated, all figures in this report are drawn from **GlobalWebIndex's Q2 and Q3 2017 waves of online research among internet users aged 16-64.** It can be assumed that the **Source** for each chart is 'GlobalWebIndex Q2-Q3 2017' and the **Base** is 'Internet users aged 16-64'. Where data appears from previous years, it is an average across all waves conducted throughout that year. All indexes presented in this report are against the global average among internet users aged 16-64.

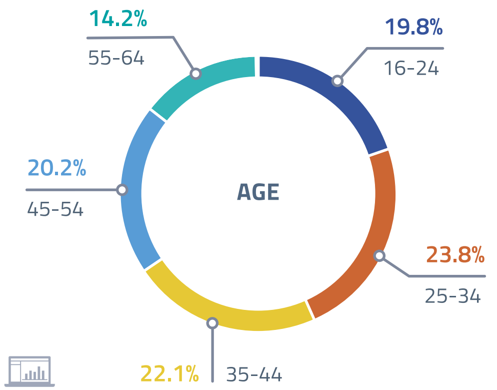
DISCOVER OUR DATA ON OUR PLATFORM

Each chart in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time and among custom audiences.

CLICK TO EXPLORE FURTHER

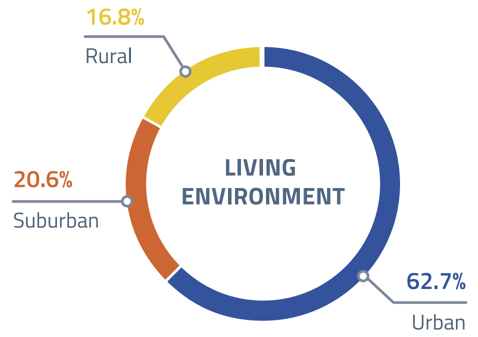
- Our full set of questions/data-points
- Our other reports and infographics
- Explanations of Segmentations or methodology

PROFILING INTERNET USERS



GENDER

49.5% 50.5%



EDUCATION

66.0% Secondary or Lower

34.0% Tertiary

PARENTAL STATUS

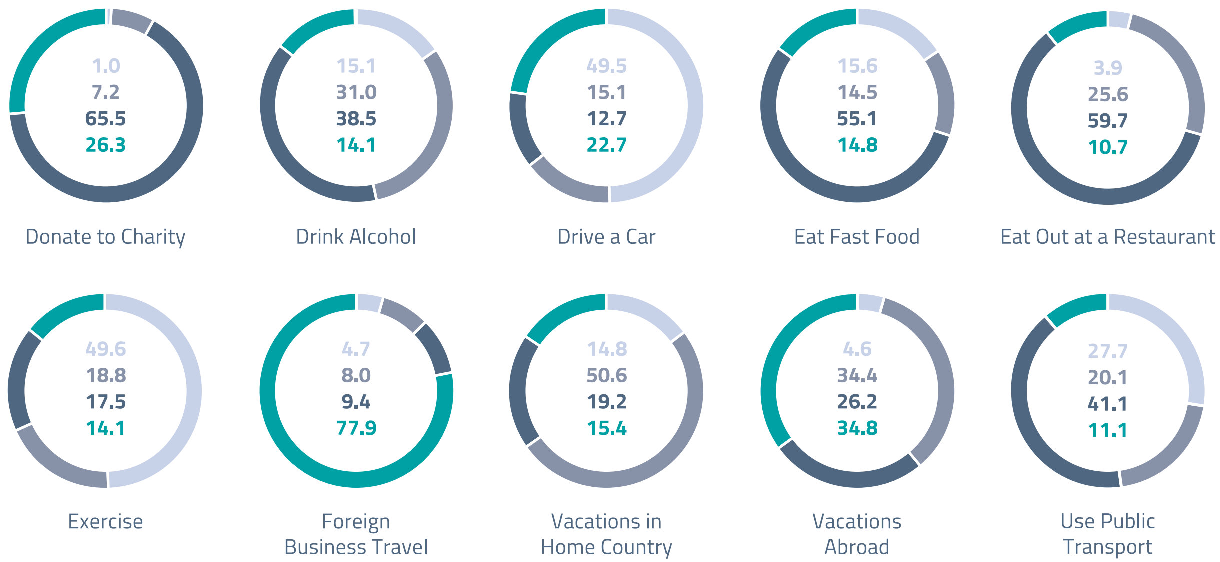
52.9% Parents

47.1% Not Parents

LIFESTYLE SEGMENTATION

% who fall into the following segments*

Regulars · Semi-Regulars · Occasionals · Non-Engagers



*For more information about how these segments are defined, please download this document

TOP 10 INTERESTS

% who say they are strongly interested in the following

	%	Index
Film / movies	60%	1.16
Music	56%	1.07
Books / reading	48%	1.17
Food / restaurants / cooking	46%	1.04
Television	45%	1.15
Travel and exploring new places	44%	1.19
News / current affairs	43%	1.13
Science and technology	38%	1.04
Personal healthcare	37%	1.20
Health and fitness	35%	0.97

REGION COMPARISON

Europe vs Global Internet Average

DEVICE

Most Important Device | *% who say the following are their most important devices for getting online*

	EUROPE	GLOBAL
Mobile	41%	62%
Laptop	29%	19%
Desktop PC	27%	18%
Tablet	4%	2%

Device Ownership

	EUROPE	GLOBAL
Smartphone	91%	94%
PC / Laptop	87%	76%
Tablet	47%	39%
Smart TV	34%	35%
Games console	29%	22%

Daily Time Spent Online on Mobile | *(HRS:MINS) (2017)*

	EUROPE	GLOBAL
Daily Time Spent Online on Mobile	02:05	03:03

Android vs iOS | *% using the following OS*

	EUROPE	GLOBAL
Android	68%	72%
iOS (for iPhone)	20%	25%

Device Sharing | *% **of users** who share their device with at least one other person*

	EUROPE	GLOBAL
Tablet	56%	60%
Mobile	23%	35%

Smartphone Purchase Timeframe

% who plan to purchase/upgrade their existing mobile in the next 12 months

	EUROPE	GLOBAL
Smartphone Purchase Timeframe	45%	58%

PRIVACY

	EUROPE	GLOBAL
Online Privacy Concerns *% concerned about the internet eroding their personal privacy*	52%	59%
Data Concerns *% who worry about how companies are using their personal data*	62%	62%

