Consumer Barometer

Country Report – France
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What is the Consumer Barometer?

The Consumer Barometer 2015 is a tool to help you understand how people use the internet.
Executive Summary

The Top 3 Trends that define France
The 3 Trends in France

The future is **mobile**
8 out of 10 in France are online at least once a day. Especially consumers under 34 years old are online often.

**Today's shopper is an online shopper**
More than every second of all sales – online or offline – are driven by online research. 45% of all French consumers, who conducted online research used a search engine prior to a recent purchase.

Millions of **online video views**
5 out of 10 watch online video because they want to be entertained. 57% of the French consumers prefer watching videos shorter than 5 minutes.
The Online and Multiscreen World

Quantify and understand internet usage and attitudes across various devices.
Where are the consumers? **Online!**

8 out of 10 of the consumers are online at least once a day

Source: The Connected Consumer Survey 2015
Question: How often do people go online (for personal Internet usage)?
France is online

Especially consumers under 34 years old are online often

How often do you go online?

- Daily: 82%
- Weekly: 13%
- Monthly or less: 5%

Do you go online every day?

- Under 25: 93% Yes, 7% No
- 25-34: 93% Yes, 7% No
- 35-44: 89% Yes, 11% No
- 45-54: 72% Yes, 28% No
- Over 55: 72% Yes, 28% No

Source: The Connected Consumer Survey 2015
The consumers go online for **personal reasons** and to look for information.

80% use the internet for personal reasons

Consumers state that the internet is the first place they look for information.

83%
People are even online when they’re watching TV

The consumers are online while watching TV

Use devices to go online while watching TV

- 61%

Which devices do people use to go online while watching TV

- Computer: 51
- Smartphone: 49
- Tablet: 28

Source: The Connected Consumer Survey 2015
Question: Do people go online on their devices while watching TV?
France has more screens than ever

2,5 devices pr. person

There are 2,5 devices connected to the internet pr. person in France in 2015.

This is a 9% growth from 2013.

Source: The Connected Consumer Survey 2015
3 out of 5 have a smartphone

Which devices do people use?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet</td>
<td>32%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>62%</td>
</tr>
<tr>
<td>Computer</td>
<td>74%</td>
</tr>
</tbody>
</table>

Source: The Connected Consumer Survey 2015
The young French are mobile

Smartphone usage rate

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Usage Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>55 and over</td>
<td>31%</td>
</tr>
<tr>
<td>45-54 years</td>
<td>65%</td>
</tr>
<tr>
<td>35 - 44 years</td>
<td>80%</td>
</tr>
<tr>
<td>25 - 34 years</td>
<td>88%</td>
</tr>
<tr>
<td>Under 25 years</td>
<td>92%</td>
</tr>
</tbody>
</table>

Source: The Connected Consumer Survey 2015
### How do people use their smartphone?

**What online activities do people do on their smartphones at least weekly?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen to music</td>
<td>19%</td>
</tr>
<tr>
<td>Look up maps and directions</td>
<td>14%</td>
</tr>
<tr>
<td>Look for product information</td>
<td>19%</td>
</tr>
<tr>
<td>Purchase products / services</td>
<td>2%</td>
</tr>
<tr>
<td>Watch online videos</td>
<td>30%</td>
</tr>
<tr>
<td>Play games</td>
<td>13%</td>
</tr>
<tr>
<td>Check email</td>
<td>43%</td>
</tr>
<tr>
<td>Visit social networks</td>
<td>35%</td>
</tr>
<tr>
<td>Use search engines</td>
<td>47%</td>
</tr>
</tbody>
</table>

*Source: The Connected Consumer Survey 2015*
Search is mobile

5 out of 10 are using search engines via smartphones at least weekly

...making it crucial for businesses to think mobile.

Source: The Connected Consumer Survey 2015
The Smart Shopper

Focuses on the consumer purchase journey and the role of the Internet in making purchase decisions.
Many consumers prefer **online** research

Did people do any online or offline research prior to their recent purchase?

- Offline: 58%
- Online: 57%

19% are researching **online only**

Source: The Consumer Barometer Survey 2015
In which industries are consumers researching online?

