GWI DAY

PUBLICIS GROUPE

GWI.

Welcome!

Jason Mander
Chief Research Officer

What’s in here

1. GWI & Publicis
2. Understanding the power of GWI

5 mins break

3. GWI trends: Retail trends 2023
4. Custom Success Story: Primark

10 mins break

5. Who wants to be a GWIillionaire?
6. GWI Awards
7. Concluding thoughts

Who you'll hear from today: Publicis

Kristina Von Gerichten
Senior Director of Data Analytics,
Publicis Media

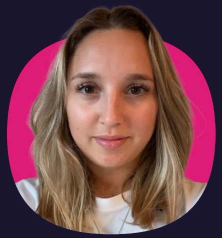
Mary Hudson
Analytics Director,
Digitas

Honor Moshay
Analytics Director,
Digitas

Who you'll hear from today: GWI

Jason Mander
Chief Research Officer

Lizzy D'Souza
GLobal Account Director



Saskia Casanova
Account Manager

Lu Hussain
Senior Trends Analyst

GWI & Publicis

Getting the most out of GWI

Welcome to the ~~new normal~~ other side

Where things (and people) change by the minute

2/3

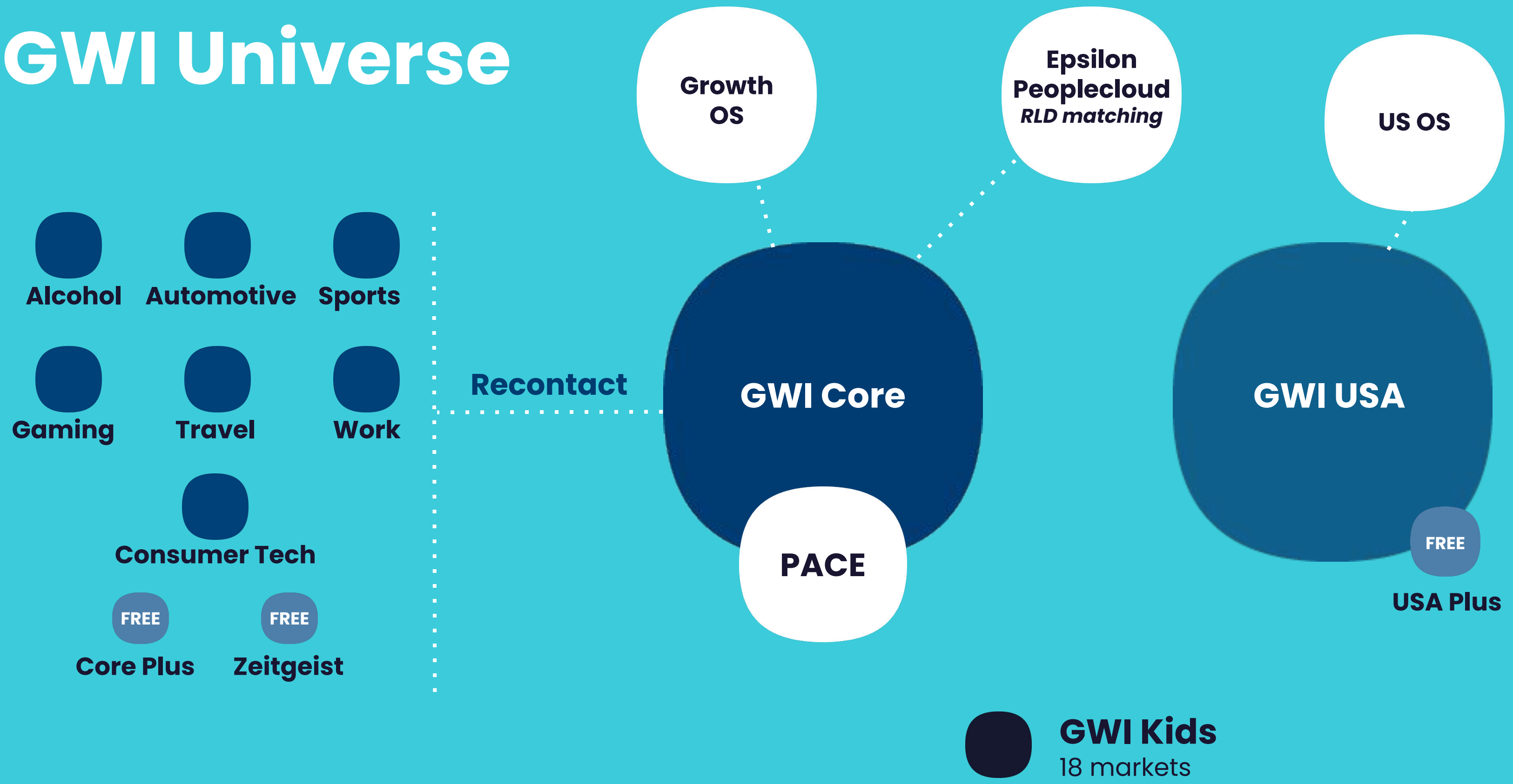
ChatGPT users would consistently use it over a search engine to answer questions

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

56%

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

GWI Universe



PACE: Topics

Q1 2023
Channel roles & influences

Q3 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

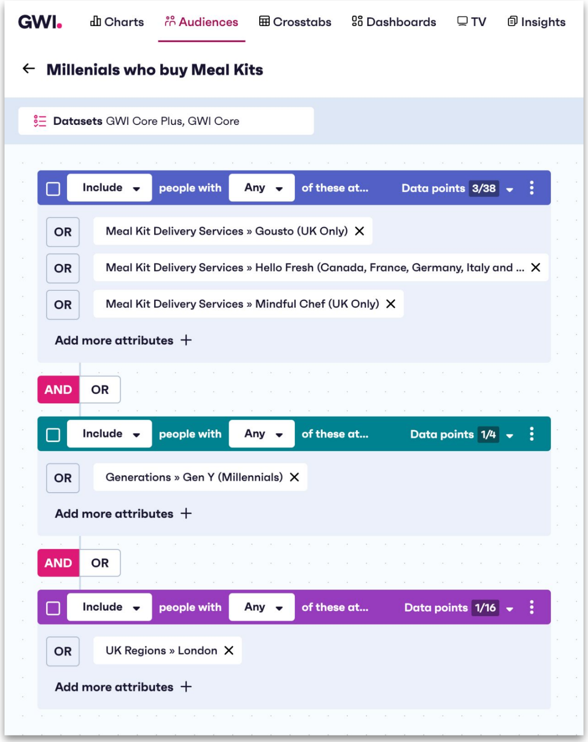
GWI product roadmap sneak peek 👀

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

EMEA

Lizzy D'Souza
Global Account Director

Saskia Casanova
Account Manager, EMEA

Nafiza Uddin
CER ROW

George Lyons
Senior Customer Success Manager

Kabya Saikia
Customer Success Executive

Alex Truman
Customer Success Director

ROW

Sophie Barter
Head of Networks EMEA

Jim Soscie
Head of Networks US

Christy Civitanova
Senior Account Director US

Odelia Ching
Account Manager APAC

Tyler Collins
CS US

Teddy Piper
CS APAC

Kabya Saikia
CS EMEA

Support email
hellopublicis@gwi.com

Publicis partnership

Understanding the power of GWI

Kristina Von Gerichten

Senior Director of Data Analytics,
Publicis Media

Lizzy D'Souza

Global Account Director
GWI

5 minute break

Up next:

Retail Trends 2023

GWI trends

E-commerce: you are what you buy

You are what you buy

Retail trends in 2023

GWI.