Privacy Safeguards | *% who did the following last month*

	EUROPE	GLOBAL
Deleted cookies	42%	47%
Used a private browsing window	28%	41%
Used a desktop ad-blocker	35%	38%
Used a mobile ad-blocker	20%	31%
Used a VPN to access the web	17%	25%

Top Reasons for Using Ad-Blockers

*% **of ad-blocker users** who say the following are their main reasons for blocking ads*

	EUROPE	GLOBAL
Too many ads are annoying or irrelevant	61%	52%
I think there are too many ads on the internet	59%	51%
Ads are too intrusive	56%	47%

REGION COMPARISON

Europe vs Global Internet Average

MEDIA CONSUMPTION

	EUROPE	GLOBAL
Cable / Satellite TV Subscription *% who say they are paying for a subscription TV service*	47%	57%
Online TV / Film Subscription *% who paid for an online TV / film subscription service last month*	13%	19%
Second-Screening *% who use an additional device to get online while watching TV*	76%	86%

Second-Screen Devices - Mobile vs. Laptop (2017) | *% who use the following to dual-screen*

	EUROPE	GLOBAL
Mobile	52%	71%
Laptop	35%	34%

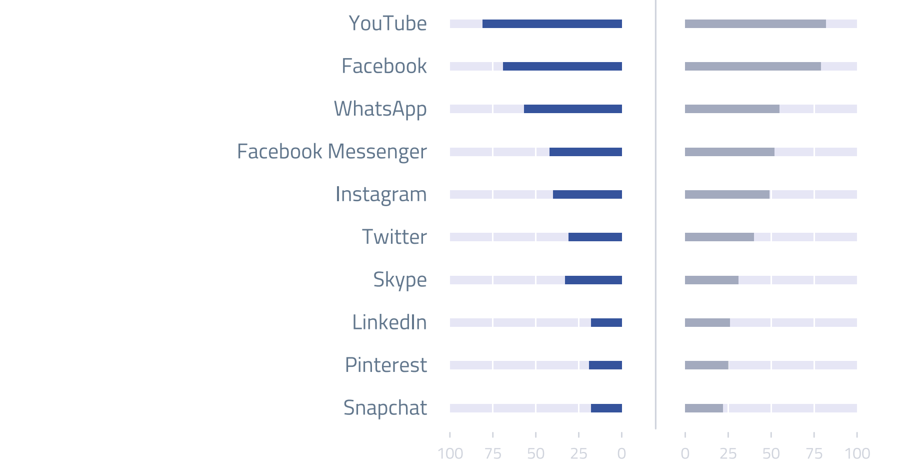
Top Second-Screen Activities | *% who do the following while second-screening*

	EUROPE	GLOBAL
Chatting to / messaging friends	40%	43%
Social networking	35%	42%
Emailing	35%	31%

SOCIAL

	EUROPE	GLOBAL
Daily Time Spent on Social Media | (HRS:MINS) (2017)	01:53	02:15
Average Number of Social Media Accounts	6.7	8.0
Following Brands on Social *% who say they follow brands they like on social media*	30%	37%

Top Global Social / Messaging Services | *% who visited/used the following services last month*



REGION COMPARISON

Europe vs Global Internet Average

COMMERCE

Buying Products Online | *% who purchased an item last month via the following*

	EUROPE	GLOBAL
Any Device	70%	75%
PC / Laptop	57%	49%
Mobile	31%	52%
Tablet	8%	9%

Mobile Payments
% who used a mobile payments service in the last month

EUROPE	GLOBAL
21%	33%

Digital Content
% who paid for some form of digital content last month

EUROPE	GLOBAL
38%	57%

Top Online Purchase Drivers | *% who say the following make them more likely to buy online*

	EUROPE	GLOBAL
Free delivery	71%	62%
Coupons and discounts	49%	48%
Consumer reviews	41%	38%

BRAND ENGAGEMENT

Top Sources of Brand Discovery | *% who say they typically hear about new products via the following*

	EUROPE	GLOBAL
Search engines	42%	37%
Ad seen on TV	39%	37%
Word-of-mouth recommendation	37%	33%

Top Online Research Channels | *% who say they research brands/products via the following*

	EUROPE	GLOBAL
Search engines	61%	52%
Social networks	35%	41%
Consumer reviews	40%	36%

Reviewers
% who reviewed a product online last month

EUROPE	GLOBAL
30%	44%

Top Drivers of Brand Advocacy | *% who say the following are reasons for them to promote a brand*

	EUROPE	GLOBAL
High-quality products	47%	49%
Rewards (e.g. discounts, free gifts)	54%	44%
Relevant to my own interests	30%	34%

OTHER REPORTS FROM GLOBALWEBINDEX:

- Mothers
- Vacation Buyers
- The Online Population
- Generations
- Understanding the Global Online Population
- Students
- Business Travelers
- Fitness Fanatics
- Millennials
- Generation Z
- Car Buyers
- Beauty Fans
- Sports

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Income (By Segment)
- Income (By Household)
- Interest in Further Education
- Country Local Regions
- Household Living Arrangement
- Relationship Status
- Pregnancy (Selected Markets)
- Sexual Orientation (Selected Markets)
- Ethnicity (Selected Markets)
- Car Ownership
- Property Ownership
- Property Rental
- Type of Savings/Investments
- Value of Savings/Investments
- Employment Status
- Sector/Industry
- Current Position/Role
- Company Size
- Area of Responsibility
- Responsibility for Food Shopping
- Self-Perceptions
- Internet Usage Motivations
- Frequency of Travel
- Frequency of Physical Exercise
- Participation in Sports
- Sports Leagues/Competitions Followed
- Voting Intention (UK/US Only)

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 1,300 BRANDS, INCLUDING:

AIRLINES

SPORTS BRANDS

SPORTS TEAMS

BANKS

ALCOHOL

Device Ownership and Usage

Across a range of metrics, smartphones are continuing to rise in importance. As well as being the most commonly-owned device in this region, they are also perceived to be internet users' most important internet access point. There are a handful of exceptions here though: internet users in France, Germany, and Belgium all still attach greater importance to their laptops than their mobiles. But across all markets, we're seeing more and more online behaviors migrate to smartphones, along with increases in the time spent online on them.

However, **we are not (yet) moving to a post-PC landscape**. Computers remain an important device, particularly in the realms of commerce and entertainment, and they continue to capture the biggest share of online time. Important to note here is that **multi-device usage is now the norm and mobiles are encouraging people to spend longer online**, rather than at the expense of their time on PCs/laptops.

