

GWI DAY



PUBLICIS
GROUPE

GWI.

What's in here

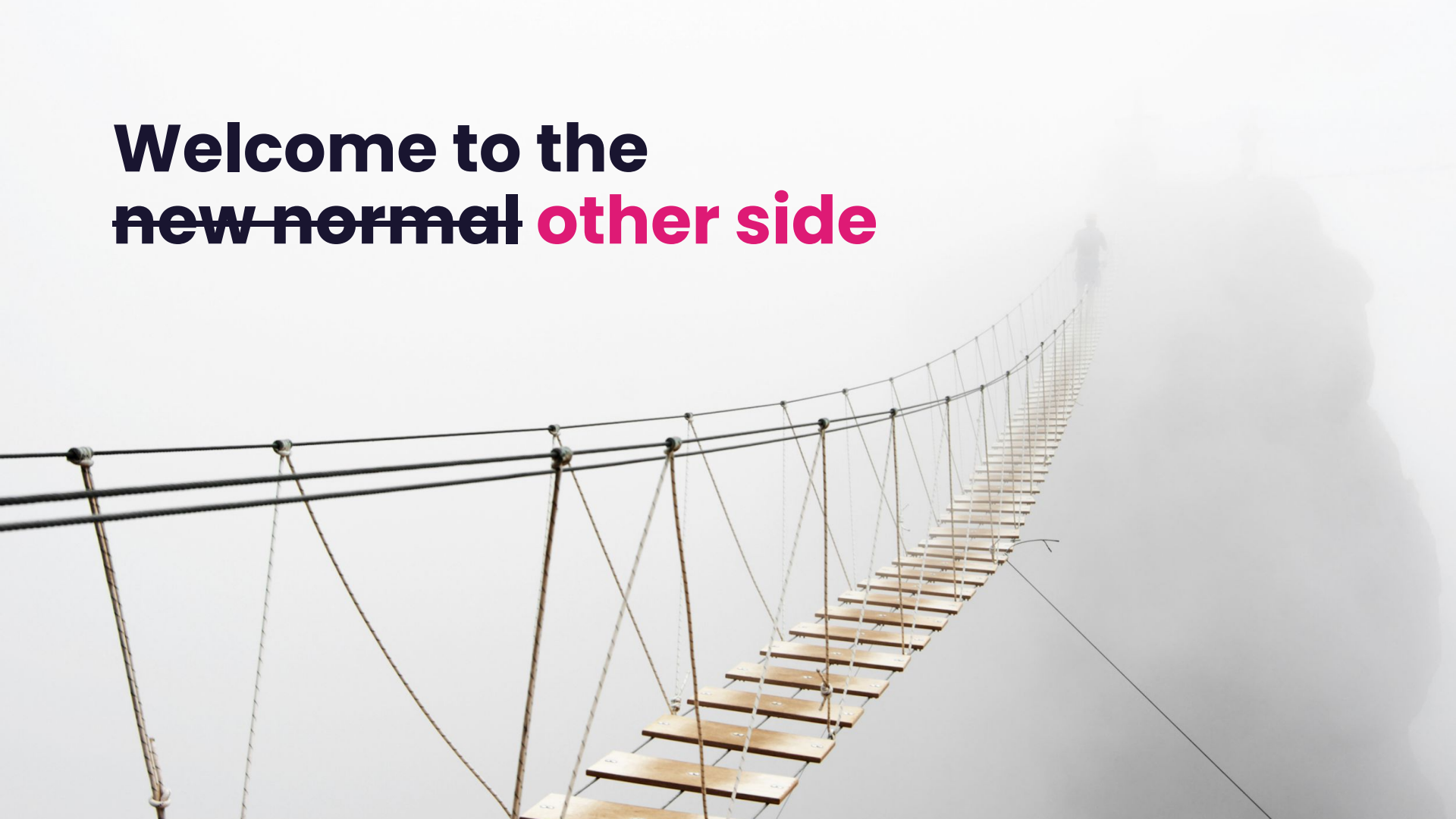


GWJ & Publicis

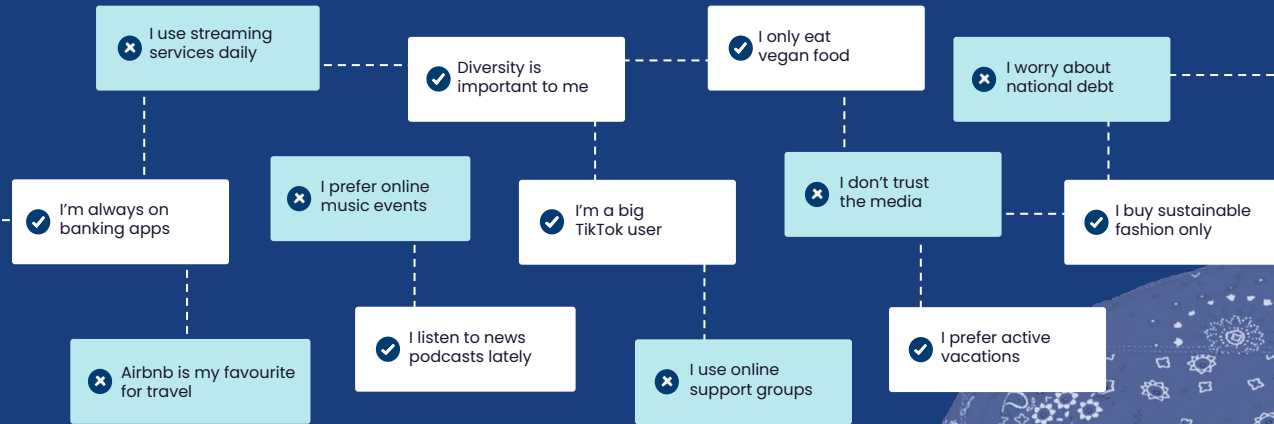
Getting the most out of GWJ



**Welcome to the
~~new normal~~ other side**



Things (and people) change by the minute



2/3

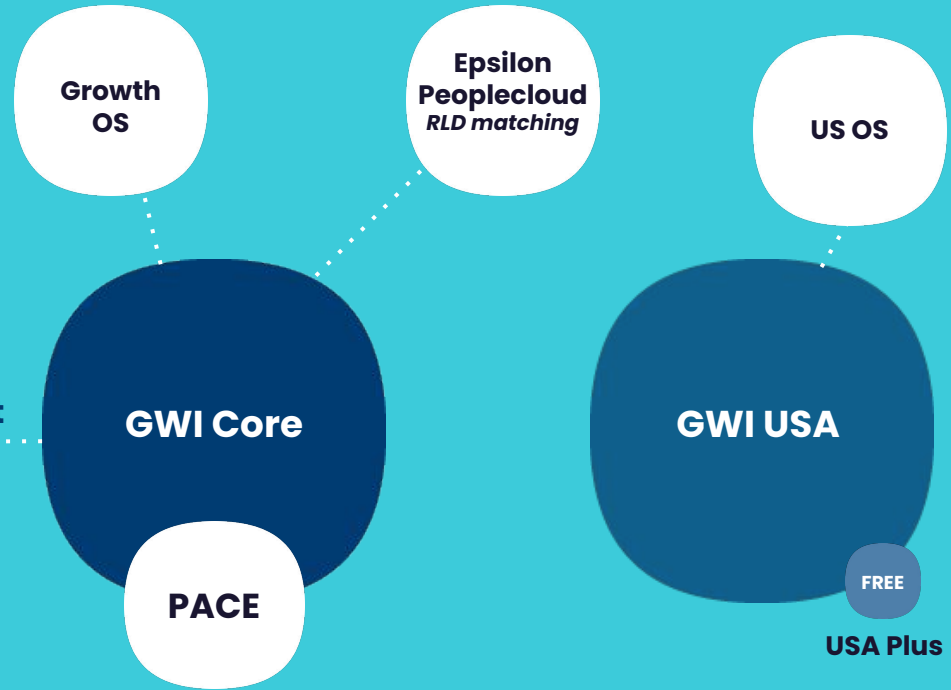
ChatGPT users would consistently use it over a search engine to answer questions

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

GWI Universe



Recontact



 **GWI Kids**

GWI USA gives you a nationwide view of your target market

20_k

Responses released quarterly

240_{M+}

Consumers represented, ages 16+

210

Designated market areas



GWI USA Plus: Keep your finger on the pulse of modern America



**Environment &
sustainability**



**Mental health
and wellbeing**



**Diversity, equity
and inclusion**



**Social issues
and activism**

Publicis PACE

- Bespoke 5 min recontact study, private to Publicis
- Bi-annual questions on channel roles & influences
- Pointlogic integration for media planning
- Bi-annual bespoke regional questions



**Do whatever
you want
with **GWI**
Custom**

 **Ask your audience anything**

 What do they really think of your brand?

 **How do they interact with you?**

 Will that campaign work?

 Will that message cut through?

 How do they see you versus competitors?

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**

GWl 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 GWl Core or USA datasets

GWI + Nielsen fusion

**Upgrade your analysis
by plugging in leading
insights into TV/cross
media viewership**



GWI + Helixa fusion

**Combine consumer
and social media data
to view your audience
from every angle**



**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



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 **GW**I team



Christy Civitanova

Senior Account Director,
Americas



Lizzy D'Souza

Global Account Director,
Global



Jim Soscie

VP of Agency,
Americas



Tyler Collins

CS Manager,
Americas

Nafiza Uddin

CER ROW

Sophie Barter

Head of Networks UK

Odelia Ching

Account Manager APAC

Saskia Casanove

Account Manager, EMEA

Teddy Piper

CS APAC

George Lyons

CS EMEA

Stacy Chiam

CS APAC

Kabya Saikia

CS EMEA

Publicis partnership

Understanding the power of GWI



Fireside chat



Courtney Weg

EVP, Integrated Strategy Lead,
Zenith Media



Sera Anne Herold

VP, Data and Platform Solutions,
Zenith Media



Christy Civitanova

Senior Account Director,
GWI

GWl trends

E-commerce: you are what you buy

**You are what
you buy**

Retail trends in 2023

GWI.



