# GWI Core: Research & methodology



GWI.

# Your step by step guide to how we collect our data

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# **Key numbers**



52
markets

2.7bn
internet users represented

Learn more





4.7m total sample to date

**57,000** profiling points

950,000 total annual sample

4,000 brands covered

# Introducing GWI Core

GWI Core is our flagship data set on the attitudes and behaviors of online consumers.

Launched as an annual survey in 2009, it ran bi-annually throughout 2010-2012 and has been running quarterly since 2013.

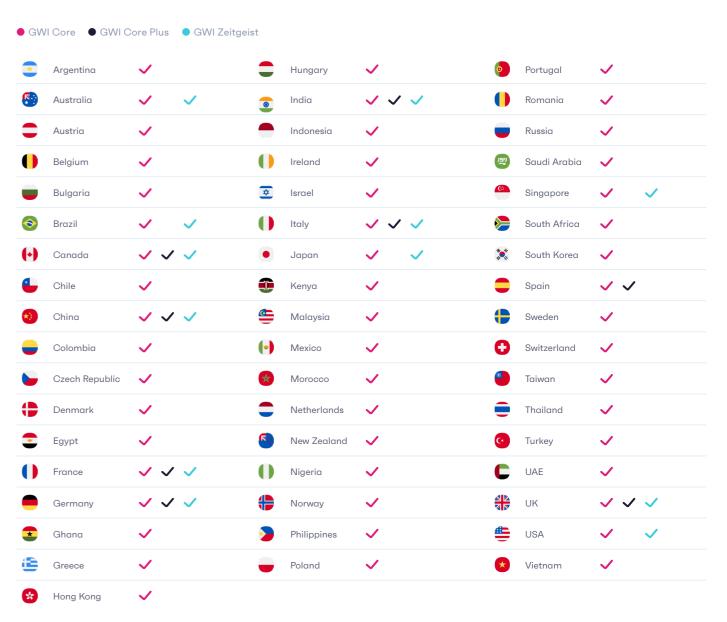
Originally fielded in 16 markets, it has grown almost every year since and now features over 50 markets.

Already our most expansive data set, GWI Core is now supported by two free add-ons:

**GWI Zeitgeist** - a monthly survey exploring the most pressing topics of the day.

**GWI Core Plus** - a biannual study featuring additional categories and brands across a selection of markets.

#### We cover 50+ markets



We offer a co-launch option for new markets. For more information please contact your account manager.

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### **GWI Core market coverage**

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### Markets added every year



See <u>appendix</u> for a full list of sample sizes by market by year.

# Representing audiences accurately



### GWI Core represents internet users aged 16-64

### Why internet users?

We represent online populations - not national populations - because all of our surveys are fielded online. People who don't use the internet are often very different to those who do, so we don't seek to represent these people in our data sets.

### What does this mean for our data?

As the percentage of people with internet access varies globally (see the appendix for full table), the online population may look very different from one country to the next. For example, if 99% of people in a given country use the internet (the "internet penetration rate"), the online population will resemble the national population. If, on the other hand, only 50% of people use the internet, the online population will look very different to the national population. In most cases, the online population will be younger and more affluent, educated and urban than the national average.

#### Why 16-64 year olds?

We don't survey people aged 15 and under as parental consent would be needed and many of the questions we ask wouldn't be relevant or suitable for children to answer. Instead, we run a survey called GWI Kids, which looks specifically at internet users aged 8-15.

We don't survey people aged **65+** because lower internet penetration rates among this group make it challenging to find enough respondents in emerging markets. As GWI Core is designed to be harmonized across all markets, we set an upper age limit.

## Making our data representative involves a number of steps

### Step 1: Setting accurate quotas

In most markets, we set quotas on recruit respondents from a good mix age, gender and educational attainment. For example, if 10% of the online population in a given country was comprised of women aged 25-34, we'd ensure that 10% of our sample was from this group. This is an example of a quota.

