

Digital Lives of Business Leaders

Examining the digital lives, platforms and devices of global business leaders

AUDIENCE REPORT 2018

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Introduction

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

This report explores:

- Demographics
- Consumer Segments
- Social Media and Content
- Device usage and brand appreciations
- Purchase journeys, B2B and B2C

DEFINING BUSINESS LEADERS

In this report, business leaders are defined in terms of job role from top leadership – CEOs, managing directors and the C-suite, down to directors and senior managers. We have excluded part-time workers and the self-employed, as well as middle managers and the broad category of business decision makers. Respondents aged 24 and below, have been excluded, to focus on more experienced leaders. Companies with fewer than 10 employees have also been excluded.

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

Key Insights

Business leaders are more likely to be male, older, and more highly educated than the average online user - particularly in Europe and the United States. This generational difference substantially impacts their chosen media.

As older audiences in more mature markets, **North American and European business leaders are overall less digitally engaged** than the average global business leader, and have a more pronounced preference for traditional media - and a face-to-face meeting.

There are aspects of business leaders' digital behavior that set them apart from similar high-income groups. In part because of their travel habits and professional obligations, **they're far more likely to use VPNs and ad blockers.** This blunts the effectiveness of sophisticated ad-targeting, particularly when business leaders travel - which they do substantially more often than the general population. **Targeting through social, rather than search or display, can circumvent this hindrance.**

Business leaders are extremely well-connected digitally and keen to keep on top of trends, though there are significant regional differences. By 2018, they have become mobile-first on a global level, over-indexing on technological engagement, and have short product replacement cycles.

On the other hand, **40-50% of business leaders express fairly strong reservations about the role of technology.** Globally, they're twice as likely as the general population to say they don't understand computers and new technology. Many feel technology has made life more complicated, even as an outsized proportion organize their lives around technology. **There's a gap between love and reliance.**

Outside the B2B space, business leaders make up a highly desirable consumer group in the luxury goods, travel and hospitality space. **Pinboards and self-curated inspiration sources are particularly popular with this audience.**

Chinese business leaders are the most connected, eager to seek out new technologies across the board, but China's unique digital landscape means **this group can be harder to reach.** Social engagement is lower, and in this market, social media are shifting into messaging and commerce, which can marginalize B2B communications relative to other messaging.

Brands need to be attuned to business leaders' unique habits. **Time-poor and ambitious, they are an audience accustomed to brands and businesses coming to them.** Search, social and word-of-mouth underperform compared to more direct channels of communication where business leaders control the channel.

Because they are so highly targeted by communications, and less likely to research products and services through general-purpose search engines, **brands will need to split marketing efforts** sharply by sub-audience within this space.

Digital Lives of Business Leaders

Business Leaders as People

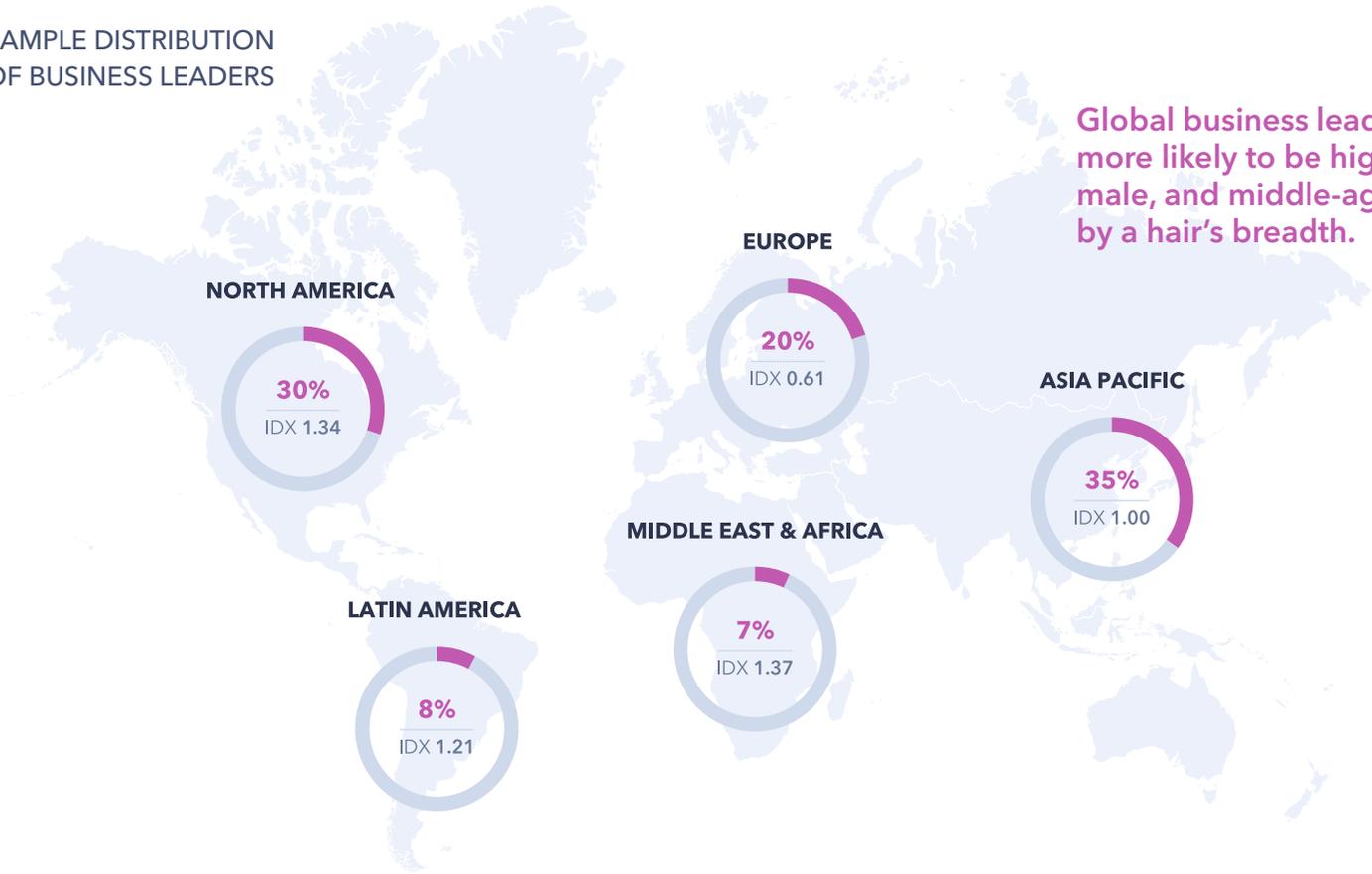
Sample

The definition of business leaders as managers between the MD and CEO level rendered a sample of 12,653 respondents from 40 countries, including approximately 3,300 in the United States, 10,015 in China, 900 in the United Kingdom, and 1,000 in India.

