GWI DAY

PUBLICIS GROUPE

GWI.

Welcome!

Sophie Barter

VP, Head of Agencies

What’s in here

1. GWI & Publicis
2. Custom success story: ABInBev
3. GWI trends: Retail trends 2023

10 mins break

4. Who wants to be a GWIllionaire?

5 mins break

5. Custom success story: FMCG Category
6. GWI Awards
7. Concluding thoughts

GWI & Publicis

Getting the most out of GWI

Welcome to the ~~new normal~~ other side

Where things (and people)
change by the minute

- I use streaming services daily
- Diversity is important to me
- I only eat vegan food
- I worry about national debt
- I'm always on banking apps
- I prefer online music events
- I'm a big TikTok user
- I don't trust the media
- I buy sustainable fashion only
- Airbnb is my favourite for travel
- I listen to news podcasts lately
- I use online support groups
- I prefer active vacations

2/3

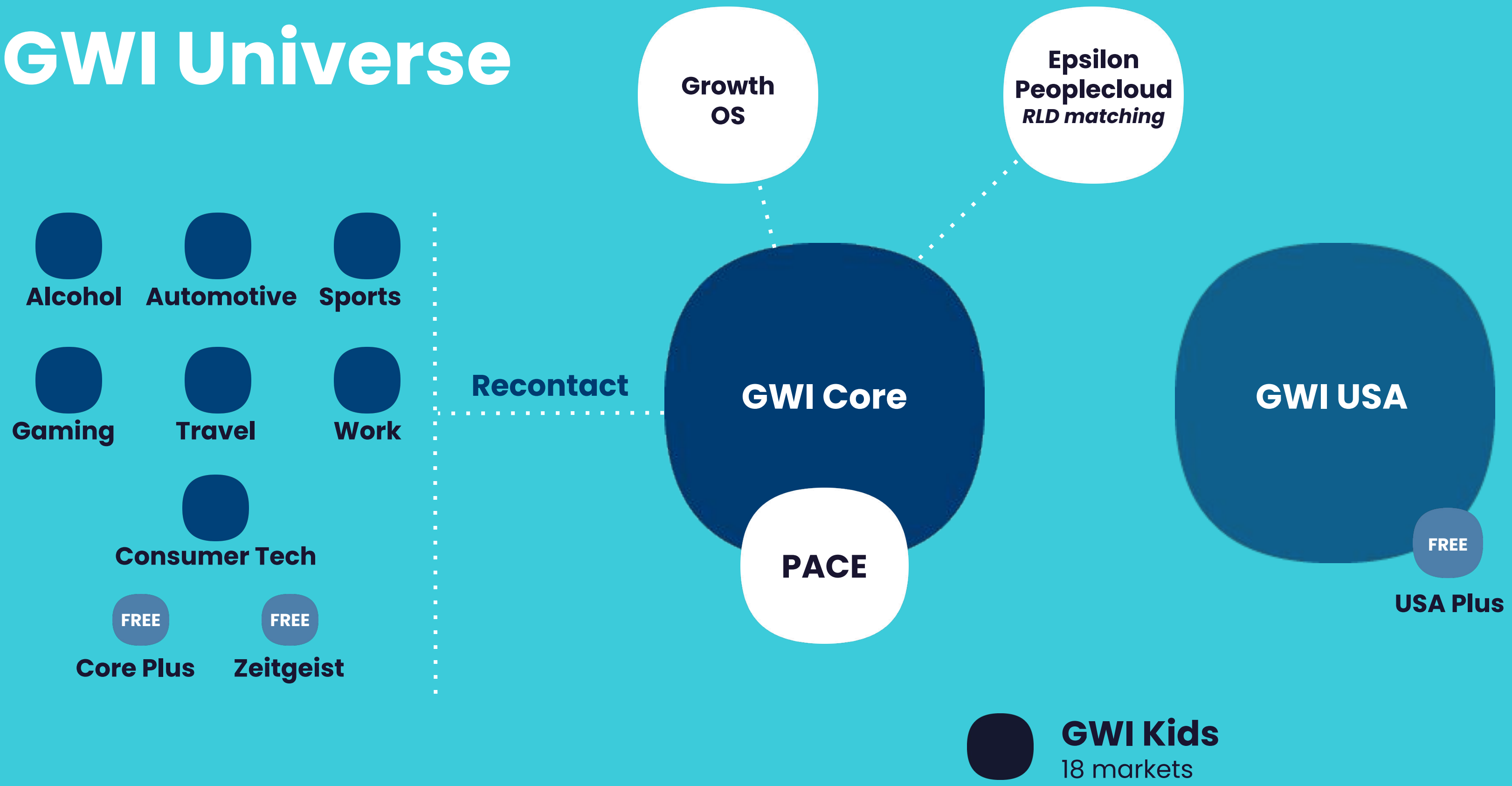
ChatGPT users would consistently use it over a search engine to answer questions

The number of baby boomers who say TikTok is their favorite app has doubled in the last two years

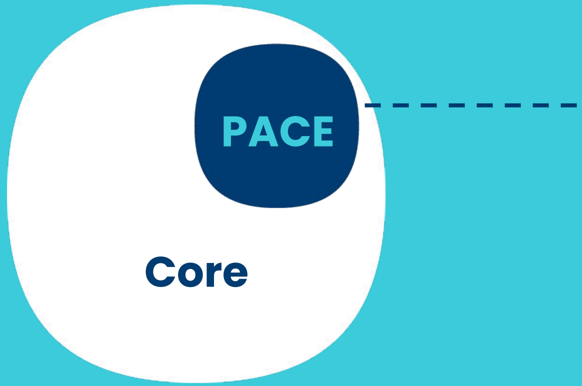
56%

of Gen Z and millennials follow influencers with the same beliefs or values as them

GWI Universe



PACE: Exclusive to Publicis



300,000 interviews

3,500 data points

44 countries

PACE: Topics

Q1 2023

Channel roles & influences

Q2 2023

Receptivity moments

Q4 2023

AI & Future trends

Do whatever you want with GWI Custom

With bespoke surveys to suit your needs

- Concept development and testing
- Purchase journey mapping
- Brand measurement and strategy analysis
- Usage and attitude studies
- Segmentation studies
- Web analytics
- Advertising effectiveness
- Audience profiling
- Audience targeting validation

GWI Custom lite
Helping you gain a competitive advantage

We understand that pitching for new or existing business is becoming more and more competitive.

In this increasingly competitive landscape, it's crucial to respond in a timely and cost-effective manner to put yourself in poll position.

- Test your hypothesis with faster turnaround times and lower prices
- You write the questions you want to asking your audience up to 30 questions
- Harmonize your bespoke data points with our existing GWI Core or USA datasets

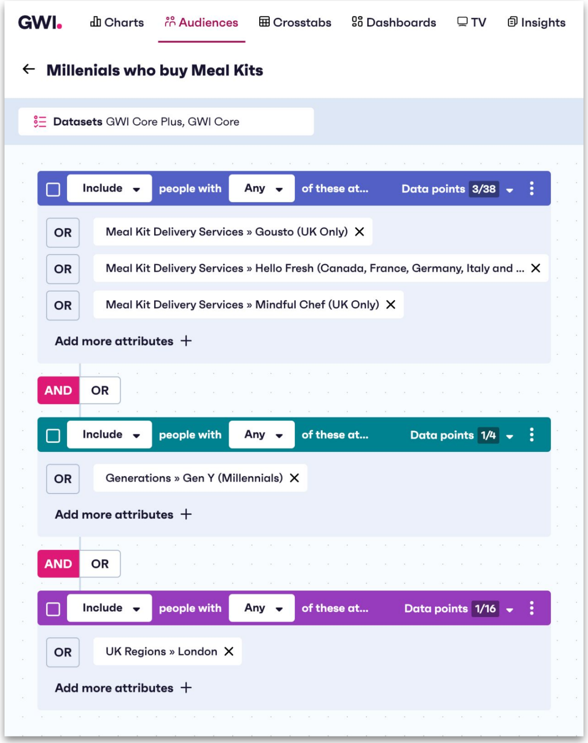
GWI product roadmap sneak peek 👀

Coming soon

Easily understand your audiences

- AI generated natural language description
- Quickly discover any audience details
- Create more accurate and tailored charts
- Copy paste audiences to share easily

Build your audiences



Share your audiences

Audience description

This audience consists of individuals who live in London and belong to Generation Y, and their households have either Gousto, Mindful Chef, or Hello Fresh meal-kit delivery services.

Coming soon

GWI Luxury

- Purchase behaviors and experiences, including online vs. in-store
- Split by categories such as jewelry, watches, clothing, handbags, glasses and fragrances
- Deep dive into second hand luxury products, including purchase motivations and perceptions
- Covering luxury brands loyalty, image, awareness and recommendations

Your expanding GWI team

APAC

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CER ROW

Jim Soscie
Head of Networks US

Christy Civitanova
S. Account Director US

Saskia Casanove
Account Manager, EMEA

Tyler Collins
CS APAC

George Lyons
CS EMEA

Kabya Saikia
CS EMEA

Using GWI Custom

Diving deeper into audiences

Speakers

Lizzy D'Souza

Global Account Director

Archie Munroe

Research Analyst

We also offer bespoke research through our Custom capabilities, allowing you to understand the why behind the trends.

Our bespoke approach Delivers deeper insight

- Choose your target
- Build your survey
- Interview your audience
- Sync your data
- Get expert help
- Additional reporting

Custom: Around the world

Publicis Groupe bespoke study:

AB InBev
Competitive Landscape

Challenges

1

Constant changes

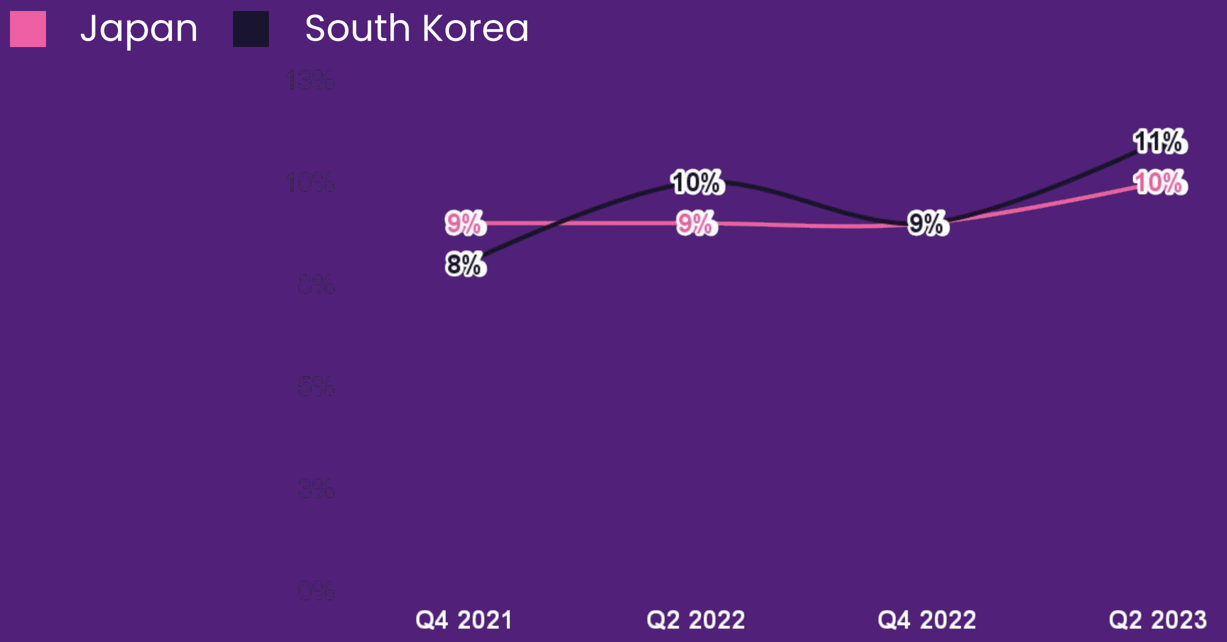
As **new brands** enter the market and threaten to compete, understanding **why** consumers drink from a certain brand and **when** they buy from it is **key** to stay ahead

2

Growing non-alcoholic beer consumption

With a **growing proportion** of legal drinking age consumers opting for non-alcoholic alternatives, the **drivers** behind this was a blind spot

Non-alcoholic beer consumption



"To help understand the evolving beer landscape in Japan and South Korea - **which, where, when, and why** consumers purchase beer brands

Methodology

Recontacted 2000 respondents who had previously taken the GWI Core survey

Japan
1200

South Korea
800

20 mins survey length

Respondents belonged to one of two audiences:

1. Those who have drunk beer **in the last month**
2. Those who have **not** drunk beer in the last month

Alcohol consumption

Beer consumption behaviors

Beer brand deep-dive

Non-alcoholic beer brands

Gifting and brand discovery

Benefits

1

Specific markets

Allowing AB InBev to dive deeper into markets that they **aren't otherwise able to reach**

2

Brand relationships

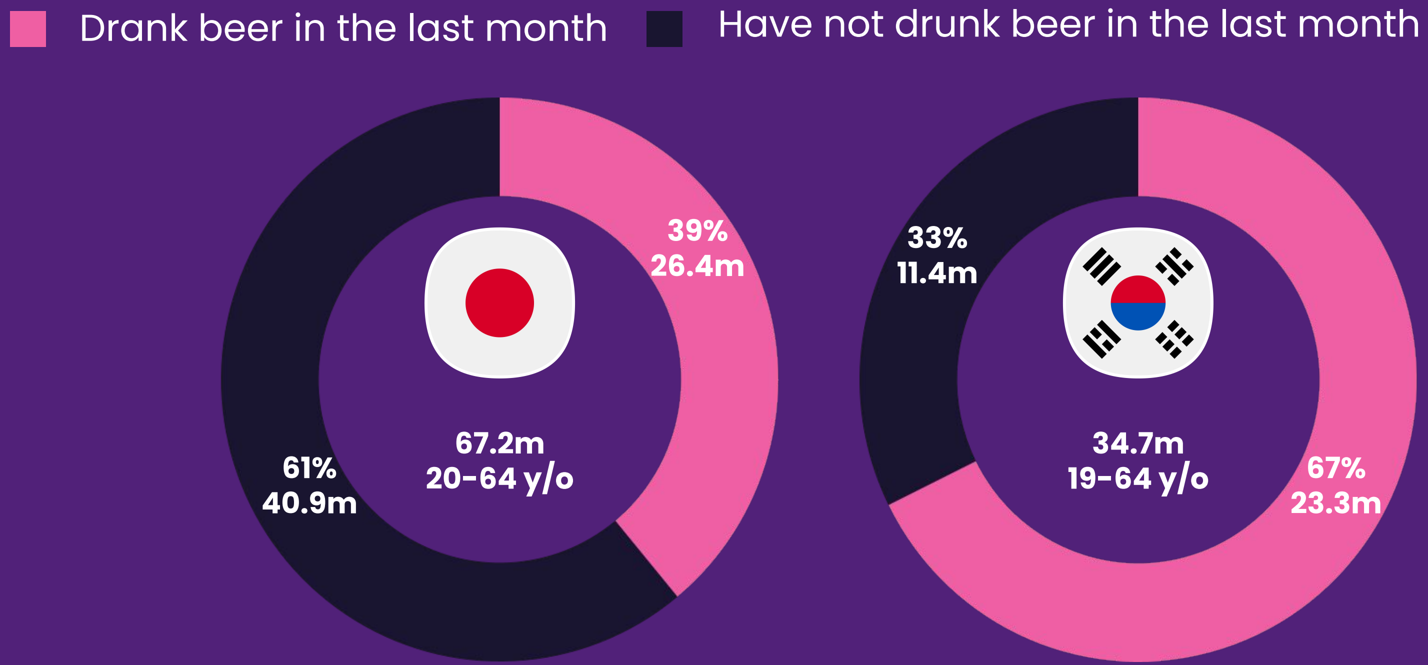
Uncovered important factors in the **purchase journey** including the food types that consumers associate with certain beer brands

3

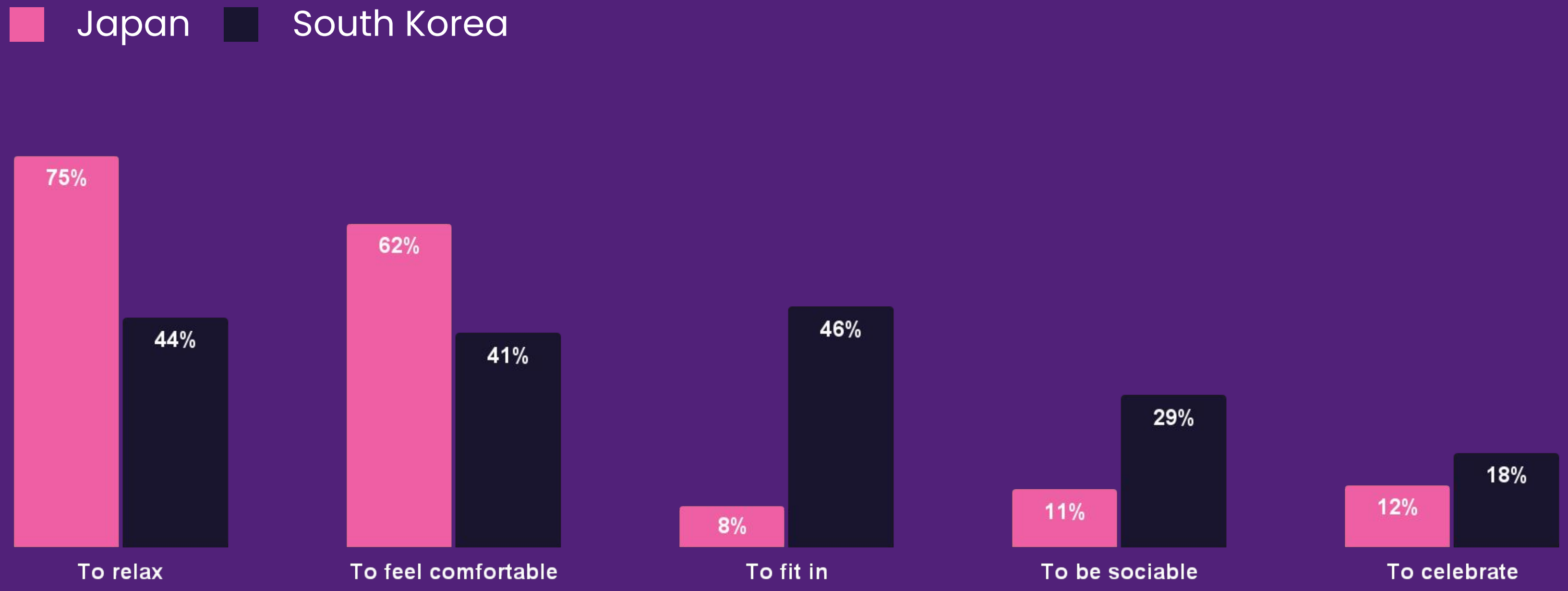
Non-alcoholic drinks

A unique understanding of non-alcoholic beer brands to discover which brands are **leading the way**

Findings - audience sizes



Findings - reasons for drinking



Findings – favorite beer brand

Asahi	**37%**
KIRIN	**21%**
Suntory	**14%**
Yebisu	**10%**
Sapporo	**9%**

Cass	**27%**
Terra	**20%**
Heineken	**9%**
Hoegaarden	**5%**
Guinness	**5%**

Outcomes

1

Competitor analysis

With **45** beer and non-alcoholic beer brands tracked, we're able to dive into **who** consumes each brand and **why**

2

Content strategy

Understanding what **values** consumers associate with each brand and how they **discover new brands** to navigate the evolving industry

3

Purchase touchpoints

Improved knowledge of the **key occasions** and **locations** in which consumers purchase certain brands as well as what causes them to purchase from a **competitor** instead

GWI trends

E-commerce: you are what you buy

You are what you buy

Retail trends in 2023

GWI.

Sun Jo Ling

Senior Trends Analyst

We offer the world's largest study on the digital consumer

52
markets

950K+
interviews per year

2.7bn
internet users represented

01

How people buy

Buying journeys

More are going social for their shopping needs

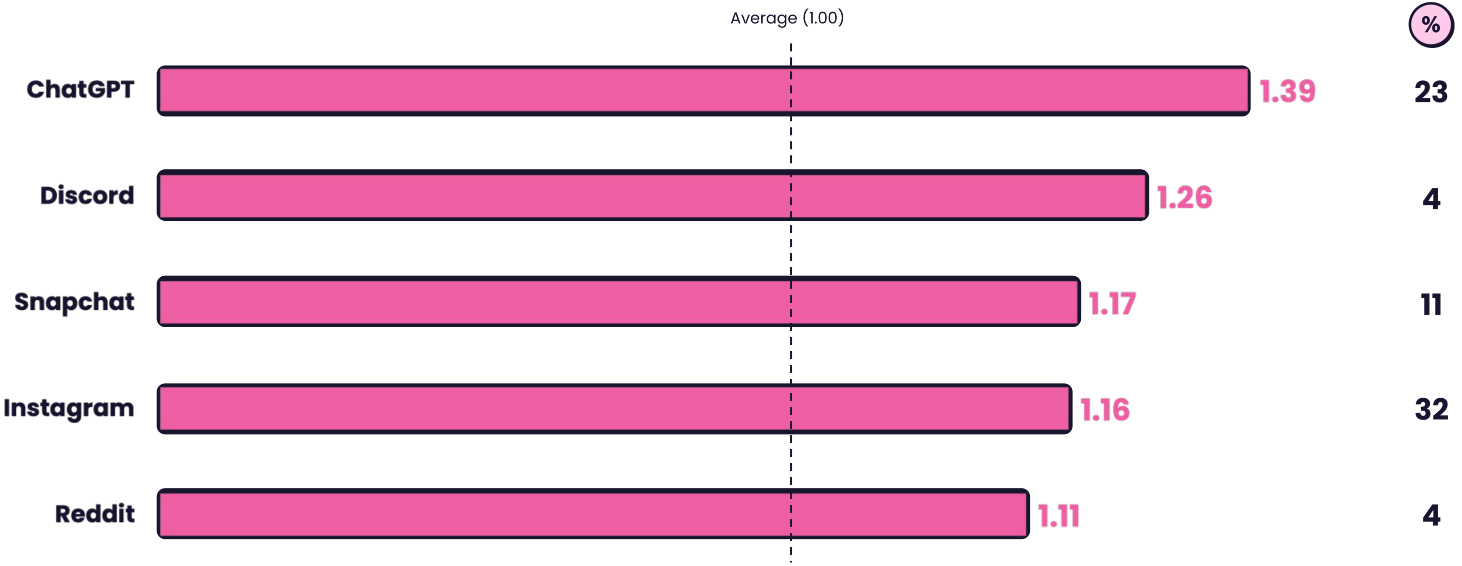
Rank based on the % who say the following are important reasons for using social media

Q2 2021		Q2 2023
Keeping in touch with friends/family	1	Keeping in touch with friends/family
Filling spare time	2	Filling spare time
Reading news stories	3	Seeing what's trending
Seeing what's trending	4	Reading news stories
Finding content	5	Finding content
Finding inspiration for things	6	**Finding products to purchase**
Finding products to purchase	7	Finding inspiration for things
Watching live streams	8	Watching live streams
Sharing/discussing opinions with others	9	Sharing/discussing opinions with others
Making new contacts	10	**Seeing content from your favorite brands**

Source: GWI Core Q2 2021 & Q2 2023

There's even more competition for search

Standout online search platforms Gen Z outside China say they use, sorted by top over-index



Source: GWI Zeitgeist May 2023

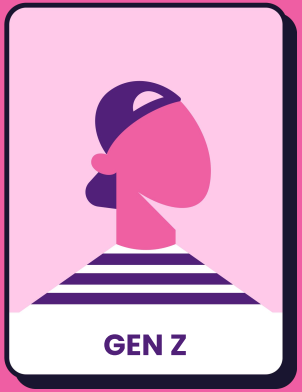
53%

of millennials say they're comfortable using an AI integrated tool to buy a product/service

And older generations are tapping in

Change in **daily time spent** on social media between Q2 2021 & Q2 2023

-11 mins



-5 mins

+0 mins

+14 mins

Source: GWI Core Q2 2021 & Q2 2023

02

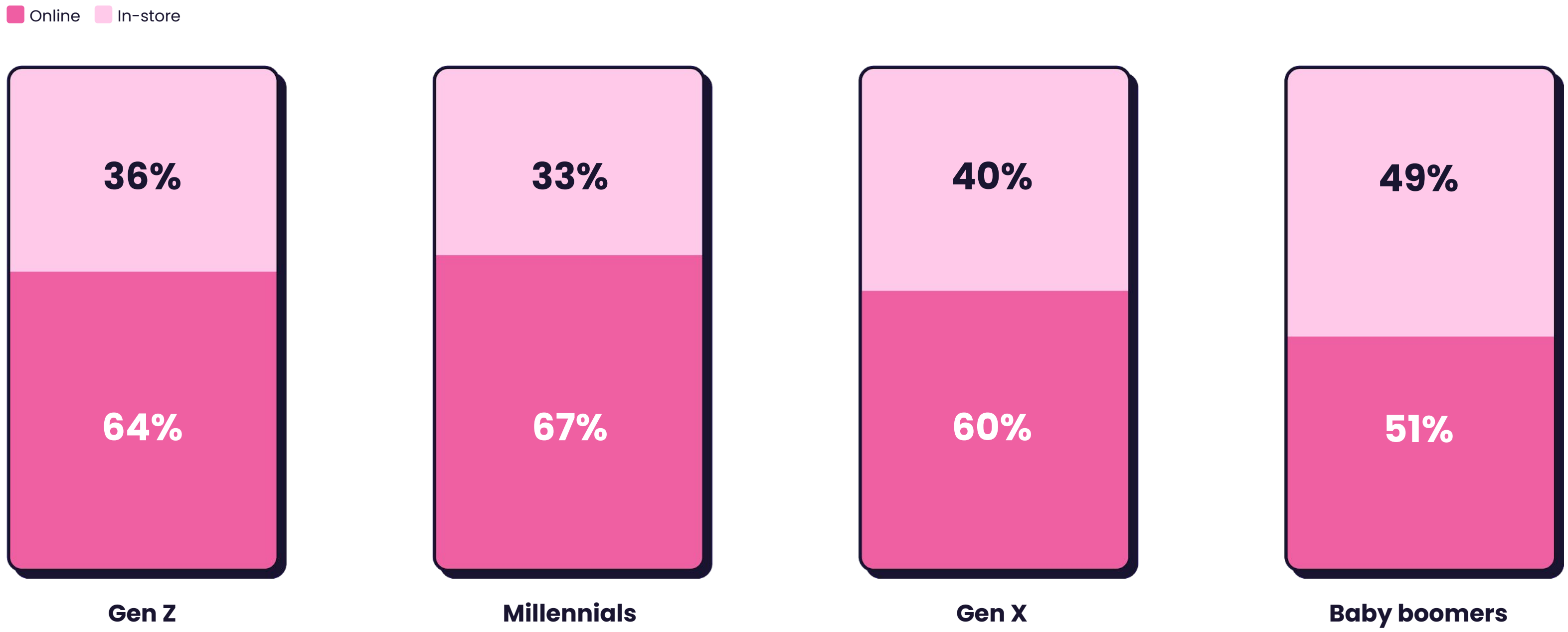
Where people buy

Online vs. in-store

63% of APAC consumers say they'd rather shop online than in-store

Finding the right balance

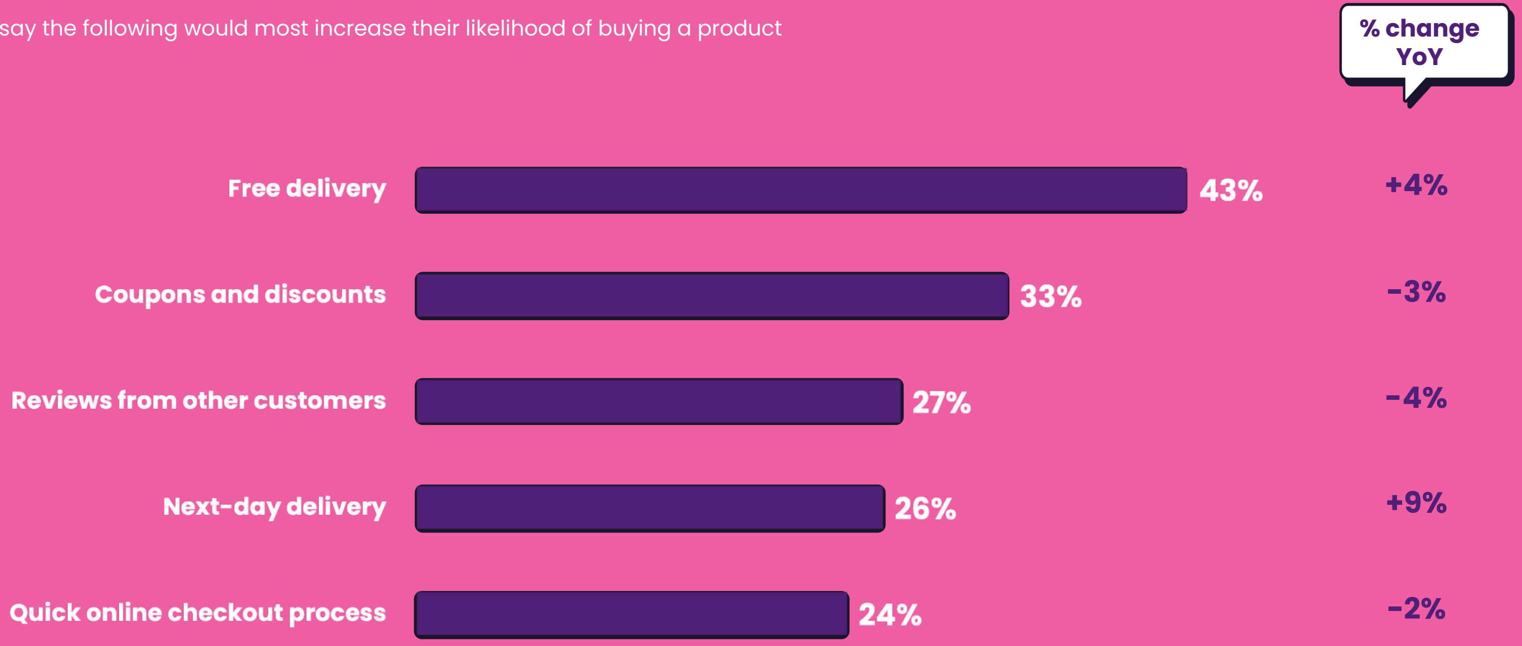
% who say they'd rather shop in-store/online, by generation



Source: GWI Core Q2 2023

What drives people to buy

% who say the following would most increase their likelihood of buying a product



Source: GWI Core Q2 2022 & Q2 2023

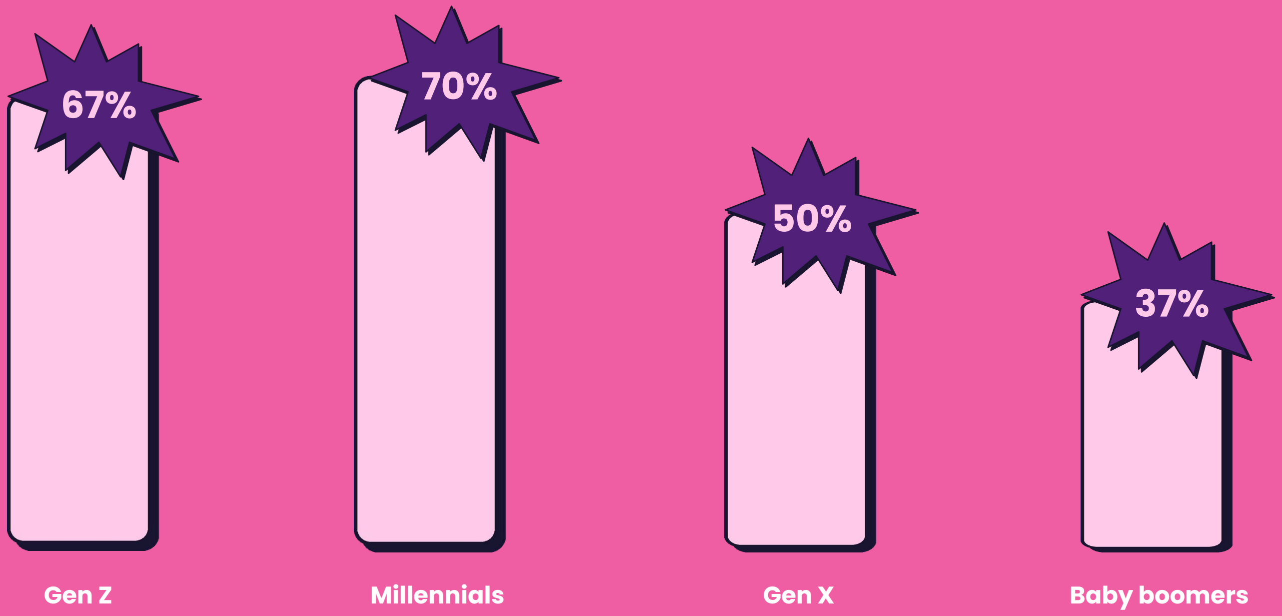
03

Why people buy

The psychology of shopping

Retail therapy: the real picture

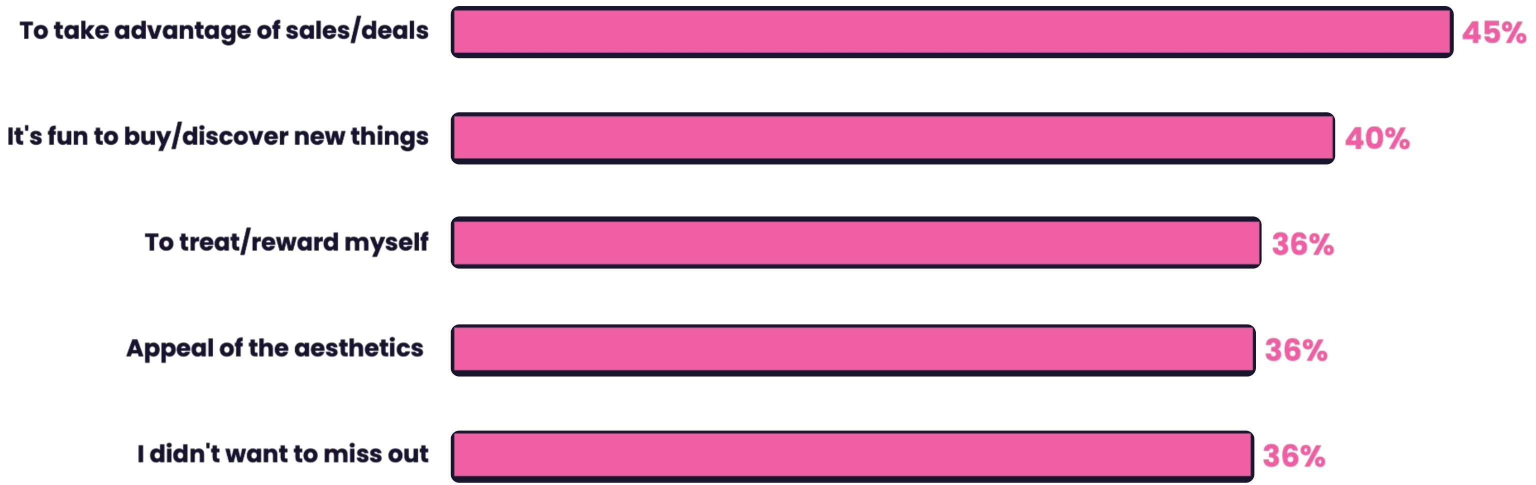
% of who say they make impulse purchase at least once a month



Source: GWI Zeitgeist August 2022

Mood-boosting treats for the win

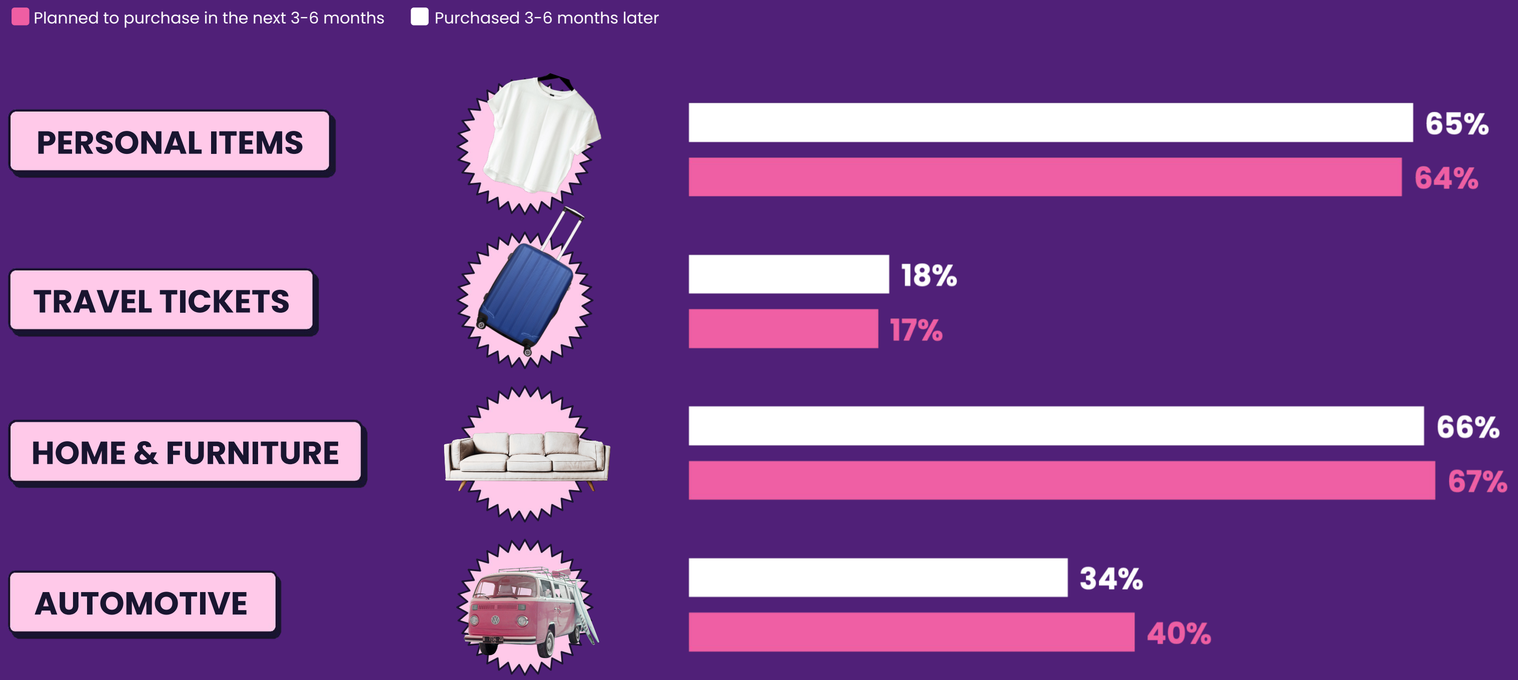
% of impulse purchasers who say they make impulse buys for the following reasons



Source: GWI Zeitgeist August 2022

What are the hot ticket impulse buys?

% who planned to buy the following products in the next 3-6 months vs those who said they followed through



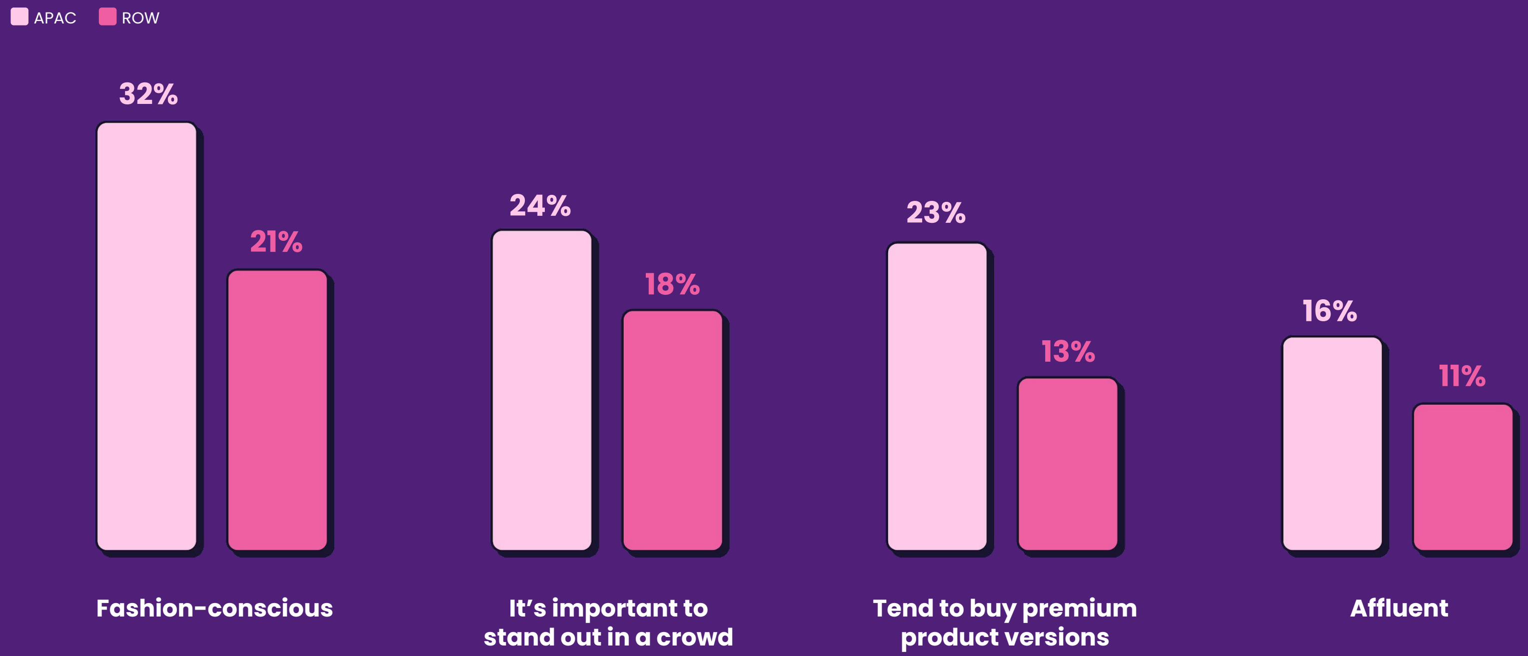
Source: GWI Core Q1 2023 & Q2 2023

Spotlight on

Luxury in APAC

Consumers in APAC are more fashion-conscious

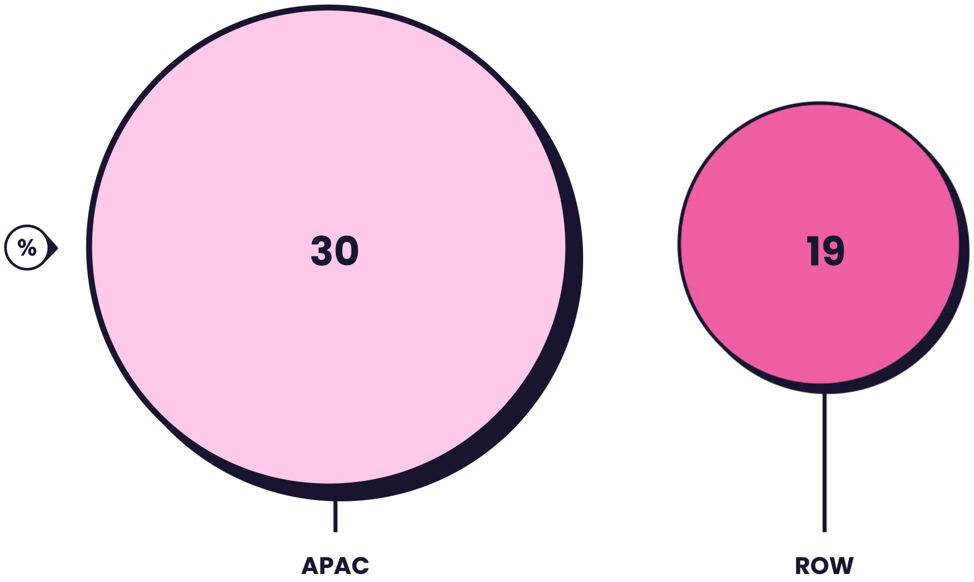
% of those in APAC who see themselves as the following, compared to the rest of the world (ROW)



Source: GWI Core Q2 2023

APAC leads for luxury purchases...

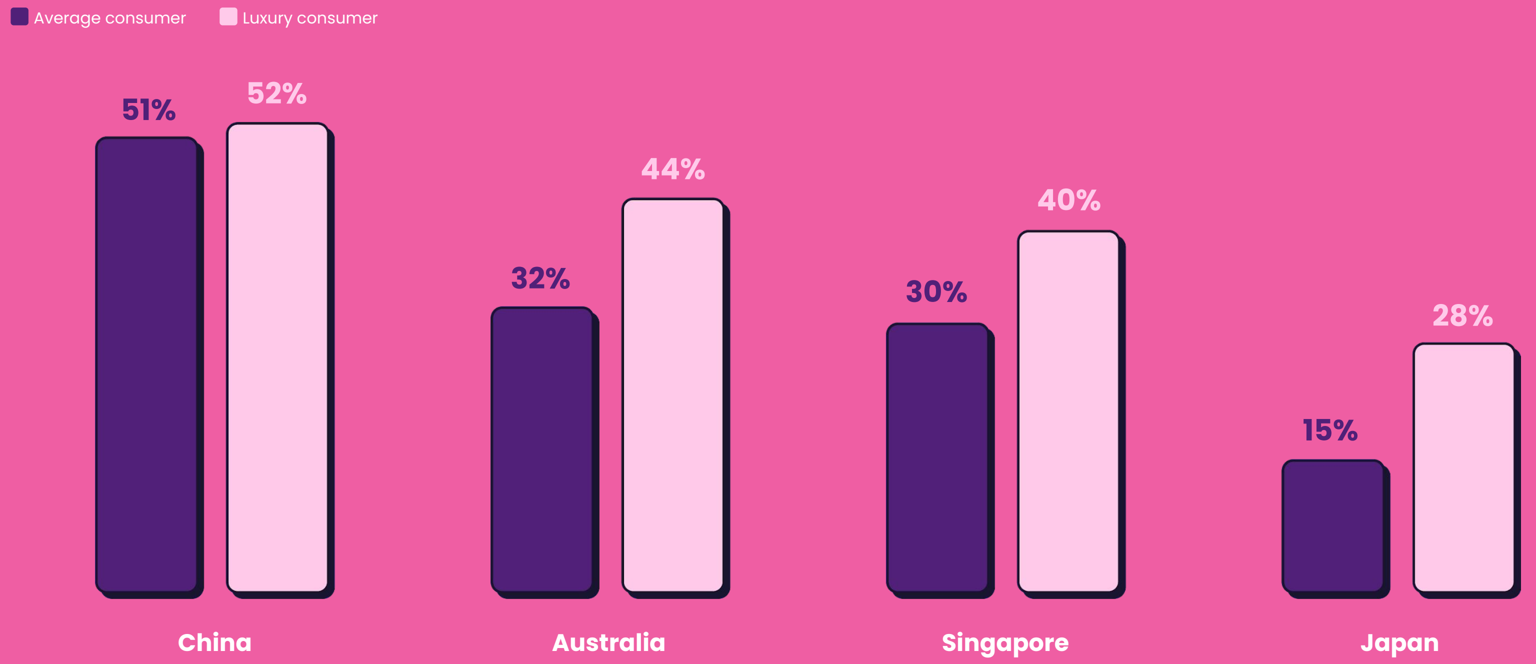
% in 4 APAC markets who say they've purchased a luxury product in the last few months, compared to the average outside of APAC



Source: GWI Zeitgeist July 2023

...but striving for high-end is also fueling dupe culture

% of consumers, and luxury clothing buyers in 4 APAC markets, who say they've purchased a fake/duplicate product in the last year

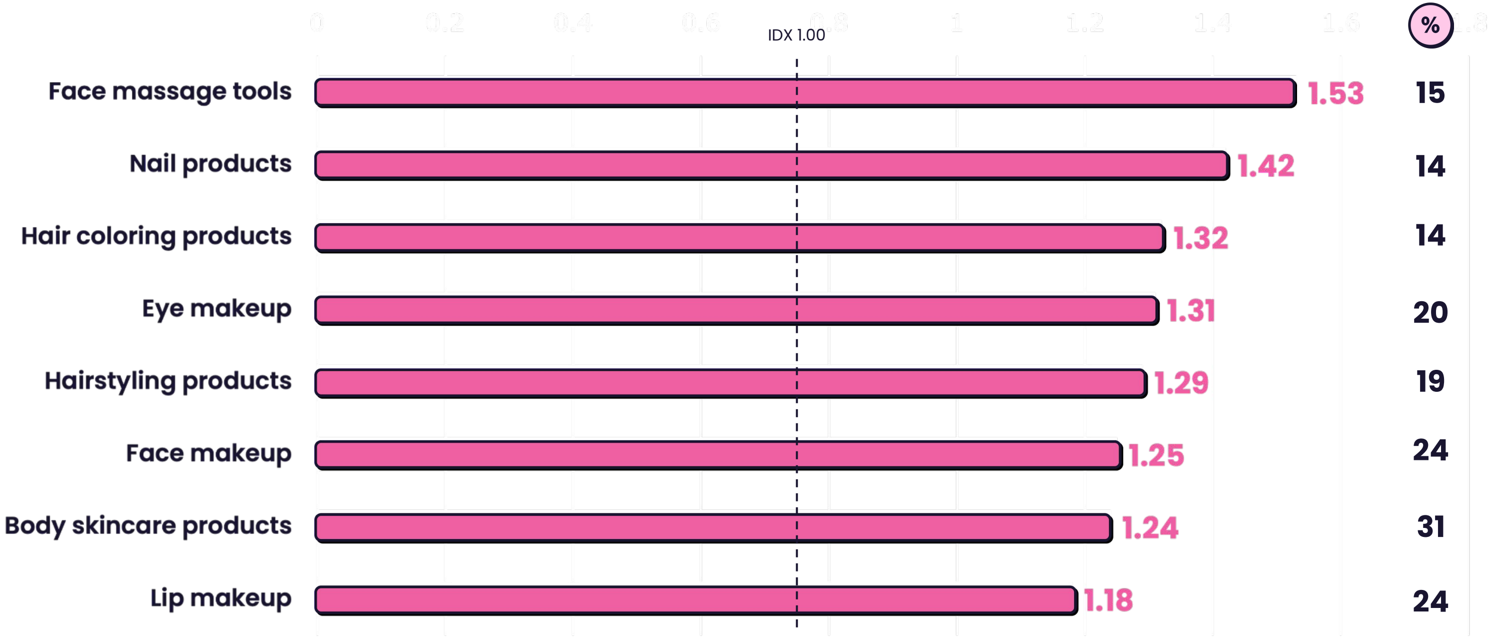


Source: GWI Zeitgeist July 2023

In China and Singapore, the **defining factor** in labeling a product as “luxury” is the **brand’s reputation**

Buyers in East Asia want to feel luxury as well as own it

Standout haircare/skincare/cosmetic products used weekly by luxury clothing buyers in 4 East Asian markets, sorted by top over-index



Source: GWI Core Q2 2023

APAC consumers take to the secondhand market

% in 5 APAC markets who say they've purchased a secondhand product in the last year, and the % of those buyers who either purchased an item of clothing or an accessory secondhand

	% who bought a secondhand product in the last year	% of secondhand buyers who purchased an item of clothing	% of secondhand buyers who purchased an accessory
Australia	72	40	12
China	62	12	20
India	56	20	16
Japan	52	32	12
Singapore	49	28	19

Source: GWI Zeitgeist July 2023

Key takeaways

01 **Consumers are now proactively searching for products on social**

02 **Find the balance between online and in-store offerings**

03 **Seamless checkout and free delivery are crucial in APAC**

04 **Social commerce is fueling impulse buying**

05 **APAC consumers strive for a luxury lifestyle, even if it's not the real deal**

10 minute break

Up next:

Who wants to be a GWIllionaire?

Who wants to be a GWIllionaire?

Play the game

Rules of engagement

- **No money** will be involved in today's festivities - but there are most definitely will be a **prize** 👀
- **No eliminations** - we'll play until the end
- **20 seconds** to answer each question. The quicker you are the more points you get!
- **Every person** for themselves - there's an 'i' in winner ok people?
- We're playing on **Kahoot** - to join the game, use this code

$1,000,000
$500,000
$250,000
$125,000
$64,000
$32,000
$16,000
$8,000
$4,000
$1,000
$500
$100

How to get started

Join at www.kahoot.it
Game PIN:

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$64,000
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$8,000
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Who wants to be a *GWI*llionaire?

Round 1

GWI Zeitgeist

Which generation is most likely to have canceled or are considering canceling their TV streaming service subscription(s) in APAC?

A. Gen Z (41%)

C. Millennials (38%)

B. Gen X (32%)

D. Baby boomers (19%)

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Who wants to be a *GWI*llionaire?

Round 1

GWI Zeitgeist

What % of APAC consumers have participated in a live shopping event?

A. 17%

C. 57%

B. 48%

D. 68%

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Who wants to be a *GWI*llionaire?

Round 1

GWI Core

In which of these markets did the highest % of consumers watch livestreams in the past week?

A. China

C. Indonesia

B. Vietnam

D. Singapore

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Who wants to be a *GWI*llionaire?

Round 2

GWI Consumer Tech

From which online sources are Singapore consumers most likely to purchase new consumer tech products?

A. General online marketplace

C. Multi-retailer

B. Manufacturer's stores

D. Specialist retailers

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Who wants to be a ***GWI***llionaire?

Round 2

GWI Gaming

Which of these is the top reason APAC gamers are gaming?

A. For fun

C. To pass the time

B. To relax/ unwind

D. To learn new skills

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Who wants to be a *GWI*llionaire?

Round 2

GWI Work

What is the likelihood that Gen Z will work as freelancers compared to other generations?

A. 0.5x

B. 0.8x

C. 3x

D. 1.7x

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$500

$100

Who wants to be a *GWI*llionaire?

Round 3

GWI Core

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$32,000
$16,000
$8,000
$4,000
$1,000
$500
$100

Among prospective car buyers in the APAC region, which demographic group is the most likely to follow through with their purchases?

A. Expecting parents

C. Parents with young children

B. Urban residents

D. High-income consumers

Who wants to be a *GWI*llionaire?

Round 3

GWI Zeitgeist

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$32,000
$16,000
$8,000
$4,000
$1,000
$500
$100

What % of consumers globally say they're likely to purchase a virtual reality product in the next 12 months?

A. 55%

C. 35%

B. 45%

D. 25%

Who wants to be a *GWI*llionaire?

Round 3

GWI Zeitgeist

What is the most common social media platform that APAC consumers use to follow influencers? (outside China)

A. Facebook (38%)

C. Youtube (58%)

B. TikTok (1%)

D. Instagram (56%)

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$16,000
$8,000
$4,000
$1,000
$500
$100

Who wants to be a ***GWI*llionaire?**

Round 4

GWI Core

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$125,000
$64,000
$32,000
$16,000
$8,000
$4,000
$1,000
$500
$100

What % of baby boomers have watched a video in the past week?

A. 55%

C. 75%

B. 65%

D. 85%

Who wants to be a *GWI*llionaire?

Round 4

GWI Travel

What kind of vacation are APAC travelers looking forward to the most?

A. City break

C. Beach

B. Nature

D. Resort

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$500,000

$250,000

$125,000

$64,000

$32,000

$16,000

$8,000

$4,000

$1,000

$500

$100

Who wants to be a *GWI*llionaire?

Round 4

PACE dataset

- $1,000,000
- $500,000
- $250,000
- $125,000
- $64,000
- $32,000
- $16,000
- $8,000
- $4,000
- $1,000
- $500
- $100

What would APAC consumers most likely do when choosing which entertainment services to buy?

A. Research & purchase offline

B. Research online & purchase offline

C. Research offline and purchase online

D. Research & purchase online

Congratulations

We have a winner

5 minute break

Up next:

Custom Success Story

Custom success story

PUBLICIS MEDIA

Robert Fry

Head of Consumer Intelligence
Publicis Media

Julian Lee

Associate Director, Research
Publicis Media

Publicis FMCG bespoke study:

Supporting a pitch without a brief

Challenges

1

NO BRIEF

The client's key brands were the only known quantities; their priority markets/ categories and corresponding primary competitor brands were unknown

2

WIDE SCOPE

The research had to cover consumer category consumption behaviour, as well as demographic attributes and media channel interactions, within the limits of a 20min survey

3

TURNKEY

Under the time constraints of an ongoing pitch, the data had to be delivered in a format and/or platform that media planners are familiar with and can easily navigate

Essentially, we need to ensure that most brands are included across all these categories.

-Rajesh

Methodology

1

RECONTACT

The FMCG survey is asked to GWI panellists - people who have completed the GWI Core survey and have already provided a wealth of data (not just demographics but attitudes, interests and more)

2

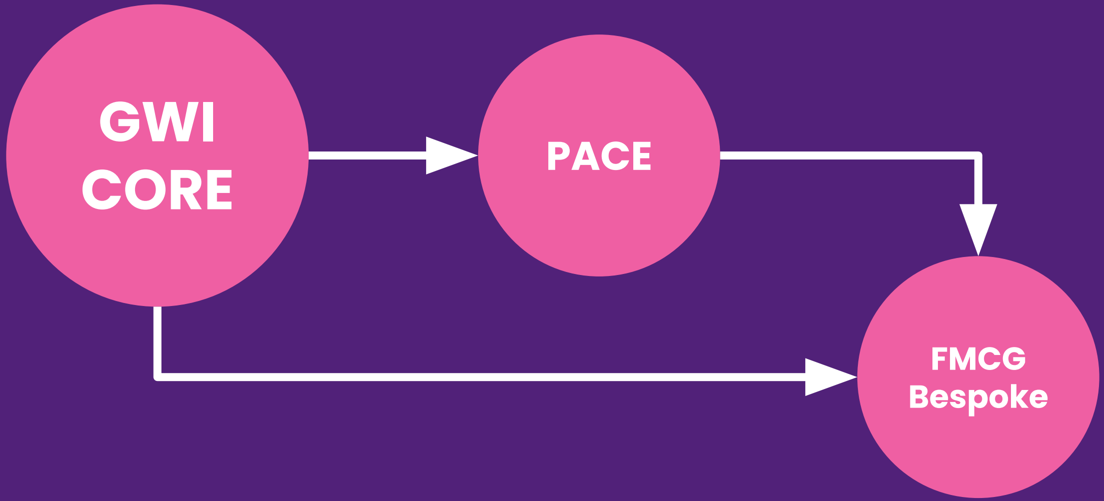
CX LOOP

Being a bespoke study, the Publicis CX Loop question and response format for brand purchase could be built into the survey, so that the resultant data is fully compatible with Publicis ways of working

3

PACE PANEL PRIORITISATION

Methodology



3

PACE PANEL PRIORITISATION

Instead of just recontacting the GWI Core, we hoped to collect a substantial sample from the PACE panel, which in itself is a recontact

Benefits

1

CATEGORY COVERAGE

The bulk of the questionnaire could be dedicated to category/brand consumption, and as it turned out, all primary competitor brands were included in the study

2

SPEED & DELIVERY

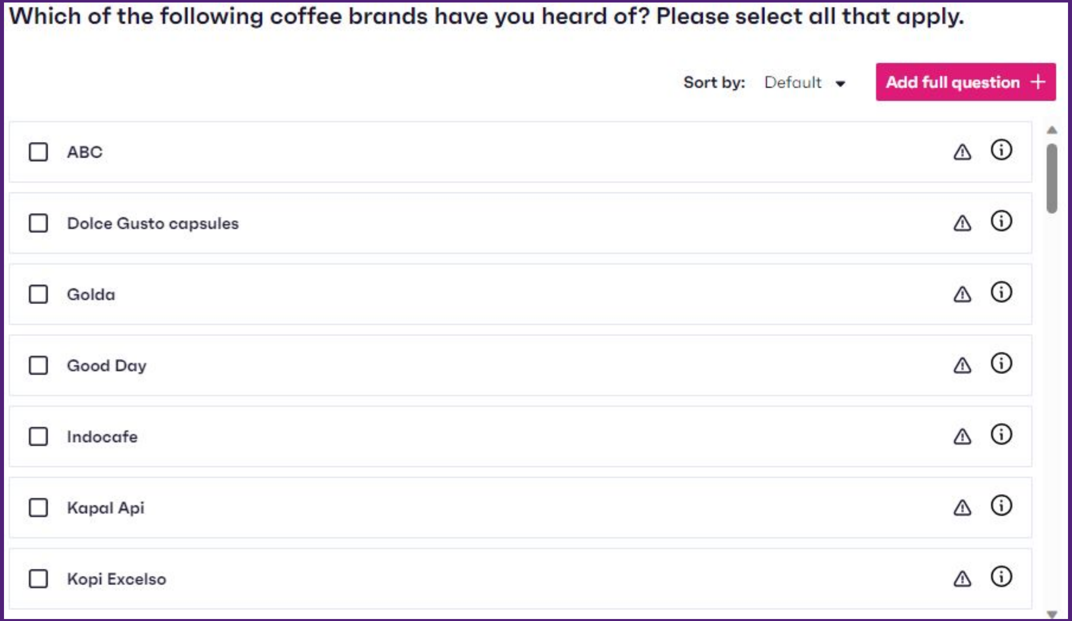
Much time was saved on fieldwork (drawing on an active panel), and on delivery to the GWI platform, a interface that is both familiar (no training /onboarding needed) and processes data instantly

3

CORE + PACE RECONTACT

The recontact of both CORE and PACE permits leveraging their respective demographic/behavioural and media channel data when digging into the FMCG data (via crosstabs)

Results



1

693 brands

across 6 FMCG categories
across 6 markets

Results

+ Add an attribute / audience

			A Totals	B Ready-to-drink / powdered malt drinks (e.g., ...
1	Totals	Universe	121.9M	54.8M
		% Column	100%	100%
		Index	100	100
2	3,000,000 IDR or less OR any of 4 data points / audiences ...	Universe	60M	32.7M
		% Column	49.2%	59.7%
		Index	100	120.5
3	Social network posts from brand... Influence	Universe	32.1M	15.6M
		% Column	26.7%	28.5%
		Index	100	93.9

2 & 3

Crosstab using CORE, PACE, and FMCG Bespoke data

Next steps

Q&A

GWI Rockstars

In the last 12 months.....

Most platform logins

Most crosstab exports

Most audiences created

And that’s a wrap!