globalwebindex

Product Reviews and Commerce

Examining the role of product reviews in the digital purchase journey

AUDIENCE REPORT 2018

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Contents

Introduction

GlobalWebIndex Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population. In this report, we place the spotlight on **Product Reviewers**.

This report explores:

- **Profiling Product Reviewers** – What are some of the defining attributes of this consumer segment?
- **The Purchase Journey** – How do Product Reviewers discover, research and interact with brands while online, and what do they value most from their favorite brands?
- **Brand Advocacy** – What would persuade Product Reviewers to promote their favourite brands online, and what specific types of products and services would they promote?

DEFINING PRODUCT REVIEWERS

In this report, respondents are categorised as Product Reviewers if they "have left feedback or a review on a brand's website in the last month," or have "posted a review of a product, company or service online in the last month." (Link)

The definition of Product Reviewers rendered a sample of 38,317 respondents from 44 countries, including 9,009 in China, 5,402 in the USA, 2,468 in the UK and 2,214 in India. This sample was compared to two groups: Review Readers are those that read, and potentially post, reviews (n = 28,676), and Exclusive Readers, who read reviews but don't post them (n=13,495).

To re-create this audience, access Audience Builder on our Platform.

Key Insights

People who leave product reviews tend to be **younger and higher earners.** They are typically more **open-minded, adventurous and status-seeking.** They are conscious of their social status and enjoy looking after their appearance.

Exclusive Readers are typically **older and lower earners**, who like to be **economical** and **stay informed** about their purchasing decisions.

Age differences between these two groups are reflected in their personal interests. Exclusive Readers cite many more **domestic topics,** such as cooking, reading, current affairs, decorating and petcare, as personally interesting. Reality TV, gaming and gambling are the lowest indexing interests for this group.

Product Reviewers, on the other hand, index highest for topics such as environmental issues, personal finance, business, urban and modern art, reality TV and volunteer work.

Regionally, **China** has a **much higher proportion of Product Reviewers** due to its **unique digital landscape** where social commerce is more prolific than Western countries.

Less than 3 in 10 Product Reviewers use other consumer reviews for brand discovery. They tend to prefer sources that are **more knowledgeable** than them, such as reviews from expert bloggers, endorsements from well-known individuals and personalized purchase recommendations on websites

Reviewing is not a reflection of individual interests, but a result of Reviewers' **expressive and status-seeking personalities**.

Product Reviewers have **unusual spending habits**: common purchase drivers, such as **free delivery or discounts and coupons, hold less sway** for this group.

Only **4 in 10** would consider **advocating** for a specific brand if they were given **free rewards**. Reviewers are much more likely to advocate when something **appeals to their personality**, such as **enhancing their online reputation** and status, **access to exclusive content** or services, or making them feel **involved and included**.

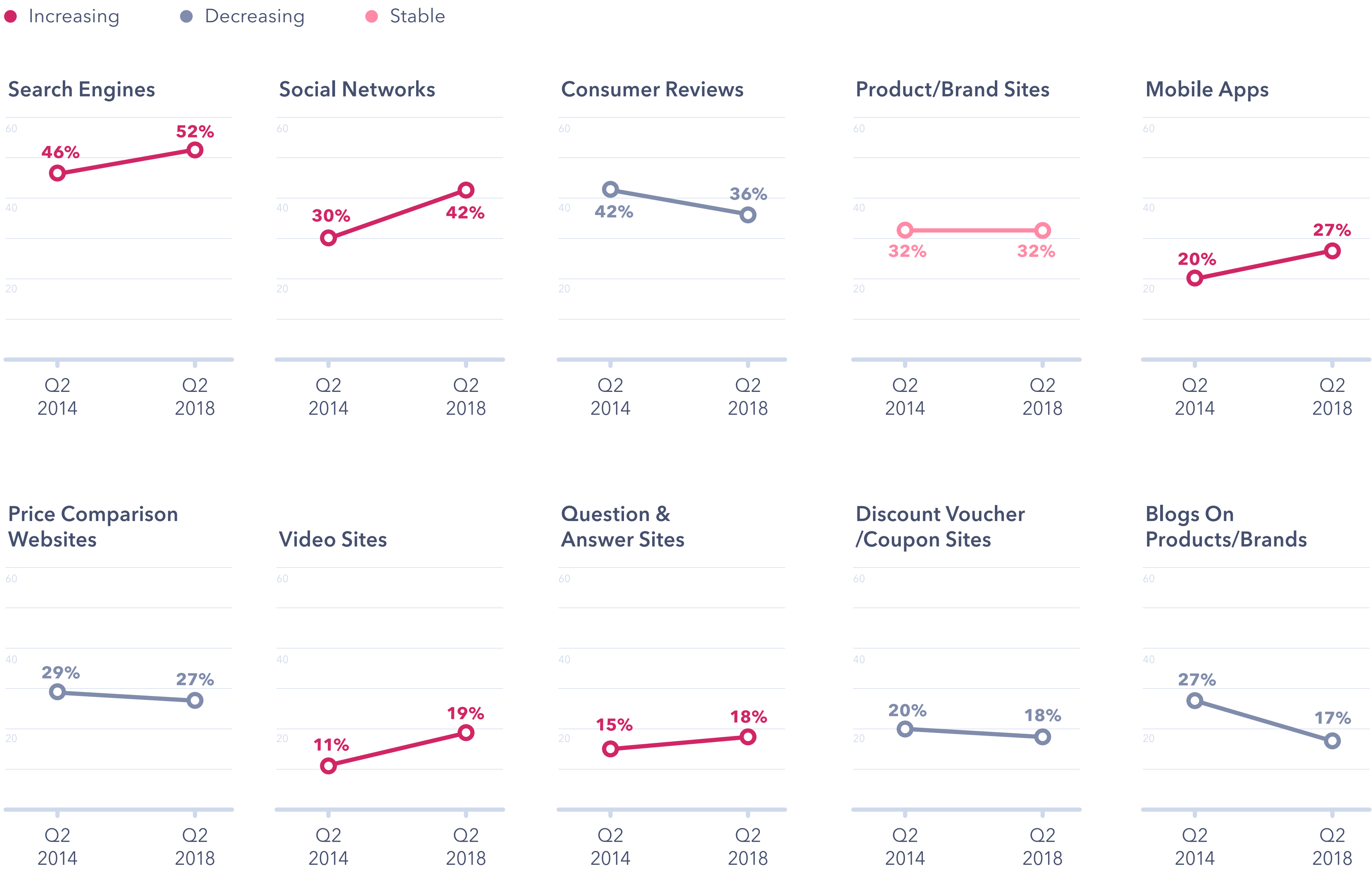
Product Reviews and Commerce

The Relevance of Reviewers

Audience Report 2018

Why Product Reviewers?