- Car Insurances: 67%
- Cinema Tickets: 65%
- Clothing & Footwear: 41%
- Do it yourself: 47%
- Flight Tickets: 90%
- Groceries: 23%
- Ground Travels: 73%
- Hair Care: 28%
- Home appliances: 76%
- Home Furnishings: 55%

Source: The Consumer Barometer Survey 2015
Question: Did people do any online or offline research prior to their recent purchase?
In which industries are consumers researching online? (continued)

- Hotel Stays: 89%
- Laptops: 71%
- Make-up: 38%
- Mobile Phones: 71%
- Music: 64%
- Personal Loans: 61%
- Real Estate: 65%
- Restaurants: 43%
- Televisions: 67%
- Vitamins & OTC Remedies*: 46%

* Over-the-counter remedies
Source: The Consumer Barometer Survey 2015
Question: Did people do any online or offline research prior to their recent purchase?
How are people researching?

The consumers use the internet to compare choices prior to purchase

In which part(s) of the purchase process did people use the Internet?

- Looked for early inspiration: 32%
- Compared choices online: 51%
- Sought advice online: 37%
- Prepared for immediate purchase*: 33%

What online sources did people use to make a purchase decision?

- Brand websites: 24%
- Retailer websites: 18%
- Search Engine: 45%

Source: The Consumer Barometer Survey 2015
*found where to buy/found location/made contact
Online advertising and research is essential

For 60% of the consumers online is the first source of product awareness during pre-purchase research.

What specific source informed people who first learned of their purchased product via product research?

Source: The Consumer Barometer Survey 2015
Research leading to a purchase

Search engines are essential in the purchase decision

<table>
<thead>
<tr>
<th>Source: The Consumer Barometer Survey 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search engine</strong></td>
</tr>
<tr>
<td><strong>Retailer websites</strong></td>
</tr>
<tr>
<td><strong>Brand websites</strong></td>
</tr>
<tr>
<td><strong>Advice sites</strong></td>
</tr>
<tr>
<td><strong>Online video sites</strong></td>
</tr>
<tr>
<td><strong>Price comparison sites</strong></td>
</tr>
<tr>
<td><strong>Social networks</strong></td>
</tr>
</tbody>
</table>
Smartphones and product research

Which devices did people use for product research? (Smartphone)

- **Under 25 years**: 30%
- **25-34 years**: 18%
- **35-44 years**: 9%
- **45-54 years**: 4%
- **55 and over**: 2%

Source: The Consumer Barometer Survey 2015
Smartphone users are online users

Smartphone users are more likely to purchase or research products online

How many people research or purchase online?

64% Smartphone Users

54% Smartphone Non-Users
How are smartphones used for online research?

In which part(s) of the purchase process did people use a smartphone?

- Looked for early inspiration: 41%
- Compared choices online: 23%
- Sought advice online: 33%
- Prepared for immediate purchase: 21%

Source: The Consumer Barometer Survey 2015
People are **going mobile**, but some **issues** occur

38% are experiencing **issues** when accessing websites via their smartphone

And 20% find another website that works better on smartphone

Source: The Consumer Barometer Survey 2015
Many prefer online shopping

Where did people make their purchase?

- 38% Online*
- 62% Offline/other

Source: The Consumer Barometer Survey 2015
*Online/Email
The Online Customer Journey

Online research

57%

Online purchase

28%

Offline purchase

29%

Source: The Consumer Barometer Survey 2015
Question: Did people do any online or offline research prior to their recent purchase?
Consumer behavior in different ages

Research online
Purchase online

Research online
Purchase offline

Under 25 29% 38% 38%
25-34 years 29% 31% 31%
35-44 years 29% 27% 27%
45-54 years 29% 25% 25%
Over 55 years 30% 23% 23%

Source: The Consumer Barometer Survey 2015
Question: Did people research or purchase their product online or offline?
Consumer behavior in various industries

Source: The Consumer Barometer Survey 2015
Question: Did people research or purchase their product online or offline?

<table>
<thead>
<tr>
<th>Industry</th>
<th>Research online, purchase online</th>
<th>Research online, purchase offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car Insurance</td>
<td>47%</td>
<td>20%</td>
</tr>
<tr>
<td>Cinema Tickets</td>
<td>50%</td>
<td>15%</td>
</tr>
<tr>
<td>Clothing &amp; Footwear</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Do It Yourself</td>
<td>31%</td>
<td>17%</td>
</tr>
<tr>
<td>Flights (Leisure)</td>
<td>73%</td>
<td>17%</td>
</tr>
<tr>
<td>Groceries</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Ground Travel</td>
<td>59%</td>
<td>14%</td>
</tr>
<tr>
<td>Hair Care</td>
<td>10%</td>
<td>18%</td>
</tr>
<tr>
<td>Home Appliances</td>
<td>36%</td>
<td>40%</td>
</tr>
<tr>
<td>Home Furnishings</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Groceries (Leisure)</td>
<td>73%</td>
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</tr>
<tr>
<td>Home Furnishings</td>
<td>31%</td>
<td>25%</td>
</tr>
</tbody>
</table>
Consumer behavior in various industries (continued)

Source: The Consumer Barometer Survey 2015
Question: Did people research or purchase their product online or offline?

