

Global TGI

Dispatches 15



Understanding the digital consumer

With the growth of digital device usage the world over, it is important for marketers to understand the ways in which digital consumer behaviour varies across different markets. Kantar Media's TGI has created a segmentation of five different types of digital consumers using its syndicated European study, TGI Europa. This segmentation is based on consumers' digital attitudes and offers insight into how different types of people consume digital technology across the Western European markets of France, Germany and Great Britain.

Nineteen digital attitude statements were identified and used to create the five segments. These attitudes include, "it is important my household is equipped with the latest technology" and "the quality of human contact has been improved through technology" at one end of the spectrum to "computers confuse me, I'll never get used to them" at the other end (see segment map on page 2).

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Global TGI helps marketers to expand markets, launch new products, respond to competitive threats, and plan communications.

We do this by providing a unique 360° understanding of consumer attitudes and behavior – with the depth provided from 700,000 personal interviews conducted annually across 60+ countries.

Typical client engagements can involve market sizing, segmenting, trending, and linking with YOUR survey data.

With insights drawn from the largest network of single-source consumer surveys in the world, marketers can be confident that key decisions are based on actionable, robust, reliable and high-quality research.

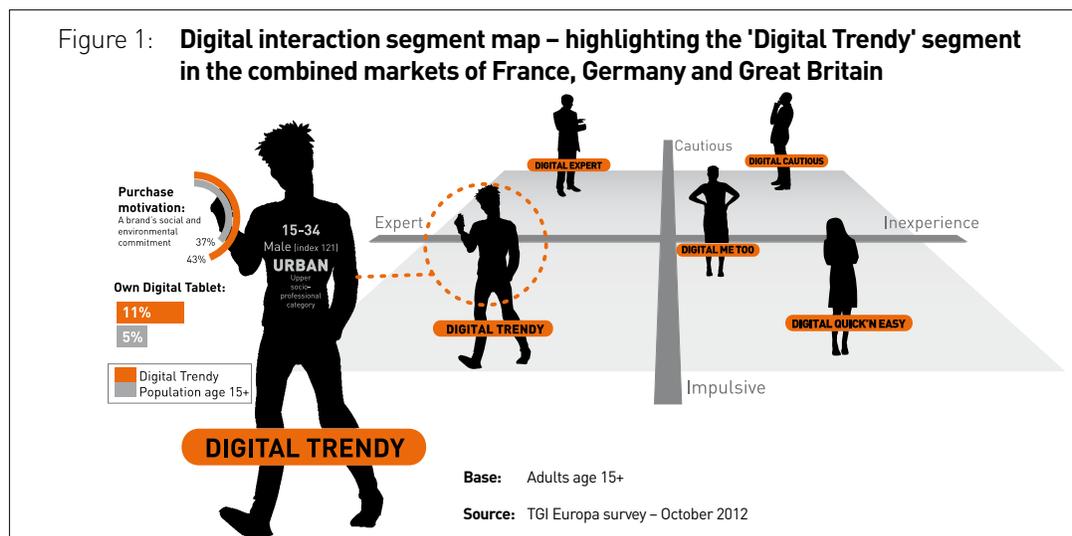
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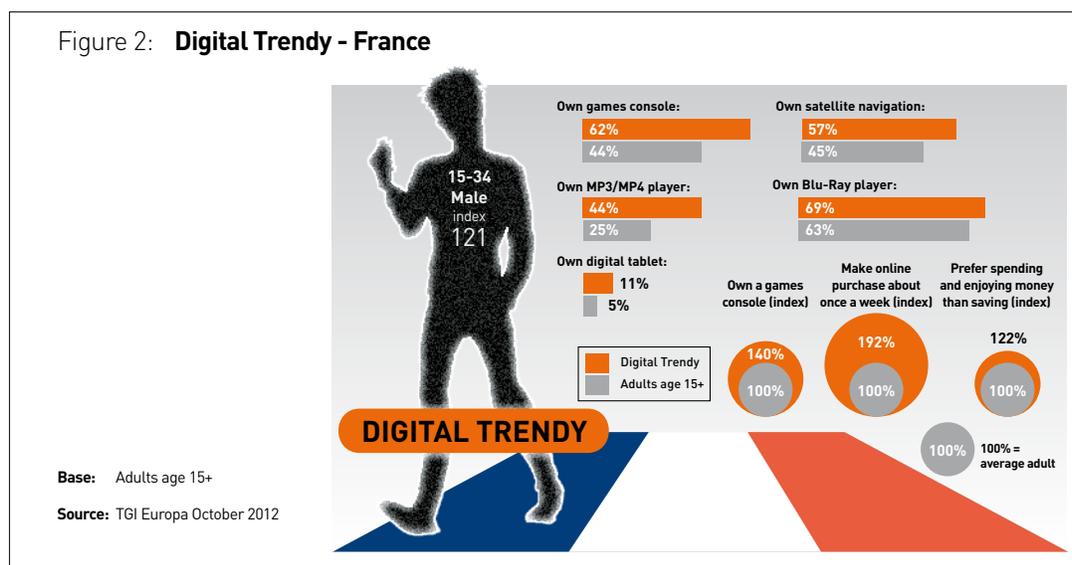
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One of the most important groups is the 'Digital Trendies'. This group represents 19% of consumers across France, Germany and Great Britain. This proportion, however, varies between these three markets. France and Germany have slightly smaller proportions at 18% while Great Britain has the largest proportion of Digital Trendies at 22%. Digital Trendies are younger consumers and more likely to be male across all markets.