01

How people buy

Buying journeys

Researching brands is on the decline

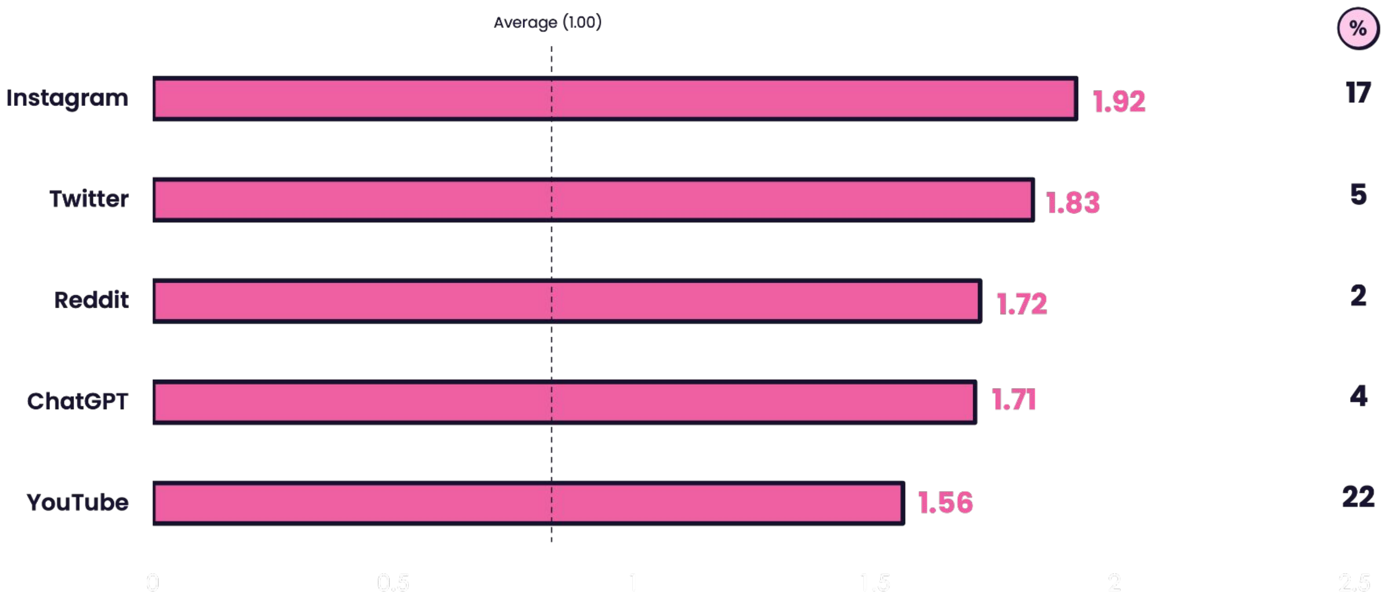
Rank based on the % in EMEA who say the following are important reasons for using the internet

Q2 2019	Rank	Q2 2023
Finding information	1	Finding information
Keeping up-to-date with news/events	2	Staying in touch with friends/family
Staying in touch with friends/family	3	Keeping up-to-date with news/events
Researching how to do things	4	Researching how to do things
Researching products/brands	5	Watching videos, TV shows or movies
Watching videos, TV shows or movies	6	**Researching products/brands**
Finding new ideas or inspiration	7	**Finding new ideas or inspiration**
Filling up spare time/general browsing	8	Accessing/listening to music
Accessing/listening to music	9	Filling up spare time/general browsing
Researching places/vacations/travel	10	Researching places/vacations/travel

Source: GWI Core Q2 2019 & Q2 2023

There’s even more competition for search

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



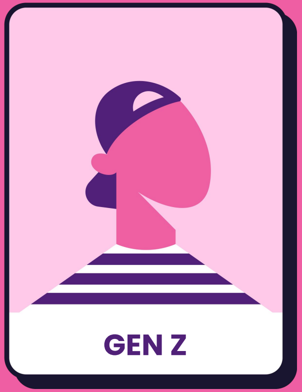
Source: GWI Zeitgeist May 2023

38% of millennials in Europe 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