Every country surveyed by GlobalWebIndex was represented with the exceptions of Ghana, Kenya, Morocco and Nigeria, where respondents answer a mobile version of the survey that does not ask about occupational level.

Because of large regional differences in social media landscapes, this report examines business leaders from the 5 global regions separately. China is treated separately with regard to specific applications and platforms used.

SAMPLE DISTRIBUTION OF BUSINESS LEADERS



Global business leaders remain more likely to be highly educated, male, and middle-aged - but only by a hair's breadth.

Demographics of Business Leaders

Business leadership remains a male-dominated profession, despite some limited movement in some regions toward greater gender equality. Overall, women account for 31% of senior business leaders, with ranges from 39% in Latin America to 15% in the Middle East.

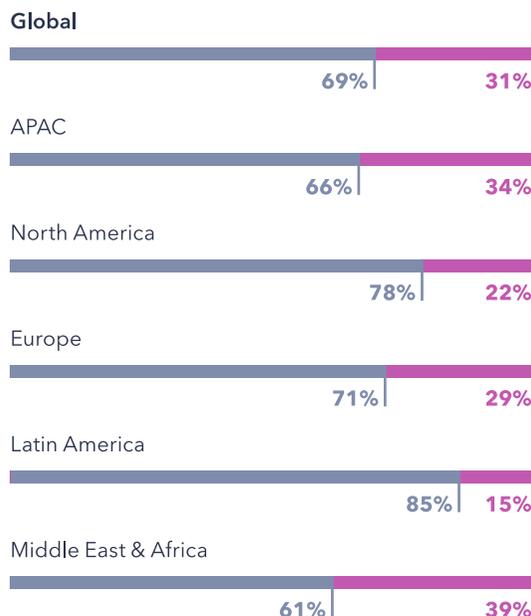
Even after excluding the youngest audience, we find that 43% of global business leaders online are Millennials between the ages of 25 and 34. This is an area where regional differences are especially pronounced, though. **Millennials make up 52% of business leaders in Latin America, but only 31% in Europe.** This is a tremendous difference. **Generational divides are as large or larger than cultural or regional when it comes to engaging business leaders online.**

In relative terms, people in the 35-44 age group are the most likely to be business leaders - 1.6x more likely globally. In Europe and the United States, the 45-54 and 55-64 brackets also over-indexed for business leaders, as would be expected given the older median ages of those countries.

Despite the fame of many university drop-out CEOs, **global business leaders tend to be much more highly educated.** Across the surveyed markets, business leaders were 20% more likely to have university degrees than the general online population, and almost four times more likely to have postgraduate degrees. North American business leaders are the mostly highly educated - 38% hold postgraduate degrees, vs. 15% in the Middle East-Africa region.

AGE, EDUCATION AND GENDER

BY GENDER ● Male ● Female



BY EDUCATION INDEXES



BY AGE INDEXES

	Global	APAC	NorthAm	Europe	LatAm	MEA
25 to 34	1.54	1.61	1.49	1.30	1.12	1.41
35 to 44	1.63	1.67	1.67	1.60	1.62	1.65
45 to 54	1.13	1.02	1.21	1.35	1.61	1.14
55 to 64	0.76	0.62	0.71	1.19	1.32	0.89



Digital Lives of Business Leaders

Business Leaders as Digital Consumers

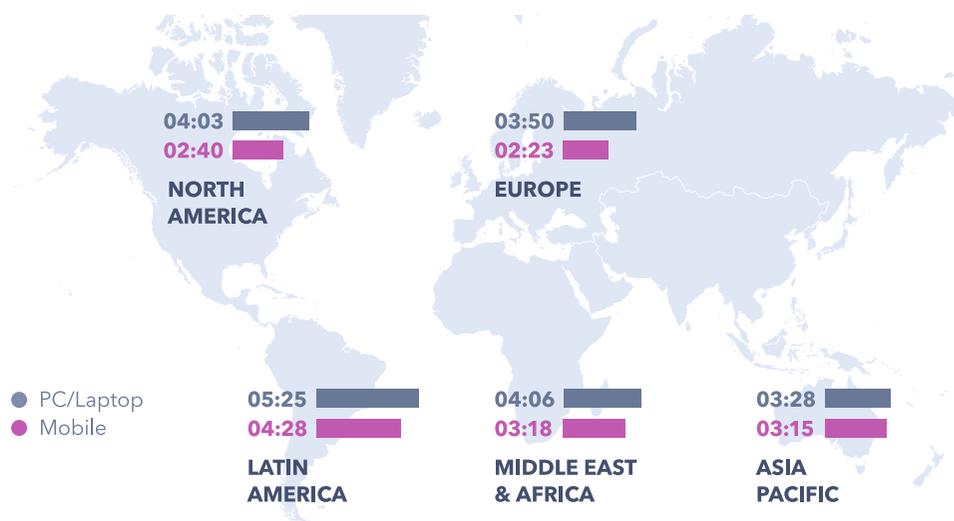
Business Leaders as Digital Consumers

Business leaders, with their high travel frequency, high-income, time-compressed lifestyles, have been driving the technological shift from analog to digital and stationary to mobile tech since the 1950s. While the rest of the world has increasingly caught up, business leaders remain an extremely connected and engaged digital user group.

Three in four business leaders say it's **critical** for them to be contactable at all times, and so the vast majority never cease to be connected online. A global commitment to tech, tempered with caution about privacy and complication, masks major regional and generational differences in how this audience approach their digital lives, devices, social media, and the content they consume.

Business leaders are famously time poor. As reported in our research, 77% say they strive to fit as much as they can into a day, and staying online is a key part of that. In some regions, business leaders are spending upwards of 5 hours a day online on laptops, tablets and PCs – not counting mobile usage, which accounts for another 3 hours.

TIME SPENT ONLINE BY REGION



76% of business leaders say they're constantly connected online.