How people buy

Buying journeys

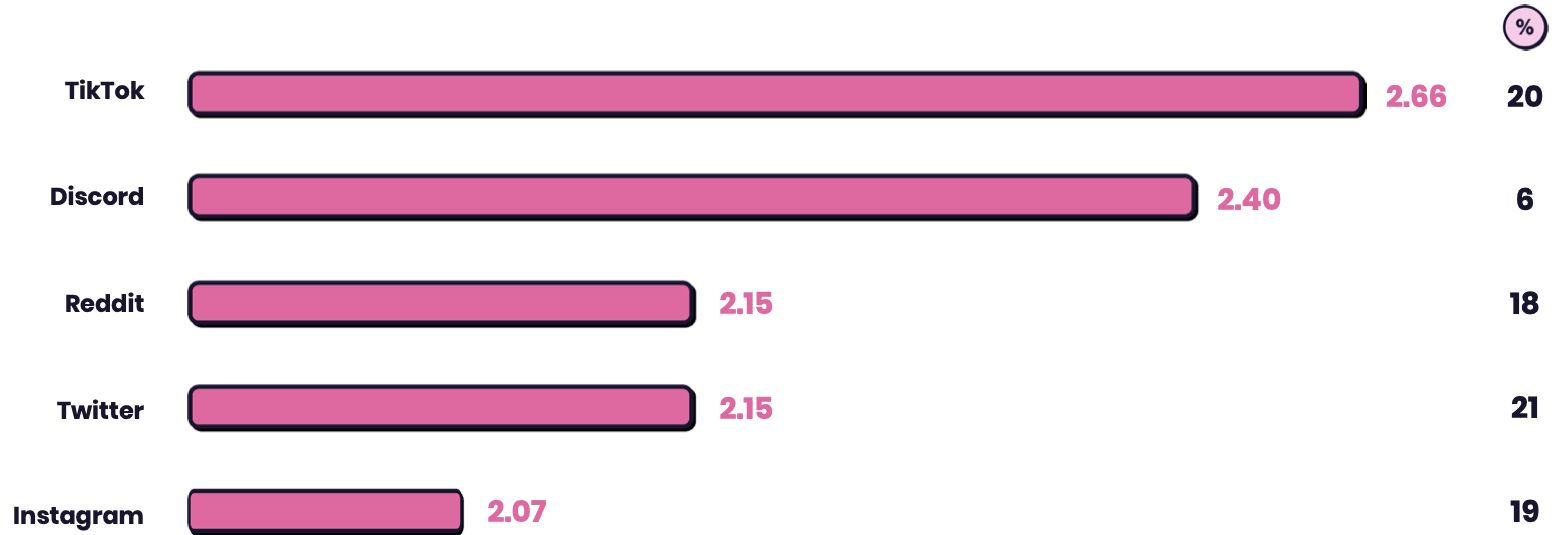
More are going online for inspiration

Rank based on the % of Americans who say the following are important reasons for using the internet