-17 mins



-14 mins

+1 min

+6 mins

Source: GWI Core Q2 2019 & Q2 2023

02

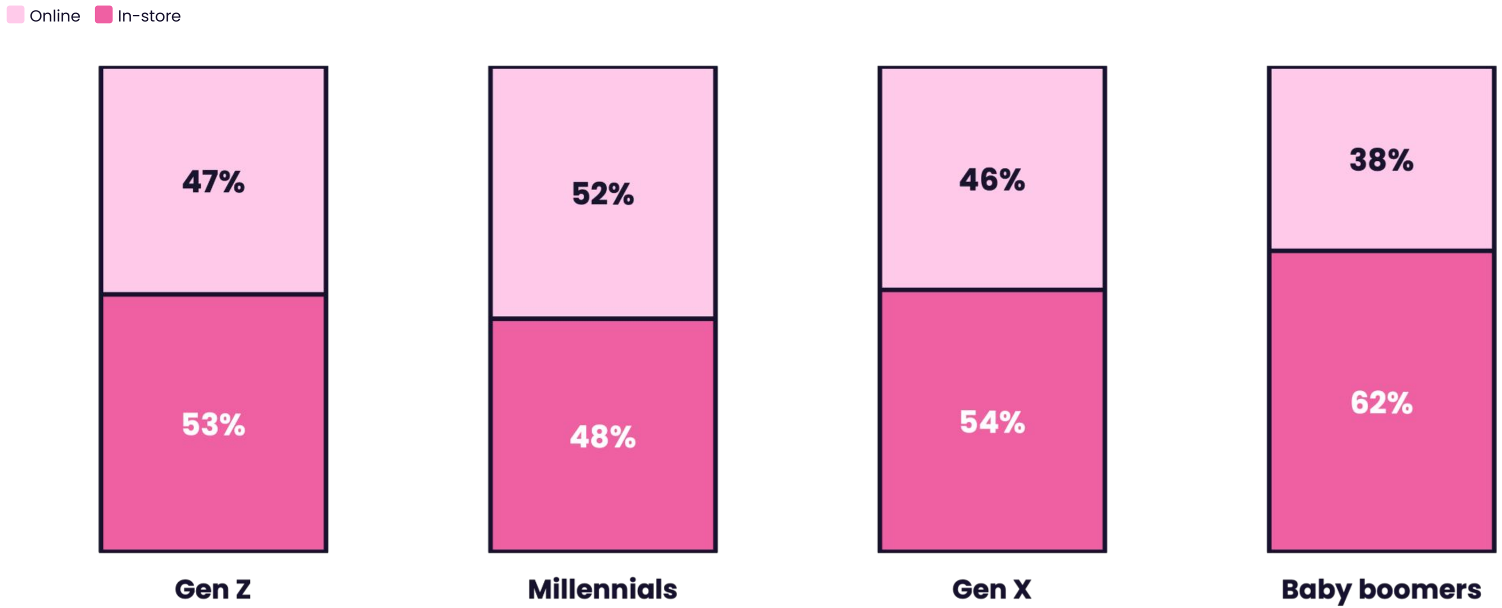
Where people buy

Online vs. in-store

52% of consumers in EMEA say they'd rather shop in-store than online

Finding the right balance

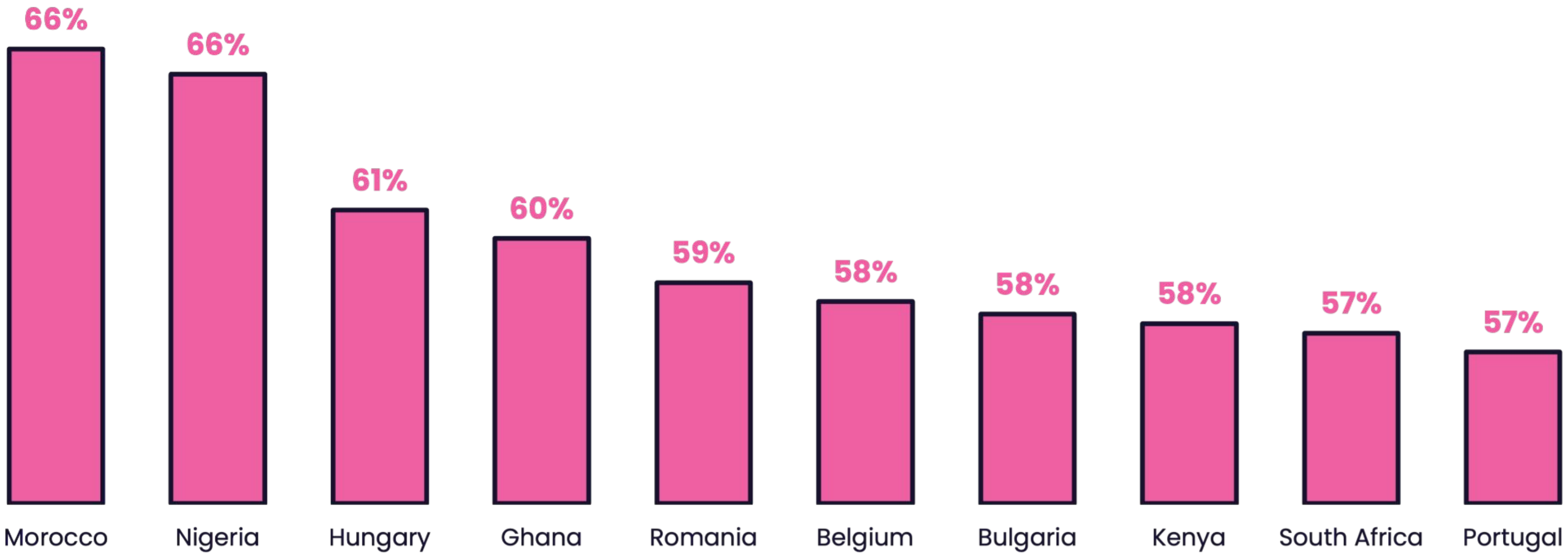
% who say they'd rather shop in-store/online, by generation