Across a range of metrics and behaviors, they emerge as a group that clearly prioritize *active* and *expressive* use of the internet. News, work and networking are the factors that bring business leaders online. However, compared to the average internet user – and to other people in

their income and social bracket – business leaders are more motivated by the prospect of connecting with new people and promoting their careers. There's a purposeful undercurrent in the areas where they overindex.



Question: Roughly how many hours do you spend online on a during a typical day?
Source: GlobalWebIndex Q2 2018 **Base:** 10,015 Global Business Leaders

Business Leaders as Digital Consumers

WHY BUSINESS LEADERS USE THE INTERNET

MOTIVATION TYPE		INDEX
EXPRESSIVE	Share and promote my business expertise	47% 1.61
PROFESSIONAL	Networking for work	54% 1.37
SOCIAL	Meeting new people	42% 1.69
EXPRESSIVE	Share content	38% 1.55
PROFESSIONAL	Organize my life	48% 1.45
COMMERCE	Research/find products to buy	53% 1.16
CONTENT	Stay up-to-date on news/events	57% 1.15
PERSONAL	Research how to do things	54% 1.12

Business leaders express more social, relationship-oriented reasons for using the internet than they do for using social media, in relative terms. This might be because other communications channels that they do not consider social media, like e-mail or messaging services, are serving these purposes. Some 84% of business leaders use chat and messaging services like WeChat or WhatsApp. This may also **reflect a less personal, more goal-oriented approach to social media**, which is reflected in the types of accounts they're likely to follow (cf. **Social Media**.)

DIGITAL BEHAVIOR SEGMENTATION



More than two thirds fall into the online **Reviewer** category, and almost 8 in 10 are **Sharers**, which reflects their higher-than-average interest in both expressing their own opinions and interest in influencer content.



Question: How important are these reasons for you using the internet? Very important
Source: GlobalWebIndex Q2 2018 **Base:** 10,015 Global Business Leaders

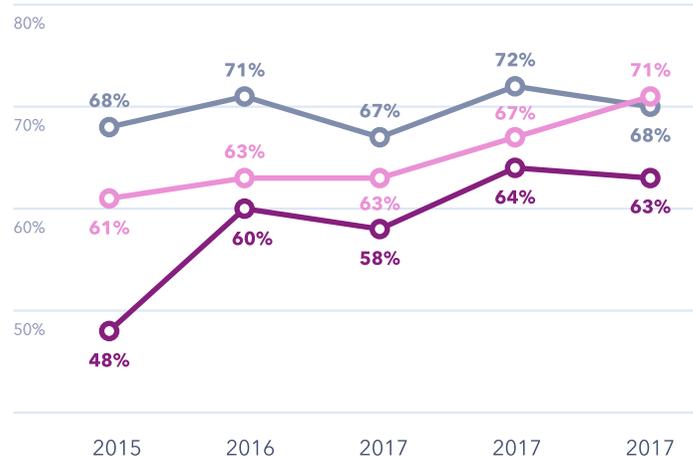
Business Leaders as Digital Consumers

Even more so than most consumers, **business leaders are concerned by the privacy risks inherent in digital transformations.** This applies both to their own data and how companies are using personal data more generally.

As a result, **two-thirds prefer to be anonymous online.** They're also heavy users of VPN services and ad-blockers compared to the general population (73% and 18% more likely, respectively). As frequent travelers and relatively heavy consumers of online content, their main reasons for using VPNs are practical, but **1 in 6 business leaders use a VPN to stay anonymous online - and more than 1 in 8 do so to shield their activities from their governments.**

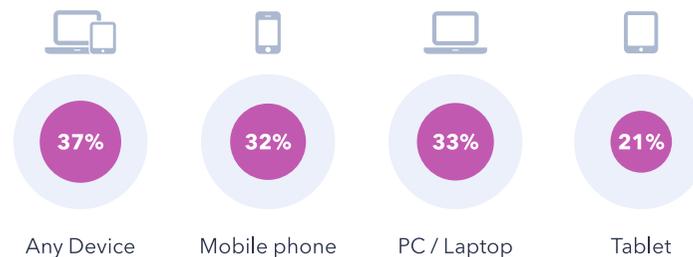
GROWING PRIVACY CONCERN

- I am concerned about the internet eroding my personal privacy
- I worry about how my personal data is being used by companies
- I prefer to be anonymous when using the internet



Business leaders' privacy concerns are real and growing

USE OF VPNs



Engagement with tech doesn't mean love

Business leaders' views on the internet and technology show a deep divide. While they over-index strongly on the properties that normally qualify internet users as Technophiles - needing to stay connected, wanting the newest technology, and so on - the misgivings they voice exclude them from their category. As a group, business leaders are radically switched on to tech trends, but there's also a **considerable subset of business leaders who are outright techno-skeptics.**

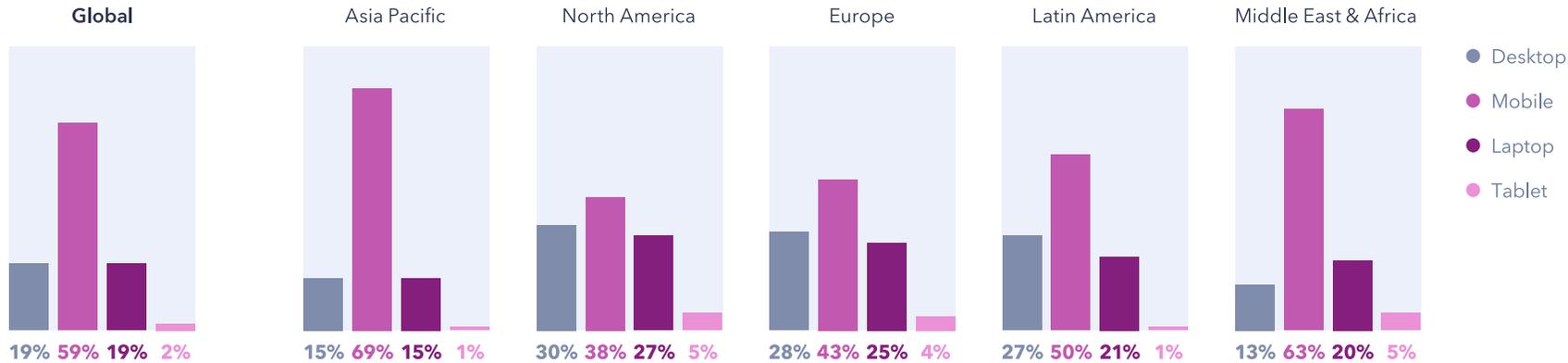
42% of business leaders say they don't understand computers and new technology - twice as many as the general population. This sentiment is especially prevalent in the Asia-Pacific region, where 49% of business leaders agree. With the sole exception of leaders in the Middle East-African region, they're also far more likely to believe that technology makes life more complicated than the average internet user.