While smartphones have risen to a position of importance in this region, **we are still waiting for the wearable revolution.** Ownership rates for smart wristbands and smartwatches remain low, and these devices are likely to remain a niche interest unless they can convince digital consumers that they possess functionality above and beyond those offered by smartphones.

Another device that has struggled over the past year is the tablet**. Although we saw explosive growth for tablet adoption in the early years of this decade, it's clear that a sense of fatigue has set in among tablet users.** Ownership rates have failed to reach the heights that many predicted they would and the growth in usage figures for these devices, that we have seen previously, has now peaked.

Looking at the habits of the youngest digital consumers gives us a clear indication of where device engagement trends in this region are moving. **By some margin, 16-24s identify smartphones as their most important device**, this group spends the longest time online each day on their mobiles and even though financial constraints clearly impact this demographic's spending power, it's a significant number who are planning to invest in a new smartphone within the next year.

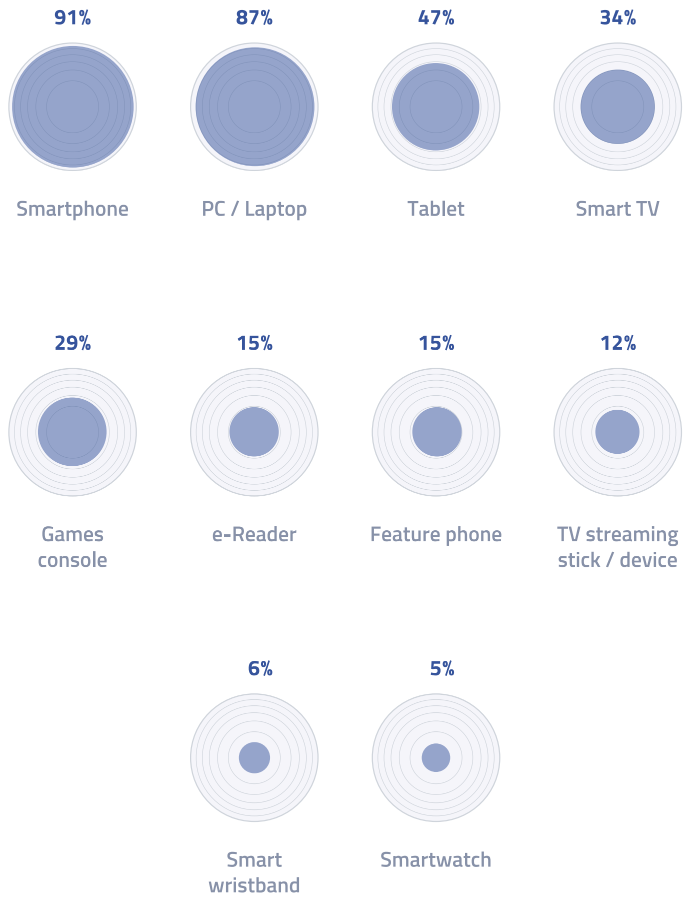
As smartphones, and online activities in general, become ever more important to digital consumers, it's clear that they are becoming more tech-savvy and more privacy-aware, and that many are deploying tools that control or improve their online experiences. **Using private browsing windows and regularly deleting cookies are now common activities in this region, while the ad-blocking trend has taken a firm hold.** Currently, it's younger internet users who are most likely to be using ad-blockers, with desktops the preferred device. However, it is a not insignificant number of older users who have taken to blocking ads and, although figures are currently lower than those seen for desktops, there is serious potential for ad-blocking on mobiles to become a mainstream activity in the future.

Although issues relating to privacy and practicality are important for ad-blocker users, **our research shows that it is ad-frustration that is the key driver of ad-blocker adoption**. The proliferation of irresponsible and irrelevant online advertising has been key here and unless these issues can be addressed, and consumers can be convinced of the merits of the value exchange between free content and advertising exposure, we are sure to see ad-blocking rates increase in the future, across both desktop and mobile.

Device Ownership and Preferences

DEVICE OWNERSHIP

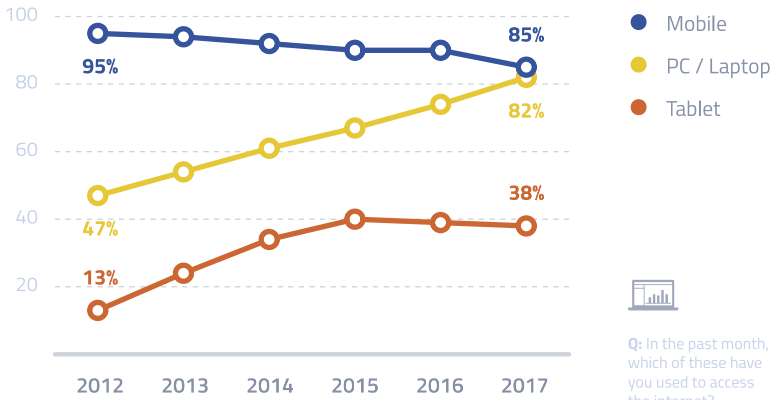
% who say they personally own the following



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

INTERNET ACCESS BY DEVICE

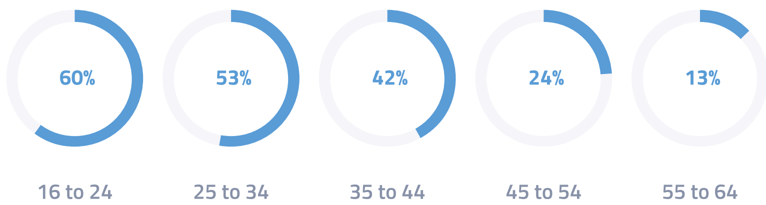
% who use the following devices to access the internet



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

SMARTPHONE IMPORTANCE

% who say their mobile is their most important device



Q: Which would you say is the most important device you use to access the internet, whether at home or elsewhere?