Source: GWI Core Q2 2023

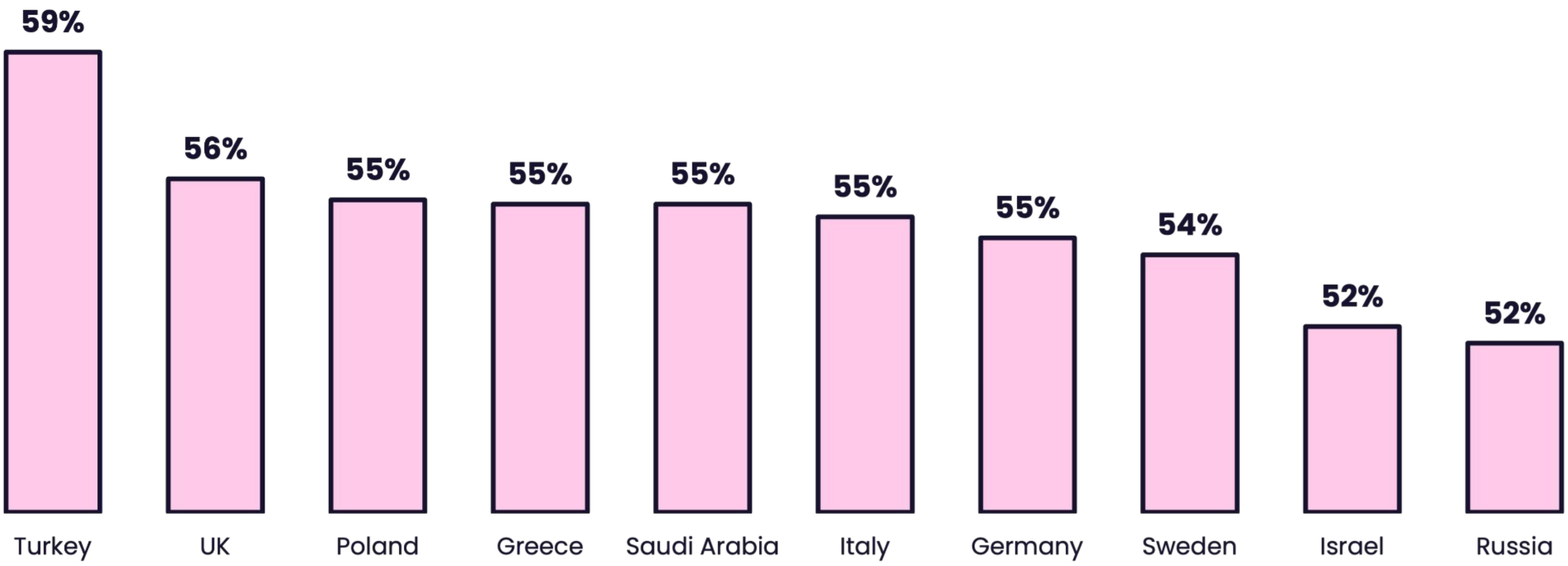
Some prefer to shop IRL

% in EMEA who say they'd rather shop in-store, sorted by market



Source: GWI Core Q2 2023

...while others are big on URL



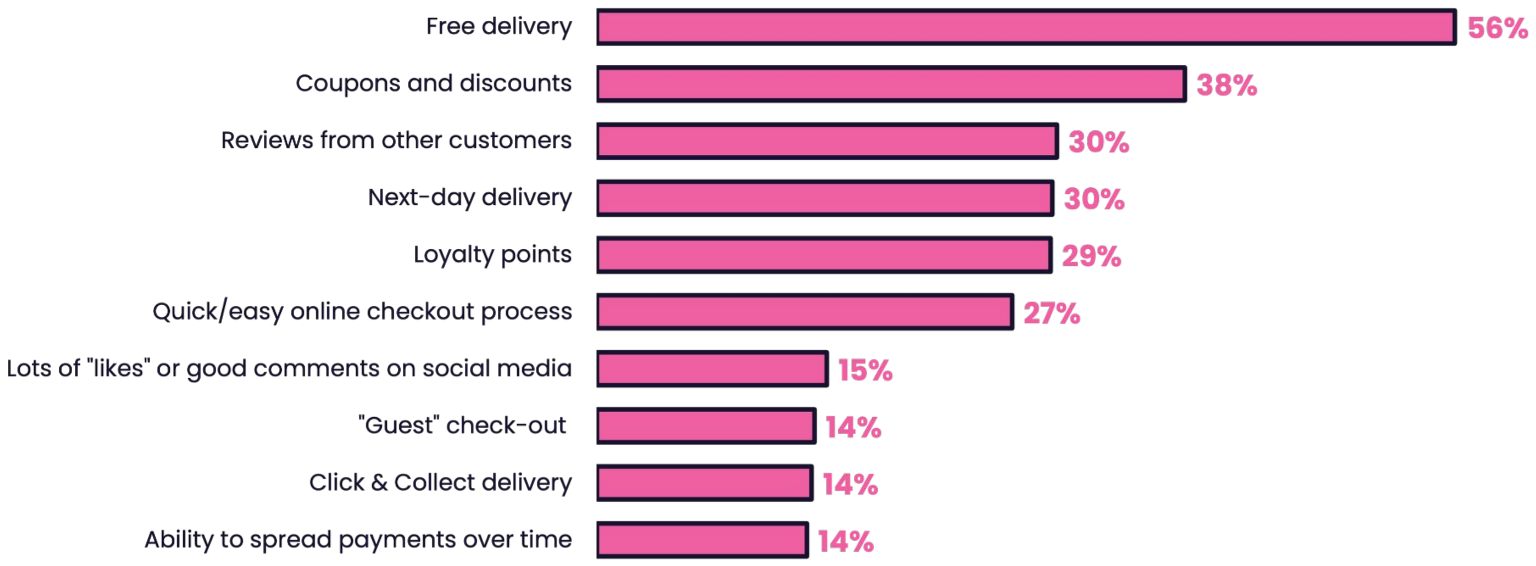
Source: GWI Core Q2 2023

Spotlight on

Shoppers in EMEA

They’re keen on free perks

% in EMEA who say the following would increase their likelihood of purchasing a product online