There's even more competition for search

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





45%

**of American 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 2019 & Q2 2023

+6 mins



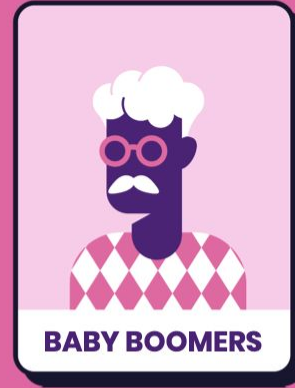
-3 mins



+20 mins



+18 mins





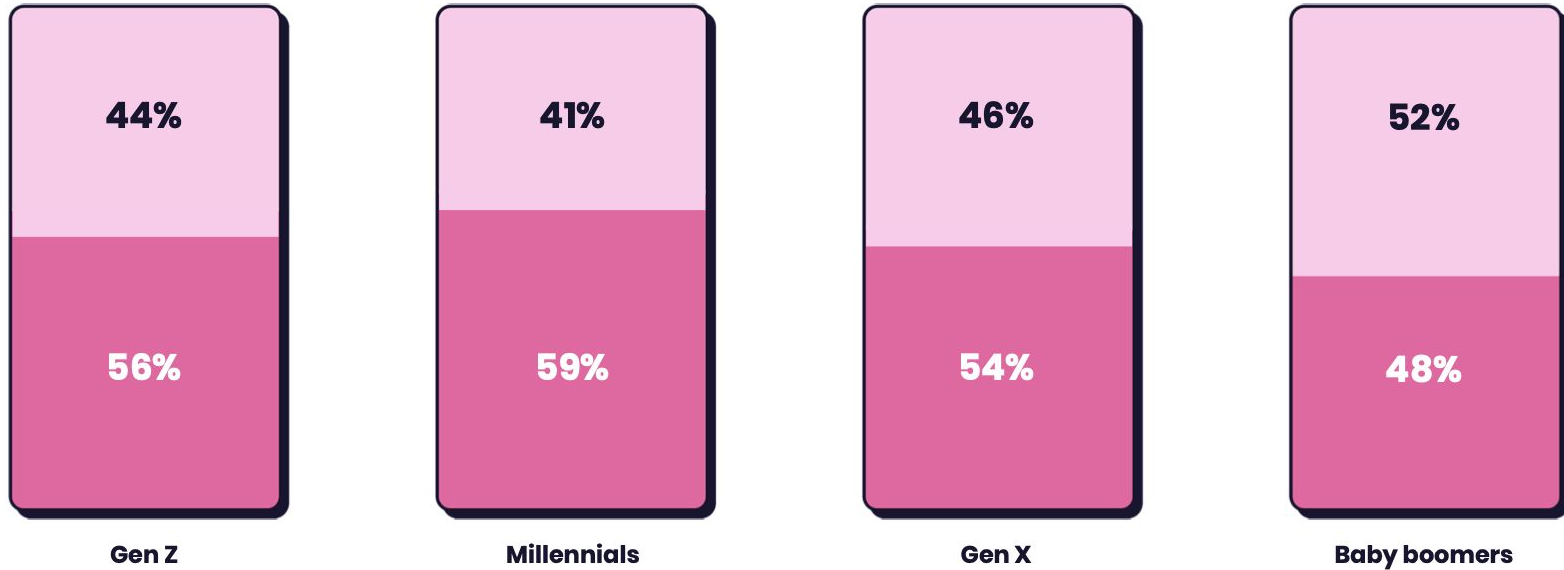
Where people buy

Online vs. in-store

Finding the right balance

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

■ Online ■ In-store





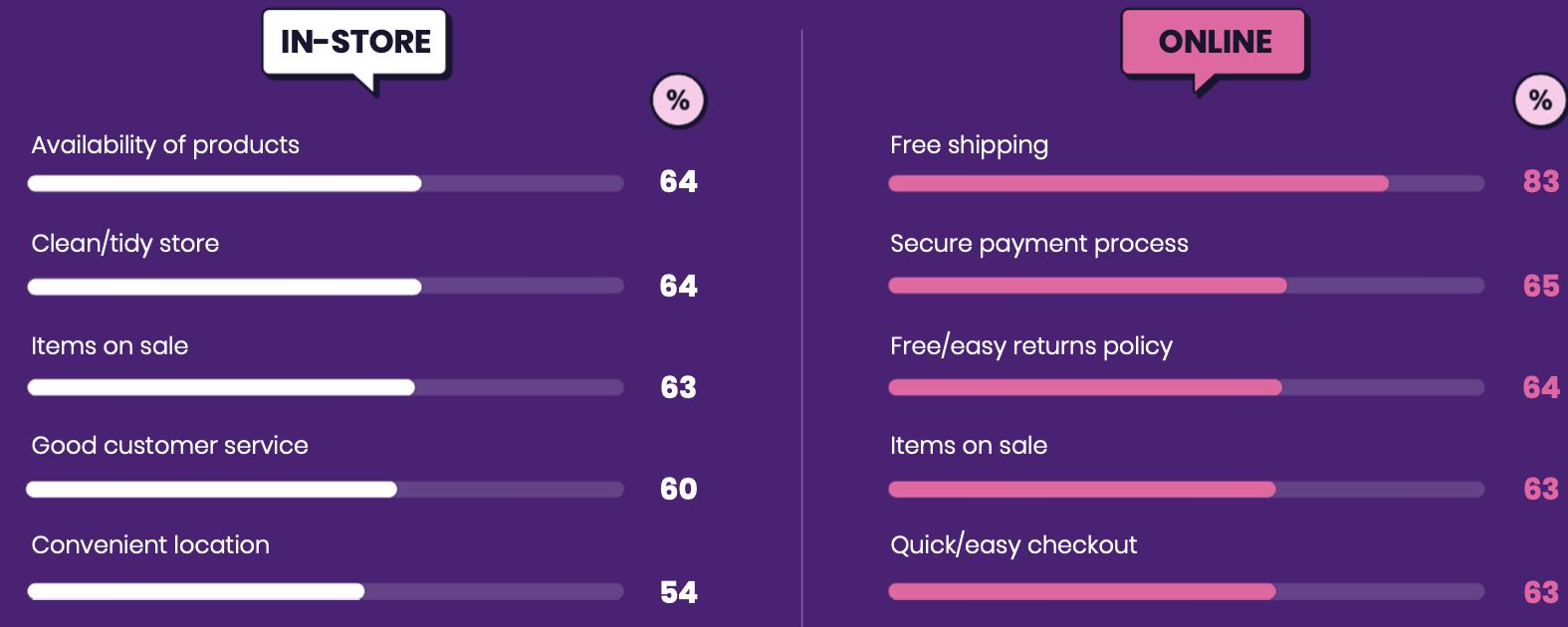
Spotlight on

The checkout catalyst



What drives people to buy

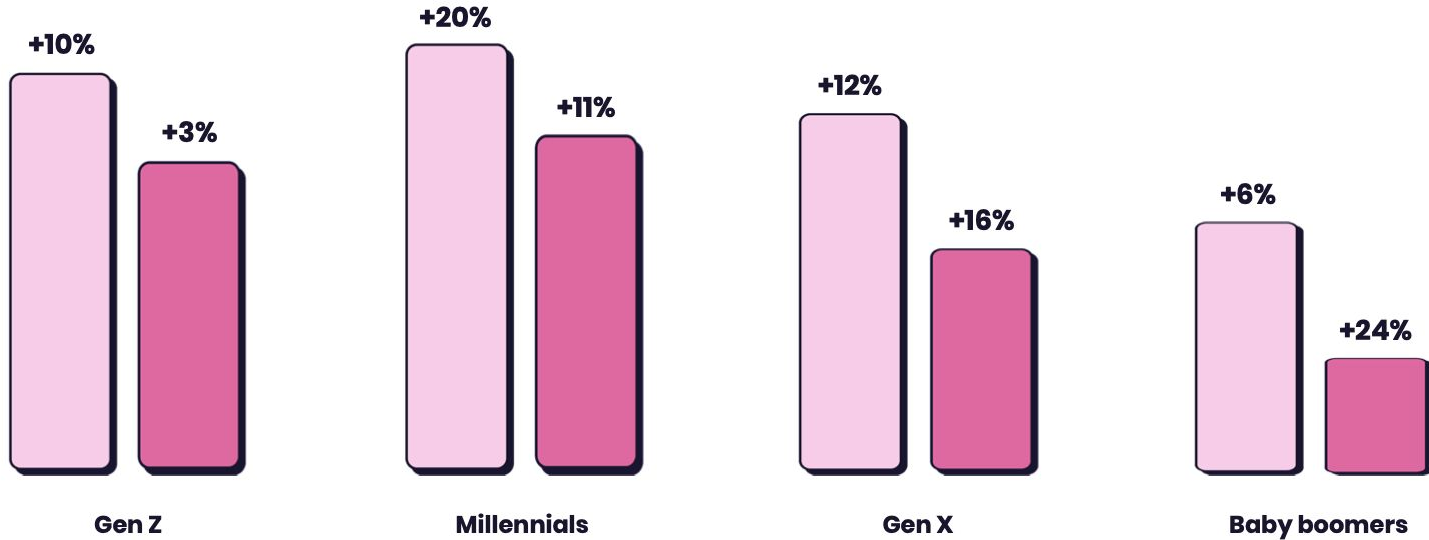
% of Americans who say the following is important to them when shopping in-store and online



Next-day is the expectation, same-day is the goal

% change since Q2 2022 of Americans who say the following would increase the likelihood of them purchasing a product online