RESPONDENTS SEE THE FOLLOWING DEFINITIONS & ILLUSTRATIVE EXAMPLES

e-Reader: a digital reading device, e.g. Amazon Kindle, Kobo, Nook etc

Smart TV: a television that can connect to the internet

Smart wristband: a digital wristband which typically tracks your health and fitness levels. Popular examples include Nike Fuelband, Jawbone Up and Fitbit

Smartphone: an internet and app-enabled phone such as the iPhone, a BlackBerry or Android phones like the Galaxy S series

Smartwatch: a watch which allows you to connect to the internet and use apps. Popular smartwatches include Pebble, Sony Smartwatch, Samsung Galaxy Gear and the Apple Watch

Tablet device: e.g. an Apple iPad, Samsung Galaxy Tab, Microsoft Surface, Google Nexus tablet

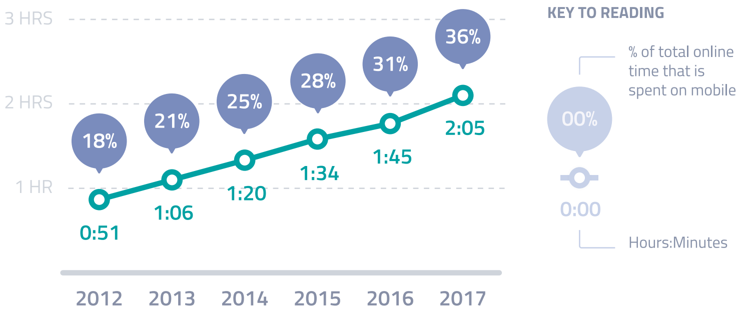
TV streaming stick/device: a digital media device which streams web content to your TV set, e.g. Apple TV, Amazon Fire TV Stick, Google Chromecast, Roku Streaming Player

DEVICE OWNERSHIP AND USAGE

Time Spent Online and the Mobile Marketplace

TIME SPENT ONLINE VIA MOBILE

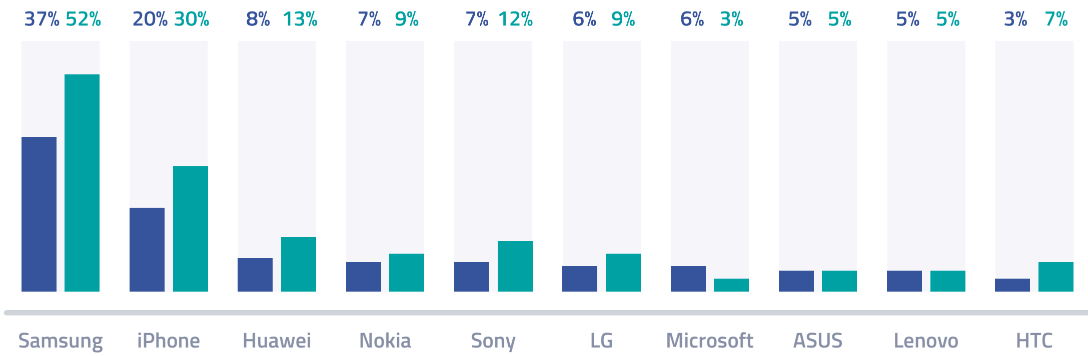
Number of hours and minutes per day typically spent online on mobile



Q: Roughly how many hours do you spend online on a mobile during a typical day?

TOP 10 MOBILE HANDSET BRANDS

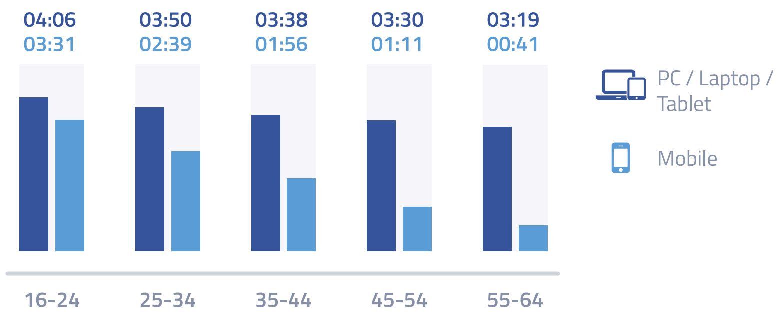
% who own/would purchase the following handsets



Q: Which of the following mobile brands do you currently own?
Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone?

TIME SPENT ONLINE BY AGE | 2017

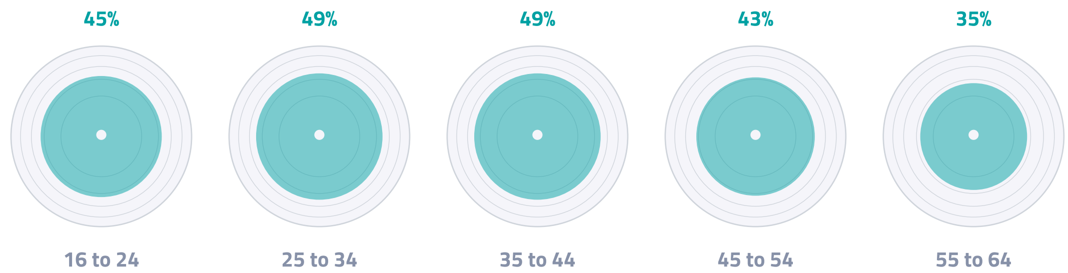
Number of hours and minutes per day typically spent online on...



Q: Roughly how many hours do you spend online via the following each day?

MOBILE PURCHASE TIMEFRAME

% who say they plan to buy a new phone or upgrade their existing handset in the next 12 months

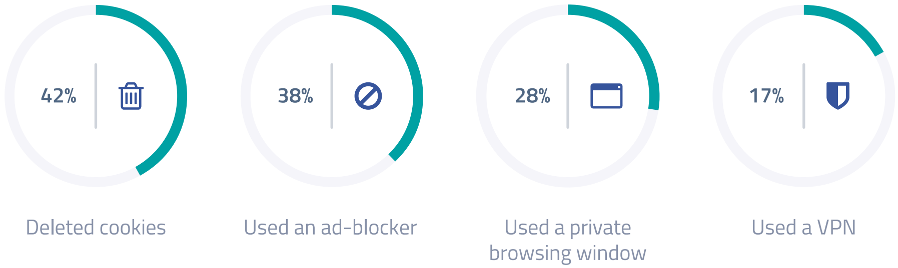


Q: When do you plan to buy a new mobile phone or upgrade your existing phone?

