globalwebindex

Brand Advocacy

Examining which groups are promoting brands and the motivations behind brand advocacy

INSIGHT REPORT 2019

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Introduction

GlobalWebIndex Insight reports take a deep-dive into the crucial topics of the industry. In this report, we focus on the factors influencing consumers to promote brands online.

Among others, this report covers the following topics in detail:

01 Who's most likely to post online reviews and on what devices?

02 What do brands need to provide to motivate consumers to promote them online?

03 How does brand advocacy differ by generation and location?

04 How is brand advocacy on social media taking place and how can brands in the food industry encourage endorsements on these channels?

05 Which brands convert the most consumers to advocates in the gaming and luxury fashion industries?

METHODOLOGY

When reading this report, please note that we use a mixture of global data, and data specific to the U.S. and UK. We typically use global data to analyze the brand advocacy landscape across demographics, regions and countries, and use data specific to the U.S. and UK to understand advocacy in regards to specific industries.

GlobalWebIndex's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please click **here**.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Key Insights

The anywhere, anytime access of mobiles has made online reviewing especially popular.

In 19 out of the 41 markets we track brand advocacy, there are more people writing reviews than there are using them for product research. This is primarily facilitated by the smartphone, with 32% of internet users today posting reviews from their mobiles, up from 26% in 2017. Those in fast-growth regions are a lot more vocal online than their mature market counterparts. A brand's status is more important in developing markets as a motivation for brand advocacy compared to mature markets, where practicality and customer care take precedence.

Online reviewing is more prominent among younger consumers.

Broadly speaking, younger groups are much more likely to post reviews, yet they tend to use them less for informing purchasing decisions. What a brand means to their image and online reputation is paramount, as is what a brand can offer them in terms of exclusive content. Older groups are much less likely to post online, but they tend to use reviews more when researching products. Personal experience with a brand (i.e. customer service) and financial incentives carry more weight with these consumers.

User-generated-content on social media is thriving, especially in the food industry.

Social networks have provided one of the most effective and cost-efficient ways for companies to raise brand awareness. Almost 4 in 10 globally are now following brands they like, showing that consumers like to see branded content on their newsfeeds. And with almost a third of internet users finding inspiration for restaurants they visit from friends' posts on social media, it's clear that food-related user generated content on social media presents marketers with great opportunities to promote their offerings.

Quality products motivate endorsements the most.

More traditional brand advocacy incentives still make the most impact across all of the main demographic and regional splits. Globally, 48% of internet users say that high-quality products would motivate them to promote a brand online, making this the most important incentive among the 11 brand advocacy motivations we track.

Consumers in the gaming and luxury fashion industries are great brand ambassadors.

Console gamers are 34% more likely than average to advocate a brand if they have access to exclusive content or services. As a reflection of these gamers' young profile, enhancing their reputation and status is also likely to encourage them to endorse their favorite brands online. Luxury fashion buyers, on the other hand, want to ensure that their money goes a long way, with high quality products and great customer service being the most prominent expectations they have from brands.

01

Brand Advocacy

The Power of Online Reviews

Posting vs Reading Reviews

With 76% of internet users buying products online each month, it has never been more essential for brands to have a strong online presence. Ecommerce is now mainstream and peer-to-peer recommendations have thrived, allowing consumers to voice their opinions on products and services across a variety of channels.

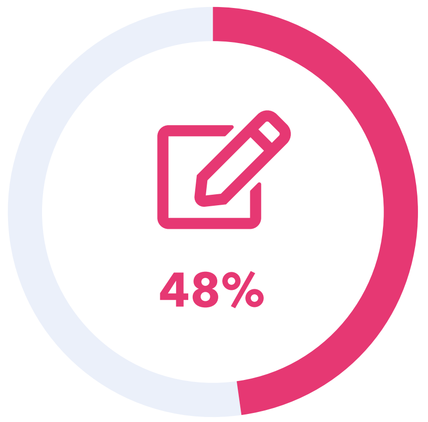
Globally, almost half of internet users have posted a review of a product or service in the past month, a figure that has consistently increased over the past two years from 42% in Q2 2017. **However, there are many more people posting reviews than those using them to inform their purchasing decisions** (36% are using consumer reviews for product research).

This is subject to considerable demographic and regional variation. **Younger groups are much more vocal online, particularly 25-34s.** But the usage of consumer reviews for product research rises directly with age, albeit with only a six-percentage-point difference between our youngest and oldest internet users. In fact, 55-64 year-olds are the only demographic cohort who are more likely to use than to write reviews.

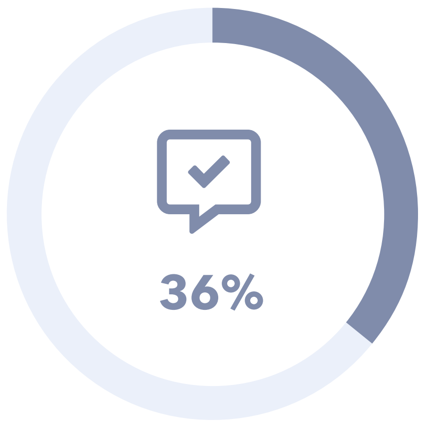
It's mainly in the regions characterized by fast-growth markets – LatAm, the Middle East & Africa and APAC – where reviewers outnumber those actively using recommendations and reviews, so cutting through the noise in these regions is key. Indonesia (66%), China (62%) and India (60%) are most ahead for online reviewing; **China, in particular, has twice the number of users posting reviews than those actively looking for them**. In contrast, North America and Europe (where online populations skew toward older internet users) are where we see similar figures between the two groups.

ONLINE REVEWS

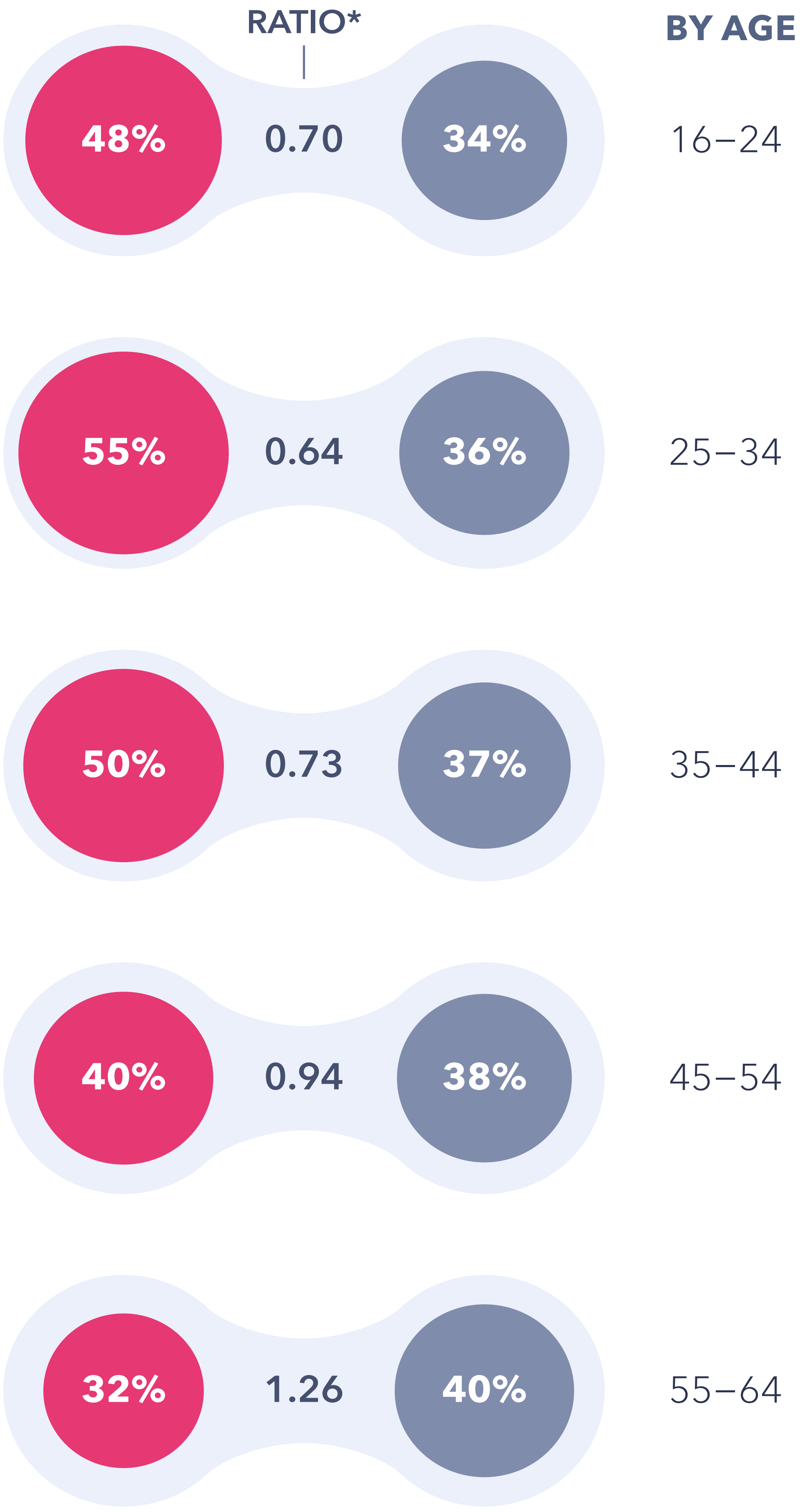
% of internet users who have done the following