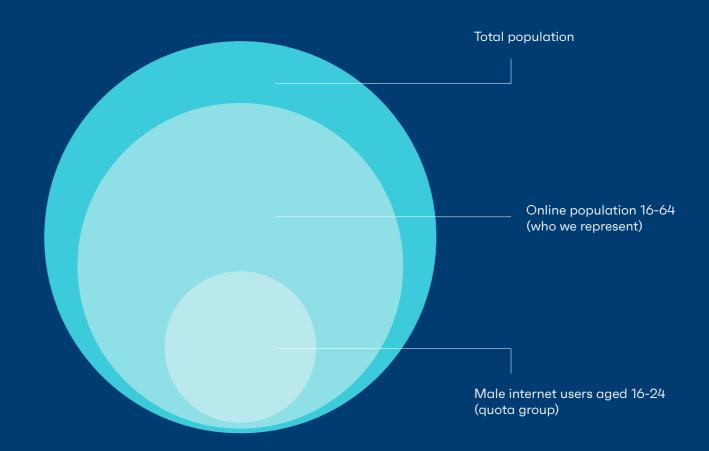
Some studies set auotas on other criteria, such as income, region and ethnicity. Because this information about a country's online population isn't always readily available or accurate, we stick to age, gender and education in most countries, with education acting as a proxy for income. Overall, we find that this approach allows us to

of backgrounds.

### How do we know what the online population in each country looks like?

We use a range of international and national sources (including the World Bank, the UN Population Division, the OECD, Eurostat, government departments and national statistics sources) to inform our auotas. When recent data isn't available, we examine past trends and generate forecasts for the current year. For a detailed breakdown of this calculation, see the appendix.

### In most markets, we set quotas on age, gender and educational attainment





# Step 2: Recruiting the right respondents

Once we know who we need to recruit to achieve a representative sample, we instruct our panel partners accordingly. Our panel partners are experts at recruiting and managing large panels of respondents. In each market, we typically work with 2-5 panel partners at any given time.

Our panel partners each have their own approach to incentivizing respondents to take part in studies like ours. This could include:

- Monetary payments
- Loyalty points
- Vouchers
- Charity donations
- ✓ Competition/sweepstake entry

These incentives are designed to appeal to people of all backgrounds, and will sometimes vary between demographic groups within a particular country. To find out more about our panel partners and respondents, check out this Help Center article.

### Reaching mobile-first respondents

But it's not all down to our panel partners. Recruiting the right respondents means keeping our surveys accessible, and we do this by making them as mobile-friendly as possible. Until 2016, the GWI Core survey could only be taken on computers and tablets. From 2017, we've been fielding a mobile version of the survey in parallel to the main survey. The mobile survey contains fewer questions in a format optimized for smaller screens. This helps us reach a more diverse range of internet users globally, but particlarly in emerging markets, where many internet users are mobile-first and significant

minorities might be mobile-only. In Ghana, Kenya, Morocco and Nigeria, we only run the mobile version of the survey. In all other markets, the mobile survey is run alongside the main survey and the results are combined and presented as a single data set in our platform.

### Speaking to respondents in their own language

Respondents complete our surveys in their local language. In most markets, this will be the dominant language for that market, but in more linguistically diverse markets, such as Malaysia, we offer multiple languages. A full list can be found in the appendix. To ensure our surveys are translated accurately, we work with expert translation agencies and double check each translation.

### Step 3: Weighting our data accurately

We assign a "weight" to every respondent. In most markets, this is based on their age, gender and education profile. For example, we might know that a female respondent aged 16-24 represents 10,000 similar individuals in a given country. So, each time that respondent selects an option, the corresponding universe size for that option is increased by 10,000.

This is what then gives us the **universe figure** seen in our platform:

Add an attribute +			Data point %	Universe	Responses	Audience %
Which of the following do you feel describes you?						
Adventurous Describes me	⚠	:	100%	948.86M	318.28k	34.8%
Affluent Describes me	⚠	:	100%	432.75M	113.9k	15.8%
Ambitious Describes me	⚠	:	100%	893.91M	301.21k	32.7%
Career-focused Describes me	⚠	:	100%	1.04B	294.38k	38%

The average weight applied to or weights are particularly imporeach respondent varies by country, and is largely defined by the size of population being represented. In other words, countries with smaller samples but big populations will need higher weights.

Check out the appendix for a full breakdown of average weight by country.