Source: GWI Core Q2 2023

The lowdown on loyalty

Loyalty points are a growing purchase driver in EMEA

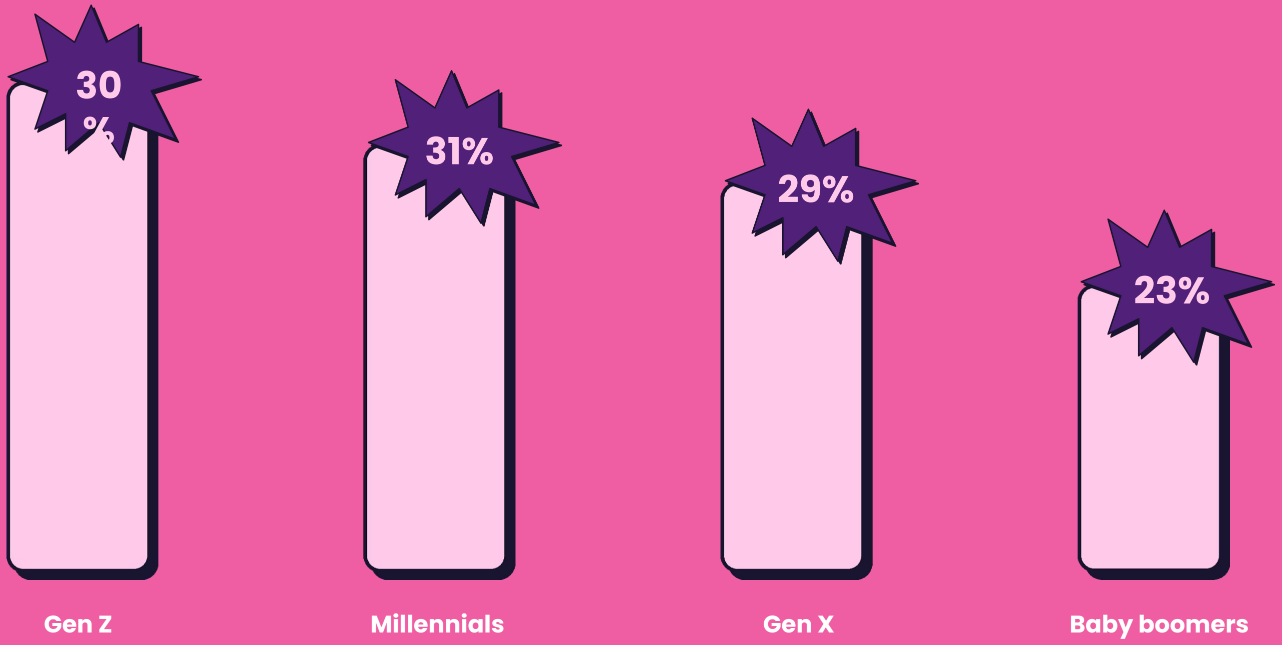
03

Why people buy

The psychology of shopping

Retail therapy: the real picture

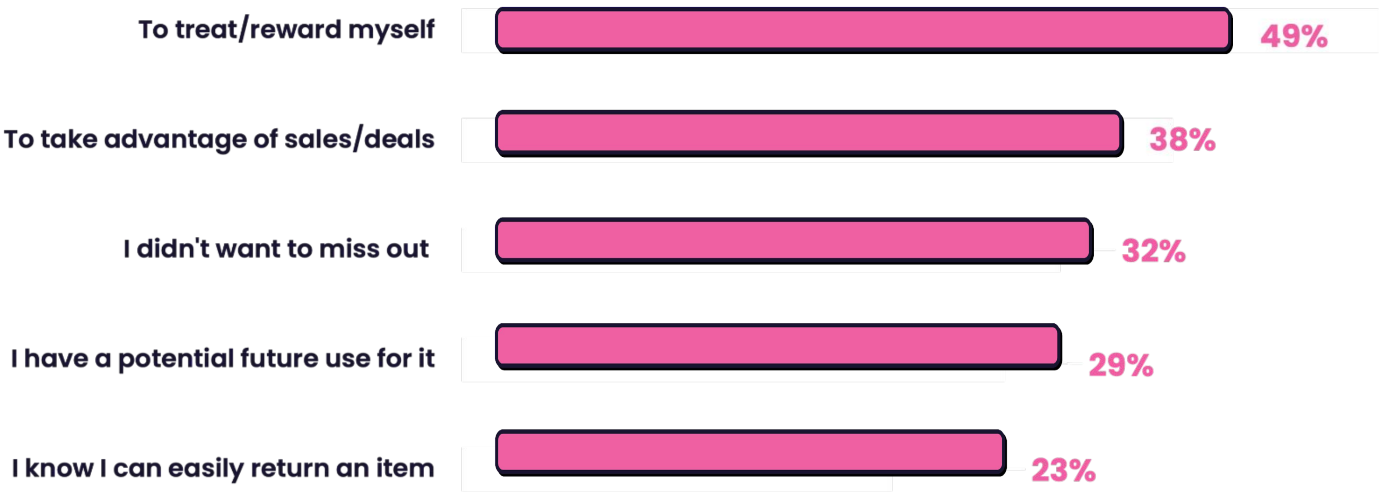
% in Europe who say they make impulse purchases once a month



Source: GWI Zeitgeist August 2022

Mood-boosting treats for the win

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

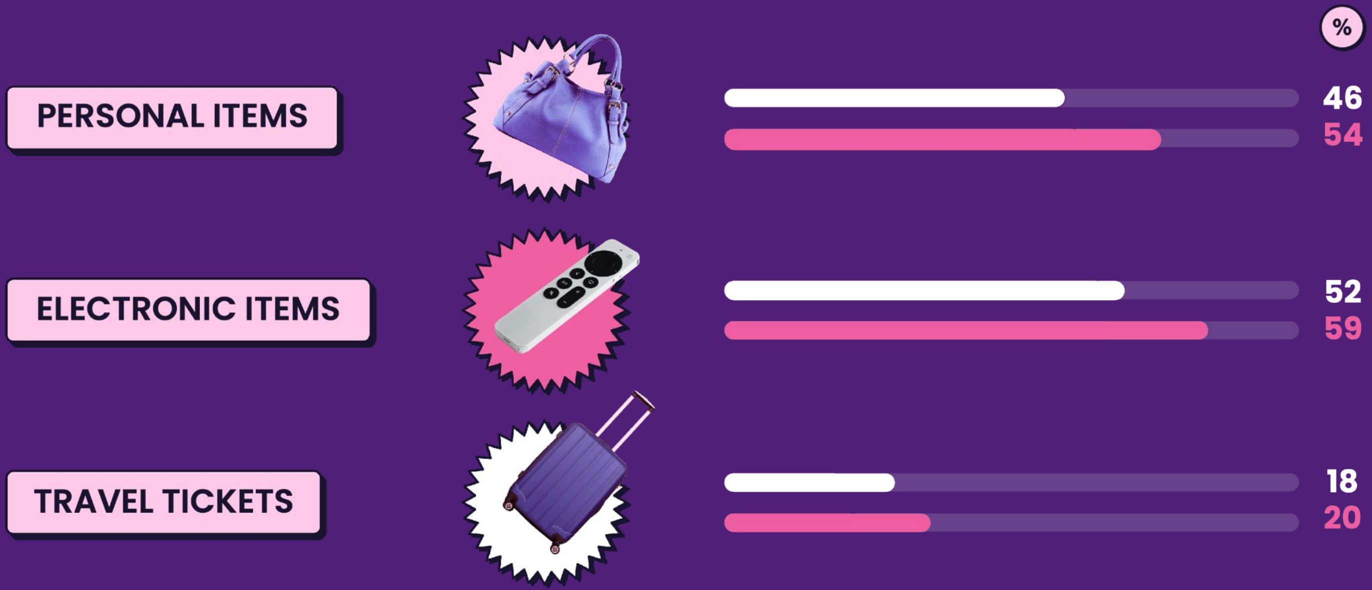


Source: GWI Zeitgeist August 2022

What are the hot ticket impulse buys?