<table>
<thead>
<tr>
<th>Industry</th>
<th>Research online, purchase online</th>
<th>Research online, purchase offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>67%</td>
<td>21%</td>
</tr>
<tr>
<td>Laptop</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Make-up</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>Mobile Phones</td>
<td>39%</td>
<td>24%</td>
</tr>
<tr>
<td>Music</td>
<td>43%</td>
<td>18%</td>
</tr>
<tr>
<td>Personal Loan</td>
<td>29%</td>
<td>34%</td>
</tr>
<tr>
<td>Real Estate</td>
<td>34%</td>
<td>8%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>30%</td>
<td>37%</td>
</tr>
<tr>
<td>Television</td>
<td>15%</td>
<td>31%</td>
</tr>
<tr>
<td>Vitamins &amp; OTC</td>
<td>31%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Easy to find, easy of purchase!

7 out of 10 of the consumers only consider 1-3 brands before purchase...

...which makes it crucial for the brands to be top of mind.
The Local Shopper

The consumer purchase journey and the role of the internet for local business
How does people research for local businesses?

66% researched locally a day or less before visiting.

...and 86% only consider 1-3 local businesses before deciding where to buy.

Source: The Consumer Barometer Survey 2015
Local Shoppers research practical information

What information should a local business have on their website?

- Location: 28%
- Business hours: 36%
- Prices: 47%
- Availability: 26%
- Contact info: 22%
- Promotions: 19%

Source: The Consumer Barometer Survey 2015
2 out of 10 use a smartphone when looking for local information
The international Shopper

The consumer purchase journey and the role of online for international purchases
How big is international purchase?

54% of the consumers have made an international purchase.

Which products do people purchase in other countries? (most commonly)

- Beauty and health: 10%
- Books, CDs, DVDs or games: 19%
- Clothing, accessories and footwear: 29%
- Household goods and furniture: 9%
- Toys: 5%
- Sport equipment: 5%

Source: The Consumer Barometer Survey 2015
Why do people purchase products online from foreign countries?

- 44% buy from foreign countries because they receive an appealing offer.
- 30% shop in foreign countries to get better conditions (service, terms of payment or price).

Are willing to accept longer delivery time.
Challenges of international purchase

Most consumers have made an international purchase, but some issues occur:

- 3 out of 10 experience issues concerning the website usability
- The most common issue is that websites seem insecure

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Car insurance

The consumer purchase journey and the role of the internet in making their last purchase decision
Car insurance: Highlights

The consumers **compare insurance policies** online.

- **62%** Compared choices
- **23%** Looked for reviews
- **14%** Got store location

**How did people use the Internet to help make their purchase decision?**

Online research has a substantial impact on offline purchases.

- **47%** Researched online before purchasing offline

**Did people research or purchase their product online or offline?**

The insurer’s website is a key driver in online purchase.

- **65%** Insurer (direct)
- **30%** Price comparison site
- **5%** Other

**On what type of website did people make their online purchase?**

Source: The Consumer Barometer Survey 2015

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**Consumer Barometer 2015 Local Report**

SLIDE 42
Car insurance: Highlights

People are using their smartphone when researching for car insurance

But 38% are encountering issues accessing websites via smartphone*

People will try to find another website that works better on their smartphone*

Which devices did people use for product research?

12%

How often do people encounter issues accessing websites via smartphone?

20%
The Smart Shopper – Cinema tickets

The consumer purchase journey and the role of the internet in making their last purchase decision
Cinema tickets: Highlights

The consumers buy cinema tickets online

17%

Where did people make their purchase?

2 out of 10 consumers purchase on promotion

65% of the consumers did online research

Research online, purchased online

50%

Research online, purchased offline

15%

What motivated people’s purchase?

Did people research or purchase their product online or offline?

Source: The Consumer Barometer Survey 2015
Cinema tickets: Highlights

21% are using their smartphone when researching for cinema tickets

38% are encountering issues accessing websites via smartphone*

People will try to find another website that works better on their smartphone*

Which devices did people use for product research?

