

Google Consumer Barometer

A BIGGER, BETTER BAROMETER!

INTRODUCTION

Nine months ago, we launched the Consumer Barometer, our interactive digital consumer insights tool. This time, we've added more questions, more topics and more insights. We've added data on local searches, international purchases, user segmentation, and included 10 new product categories. And it's still completely free.

Here are some of the insights that caught our eye from the Consumer Barometer.

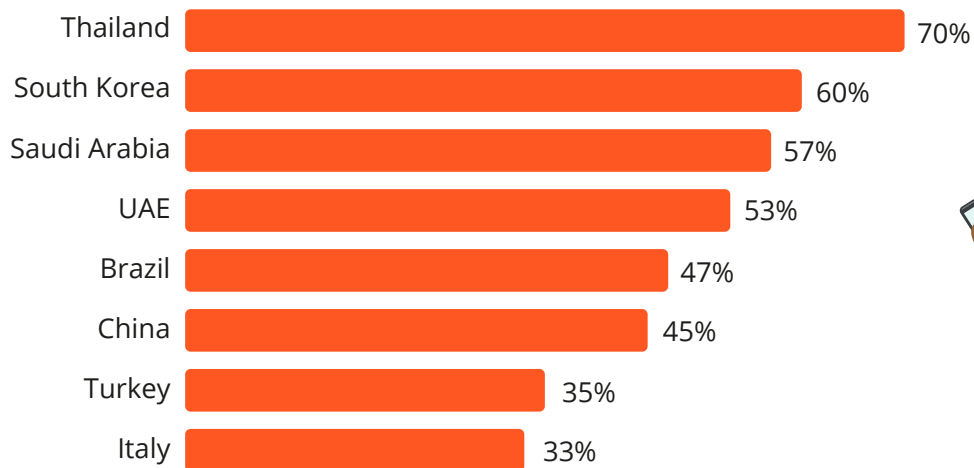
People are more connected than ever before

You might be tempted to think that people in tech-advanced Asia-Pacific countries are most likely to own lots of different devices. In reality, it's Europeans with nearly half of them (48%) using three or more devices. Incredibly, 29% of Norwegians and 29% of Dutch people use 5 devices or more.¹ 31% of Saudis use 3 devices or more. 28% of people in the United Arab Emirates use 4 devices or more. In contrast, only 10% of Chinese people use 4 devices or more.¹

There's also lots of data about how smartphones have changed our world. Think that only young people love their smartphones? Well, in Israel 61% of over 55s people aged 55 and over use a smartphone (compared to 77% of 25-34 year olds), and in Sweden that number is a staggering 64%.¹

In many countries, people love their smartphones so much that they go online more often on smartphones than computers.

Percentage of internet users who go online more often via smartphone than computer/ tablet



With consumers using multiple devices to stay connected, are you doing the same? The Consumer Barometer provides the insights that allow you to understand when, how and why people use the internet and can assist with your planning and decision-making.

¹ Total online and offline population

² Internet users (accessing via computer, tablet or smartphone)

With connection comes commerce: Now that people are more connected, they are ever more reliant on the internet to shop

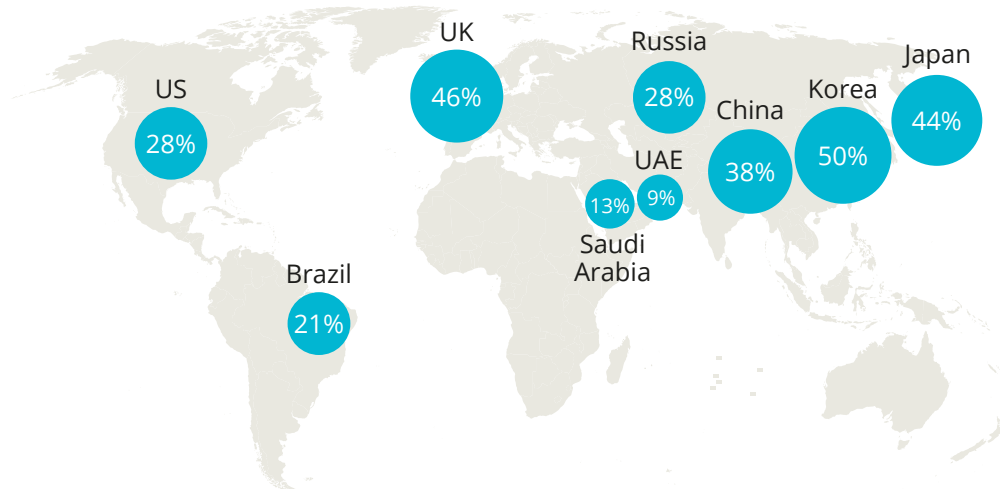
Whether it's an everyday purchase or researching a big-ticket item, people turn to their devices almost instinctively during these key moments. In the emerging markets, smartphones have become invaluable as a research tool. For example, among internet users who researched their last purchase online, 45% of Malaysians and 40% of Filipinos used their smartphone to research. In the Middle East, these figures are even higher - 80% of Saudis and 57% of people in the UAE used their smartphones to research before buying.