Posted a review of a product, company or service in the last month



Use consumer reviews when researching products



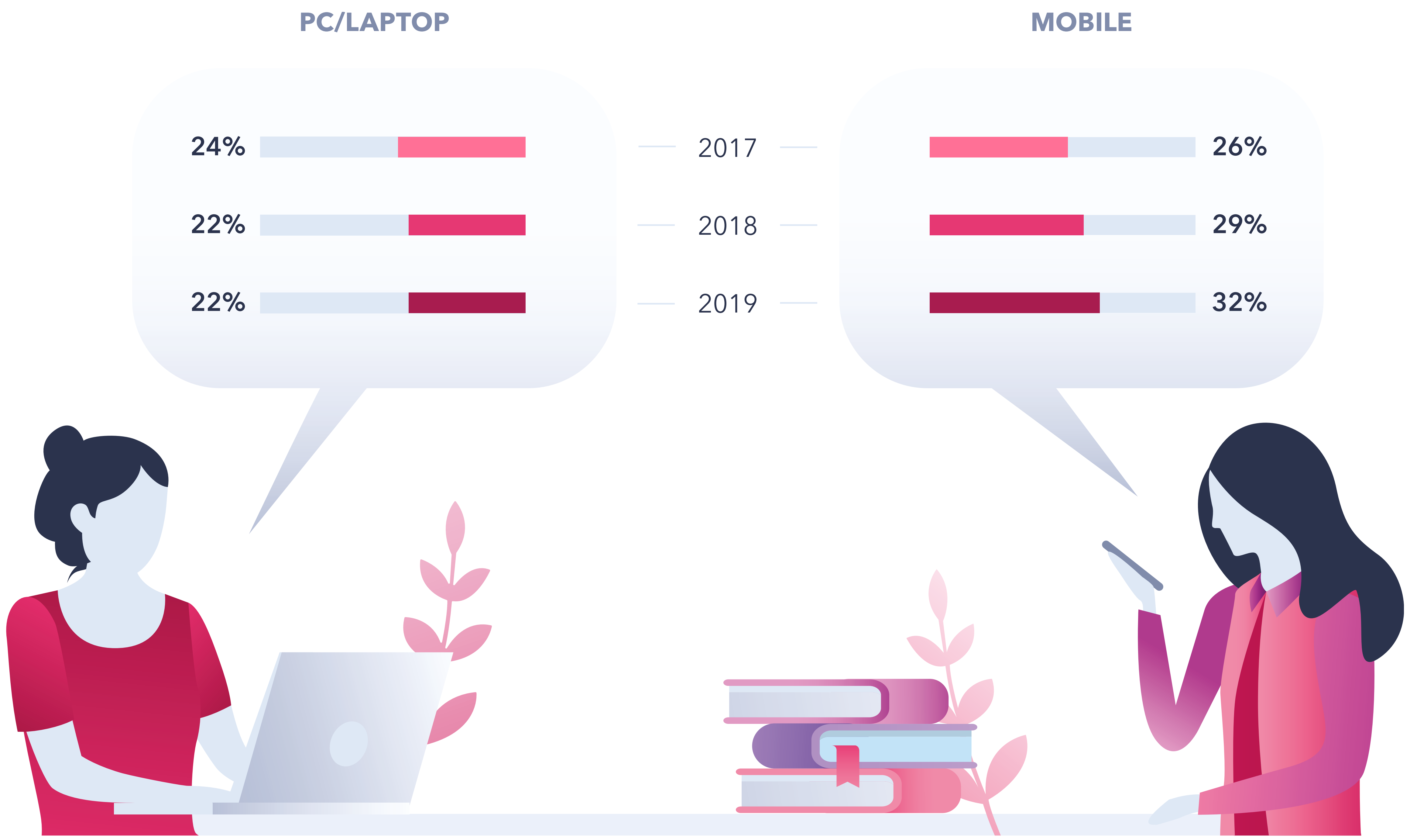
*A ratio below 1 means they're more likely to post than to use reviews, whereas a ratio above 1 means they're more likely to use reviews than post them.

Questions: In the past month, which of the following things have you done on the internet via any device? (Posted a review of a product, company or service) // Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? (Consumer reviews) **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

Online Reviewing by Device

ONLINE REVIEWING BY DEVICE OVER TIME

% who have posted a review of a product, company or service in the last month via the following devices



The mobile is internet users' device of choice for online reviewing.

Two years ago, PCs/laptops and mobiles were neck-and-neck as the most important device for posting reviews, but since then mobiles have steadily gained momentum. There is now a 10-percentage-point gap between the two devices for posting online reviews, with a third posting reviews via mobile each month (rising to 41% in APAC). The convenient nature of smartphones means they are the ideal device for online shopping, and consumers now expect to be able to buy products anywhere, anytime with the click of a button.

Question: In the past month, which of the following things have you done on the internet via any device? (Posted a review of a product, company or service) **Source:** GlobalWebIndex 2017-2019 (averages of all waves between Q2 2017-Q1 2019) **Base:** 736,713 internet users aged 16-64

Products Discussed Online

TOP 5 TOPICS DISCUSSED ONLINE

% who have discussed the following topics/products online last month

16–24		25–34		35–44		45–54		55–64	
Music	22%	Films	21%	Films	16%	Films	12%	Politics	10%
Films	22%	Mobile phones	17%	Mobile phones	15%	Food/restaurants	11%	Travel/vacations	10%
Mobile phones	17%	Music	17%	Food/restaurants	13%	Travel/vacations	11%	Food/restaurants	9%
Books	15%	Food/restaurants	16%	Music	13%	Politics	10%	Films	7%
Technology	15%	Fashion/clothing	15%	Fashion/clothing	13%	Music	10%	Sports	7%

Globally, **films and music are the most widely discussed topics online**, but this varies by generation. While 22% of 16-24-year-olds talk about popular culture online, only 7% of 55-64s discuss films and music. 45-64s are generally less likely to post opinions on products online, but when they do, they typically discuss politics, travel and food-related topics.

Questions: In the last month, which of these have you posted an opinion about online? **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

Market Insights

Questions: In the past month, which of the following things have you done on the internet via any device? // 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 Q1 2019 **Base:** 114,973 Internet Users aged 16-64

02

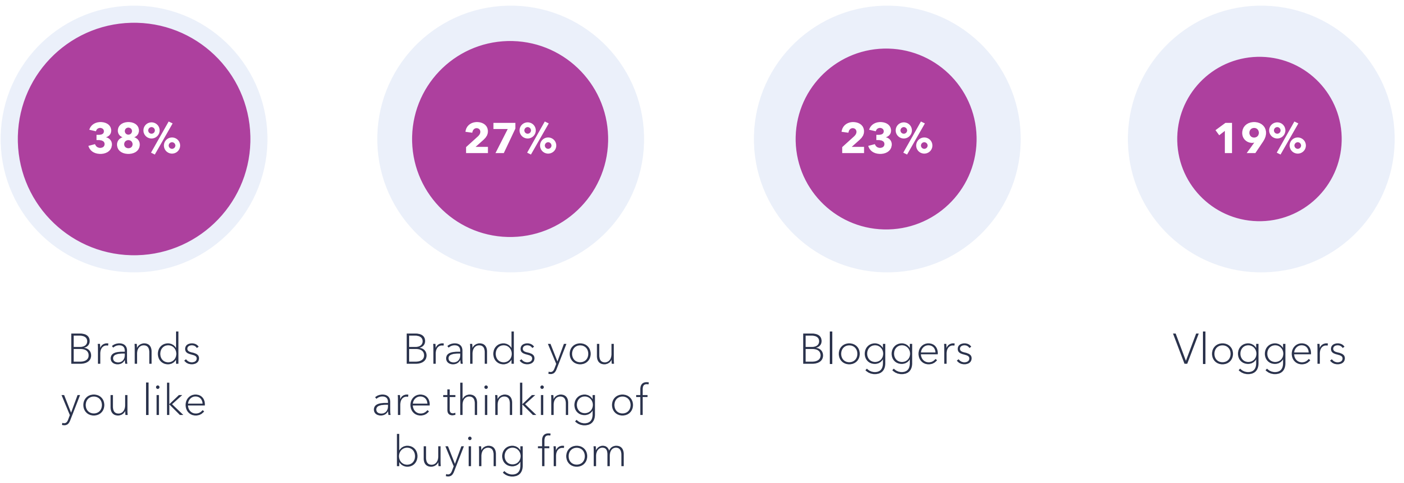
Brand Advocacy

Brand Advocacy on Social Media

Brand Advocacy on Social Media

ACCOUNTS FOLLOWED ON SOCIAL MEDIA

% who say they "follow" these types of accounts on social media



14% of users discover brands via celebrity endorsements, jumping to 19% among 16-24s.

Internet users now spend an average of 2h 26m on social media each day, which is around 36% of the time they devote to digital media. Moreover, only 2% say they don't visit social networks on a monthly basis. Social networks being accessed anywhere, anytime – thanks to universal smartphone ownership – has led to the proliferation of branded content on social media. As such they have provided one of the most effective and cost-efficient ways for brands to raise awareness.

With such an expansive reach, the potential for social media to facilitate online brand advocacy is clear, so it doesn't come as a surprise that many brands have sought to establish a solid presence across social platforms.

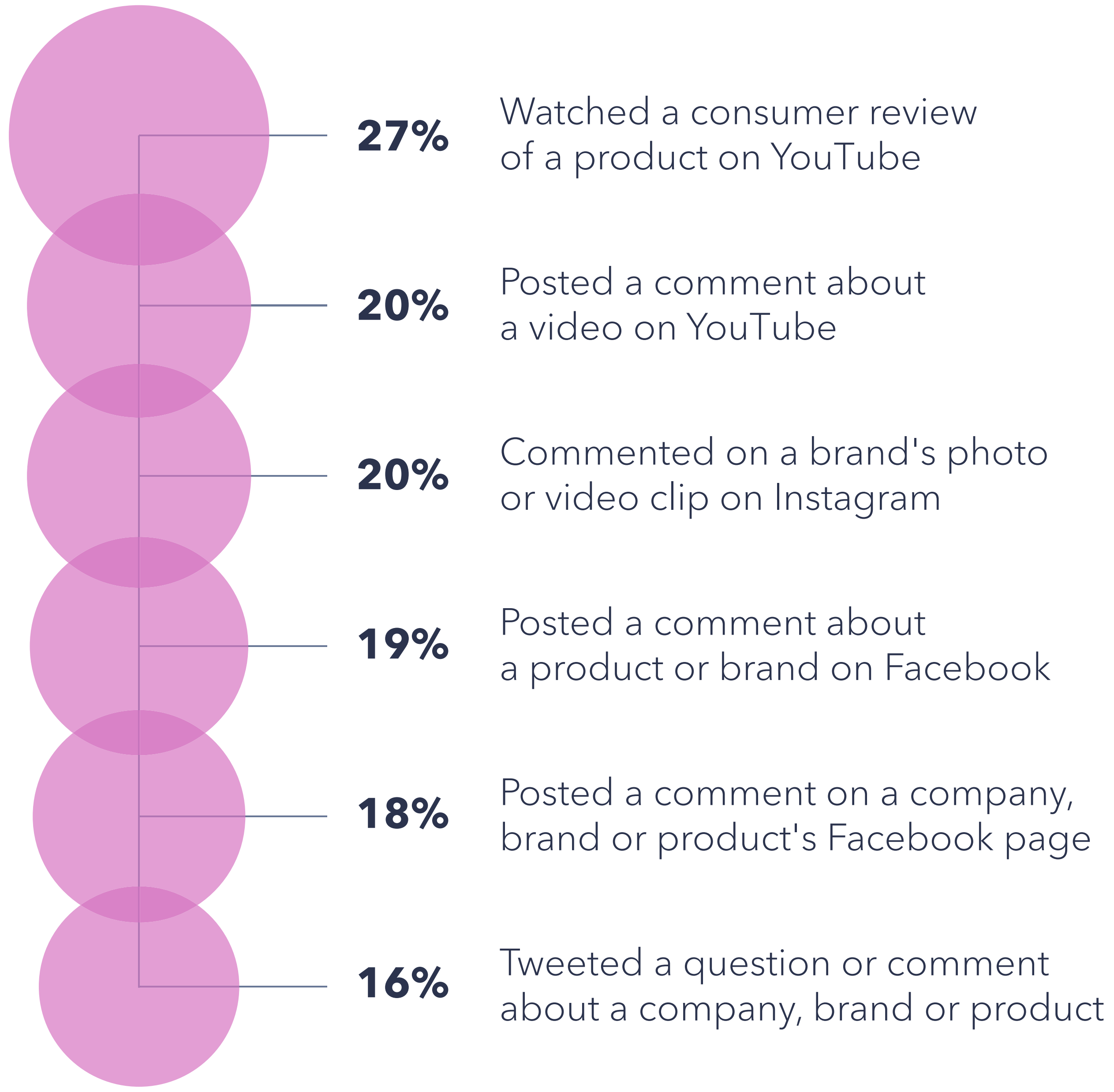
A significant portion of "followers" are actively engaging with these brands on social media; for example, a fifth of Instagrammers have posted a comment on a brand's photo or video in the past month. To give this some context, **23% of internet users say that seeing that lots of other people have endorsed a brand or product on social media would motivate them to complete a purchase**, underlining how transparent and efficient the brand advocacy process has now become with the help of social media.