How often do people encounter issues accessing websites via smartphone?

What do people do after encountering issues accessing websites via smartphone?

Source: The Consumer Barometer Survey 2015

*Based on 20 different categories: Car Insurance, Cinema Tickets, Clothing & Footwear, Do It Yourself (DIY), Flights (Leisure), Groceries, Ground Travel (Long Distance), Hair Care, Home Appliances, Home Furnishings, Hotels (Leisure), Laptop, Make-Up, Mobile Phones, Music, Personal Loan, Real Estate, Restaurants, Television, Vitamins & OTC Remedies
The Smart Shopper – Clothing & footwear

The consumer purchase journey and the role of the internet in making their last purchase decision
Clothing & footwear: Highlights

The consumers do **online research** prior to purchase

1 out of 10 consumers use a **smartphone** to research clothing & footwear

**41%**

**Research online**

**10%**

**Smartphone**

**86%**

**Computer**

**5%**

**Tablet**

*What online or offline research did people do prior to their recent purchase?*

*Which devices did people use for product research?*
Clothing & footwear: Highlights

Many consumers purchase online (46 %)

Store purchases begin online

Consumers purchase clothing and footwear on promotion

Where did people make their purchase?

Did people research or purchase their product online or offline?

What motivated people’s product purchase?

12 %

28 %

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Do it yourself

The consumer purchase journey and the role of the internet in making their last purchase decision
Do it yourself: Highlights

Offline purchases begin online

Research online / Purchase online: 31%
Research online / Purchase offline: 17%
Research offline / Purchase online: 10%

The internet has a substantial impact on purchase

Does online research prior to purchase

48%
Do it yourself: Highlights

48% are using the internet for comparing prices and products

40% make their purchase because they had an urgent need

How did people use the Internet to help make their purchase decision?

What motivated people's product purchase?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Flights (leisure)

The consumer purchase journey and the role of the internet in making their last purchase decision
Flights (leisure): Highlights

85% use search engines when purchasing flight tickets

90% of the consumers research flight tickets online

Among the consumers 80% buy flight tickets online

What online sources did people use to make a purchase decision?

85% Used
15% Not used

What online or offline research did people do prior to their recent purchase?

Where did people make their purchase?
Flights (leisure): Highlights

The consumers use airline websites to purchase flight tickets

62%

18%

Airline  Price comparison website

The consumers compare prices online

71%

Compared choices online

73% of the consumers only research and purchase online

On what type of website did people make their online purchase?

In which part(s) of the purchase process did people use the Internet?

Did people research or purchase their product online or offline?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Groceries

The consumer purchase journey and the role of the internet in making their last purchase decision
Groceries: Highlights

In France 16% of the consumers use a smartphone for online research.

16%

People use the Internet to compare prices:

- Compared prices: 41%
- Got ideas: 10%

12% buy their groceries on offer.

Which devices did people use for product research?

How did people use the Internet to help make their purchase decision?

What motivated people’s product purchase?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Ground Travel

The consumer purchase journey and the role of the internet in making their last purchase decision
6 out of 10 of the consumers use search engines for their purchase decision.

7 out of 10 research online prior to purchase.

59% of people both research and purchase online only.

What online sources did people use to make a purchase decision?

What online or offline research did people do prior to their recent purchase?

Did people research or purchase their product online or offline?
The Smart Shopper – Hair Care

The consumer purchase journey and the role of the internet in making their last purchase decision
Hair Care: Highlights

39% only consider one brand prior to purchase

...but 28% does online research before making a purchase

The consumers use the internet to compare products and prices

25%

How many brands did people consider before product purchase?

What online or offline research did people do prior to their recent purchase?

How did people use the Internet to help make their purchase decision?

Source: The Consumer Barometer Survey 2015
*Based on 20 different categories: Car Insurance, Cinema Tickets, Clothing & Footwear, Do it Yourself (DIY), Flights (Leisure), Groceries, Ground Travel (Long Distance), Hair Care, Home Appliances, Home Furnishings, Hotels (Leisure), Laptop, Make-up, Mobile Phones, Music, Personal Loan, Real Estate, Restaurants, Television, Vitamins & OTC Remedies
The Smart Shopper – Home appliances

The consumer purchase journey and the role of the internet in making their last purchase decision
Home appliances: Highlights

4 out of 10 purchases home appliances online

Where did people make their purchase?

