

Early Adopters of Technology

Examining the attitudes and behaviors of
Early Adopters, and the opportunities for
tech brands and marketers

AUDIENCE REPORT 2018

www.globalwebindex.com



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Introduction

This GlobalWebIndex Audience report investigates the key attitudes and behaviors of Early Adopters of Technology, looking specifically at their device trends, social networking behaviors, media consumption, online commerce and brand engagement.

This report explores:

- **Demographics and Lifestyle** - What are the defining characteristics of this group?
- **Device** - What are the most important devices and device brands to this group?
- **Social Media Usage** - Which social platforms do Early Adopters prefer and why do they use them?
- **Entertainment** - How much media does this group consume, online and offline?
- **Commerce and Brand Engagement** - How does this group discover and interact with brands online? What can brands do to appeal to an Early Tech Adopter?

DEFINING EARLY ADOPTERS OF TECHNOLOGY

This report defines Early Adopters as people who:

- **Agree that “having the latest technological products is very important to me”**
- **Own any two out of the following three device brackets:**
 1. Smart TV, smart wristband or smartwatch
 2. Virtual reality headset/device
 3. At least two of any smart home products (including voice-controlled smart assistants, smart entertainment products, smart home security products or smart home utility products)

This definition rendered a sample of 12,519 respondents from 40 countries.

To re-create this audience, access our Audience builder on the platform.

Key Insights

The Early Adopters of the world's internet population are most likely to be male (56%), 25-34 (38%), married (62%) and in the top quartile of household incomes (33%).

This is a group that is generally more settled and financially stable, and therefore have disposable income to spend on the latest gadgets.

72% of all Early Adopters can be found in the Asia-Pacific region. Countries in the Asia-Pacific region have been known traditionally for high-tech manufacturing and exports, but their edge extends into the consumer realm as well. Across a range of metrics, consumers in the region stand out for their willingness and interest in adopting new technologies.

Early Adopters have much shorter replacement cycles for mobile phones than the average internet user. **44% are planning to purchase a new mobile phone within the next 6 months, compared to just 29% of the global average.**

This group **have four more social media accounts than the average internet user.**

That they occupy such a wide social portfolio suggests a differentiated approach to social media, where different networks are used for distinct purposes.

Early Adopters are **over 50% more likely to search for products to buy and search for information related to what they're watching on TV.** Moreover, they are more than twice as likely to interact with the online content of the TV show and share their opinion of a TV show while dual-screening.

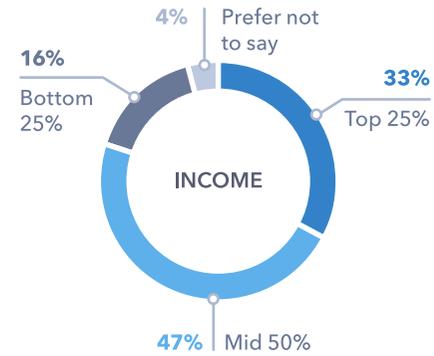
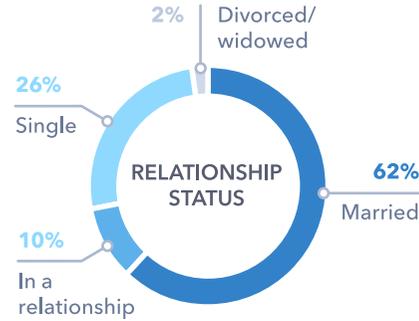
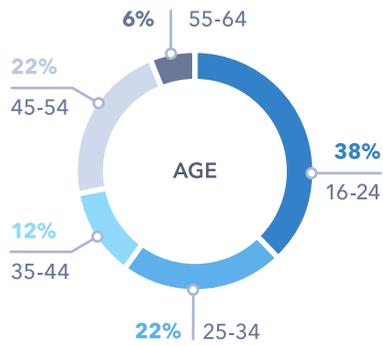
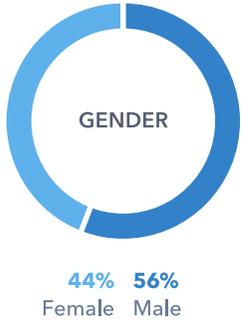
They are much more likely than the average internet consumer to **share brand's posts on social media, as well as engage with brands and their content and offer up their own content.** Connecting with brands is central to how and why this audience uses the internet, and building a powerful owned presence is crucial to reaching them.

They are also 77% more likely to promote a brand online if it will enhance their online reputation, 61% more likely if they have access to exclusive content or services, and 46% more likely if they have a one-on-one relationship with a brand. This group looks for a tailored relationship with a brand, where they receive personalized or unique products and services.

Early Adopters of Technology

Profiling Early Adopters

Profiling Early Adopters



According to Everett Rogers’ theory of how new ideas and technology spread, or, ‘**the diffusion of innovation**’, Early Adopters are the second phase of product purchasers, following innovators. These tend to be some of the most influential people within any market space, and they will often exercise a degree of thought leadership for other potential adopters. They are quick to make connections between clever innovations and their personal needs, which means they tend to be very engaged with what’s going on in the world, and typically rely less on other people for reviews and recommendations.

Our definition of Early Adopters of Technology uses three specific techs that are broadly considered the next wave of consumer technology: wearables, virtual/augmented reality and the Internet of Things (in this case smart home products). From this definition, **15.5% of our global sample are categorized as Early Adopters.**

The Early Adopters of the world’s internet population are most likely to be male (56%), 25-34 (38%), married (62%) and in the top quartile of household incomes (33%). This is a group that is generally more settled and financially stable, and therefore

have disposable income to spend on the latest gadgets. Early Adopters also report holding more wealth and assets than the typical internet user; they are more than twice as likely to own bonds, antiques, cryptocurrency or annuities as types of investments.

As our social grading segmentation allows a true country-by-country comparison, there are key regional differences to understand. The overall figures are somewhat skewed by the high rates of affluent consumers in the Asia-Pacific region, where the internet population tends to be relatively young and wealthy.



Question: Please tell us your gender/How old are you?/What best describes your current marital status?/ This data is auto-generated based on the household income question **Source:** GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Profiling Early Adopters

Type of investments

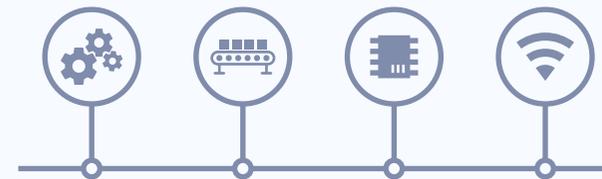
	Cash/savings/pension	81%
	Stocks/shares	39%
	Mutual/Managed Investment Funds	33%
	Gold	32%
	Real estate/property (other than the house you live in)	32%
	Bonds	22%
	Annuities	18%
	Cryptocurrency (Since Q2 2018)	13%
	Art/antiques	11%
	I don't have any savings/investments	5%

A [recent report by PWC Global](#) on how much manufacturing businesses embrace and incorporate innovations in technology, found that companies in the Asia-Pacific region scored higher than their counterparts elsewhere in the world across the board - from drones to 3-D printing. We see this reflected in the consumer base, too: 72% of all Early Adopters can be found in the Asia-Pacific region (Index 1.21).

Compare this to respondents in Europe, who are **52% less likely to be categorized as Early Adopters compared to the average internet user**. In the past half a decade, Asia-Pacific has been able to leapfrog North America as the digital champion. Countries in the Asia-Pacific region have been known traditionally for high-tech manufacturing and exports, but their edge extends into the consumer realm as well. Across a range of metrics, consumers in the region stand out for their willingness and interest in adopting new technologies. For more information, see [our APAC Region Report](#).