Ad-Blocking and Privacy Tools

PRIVACY TOOLS

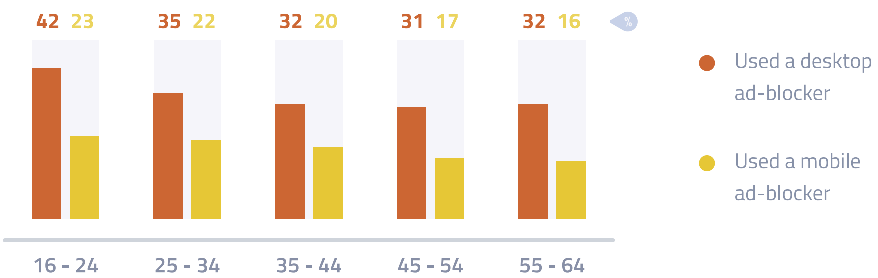
% of internet users who have done the following within the last month



Q: Which of the following have you done in the last month?

AD-BLOCKING BY AGE

% of internet users who have done the following within the last month



Q: On average, how frequently do you use an ad-blocker on the following?

MOTIVATIONS FOR USING VPNS AND AD-BLOCKERS

% of VPN/Ad-Blocker users who cite the following as their main reasons

Top 5 reasons for using VPNs among VPN users

To keep my anonymity while browsing	37%
To access better entertainment content (e.g. TV shows / films / music)	37%
To access sites / files / services at work	24%
To access restricted download / torrent sites	24%
To access social networks, websites or news services	23%

Top 5 reasons for using ad-blockers among ad-blocker users

Too many ads are annoying or irrelevant	61%
There are too many ads on the internet	59%
Ads are too intrusive	56%
Ads take up too much screen space	43%
Ads sometimes contain viruses or bugs	42%

Q: Can you please tell us why you use VPNs or proxy servers when browsing the internet?
Q: Please could you tell us your main reasons for blocking ads while you use the internet?

OTHER REPORTS FROM GLOBALWEBINDEX:

- GWI Device
- The Rise of Ad-blocking
- Profiling the Mobile-Only Audience
- Virtual Reality
- Ad-Blocking
- The Smartphone Marketplace
- Tablet Fatigue
- Mobile Ad-Blocking
- Early Tech Adopters
- The Missing Billion
- VPN Usage Around the World

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Device Sharing
- Device Satisfaction
- Console Brands
- PC/Laptop Operating Systems
- PC/Laptop Web Browsers
- Tablet Operating Systems
- Mobile Network Providers
- HTC Models
- Huawei Models
- iPhone Models
- LG Models
- Samsung Models
- Sony Model
- Mobile Actions in the Last Month
- Smartwatch Brands Owned (UK/US Only)

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 1,300 BRANDS, INCLUDING:

TECHNOLOGY BRANDS

MOBILE PAYMENTS

PAYMENT PROVIDERS

Media Consumption

Segmenting digital consumers by their engagement levels with a selection of media underlines the importance of social media within daily habits. Compared to cinema, broadcast radio, print press, online press and games consoles, **it's social networking which sees the strongest results for "heavy users"** within our segmentation, and by some distance. That only a small minority can be classified as "non-users" of social media gives another indication of how integral this activity has become within daily behaviors.

However, it should be noted that many of these media activities are not happening sequentially. Rather, the widespread nature of simultaneous media consumption and, in particular, the reality that the **vast majority of internet users go online while they watch television** mean that few media activities are happening in isolation.

The rise of mobile is once again a key story, with this device now the top choice for TV viewers looking to get online. In some European markets, **the challenges facing tablets** are present once again; although they had previously been enjoying strong increases for this behavior, the picture now is different . But Belgium, France, Ireland, Spain and Sweden are exceptions to the rule here, where second-screening via tablets has seen small but significant increases since 2015.

Social activities form the core of digital consumers' second-screening habits, with using social media and messaging friends popular activities for TV viewers. And while it is true that some consumers are happy to interact with the online content of TV shows or engage in discussion of the TV shows they watch, the reality is that **most second-screen activities are a distraction from the content being watched on the main screen**, rather than a complement.

Gaming is also a key dual-screening activity, accentuating further research that shows that **the majority of internet users are regularly gaming in some way.** PCs and smartphones remain the most popular devices for gaming, while the lower figures we see here for using games consoles and tablets to game can be attributed to their relatively lower ownership rates. Among those who do use a games console, the PlayStation 4 and PlayStation 3 are the most popular machines, while the PS4 emerges as the most desired games console.

However, with the migration of gaming activities online, and the subsequent expansion of the gaming community, **a whole host of behaviors now fall within the remit of 'gaming'**. Among the specific gaming activities tracked by GlobalWebIndex, numerous 'non-traditional' gaming activities point towards the future of this medium. For example, it's now a decent number of internet users (primarily from younger groups) who say they watch live gaming streams online or watch e-sports tournaments. These formats are still very much evolving as a platform for brands and advertisers, but the potential here is clear.

Types of Media Consumed and Second-Screening

MEDIA CONSUMPTION SEGMENTATION

Engagement levels with the following forms of media*

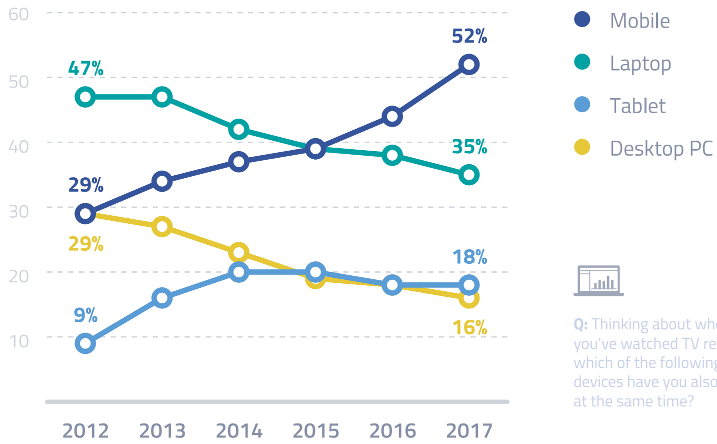
	Non-Users	Light	Medium	High	Heavy Users
Cinema	11.8%	47.9%	24.5%	14.4%	1.3%
Broadcast Radio	19.8%	34.4%	17.9%	19.5%	8.4%
Physical Press	28.9%	46.2%	15.5%	8.0%	1.3%
Online Press	28.2%	38.9%	19.6%	9.4%	3.9%
Social Networks / Services	11.5%	21.7%	21.8%	16.7%	28.3%
Games Consoles	47.3%	26.3%	10.0%	10.9%	5.5%

**For more information about how these segments are defined, please download this document*

Q: Roughly how many hours do you spend on/engaged with the following each day?
(Except Cinema: On average, how often would you say you do the following things?)