○ Next-day delivery ● Same-day delivery



The lowdown on loyalty

**Loyalty points are
a growing purchase
driver among
Americans**



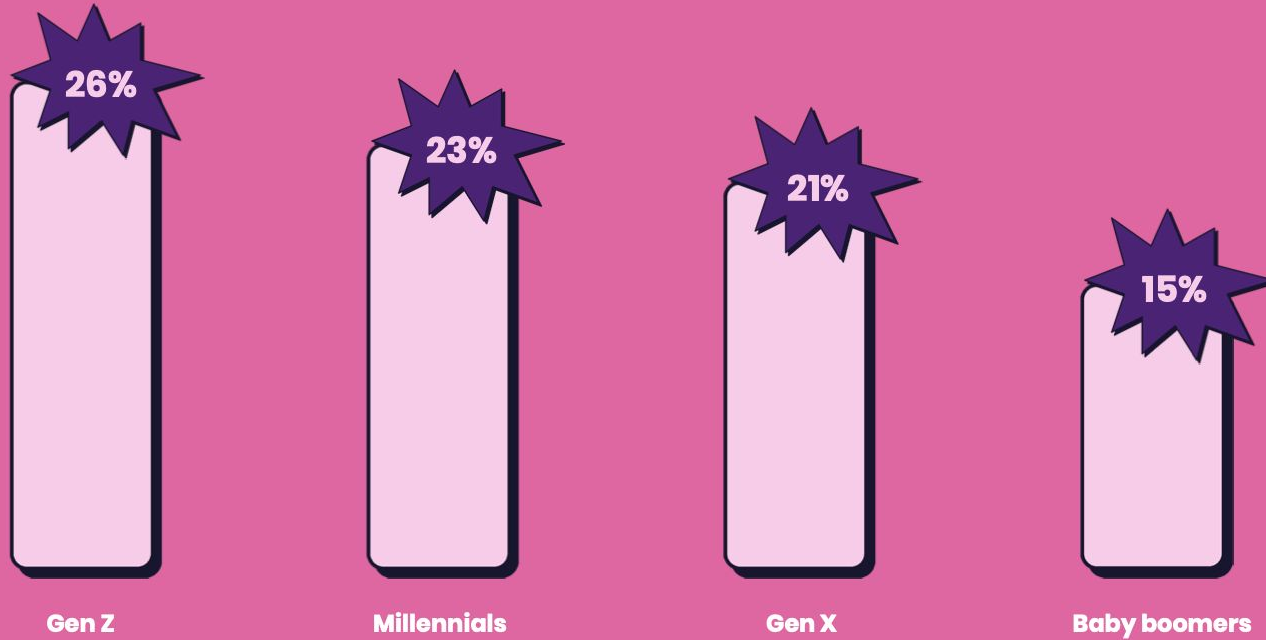


Why people buy

The psychology of shopping

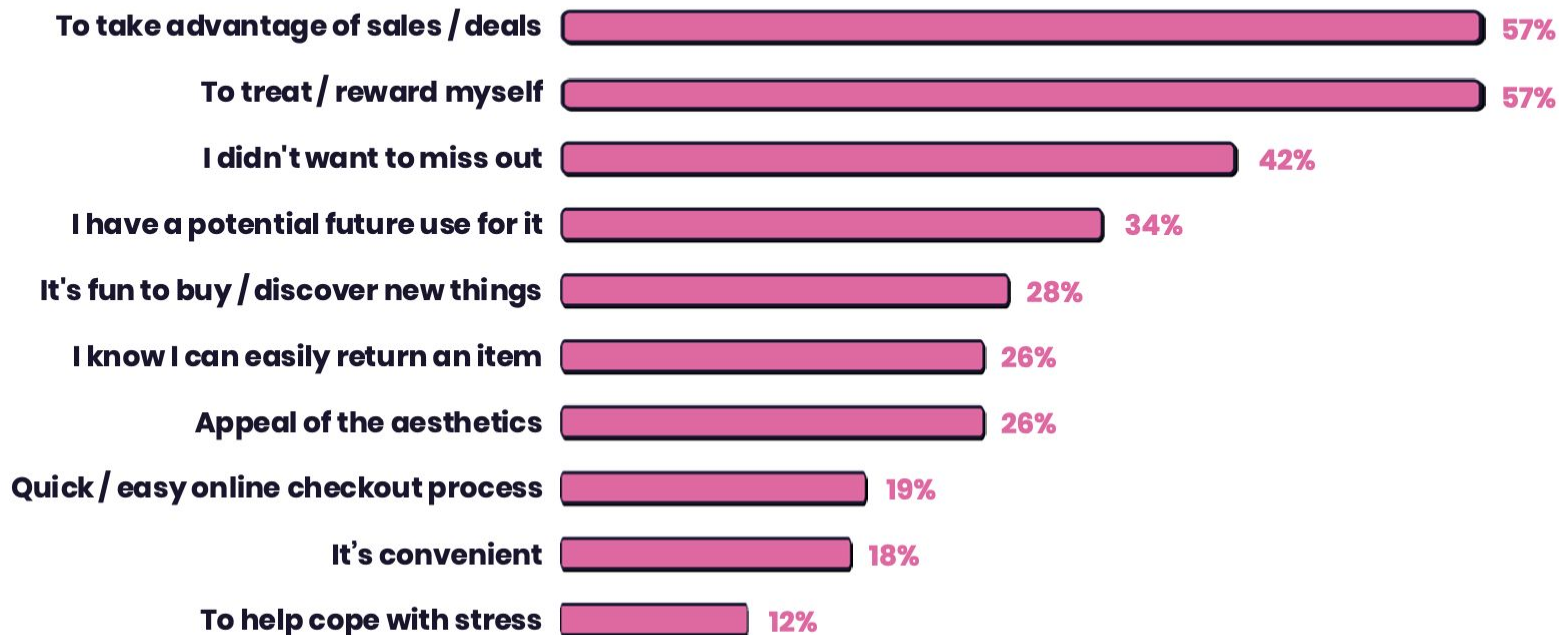
Retail therapy: the real picture

% of Americans who say they often make impulse purchases



Mood-boosting treats for the win

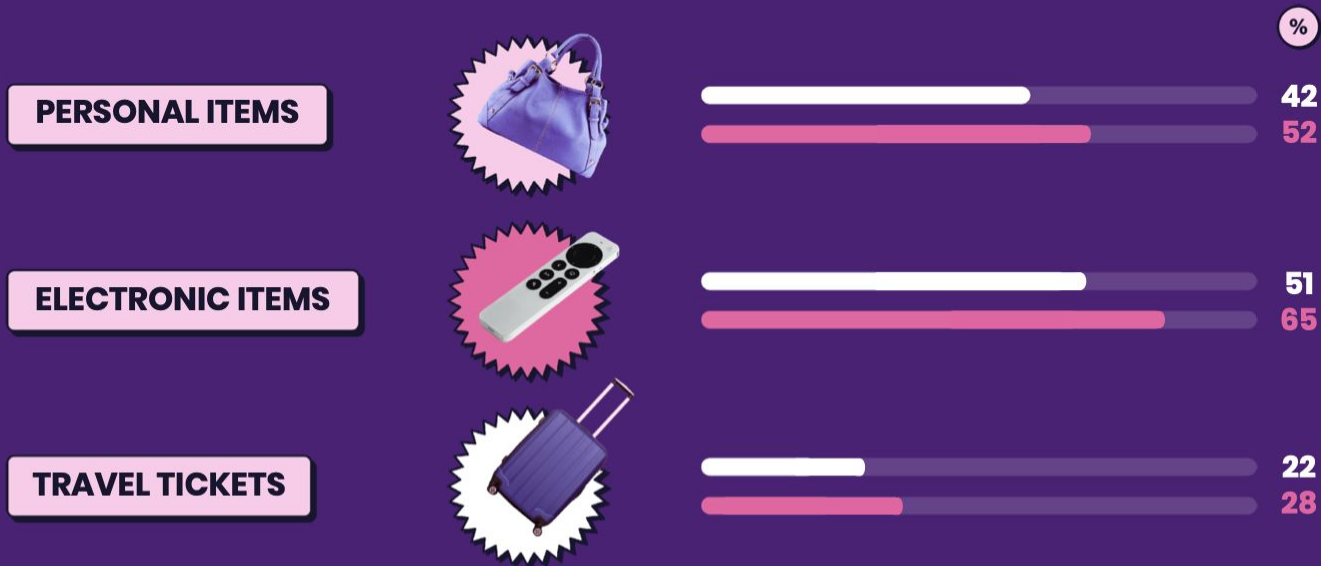