But it may not only be from official brand social media accounts that brand advocacy may be taking place. **Social media influencers are another force to be leveraged to spread a brand's message** – 23% are following bloggers on social media and 19% follow vloggers (rising to 29% among 16-24s). These influencers with robust followings can give a brand access to existing communities and key demographics across a variety of platforms.

In a bespoke survey we ran in August, we found that **around 7 in 10 online consumers in the U.S., and around 6 in 10 in the UK, follow influencers**. Instagram takes the top spot for influencer engagement among younger demographics, while Facebook is preferred by older cohorts.

PLATFORM-SPECIFIC BEHAVIORS

% of users of each service who have done the following in the last month



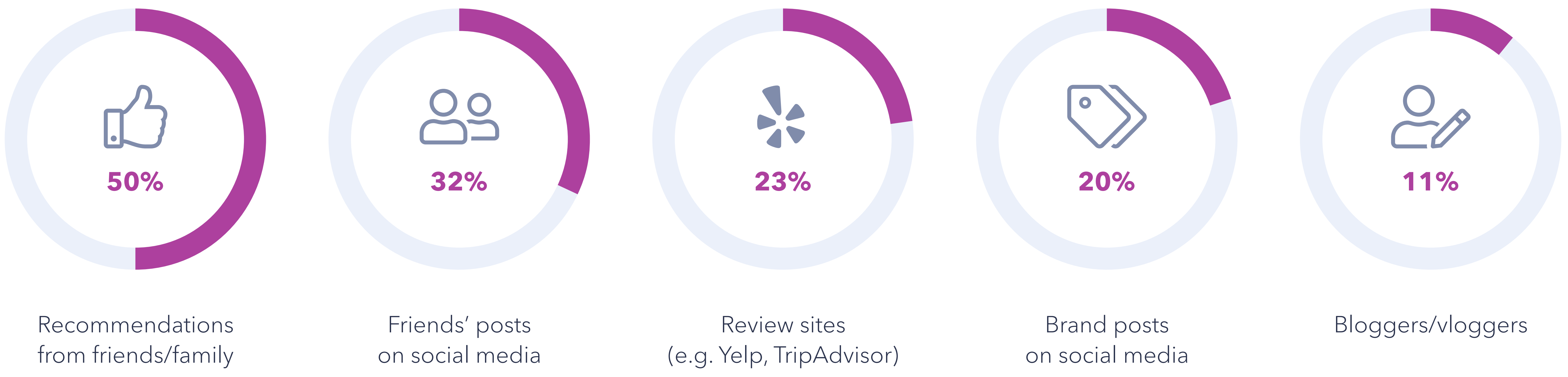
27% of internet users say they follow brands they like on social media, and a further 38% are following brands they are thinking of buying something from.

Questions: What are your main reasons for using social media? // Which of these have you done in the last month on Facebook/ YouTube/Twitter/Instagram? **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

Food on Social Media

SOURCES OF FOOD INSPIRATION

% of internet users in the UK and the U.S. who find inspiration for restaurants they visit from the following



FOOD-RELATED BRAND ADVOCACY

% of internet users in the UK and the U.S. who have done the following on social media in the last month

Posted a photo from a meal you ate at a restaurant	21%
Posted a review about food you ate at a restaurant	17%
Written about a meal you ate at a restaurant	11%

17% of internet users in the UK and the U.S. have "checked in" or "tagged" the restaurant they were eating in on social media.

Food is one of the most popular topics discussed on social media today. In fact, **16% of Instagrammers globally have posted their opinion about food or restaurants online in the last month**, rising to 20% among those with an interest in healthy eating. And with almost a third of internet users finding inspiration for restaurants they visit from friends' posts on social media, it's clear that **food-related user-generated-content on social media presents important opportunities to grow brand awareness and promote their offerings**.

Meal photos from restaurants and reviews are posted regularly by online consumers in the UK and the U.S., with 21% and 17% respectively doing so on a monthly basis. But what do food and drinks brands need to win these consumers over as advocates?

Questions: Which of the following have you done on social media in the last month? // From where do you tend to find inspiration for restaurants you visit? A "restaurant" here includes things like cafes, fast food chains – anywhere you eat outside of a house. // If you were to do it, what would make you share a post online about a meal you're eating/have eaten at a restaurant? **Source:** GlobalWebIndex July 2019 **Base:** 2,510 (UK) and 2,198 (U.S.) Internet Users aged 16-64

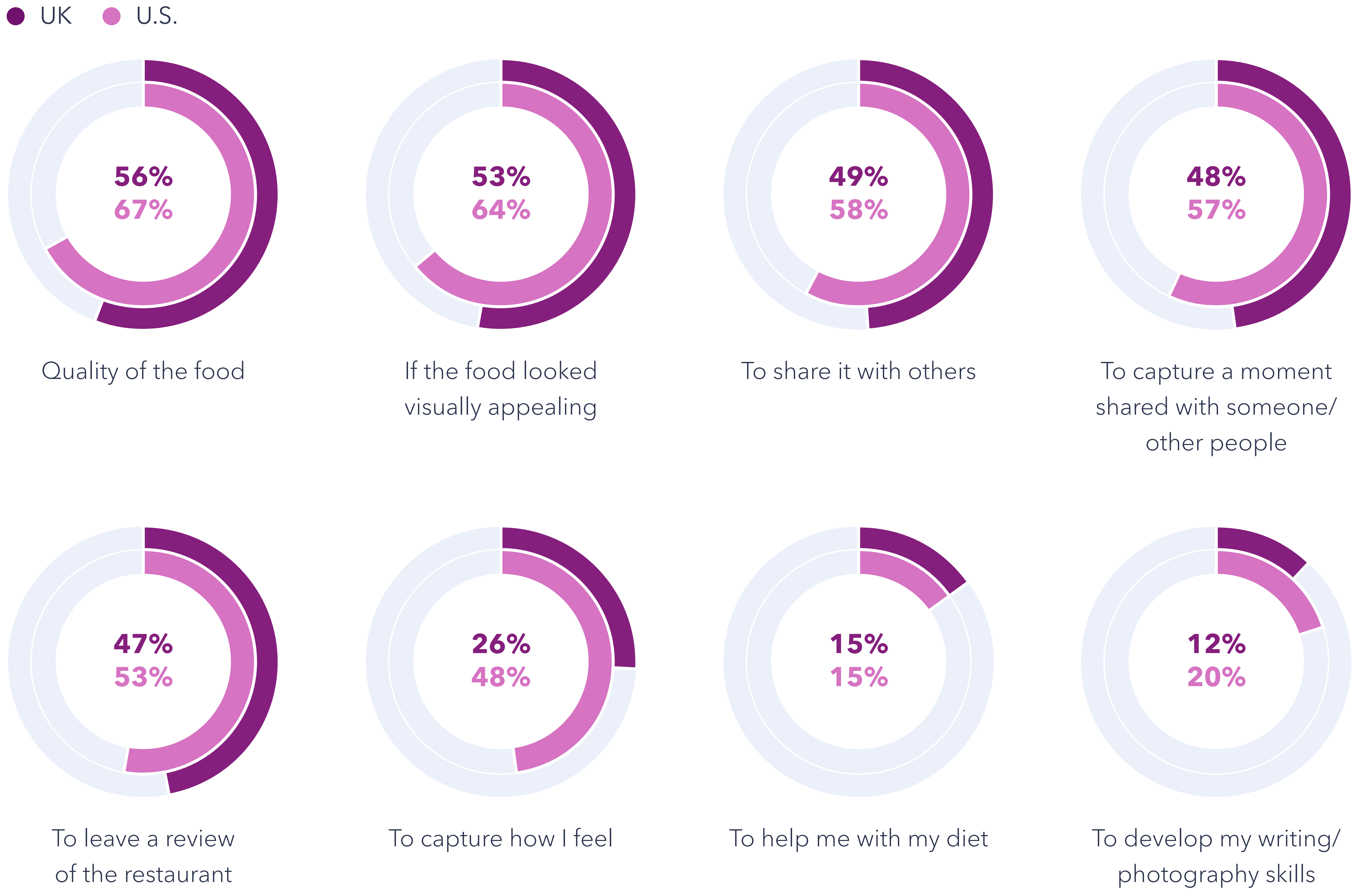
Food on Social Media

Our research shows that the single most popular incentive for restaurant advocates is **the quality of the food they receive**, and this is especially prevalent in the U.S. (67%). **The appearance of the food is also important**, with 63% of restaurant advocates in the UK and the U.S. saying that a visually appealing meal will make them post online about it. **The U.S. have a much higher tendency to want to capture their feelings by uploading a post on social media** (48% compared to 26% in the UK).

As social media sharing has moved from personal statuses to elaborate videos and photos showcasing lifestyles and building personal brands, **experiences have emerged as an important way of communicating this**; whether that's through travel, exuberant services or food. So food and drink brands aiming to spread the word on social media should offer not only quality and "Instagrammable" food, but an *experience* to their customers.

RESTAURANT ADVOCACY MOTIVATIONS

% of restaurant advocates who say the following would make them share a post online about a meal they're eating



Question: If you were to do it, what would make you share a post online about a meal you're eating/ have eaten at a restaurant? **Source:** GlobalWebIndex July 2019 **Base:** 620 (UK) and 751 (U.S.A.) Restaurant Advocates aged 16-64

• TREND IN ACTION •

Mexican Grill Chipotle capitalizes on TikTok challenges

Chipotle was reportedly the first restaurant brand to partner with TikTok in the U.S., which resulted in the chain's highest digital sales day, now **representing** around 18% of total sales. Its latest campaign dubbed "The #GuacDance challenge" is the brand's second challenge on TikTok showing enormous success after the #ChipotleLidFlip earlier this year. The campaign was issued to celebrate National Avocado Day on 31st July by urging guacamole fans to show off dance moves dedicated to avocados.

During its first six-day run on TikTok the campaign **received** over 250,000 video submissions using the designated hashtag. This led to Chipotle's biggest guac day in history, serving more than 800,000 sides of guac. As CMO Chris Brandt puts it: *"When you can do something that engages your customers in a way they think is cool, interesting and new, and culturally relevant, people will flock to your brand"*.