THE IMPORTANCE OF REVIEWS RELATIVE TO OTHER SOURCES OF PRODUCT RESEARCH



Question: 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 Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Consumer reviews (usually) provide an independent, authentic evaluation from the customer's perspective, and can **strongly influence other consumers' product and brand attitudes, and purchasing behavior**. Yet, compared to the online global population, Product Reviewers are less likely to consider themselves brand-conscious person (IDX 0.68), less likely to buy brands they see advertised (IDX 0.71) and less likely to stick to a brand even when they do like it (IDX 0.92).

They're an elusive group, and can be hard to characterize and therefore market to. In particular industries where reviews are known to play an important role, such as technology or travel, brands need to not only understand their primary consumer, but also the reviewer consumers, and how these groups differ.

Having a better understanding of the unique characteristics of review consumers, what makes them tick, and how they differ from those who just read reviews, could offer brands a rare insight into potentially key advocates for their products and services.

The top three sources for product research have remained constant over the past four specific years. Search engines remain comfortably top of the list, followed by social media and product reviews. Despite a six-percentage point decrease in those using reviews for their research, they remain unarguably vital when consumers need to know more about a brand and their products. That said, social media has increasingly become a consumer favourite for research. With over 98% of all internet users visiting or having used a social network within the past month, social media has an integral, and often unavoidable, role in most consumer's lives. You might therefore imagine reviews have lost out to social media feedback at all three stages of the product journey – discovery, research, and purchase.

However, our data reveals that product reviews remain important at every stage of the consumer's purchase journey. Despite more consumers now turning to social media to research brands and products, reviews are still consistently used more than social media as an ultimate purchase driver, despite the increasing problem with user-review credibility and review manufacturing.

Since 2015, social media has seen relatively little increase as a source of brand discovery or as a driver of purchases later in the consumer journey, while there has been a 40% jump in the share of consumers who cite social networks as a main source for researching brands – from 30 to 42%. This large increase over a relatively short amount of time suggests that social media could be poised to become to the default resource when they need relevant and accessible information about a brand, product or service. Input from other consumers is as important – if not more – now as it was a few years ago, but the increase in interest in this type of content seems to be being funnelled through social media.

Product reviews therefore still hold massive sway towards the latter stages of the purchase journey, especially in persuading or dissuading a consumer from taking the final step and committing to a purchase. **36% of consumers say that reviews would most increase their likelihood of buying a product**, while only 20% said the same of social media. Brands shouldn't just ensure that their social channels make product research easy and enjoyable, but equally that good product reviews are showcased once the consumer has narrowed the list to a single product.

COMPARING REVIEWS VS. SOCIAL MEDIA OVER TIME ACROSS THE PURCHASE JOURNEY

Reviews have maintained their lead at the end of the purchase journey, but social sources have overtaken in the research phase.

TripAdvisor Moving From User Reviews Towards Professional Content

To combat the growing problem of declining user-review credibility, TripAdvisor has unveiled plans to overhaul trip information and opinion content by expanding beyond consumer reviews, adding hundreds of sources from social media influencers, well-known consumer brands, publishers and travel partners.

TripAdvisor hopes to increase the user-engagement and trustworthiness of its content by placing consumer reviews, which now total more than 660 million, alongside the more professional content (although arguably the trustworthiness of influencers' opinions is still debatable).

Question: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

PURCHASE JOURNEY ACROSS GENERATION, INCOME AND ATTITUDINAL SEGMENT

		Discovery	Research	Purchase
GENERATION	Gen Z	21%	31%	35%
	Gen Y/Millennials	24%	35%	36%
	Gen X	24%	38%	36%
	Baby Boomers	22%	41%	37%
INCOME	Bottom 25%	20%	32%	33%
	Mid 50%	25%	38%	38%
	Top 25%	28%	40%	36%
ATTITUIDINAL SEGMENT	Altruist	29%	41%	40%
	Aspirational	29%	42%	41%
	Cosmopolitan	28%	40%	37%
	Economical	20%	40%	40%
	Image Conscious	29%	42%	41%
	Informed	26%	44%	44%
	Privacy Conscious	25%	39%	39%
	Spontaneous	19%	33%	33%
	Status Seeker	28%	38%	37%
	Technophile	31%	47%	46%

Reviews play a significant role at each point in the purchase journey for consumers of every generation, income and attitudinal profile.

- By generation, the key difference appears to be that Gen Z are less likely to use third-party reviews for brand research than older generations, but show similar percentages for brand discovery and purchase.
- Although the differences are small, lower income individuals are less likely to use reviews across all three stages compared to the top 25% of income earners.
- Finally, when segmenting by different attitudinal characteristics, people with above-average interests in technologies – classified as Technophiles – stand out as the consumers who are most likely to use reviews at each stage of the purchase journey. Technophiles are a group that are defined by their need to be connected online, and therefore it's unsurprising that they consistently integrate online content into answering questions they have about products or brands. Spontaneous individuals – those who tend to make decisions quickly, based on a gut feeling – are the least likely to use reviews to assist in their research or purchasing decisions.