In Saudi Arabia, people like to use their smartphones to research - with 80% of those who researched a recent purchase online, using a mobile device.³ This is especially true of younger users with 84% of under 25s having researched a recent purchase using a smartphone.³

In the United Arab Emirates, people still like to use their computers to research - with 58% of those who researched a recent purchase online, using a desktop or laptop.³ However this is closely followed by 57% of people who researched a recent purchase using a smartphone.³

Mobile devices have become an indispensable research tool for those in Saudi Arabia and the United Arab Emirates.

Percentage of internet users who made a recent purchase online



³ Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories) | Researched online

⁴ Countries included: United Kingdom, Spain, France, Italy, Germany, Russia, Austria, Belgium, Croatia, Denmark, Czech Republic, Bulgaria, Estonia, Finland, Hungary, Greece, Ireland, Latvia, Lithuania, Norway, Netherlands, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Sweden, Switzerland, Ukraine, Australia, China, Hong Kong, Indonesia, Japan, Korea, Malaysia, New Zealand, Philippines, Singapore, Taiwan, Thailand, Vietnam, Mexico, Argentina, Brazil, United States, Israel, Saudi Arabia, Turkey, UAE, Canada.

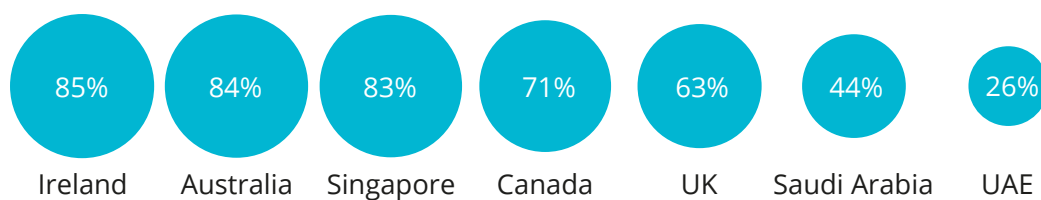
⁵ Internet users (accessing via computer, tablet or smartphone) | Answering based on a recent purchase (in select categories).

People are not just researching online, purchasing online is more popular than ever. Globally,⁴ 62% of internet users either researched or purchased their last product online.⁵ Almost a quarter both researched online and purchased online. Globally, 29% made their last product purchase online.⁵ When looking at a country level, across the 20 product categories that we covered, the top online purchasers are South Korea (50% of internet users), the UK (46%) and Japan (44%).⁵ However percentages are also high across the Nordics - 38% of internet users in Sweden made their last purchase online.⁵ Saudi Arabia and the United Arab Emirates are below average with 13% and 9% respectively making their last purchase online.⁵

The internet has placed the world at our fingertips, and consumers use the internet to explore locally, nationally and internationally at key moments during their path to purchase. When they're researching locally, people are usually looking for a particular product or service (35%) or planning an activity (30%).⁶

On the other hand, people are prepared to look further afield and consider options abroad if they find an appealing offer (36%) or better availability (33%).⁷ In fact, globally, 57% of us have bought something online from a foreign country. In some countries, the levels of international purchases are even higher - it's 85% in Ireland, 84% in Australia and 83% in Singapore.⁷

Percentage of internet users who have purchased products online from abroad



Saudi Arabia's rates of international purchase (44%) are below the global average (57%), but for those aged 35-44 years old, it is far more likely that they have bought a product from overseas. 57% of Saudi internet users in this age group have bought something online from a foreign country.⁷ In the United Arab Emirates' rates of international purchase (26%) are well below the global average (57%), but this is growing amongst those aged 35-44. 30% of internet users in the United Arab Emirates aged 35-44 have bought something online from a foreign country.⁷

The Consumer Barometer shows that in this hyper-connected world, the internet has become crucial for shaping preferences and helping people make decisions about what to buy from both home and abroad. Over half of all internet users are now researching or purchasing online.⁵ Are you present in all of the moments that matter to your consumer? Using these insights to create an integrated marketing strategy can help you reach more of the right people, with the right message, at the right time.

⁶ Internet users (accessing via computer, tablet or smartphone) | Searched for information about local business(es) in the past month.