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

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



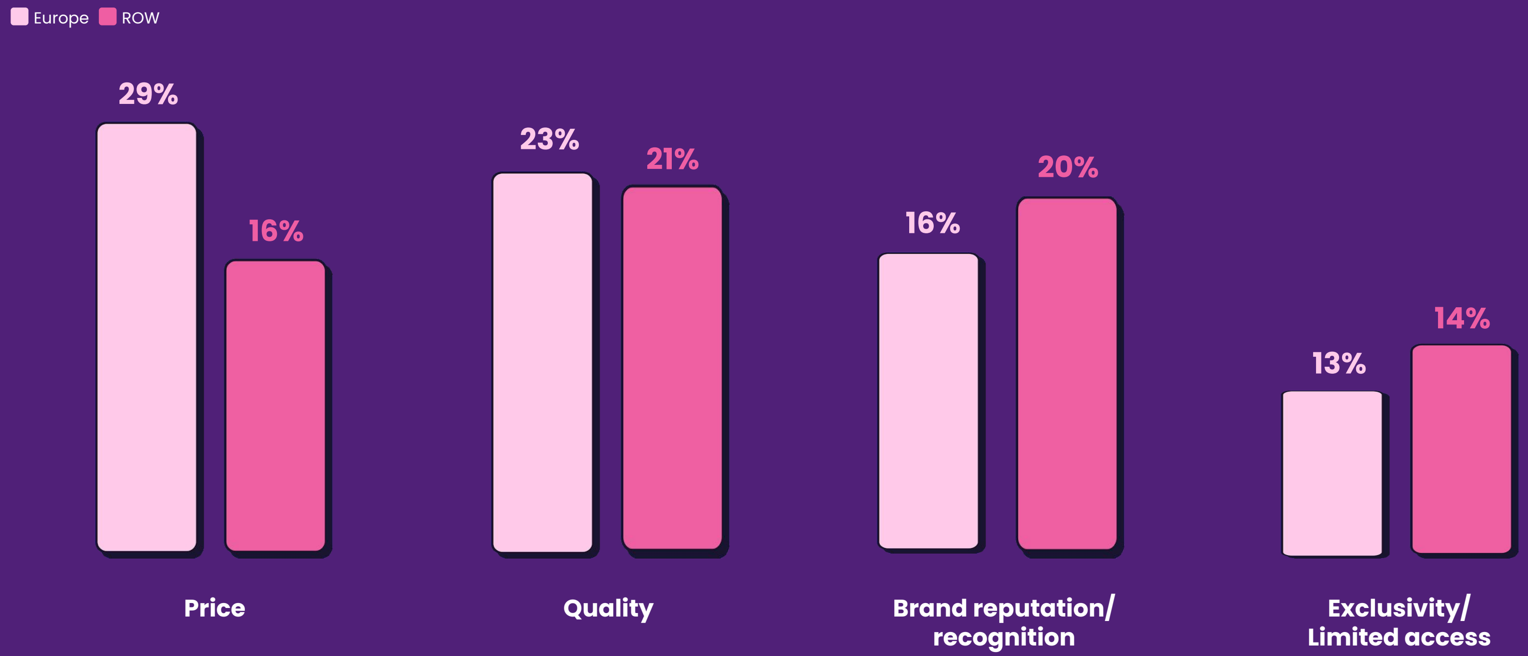
Source: GWI Core Q1 & Q2 2023

Spotlight on

Luxury purchases

How Europeans define luxury

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

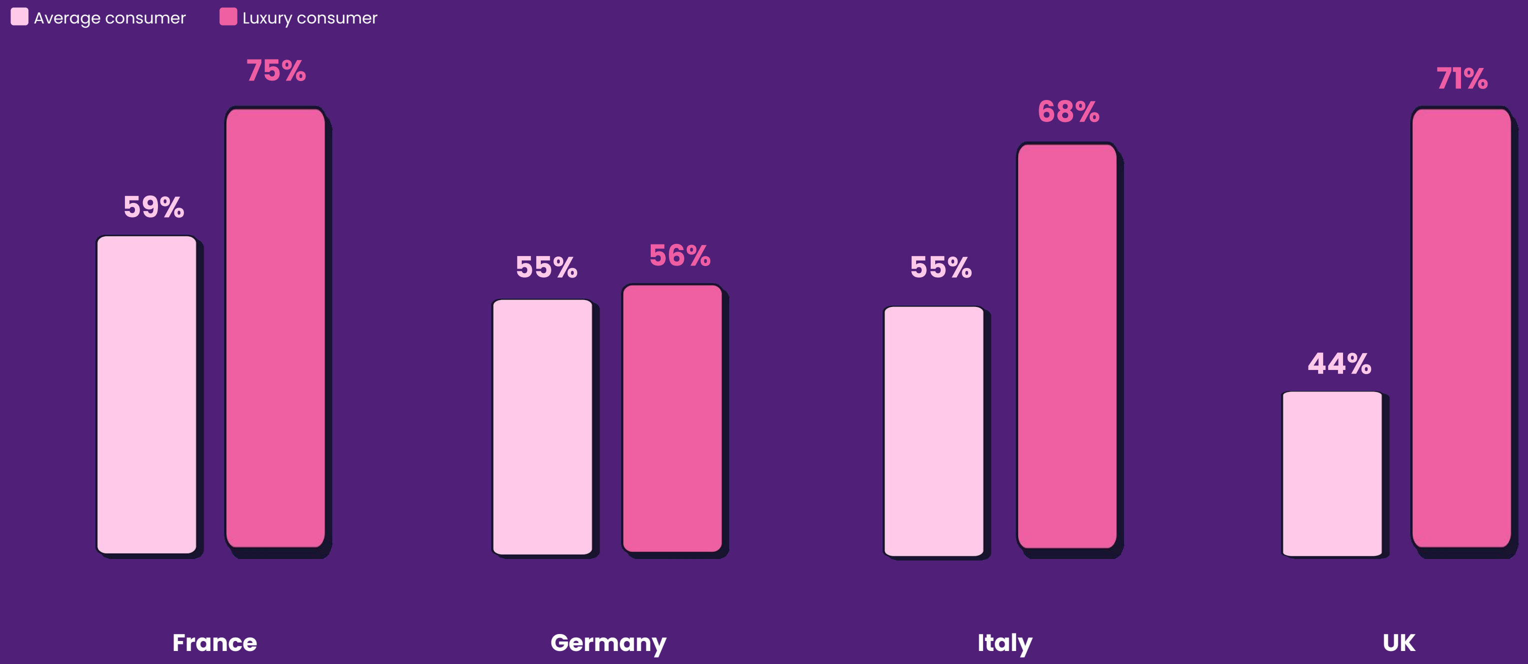


Source: GWI Core Q2 2023

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

The strive for high-end is fueling dupe culture

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



Source: GWI Zeitgeist July 2023

58% of luxury buyers in Europe say they've purchased a second-hand product in the last year

Key takeaways

01 Active research is in down

02 Though price is on the mind, so is treat purchasing

03 Social commerce is Fueling impulse buying

04 Consumers in EMEA are big on luxury, even if it’s not the real deal

Thank you

Got questions?

lhussain@gwi.com

GWI.

Custom Success Story

DIGITAS

Honor Moshay

Analytics Director, Digitas UK

Mary Hudson

Analytics Director, Digitas UK

Digitas Primark bespoke study:

Unlocking growth through audience segmentation

Primark

428 stores in 18 markets

COVID-19: Primark predicts £1.5bn sales hit from lockdown store closures

The store-only fashion chain's lost sales are predicted to exceed £1.5bn as bosses continue to refuse to trade stock online.