Source: GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

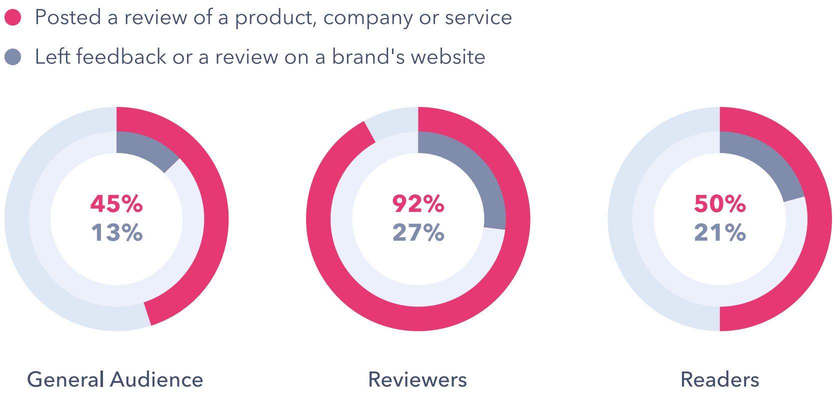
Product Reviews and Commerce

Profiling Product Reviewers

Audience Report 2018

Attitudinal Segmentation

THE PREVALENCE OF REVIEWING



Review Readers don't confine themselves to reading; they're more likely to both post a review about a product, and leave feedback on a brand's website, compared to the general population

On a global scale, 45% of the general population post a review about a product, service or company, and 13% leave feedback or a review on a brand's website. Review Readers are significantly more likely to both post a review (50%) and leave feedback on a website (21%).

People who leave online reviews are more **adventurous** and **open-minded**, both in terms of trying new products and exploring new cultures. Over two-thirds (67%, IDX 1.24) would like to pursue a life of novelty, challenge and change, which also means they're much more likely than Exclusive Readers to **buy a product or service simply for the experience of being part of the community** around it (47% vs. 21%).

READERS/REVIEWERS FALL INTO DISTINCT ATTITUDINAL SEGMENTS

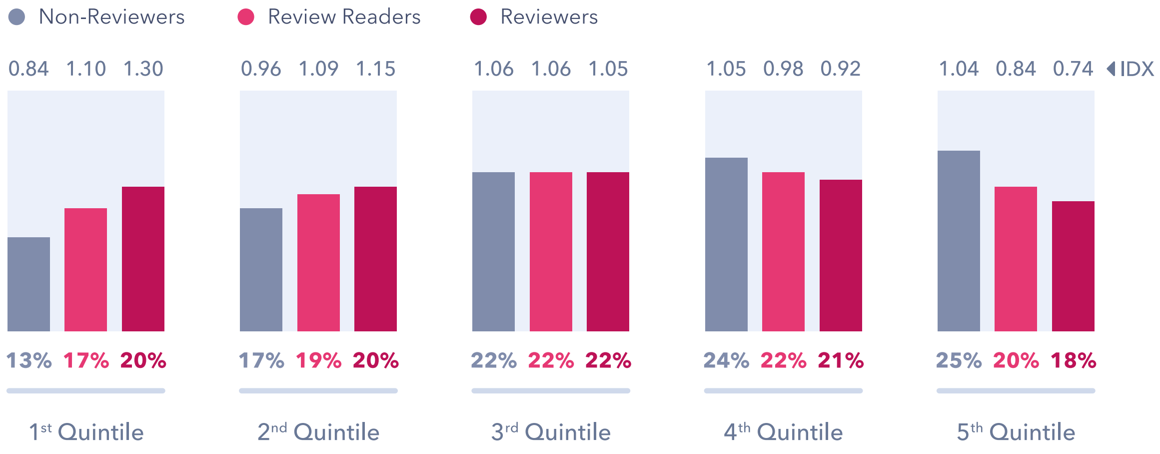
	Reviewers		Exclusive Readers		Review Readers	
Cosmopolitan	26%	1.36	15%	0.75	21%	1.10
Status Seeker	47%	1.31	26%	0.73	38%	1.06
Altruist	46%	1.22	38%	0.99	46%	1.20
Aspirational	42%	1.16	37%	1.02	44%	1.21
Image Conscious	21%	1.08	21%	1.09	24%	1.21
Privacy Conscious	64%	1.05	64%	1.05	66%	1.08
Technophile	26%	1.05	31%	1.28	34%	1.38
Spontaneous	8%	0.91	8%	0.90	7%	0.83
Informed	22%	0.82	41%	1.52	35%	1.28
Economical	10%	0.66	22%	1.44	16%	1.05

They enjoy being among the first to try a new product or the latest technology (60%, IDX 1.25), and then share their opinion on it, as this reflects well on them. Indeed, Reviewers are **conscious of their social status**, often wanting to stand out from the crowd and look after their image and appearance. This implies that one of the largest driving factors for their reviewing behavior is that they know other people will see, and listen to, their opinions. They enjoy being seen as knowledgeable, regardless of the subject material. Reviewing could also provide a space that allows them to publicly display the products they buy, and their opinions on them, without looking boastful.

Question: In the past month, which of the following things have you done on the internet via any device? // Which of the following actions have you done online in the past month? **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Question: This data is auto-generated based on responses to the Attitudinal Statements **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

REVIEWERS HAVE AN UPWARD SOCIOECONOMIC SKEW



Exclusive Readers like to be economical and do their research when making purchasing decisions. Over 86% agree that it is important to be well informed about things, and 81% always try to find the best deals for products they want to buy. These findings reflect a consistent pattern of cautious money-management among this group: they're also are less likely to borrow money (IDX 0.57) or buy a premium version of a product (IDX 0.80), and much less likely to consider themselves affluent (0.60 IDX).

The two distinct attitudinal profiles of Product Reviewers and Review Readers in part reflects their relatively higher income . As shown in Table 5 , *"Over-indexing of reviewing in the first quintile"*, Review Readers slightly under-index in the 1st and 2nd income quintiles, and slightly over-index in the 3rd, 4th and 5th quintiles. Product Reviewers, on the other hand, are 30% more likely than the global population to earn in the 1st quintile. The two groups may therefore have very different purchasing powers, which are reflected in the way they search and choose products to purchase.

Brands should attune themselves with the characteristics of a typical reviewer. Understanding that someone who leaves product reviews is likely to be more **open-minded, higher-income and status-seeking**, versus the more cautious review reader, could be key to developing **lasting relationships with these potential brand advocates**.