SECOND-SCREENING

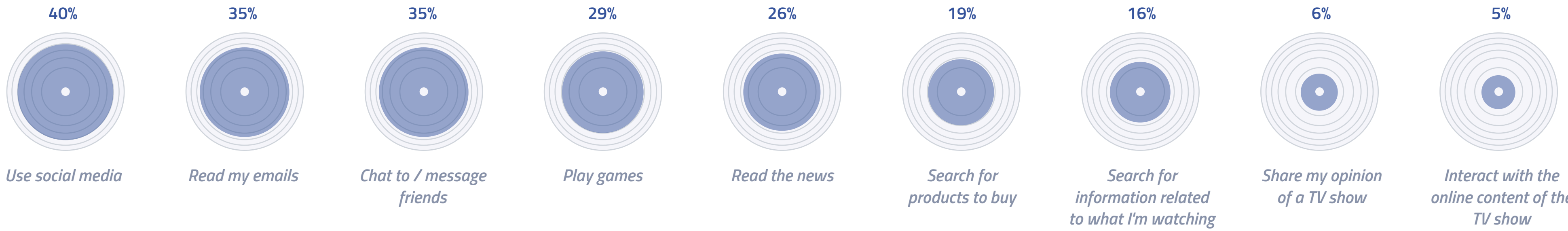
% who second-screen via the following devices



Q: Thinking about when you've watched TV recently, which of the following devices have you also used at the same time?

SECOND-SCREENING

% who are doing the following when second-screening



Q: When watching TV, which of these things do you often do on another device at the same time?

Gaming Devices and Activities

GAMING DEVICES

% who have used the following to play games

- 51% PC / Laptop
- 48% Smartphone
- 24% Games console
- 24% Tablet
- 7% Handheld gaming device
- 2% Feature phone
- 2% Media streaming device
- 20% None of the above

Q: Which of these devices do you use to play games?

GAMING ACTIVITIES

% who have done the following gaming-related activities in the last month

14% - IDX 0.47
Played a game that you have streamed over the internet

14% - IDX 0.74
Watched a live gaming stream

13% - IDX 0.92
Purchased a video game from an online store

12% - IDX 0.96
Connected a games console to the internet in order to play games

9% - IDX 0.86
Purchased a game add-on or DLC (Downloadable Content)

9% - IDX 0.88
Used a subscription service

8% - IDX 0.54
Watched an e-sports tournament

4% - IDX 0.56
Broadcast a live stream of your gameplay

Q: Which of the following gaming-related activities have you done in the last month?

OTHER REPORTS FROM GLOBALWEBINDEX:

- GWI Entertainment
- Cinema Goers
- TV Buyers
- Premier League Fans
- Gaming
- Podcast Listeners
- F1 Fans
- Online TV
- Sports Fans
- Second-Screening

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Online Activities
- Pay TV Subscriptions
- Content Services
- Digital Content Purchased

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 1,300 BRANDS, INCLUDING:

FILM FRANCHISES

GAMING FRANCHISES

Social Media

Being an internet user means being a social networker. Practically all digital consumers in this region have at least one social media account and have used social media in some form in the last month. Meanwhile, daily time spent on social media continues to rise. The ubiquity of social media usage and its continuing importance to the daily lives of digital consumers can be firmly attributed to the rise of the smartphone. That said, unlike globally where social engagement is now mobile-first, **PCs/laptops remain the primary device for internet users in this region looking to access social media**.

The increasing importance of the smartphone to social activities has also been one of the key drivers behind two important trends in the social space – multi-networking and passive networking. **Internet users are now comfortable maintaining a portfolio of social media accounts**, turning to each for particular activities and to engage with specific social groups, and the anytime-anywhere access that smartphones provide has made it simple to manage this array of social profiles.

However, it's also true that **on certain major networks, users' activities are becoming more passive in nature**, as engagement with these platforms becomes more frequent but less prolonged, and as social networkers become more selective about where they share their personal content. All that said, however, **on most of the major platforms, the majority of members are visiting/using on a monthly basis, ensuring that ads and content can be delivered and revenues generated.**

Within this context, **social video and social commerce present two significant opportunities for the industry**. As we will see later, social stands to become an even more important part of the online purchase journey and that **significant numbers say they are following brands they like on social media** emphasizes the opportunities that exist, provided the functionalities are implemented properly. In the realm of video, social could also play a key role, particularly as so much time is committed to social media each day and that **many social networkers identify entertainment as a key reason behind their social media usage.**

As in most markets, **Facebook remains in prime position within the social media industry**. The vast majority of digital consumers are using at least one of Facebook's platforms, with usage of Facebook itself continuing to be almost universal . **The one platform that can truly challenge the reach of Facebook is YouTube**, which is also notable for drawing in more visitors/users than it has members (a result of many visitors to the site not feeling the need to sign up for an account). Nevertheless, it's important to keep in mind that, along with WhatsApp, Facebook typically scores the best numbers for "more than once a day" when we ask people how frequently they visit various social platforms.

Elsewhere, **Snapchat might post a relatively modest figure among the total online population but its popularity among younger demographics is considerable** . Look just at Gen Z (defined here as 16-20s) and usage rates jump considerably, with as many as 7 in 10 Gen Zers using Snapchat each month in the UK and France.

Social Media Engagement and Behaviors

SOCIAL MEDIA BEHAVIORS

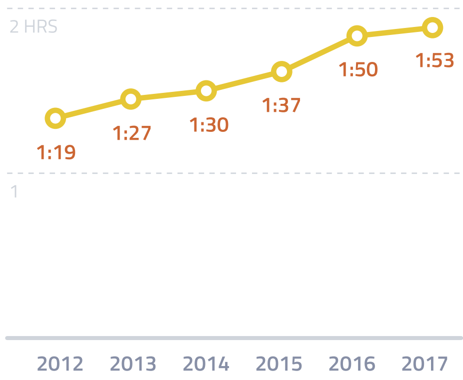
6.7 Average number of social media accounts

94% have at least one social media account

97% have visited / used a social network in the last month

80% have engaged with / contributed to at least one social network within the past month

Daily time spent social networking and messaging



NOTE

Average number of accounts is calculated based on analysis of 44 named networks + "Other". Of the 44 individual platforms, 23 are global and 21 are specific to certain countries or regions

Q: Roughly how many hours do you spend engaging with / connected to social networks or services during a typical day?