TREND IN ACTION

The pace of the fourth industrial revolution will wait for no one



Europe's tech ecosystem has the talent and velocity to produce companies of comparable scale to the Facebooks and Ubers of the world. And yet, many of the continent's best efforts keep flaming out or selling out early. [In a recent article](#), Nicolas Colin argues it's because of Europe's extremely fragmented market. Unlike in the U.S. and China, it is nearly impossible for European entrepreneurs to target a large market at an early stage. Instead, they launch in their home country, secure a dominant position locally, and only then raise more funds. This means having to start over in order to expand to neighboring countries.



Question: What kind of savings/investments do you have? **Source:** GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Profiling Early Adopters

● Top 5 Countries ● Bottom 5 Countries

- IDX**
- 1.45** China
 - 1.34** India
 - 1.27** Vietnam
 - 1.20** UAE
 - 1.14** Saudi Arabia
 - 0.37** Netherlands
 - 0.36** France
 - 0.31** Sweden
 - 0.18** Russia
 - 0.16** Japan

World Regions



BRIC (Brazil, Russia, India and China) and the emerging markets over-index remarkably for Early Adopters. Today's emerging markets include India, Indonesia, Egypt and Argentina among others, and as a collective are 15% more likely to be Early Adopters. These emerging markets lie at the forefront of the latest technological developments, and these emerging-market innovations are attracting the attention of companies and providers in developed countries where costs are escalating. Often, developing countries can capitalize on technology more quickly than more advanced countries, enabling the adoption of new technologies that bypass legacy models or systems.

Economic Regions

		IDX
BRIC	66%	1.27
Emerging markets	83%	1.15
G20	89%	1.02
ASEAN	9%	0.88
EU5	5%	0.55
G8	13%	0.53



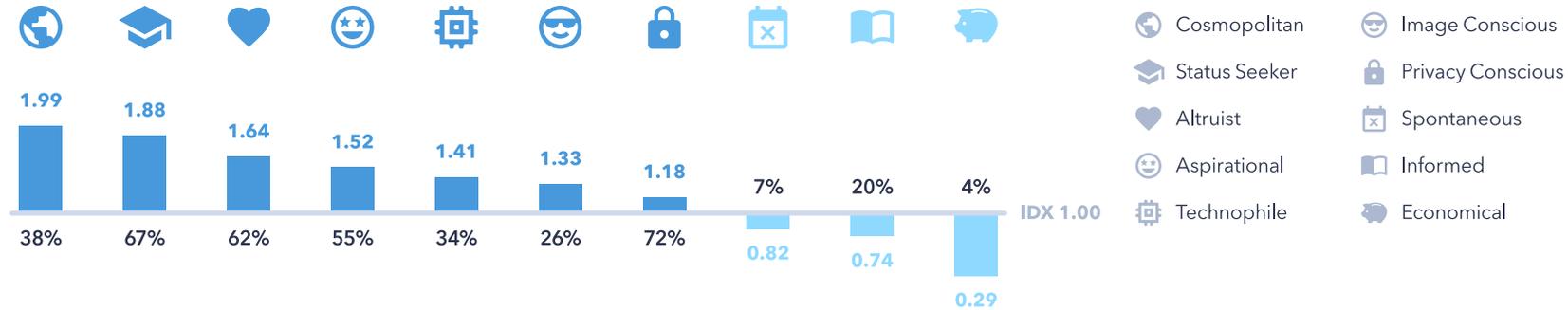
Question: World regions (this data is auto-generated based on country) // Economic regions (this data is auto-generated based on country)
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Early Adopters of Technology

Attitudes and Lifestyle

Attitudes and Lifestyle

Attitudinal Segmentation



Our research segments internet users based on their attitudinal responses in our survey. We assign respondents to various groups based upon attitudes ranging from worldviews, privacy concerns and brand engagement traits to new technology and purchasing preferences.

We have found a **relatively high prevalence of status seekers among Early Adopters:**

respondents who consider themselves much more affluent than the average person (60%, Index 1.60), tend to buy the premium version of a product (78%, Index 1.61) and are generally very brand conscious (74%, Index 1.56). Affluence is a practical prerequisite to be an early mover of technologies, which generally drop in price over time, but there's a particular mindset that's equally important to understand.

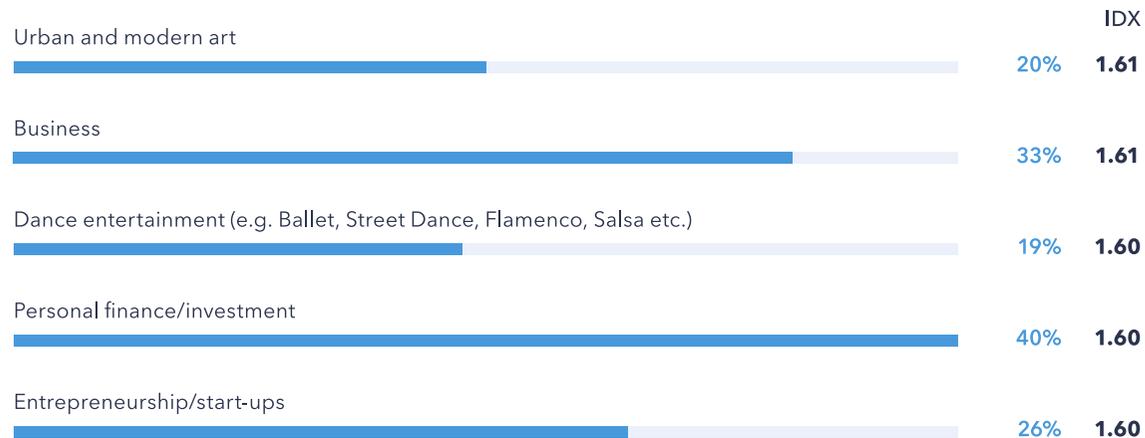
Early Adopters are almost twice as likely to fall into the *cosmopolitan* segment, too, meaning they are interested in travel and exploring new cultures and ideas. That only 4% fall into the economical category – those who seek value above all else in their purchases – shows that **this audience typically prioritizes brand status over price-savviness.**



Question: This data is auto-generated based on responses to the Attitudinal Statements
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Attitudes and Lifestyle

Highest indexing personal interests



Given the assets which Early Adopters possess, it is unsurprising to find business, personal finance/investment and entrepreneurship in the top five highest indexing personal interests. It is perhaps more surprising that this group are 1.6x more likely to cite urban/modern art and dance entertainment in their top interests, but

this specifically reflects their relative youth, cosmopolitan tastes, and openness. Perhaps surprisingly, this isn't an audience that is overly tech-obsessed; **only 1 in 3 Early Adopters are classified as technophiles.** Rather, this is an audience who have the means to buy new tech and the inclination to try new things - with tech or otherwise.