Question: To what extent do you either agree or strongly agree with the statements below? **Source:** GlobalWebIndex Q2 2018 **Base:** 10,015 Global Business Leaders

Devices

DEVICE IMPORTANCE



Tools of the trade: Global business leaders rate their mobile as their most important device. And their phones account for 46% of business leaders' time online.

In line with the global average, 59% of business leaders think of their mobile device as the most important way they access the internet, ranging from 38% in North America to 69% in APAC. This shift isn't nearly as advanced in North America, and somewhat less so in Europe, too. The audiences are older and have not seen the the leap-frog pattern of technology adoption that led mobile and laptop devices to be embraced from the beginning. **We see business leaders spending just under half their time online on their mobile units** - ranging from 38% in Europe to 50% in the Asia-Pacific region.

High-rate of change. Business leaders are unusually keen to stay on top of technological developments, compared to the general population of internet users. They over-index strongly on wanting the latest technological products (1.52 IDX), planning to exchange their phones in the near future (1.76), and are much less likely to keep their phones more than a year (0.68). This is largely driven by their deep reliance on technology: **the vast majority would feel more uncomfortable without their phones than their wallets, rely on using apps to organize their lives, and need to be reachable at all times.**



Question: 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:** 10,015 Global Business Leaders

Devices

THE SMARTPHONE BRANDS THEY HAD, HAVE, AND WANT

Brand	Had	Have	Want	Want (Index)
Samsung	27%	47%	50%	1.23
iPhone	24%	42%	47%	1.21
Huawei	14%	13%	14%	0.73
Oppo	11%	11%	10%	1.09
Microsoft	12%	11%	6%	2.01
Sony	18%	10%	9%	1.14
LG	18%	10%	8%	1.15
Lenovo	14%	10%	6%	1.37
Xiaomi	12%	10%	10%	0.78
Motorola	21%	9%	7%	1.19
Nokia	28%	8%	6%	0.98
BlackBerry	17%	6%	4%	2.03

Samsung and the Apple phones lead the field, but business leaders also exhibit some taste differences that reflect their unique circumstances. Notably, their future preference for BlackBerry is twice as high as the general population, just as their current rates of ownership are too. Based on future purchase plans, we would expect some degree of consolidation in the market among business people: Samsung, Apple and Huawei are the only major brands desired by more people than currently own them.

TREND IN ACTION



Blackberry still has a substantial standing with business leaders – at least compared to the general population. Hoping to tap into widespread concerns about security and privacy, Blackberry’s CEO John announced a new foray into enterprise security (September 2018) to expand the firm’s presence outside its traditional handset market.

Blackberry devices may have lost their momentum in the market, but the brand’s reputation for security has endeared it to business users and buyers for more than a decade. Repurposing their expertise and brand value might just be the way back into the boardroom, if not the briefcase.



Question: Which of the following mobile brands have you previously owned/ do you currently own/ would be your top choice when you next upgrade or buy a new mobile phone?

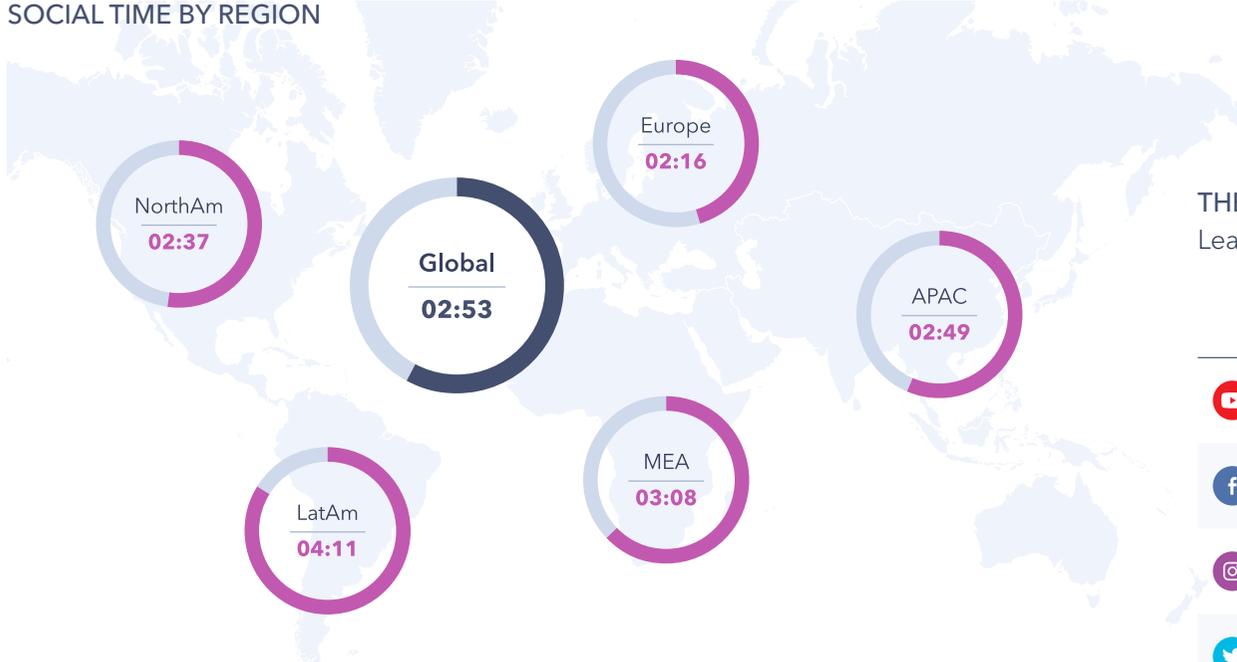
Source: GlobalWebIndex Q2 2018 **Base:** 10,015 Global Business Leaders

Digital Lives of Business Leaders

Business Leaders on Social Media

Business Leaders on Social Media

SOCIAL TIME BY REGION



Time-poor or not, business leaders still manage to make time for social media, whether for personal or professional reasons. **3 hours a day on social media is typical for a business leader**, though this varies strongly by region and age.