03

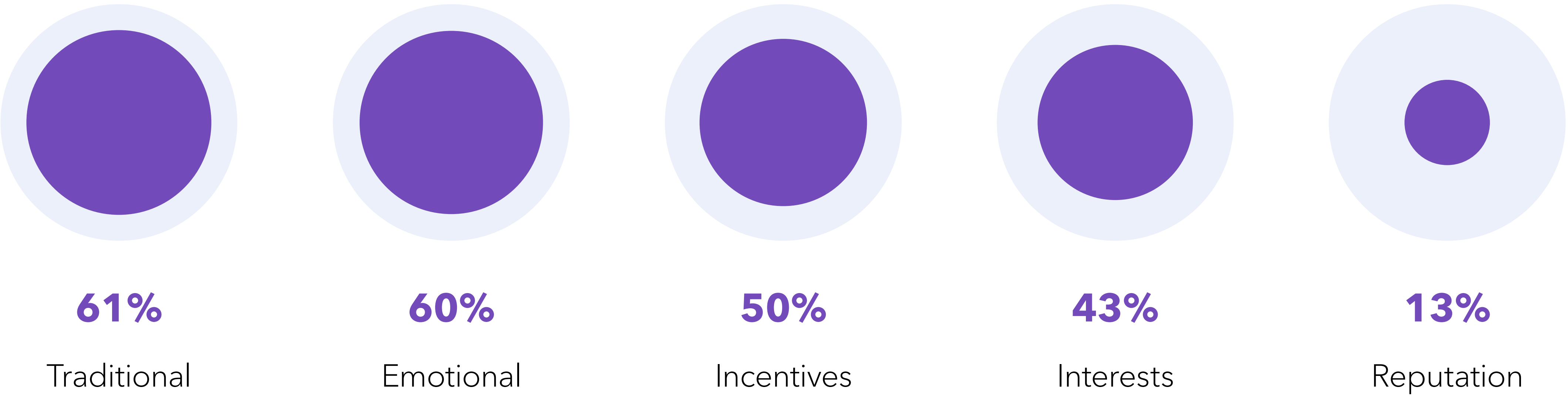
Brand Advocacy

Key Advocacy Factors

Brand Advocacy Motivations

BRAND ADVOCACY SEGMENTS*

% who fall under the following segments



***SEGMENT DEFINITIONS:**

Traditional High-quality products, When I've received great customer service

Emotional Love for the brand, The feeling of taking part/being involved, Having insider knowledge about the brand or its products, When I have a personal/one-on-one relationship with a brand

Incentives Rewards *(e.g. discounts, free gifts, etc)*, Access to exclusive content or services *(e.g. music, videos, etc)*

Interests When something is relevant to my own interests, When something is relevant to my friends' interests

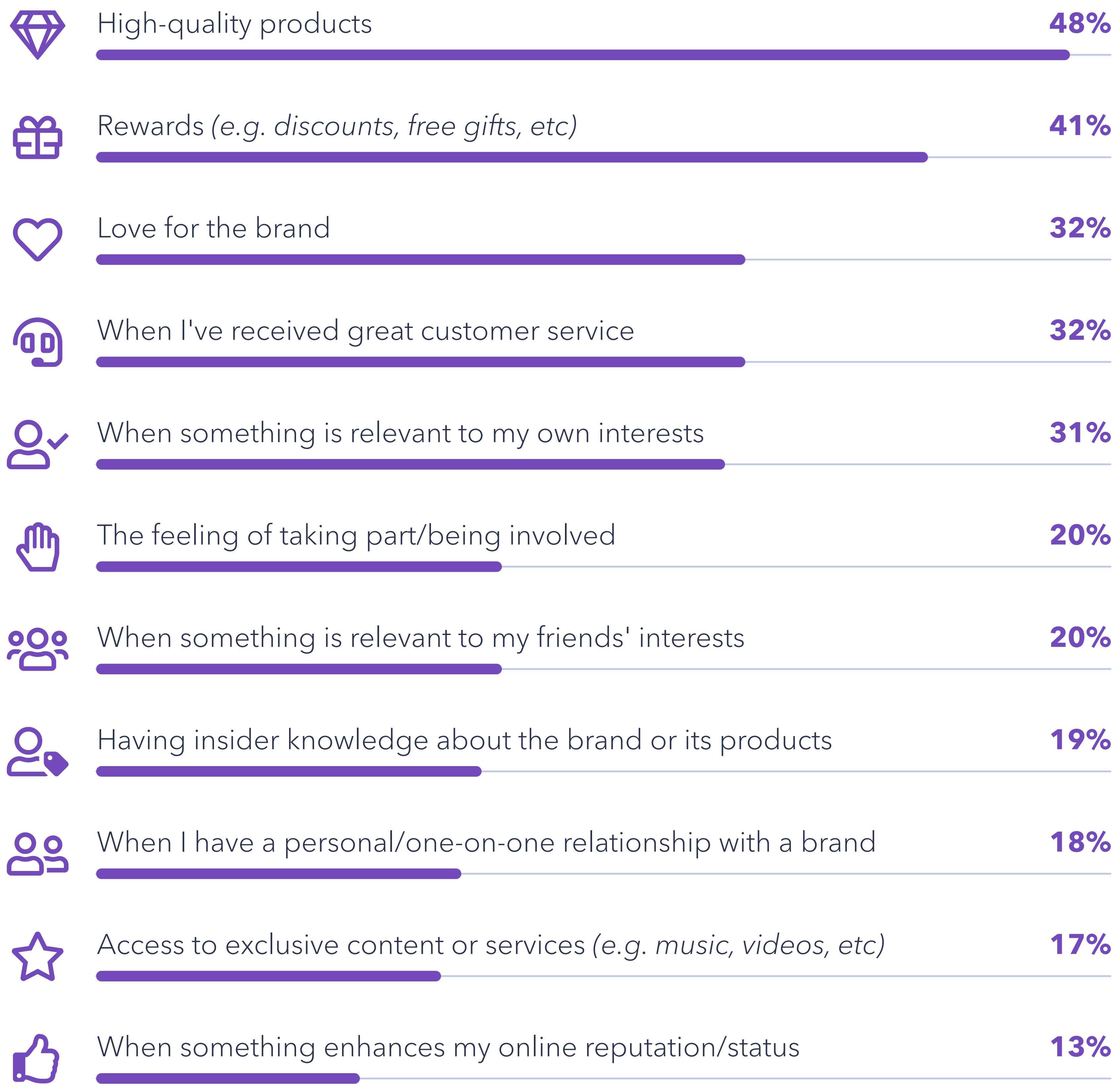
Reputation When something enhances my online reputation/status

6 in 10 online adults globally regularly inform friends and family on new products and services.

More traditional brand advocacy incentives still make the most impact across all of the main demographic and regional splits. Globally, **48% of internet users say that high-quality products would motivate them to promote a brand online**, making this the most important incentive among the 11 brand advocacy motivations we track. Promoting a brand in exchange for great customer service also makes it into the top five in our chart, with almost a third citing this as a primary motivation.

BRAND ADVOCACY MOTIVATIONS

% who would be motivated by the following to promote a brand online



Question: What would most motivate you to promote your favorite brand online? **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

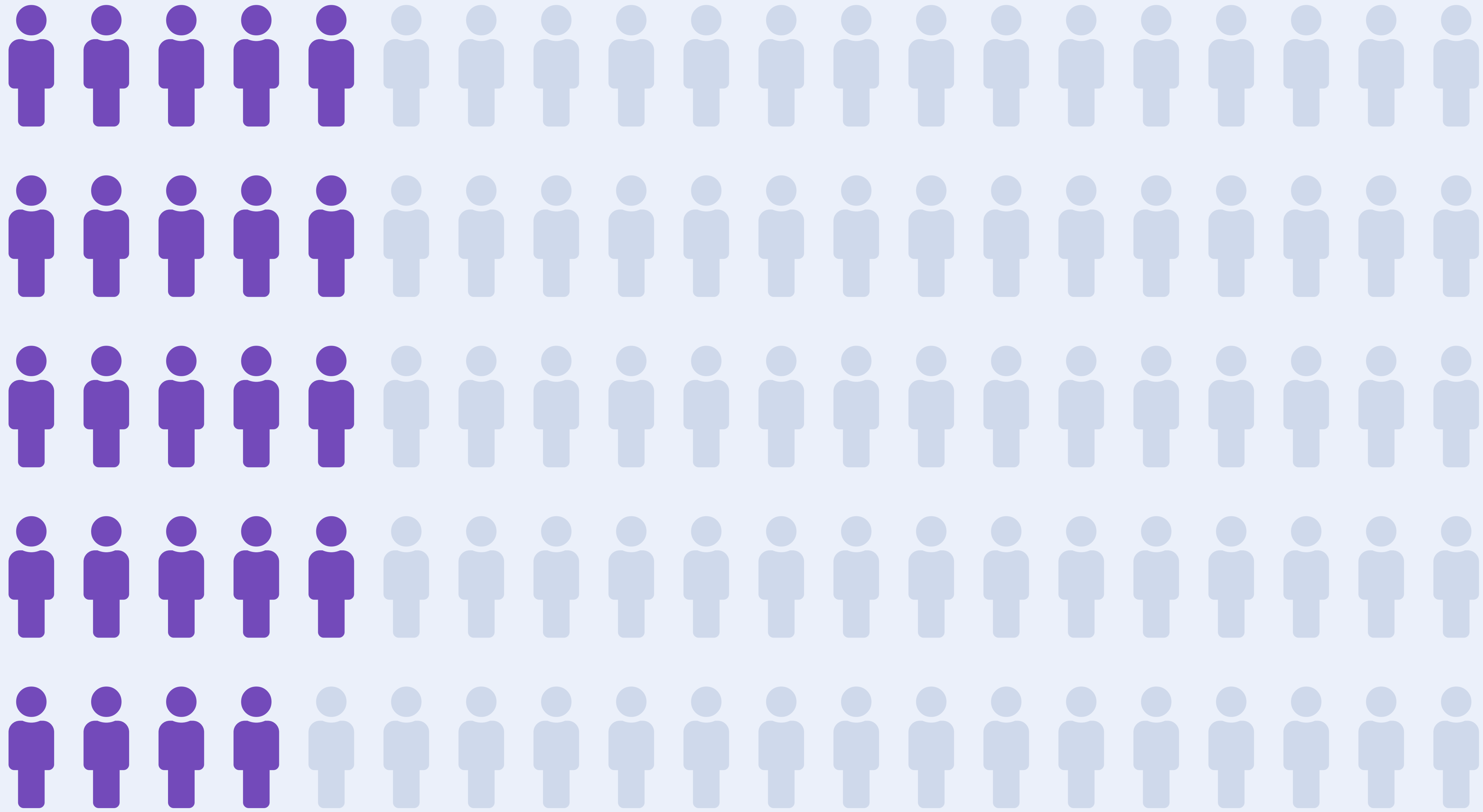
Brand Advocacy Motivations

The impact of more traditional motivations is even more pronounced when we group these motivations into segments. But it's also overwhelmingly clear that **building positive emotional relationships underpins brand advocacy, with 6 in 10 internet users falling within this segment**. Through cultivating these personal relationships with consumers, brands can leverage their existing communities to endorse their products.