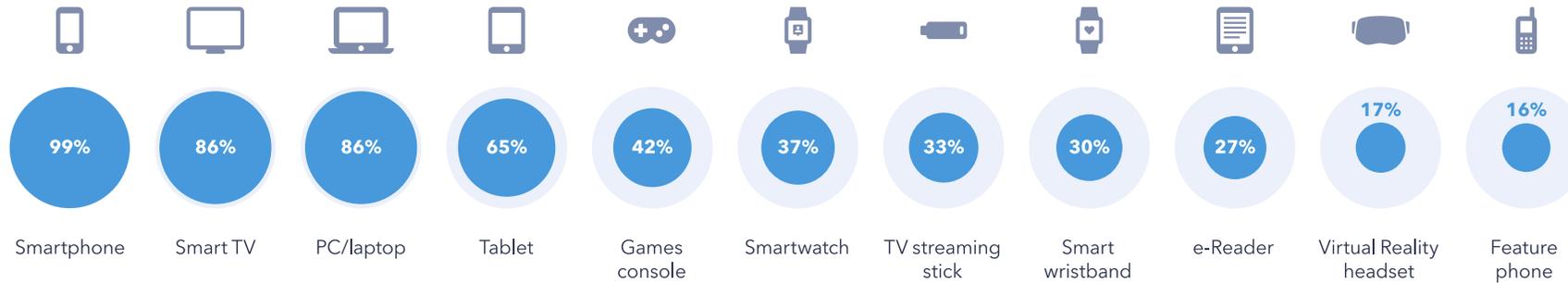


Question: Here is a list of topics that may interest you. Can you please indicate which of these you are strongly interested in?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

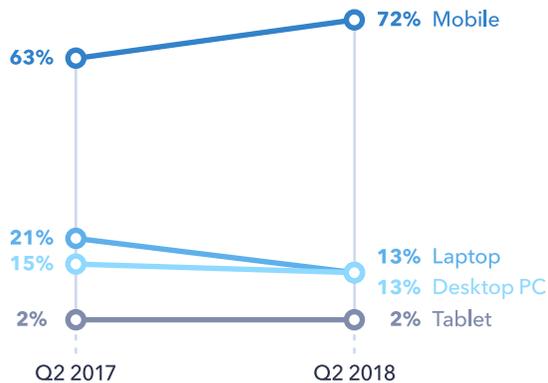
Early Adopters of Technology Devices

Devices

Device Ownership

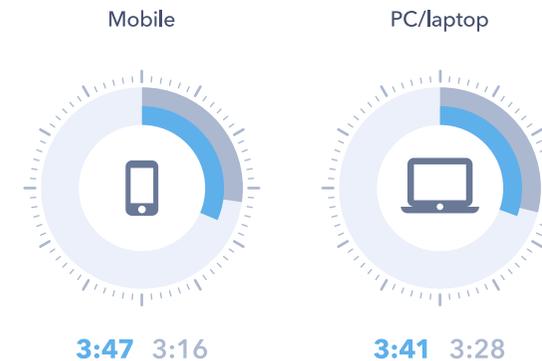


Device Importance Over Time



At a slightly faster rate than the global online population, we're seeing a fairly steep decline in the importance of laptops compared to mobiles. **Since Q2 2017, mobiles have risen in importance (from 62% to 72%) for Early Adopters, whereas those saying that laptops are their most important device has decreased from 21% to 13%.** While there is limited movement in laptop ownership, usage for this device is slipping. Early Adopters seem to be relying upon laptops less and viewing them as less integral for their everyday digital needs.

Time spent on (hrs:mm)

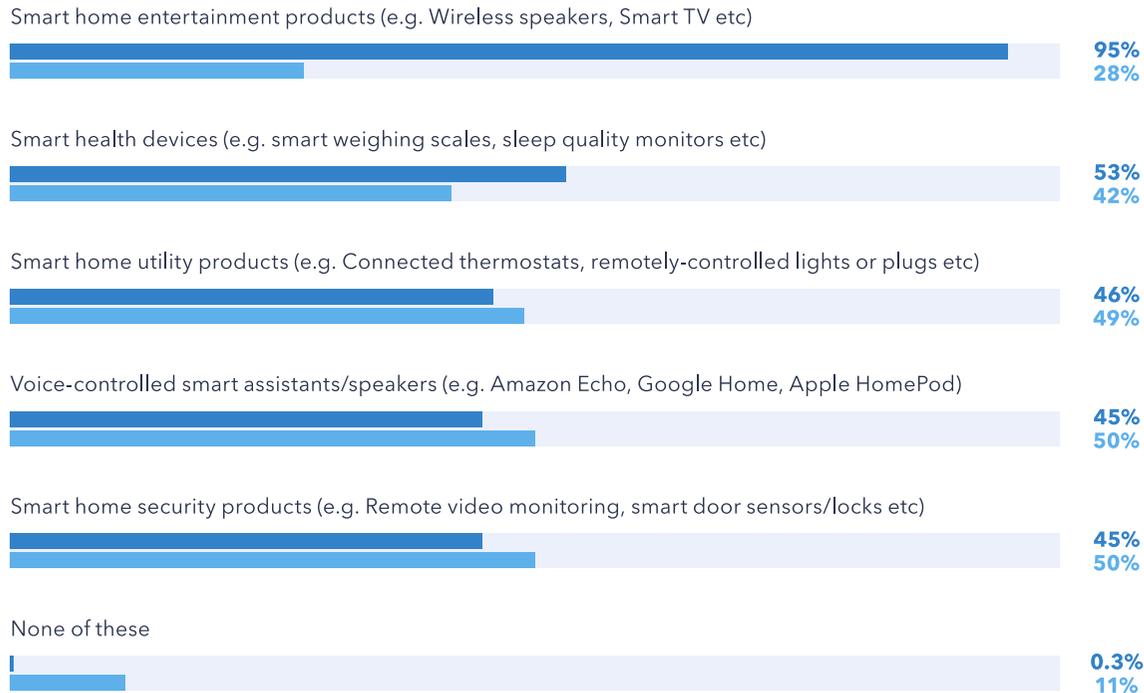


Question: Which of the following devices do you own? // Which of these would you say is the most important device you use to access the internet, whether at home or elsewhere?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Devices

Smart Home Devices: Current Ownership vs Planning to Purchase

● Currently Own ● Planning to Purchase



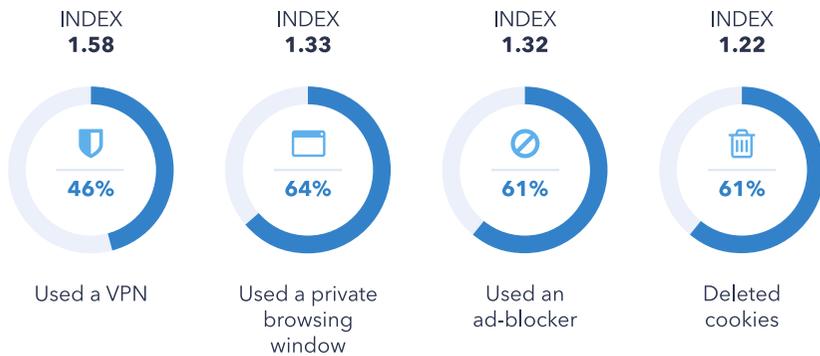
Out of the different smart home products that we currently survey, smart entertainment products (wireless speakers, smart TVs) are almost universally owned by this group. Approximately 1 in 2 of Early Adopters also own smart health devices, utility products, voice-controlled assistants or home security products. While these figures are probably inflated because our definition of Early Adopters includes the ownership of certain devices, the relative ranking of smart home products holds valuable information. For example, smart home security products come last in current ownership, but score highest for purchase intention, with half of all Early Adopters saying they are intending to purchase a smart security product for their home in the next 6 months.