In line with their overall digital conservatism, European and North American business leaders spend considerably less time online. Business leaders in Europe are particularly less wedded to social media: average usage is just 2:16 hrs, well below the global average. In this they're

no different than the general online population, 98% of whom maintain some kind of presence on social media.

The Indexes show us how they differ as business leaders. Business leaders don't limit themselves to LinkedIn or encrypted messaging services, and although these types of service do enjoy a great deal of popularity with the audience, they're also very reachable through conventional social channels. *Why they're on social media is a different matter, however.*

THE PLATFORMS BUSINESS LEADERS USE

Leader's social media usage

	Global	China
YouTube	88%	42%
Facebook	85%	45%
Instagram	69%	35%
Twitter	67%	42%
Facebook Messenger	63%	37%
WhatsApp	62%	23%
Google+	55%	31%
LinkedIn	54%	32%
Skype	53%	23%
Pinterest	39%	20%



Question: How frequently do you visit/use these social platforms/services? **Source:** GlobalWebIndex Q2 2018
Base: 10,015 Global Business Leaders

Business Leaders on Social Media

REASONS TO BE ON SOCIAL

		INDEX
To promote/support charitable causes	22%	1.78
To watch/follow sports events	26%	1.38
To network for work	32%	1.35
To share details of what I'm doing in my daily life	25%	1.24
To follow celebrities/celebrity news	22%	1.19
To meet new people	29%	1.09
To share my opinion	32%	1.09
To make sure I don't miss out on anything	22%	1.02
To research/find products to buy	30%	1.01
General networking with other people	31%	0.95
To share photos or videos with others	30%	0.94
To stay up-to-date with news and current events	35%	0.88
Because a lot of my friends are on them	28%	0.87
To stay in touch with what my friends are doing	35%	0.86
To find funny or entertaining content	29%	0.80
To fill up spare time	28%	0.73

Business leaders aren't that social. Their top-listed social media activities are public, professional and purposeful (supporting charitable causes, networking) – and sport. It's work and play, distinctly, rather than casual use or killing time. Compared to the reasons they use the *internet*, their use of social media is distinctly less *social*.

Business leaders show a purposeful approach to social media. Like many social media users, business leaders enjoy entertainment content on social media, such as following sports events or even celebrities, but they're also less interested in many of the topics that attract many people to social media: characteristically, keeping up to date with friends and family.

Business leaders value influential voices online. Business leaders are notably more likely to follow journalists, politicians, and other business people on social media than average users. Journalists stand out as the absolutely most listened-to voices among business leaders across all global markets. Considering their motivations for going online, business leaders seem to be a group that not only seeks out influential voices, but genuinely values them.

SUBSTANCE OVER SOCIALIZING

		INDEX
Journalists	22%	1.87
Politicians	24%	1.75
Entrepreneurs/business people	31%	1.74
TV Presenters	24%	1.65
Charities/good causes	23%	1.51
Sports stars	30%	1.39
Bloggers	25%	1.21
Vloggers	19%	1.20
News/media organizations	36%	1.19
Contacts relevant to your work	33%	1.18
Brands you are thinking of buying something from	27%	1.07
Comedians	25%	1.05
Brands you like	39%	1.04
Singers, musicians or bands	29%	0.93
Actors	29%	0.91
People you know in real life	40%	0.77



Question: What are your main reasons for using social media?/Who do you follow on social media? **Source:** GlobalWebIndex Q2 2018
Base: 10,015 Global Business Leaders

Digital Lives of Business Leaders

Commerce & Media

Brand Discovery

As with most audiences, search engines are the main way business leaders discover and research brands. They aren't so absorbed in work that they don't encounter mass media, but they are time-poor and sufficiently insulated that these sources have a significantly diminished impact.

From TV ads, word-of-mouth from friends, online ads, TV shows/films, recommendations on social media, and in-store displays, many of the most popular routes of brand discovery underperform with business leaders. As a group that are heavily marketed to, as business decision makers and consumers, it is comparatively more difficult to gain and sustain their attention.

Business leaders have to opt-in to the medium before they'll consider the message

Business leaders' online behavior is purposeful and content-driven. This influences brand discovery strongly. The shift in their attention away from **unsolicited** to **self-chosen sources**, relative to the general audience, explains outsized impact of sources like vlogs (less likely to be encountered randomly), cinema (where they've made the trip), and emails from companies (where they've signed up).

Compared to the average internet user, business leaders will pay more attention to updates from brands they follow on social. **Word of mouth - whether from family or comments on social media** - doesn't lead to discovery as often as with other users. As a heavily marketed-to group, both professionally and personally, business leaders have **the luxury of responding** to inputs at an even greater extent than other consumers. But when the content is expected and opted-in to, like brochures, it does well.

TOP BRAND DISCOVERY SOURCES



Search is the most common way business leaders discover brands but, relatively speaking, it underperforms



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:** 10,015 Global Business Leaders

Brand Discovery

BRAND DISCOVERY SOURCES

● Most important ● Least important

Asia Pacific

Deals on group-buying websites	1.64
Stories in printed media	1.51
Updates on brands' social media pages	1.49

North America

Stories in printed media	1.30
Deals on group-buying websites	1.27
Emails or letters/mailshots	1.26

Europe

Forums/message boards	1.34
Stories in printed media	1.32
Deals on group-buying websites	1.28

Middle East & Africa

Personalized purchase recommendations	1.67
Billboards or posters	1.59
Ads seen on public transport	1.57

Latin America

Deals on group-buying websites	1.61
Updates on brands' social media pages	1.55
Cinema ads	1.51

Search engines	0.75
Friends and family	0.79
TV ads	0.80
Comments on social media	0.76
Celebrity endorsements	0.77
Posts or reviews from expert bloggers	0.78
TV shows/films	0.83
Ads seen before online videos or TV shows	0.84
Ads seen online	0.85
Friends and family	0.96
TV shows/films	1.01
TV ads	1.04
Friends and family	0.88
Search engines	0.96
TV ads	0.97

With age and cultural differences, it's no surprise that business leaders from different regions don't have the same purchase journeys. Traditional and non-social media sources are the top brand discovery routes for European and American business leaders. There's a digital lag here, except with regard to discount sites like Groupon, which have a particular hold on this audience.

Latin America sources, as always, is an outlier, in that Business Leaders in that region list a considerably broader range of brand discovery sources. **Social sources are twice as important in Latin America than with business leaders in other regions,** followed by forums and message boards, which they use at more than 3 times the rate of the lowest audience, Europe.