Question: This data is auto-generated based on responses to the Attitudinal Statements **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Personal Interests

READERS AND REVIEWERS DIFFER MARKEDLY IN THEIR PERSONAL INTERESTS

Reviewers	%	IDX
Environmental issues	28%	1.16
Personal finance / investment	28%	1.16
Economy / finance	25%	1.18
Business	21%	1.23
Volunteer / charity work	19%	1.17
Entrepreneurship / start-ups	18%	1.23
Reality TV shows	18%	1.20
Celebrity news and gossip	16%	1.17
Urban and modern art	13%	1.24
Dance entertainment	13%	1.21

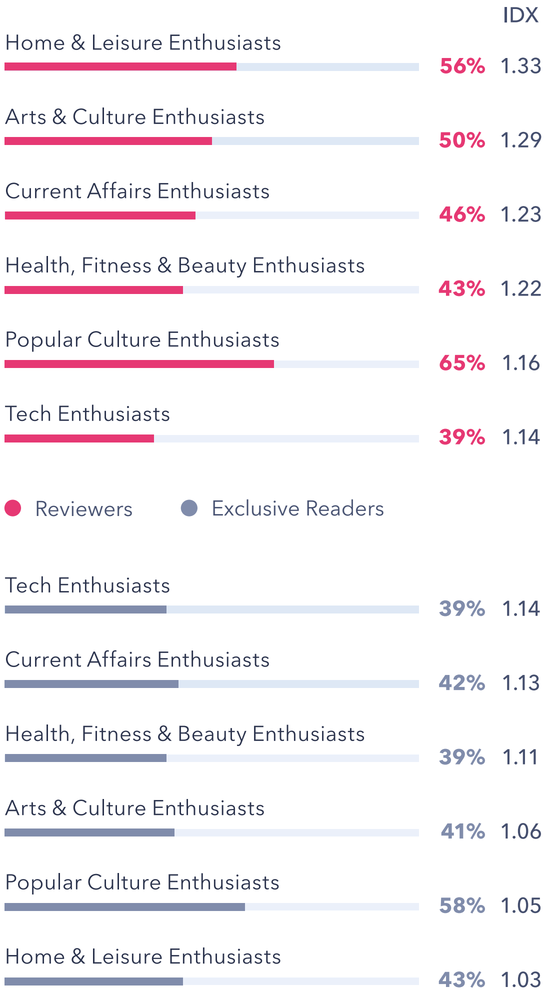
Exclusive Readers	%	IDX
Food / restaurants / cooking	55%	1.26
Books / reading	52%	1.32
News / current affairs	50%	1.32
Travel and exploring new places	47%	1.31
Personal healthcare	39%	1.32
Wildlife / nature	36%	1.31
Decorating / DIY / home improvements	35%	1.41
Pets / pet care	31%	1.30
Environmental issues	28%	1.25

● Reviewers ● Exclusive Readers

Reviewers and Exclusive Readers differ markedly in the topics that personally interest them. For Reviewers, topics such as environmental issues (28%), personal finance and investment (28%), economy/finance (25%), business (21%) and charity work (19%) rank highest among their interests. Exclusive Readers, on the other hand, rated food/cooking (55%), books/reading (52%), news/current affairs (50%) and travel (47%) as the topics that most interested them. With such varying interests between the two groups, it's important to understand how this can lead to challenges when addressing two differences audiences for the same products.

Question: Here is a list of topics that may interest you. Can you please indicate which of these you are strongly interested in? **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

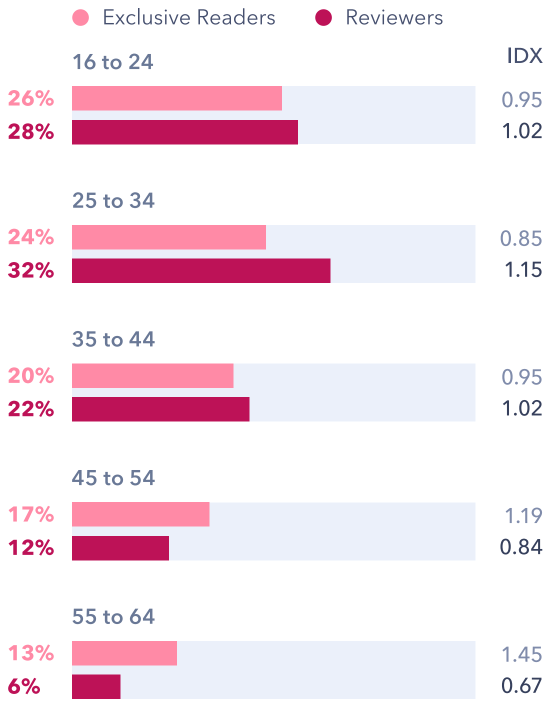
REVIEWERS AND EXLUSIVE READERS' DISTINCT INTEREST SEGMENTATIONS



The two groups' personal interests are reflected in their distinct interest profiles: Reviewers over-index as tech (39%, IDX 1.14) current affairs (42%, IDX 1.13) and health, fitness and beauty enthusiasts (39%, IDX 1.11), whereas Exclusive Readers are more likely to be categorised as home and leisure (56%, IDX 1.33), arts and culture (50%, IDX 1.29), current affairs (46%, 1.23), health, fitness and beauty (43%, IDX 1.22) and popular culture enthusiasts (65%, IDX 1.16).

Generally speaking, both groups fit into more interest segmentations compared to the general population, which implies that both groups overall are bigger content consumers. Exclusive Readers also tend to index higher on personal interests, especially for domestic topics such as cooking, books, home improvement/decorating, and pet/petcare. The higher indexes may reflect the fact that these topics generally have less content and discussion online, but could also be a result of the differing ages of the two groups: Reviewers over-indexed (IDX 1.15) for 25-34 year olds, but under-indexed for 45-54 (IDX 0.84) and 55-64 (IDX 0.67), while the opposite was true for Exclusive Readers.

REVIEWERS AND NON-REVIEWERS TEND TO BE IN SEPARATE AGE GROUPS



Question: This data is auto-generated based on responses to the Personal Interests question **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Question: How old are you? **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Region

China's unique digital landscape, with its mobile-first consumer behavior, innovative social commerce model, and trusted digital payments infrastructure, mean that the Asia Pacific region has a proportionately higher ratio of Reviewers (69%, IDX 1.17) to Exclusive Readers (46%, IDX 0.77) compared to other regions. In China, **social commerce** has exploded in popularity over the past two years – a new form of e-commerce which involves social interactions among consumers, who then also play a part in encouraging others to purchase items.