James Sillars
Business reporter @SkyNewsBiz

Thursday 25 February 2021 17:50, UK

Challenges

1

Primark strategy is product first - deeper insight into the behaviours and motivations of their audience was required to improve contact strategy

2

Media measurement is focused on incrementality – we needed to find and understand the correct target audience(s) to unlock growth

3

The current Primark CRM database, though rapidly growing, was limited and not yet useful for a 1st Party data led segmentation

"To help Primark maximise digital channel incrementality by creating **data-grounded, actionable segments** that can be applied across Primark

Benefits

1

Representative Sample

Nationally representative sample of 18-65's

2

Survey Focus

Recontact survey could be focused on Primark, whilst leveraging wealth of core GWI profiling and lifestyle data

3

Cost Effective

Cost effective way to reach a statistically significant volume of respondents to create 5-7 clusters

Methodology

1,000 respondents recontacted

10 mins survey length

Across 8 key departments

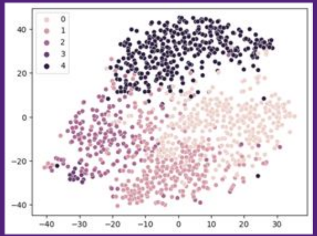
Everyday / New season - Women	Everyday / New season - Men
Kids	Beauty
Home	Party
Holiday	Gifts

We asked questions covering:

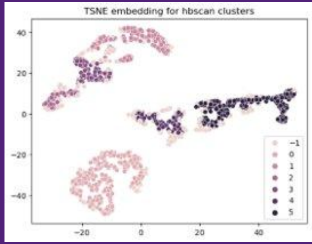
- **Spend per Shop**
- **Competitors**
- **Frequency of Shop**
- **Motivations to Shop**
- **Primark relationship**

Methodology

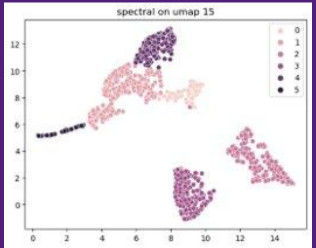
Iterative approach to segmentation



K-Means



HDBSCAN



Spectral

Matched our segments back to GWI's core survey

Summary

Demos

Media

General Shopping

Departments

Findings

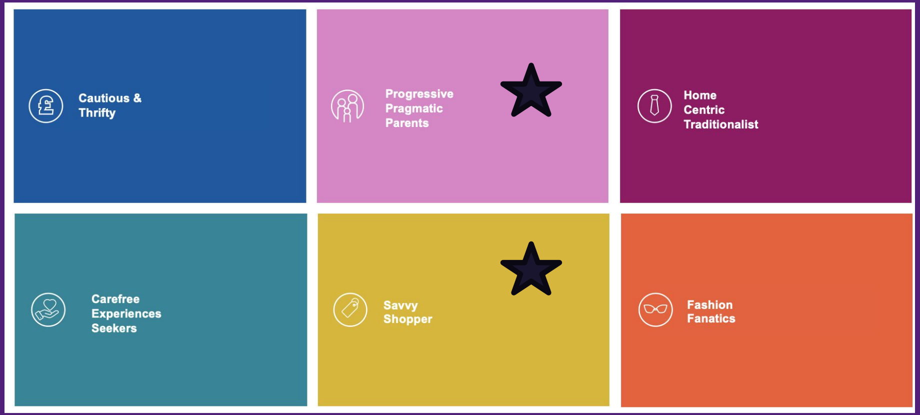
Shopping behaviour was heavily impacted by;

- Life-stage
- Income
- Attitudinal

Findings

The typical Primark shopper –Fashion Fanatic's that are targeted on organic social and exposed through UGC - accounts for <10% of shoppers.

There is a growth opportunity in the over-45's who are buying for themselves and their children.



Findings

Targeting Progressive Parents vs BAU audience with a site traffic KPI

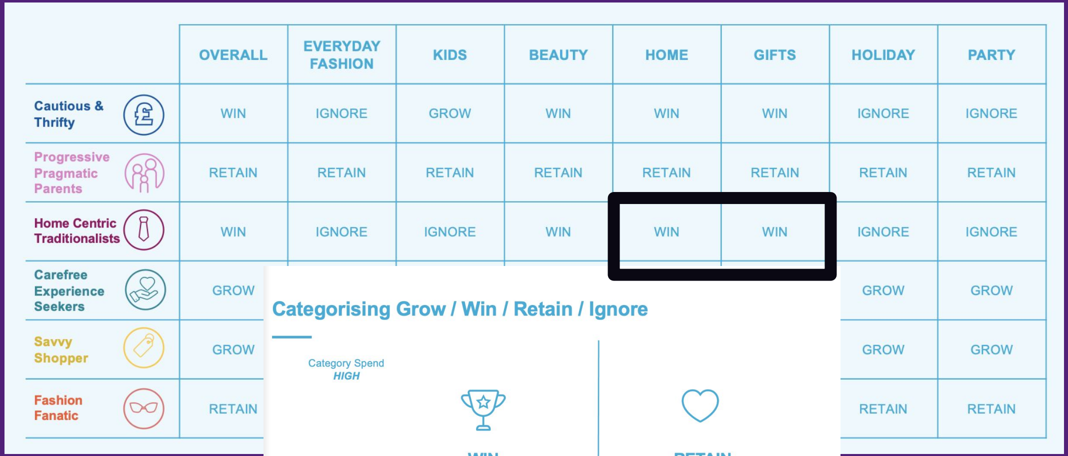
- 8-point decrease in bounce rate
- 20% uplift in time on site
- 23% uplift in pages viewed

2 x engagement with Stock Checker

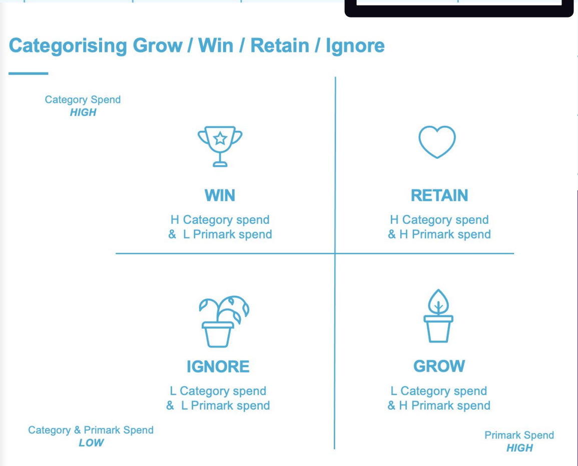
Findings

Plotting category spend against Primark spend across departments allowed us to spot the highest revenue driving opportunities.

Home, gifts and beauty – under penetrated departments.



	OVERALL	EVERYDAY FASHION	KIDS	BEAUTY	HOME	GIFTS	HOLIDAY	PARTY
Cautious & Thrifty	WIN	IGNORE	GROW	WIN	WIN	WIN	IGNORE	IGNORE
Progressive Pragmatic Parents	RETAIN	RETAIN	RETAIN	RETAIN	RETAIN	RETAIN	RETAIN	RETAIN
Home Centric Traditionalists	WIN	IGNORE	IGNORE	WIN	WIN	WIN	IGNORE	IGNORE
Carefree Experience Seekers	GROW						GROW	GROW
Savvy Shopper	GROW						GROW	GROW
Fashion Fanatic	RETAIN						RETAIN	RETAIN



Findings

Primark's new C&C campaign leant into one of the segmentation findings – that the top two highest affinity segments are up to 5X as likely to be motivated by browsing the new season for everyday fashion.