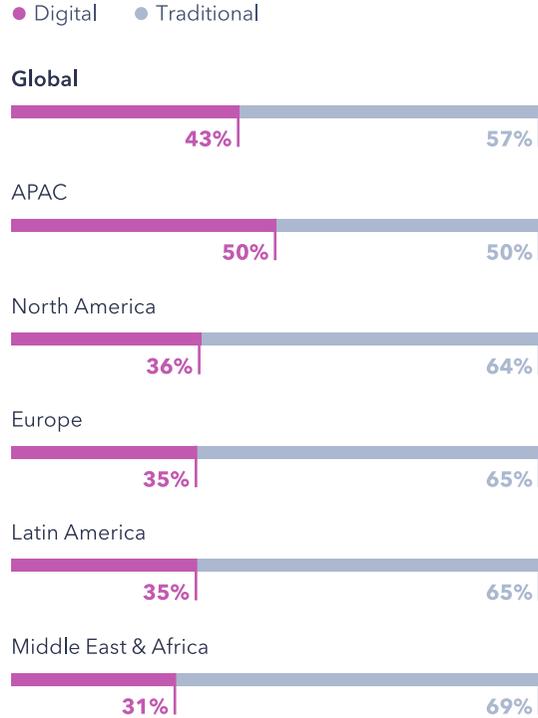
Social sources of inspiration consistently outperform among business leaders in Latin America. This is partly down to their lower average age, but the same pattern repeats across demographics in the region.

Business Leaders as B2B Consumers

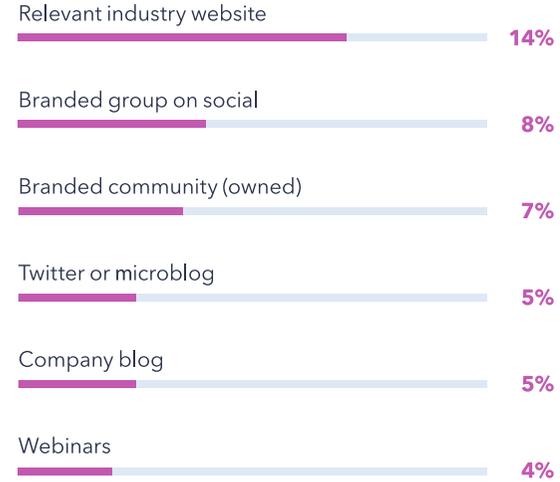
Traditional salesmanship through digital platforms is the key to approaching business leaders. Relevant websites (14%) and outreach by sales executives (10%) are the most influential purchasing decisions with this audience. This reflects how these channels are working in tandem - websites are raising awareness and giving time for them to research on their own time, and serving as catalogs, while presentations finish deals.

B2B media preferences do vary by region. With their characteristic digital conservatism, **relevant websites** and classic **sales presentations** open the doors to European and North American businesses. Webinars, social feeds and blogs might be conversation starters, but industry websites are by far the most important source. Branded communities eclipse other social channels and content types. Again, these are platforms they would have opted into. There's little to be gained from expecting business leaders to click through ads and mass mailings, unless they can bring them into channels they're more likely to trust.

PREFERRED APPROACHES



PREFERRED DIGITAL CHANNELS



43% of businesses cite a digital source as the most influential in B2B decisions

Traditional sources are defined as: Sales presentations; Advertisements in traditional media (e.g. TV, newspaper); News story; Conferences; Direct Mailings with product/company information; Ads in relevant trade press; Corporate events/entertainment



Question: When purchasing products/services for your business or department, which of the following sources most influences your decision?
Note: Question only asked to business leaders who make purchasing decisions on behalf of department or business.
Source: GlobalWebIndex Q2 2018 **Base:** 2,590

Product Research

BRAND RESEARCH SOURCES

● Most important ● Least important

Asia Pacific

Online pinboards	2.13
Micro-blogs	1.87
Vlogs	1.81

North America

Online pinboards	1.52
Micro-blogs	1.21
Forums/message boards	1.21

Europe

Specialist/independent review sites	1.35
Forums/message boards	1.32
Price comparison websites	1.19

Middle East & Africa

Messaging/live chat services	1.59
Vlogs	1.54
Micro-blogs	1.50

Latin America

Vlogs	1.85
Blogs on products/brands	1.56
Online pinboards	1.53

Search engines	0.76
Consumer reviews	0.83
Social networks	0.83

Social networks	0.73
Discount voucher/coupon sites	0.79
Mobile apps	0.79

Social networks	0.73
Discount voucher/coupon sites	0.79
Mobile apps	0.79

Mobile apps	0.77
Social networks	0.80
Discount voucher/coupon sites	0.83

Search engines	0.87
Discount voucher/coupon sites	0.90
Consumer reviews	0.91

Business leaders are less likely to use search engines or consumer reviews to research products

Business leaders use many of the same channels for product research as other online consumers: search (used by 40%), consumer reviews, even social media - but with considerably lower indexes globally speaking. Instead, sources where they are better able to control what they look at - niche review sites, online pinboards, micro-blogs and vlogs - over-index. General-purpose social sources underperform across regions where business leaders are older (especially North America and Europe) but perform better in MEA and the Latin America region.

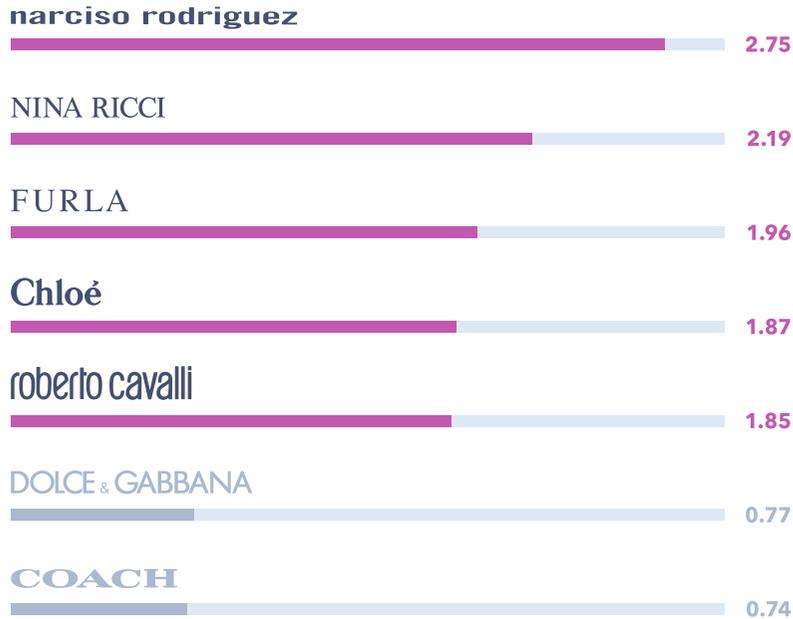


Question: When purchasing products/services for your business or department, which of the following sources most influences your decision?