⁷ Internet users (accessing via computer, tablet or smartphone) | Purchased online via computer, tablet or smartphone

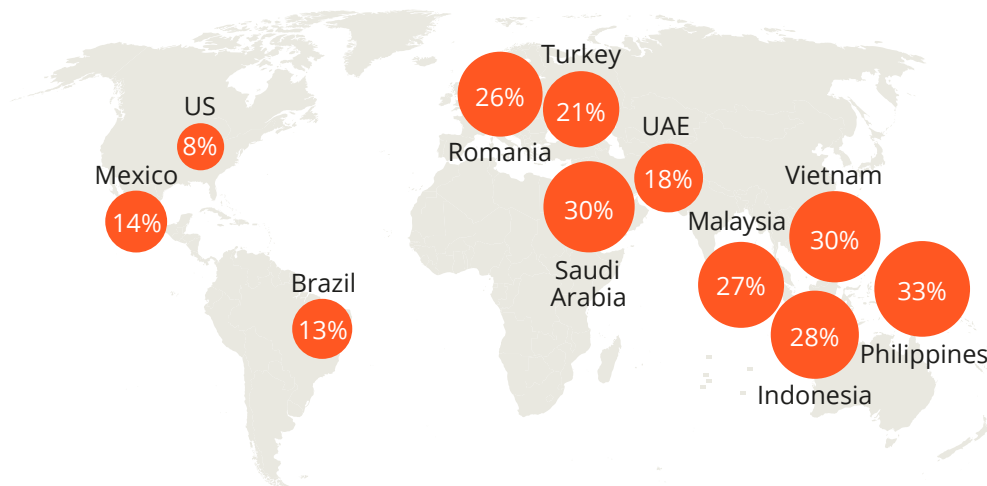
'Living online' has fundamentally changed viewing behaviour

People love online video. 51% of internet users in Mexico and 50% in Brazil watch online video every day.² It's popular in Asia-Pacific too - with 51% of internet users in Singapore and 50% in Thailand doing the same.² In Saudi Arabia, internet users are also big fans - with 51% of all users watching online video every day.² In the United Arab Emirates, it's also popular - with 43% of people watching online video every day.²

People are watching these videos everywhere and on everything - smartphones, tablets and computers. 47% of Saudis who access the internet on their smartphones watch online videos on them every day and 35% of Argentinians who access the internet via their tablets, watch online videos on their tablets every day.

When it comes to specific platforms, YouTube has become part of the daily routine for many with 50% of internet users in Thailand using YouTube every single day.² When it comes to using different devices, nearly half of tablet-using Saudis (49%) watch online videos on YouTube via their tablets⁹ and 45% of Saudi smartphone users watch YouTube on their smartphones every day.⁸ In the United Arab Emirates, YouTube consumption on tablet is slightly lower with 16% watching on their tablets and 28% watching YouTube on their smartphones every day.⁸

Percentage of people who watched online video for product information (among those who watched online video in the past week)



⁸ Internet users (accessing via smartphone)

⁹ Internet users (accessing via tablet)

¹⁰ Internet users (accessing via computer, tablet or smartphone) | Watched online video in the past week |

Answering based on a recent online video session

Although people mainly watch online videos for relaxation, an increasing number watch so that they can be informed too. When asked why they watched online video in the last week, 33% of internet users in the Philippines and 30% in Vietnam said they did so to find information about products.¹⁰ Online video is an increasingly important way of connecting with consumers, and this is especially true in some emerging markets where researching products through online videos is more prevalent.

The Consumer Barometer also dispels the myth that people watching online video are easily distracted. Globally, 61% said they were fully or mainly focused on the videos they were watching.¹⁰ This high level of focus is not specific to a single region: it holds true in every part of the world, suggesting that online video provides a great opportunity to reach an attentive audience. Of those who watched online videos, 73% in Germany said they were fully or mainly focused on what they were last watching, 66% in America and 68% in Vietnam.¹⁰ In Saudi Arabia and the United Arab Emirates, levels of focus are also high, reaching 64% and 65% respectively.

GET STARTED!

Just some of the latest insights that we've gathered using the Consumer Barometer show us that people are more connected than ever, and that the internet plays a crucial role in helping them to shape preferences and make decisions about their purchases. This tool allows us to understand how people are accessing the internet and watching online video, and how these connections online influence purchase decisions.

Visit the Consumer Barometer to gain more insights to inform your marketing strategy so that you can reach more customers in the moments that matter, and connect with engaged audiences.

Go to www.consumerbarometer.com to get started.

When you've found the chart you need, you can share it, download it, or even deep-dive into data behind the chart.

Data for the Consumer Barometer has been gathered by TNS, one of the world's leading market research companies, based on interviews with over 400,000 respondents across 56 countries.

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