The consumers compare products, prices and features online before purchase

70%

How did people use the Internet to help make their purchase decision?

Source: The Consumer Barometer Survey 2015
Home appliances: Highlights

Consumers buy home appliances based on a urgent need or on discount/promotion

- Urgent need: 52%
- Promotion: 23%
- Other: 25%

The consumers research their purchased products online

Do online research prior to purchase

76%

Online determines offline!

40% researched online before purchasing offline

What motivated people's product purchase?

What online or offline research did people do prior to their recent purchase?

Did people research or purchase their product online or offline?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Home furnishings

The consumer purchase journey and the role of the internet in making their last purchase decision
The consumers’ purchases were driven by online research

55%

Do online research prior to purchase

Online research effect both online and offline sales

31%

Research online, purchase online

25%

Research online, purchase offline

What online or offline research did people do prior to their recent purchase?

Did people research or purchase their product online or offline?
The Smart Shopper – Hotel (leisure)

The consumer purchase journey and the role of the internet in making their last purchase decision
Hotels (leisure): Highlights

4 out of 5 purchases their hotel stay online

89% research hotels online before purchase

....but what online research are the consumers doing?

89%

Where did people make their purchase?

What online or offline research did people do prior to their recent purchase?

How did people use the Internet to help make their purchase decision?

Inspiration: 34%
Compared choices: 55%
Looked up reviews: 45%

Source: The Consumer Barometer Survey 2015
Hotels (leisure): Highlights

Many consumers research and purchase online only

67%

Hotel chain websites is the most popular place to purchase hotel stays

36% Hotel chain
26% Price comparison websites
14% Travel Agent

Did people research or purchase their product online or offline?

On what type of website did people make their online purchase?
The Smart Shopper – Laptops

The consumer purchase journey and the role of the internet in making their last purchase decision
26 % of the consumers purchase their laptop on promotion

...but 71 % does online research before making a purchase

1 out of 5 use a smartphone for doing online research

What motivated people's purchase?

Did people research or purchase their product online or offline?

Which devices did people use for product research?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Make-up

The consumer purchase journey and the role of the internet in making their last purchase decision
28% of the consumers purchase on promotion

Consumers do online research prior to purchase

20% of the consumers who makes a store purchase does online research prior to purchase

38%

Did online research before making a purchase

What motivated people's purchase?

What online or offline research did people do prior to their recent purchase?

Did people research or purchase their product online or offline?
The Smart Shopper – Mobile phones

The consumer purchase journey and the role of the internet in making their last purchase decision
Mobile phones: Highlights

Online goes head-to-head with offline research

57% Online
58% Offline

What online or offline research did people do prior to their recent purchase?

Offline sales begin online.

33%

Did online research before making a purchase offline

62% are influenced by search engines when making a purchase decision

What online sources did people use to make a purchase decision?
The Smart Shopper – Music

The consumer purchase journey and the role of the internet in making their last purchase decision
Music: Highlights

61% of the consumers are purchasing music online

64% does online research before purchasing music

1 out of 5 use a smartphone for doing online research

Where did people make their purchase?

What online or offline research did people do prior to their recent purchase?

Which devices did people use for product research?
The Smart Shopper – Personal Loan

The consumer purchase journey and the role of the internet in making their last purchase decision
Personal Loan: Highlights

The consumers do online research prior to taking out a loan

61% Research online

...and 48% do so via a search engine

...while 2 out of 10 end up making their purchase online

What online or offline research did people do prior to their recent purchase?

What online sources did people use to make a purchase decision?

Where did people make their purchase?
The Smart Shopper – Real Estate

The consumer purchase journey and the role of the internet in making their last purchase decision
Real Estate: Highlights

The consumers does online research prior to purchasing real estate

18 % use a smartphone for online research

34 % of offline real estate sales begin online

65%

Research real estate online prior to purchase

What online or offline research did people do prior to their recent purchase?

Which devices did people use for product research?

Did people research or purchase their product online or offline?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Restaurants

The consumer purchase journey and the role of the internet in making their last purchase decision
Restaurants: Highlights

31% use a smartphone for online research

43% of all sales are driven by online research

Which devices did people use for product research?

What online or offline research did people do prior to their recent purchase?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Television

The consumer purchase journey and the role of the internet in making their last purchase decision
Television: Highlights

The consumers use a search engine when making their purchase decision.

What online sources did people use to make a purchase decision?

What motivated people’s purchase?

Which devices did people use for product research?