% of American impulse purchasers who say they make impulse buys for the following reasons



What are the hot ticket impulse buys?

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

■ Planned to purchase in the next 3-6 months ■ Purchased 3-6 months later





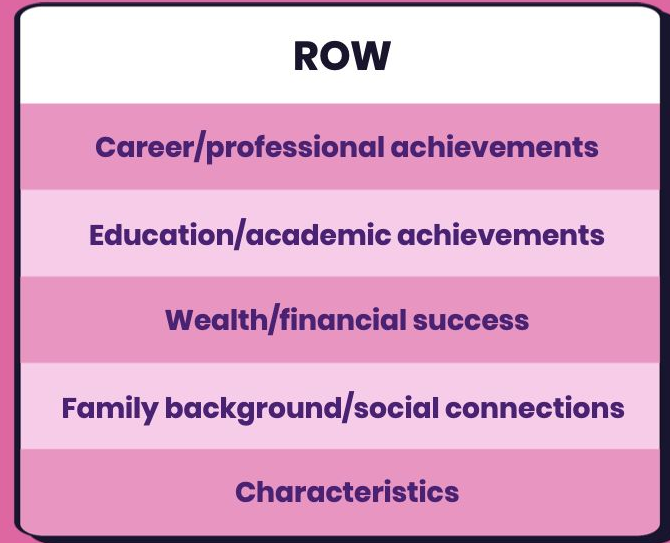
Spotlight on

Luxury purchases



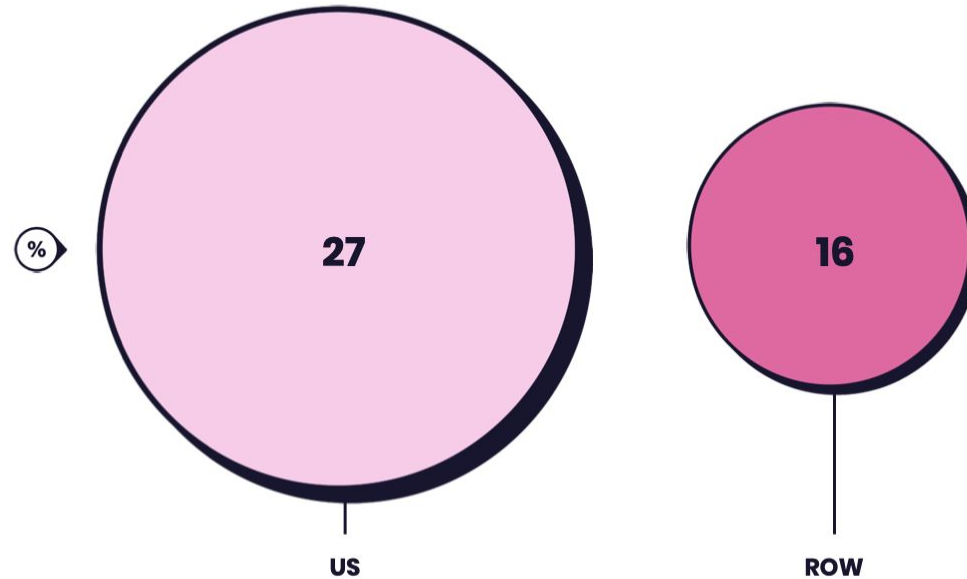
American dream or material obsession?