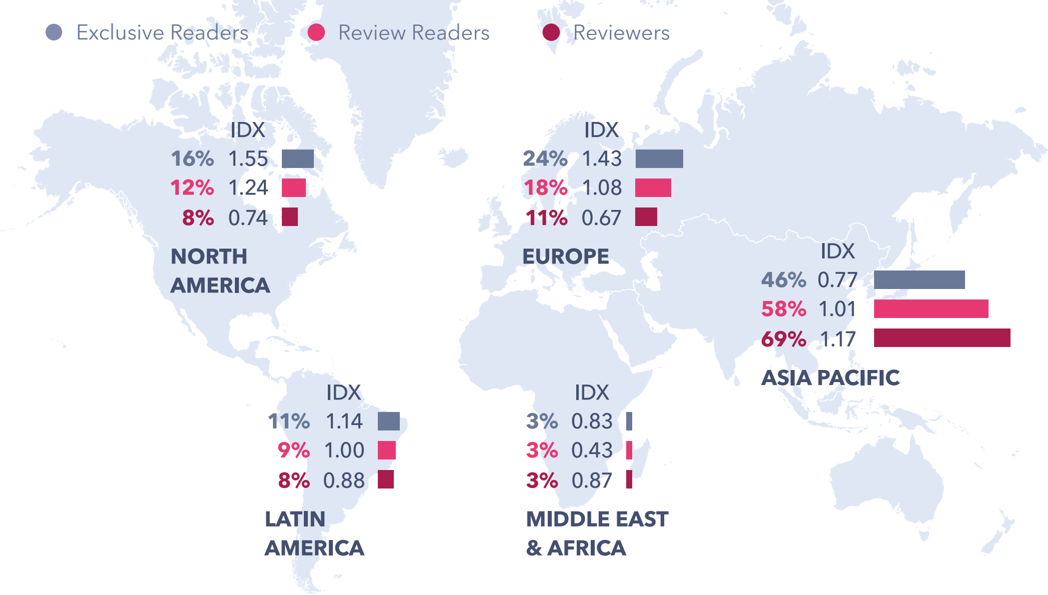
The pervasive use of smartphones among China's population is a key factor enabling social commerce, as well as the word-of-mouth promotion channels that many e-commerce businesses are now looking to to increase user engagement and increase their influencing effect. Messaging services, such as the hugely popular WeChat, are allowed to sit between interpersonal messaging and message-based advertising because of China's integrated ecosystem which allows chat, payments, search and shopping to all be carried out in the same space.

The pattern reverses for the Europe and North America regions, where Exclusive Readers (24% IDX 1.43, 16% IDX 1.55 respectively) far outnumber Reviewers (11% IDX 0.67 , 8% IDX 0.74). This reveals how e-commerce has yet to take on the social aspect found in other markets, and most social commerce ventures seen so far in the West remain, in spite of their name, geared towards individuals. The 'social' part comes from either integrating e-commerce features into an existing social network, such as by adding a 'Buy' button to Twitter, Facebook or Pinterest, or by fusing social and e-commerce features on new platforms.

Alibaba Set To Continue Strong Top-Line Growth

Alibaba has seen strong organic revenue growth across business segments in recent years, and acquisitions have further added to the company's top-line growth. Over the past few years, Alibaba has acquired Singapore-based e-commerce business Lazada, online video streaming platform Youku Tudou for its digital media and entertainment segment, Cainiao for global logistics, and most recently Ele.me food delivery services. Forbes report that they expect Alibaba to continue on its current trend, forecasting a 30-35% annual growth in revenue by the end of the decade, with international commerce revenue increasing at over 50% annually in the same period. With nearly 60% share of the e-commerce market in China, and a meaningful presence in international markets across Asia, Europe and Latin America, Alibaba is well on its way to truly becoming a global brand.

REVIEWERS OVER-INDEX IN APAC MARKETS



Until now, consumers have been given no real reason or benefit from choosing to buy through a social network rather than going direct to the retailer's e-commerce site. These benefits must be intrinsically social, and must be grounded in consumer-engagement strategies, in order for Western social commerce to achieve the roaring success seen in China. If and when that happens, we would expect to see a shift in the ratio of Readers to Reviewers in Western countries.

Pinduoduo: China's New Social Commerce App

Pinduoduo's model, which combines low prices with group discounts that users can lock in by rounding up their friends on social media, has seen it quickly rise to the ranks of China's top e-commerce companies, threatening e-commerce giants like Alibaba and JD.com.

Despite being less than three years old, Pinduoduo already has more than 300 million users. A key factor in Pinduoduo's success has been its seamless integration with China's most popular chat app, WeChat, thanks to its 'mini program' functionality that allows users to open up other apps without ever leaving the app.

Question: World regions (this data is auto-generated based on country)
Source: GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Product Reviews and Commerce

The Purchase Journey

Audience Report 2018

Discovery

REVIEWERS AND READERS BOTH UTILISE MANY SOURCES FOR BRAND DISCOVERY

	Reviewers		Exclusive Readers		Review Readers	
Consumer review sites	**1.26**	28%	**2.89**	64%	**2.34**	52%
Personalized purchase recommendations on websites	**1.36**	20%	**1.74**	27%	**1.15**	17%
Forums/message boards	**1.36**	18%	**1.77**	23%	**1.17**	15%
Posts or reviews from expert bloggers	**1.35**	19%	**1.90**	27%	**1.39**	19%
Endorsements by celebrities or well-known individuals	**1.32**	18%	**1.55**	22%	**1.07**	15%
Consumer review sites	**1.26**	28%	**2.89**	64%	**2.34**	52%
Recommendations/comments on social media	**1.20**	28%	**1.66**	41%	**1.39**	33%
Word-of-mouth recommendations	**1.01**	32%	**1.68**	52%	**1.63**	51%

64% of people who read reviews use review sites as one of the main ways they find out about new brands, products and services (IDX 2.89), but overall, discovery is the stage in the purchase journey where review sites play the smallest role, judging by the number of respondents who cite it as a main source.

These respondents also massively over-index on all other forms of brand discovery, including word of mouth recommendations (52%, IDX, 1.63), reviews from expert bloggers (27%, IDX 1.90), personalized purchase recommendations on websites (27%, IDX 1.74) and forums and message boards (15%, IDX 1.77). This group clearly values third-party input, as it gives them the ability to make comparisons and verifications that provide context for future purchasing decisions or interactions with a brand.