Note: Question only asked to business leaders who make purchasing decisions on behalf of department or business. Question classified from PRO. 2590 **Source:** GlobalWebIndex Q2 2018 **Base:** 2,590

Business Leaders as Luxury Consumers

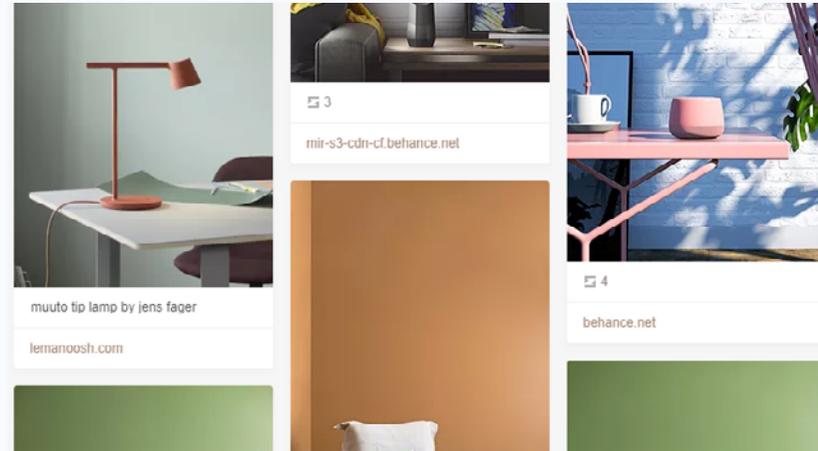
BUSINESS LEADERS' PREFERRED LUXURY FASHION BRANDS



Benchmark vs. the global top 10% income group

Business leaders' research habits are a crucial topic for luxury, travel and financial brands to follow, especially as they often sit in research-heavy categories, and need to reach this audience that is relatively small, niche, and uninterested in many forms of paid media. Compared to other high income earners, a few luxury brands stand out as uniquely popular with these audiences. These are European scent and accessory brands - comparatively flashier and more youthful 'brands' did worse, suggesting a hint of conservatism in the audience.

China: A Pinboard Speaks A Thousand Words



Search is an underperforming category with business leaders globally, and in particular in China when it comes to product research. Instead, business leaders in China are twice as likely to use micro-blogs, chat and online pinboards.

While chat and microblogging often come up in discussions of China's media landscape, pinboard are relatively overlooked. These aren't niche or Millennial-only platforms, but reflect how much closer social, commerce and person-to-person communications are integrated in PRC's unique media landscape.

The most popular online pinboard service, Pinterest, isn't accessible in China. Instead, sites like **Huaban**, **Mogujie** and **Zhipin** have combined social picture sharing and e-commerce in ways that attract elite and mass consumer audiences alike. Of these, Huaban ("Flower Petal") is more general purpose, but brands will discover a rich ecosystem of beauty, fashion and luxury oriented portals that have broader reach than their Western counterparts.



Question: When did you last make a purchase from these luxury fashion brands? (Within The Past Year) **Source:** GlobalWebIndex 2017-2018 **Base:** 10,015

Brand Advocacy

BRAND ADVOCACY

MOTIVATION TYPE			INDEX
SOCIAL	When something enhances my online reputation/status	23%	1.77
INCENTIVIZED	Access to exclusive content or services (e.g. music, videos, etc)	24%	1.47
PERSONAL	When I have a personal/one-on-one relationship with a brand	24%	1.42
PERSONAL	Having insider knowledge about the brand or its products	25%	1.39
SOCIAL	The feeling of taking part/being involved	25%	1.19
SOCIAL	When something is relevant to my friends' interests	23%	1.11
PERSONAL	When I've received great customer service	34%	1.04
PERSONAL	Love for the brand	34%	1.02
PERSONAL	High-quality products	45%	0.93
PERSONAL	When something is relevant to my own interests	30%	0.91
INCENTIVIZED	Rewards (e.g. discounts, free gifts, etc)	34%	0.79

Being able to act as an expert is the largest motivation for brand advocacy among global business leaders

Social motivations for brand advocacy are most distinctive for business leaders, though there is a very strong divide between business leaders in Europe and North America. The prospect of enhancing their online reputation is the single largest incentive to advocate for a brand among business leaders.

The popularity of statements such as “having insider knowledge about the brand” or “when something is relevant to my friends’ interests” also rank highly and further underscore the importance of the prestige economy, rather than sheer financial exchange, compared to the general online population. The incentives that do matter are ones that can’t be bought otherwise, so **accessing exclusive content and services outperforms other offer incentives.**

Financial incentives are less effective than exclusivity. For all audiences outside the Middle-East and Africa, having high quality products is less persuasive on its own with this audience, as are good customer services. **There’s less appetite for expressing a purely personal opinion:** love for the brand, its products or services, doesn’t motivate nearly as much as the social side.



Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Q2 2018 | **Base:** 10,015 Global Business Leaders

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 Q3 2017, Q4 2017, Q1 2018, and Q2 2018 wave of research across the following markets, with a global sample of 340,015 respondents.