Ranking of consumers who feel the following symbolizes someone's status in today's society



How Americans define luxury

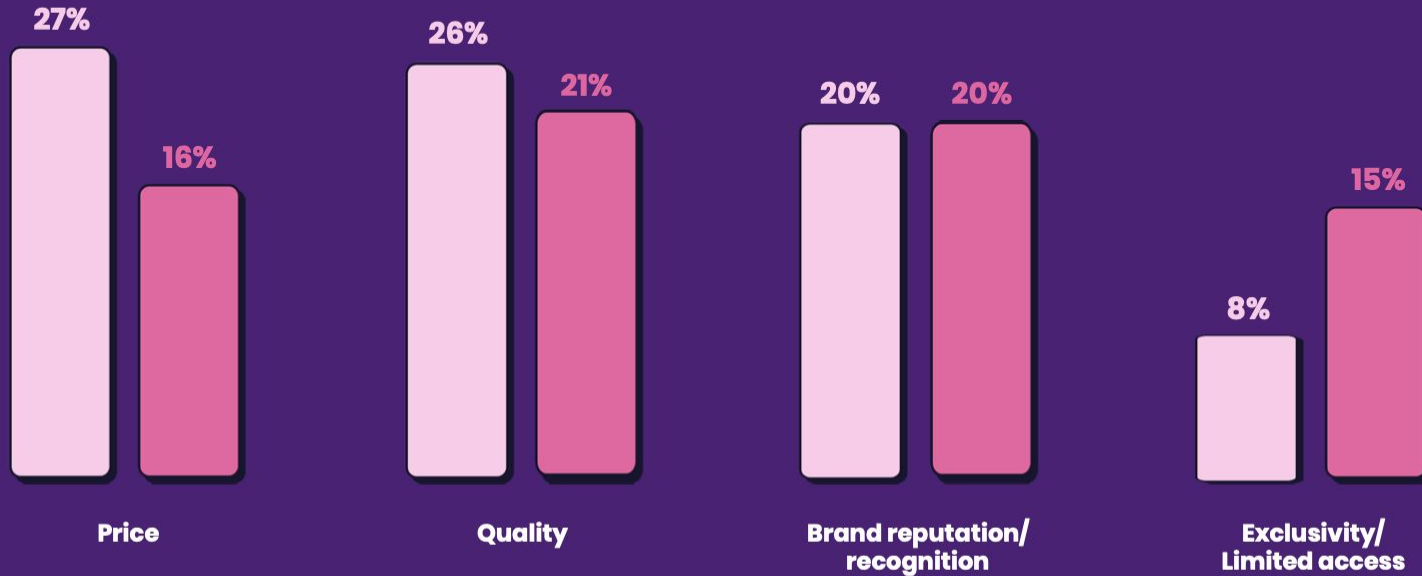
% of consumers who consider **price the defining factor of a product being “luxury”**



Perception of luxury

% of consumers who consider the following the defining factor of a product being "luxury"

■ US ■ ROW



SALE

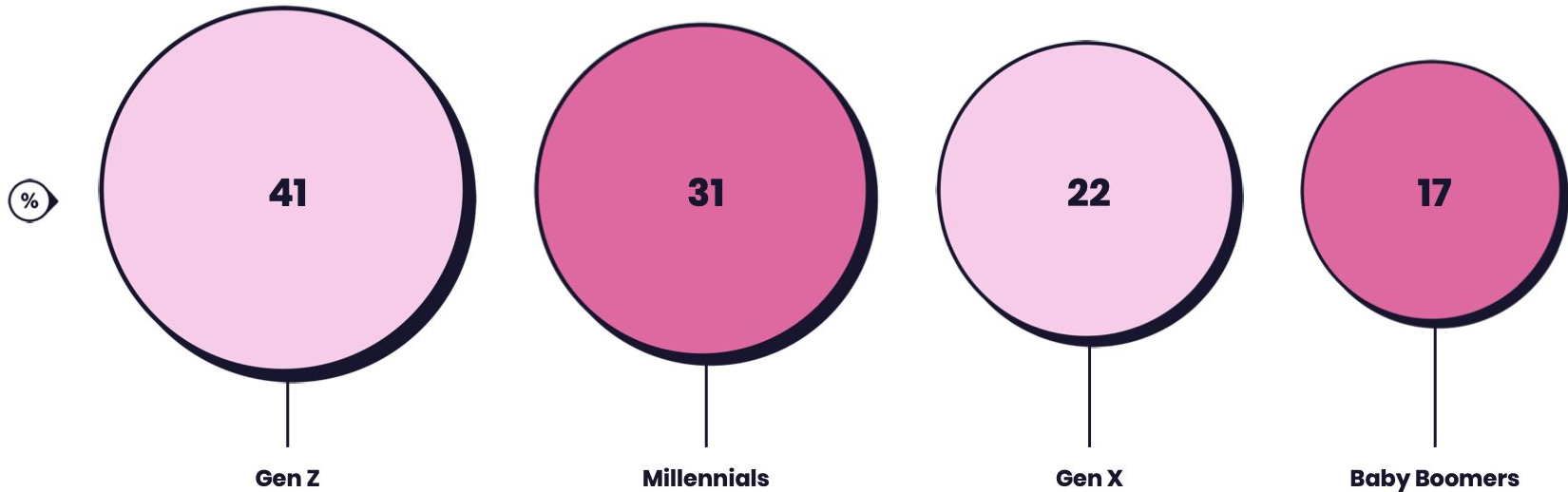


Americans primarily buy fake/duplicate products due to **price** and **value** for their money



Gen Z leads for fake/duplicate purchases...