Digital consumers overall are more likely to value brand-consumer connections than direct incentives provided by the brand – just half would promote a brand in exchange for either access to exclusive content or financial rewards. Meanwhile, it may be significantly behind our other segments, but it's still 13% who would endorse a brand to enhance their online reputation or status, something which relies heavily on a brand establishing a strong online presence. **It's important to remember here that online reputations form the basis of trust in many online review aggregators, not to mention many business models in the sharing economy.**

Elsewhere, 46% of digital consumers say that their favorite brand plays a crucial role in their online life and experience, showing that **what a brand represents can be an important influence in a consumer's online persona**. As a result, **a consistent and meaningful brand message must be part of any marketing strategy in order to build these connections and establish this reputation**.

Understanding the target audience is also crucial – **43% of consumers would endorse a brand if something is relevant to their own or their friends' interests**. In the next section we look at what those interests are.

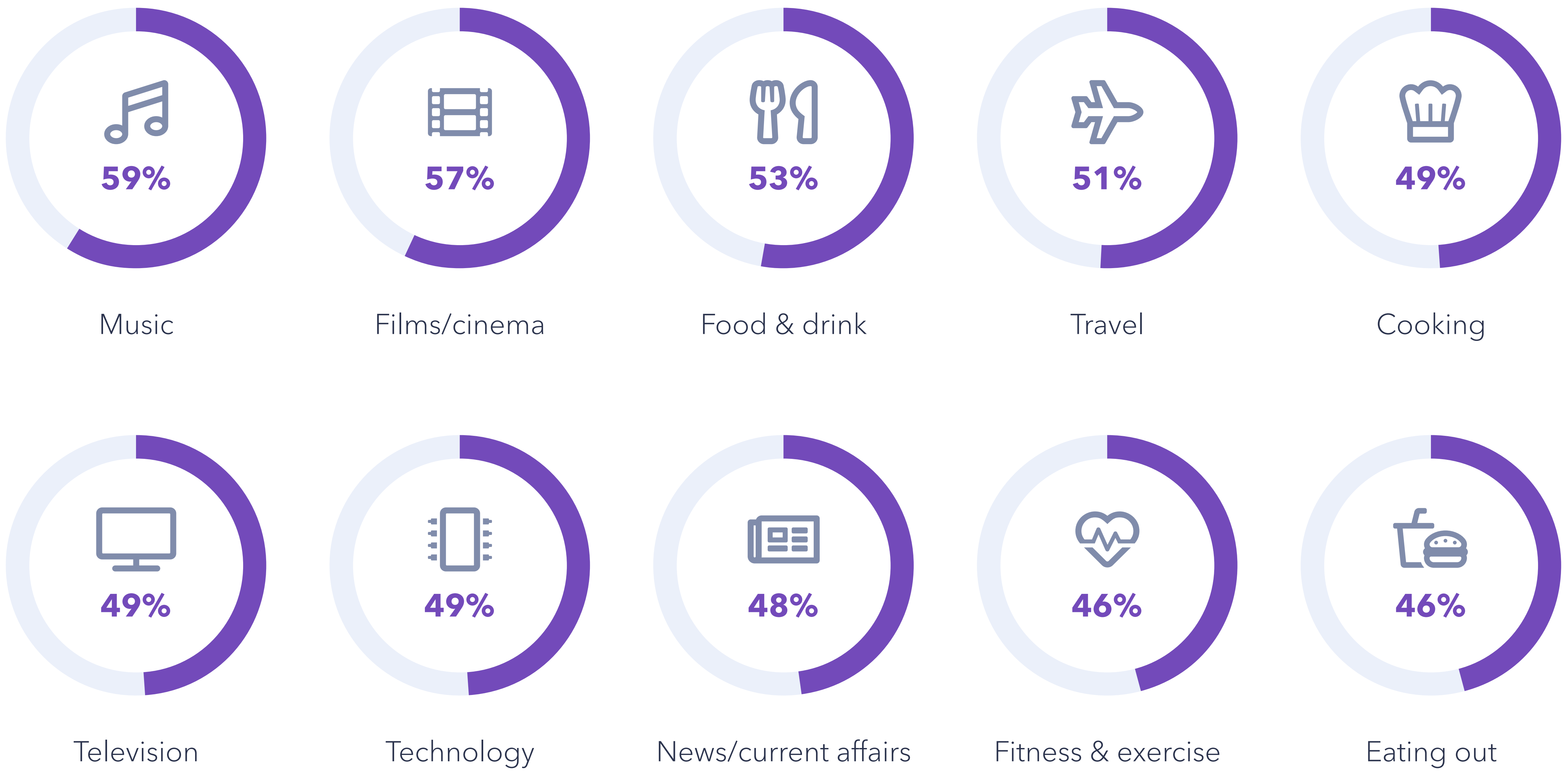


A quarter of online consumers want their favorite brands to make them feel like valued customers – the second-most commonly cited thing a brand can provide.

Interests

TOP 10 INTERESTS OF INTERNET USERS

% of internet users who say they're interested in the following



In line with the topics internet users tend to discuss online, films and music comprise their top interests as well – areas where offering access to exclusive content could go a long way with entertainment-hungry advocates. Food, restaurants and travel are also prolific examples of brand advocacy topics, with established online communities and review aggregators offering consumer advice.

TOP 3 OVER-INDEXES

16–24

- Gaming
- Adventure/extreme sports
- Urban/modern art

25–34

- Entrepreneurship
- Reality TV
- Gambling

35–44

- Gambling
- News/current affairs
- Cars/motoring

45–54

- News/current affairs
- Gardening
- Television

55–64

- Gardening
- News/current affairs
- Local issues

Question: Which of these things are you interested in? **Source:** GlobalWebIndex Q1 2019 **Base:** 139,397 Internet Users aged 16-64

04

Brand Advocacy

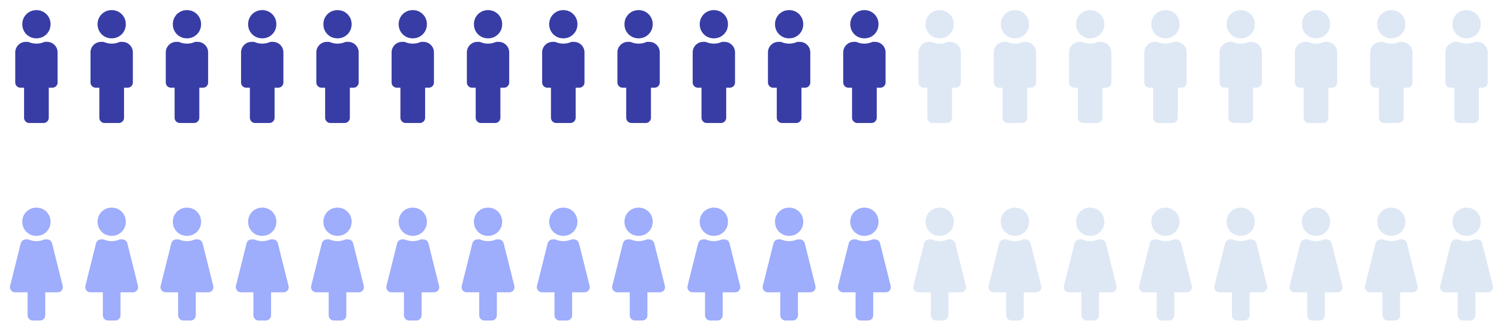
The Demographics of Brand Advocacy

Men vs. Women

% who regularly inform friends and family on new products/services

59%

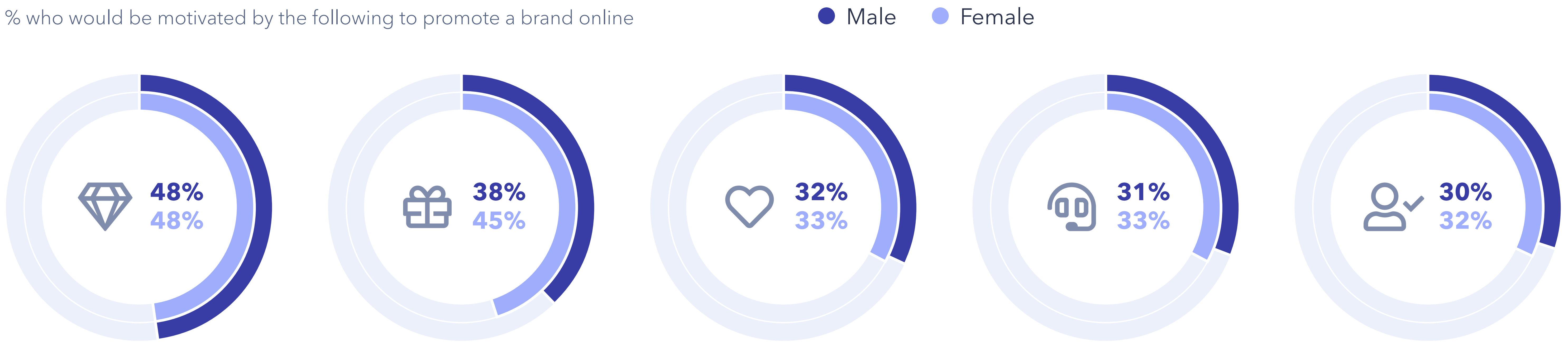
61%



Broadly speaking, **we see a similar picture between men and women when it comes to brand advocacy**. High-quality products remain the most important motivation at 48%, but **women tend to value financial rewards more than their male counterparts**, and this is what differentiates them the most. Men, on the other hand, are more likely to advocate a brand when **something enhances their online reputation or in exchange for exclusive content or services**.

TOP 5 BRAND ADVOCACY MOTIVATIONS

% who would be motivated by the following to promote a brand online



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

TOP 2 OVER-INDEXES

Male

- When something enhances my online reputation/status
- Access to exclusive content (e.g. music, videos, etc)

Female

- Rewards (e.g. discounts, free gifts, etc)
- When something is relevant to my own interests

Questions: To what extent do you either agree or strongly agree with the statements below? // What would most motivate you to promote your favorite brand online? **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