Digital Trendies can be analysed across a number of digital variables in each of these markets individually. For French Digital Trendies, the focus here is on what devices they own. For German Digital Trendies, purchase motivators for buying mobile phones are analysed and for British Digital Trendies, the focus is on their high-tech behaviour.

France



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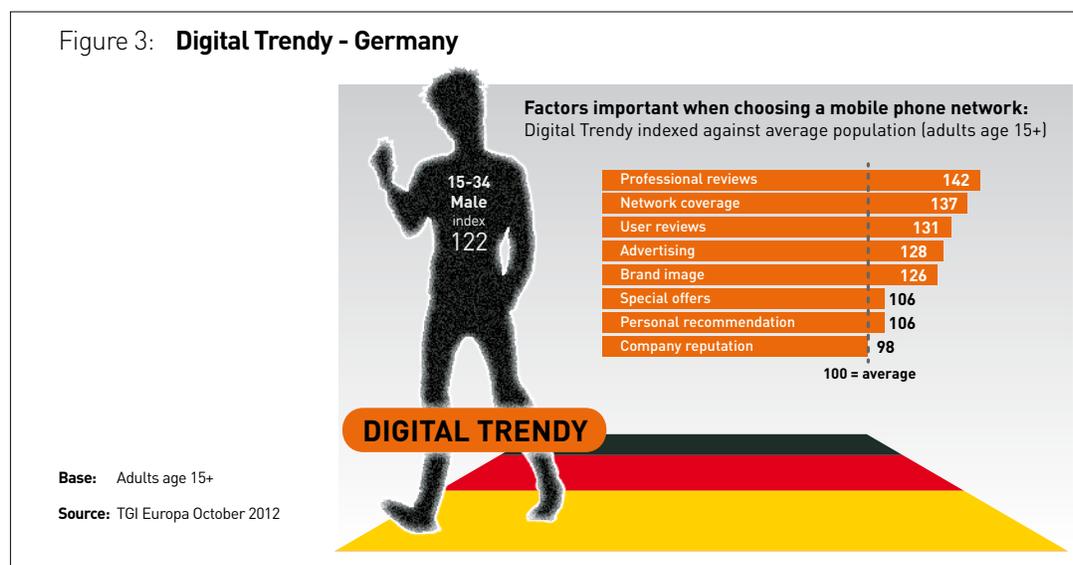
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In terms of their devices owned, 11% of Digital Trendies in France own a tablet compared to just 5% of the total French population. They are also big gamers: they are 40% more likely than the average French adult to own a games console. Only a quarter of the French population own an MP3 or MP4 player, whereas 44% of Digital Trendies own one. This group is also significantly more likely to have a Sat Nav and a Blu-ray player. This indicates that these Digital Trendies are a tech-savvy group who like to own an array of different technology. They are also more comfortable with purchasing online: they are 92% more likely than the average French adult to make an online purchase about once a week. The good news for marketers is they are ready to part with their cash; they are 22% more likely to prefer spending and enjoying their money than saving it.