Similar over-indexing is found for Exclusive Readers. Word-of-mouth recommendations from friends or family was listed by more than half (51%, IDX 1.63) of Exclusive Readers as a main way that they discover new brands and products, compared to just 32% of Product Reviewers (IDX 1.01). The tendency to rely on more traditional forms of advocacy could reflect Exclusive Readers generally being older, or because they assign less value to opinions originated for the media, instead opting for more credible recommendations from people they know.

People who leave online reviews show different preferences for brand discovery than Exclusive Readers. For one, **only 28% of Reviewers actually use consumer review sites for brand discovery**. They do over-index compared to the rest of the online population, since they have an above-average interest in reviews and inevitably visit review sites, but *other people's reviews* are still a minority source for them. Reviewers are also relatively less likely to rely on verbal recommendations from friends and family, with only 32% saying they use this as a source of discovery (IDX 1.01). Rather, Reviewers index highest on sources such as personalized purchase recommendations on websites (20%, IDX 1.36), forums/message boards (18%, IDX, 1.36) and reviews from expert bloggers (19%, IDX 1.35). Given the attitudinal differences between Reviewers and Review Readers, this suggests that Reviewers prioritize sources that come from a **more** knowledgeable source than themselves (i.e. website recommendations, experts or well-known influencers), which in turn suggests a different motivation behind posting reviews than simply sharing their reactions.

Question: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Research

Brand and product research follows similar lines as brand discovery; both Review Readers and Reviewers over-index for many of the information sources, as they are people who have indicated an above-average interest in reading or writing about products. However, they do have distinct preferences when it comes to where to look for additional information about a particular brand once they have discovered it.

Although 9 in 10 Review Readers use consumer reviews as their primary source of research, they don't limit themselves to just consumer reviews – they are more likely than the general online population to use any source of information that was surveyed. Exclusive Readers also use a variety of sources alongside consumer reviews, namely product/brand sites (44%, 1.38), independent review sites (25%, IDX 1.60), price comparison sites (39%, IDX 1.48), social network sites (39%, IDX 1.04), and search engines (62%, IDX 1.29).

Interestingly, search engines were the **only source** that Reviewers were relatively less likely to use, and only **4 in 10 Reviewers use consumer reviews** when actively researching brands and products. As a technophilic group, Reviewers may view search engines and other consumers' reviews as an inefficient means of research, especially if they had specific sources that they considered more credible or reliable.

The sources that Reviewers indexed highest for – micro-blogs (17%, IDX 1.44), online pinboards (e.g. Pinterest; 13% IDX 1.44), and live chat services (19%, IDX 1.42) – all under-indexed for Exclusive Readers. These results could reflect the average age differences between the two groups, or Reviewers' more open-minded personality type. Reviewers and Exclusive Readers both appear not to want to restrict themselves when researching for a product or service, but would rather use a multi-channel approach to get the most broadest picture possible.

REVIEWERS AND READERS DON'T LIMIT THEMSELVES TO ONE SOURCE TO RESEARCH BRANDS, PRODUCTS AND SERVICES

	Reviewers		Exclusive Readers		Review Readers	
Consumer reviews	**1.07**	39%	**2.51**	90%	**2.50**	89%
Specialist/independent review sites	**1.26**	20%	**1.60**	25%	**1.93**	30%
Price comparison websites	**1.10**	29%	**1.48**	39%	**1.64**	44%
Product/brand sites	**1.08**	34%	**1.38**	44%	**1.50**	49%
Question & Answer sites	**1.24**	23%	**1.31**	24%	**1.66**	30%
Search engines	**0.94**	46%	**1.27**	62%	**1.23**	64%
Blogs on products/brands	**1.31**	21%	**1.24**	20%	**1.63**	28%
Forums/message boards	**1.31**	20%	**1.15**	17%	**1.63**	25%
Social networks	**1.13**	43%	**1.04**	39%	**1.19**	50%
Online pinboards (e.g. Pinterest)	**1.44**	13%	**0.77**	7%	**1.41**	13%
Mobile apps	**1.24**	32%	**0.77**	20%	**1.17**	32%
Micro-blogs (e.g. Twitter)	**1.44**	18%	**0.65**	8%	**1.35**	17%
Messaging/live chat services	**1.42**	19%	**0.59**	8%	**1.31**	18%

Question: 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 Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Purchase

REVIEWERS AND READERS ARE CONVINCED BY DIFFERENT FACTORS TO PURCHASE

	Reviewers		Exclusive Readers	
Reviews from other customers	**1.05**	38%	**2.36**	85%
Free delivery	**0.92**	54%	**1.32**	77%
Coupons and discounts	**0.97**	44%	**1.37**	62%
Easy returns policy	**1.05**	36%	**1.37**	50%
Loyalty points	**1.09**	33%	**1.37**	36%
Quick/easy online checkout process	**1.10**	33%	**1.32**	41%
"Likes" or good comments on social media	**1.27**	26%	**1.23**	25%
Entry into competitions	**1.25**	21%	**1.21**	12%
Exclusive content or services	**1.36**	20%	**1.05**	14%
Click & Collect delivery	**1.35**	19%	**0.97**	11%
Live-chat box so you can speak to the company	**1.33**	18%	**0.77**	14%
Option to use "buy" button on a social network	**1.50**	16%	**0.75**	7%

At 54%, free delivery has a 10 percentage-point lead over every other factor in the final stage of the online purchase journey for Product Reviewers. However, this is the case for most audiences – in relative terms, free delivery actually underperforms (IDX 0.92). More distinctively, Reviewers are 50% more likely than the general population to list 'buy' buttons on social networks as the factor that would most increase their likelihood of buying a product.

Other drivers that over-perform with Reviewers are exclusive content (20%, IDX 1.36), click & collect delivery (19%, IDX 1.35), live-chat boxes (18%, IDX 1.33) and entry into competitions (21%, IDX 1.25). These are not purchase drivers that usually resonate with consumers. This tells us that Reviewers are clearly unusual in their shopping habits.