TOP 5 MOTIVATIONS FOR USING SOCIAL MEDIA

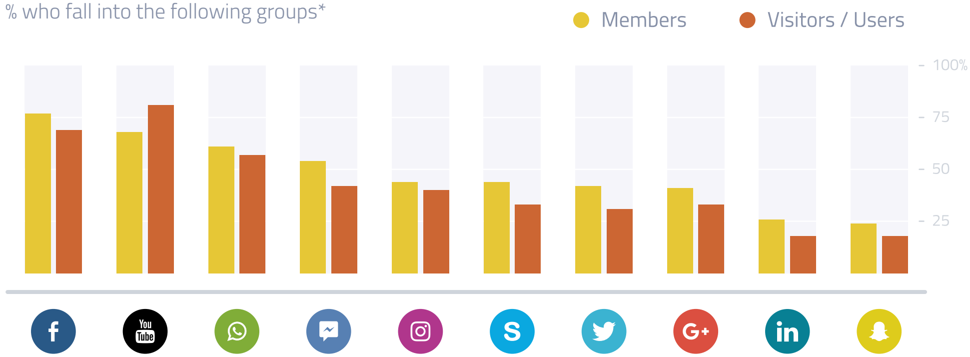
% who use social media for the following reasons

		IDX
47%	*To stay in touch with what my friends are doing*	1.08
42%	*To fill up spare time*	1.05
41%	*To stay up-to-date with news and current events*	0.98
37%	*To find funny or entertaining content*	1.00
32%	*General networking with other people*	0.94

Q: What are your main reasons for using social media?

TOP 10 SOCIAL PLATFORMS

% who fall into the following groups*



*DEFINITIONS:

Members - People who say they have an account on the platform in question.

Visitors / Users - People who say that, within the last month, they have visited or used a social network's website or app via any device.

Q: On which of the following services do you have an account?
Which of the following sites/applications have you visited / used in the past month via your PC/Laptop, Mobile or Tablet?

TOP 5 TYPES OF PEOPLE/ORGANIZATIONS "FOLLOWED" ON SOCIAL MEDIA

% who say they "follow" these types of people/organizations

30%	Singers, musicians or bands	IDX 0.99
30%	Brands you like	IDX 0.83
25%	News / media organizations	IDX 0.83
24%	Contacts relevant to your work	IDX 0.83
21%	Actors	IDX 0.70

Q: Who do you follow on social media?

OTHER REPORTS FROM GLOBALWEBINDEX:

- GWI Social
- Brand Followers
- Social Media Engagement
- Social Media Motivations
- The Social Media Landscape
- Social Commerce

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Usage Frequency
- Social Media Segmentation
- Facebook Actions
- Facebook Messenger Actions
- Instagram Actions
- Snapchat Actions
- Twitter Actions
- WeChat Actions
- WhatsApp Actions
- YouTube Actions
- App Types Used
- Named Apps Used

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 1,300 BRANDS, INCLUDING:

AUTOMOTIVE

FAST FOOD

DRINKS

The Online Purchase Journey

At the very start of the purchase journey, **when consumers are discovering new products or services, it's important to note that more 'traditional' channels still have an important role to play**. TV advertisements and search engines post high figures here, while peer-to-peer recommendations are also influential. **That said, the importance of digital is plain to see** – it's now 29% of digital consumers who say they find new brands from ads they see online. As might be expected, digital channels are most impactful on younger consumers (who tend to spend the longest time online) while more established platforms have a stronger appeal to older consumers.

It's at the next phase of the purchase journey – the research phase – where newer digital forms really make their mark. In particular, when consumers are aware of a brand/product and are looking for more information, it's now 35% who say they turn to social media. This is a key factor underpinning the potential of social commerce, as discussed above, and considering younger consumers are the most likely to be using social for product research, it may not be long before we see social overtake search as the most important portal for consumers looking to research products online .

Online commerce is an absolutely mainstream activity; 70% of online adults say that they've recently bought a product on the internet, although figures do drop to the 52% mark in Portugal. **Currently, PCs and laptops remain integral to this process;** as our data shows, almost everyone who is purchasing online is making at least *some* of their transactions on these devices. **Although mobiles have overtaken computers for many online activities, when it comes to completing a purchase online, digital consumers are still most likely to turn to a PC or laptop in all markets with the exception of Turkey**. Highly relevant here is that PCs and laptops are still perceived by many to offer the best functionality and security when it comes to purchasing.

When it comes to what influences an online shopper to complete a purchase, the availability of free delivery is by far the most important factor (as it is across all of our 40 markets). The importance of offering free delivery to shoppers cannot be over-stated, particularly as this is a purchase driver that is of paramount importance across all the major demographic breaks. Optimizing the customer experience while shopping also emerges as a key factor for consumers, with a quick and easy checkout process falling within the top 5 purchase drivers. Meanwhile, compared to the global average, consumers in this region over-index the most for valuing the option to checkout as a "guest".

After purchase, **it's 30% of internet users who are regularly posting online reviews,** with Italy (39%), Spain (36%) and Turkey (35%) being the most vocal reviewers. Considering online reviews are an important purchase driver and word-of-mouth recommendations remain key brand discovery routes for consumers, the importance of gaining brand advocates is clear. It's high-quality products and rewards (such as discounts and gifts) that emerge as the two most important motivators of online brand advocacy, with internet users here most ahead of the global average for being influenced by rewards.

From Discovery to Purchase

TOP 5 CHANNELS FOR BRAND/PRODUCT DISCOVERY

% who say they discover brands/products via the following sources

42%	Search engines	IDX	1.11
39%	Ad seen on TV	IDX	1.03
37%	Word-of-mouth recommendation	IDX	1.08
29%	Ad seen online	IDX	0.94
23%	Product comparison websites	IDX	1.09

Q: In which of the following ways are you most likely to find out about new brands, products, or services?

TOP 5 BRAND/PRODUCT RESEARCH CHANNELS

% who say they use the following when looking for more information about a brand/product

61%	Search engines	IDX	1.14
40%	Consumer reviews	IDX	1.10
35%	Social networks	IDX	0.85
32%	Price comparison websites	IDX	1.19
30%	Product / brand sites	IDX	0.96

Q: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?