### What if additional quotas or weights are needed?

When the make-up of the population means that additional quotas

tant for understanding audiences, we adjust our approach accordingly. the sample and the size of the In the USA, we set quotas on age, gender, race and ethnicity, income and region, and weight by the same criteria (except for region). We use the same approach in GWI USA - our separate data set focussed on today's America. In the UAE, we set quotas on nationality, while in Saudi Arabia we've developed a specific weighting framework featuring interlocking age, gender and nationality quotas.

> To find out more about our quotas and weights, check out this Help Center article.

# Keeping our data clean

All of our respondents are pre-screened for quality by their respective panel. We also run stringent testing both during and after fieldwork to ensure a high-quality and robust sample.

This includes:

### Checking completion times

We know how long it takes to complete our surveys. If someone gets to the end too fast, we know they're unlikely to have responded accurately, so we remove them.

### Looking for patterned answers and straight-liners

We look for respondents who answer questions in a uniform

fashion, such as by selecting all items in a list or the same option in each row of a grid. If they do this just once, we'll check their response to see if it's plausible (e.g. if they really could have done all of the activities in a list). If they do it multiple times, we'll remove them.

### Detecting multiple "None of the above" answers

In line with standard research practice, most behavioral questions (e.g. "Have you done the following?") include a "none of the above" option at the end. If someone selects this option too frequently, we'll review their answers to make sure

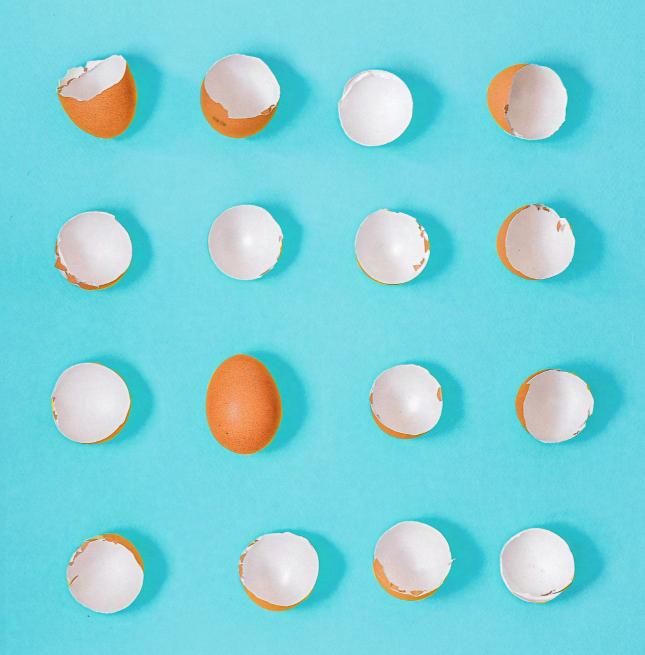
they aren't answering in a superficial manner.

### Including logic traps

We check to see if respondents' answers are consistent across a number of questions where poor-quality respondents could contradict themselves. For instance, if a respondent tells us that they're 16 years old and have a PhD, we'll review their answers.

### 3x rule

Respondents who're identified as being potentially suspicious on three or more criteria are automatically removed without any further consideration.



# Providing a 360-degree view

### Our add-ons provide further depth to GWI Core

GWI Core is only part of our data ecosystem. Since 2019, we've launched a number of add-ons which use GWI Core as their foundation but explore a particular subject area in greater depth.

Our free add-ons can be compared directly with GWI Core, while our sector-specific add-ons (in light-blue) have compatible questions appended to their respective taxonomies.

explore a particular subject area in Find out more about how this works greater depth. Find out more about how this works on our Help Center.



Free add-ons

**GWI Core Plus, GWI Zeitgeist,** and **GWI Travel** represent internet users aged 16-64, just like GWI Core. GWI Work, GWI Gaming and GWI Sports represent business professionals, gamers, and sports fans respectively. As such, we recontact people based on certain information we know about them from their answers to the Core survey.

Add-ons

Primary data sets



Click on the dots to learn more about our data sets

### We use a recontact methodology to cover more topics than one survey would allow

GWI Core is powered by multiple surveys. The first is the main survey - everyone completes it or covers key questions on demogradevice ownership.

Then there's the brand & media module - a recontact module completed by approximately half of the main survey sample. It focuses on, you guessed it, brand and media engagement.