Reviewers want brands to go above and beyond what they would usually offer in order to win them over

As with brand discovery and research, **reviews from other customers are not a determining factor for Reviewers when making purchasing decisions**. Only 38% said that this was a purchase driver, compared to 85% of Exclusive Readers. For the latter group, the top performing purchase drivers were a bit more predictable: free delivery (77%, IDX 1.32), coupons and discounts (62%, IDX 1.37), easy returns policy (50%, IDX 1.45) and a quick and easy online checkout process (41%, IDX 1.37). Perhaps less critical, or more easily satisfied, Review Readers tend to be won over by the more prevalent purchase drivers.

Question: When shopping online, which of these features would most increase your likelihood of buying a product? **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

Product Reviews and Commerce

Brand Advocacy

Brand Advocacy

REVIEWERS MOST LIKELY TO ADVOCATE FOR A BRAND WHEN THEIR REPUTATION IS ENHANCED

	Reviewers		Exclusive Readers		Revie Readers	
When something enhances my online reputation/status	**1.40**	19%	**1.22**	16%	**0.69**	9%
Access to exclusive content or services *(e.g. music, videos, etc)*	**1.30**	21%	**1.32**	22%	**0.94**	16%
The feeling of taking part/being involved	**1.27**	27%	**1.29**	27%	**0.89**	19%
When I have a personal/one-on-one relationship with a brand	**1.26**	22%	**1.37**	24%	**1.06**	18%
Having insider knowledge about the brand or its products	**1.25**	23%	**1.39**	26%	**1.08**	20%
When something is relevant to my friends' interests	**1.20**	24%	**1.37**	28%	**1.11**	23%
Love for the brand	**1.15**	38%	**1.26**	42%	**1.06**	35%
When I've received great customer service	**1.07**	35%	**1.48**	48%	**1.41**	46%
When something is relevant to my own interests	**1.07**	35%	**1.38**	46%	**1.28**	42%
High-quality products	**1.04**	51%	**1.35**	66%	**1.28**	63%
Rewards *(e.g. discounts, free gifts, etc)*	**0.94**	41%	**1.33**	58%	**1.36**	59%

As with any brand which wants to maintain its reputation, ensuring consumers speak positively about their experiences is of great importance – both offline and online. For Reviewers, high quality products (51%, IDX 1.04) are most likely to encourage brand advocacy. However, compared to the global population, **Reviewers are 40% more likely to promote a brand online if it will enhance their online reputation, 30% more likely if they have access to exclusive content or services, and 27% more likely if they have feeling of community**. Conversely, these three motivations underperform across the board for Exclusive Readers.

Exclusive Readers also point out high-quality products as a key factor for brand advocacy, with 63% saying it would motivate them to promote their favourite brand online. Exclusive Readers are relatively more likely to respond positively to rewards (59%, IDX 1.36), great customer service (46%, IDX 1.31), and when something is relevant to their own interests (42%, IDX 1.28).

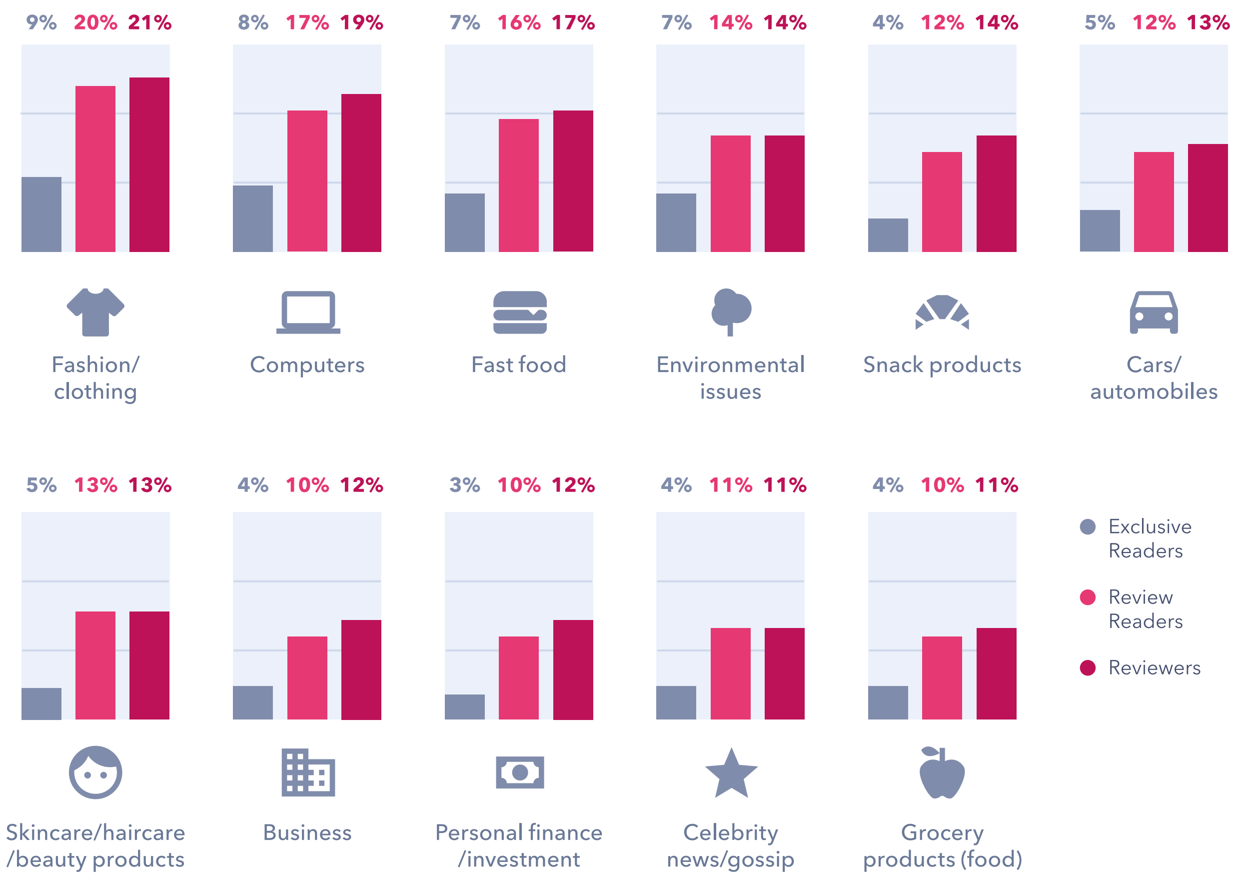
For Reviewers, rewards are the only under-indexing factor for brand advocacy (IDX 0.94). Only 4 in 10 Reviewers indicate they would motivated to promote a brand if they received discounts or free gifts. This isn't to say that rewards wouldn't increase satisfaction or motivation with a brand, but it appears that Reviewers are most persuaded to post favourably about a product or service when a brand offers them something they can't buy.