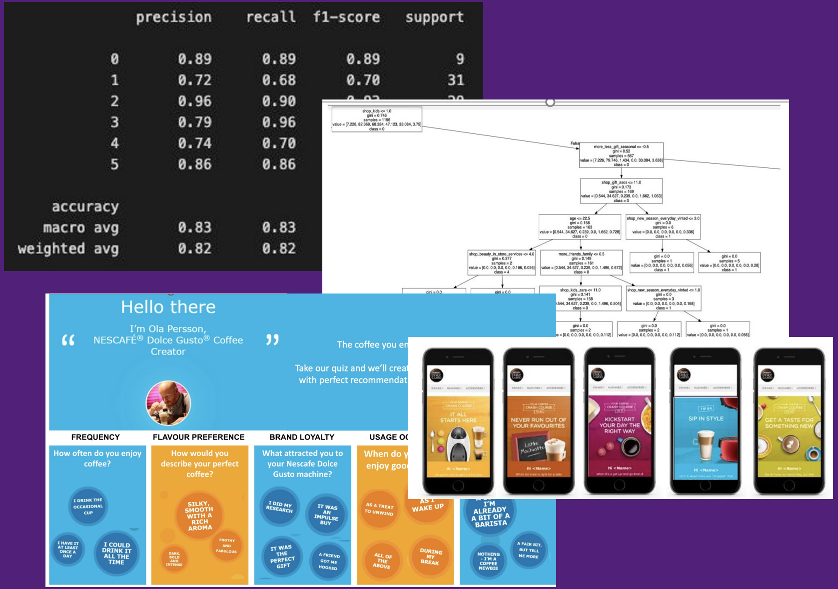
- Highest CTR from email
- +50% higher traffic than previous most popular email
- 46% higher conversion to stock check

Aligning with CRM

Golden questions created to categorise CRM sign-ups to segments

Next Step:

Roll out of Fun quiz to Primark's CRM base.



Results

1

Primark have deeper insight into who their audience are and their behaviours and motivations informing messaging and creative in contact strategy

2

Primark know which audiences to target within each department to focus on incrementality and initial campaigns have generated strong returns

3

Primark have the process to identify and activate segments across media and CRM

Further iterations

Insurance Client

Our insurance client needed a similar segmentation but wanted to **focus on attitudes rather than purchase behavior,** we used the same methodology with a new lens of focus that led to...

- Emphasis on the core values of each segment to enable our client to communicate using the right tone and language
- Development of a comprehensive strategy tailored specifically to each of the five identified customer segments
- Empowerment of our client to effectively target and engage with each segment, ultimately driving more personalized and effective customer interactions.

And More....

Please reach out for any questions on how this could be applied to your clients or further details on our methodology

Honor Moshay

Honor.Moshay@digitas.com

Mary Hudson

Mary.Hudson@digitas.com

Q&A

10 minutes 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 **prizes** 👀
- **No eliminations** - we'll play until the end
- **No cheating** - duh
- **Every person** for themselves - there's an 'i' in winner ok people?
- We're playing on **Kahoot** - to join the game, use [this code]()

  www.kahoot.it

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How to get started

Join at www.kahoot.it
Game PIN:

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Who wants to be a *GWI*llionaire?

Round 1

GWI Core

In the last year, what was the % increase for consumers in EMEA who say that click & collect delivery is important to them?

A. 23%

C. 6%

B. 12%

D. 17%

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Who wants to be a *GWI*llionaire?

Round 1

GWI Consumer Tech

What % of consumers say that brand experience is important to them when looking to purchase a smartphone?

A. Gen Z

C. Gen X

B. Millennials

D. Baby Boomers

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Who wants to be a *GWI*llionaire?

Round 1

GWI Zeitgeist

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What % of consumers say they made a purchase after reading a review?

A. 33%

C. 45%

B. 20%

D. 72%

Who wants to be a *GWI*llionaire?

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GWI Zeitgeist

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

Round 2

GWI Core

What % of EMEA consumers say they would pay more for an eco-friendly product?

A. 28%

C. 77%

B. 55%

D. 24%

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Who wants to be a *GWI*llionaire?

Round 2

GWI Kids

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

A. 22%

C. 37%

B. 49%

D. 28%

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Who wants to be a *GWI*llionaire?

Round 2

GWI Zeitgeist

What % of European consumers have purchased beauty products during a live shopping event?

A. 22%

C. 44%

B. 33%

D. 55%

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

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

Round 3

GWI Kids

In which European market are kids most interested in climate change?

A. UK

B. France

C. Spain

D. Italy

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Who wants to be a *GWI*llionaire?

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Who wants to be a *GWI*llionaire?

Round 3

GWI Automotive

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

A. Comfort

C. Safety features

B. Fuel efficiency

D. Performance/handling

Who wants to be a *GWI*llionaire?

Round 3

GWI Automotive

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C. Safety features

D. Performance/handling

Who wants to be a *GWI*llionaire?

Round 3

GWI Zeitgeist

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

A. Facebook

C. Youtube

B. TikTok

D. Instagram

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

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

Round 3

GWI Zeitgeist

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

A. Facebook

B. TikTok

C. Youtube

D. Instagram

$1,000,000

$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

GWI Zeitgeist

What % of European consumers say that a brand's likelihood of being sustainable relies on their carbon footprint?

A. 60%

C. 44%

B. 41%

D. 57%

$1,000,000

$500,000

$250,000

$125,000

$64,000

$32,000

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$8,000

$4,000

$1,000

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- $4,000
- $1,000
- $500
- $100

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

Round 4

GWI Alcohol

In Europe, what is the go-to drink of choice for consumers looking to treat themselves?

A. Champagne

C. Brandy

B. Beer

D. Wine

$1,000,000

$500,000

$250,000

$125,000

$64,000

$32,000

$16,000

$8,000

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$500
$100

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

Round 4

GWI Consumer Tech

In Europe, what % of consumers that own a VR product say they use it for gaming?

A. 64%

C. 49%

B. 57%

D. 37%

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

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$64,000

$32,000

$16,000

$8,000

$4,000

$1,000

$500

$100

Congratulations

We have a winner

10 minutes break

Up next:

GWI Awards

GWI Rockstars

In the last 12 months.....

Most platform logins

Most crosstab exports

Most audiences created

And that’s a wrap