- each of which are based on an with another.

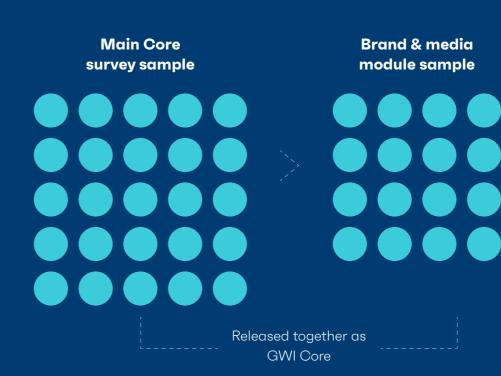
additional survey completed by a subset of respondents who've completed both the main survey and the brand & media module.

Results from each section are weighted to represent the relevant its mobile-friendly equivalent. It overall universe (in most cases, internet users aged 16-64) and can be used phics, attitudes, internet usage and in conjunction with each other in our platform, giving your analysis both breadth and depth.

This approach means we're able to give you lots of data without exhausting our respondents with excessively long surveys, or compromising the ability to compare Finally, there's GWI Core's add-ons questions from one section

Respondents from each add-on are recontacted from our Core sample. This means they've already completed both the main core survey and the brand & media module.

This means you can compare questions from each add-on with those from Core, giving your analysis depth and breadth.



Released separately as GWI Sports/ GWI Gaming

Add-on

sample

# GWI Custom: Going bespoke to get the exact insights you need



We can conduct custom research on your behalf in two ways:

### **Recontacting from Core**

We can recontact participants who completed Core and ask them specific questions defined by you. As this is a recontact, you can combine your custom insights with existing data points from Core.

### Fresh sample

We can also conduct fresh sample research in over 100 countries, regardless of whether they're featured in Core or not. You'll be able to access this data in our platform and use it with all the same features as our syndicated data, such as charts, crosstabs and dashboards.

### Measuring digital impact

Thanks to our tagged online content we can help you measure the impact of digital advertising and website visits including:

- cific questions defined by you. As this

  Measuring the effectiveness of is a recontact, you can combine your online campaigns
  - Incorporating Opportunity To See (OTS) modeling for cross platform campaigns
  - Evaluating online campaign targeting using 57,000 profiling points from GWI Core
  - Understanding the profile of a website's visitation audience with GWI Core profiling points

For more information on any of the above please contact your account manager.

## **Appendix**

### Universe size

To explain how we calculate the universe size for each of our Core markets, let's take the UK as an example. According to UN estimates there are 42.62 million people aged 16-64 in the UK. Here you can see this figure broken down by age group:

	16-24	25-34	35-44	45-54	55-64
Male	3,538,624	4,590,973	4,534,688	4,324,085	4,294,865
Female	3,406,364	4,484,123	4,576,059	4,418,274	4,455,431

Using data from the Office for National Statistics, we can then find the percentage of each of these groups who use the internet (via any device):

	16-24	25-34	35-44	45-54	55-64	
Male	100%	100%	100%	99%	98%	
Female	100%	100%	100%	99%	98%	

By multiplying these two data sets together, we know that over 99% of 16-64s in the UK are internet users. This equates to 42.36 million people.

### **Survey language**

	First language	Secondary languages			First language	Secondary languages
Argentina	Latin American Spanish		<u></u>	Malaysia	American English	Malay, Mandarin
Australia	American English		<b>(•)</b>	Mexico	Latin American Spanish	
Austria	German		*	Morocco	Arabic	French
Belgium	Flemish	Belgian French		Netherlands	Dutch	
Brazil	Brazilian Portuguese		<b>(</b>	New Zealand	American English	
Bulgaria	Bulgarian			Nigeria	American English	
Canada	American English	Canadian French	#	Norway	Norwegian	
Chile	Latin American Spanish			Philippines	American English	Tagalog
China	Mandarin			Poland	Polish	
Colombia	Latin American Spanish		•	Portugal	Portuguese	
Czech Republic	Czech		0	Romania	Romanian	
Denmark	Danish			Russia	Russian	
Egypt	American English	Arabic	(let	Saudi Arabia	American English	Arabic
France	French		(6)	Singapore	American English	
Germany	German		<b>&gt;</b>	South Africa	American English	
Ghana	American English			South Korea	Korean	
Greece	Greek			Spain	Spanish	
Hong Kong	American English	Cantonese		Sweden	Swedish	
Hungary	Hungarian		0	Switzerland	French	German, Italian
India	American English	Hindi		Taiwan	Taiwanese Mandarin Chinese	
Indonesia	Indonesian		•	Thailand	Thai	
Ireland	American English		C•	Turkey	Turkish	
Israel	Arabic	Hebrew	C	UAE	American English	Arabic
Italy	Italian			UK	American English	
Japan	Japanese		<u>#</u>	USA	American English	Latin American Spanish
Kenya	American English		*	Vietnam	Vietnamese	

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### Annual sample sizes

urope	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Current
L UK	4,000	25,000	30,000	30,000	30,000	30,000	33,000	40,000	40,000	40,000	40,000	40,000
France	2,000	4,000	4,000	8,000	8,000	9,000	15,000	20,000	20,000	31,000	40,000	40,000
Germany	2,000	4,000	4,000	8,000	8,000	9,000	13,000	20,000	20,000	31,000	40,000	40,000
Italy	2,000	4,000	4,000	8,000	8,000	9,000	13,000	20,000	20,000	26,000	40,000	40,000
Netherlands	1,500	3,000	3,000	3,000	3,000	5,000	5,000	5,000	5,000	5,000	10,000	10,000
Russia	2,500	5,000	5,000	5,000	5,000	9,000	9,000	11,000	14,000	16,000	16,500	16,500
Spain	2,000	4,000	4,000	8,000	8,000	9,000	13,000	20,000	20,000	31,000	40,000	40,000
Poland	1,500	3,000	3,000	3,000	3,000	5,000	7,000	7,000	8,000	9,000	12,000	12,000
Sweden	1,500	3,000	3,000	3,000	3,000	5,000	5,000	5,000	7,000	10,000	10,000	10,000
Turkey	1,500	3,000	3,000	3,000	3,000	6,000	6,000	7,000	8,000	8,000	8,000	8,000
Ireland	-	2,000	4,000	4,000	4,000	5,000	5,000	5,000	5,000	5,000	5,500	5,500
Belgium	-	-	-	2,000	3,000	5,000	5,000	5,000	5,000	5,500	8,000	8,000
Portugal	-	-	-	2,000	3,000	5,000	5,000	5,000	5,000	5,000	9,000	9,000
Austria	-	-	-	-	-	1,000	5,000	5,000	5,000	5,500	8,000	8,000
Switzerland	-	-	-	-	-	1,000	5,000	5,000	5,000	6,000	6,000	6,000
Denmark	-	-	-	-	-	-	3,000	5,000	5,000	6,000	6,000	6,000
Romania	-	-	-	-	-	-	1,000	5,000	5,000	5,000	5,000	5,000
Greece	-	-	-	-	-	-	-	-	-	5,000	5,000	5,000
Czech Republic	-	-	-	-	-	-	-	-	-	-	5,000	5,000
Norway	-	-	-	-	-	-	-	-	-	-	5,000	5,000
Bulgaria	-	-	-	-	-	-	-	-	-	-	-	5,000
Hungary	-	-	-	-	-	-	-	-	-	-	-	5,000

Am	ericas	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Current
<b>=</b>	USA	4,000	24,500	30,000	30,000	30,000	63,000	72,000	100,000	100,000	100,000	100,000	100,000
<b>(•)</b>	Mexico	1,500	3,000	3,000	3,000	3,000	6,000	10,000	12,000	17,000	17,000	20,000	20,000
<b>(+)</b>	Canada	2,000	4,000	4,000	4,000	6,000	9,000	9,000	11,000	19,000	20,500	25,000	25,000
4	Chile	-	-	-	-	-	-	-	-	-	-	5,000	5,000
	Brazil	2,000	4,000	4,000	4,000	4,000	9,000	9,000	12,000	22,000	22,000	35,000	35,000
•	Argentina	1,500	3,000	3,000	3,000	3,000	6,000	6,000	6,000	6,000	6,000	7,000	7,000
	Colombia	_	-	-	-	-	-	4,000	5,000	7,000	10,000	15,000	15,000

ME	A	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Current
U U U U	Saudi Arabia	1,500	3,000	3,000	3,000	3,000	5,000	5,000	6,000	6,000	6,000	7,000	7,000
	South Africa	1,500	3,000	3,000	3,000	3,000	6,000	6,000	6,000	6,000	6,250	7,000	7,000
C	UAE	1,500	3,000	3,000	3,000	3,000	5,000	7,000	7,000	7,000	7,000	7,000	7,000
•	Egypt	-	-	-	-	750	5,000	7,000	7,000	7,000	7,000	7,000	7,000
*	Ghana	-	-	-	-	-	3,000	4,000	4,000	4,000	4,000	4,000	4,000
•	Kenya	-	-	-	-	-	3,000	4,000	4,000	4,000	4,000	4,000	4,000
*	Morocco	-	-	-	-	-	3,000	4,000	4,000	4,000	4,000	4,000	4,000
0	Nigeria	-	-	-	-	-	3,000	4,000	4,000	4,000	4,000	4,000	4,000
<b>‡</b>	Israel	-	-	-	-	-	-	-	2,500	5,000	6,000	6,000	6,000

PA	C	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Current
	Australia	1,500	3,000	3,000	3,000	3,000	5,000	10,000	16,000	16,000	16,500	30,000	30,000
	China	4,000	8,000	8,000	13,000	22,000	43,000	61,000	70,000	96,000	96,000	96,000	96,000
	India	2,500	5,000	5,000	5,000	6,000	12,000	20,000	35,000	54,000	55,000	58,000	58,000
	Japan	1,500	3,000	3,000	3,000	4,000	7,000	7,000	8,000	14,000	26,000	40,000	40,000
4	South Korea	1,500	3,000	3,000	3,000	3,000	5,000	5,000	5,000	6,000	8,000	9,000	9,000
•	Malaysia	1,500	3,000	3,000	3,000	3,000	6,000	6,000	6,000	10,000	14,000	17,000	17,000
•	Hong Kong	1,500	3,000	3,000	3,000	3,000	5,000	7,000	7,000	7,000	7,000	8,000	8,000
	Indonesia	1,500	3,000	3,000	3,000	3,000	7,000	7,000	10,000	20,000	20,000	25,000	25,000
	Philippines	1,500	3,000	3,000	3,000	3,000	6,000	6,000	8,000	12,000	12,000	15,000	15,000
	Singapore	1,500	3,000	3,000	3,000	3,000	6,000	10,000	10,000	11,000	12,500	13,500	13,500
	Taiwan	1,500	3,000	3,000	3,000	3,000	5,000	7,000	8,000	9,000	9,500	10,500	10,500
	Thailand	1,500	3,000	3,000	3,000	3,000	6,000	6,000	10,000	15,000	15,000	17,500	17,500
•	Vietnam	1,500	3,000	3,000	3,000	3,000	6,000	6,000	8,000	10,000	10,500	12,500	12,500
•	New Zealand	-	-	-	-	750	5,000	5,000	5,000	5,000	5,000	7,500	7,500

### Quarterly sample sizes

rket	Main survey	Mobile survey	Total	Mark	cet	Main survey	Mobile survey	Total
Argentina	1,175	575	1,750	<u></u>	Malaysia	3,050	1,200	4,250
Australia	5,300	2,200	7,500	(•)	Mexico	3,525	1,475	5,000
Austria	1,600	400	2,000	*	Morocco	N/A	1,000	1,000
Belgium	1,600	400	2,000		Netherlands	2,000	500	2,500
Bulgaria	1,000	250	1,250		New Zealand	1,500	375	1,875
Brazil	6,375	2,375	8,750		Nigeria	N/A	1,000	1,000
Canada	4,450	1,800	6,250	#	Norway	1,000	250	1,250
Chile	1000	250	1,250	<b>&gt;</b>	Philippines	2,500	1,250	3,750
China	16,500	7,500	24,000		Poland	2,250	750	3,000
Colombia	2,625	1,125	3,750	•	Portugal	1,800	450	2,250
Czech Republic	1,000	250	1,250		Romania	1,000	250	1,250
Denmark	1,250	250	1,500		Russia	2,950	1,175	4,125
Egypt	1,250	500	1,750	1991)	Saudi Arabia	875	875	1,750
France	7,000	3,000	10,000	( <del>)</del>	Singapore	2,325	1,050	3,375
Germany	7,000	3,000	10,000		South Africa	1,175	575	1,750
Ghana	N/A	1,000	1,000	**	South Korea	1,800	450	2,250
Greece	1,000	250	1,250		Spain	7,000	3,000	10,000
Hong Kong	1,500	500	2,000		Sweden	1,875	625	2,500
Hungary	1,000	250	1,250	0	Switzerland	1,250	250	1,500
India	10,300	4,200	14,500		Taiwan	1,650	975	2,625
Indonesia	4,375	1,875	6,250	•	Thailand	2,625	1,750	4,375
Ireland	1,100	275	1,375	(·	Turkey	1,500	500	2,000
Israel	1,000	500	1,500	C	UAE	1,250	500	1,750
Italy	7,000	3,000	10,000		UK	7,000	3,000	10,000
Japan	6,950	3,050	10,000	<u>#</u>	USA	17,500	7,500	25,000
Kenya	N/A	1,000	1,000	*	Vietnam	2,175	950	3,125

### Internet penetration among 16-64s

•	Argentina	93%	<u></u>	Malaysia	96%
K.	Australia	99%	<b>(•)</b>	Mexico	85%
	Austria	96%	*	Morocco	89%
	Belgium	98%		Netherlands	97%
	Bulgaria	91%		New Zealand	98%
	Brazil	90%	0	Nigeria	70%
<b>(+)</b>	Canada	99%	#	Norway	100%
4	Chile	92%		Philippines	78%
*	China	79%		Poland	95%
	Colombia	83%	0	Portugal	92%
<b>-</b>	Czech Republic	97%	0	Romania	94%
<b>(</b>	Denmark	100%		Russia	97%
•	Egypt	70%	UW!	Saudi Arabia	94%
0	France	97%	(c)	Singapore	99%
	Germany	97%		South Africa	81%
*	Ghana	64%		South Korea	100%
	Greece	92%		Spain	98%
*	Hong Kong	100%		Sweden	99%
	Hungary	96%	0	Switzerland	99%
•	India	48%		Taiwan	97%
	Indonesia	70%	•	Thailand	85%
	Ireland	98%	C•	Turkey	90%
<b>‡</b>	Israel	96%	C	UAE	99%
0	Italy	92%		UK	99%
•	Japan	97%	<b>=</b>	USA	93%
	Kenya	69%	*	Vietnam	78%

The above internet penetration rates for 2023 are based on a range of international and national sources including government departments and national statistics sources. When recent data isn't available, we examine past trends and generate forecasts for the current year. Note that these figures refer to 16-64s specifically, and general population internet penetration rates are usually lower.

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### Average weight per market

Number of internet users represented by a GWI Core respondent (000s)

•	Argentina	14	<u></u>	Malaysia	5
<b>S</b>	Australia	2	<b>(•)</b>	Mexico	14
	Austria	3	*	Morocco	19
0	Belgium	3		Netherlands	4
	Brazil	14		New Zealand	2
	Bulgaria	3		Nigeria	74
<b>(•)</b>	Canada	4	#	Norway	3
4	Chile	30		Philippines	14
*>	China	9		Poland	7
	Colombia	7	•	Portugal	2
<b></b>	Czech Republic	5	0	Romania	8
<b>(</b>	Denmark	2		Russia	20
<b>*</b>	Egypt	23	U.W.	Saudi Arabia	11
0	France	4	(:	Singapore	1
	Germany	5		South Africa	17
*	Ghana	12	**	South Korea	15
	Greece	4		Spain	3
*	Hong Kong	2		Sweden	2
	Hungary	5	0	Switzerland	4
8	India	27		Taiwan	6
	Indonesia	18	•	Thailand	8
	Ireland	2	<b>C</b>	Turkey	24
*	Israel	3		UAE	4
	Italy	3	A A	UK	4
•	Japan	7	<b>#</b>	USA	8
	Kenya	24	*	Vietnam	15



GWI.