% of Americans by generations who have purchased a fake/duplicate in the last year



**Americans who have purchased
a second-hand product in the
last year are 11% more likely to
prioritize sustainability**

Key takeaways



01

Shopping journeys are becoming more inspo-driven vs info-driven

02

Consumers lack brand loyalty as shopping habits shift

03

Perceptions of luxury are changing– find new ways for aspirational demands

Thank you

Got questions?

trends@gwi.com

GWI.

10 minute break

**Up next:
Who wants to be
a GWilllionaire?**



Who wants to be a **G**W**ill**ionaire?

Play the game



Rules of engagement

- **No money** will be involved in today's festivities - but there is most definitely **a prize** 🙄
- **No eliminations** - we'll play until the end
- **No cheating** - duh
- **Every person** for themselves - there's an 'i' in winner ok people?

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How to get started

Join at www.kahoot.it

Game PIN: click on the banner below

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Who wants to be a *GW*illionaire?

Round 1

GW USA



In the last year, what was the % increase for consumers who say that next-day delivery is important to them?

A. 55%

C. 10%

B. 16%

D. 36%

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Who wants to be a *GW*illionaire?

Round 1

GW Consumer Tech



Globally, what % of consumers say they plan to buy their future devices brand new?

A. 57%

C. 42%

B. 78%

D. 20%

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Who wants to be a *GW*illionaire?

Round 1

GW*I* Zeitgeist



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

A. Gen Z

C. Millennials

B. Baby Boomers

D. Gen X

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Who wants to be a **GW**illionaire?

Round 2

GW USA



What % of US consumers like to see sustainability talked about in ads?

A. 33%

C. 89%

B. 58%

D. 24%

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Who wants to be a **GW**illionaire?

Round 2

GW**I** Kids



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Globally, what % of kids aged 8 to 11 have played Roblox?

A. 22%

C. 37%

B. 49%

D. 28%

Who wants to be a **GW**illionaire?

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GW**I** Kids



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Who wants to be a **GW**illionaire?

Round 2

GW*I* Zeitgeist



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

A. 22%

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B. 48%

D. 11%

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Who wants to be a *GW*illionaire?

Round 3

GW I USA



How much more likely are Americans with mental health conditions using Tumblr?

A. 22%

C. 37%

B. 11%

D. 45%

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Who wants to be a **GW**illionaire?

Round 3

GW**I** Automotive



Globally, what is the most important factor to consumers when purchasing a car?

A. Comfort

C. Safety features

B. Fuel efficiency

D. Performance/handling

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Who wants to be a *G*Willionaire?

Round 3

GWI Zeitgeist



What is the most common social media platform that American consumers use to follow influencers?

A. Facebook

C. Youtube

B. TikTok

D. Instagram

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Who wants to be a **GW**illionaire?

Round 4

GWI USA



What % of US consumers are more likely to purchase from brands that are transparent about internal operations?

A. 60%

C. 44%

B. 24%

D. 57%

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Who wants to be a **GW**illionaire?

Round 4

GWI Alcohol



What % of American consumers have purchased a Heineken in the last month?

A. 14%

C. 28%

B. 7%

D. 10%

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Who wants to be a **GW**illionaire?

Round 4

GWI Zeitgeist



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

A. 12%

C. 49%

B. 57%

D. 37%

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Congratulations

We have a winner



5 minute break

Up next:

Custom Success Story



Publicis custom success story

Kraft Heinz Segmentation



Background

Understand, define, activate

In 2021, Publicis conducted a custom research study through GWI to segment consumers into psychographic groups.

From there, the team implemented the segments into Epsilon PeopleCloud.

As economic conditions change and data continuously shifts, the segments have become less defined and there is a need to refresh the segmentation.

Understand

Goals

The segmentation and meal moment/benefit groupings will help brands target specific consumption audiences more effectively and accurately to generate growth.

This updated psychographic segmentation, and the meal moments/benefits audiences captured in the dataset, will help brands develop creatives that both attract, and accurately market to their target consumers.



Define

Collect consumer insights to paint a fuller picture

This data allows us to establish behaviors related to specific meal moments, as well as attitudes, demand and barriers to entry brands must consider when looking to target consumers for these types of meal / snacking occasions.

This custom research study covers:

- Audience sizing
- Meal Consumption Behavior
- Macro & Micro Demand Moments

In addition, this dataset can be leveraged alongside GWI's syndicated data, via our recontact methodology, which enables Publicis to draw on a wide range of demographics, self-perceptions, attitudes, online behaviors and more.

Methodology

Recontact sample

At GWI, we have a panel of over **22m consumers** -having this relationship with respondents means you can recontact them.

This recontact methodology enables us to survey respondents who have completed our core survey within the last 4 waves. This data can then be synchronized with our core data, which consists of over 40,000 data points.



How GWI helped



We field a re-contact survey containing your golden questions to assign each respondent to your segment solution



We evaluate the model against a battery of metrics – including precision, recall, and differences in predicted vs. observed segments by market



Once your segments are recreated and synced with our GWI Core (or GWI USA) dataset, you can unlock a wealth of insights about their behaviors and attitudes

Activate

Integrate segments into Epsilon PeopleCloud

Certain Kraft brands want to target different segments of the population, so they use these segments in Epsilon PeopleCloud platform that also has other GWI data fed into it.

The goal is to identify those people who fall into the segments, understand what they are interested in, their attitudes to target them, and then use that data to inform advertising partners who to reach with the ads.

We're also looking at certain mealtime moments to understand what people eating breakfast/lunch/dinner/snacks are feeling during those meals to learn how to advertise to them

GWJ Awards



In the last 12 months.....



**Most GWI
platform
logins**



**Most total
actions
performed in GWI**



**Most active
user in the PACE
study**

**And that's
a wrap**