Question: Which of these products do you currently use at home? And which are you or your household planning to purchase in the next 6 months?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Devices

Early Adopters' Ad-Blocking Behaviors



Motivations for Ad-Blocking

There are too many ads on the internet	29%	1.29
Too many ads are annoying or irrelevant	27%	1.22
Ads are too intrusive	27%	1.30
Ads sometimes contain viruses or bugs	26%	1.44
Ads take up too much screen space	24%	1.40

Cyber Security

Privacy and cybersecurity have been increasing concerns with many consumer groups for the past couple of years, fueled by recurring hacking incidents and data breach news. These concerns are very present with the Early Adopter group, **72% of whom qualify as privacy conscious**. Not only do they value privacy and worry about loss of personal data, they're also more likely to take active measures to protect their online privacy. 46% of Early Adopters have used a virtual private network (VPN) in the past month (Index 1.58) and 61% have used an ad-blocker (Index 1.32).

This pattern of privacy-cautious behavior makes sense given that many of the new technologies they've adopted are relatively more susceptible to security breaches or malware. Early Adopters are 65% more likely than the average internet user to cite privacy as a reason to use an adblocker, and 44% more likely to use them because ads might contain viruses or bugs. Using ad-blocking to stop ads being personalized based on their browsing history was the least common reason cited by this group, indicating that Early Adopters are more accepting of tailored advertising content than they are of excessive numbers of ads.



Question: Which of the following have you done in the last month? // What are your main reasons for blocking ads while you use the internet?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Devices

Mobile Brands

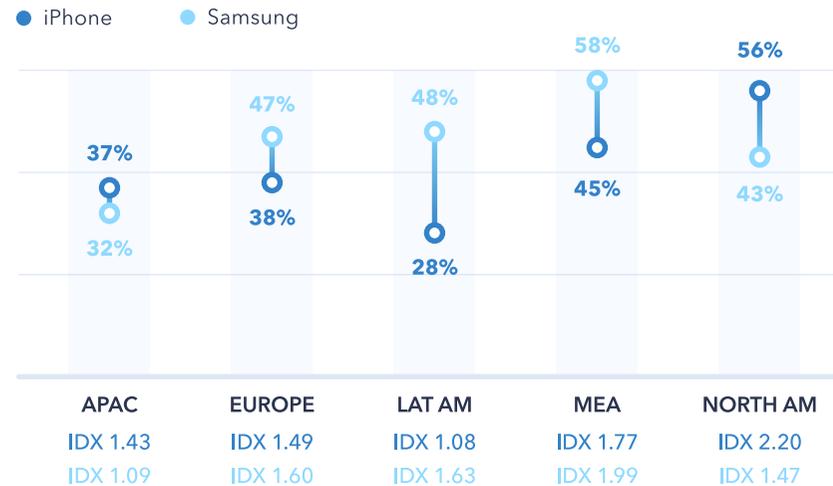
Early Adopters have much shorter replacement cycles for mobile phones than the average internet user. 44% are planning to purchase a new mobile phone within the next 6 months, compared to just 29% of the global average. A quarter of Early Adopters have owned their current phone for less than 6 months. This has an impact beyond the initial choice of device; it means Early Adopters are more likely to use technology which requires the most recent mobile operating systems, like mobile payments.

Choice for upgrade

Within the next 6 months	44%	1.54
In 6 to 12 months	36%	1.13
In 12 to 18 months	13%	0.75
In 18 to 24 months	4%	0.52
After 24 months	4%	0.24

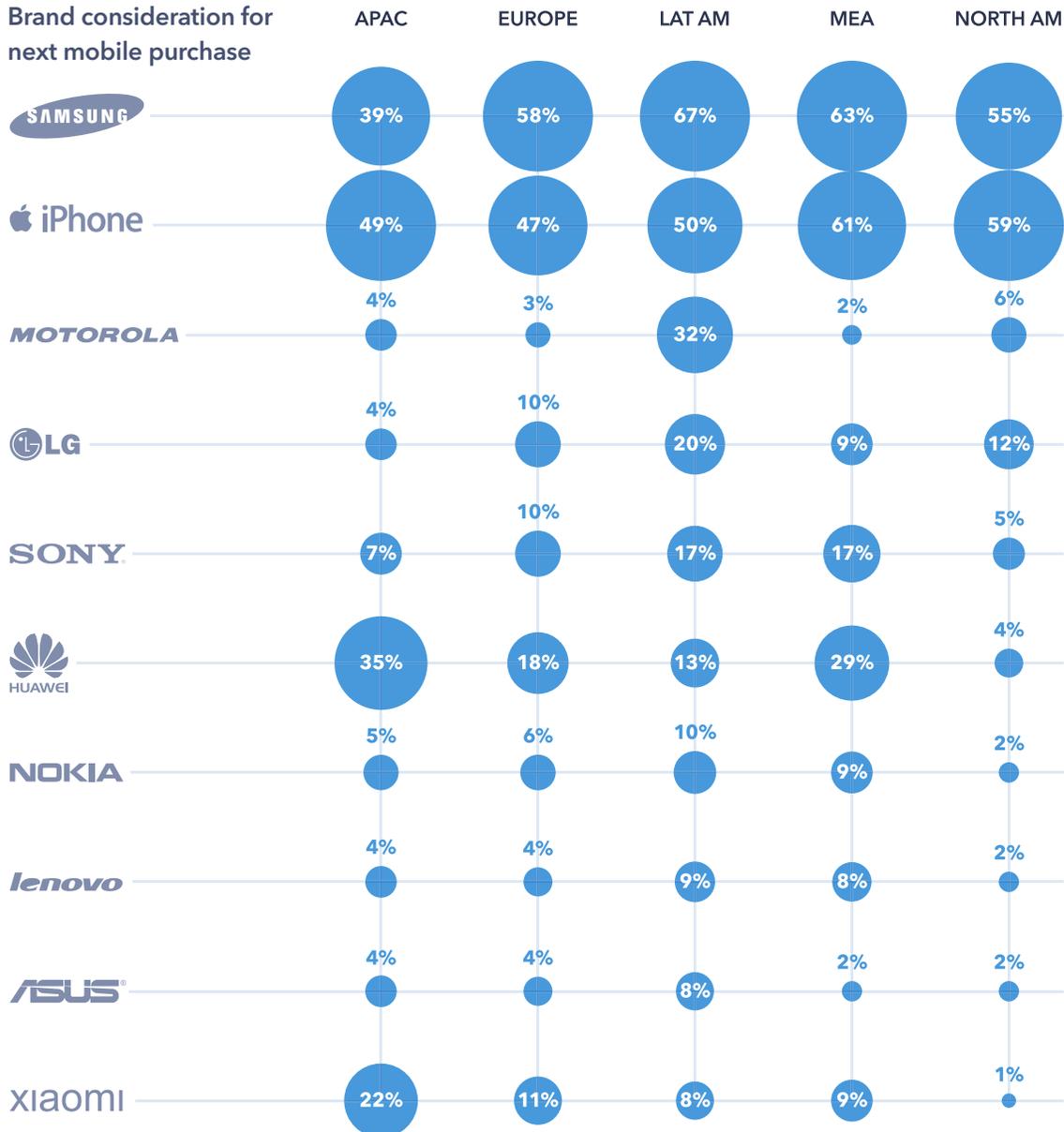
44% are planning to purchase a new mobile phone within the next 6 months, compared to just 29% of the global average.

Samsung vs iPhone by region



Question: When do you plan to buy a new mobile phone or upgrade your existing phone? // Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Devices



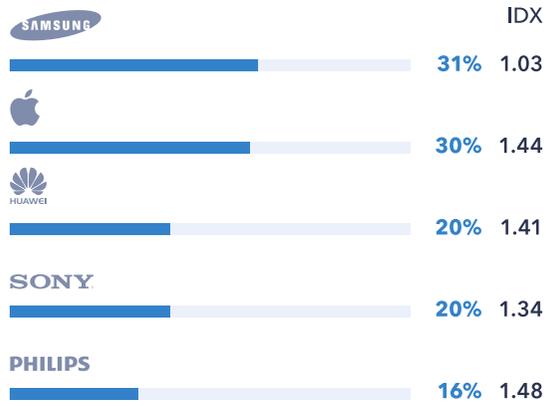
For Early Adopters, iPhone sits at the top of the table for both current mobile ownership and consideration for a consumer's next upgrade or purchase. 1 in 2 Early Adopters chose iPhone as their top choice for their next upgrade, at a 1.3 times higher rate than the average internet user. Overall though, 45% would upgrade to a newer Samsung model. Samsung holds the advantage over iPhone in Europe, Latin America and MEA markets. Huawei occupies a decent third place in APAC, Europe and MEA, with 13-27% Early Adopters in these markets owning a phone from the Chinese brand. Motorola and LG report similar figures in Latin America, showing that the **mobile phone market is more than just a two-horse race.**



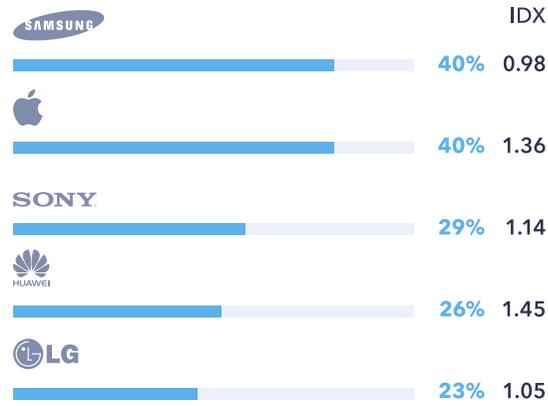
Question: Which brand(s) would be your top choice when you next upgrade or buy a new mobile phone?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Devices

Top 5 brands for advocacy



Choice for next technological purchase



Tech Brands

Because so many new forms of consumer tech are planned for home use – which this early adopter audience have already begun to incorporate – it is particularly important to consider a broader range of technology brands than the typical range of social media and mobile giants that normally come up.



Question: Which brand(s) would be your top choice when you next buy an electrical item (e.g. home appliance, TV, laptop)? // Which of these brands would you advocate to others (e.g. write/post positive reviews about, recommend to family/friends)?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Devices

The German conglomerate Siemens does particularly well among a basket of global technological brands, across a range of parameters including engagement, consideration and advocacy rates. Early Adopters are 1.75 times more likely than the average online consumer to use a Siemens product, 1.56 times more likely to consider Siemens for their next purchase of an electrical item, and **1.82 times more likely to advocate for Siemens.**

When the 171-year-old industrial group spent \$3.5 billion in 2007 on buying the software company UGS, not many understood what Siemens were trying to accomplish. More than a decade later, however, the purchase is seen as the conglomerate's first major step towards integrating the worlds of hardware and software for "the Industrialized Internet of Things". Siemens has since spent another \$10 billion to acquire roughly 20 software companies, fitting them into a division called Digital Factory which earlier this year **accounted for 16% of Siemens' total revenue and 30% of industrial profits.**

SIEMENS



Siemens has early adopters in mind

SIEMENS

Ingenuity for life

Siemens recently launched its Additive Manufacturing Network, an online collaborative platform for early adopters which looks to reduce the overall adoption risk of additive manufacturing and create new business opportunities for all members of the global manufacturing community. The network offers the additive manufacturing a place to co-create, co-innovate and come up with completely new business models.



Question: Which of these technology brands do you currently use products or services from? **Source:** GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Early Adopters of Technology
Social Media

Social Media

12.85 Average number of social media accounts (global average - 8.69)

2:53 Time spent on social media (global average - 2:20)

1:31 Time spent on games consoles (global average - 0:59)

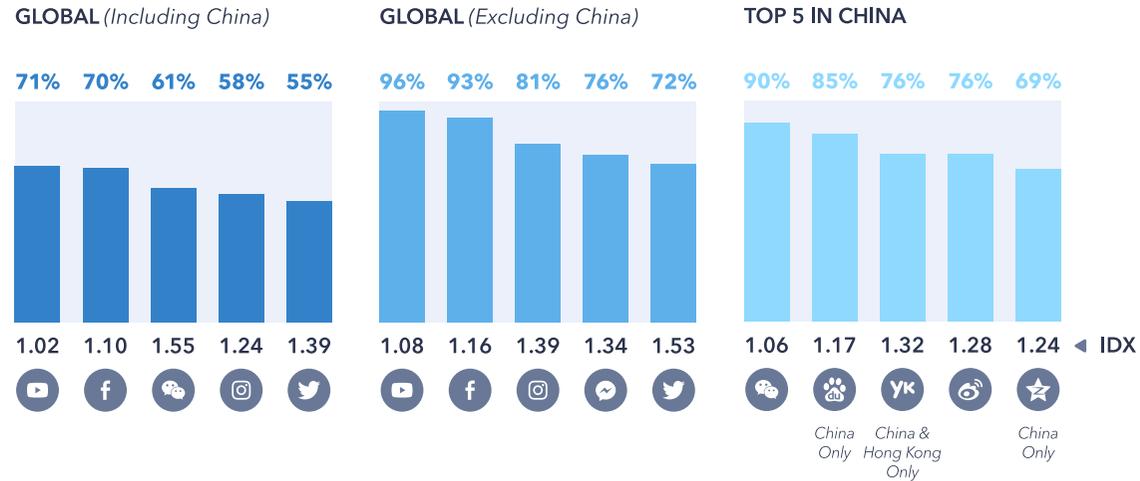
1:46 Time spent on music streaming services (global average - 1:13)

Early Adopters have four more social media accounts than the average internet user. That they occupy such a wide social portfolio suggests a differentiated approach to social media, where different networks are used for distinct purposes. As such, targeting Early Adopters on social networks should be sensitive to how they choose to engage with a particular service.

Early Adopters average nearly 3 hours on social media every day

Outside of China, Facebook dominates membership stats for social media, with

Top social networks for visitation/use



94% of Early Adopters having signed up to the network and 93% having visited in the past month. However, YouTube leads in site visits: an impressive 96% of Early Adopters visited the site in the past months. With such a large percentage of Early Adopters visiting YouTube, as well as their love for cinema and film, video content is an effective targeting strategy for reaching this group.

Including China, **Early Adopters are twice as likely to use Twitch, Tumblr and LinkedIn at least once a day.** This demonstrates that this group do not use social media for one

specific platform or one particular reason; their top reasons for using social media is 'to stay up-to-date with news and current events', followed by 'to stay in touch with what their friends are doing' and 'to find funny and entertaining content'. These reasons are all causal, which indicates this group know what they want from specific platforms and use them accordingly. Other non-causal reasons, such as 'to fill up spare time' and 'because a lot of my friends are on them' come much further down in explaining their social media use.



Question: Which of the following sites/applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Social Media

Top 5 following on social media

Brands you like	55%
People you know in real life	53%
Actors	45%
News/media organizations	42%
Contacts relevant to your work	40%

Top 5 over-indexes

	IDX
TV Presenters	1.84
Entrepreneurs/business people	1.81
Charities/good causes	1.69
Journalists	1.69
Sports stars	1.67

A third (32%) of Early Adopters use social media to follow sports events, which is 65% more likely than the average internet user. With Twitch being the highest indexing social platform in terms of frequency, this group will be a key target audience for esports. The potential for positive brand equity is huge in this space. Brands should be attentive to the size, scope and dedication of the gaming and esports audiences, who are disproportionately more likely to be early adopters. This matters for ad targeting on the platform level, but also

more widely in terms of how we think of the audiences themselves.

55% of Early Adopters follow brands they like (Index 1.43) and 39% follow brands they are thinking of buying from (Index 1.52), which illustrates their happiness to engage with brands on social media. This figure is consistent for this group across all regions, with Latin America (60%) being particularly keen to follow brands they like on social media, followed by APAC (55%).

Contacts relevant to your work just makes the top 5 (40%), although this varies by region. Nearly 1 in 2 people in MEA (49%, Index 1.75) and Latin America (45%, Index 1.61) use social media to follow people relevant from work, but this figure drops to under a third of people in North America (30%, Index 1.09). Despite these regional differences, it is clear that social media is frequently used as an accessory of this group's professional life.



Question: Who do you follow on social media?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Social Media

Reasons for using social media

		IDX
To promote/support charitable causes	23%	1.83
To share details of what I'm doing in my daily life	33%	1.66
To watch/follow sports events	32%	1.65
To network for work	39%	1.62
To follow celebrities/celebrity news	30%	1.60
To share my opinion	43%	1.47
To make sure I don't miss out on anything	32%	1.46
To meet new people	40%	1.45
To research/find products to buy	42%	1.41
To share photos or videos with others	42%	1.30

In China, WeChat dominates the social media landscape as 92% are members and 91% have visited the platform in the past month. Baidu Tieba (85%), Youku (76%) and Sina Weibo (76%) report high visitation rates, to the extent that they exceed membership on those platforms.

A strong over-index for following entrepreneurs and business people reveals this audience's professional social media engagement with their interest in finance.

TREND IN ACTION

Twitch plots expansion beyond game streaming



Research firm Newzoo predicts the esports market will grow 55% (to \$1.4 billion) by 2020, as Facebook and other media companies such as 21st Century Fox enter the market. With esports becoming more and more mainstream, Twitch, the amazon-owned video streaming service, is having to expand beyond game streaming. It has been partnering with traditional sports leagues such as the NBA and NFL, and the company is growing its arsenal of streamers and producers dedicated to broadcasting content outside of the traditional gaming sphere. Part of that emphasis involves encouraging streamers and audiences to engage with one another, creating a community-based model and building an economy that helps streamers build and sustain their own businesses.



Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

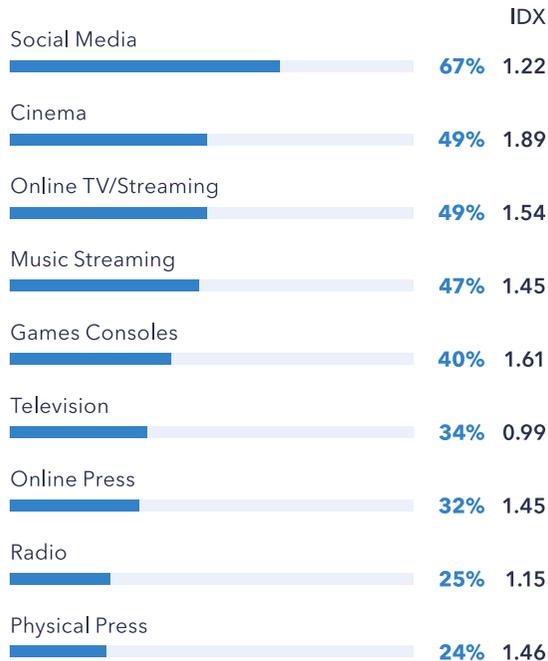
Early Adopters of Technology

Entertainment

Entertainment

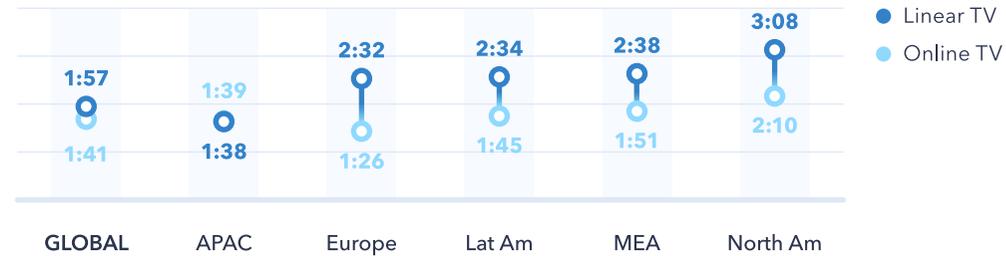
Media consumption segmentation

% of Early Adopters who are high/heavy users of the following



While Early Adopters are 1.46 times more likely to be high or heavy users of physical press – where luxury marketing spend is traditionally focused – it comes at the bottom of our media consumption segmentation. The top spot for social networks is even more pronounced in Latin America (83%) and MEA (78%), showing

TV consumption by region



Weekly TV engagement

% of Early Adopters who watch the following types of TV on a weekly basis

TV Type	% of Early Adopters	IDX	Top device
Watch subscription services such as Netflix	86%	1.49	MOBILE
Watch a TV channel's catch-up/on-demand service	88%	1.40	TV
Watch television live as it is broadcast on a TV channel	94%	1.14	TV

where, for sheer time spent at least, Early Adopters are focusing most of their attention.

Strikingly, this group are 89% more likely to be high or heavy users of the cinema, and nearly 6 in 10 say they are strongly interested in film. MEA does not contribute

to this, as cinemas in that region are scarce and subject to strict controls in some countries; the popular cinema markets for this audience are mainly in APAC (51%) and Latin America (52%). The relatively high cost barrier for cinema could explain why it is disproportionately popular with this audience.



Question: This data is auto-generated based on responses to the Time Spent questions (heavy/high users)
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Entertainment

Second-Screening

This is a content-crazy group: **Early Adopters are devoting over four hours to television (combining broadcast and online) per day.** Linear TV has actually overtaken broadcast TV in APAC, which we seldom see. North America takes top spot for daily TV consumed in both linear form (03:08 per day) and online TV (02:10 per day).

Early Adopters are connected across multiple screens for a large portion of the day, and they are second-screening by default. **Over 95% of Early Adopters say they used another device the last time they watched TV.**

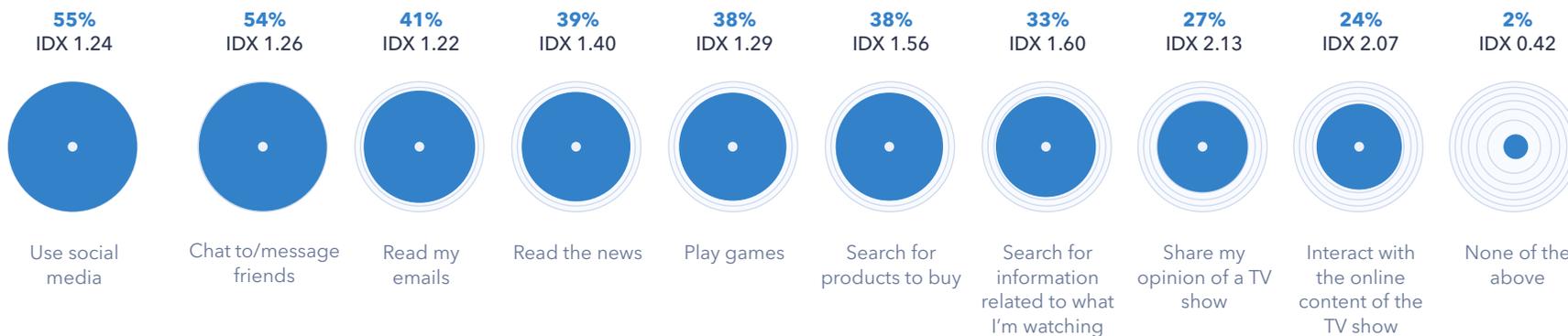
The activities that are most likely to draw Early Adopters' attention are social media and messaging friends, highlighting the centrality of social media in their online lives.