	Business Leaders			Business Leaders	
	TOTAL		TOTAL		
Argentina	1559	102	Netherlands	1279	45
Australia	2282	104	New Zealand	1275	45
Austria	1280	28	Philippines	1577	25
Belgium	1266	27	Poland	1816	85
Brazil	2345	328	Portugal	1283	43
Canada	2268	236	Russia	2279	118
China	15361	1577	Saudi Arabia	1487	267
Colombia	1301	28	Singapore	2496	262
Denmark	1334	15	South Africa	1528	61
Egypt	1771	235	South Korea	1270	87
France	3323	133	Spain	2784	155
Germany	2846	144	Sweden	1274	63
Hong Kong	1766	112	Switzerland	1261	39
India	4138	832	Taiwan	1796	57
Indonesia	1788	98	Thailand	1538	75
Ireland	1247	25	Turkey	1577	265
Italy	2807	152	UAE	1768	156
Japan	1804	61	UK	7709	698
Malaysia	1556	91	USA	15637	2758
Mexico	2605	322	Vietnam	1618	61

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

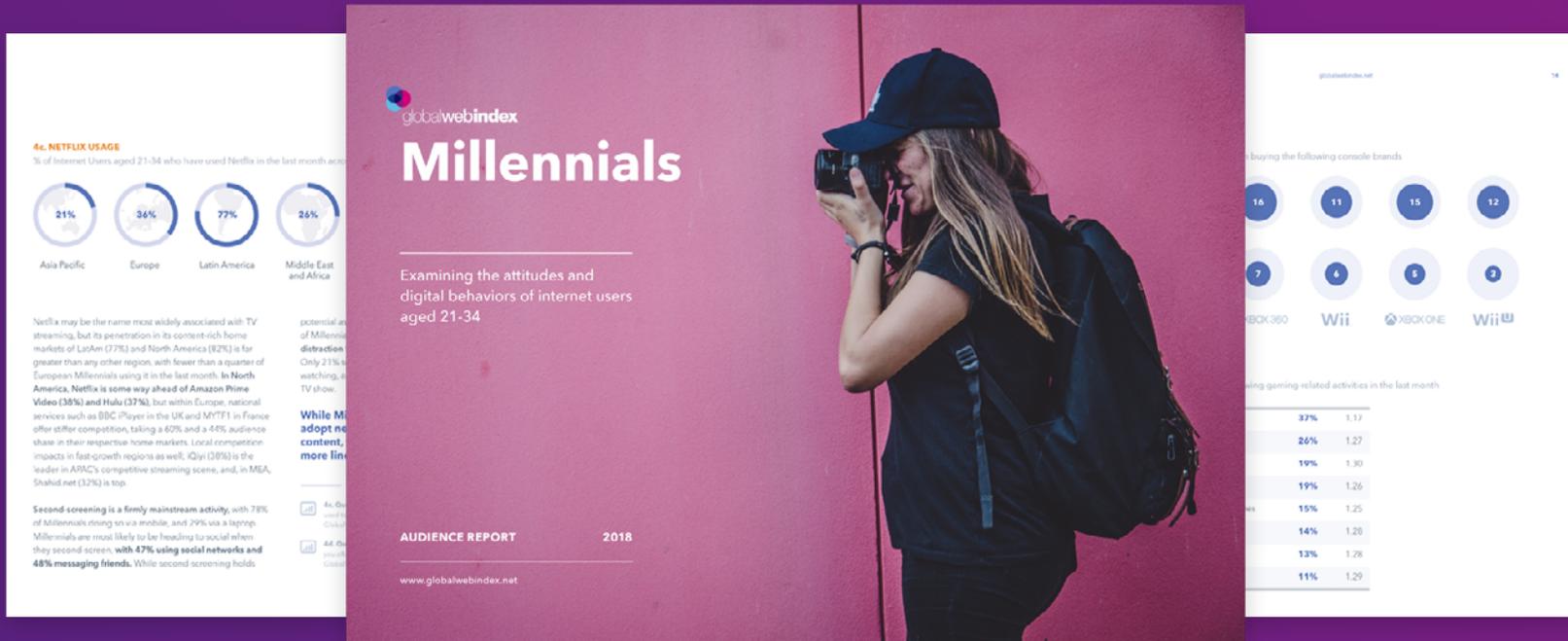
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

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

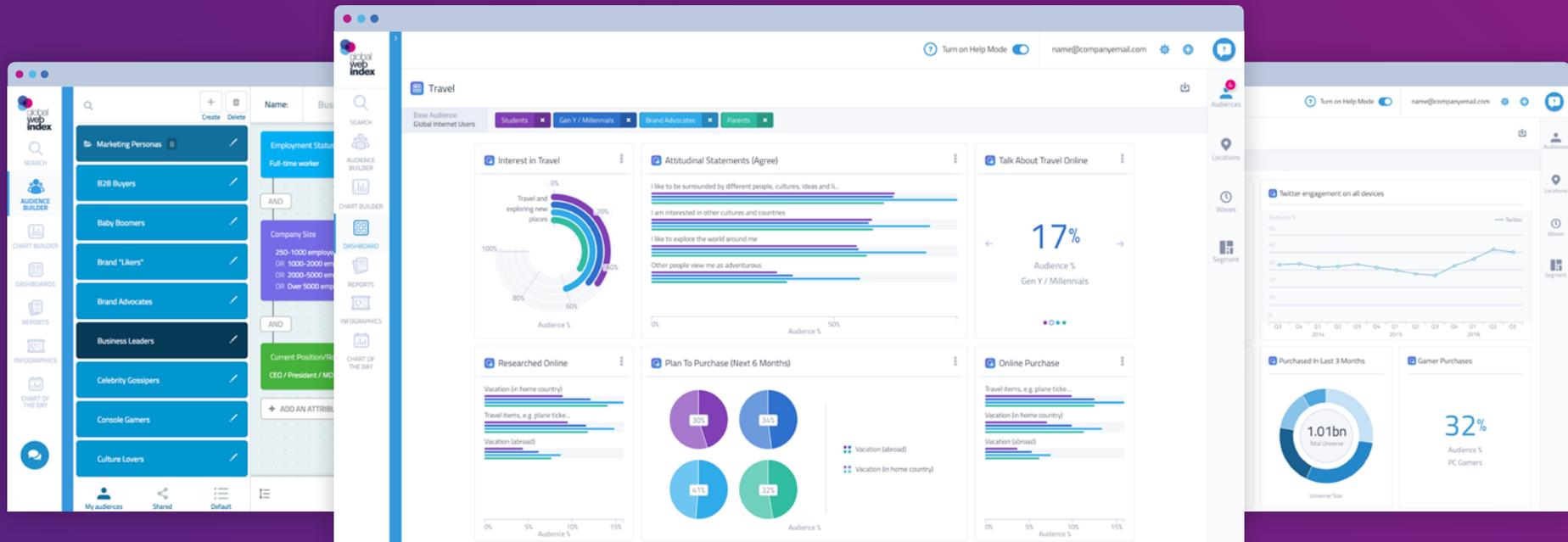
Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%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