Generational Differences

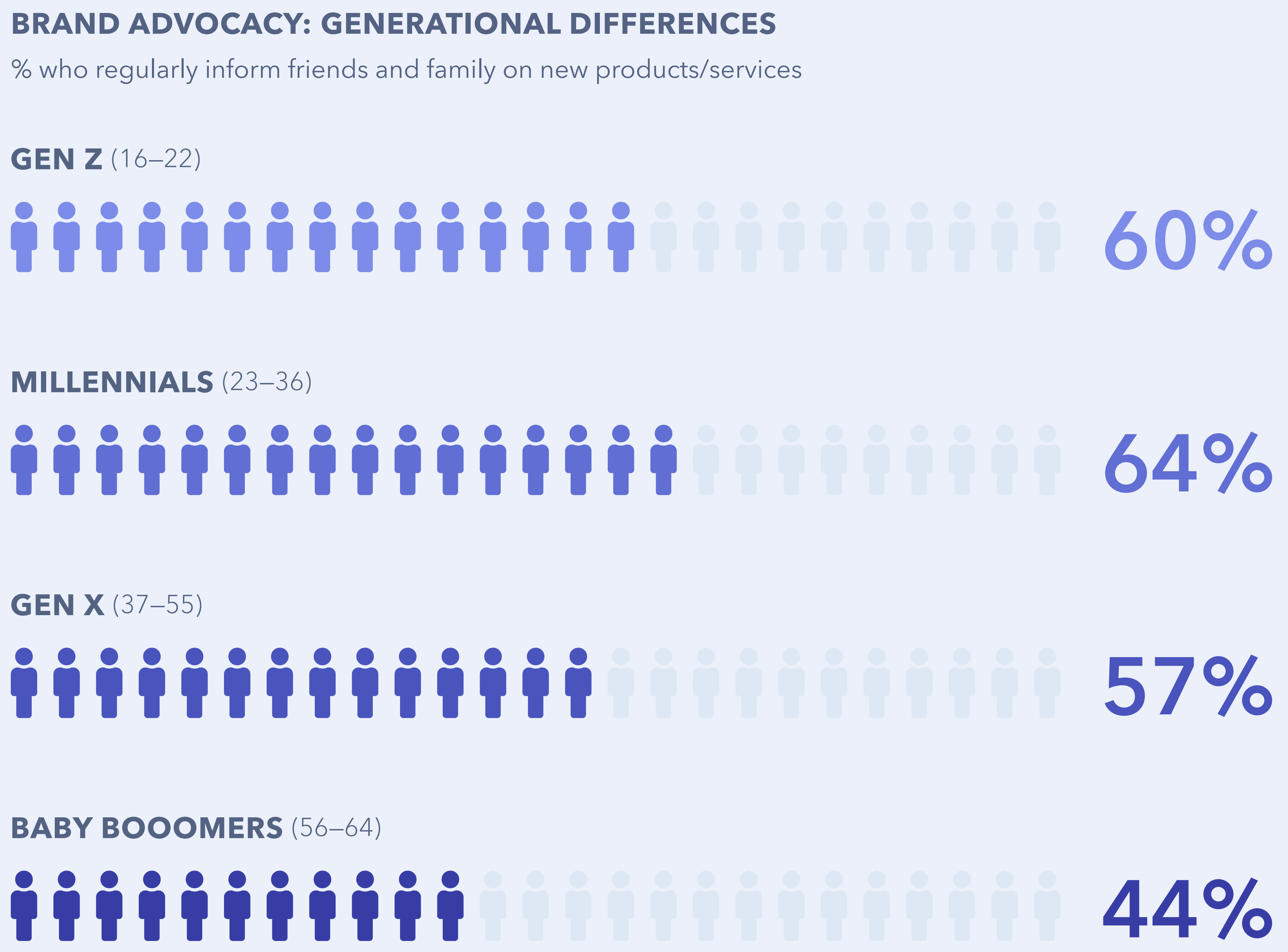
Across all of the generations, millennials **are the most likely to promote products and services to friends and family**. We see a particular drop here among baby boomers, however, who are most likely to discover brands via word-of-mouth recommendations (37% do so compared to 29% of Gen Z).

Generally speaking, there is a broad divide across the generations as to why they are most likely to want to promote a brand online. For younger groups, a brand's status plays a much more central role in their advocacy motivations, and **endorsing a product or service out of simple love for a brand resonates most strongly among** Gen Z, decreasing in popularity among older generations. Gen Zs more broadly don't really put a lot of weight on brand labels; they care more about the opinions of their peers and are, on the whole, more easily swayed compared to other generations (42% say that they're easily swayed by other people's opinion). But this is very much a two-way deal: **6 in 10 regularly inform friends and family about new products**, and 47% have posted a review of a product, company or service in the past month.

Similarly, **millennials are much more likely to promote a brand if it enhances their online reputation**. What's particularly notable here is that **there are increasing returns to be made from winning over these millennial brand advocates who are highly concerned with their online reputation**. These consumers are more likely than average to buy a product after seeing that lots of other people have "liked" or endorsed a brand on social media (25% say this).

Something that ties both of these younger generations together is **their love for exclusivity and entertainment**. Important to note here is how offering exclusive content is an effective way of keeping these potential brand ambassadors engaged. Maintaining an exchange of services beyond the original purchase can make a real impact with these younger consumers.

On the contrary, older groups are much more receptive to direct incentives. **Great customer service ranks higher among Gen X and baby boomers**, whereas more emotional and personal motivations – factors like love for a brand, involvement, or exclusivity – will likely enlist much fewer of them as brand advocates. Generally, they are **less on board with consumerist values**, are more economical, and less eager to choose brands and products based on prestige factors.



Millennials are most likely to be brand advocates, while few baby boomers express emotional connection with brands.

Generational Differences

TOP 5 BRAND ADVOCACY MOTIVATIONS | % who would be motivated by the following to promote a brand online

GEN Z

High-quality products	50%
Rewards (e.g. discounts, free gifts, etc)	42%
Love for the brand	38%
When something is relevant to my own interests	33%
When I've received great customer service	29%

MILLENNIALS

High-quality products	47%
Rewards (e.g. discounts, free gifts, etc)	40%
Love for the brand	34%
When I've received great customer service	31%
When something is relevant to my own interests	31%

GEN X

High-quality products	48%
Rewards (e.g. discounts, free gifts, etc)	42%
When I've received great customer service	33%
When something is relevant to my own interests	30%
Love for the brand	29%

BABY BOOMERS

High-quality products	47%
Rewards (e.g. discounts, free gifts, etc)	44%
When I've received great customer service	36%
When something is relevant to my own interests	30%
Love for the brand	23%

TOP 2 OVER-INDEXES (Gen Z)

- Access to exclusive content (e.g. music, videos, etc)
- Love for the brand

TOP 2 OVER-INDEXES (Millennials)

- When something enhances my online reputation/status
- Access to exclusive content (e.g. music, videos, etc)

TOP 2 OVER-INDEXES (Gen X)

- When I've received great customer service
- Rewards (e.g. discounts, free gifts, etc)

TOP 2 OVER-INDEXES (Baby Boomers)

- When I've received great customer service
- Rewards (e.g. discounts, free gifts, etc)

Question: What would most motivate you to promote your favorite brand online? **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

Fast-Growth vs Mature Markets

BRAND ADVOCACY: FAST-GROWTH* VS MATURE MARKETS**

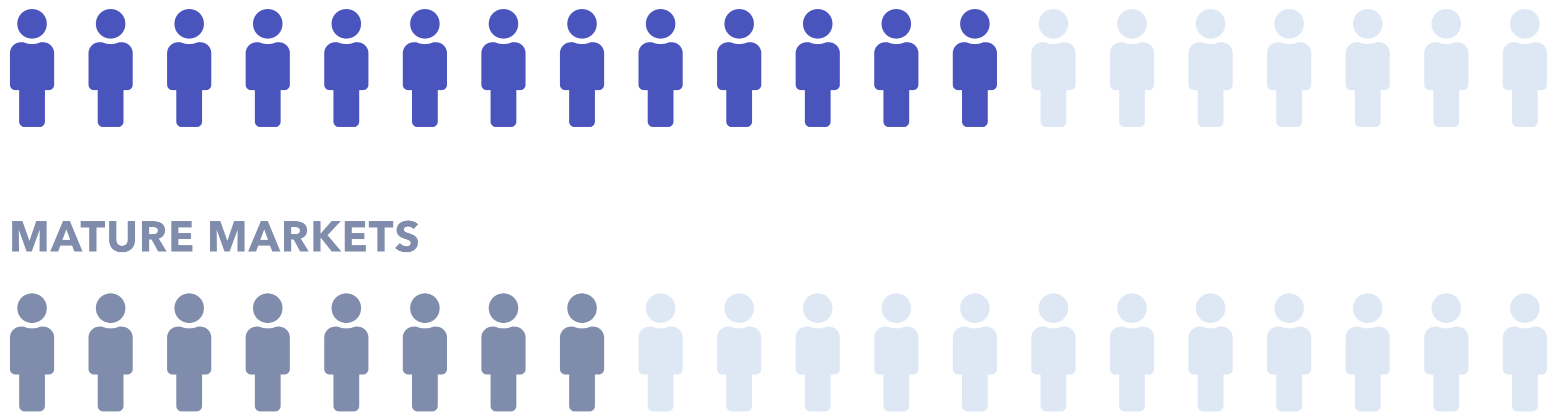
% who regularly inform friends and family on new products/services

FAST-GROWTH MARKETS

67%

MATURE MARKETS

41%



Internet users in fast-growth markets are much more likely to be engaging in brand advocacy than those in mature markets; **2 in 3 in the former regularly inform their peers about products or services, compared to around 4 in 10 in mature markets**. This is clearly represented in our data, with fast-growth markets typically posting much higher figures for nearly all of our advocacy motivations. Due to their online populations skewing toward younger, urban and more affluent individuals, **internet users in developing countries tend to attach strong premiums to status brands, and hence tend to be much more inclined to promote a brand out of simple love for it**. However, receiving quality products is the most prevalent brand advocacy motivation here – this is especially influential in the Philippines (Index 1.29).

Mature markets – where higher internet penetration rates mean that older demographics are represented in online populations to a much greater extent – tend to place a much stronger value on practicality and customer care. In fact, **endorsing a brand in exchange for financial rewards and good customer service are the only areas where we see these figures climb above those of their fast-growth counterparts**.

TOP 5 BRAND ADVOCACY MOTIVATIONS

% who would be motivated by the following to promote a brand online

FAST-GROWTH MARKETS

High-quality products	50%
Rewards (e.g. discounts, free gifts, etc)	38%
Love for the brand	34%
When something is relevant to my own interests	32%
When I've received great customer service	32%

MATURE MARKETS

Rewards (e.g. discounts, free gifts, etc)	48%
High-quality products	42%
When I've received great customer service	32%
When something is relevant to my own interests	28%
Love for the brand	28%

TOP 2 OVER-INDEXES (Fast-growth markets)

- When something enhances my online reputation/status
- Access to exclusive content (e.g. music, videos, etc)

TOP 2 OVER-INDEXES (Mature markets)

- Rewards (e.g. discounts, free gifts, etc)
- When I've received great customer service

***Fast-growth markets:** Argentina, Brazil, China, Colombia, Egypt, Ghana, India, Indonesia, Kenya, Mexico, Morocco, Nigeria, Philippines, Romania, Russia, Saudi Arabia, South Africa, Taiwan, Thailand, Turkey, Vietnam

****Mature markets:** Australia, Austria, Belgium, Canada, Denmark, France, Germany, Hong Kong, Ireland, Italy, Japan, Malaysia, Netherlands, New Zealand, Poland, Portugal, Singapore, South Korea, Spain, Sweden, Switzerland, UAE, UK, U.S.A.