What is perhaps more telling is that Early Adopters are over 50% more likely to search for products to buy and search for information related to what they're watching. Moreover, they are more than twice as likely to interact with the online content of the TV show and share their opinion of a TV show while dual-screening. This shows that for a large proportion of this group, intentional behaviors are motivating their second-screening, increasing the potential for cross-screen engagement and its success.

Early Adopters are over 50% more likely to search for products to buy and search for information related to what they're watching.

Second screening activities

% of Early Adopters who say they do the following when they dual-screen



Source: GlobalWebIndex Q2 2018 Base: 111,899 Internet Users Aged 16-64

Early Adopters of Technology

Commerce and Brand Engagement

Commerce and Brand Engagement

Discovery

Search has reached parity with TV as the most-cited source of brand discovery. 40% of Early Adopters find out about brands through search engines, compared to 39% who do so through ads seen on TV. Despite their greater tendency to ad-block, **35% still say they are discovering brands through online ads**, and can still be used judiciously to target this audience. Early Adopters are also 1.38 times more likely than the typical online consumer to discover brands via brand/product websites.

Differences exist for brand discovery on a regional level. Word-of-mouth recommendations overperform in Europe, coming in as the second most popular source for discovering brands. Ads seen online are a consistent source of information across all regions, but it does particularly well in Latin America, MEA and North America. In APAC, for example, ads seen online is only the sixth most popular source, behind TV shows/films, brand/product websites and word-of-mouth recommendations. **Internet penetration, especially in the social space, is key to understanding emerging markets and their affluent Early Adopters; all regions - bar Europe - are between thirty and sixty percent more likely to use recommendations and comments on social media than the average online consumer.**

Brand Discovery

% who say that they find brands via the following channels

 Search engines	40%
 Ads seen on TV	39%
 Ads seen online	35%
 Brand/product websites	35%
 TV shows/films	34%

Top 3 over-indexes

	IDX
 Deals on group-buying websites (e.g. Groupon)	1.85
 Endorsements by celebrities	1.69
 Personalized purchase recommendations on websites	1.69



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:** 111,899 Internet Users Aged 16-64

Commerce and Brand Engagement

Research

Once Early Adopters have discovered a brand, they tend to stick to search engines to find out more about them. Nevertheless, they're also 20% more likely than the average online consumer to use social networks for product research.

This puts social networks ahead of more established channels of research, such as consumer reviews (41%, Index 1.13). Within social, their preference for visual platforms like Pinterest and Instagram informs their product research habits: online pinboards (Index 1.91), microblogs (Index 1.89) and vlogs (Index 1.61) all significantly over-index, and are key to this audience.

Product Research

% of Early Adopters who say that they research products/services via the following routes

 Search engines	46%
 Social networks	45%
 Consumer reviews	41%
 Product/brand sites	38%
 Mobile apps	37%

Top 3 over-indexes

	IDX
 Online pinboards (e.g. Pinterest)	1.91
 Micro-blogs (e.g. Twitter)	1.89
 Messaging/live chat services	1.75



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:** 111,899 Internet Users Aged 16-64

Commerce and Brand Engagement

Brand Interactions

Early Adopters are much more likely than the average internet consumer to share brand's posts on social media, as well as engage with brands and their content and offer up their own content. Engaging with brands is central to how and why this audience uses the internet, and building a powerful owned presence is crucial to reaching them. Increasing interactive content to engage this group, as well as having a space where they can give feedback, suggestions and ideas, are key here.

Early Adopters like to feel personally involved with brands; many want to have a direct say in the products that are made for them and advertised to them.

Top 5 brand interactions

% of Early Adopters who have interacted with a brand in the following ways in the last month

	Visited a brand's website	62%
	Watched a video made by a brand	33%
	Liked/followed a brand on a social network	30%
	Visited a brand's social network page	30%
	Read an email/newsletter from a brand	28%

Top 3 over-indexes

	IDX
	Uploaded a photo/video to a brand's social network page 2.04
	Shared a brand's post on a social network 2.03
	Provided ideas for a new product/design 2.01



Question: Which of the following actions have you done online in the past month?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Commerce and Brand Engagement

Purchase

Fittingly for such a socially engaged group, they over-index highest for being motivated by the chance to purchase within the social media interface (21%, Index 1.94). This represents fertile grounds for both brands and their social partners to provide an engaging purchase portals that are integrated into a frictionless omnichannel strategy.

It should be noted that social commerce is less effective as a purchase driver in Europe and North America; it's in APAC (23%) and MEA (24%) where consumers are over twice as likely say that a 'buy' button on a social network would most increase their likelihood of buying a product.

Otherwise, Early Adopters value the same factors as other consumers: 54% (Index 0.93) cite free delivery and 40% (Index 1.16) cite "easy returns policy" as the main factors that will motivate them to complete an online purchase.

Online purchase drivers

% of Early Adopters who say the following would motivate them to complete a purchase

 Free delivery	54%
 Coupons and discounts	45%
 Easy returns policy	40%
 Reviews from other customers	38%
 Loyalty points	37%

Top 3 over-indexes

	IDX
 Option to use "buy" button on a social network	1.94
 Exclusive content or services	1.70
 Click & Collect delivery	1.65



Question: When shopping online, which of these features would most increase your likelihood of buying a product?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Commerce and Brand Engagement

Advocacy

For Early Adopters, high quality products (54%) and love for the brand (43%) are most likely to encourage brand advocacy. However, compared to the global online population, Early Adopters are 77% more likely to promote a brand online if it will enhance their online reputation, 61% more likely if they have access to exclusive content or services, and 46% more likely if they have a one-on-one relationship with a brand. This group looks for a tailored relationship with a brand, where they receive personalized or unique products and services. These are traits they share with other high-income groups.

Brand advocacy motivations

% of Early Adopters who would advocate a brand for the following reasons

 **54%** **IDX 1.11**
High-quality products

 **43%** **IDX 1.30**
Love for the brand

 **41%** **IDX 0.93**
Rewards (e.g. discounts, free gifts, etc)

 **38%** **IDX 1.16**
When something is relevant to my interests

 **37%** **IDX 1.15**
When I've received great customer service

 **30%** **IDX 1.43**
The feeling of taking part/being involved

 **28%** **IDX 1.50**
Having insider knowledge about the brand/products

 **28%** **IDX 1.36**
When something is relevant to my friends' interests

 **27%** **IDX 1.61**
Access to exclusive content or services

 **25%** **IDX 1.46**
When I have a one-on-one relationship with a brand

 **24%** **IDX 1.77**
When something enhances my online reputation/status



Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

Commerce and Brand Engagement

Advocacy

This is evident in what they want their favorite brands to do and provide. The most popular thing a brand can do for them is to provide innovative new products (28%) and improve their knowledge and skills (25%), but this group are unusually interested in having a brand connect them with other fans of the same brand (Index 1.47).

They're also much more likely to like when brands let them contribute ideas for new products and designs (Index 1.37), and when they are given the opportunity to customize products (1.25). Allowing this group to be involved in a wide spread of a brand's activities, at any stage of a product's development, will help create passionate market influencers.