TOP 5 PURCHASE DRIVERS

% who say the following would make them more likely to purchase a product online

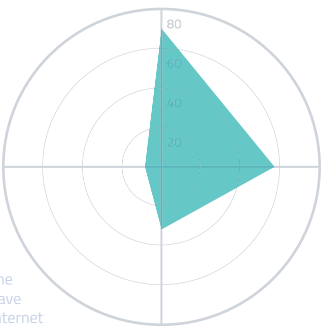
71%	Free delivery	IDX	1.11
49%	Coupons and discounts	IDX	1.02
41%	Reviews from other customers	IDX	1.08
39%	Easy returns policy	IDX	1.08
34%	Quick / easy online checkout process	IDX	1.07

Q: When shopping online, which of the following things would increase your likelihood of buying a product?

ONLINE PURCHASING

% who have bought a product online in the last month via...

Any Device 70%



Tablet 8%

PC / Laptop 57%

Mobile 31%

Q: In the past month, which of the following things have you done on the internet via any device? Purchased a product online

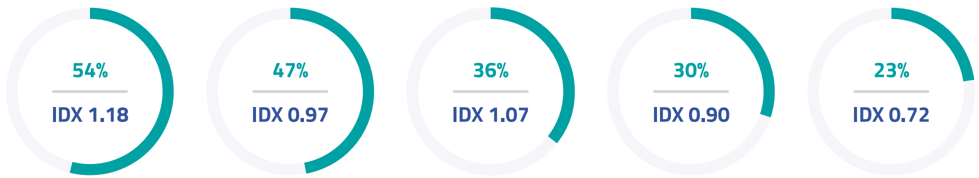
ONLINE REVIEWING & TOP 5 REASONS FOR BRAND ADVOCACY

30%

have posted a product / company review in the past month

Q: In the past month, which of the following things have you done on the internet via any device? Posted a review of a product, service or company | What would most motivate you to promote your favorite brand online?

% who say they would advocate a brand online for the following reasons



Rewards (e.g. discounts, free gifts, etc)

High-quality products

When I've received great customer service

When something is relevant to my own interests

Love for the brand

OTHER REPORTS FROM GLOBALWEBINDEX:

- GWI Commerce
- Brand Followers
- Online Banking in Europe
- The Online Purchase Journey
- Vacation Buyers
- Brand Advocacy
- TV Buyers
- Brand Discovery
- Business Leaders
- B2B Buyers
- Purchase Drivers
- Car Buyers
- Eco-Consumers
- Early Tech Adopters
- Mobile Payments

OTHER QUESTIONS CAN BE EXPLORED ON OUR PLATFORM, INCLUDING:

- Online Purchasing (by Category)
- Online Research (by Category)
- Digital Content Purchased
- Mobile Payment Services
- Products/Topics Talked About Online
- Brand Role in Consumer's Life
- Online Brand Interactions in Last Month
- B2B Marketing Influencers

GLOBALWEBINDEX NOW RESEARCHES ENGAGEMENT WITH OVER 1,300 BRANDS, INCLUDING:

HAIRCARE/SKINCARE/COSMETICS

LUXURY FASHION

RETAILERS

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 POPULATION** OF EACH MARKET, NOT ITS TOTAL POPULATION.

OUR RESEARCH

Each year, we interview 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 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.

Here is an example of the process (from France)

The UN World Population Division estimated that the total population of France in 2015 was 64.4 million. It also estimated that 62% of these individuals – or 40.2m – were aged 16-64. From Eurostat and other sources, we know the percentage in each age, gender and educational group who have used the internet in the last year. By multiplying these two datasets together, we know the number of 16-64s in France that are internet users and, as we have data in each age, gender and education group, we can then create quotas to ensure we interview the correct number of people in each demographic split and correctly calculate each respondent's 'weight'.

In advance of newer data for 2017 becoming available, GlobalWebIndex then models long-term statistics about the country's population structure and the year-on-year growth in its internet penetration rate to predict how this is likely to have changed in subsequent quarters. That allows us to project 2017 universe figures for each country, which will be reviewed and updated as and when new official data is published.

INTERNET PENETRATION RATES ACROSS 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.

ITU INTERNET PENETRATION METRIC 2016

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

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

More from GlobalWebIndex

REPORTS

FLAGSHIP REPORTS
Our flagship reports present insights and statistics on social networking, device usage, online purchasing and entertainment.

MARKET & REGION REPORTS
Tracking key digital behaviors and engagement rates at a national or regional level, providing the very latest headline figures as well as looking at trends over time and across demographics.

AUDIENCE REPORTS
In-depth examinations of particular groups, assessing their most important behaviors and motivations as well as what sets them apart from the wider online population.

INSIGHT REPORTS
Deep-dives into some of the most pressing topics for marketers, from traditional vs digital media consumption to audience measurement issues.

TREND REPORTS
Tracking the stories of the moment, from ad-blocking and live streaming to VPNs and multi-networking.

INFOGRAPHICS
One-page visual summaries of key services, behaviors & audiences.

To see all of our available reports

CLICK HERE

OUR PLATFORM

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.

CLICK HERE *To start a Platform free trial*

GWIQ

GWIQ offers clients the ability to create bespoke audiences on the platform by connecting the GWI panel and passively monitored visitation to their own websites/campaigns. Segment your visitors by the actions taken on your site then profile them utilizing the 100% declared data you already find in the Platform. Validate digital campaigns against rich targets far beyond demographics. Understand the impact of digital campaigns on brand perceptions by sending bespoke advertising effectiveness surveys to panelists using a control vs exposed methodology.

CLICK HERE *To find out more about GWIQ*

CUSTOM

GlobalWebIndex can also offer a variety of custom solutions to suit all your data and insight needs. All projects are conducted in close consultation with clients and resulting data is available for analysis in our Platform.

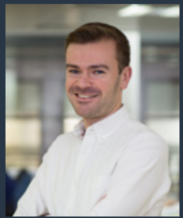
Our Custom offerings include:

BRAND SOLUTIONS
Brand Health
Brand Tracker
Brand Profiling

PRODUCT SOLUTIONS
Usage and Attitudes
Concept Testing

CAMPAIGN & AUDIENCE SOLUTIONS
Segmentation
Campaign Measurement
Audience Profiling
Audience Targeting

CLICK HERE *To find out more about Custom*



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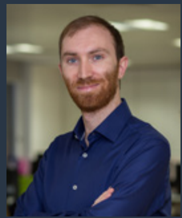

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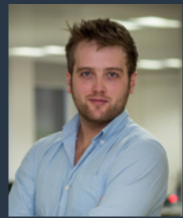

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