Questions: To what extent do you either agree or strongly agree with the statements below? // What would most motivate you to promote your favorite brand online? **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

Market Insights

HIGHEST-INDEXING BRAND ADVOCACY MOTIVATION

Argentina	Having insider knowledge about the brand or its products
Australia	When I've received great customer service
Austria	When I have a personal/one-on-one relationship with a brand
Belgium	When I've received great customer service
Brazil	Having insider knowledge about the brand or its products
Canada	Rewards *(e.g. discounts, free gifts, etc)*
China	When something enhances my online reputation/status
Colombia	Having insider knowledge about the brand or its products
Denmark	When I have a personal/one-on-one relationship with a brand
Egypt	When I've received great customer service
France	Rewards *(e.g. discounts, free gifts, etc)*
Germany	When I have a personal/one-on-one relationship with a brand
Hong Kong	When something is relevant to my friends' interests
India	When something enhances my online reputation/status
Indonesia	Having insider knowledge about the brand or its products
Ireland	When I've received great customer service
Italy	Rewards *(e.g. discounts, free gifts, etc)*
Japan	When something is relevant to my own interests
Malaysia	Having insider knowledge about the brand or its products
Mexico	Having insider knowledge about the brand or its products
Netherlands	When something is relevant to my own interests
New Zealand	When I've received great customer service
Philippines	High-quality products
Poland	When something is relevant to my own interests
Portugal	When something is relevant to my friends' interests
Romania	Having insider knowledge about the brand or its products
Russia	Rewards *(e.g. discounts, free gifts, etc)*
Saudi Arabia	When something enhances my online reputation/status
Singapore	Rewards *(e.g. discounts, free gifts, etc)*
South Africa	When I've received great customer service
South Korea	When I've received great customer service
Spain	Rewards *(e.g. discounts, free gifts, etc)*
Sweden	When something is relevant to my friends' interests
Switzerland	When I have a personal/one-on-one relationship with a brand
Taiwan	When something is relevant to my own interests
Thailand	Having insider knowledge about the brand or its products
Turkey	When I have a personal/one-on-one relationship with a brand
UAE	When something enhances my online reputation/status
UK	When I've received great customer service
U.S.A.	Rewards *(e.g. discounts, free gifts, etc)*
Vietnam	Having insider knowledge about the brand or its products

Question: What would most motivate you to promote your favorite brand online? **Source:** GlobalWebIndex Q1 2019 **Base:** 114,973 Internet Users aged 16-64

05

Brand Advocacy

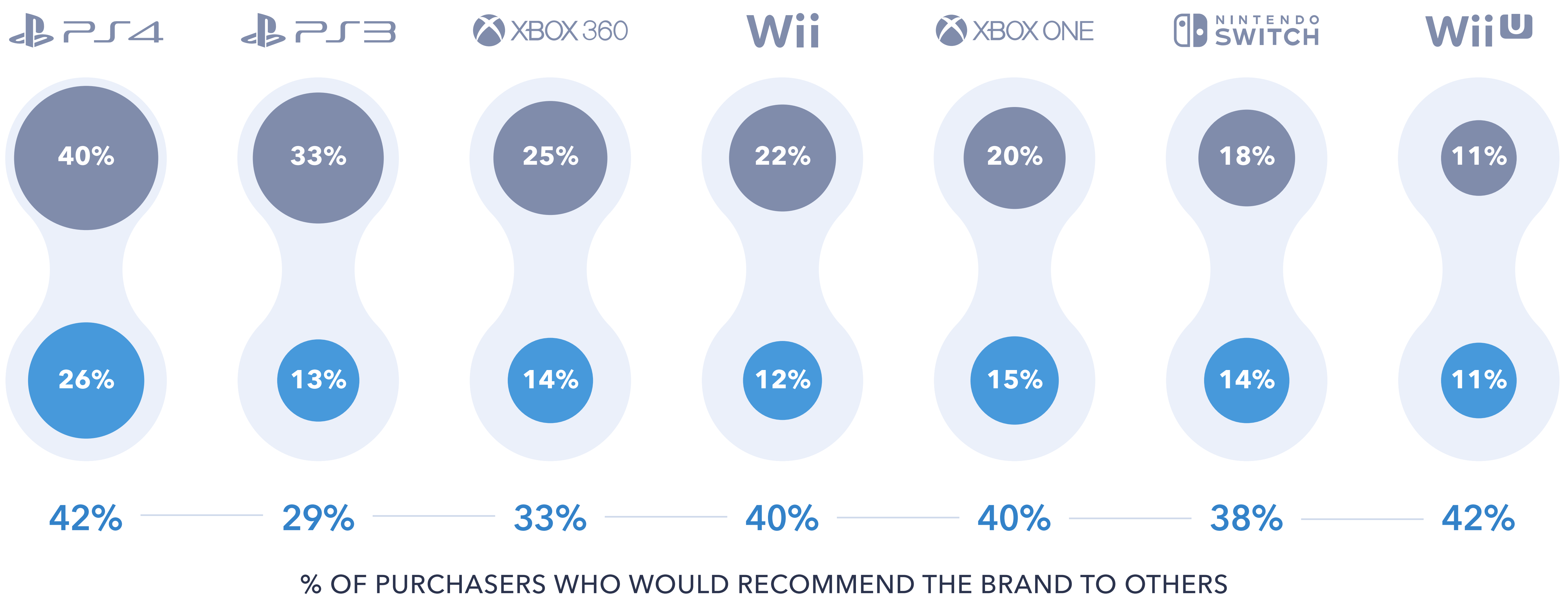
Brand Advocacy in Gaming & Luxury Fashion

The Gaming Industry

GAMING BRANDS: PURCHASE VS RECOMMEND

% of console gamers who say they use/would recommend the following consoles

User Recommender



In the gaming console market, the PlayStation 4 has established a healthy lead over other consoles on the market. **It remains the strongest console brand for both current usage and advocacy among console gamers.** However, the most striking trend here emerges when we look at the proportion of each console's owners who would recommend the brand to others.

PlayStation 4 again tops the charts, with 42% of those that have purchased the console saying they would recommend it. This is followed by the Nintendo flagship, which also commands a very loyal customer-base, with around 4 in 10 purchasers willing to advocate for the brand. The social nature of gaming is having an impact here – one person may buy the console, but it could be multiple individuals in a household who have access to the device. What's more, brand names in the games console market can have a big impact. Each flagship console launch constitutes a "generation" of gaming devices which can last almost a decade before being superseded by the next, with each of these consoles demanding a hefty price tag. For these reasons, **games consoles are naturally well-poised for brand advocacy**.

Console gamers are 34% more likely than average to advocate a brand if they have **access to exclusive content or services** (22% would). As a reflection of these gamers' young profile (61% of them being below the age of 35), enhancing their reputation and status is also likely to encourage them to endorse their favorite brands online (1.33 Index).

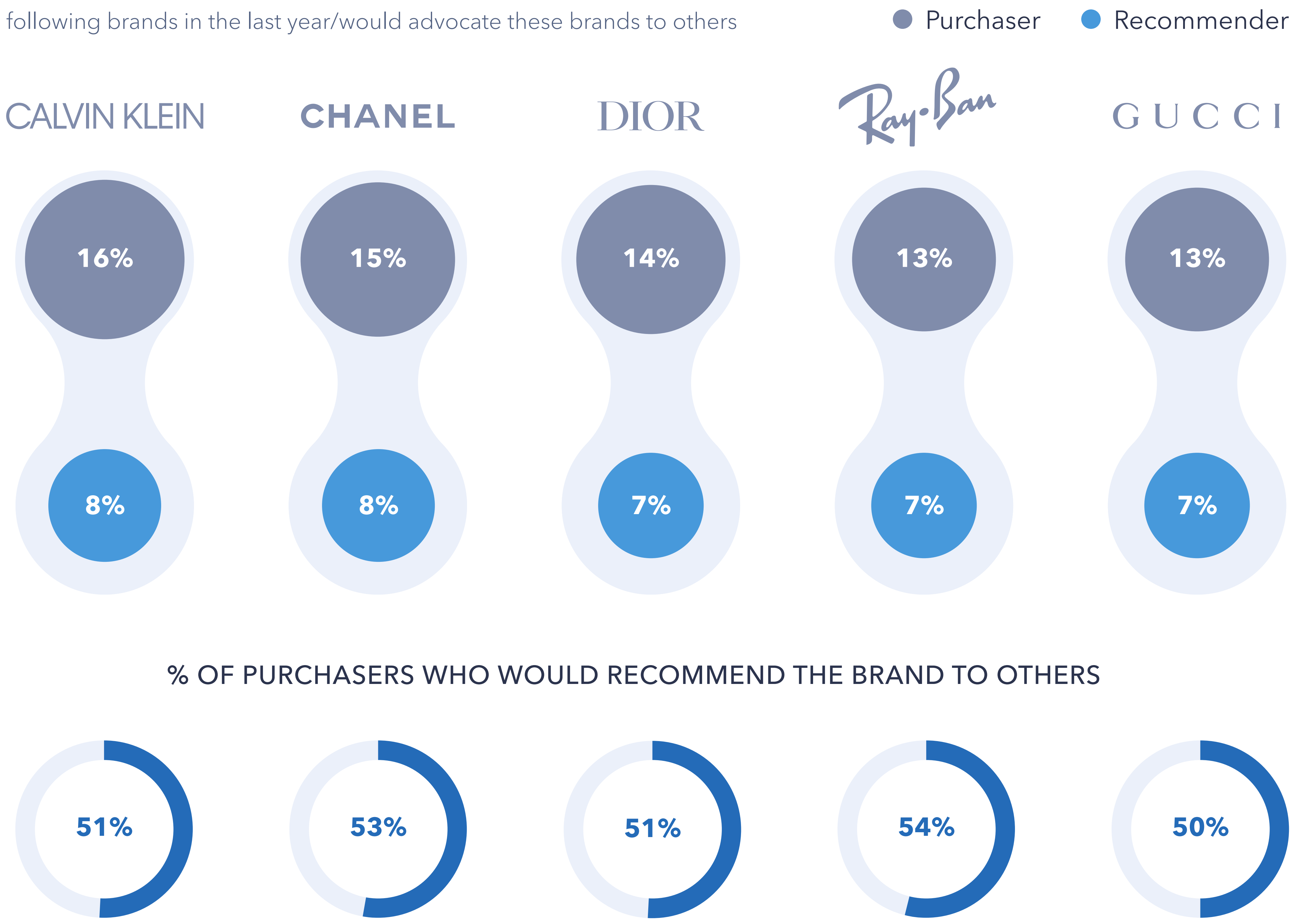
But console loyalty shouldn't be taken for granted. A bespoke survey we ran in the UK and U.S. in June this year showed that brand loyalty is not as important as other factors like quality of the graphics and the selection of games when it comes to console upgrades. In fact, **only 28% of console upgraders say brand loyalty would influence their decision to upgrade**, while 52% point the selection of games would. Although sticking to a brand is important, it proves more practical than emotional.

Question: Which of these devices do you use for gaming? Which would you recommend to others? **Source:** GlobalWebIndex Q1 2019 **Base:** 18,847 Console Gamers aged 16-64

The Luxury Fashion Industry

LUXURY FASHION BRANDS: PURCHASE VS RECOMMENDATION

% of luxury fashion buyers who have bought products from the following brands in the last year/would advocate these brands to others



Luxury fashion buyers are great brand ambassadors; **67% of them regularly inform friends and family on new products and services and 56% post product reviews each month**.

Global brands are more successful than smaller, local players at converting buyers into advocates. Which suggests these consumers might be more inclined to make "safe" suggestions, rather than recommending lesser-known, edgy brands. **Although Calvin Klein and Chanel command the most market share globally among this consumer segment, Ray-Ban is most successful in converting its customers to advocates.** 54% of luxury fashion buyers purchasing from the brand say they would advocate for it.