Early Adopters' top 5 things they want their favourite brands to do/provide

	Provide innovative new products	28%
	Improve your knowledge and skills	25%
	Produce eco-friendly products	23%
	Make you feel like a valued customer	22%
	Keep you up-to-date with news and products	20%

Top 3 over-indexes

	IDX	
	Connect you with other fans of the brand	1.47
	Let you contribute ideas for new products/designs	1.37
	Give you the chance to personalize products	1.25



Question: Which of these things do you most want your favorite brands to do/provide?
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 Internet Users Aged 16-64

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 40 countries, with a global sample of 111,899 respondents). Among this sample, there were 12,519 respondents from 40 countries.

	Early Adopters	TOTAL		Early Adopters	TOTAL
Argentina	1559	123	Netherlands	1279	50
Australia	2282	161	New Zealand	1275	61
Austria	1280	77	Philippines	1577	147
Belgium	1266	55	Poland	1816	153
Brazil	2345	263	Portugal	1284	99
Canada	2268	139	Russia	2279	58
China	15361	3571	Saudi Arabia	1487	139
Colombia	1301	164	Singapore	2496	240
Denmark	1334	68	South Africa	1528	106
Egypt	1771	189	South Korea	1270	99
France	3323	157	Spain	2784	295
Germany	2846	167	Sweden	1274	45
Hong Kong	1766	188	Switzerland	1261	60
India	4138	877	Taiwan	1796	126
Indonesia	1788	146	Thailand	1538	198
Ireland	1247	74	Turkey	1577	153
Italy	2807	245	UAE	1768	281
Japan	1804	38	UK	7709	778
Malaysia	1556	128	USA	15637	2019
Mexico	2605	339	Vietnam	1618	243

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

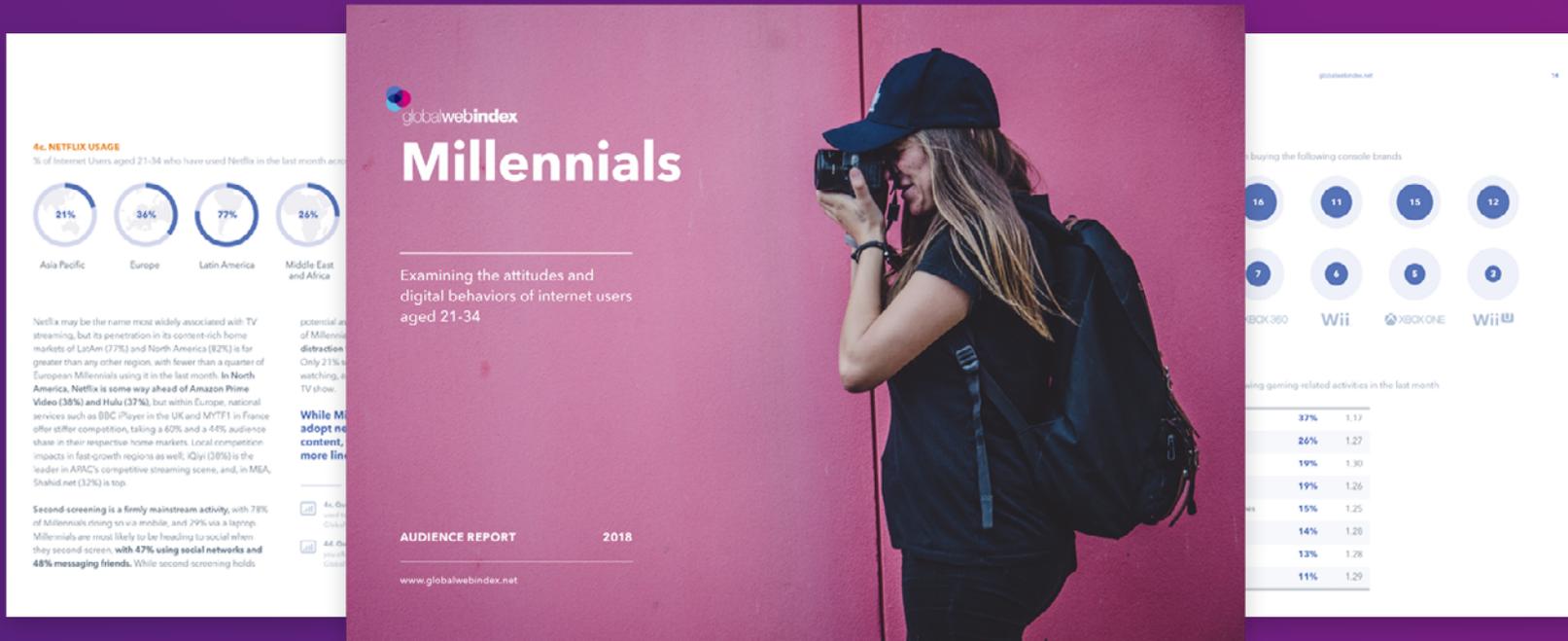
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

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

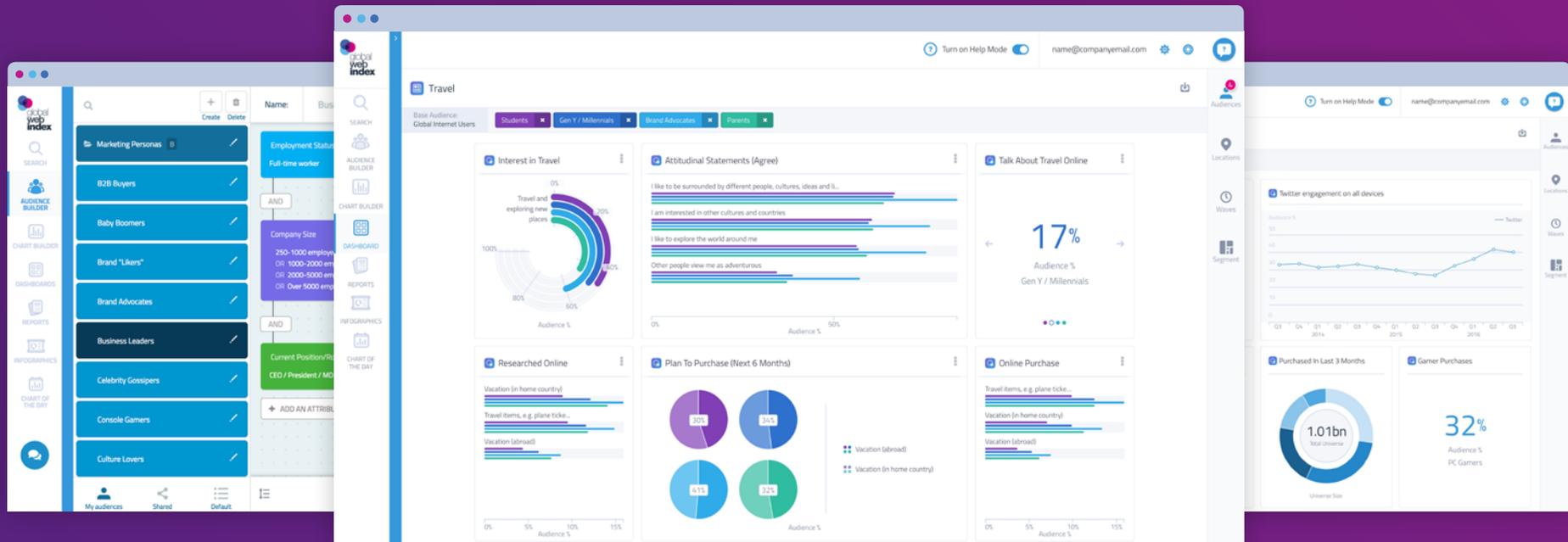
Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
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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