By heightening Reviewers' status in the brand's community, and making sure that their voices are particularly valued, brands ensure that Reviewers feel respected and, in turn, will more likely advocate for that brand.

Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users Aged 16-64

What are Reviewers posting about?

BRAND ADVOCACY FOR DIFFERENT PRODUCT CATEGORIES



Product Reviewers are vocal about their opinion, and do not limit themselves to a particular topic, product or brand

Reviewers over-index for every product category, with the largest percentage talking about fashion and clothing (21%), followed by computers (19%) and fast food (17%). However, these percentages correlate very highly with Review Readers and Exclusive Readers, to such an extent that there is no appreciable difference between the topics that Review Readers and Exclusive Readers discuss online.

Similarly, Product Reviewers aren't posting about specific brands at any sort of unique frequency. This tells us that Product Reviewers should not be considered a small group of people that have unifying passions that they love to review, but rather that the propensity to leave reviews is a separate, distinguishing factor that is more closely related to attitudes than interests. Reviewing is therefore not a reflection of niche interests, but a by-product of expressiveness. Generally speaking, Product Reviewers are vocal about their opinion, and do not limit themselves to a particular topic, product or brand.

Question: Which of these products, services or topics have you posted opinions about online in the past month? **Source:** GlobalWebIndex Q2 2018 | **Base:** 540,677 Internet Users 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 400,000 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 GlobalWebIndex 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 GlobalWebIndex'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 Q2 2018 wave of research across the following markets, with a global sample of 109,780 respondents. Among this sample, there were 38,317 Product Reviewers across 44 markets.

	TOTAL	Product Reviewers
Argentina	1,559	455
Australia	2,282	527
Austria	1,280	335
Belgium	1,266	285
Brazil	2,345	722
Canada	2268	603
China	15,361	9,009
Colombia	1,301	491
Denmark	1,334	291
Egypt	1,771	519
France	3,323	825
Germany	2,846	818
Hong Kong	1,766	580
India	4,138	2,214
Indonesia	1,788	814
Ireland	1,247	351
Italy	2,807	1,027
Japan	1,804	248
Malaysia	1,556	502
Mexico	2,605	978

	TOTAL	Product Reviewers
Netherlands	1,279	247
New Zealand	1,275	286
Philippines	1,577	545
Poland	1,816	573
Portugal	1,283	236
Russia	2,279	525
Saudi Arabia	1,487	339
Singapore	2,496	881
South Africa	1,528	390
South Korea	1,270	348
Spain	2,784	937
Sweden	1,274	229
Switzerland	1,261	277
Taiwan	1,796	473
Thailand	1,538	593
Turkey	1,577	421
UAE	1,768	708
UK	7,709	2,648
USA	15,637	5,402
Vietnam	1,618	638

Notes on Methodology: Internet Penetration Rates

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 2018. 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 2018 based on 2016 ITU data

Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%

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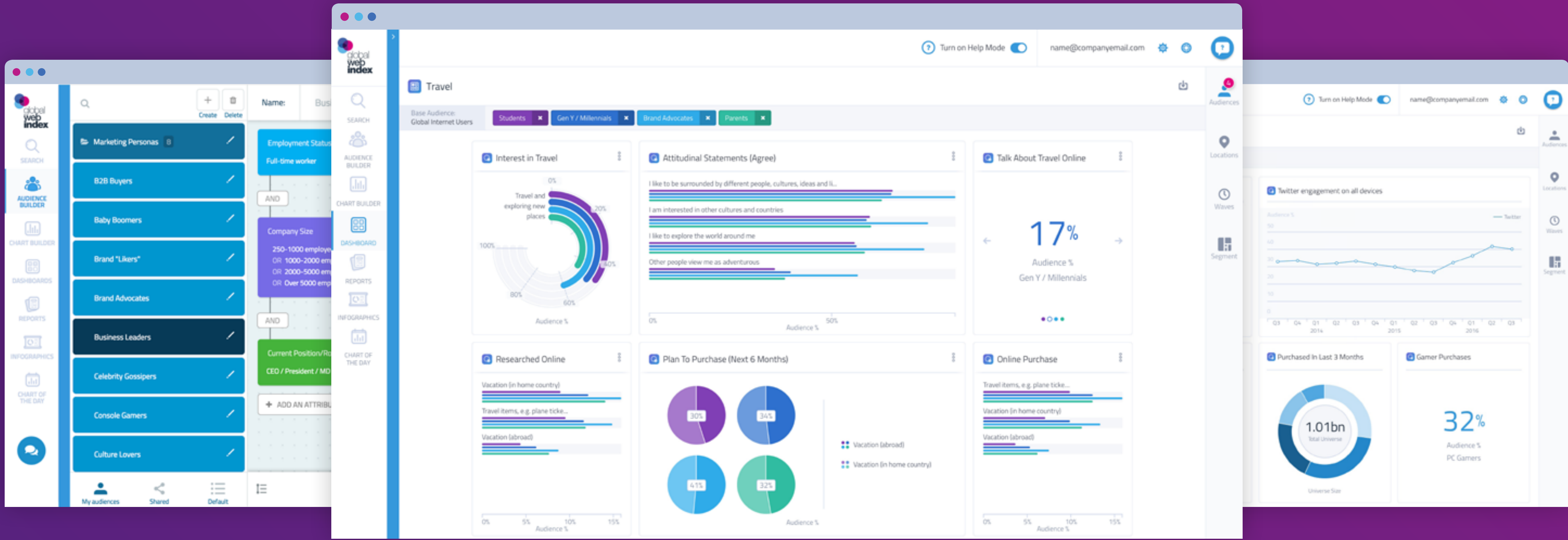

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