Germany



European consumers have never had more choice of mobile phones and service plans. Understanding consumer rationale behind choosing a network is therefore key for marketers hoping to make sense of this market. Digital Trendies in Germany are 42% more likely than the average German adult to view professional reviews as an important deciding factor when choosing a mobile phone network. They are also 37% more likely to view network coverage, 31% more likely to view user reviews and 26% more likely to view brand image as important factors. At the other end of the spectrum, the least important factors to them are company reputation (index: 98), personal recommendation (index: 106) and special offers (index: 106). This confirms that Digital Trendies are image-conscious and savvy. They are also 28% more likely to cite advertising as an important factor, meaning they are likely to be receptive to strong brand messages.

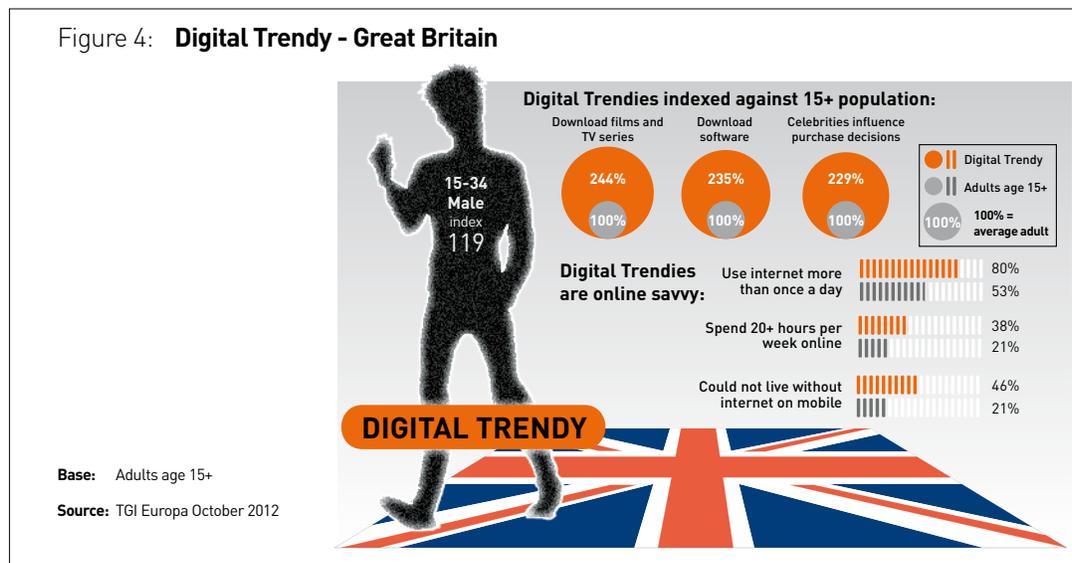
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Great Britain



Looking now at behaviour, Digital Trends in Britain are an online-savvy group: 80% of them use the internet more than once a day, compared to 53% of the entire population. Close to 40% spend at least 20 hours online a week, which is almost double the proportion for the total British population. Whilst browsing online, they are significantly more likely than the average British adult to download paid for films, TV series and software, leave comments on blogs and read and write Twitter feeds. They are over twice as likely as the average British adult to say they could not live without the internet on their mobile phone (46% vs. 21%), suggesting they keep up-to-date when on the go. They are also 129% more likely than the average British adult to say celebrities influence their purchase decisions. So not only are they influenced by what others say, they actively create content online meaning there is great potential in this group to spread a brand message virally and reach fellow influencers.

Being able to plan marketing and media activity at both a local and international level with a single data currency, rather than switching between data sources, is key to brands gaining a competitive edge. Exploit our Global TGI network and create your segmentations in more than 60 markets worldwide.

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