Understanding what these consumers expect from luxury brands is vital for those looking to encourage advocacy and elevate brand awareness.

Two-thirds of fashion and luxury buyers regularly inform friends and family on new products and services.

Questions: When did you last make a purchase from these luxury fashion brands? // Which of these brands would you advocate to others? **Source:** GlobalWebIndex Q1 2019 **Base:** 34,951 Luxury Fashion Buyers aged 16-64

The Luxury Fashion Industry

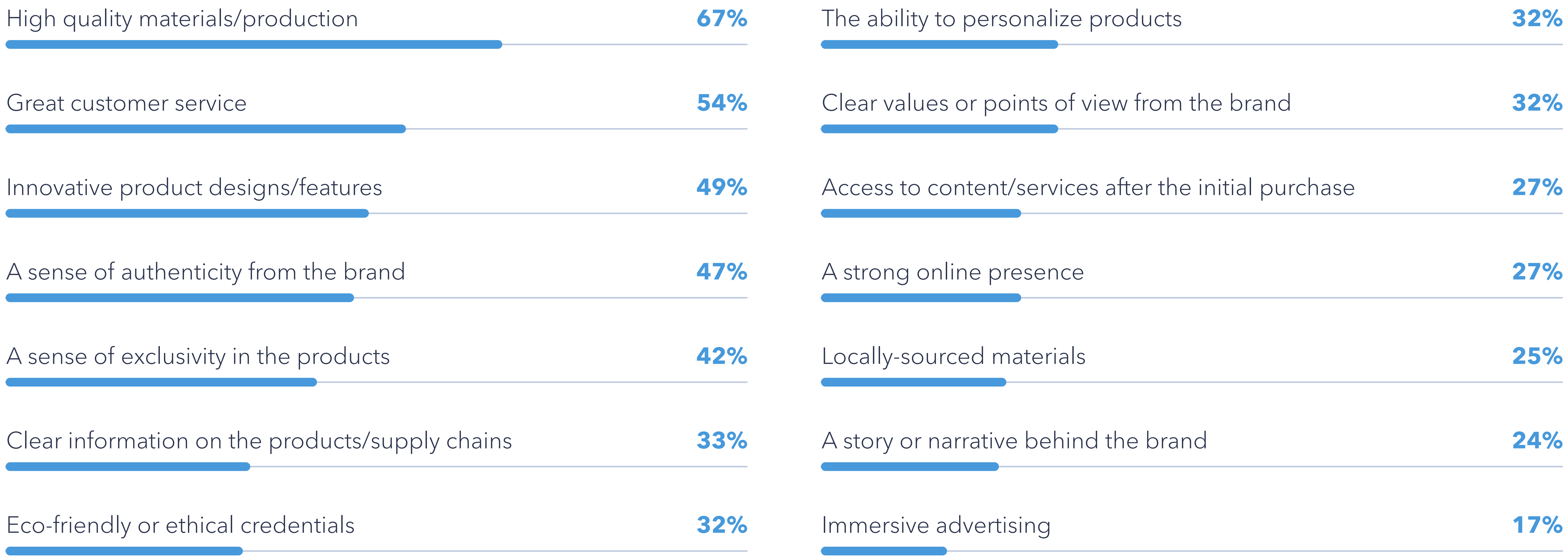
Similar to the global online population, **the expectations of luxury fashion buyers in the UK and the U.S. are centered around very traditional set of values**. Simply put, this audience wants to ensure that their money goes a long way, with high quality products and great customer service being the most prominent expectations they have from brands.

Generally, this is a **status-driven consumer segment who care about prestige and exclusivity,** and these traits factor into the expectations they have from luxury brands. 42% want to feel a sense of exclusivity in the products companies offer and an additional 27% demand access to services beyond the point of purchase. Brands keen to win this group over as advocates will have to cut through the noise by tapping into their image-conscious mindset and helping them enhance their online persona.

However, it's no longer only about image with these consumers – **having an eco-friendly or ethical credentials is requested by almost a third of this audience**. It's clear that addressing sustainability is no longer a nice-to-have, but a must-have, for any brand looking to safeguard its business and meet consumers' expectations.

WHAT DO BUYERS EXPECT FROM LUXURY BRANDS?

% of luxury fashion buyers in the UK and the U.S. who expect the following from luxury brands



63% of luxury fashion buyers globally would pay more for sustainable or eco-friendly products, and 32% of those in the UK and the U.S. expect luxury brands to have these credentials.

Question: What do you most expect from high-end or luxury brands? Please select all that apply. **Source:** GlobalWebIndex March 2019 **Base:** 665 (UK) and 703 (U.S.) Luxury Fashion Buyers aged 16-64

How is Calvin Klein building a community of advocates?

What sits at the heart of Calvin Klein advocates as a group is the expression of collective social conscience. This audience is 32% more likely than average to pay more for sustainable products and 94% more likely to post about environmental issues online. Moreover, 85% of them think we should all strive for equality. So, what is Calvin Klein doing right to make these ambassadors tick and raise the brand's profile online? It encourages self-expression.

First, the brand launched a Pride 2019 **collection** together with the Human Rights Campaign Foundation to support LGBT equality. Second, most of its campaigns incorporate narratives of self-expression and sexuality and feature native hashtag challenges for audience engagement encouraging user-generated-content on social media. For example, the latest #MYCALVINS campaign is titled "I Speak My Truth" and presents some of today's most influential public figures like Shawn Mendes and Kendall Jenner telling their personal stories.

With this group being 69% more likely to use social media to follow celebrities, Calvin Klein is skillfully winning advocates over by resonating with the social awareness image which these consumers are keen to project. The campaign also allows people to select products based on the celebrity they have been seen on which is a strategy aimed at improving this group's online reputation (Calvin Klein advocates are 45% more likely to promote a brand if it helps them enhance their online status).

CALVIN KLEIN ADVOCATES' ATTITUDES

% of Calvin Klein advocates who agree with the following (sorted by index)

Question: To what extent do you either agree or strongly agree with the statements below?
Source: GlobalWebIndex Q1 2019 **Base:** 2,888 Calvin Klein advocates aged 16-64

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, GlobalWebIndex interviews over 575,000 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**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from **GlobalWebIndex's Q1 2019** wave of research across 45 countries, with a global sample of 139,397 respondents.

Argentina	1,573
Australia	4,038
Austria	1,289
Belgium	1,274
Brazil	2,366
Canada	2,274
China	15,350
Colombia	1,314
Denmark	1,264
Egypt	1,770
France	5,035
Germany	5,055
Ghana	990
Hong Kong	1,829
India	7,587
Indonesia	1,939
Ireland	1,260
Italy	5,185
Japan	1,804
Kenya	1,024
Malaysia	1,536
Mexico	2,633
Morocco	1,038

Netherlands	1,324
New Zealand	1,280
Nigeria	1,099
Philippines	1,664
Poland	1,850
Portugal	1,292
Romania	1,318
Russia	2,157
Saudi Arabia	1,413
Singapore	2,718
South Africa	1,508
South Korea	1,287
Spain	5,070
Sweden	1,302
Switzerland	1,289
Taiwan	1,790
Thailand	1,602
Turkey	1,513
UAE	1,727
UK	10,102
U.S.A.	25,092
Vietnam	1,573

Notes on Methodology

ACROSS GLOBALWEBINDEX'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 GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically. Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

INTERNET PENETRATION RATES

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data.

Argentina	78%	Netherlands	93%
Australia	88%	New Zealand	93%
Austria	88%	Nigeria	36%
Belgium	89%	Philippines	64%
Brazil	71%	Poland	79%
Canada	94%	Portugal	78%
China	59%	Romania	72%
Colombia	66%	Russia	80%
Denmark	97%	Saudi Arabia	83%
Egypt	54%	Singapore	85%
France	85%	South Africa	62%
Germany	88%	South Korea	95%
Ghana	48%	Spain	87%
Hong Kong	91%	Sweden	96%
India	42%	Switzerland	96%
Indonesia	39%	Taiwan	83%
Ireland	87%	Thailand	58%
Italy	62%	Turkey	71%
Japan	92%	UAE	95%
Kenya	43%	UK	96%
Malaysia	83%	U.S.A.	80%
Mexico	69%	Vietnam	55%
Morocco	69%		

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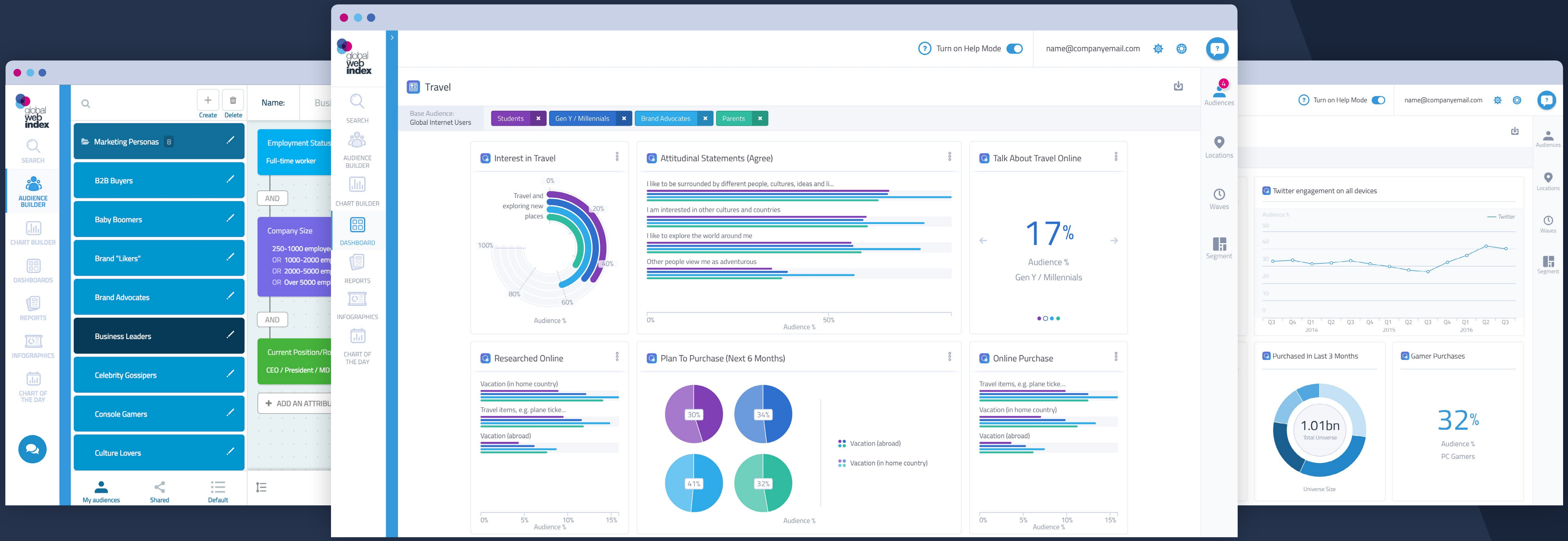

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