64% Used
36% Not used

22% state that their purchases were motivated by a promotion.

9% of the consumers use a smartphone for online research.

Source: The Consumer Barometer Survey 2015
Television: Highlights

The consumers use electronics retailer websites for their online purchases

Online research has a substantial impact on offline purchase

37%

Researched online before purchasing offline

On what type of website did people make their online purchase?

Did people research or purchase their product online or offline?

Source: The Consumer Barometer Survey 2015
The Smart Shopper – Vitamins & OTC remedies

The consumer purchase journey and the role of the internet in making their last purchase decision
Vitamins & OTC remedies: Highlights

Consumers use the internet to compare prices and products

47% researches just moments before making their purchase

17% use the internet for making their purchase

29%

Compare products/prices online to make a purchase decision

In which part(s) of the purchase process did people use the internet?

When did people start researching their product purchase?

Where did people make their purchase?

Source: The Consumer Barometer Survey 2015
The Smart Viewer

Provides insight into people's recent online video use across different devices.
Tomorrow’s TV is Online

58%

Of the users are watching Online video every week

What are the users watching?

37% are watching music videos

10% are watching news

15% are watching sport

Source: The Connected Consumer Survey 2015
The Smart Viewer is a Mobile Viewer

7 out of 10 consumers are watching online video on their smartphones*

*At least once a month

Source: The Connected Consumer Survey 2015
The users watch online video at home and alone

93% of the consumers are watching online video at home

7 out of 10 watch online video alone

Source: The Connected Consumer Survey 2015
*Question: With how many people did you watch video in the last week?
Why are we watching online video?

What motivated people to watch online videos in the last week?

Find product information: 4%
To pursue a hobby: 25%
To learn: 15%
To be entertained: 50%
To relax: 37%

5 out of 10 of the consumers are watching videos because they want to be entertained.

Source: The Connected Consumer Survey 2015
Short videos in the evening

57% of the consumers watch videos that are 5 minutes or shorter.

How long were the online videos people watched in the last week?

5:00

Most people are watching online video in the evening.

At what time did people watch online video in the last week on a weekday?

Source: The Connected Consumer Survey 2015
The Smart Viewer is a Focused Viewer

6 out 10 watch online video content unrelated to their surroundings

64% are focused when watching online video

Source: The Connected Consumer Survey 2015
Methodology

Data in the Consumer Barometer is pulled from two sources - the core Consumer Barometer questionnaire, which is focused on the adult online population and Connected Consumer Study, which seeks to enumerate the total adult population and is used to weight the Consumer Barometer results.
Consumer Barometer 2015
Methodology

Connected Consumer Survey

Population
- Target population: total population (online & offline) 16+ in each country surveyed except:
  - 18+ in Argentina, Brazil, China, India, South Korea, Malaysia, Mexico, Philippines, Vietnam
  - 20+ in Japan

Sampling
- Random sampling aimed to be representative of the total population ages 16+ in all countries.
- Sample size: n=1,000 in each country surveyed (except India, where n=4,000)

Survey administration
- Survey data was collected in all countries via telephone (CATI) or face-to-face interviewing (CAPI/PAPI).
- Questionnaires were administered in local language(s) for all countries surveyed
- Interview length was 25 min. on average for telephone interviews and 30 minutes for face-to-face interviews.

Weighting
- Data was weighted according to local Census data

Timing
- Enumeration surveys were administered between January and March 2014.
Consumer Barometer 2015

Methodology

Consumer Barometer Survey

Population
Target population: online population who use at least one connected device and made a purchase of at least one of the relevant products from the product list. Depending on the country we focused on the population 16+ except:
  • Argentina, Brazil, China, India, South Korea, Malaysia, Mexico, Philippines, Vietnam, the US, Japan

Sampling
  o Sample size was set at a minimum of n=3,000 in each country except some Asian and African countries
  o Quotas were applied in the sampling process with regard to age, gender, educational level and region as well as online activities and smartphone usage to ensure local representativeness for the online population

Survey administration
  o Surveys were conducted through online panels, face-to-face or a combined method of online panel and face-to-face interviews
  o Questionnaires were administered in local language(s) for all countries surveyed
  o Questionnaire length was 20 minutes for online-surveyed markets, 40 minutes for face-to-face countries

Weighting
  o The reported data was weighted against the Connected Consumer Survey. Bases displayed are unweighted

Timing
  o Consumer Barometer surveys were administered between May and September 2014.
THANK YOU!

CONTACTS: