# GERMANY

## GWI MARKET REPORT

Q1 2014

globalwebindex

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# INTRODUCTION

GWI Market reports track key digital behaviors and penetration levels at a national level, providing the very latest figures for topline engagement as well as analyzing patterns across demographic groups and over time.

In this report we focus on Germany, offering insights on:

- Internet access and behaviors
- Trends in mobile and tablet usage
- Engagement with social platforms
- E-commerce and the digital purchase journey
- Brand engagement

Clients can explore all of these areas further by downloading pre-cut German data packs from our Insight Store.

Unless otherwise stated, all figures are representative of the online population aged 16-64 and are an average across GWI's four waves of 2013 research.

# 01

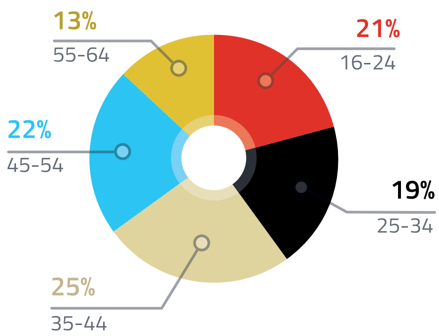
# KEY INTERNET STATISTICS

## INTERNET PENETRATION AMONG 16-64s

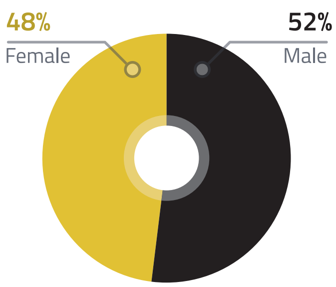
| 2009 | 2010 | 2011 | 2012 | 2013 |
|---|---|---|---|---|
| 77% | 80% | 81% | 82% | 83% |

## SIZE OF ONLINE POPULATION AGED 16-64 44.38 million

## AGE PROFILE
of Internet Users




## GENDER PROFILE
of Internet Users




## LOCATION of Internet Users

| Urban | Suburban | Rural |
|---|---|---|
| 48% | 27% | 26% |

## EDUCATION PROFILE of Internet Users

| School until 16 | School until 18 | Trade / technical school / college | University | Postgraduate |
|---|---|---|---|---|
| 19% | 44% | 11% | 24% | 2% |

# 02

# KEY DIGITAL STATISTICS

| | Germany | Global Average |
|---|---|---|
| % USING VPNs WHEN ACCESSING INTERNET (Q4 2013) | 18% | 28% |

## Top Reasons for Using VPNs (Q4 2013)

| | Germany | Global Average |
|---|---|---|
| Access better entertainment content | 32% | 52% |
| Stay anonymous when browsing | 32% | 29% |
| Access restricted sites | 26% | 43% |

## % INTERNET USERS ACCESSING VIA MOBILE

| | Germany | Global Average |
|---|---|---|
| Q4 2011 | 33% | 55% |
| Q4 2012 | 37% | 59% |
| Q4 2013 | 52% | 66% |

## Top Mobile OS

| | Germany | Global Average |
|---|---|---|
| Android | 65% | 63% |
| iOS | 22% | 19% |
| Windows | 6% | 6% |

## % Mobile Users Sharing Device with Others (Q4 2013)

| | Germany | Global Average |
|---|---|---|
| | 14% | 23% |

| | Germany | Global Average |
|---|---|---|

## % INTERNET USERS ACCESSING VIA TABLET

| | Germany | Global Average |
|---|---|---|
| Q4 2011 | 5% | 12% |
| Q4 2012 | 11% | 21% |
| Q4 2013 | 21% | 30% |

### Top Tablet OS

| | Germany | Global Average |
|---|---|---|
| Android | 54% | 51% |
| iOS | 35% | 41% |
| Windows 7 | 9% | 10% |

### % Tablet Users Sharing Device with Others (Q4 2013)

| | Germany | Global Average |
|---|---|---|
| | 55% | 54% |

## % USING SOCIAL NETWORKS

| | Germany | Global Average |
|---|---|---|
| Q4 2012 | 46% | 67% |
| Q4 2013 | 51% | 70% |

### Top Social Networks

#### Account Members

| | Germany | Global Average |
|---|---|---|
| Facebook | 70% | 67% |
| YouTube | 38% | 48% |
| Google+ | 31% | 50% |

#### Active Users

| | Germany | Global Average |
|---|---|---|
| Facebook | 44% | 44% |
| YouTube | 10% | 22% |
| Twitter | 7% | 21% |

Germany | Global Average

## TOP APP TYPES USED EACH MONTH (Among mobile internet users)

| | Germany | Global Average |
|---|---|---|
| Games | 55% | 61% |
| Social networking | 47% | 53% |
| Music | 39% | 51% |

## MOST POPULAR APPS

| | Germany | Global Average |
|---|---|---|
| Google Maps | 23% | 28% |
| Facebook | 20% | 30% |
| Amazon | 20% | 13% |

## % BUYING ONLINE (Q4 2013)

| | Germany | Global Average |
|---|---|---|
| All Devices | 78% | 65% |
| Via PC / Laptop | 73% | 61% |
| Via Mobile | 33% | 27% |
| Via Tablet | 12% | 12% |

## DIGITAL CONTENT PAID FOR IN LAST MONTH

| | Germany | Global Average |
|---|---|---|
| Music download | 21% | 24% |
| Mobile app | 14% | 25% |
| E-book | 14% | 24% |
| None | 54% | 36% |

## MOST POPULAR SOURCES OF BRAND DISCOVERY

| | Germany | Global Average |
|---|---|---|
| Press article | 43% | 50% |
| Recommendation from friend | 42% | 47% |
| Search Engine Results | 40% | 41% |

| | Germany | Global Average |
|---|---|---|

## SOURCES ACTIVELY USED TO FIND PRODUCT INFO (Q3-Q4 2013)

| | Germany | Global Average |
|---|---|---|
| Search engine | 70% | 53% |
| Product / brand sites | 37% | 36% |
| Consumer review sites | 35% | 47% |

## MOST POPULAR ONLINE BRAND INTERACTIONS

| | Germany | Global Average |
|---|---|---|
| Visit Brand Website | 43% | 58% |
| Watch a Branded Video | 34% | 27% |
| Like a Brand | 18% | 36% |

## FACTORS MOST LIKELY TO DRIVE BRAND ADVOCACY

| | Germany | Global Average |
|---|---|---|
| Being Rewarded | 65% | 66% |
| Love of the Brand | 32% | 33% |
| Relevant to Own Interests | 22% | 35% |

## ONLINE FACTORS MOST LIKELY TO DRIVE ONLINE PURCHASES

| | Germany | Global Average |
|---|---|---|
| Financial rewards, e.g. coupons/discounts | 42% | 44% |
| Loyalty points | 35% | 34% |
| Customer reviews and feedback | 30% | 43% |

## TOPICS/PRODUCTS MOST LIKELY TO TALK ABOUT ONLINE

| | Germany | Global Average |
|---|---|---|
| Mobiles | 13% | 28% |
| Groceries | 12% | 17% |
| Computers | 12% | 25% |

## BRANDS MOST LIKELY TO TALK ABOUT ONLINE (Q4 2013)

| | Germany | Global Average |
|---|---|---|
| Samsung | 8% | 9% |
| Apple | 7% | 10% |
| McDonald’s | 7% | 8% |
| Sony | 6% | 7% |
| VW | 6% | 5% |

# 03

# INTERNET ACCESS & USAGE

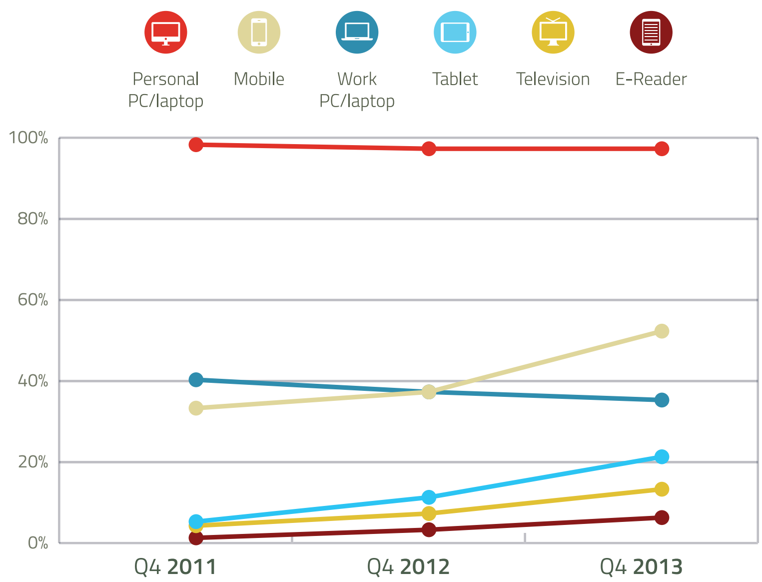
# Mobile and Tablet Internet

## The Demographics of Mobile and Tablet Internet Users

| | | MOBILE | | TABLET |
|---|---|---|---|---|
| GENDER | | 55% | Male | 23% |
| | | 46% | Female | 16% |
| AGE | | 71% | 16 to 24 | 22% |
| | | 60% | 25 to 34 | 20% |
| | | 49% | 35 to 44 | 22% |
| | | 38% | 45 to 54 | 17% |
| | | 26% | 55 to 64 | 13% |
| INCOME | | 46% | bottom 25% | 16% |
| | | 47% | mid 50% | 18% |
| | | 61% | top 25% | 29% |

In the past month, from which of the following devices have you accessed the internet either through a web browser or an application?
Source: GlobalWebIndex Q1-Q4 2013 I Base: German Internet Users aged 16-64

## Devices used to Access the Internet




In the past month, from which of the following devices have you accessed the internet either through a web browser or an application?
**Source:** GlobalWebIndex Q4 2013 I **Base:** German Internet Users aged 16-64

Although PCs/laptops remain the major internet access points, increasing numbers in Germany are going online via mobiles, tablets and smart TVs.

Mobile internet access has grown from 33% in 2011 to reach 52% by the end of 2013. But tablets have enjoyed the most explosive rates of growth – having jumped from just 5% to 21% over the same period.

There are some predictable demographic impacts to be seen. Engagement via both devices increases in line with income; within the bottom group, for example, 46% and 16% accessed the internet via mobiles and tablets respectively across 2013, figures which rise to 61% and 29% in the top income group.

In terms of age, 16-24s are the leading age group for mobiles, while 25-44s share the honors for tablets. Across both devices, men are a little ahead of women.

For further detail on this topic, please see our *GWI Device* report as well as the *Internet Device Access* data pack available in the Insight Store.

# VPN Usage

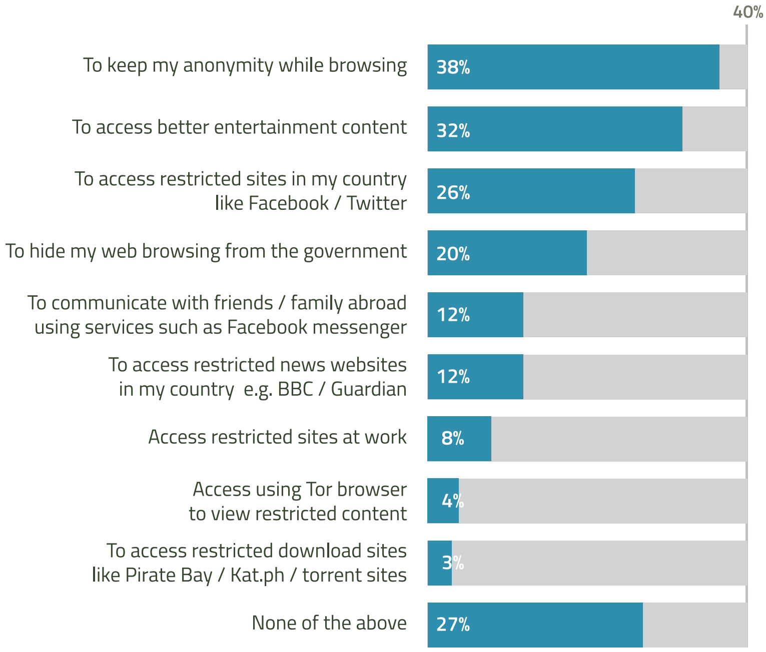
Some 18% of Germany's online population say that they access the internet via Virtual Private Networks or Proxy Servers – a figure which compares to the global average of 28% but still represents an estimated audience size of 7.93 million.

Men are more likely than women to be using them, with higher engagement levels also seen among 16-34s.

The most common reasons for using VPNs are to protect one's anonymity while browsing as well as access better entertainment content from sites such as Netflix (32% each).

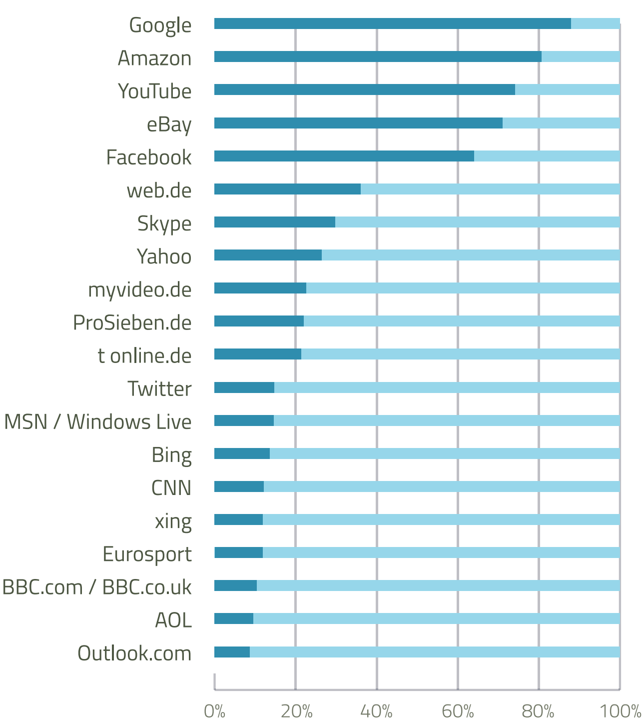
For further detail on this topic, please see our white paper dedicated to audience measurement, as well as the following data packs available in the Insight Store: *VPN and Proxy Server Usage, VPN and Proxy Servers: Usage Motivations.*

## Reasons for using VPNs




Can you please tell us why you use VPNs or proxy servers when browsing the internet?
**Source:** GlobalWebIndex Q4 2013 **I** **Base:** German VPN Users aged 16-64

## Top Websites and Applications Used




Which of the following sites/applications have you visited or used in the last month? (via any device)
**Source:** GlobalWebIndex Q1-Q4 2013 **I** **Base:** German Internet Users aged 16-64

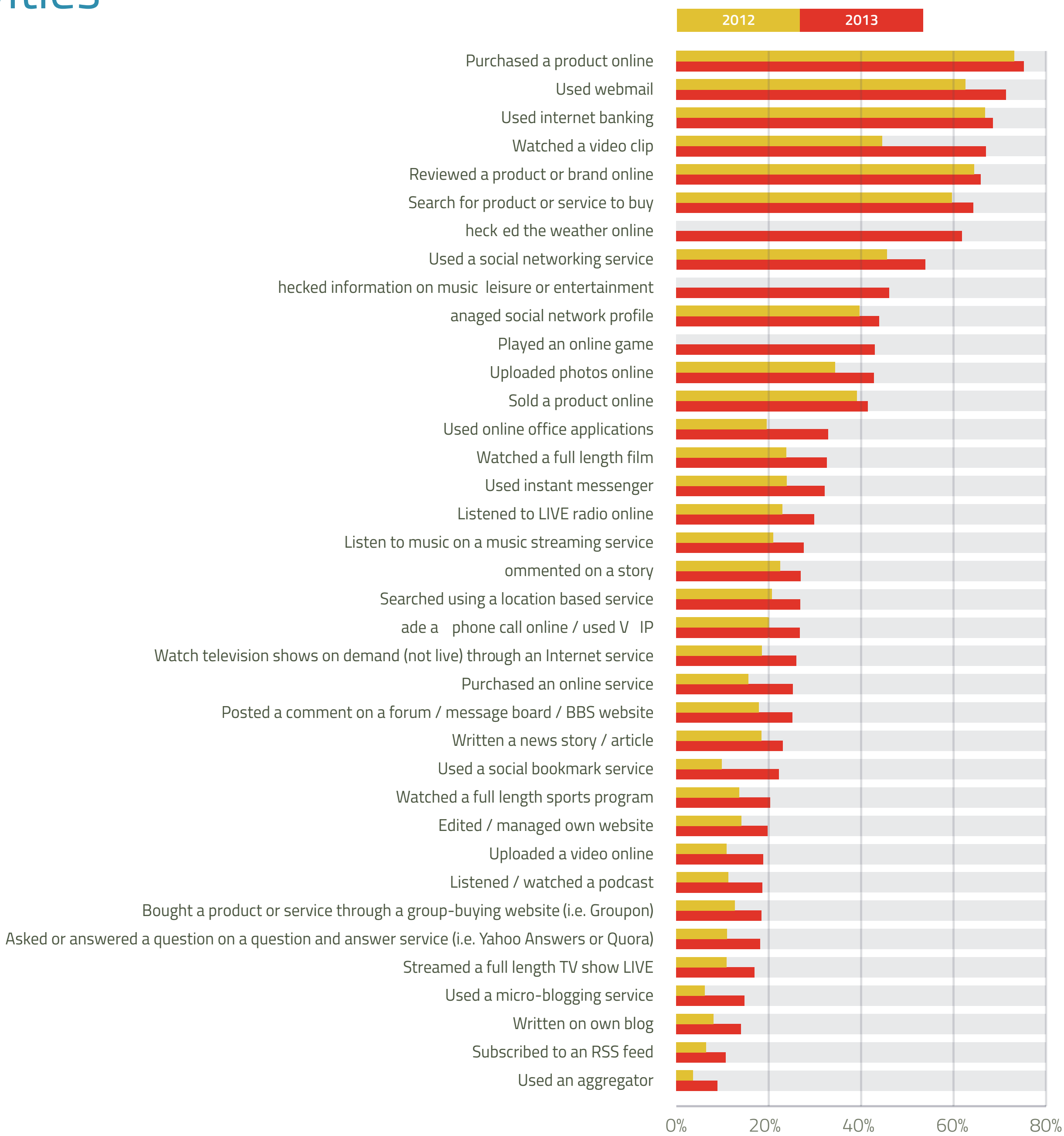
# Websites Visited

The list of the top 20 web brands being visited each month by internet users shows just how dominant Google has become – 88% of the online population are using this site. Amazon (81%), YouTube (74%) and eBay (71%) follow behind, reflecting the importance of online commerce in Germany (see next section).

Generally speaking, engagement with these sites is strongest among the youngest age groups; this trend is especially pronounced on social platforms such as YouTube and Facebook. Sites such as Amazon have more universal appeal, however.

For further detail on this topic, please see our *GWI Device* report, as well as the following data packs available in the Insight Store: *Website Visitation (PC), Website Visitation (Mobile), Website Visitation (Tablet)*. Clients with access to the Pro Platform can also look at the reach of web brands across all devices.

# Online Activities




Which of the following online activities have you done in the last month? (via any device)
**Source:** GlobalWebIndex Q4 2013
**Base:** German Internet Users aged 16-64

Across devices, purchasing a product is the most popular online activity among German internet users (75% on average, across GWI's four waves of research in 2013). More than two thirds are also using webmail, banking online and watching video clips.

Most online behaviors saw an increase in engagement between 2012 and 2013; watching videos saw the biggest jump (up by 22 percentage points), with using social bookmarking tools, using online office applications, watching films and micro-blogging also posting strong increases. At a general level it's clear that the importance of the internet as a source of content is rising.

For further detail on this topic, please see our *GWI Device* report, as well as the following data packs available in the Insight Store: *PC Activities: All Activities, Mobile Activities: All Activities, Tablet Activities: All Activities*. Clients with access to the Pro Platform can also look at the reach of activities across all devices.

# 04

# ONLINE COMMERCE

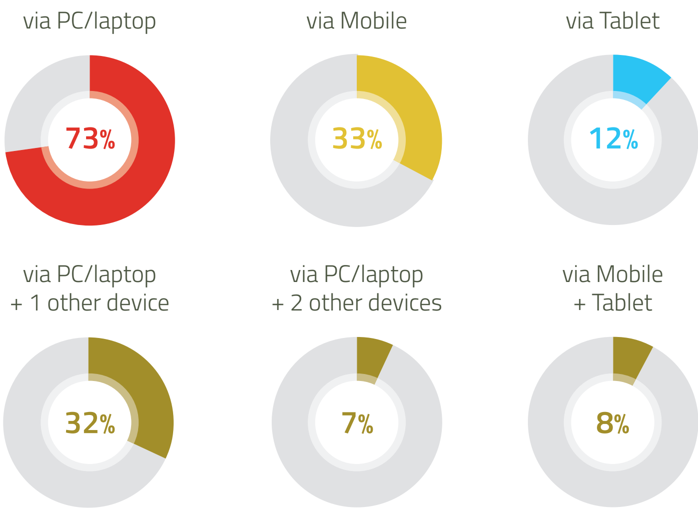
# Buying Online

At the end of 2013, 78% of German internet users had purchased a product online within the last month (via any device).

This represents a 6% increase since Q4 2011. Due to the expanding size of the total internet audience in Germany during this time, though, this translates into an 11% rise in the estimated number of online buyers (now standing at 34.62 million people).

Compared to the global picture, online commerce is particularly well developed in Germany – with figures consistently above the worldwide average. It's also worth noting that only a small percentage of internet users are not engaged with some form of commerce-related behavior: while 78% are buying online, a further 5% are researching products and then purchasing them offline. That leaves just 17% who are neither buying nor researching via the internet.

## Online Commerce




Which of the following online activities have you done in the last month?
Purchased a product online
Source: GlobalWebIndex Q4 2013 I Base: German Internet Users aged 16-64

PCs/laptops remain the overwhelmingly favorite purchase channel (73%), but a third have made a purchase through a mobile and just over a tenth (12%) have done the same via a tablet. M-commerce grew by an impressive 12% between 2012 and 2013, with the equivalent figure for t-commerce being 7%.

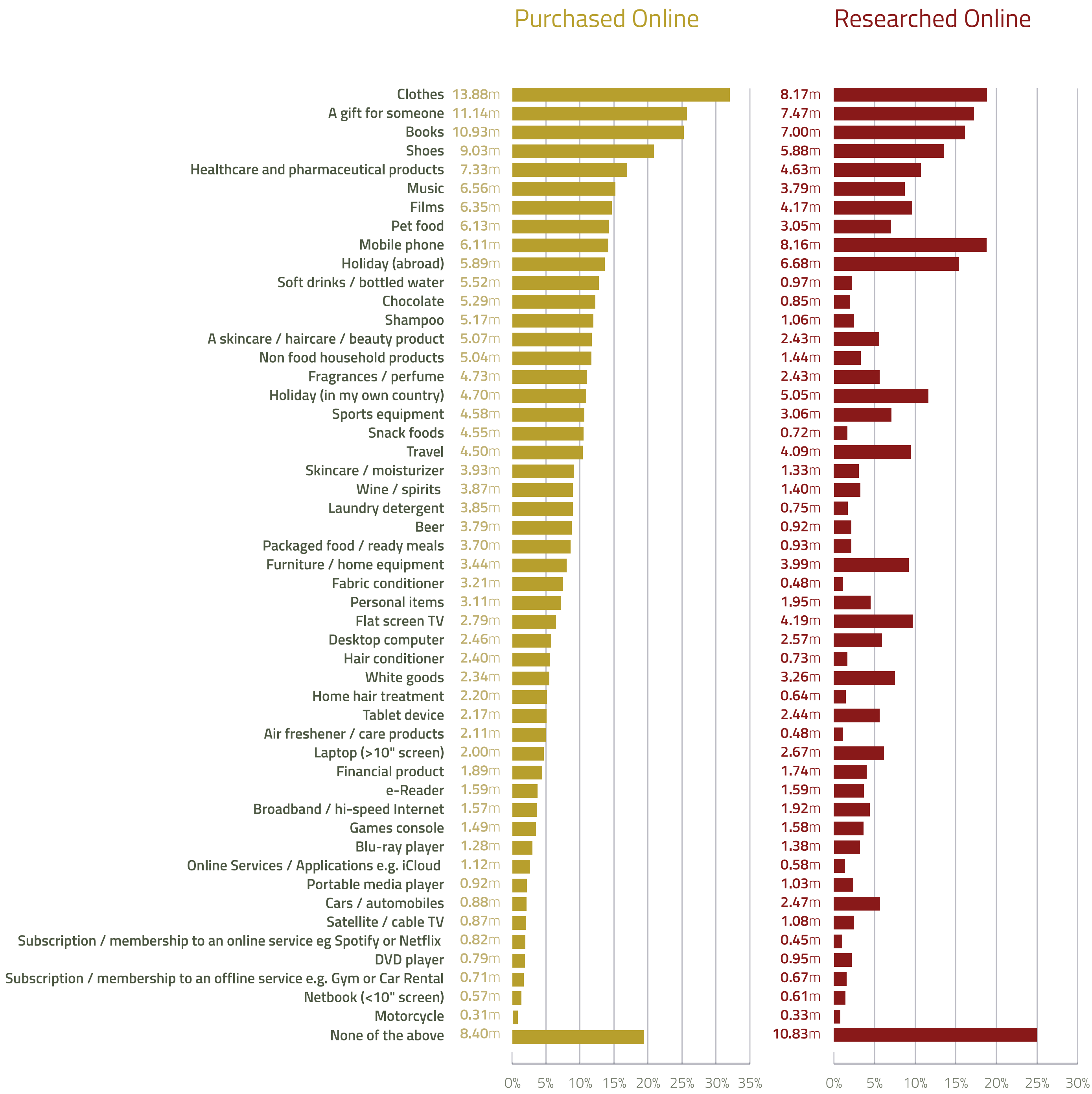
Multi-device commerce is significant too: 32% of internet users in Germany have purchased products via a PC/laptop as well as a mobile or a tablet. Purchasing across all three devices is still much less common, though; just 7% have done this.

For further detail on this topic, please see our *GWI Commerce* report, as well as the following data packs available in the Insight Store: *PC Activities: Purchased a Product Online, Mobile Activities: Purchased a Product Online, Tablet Activities: Purchased a Product Online.* Clients with access to the Pro Platform can also look at the reach of purchasing across all devices.

# Online Purchasing by Category

Clothes are the items that internet users are most likely to purchase online in Germany (32%), followed by gifts (26%), books (25%) and shoes (21%).

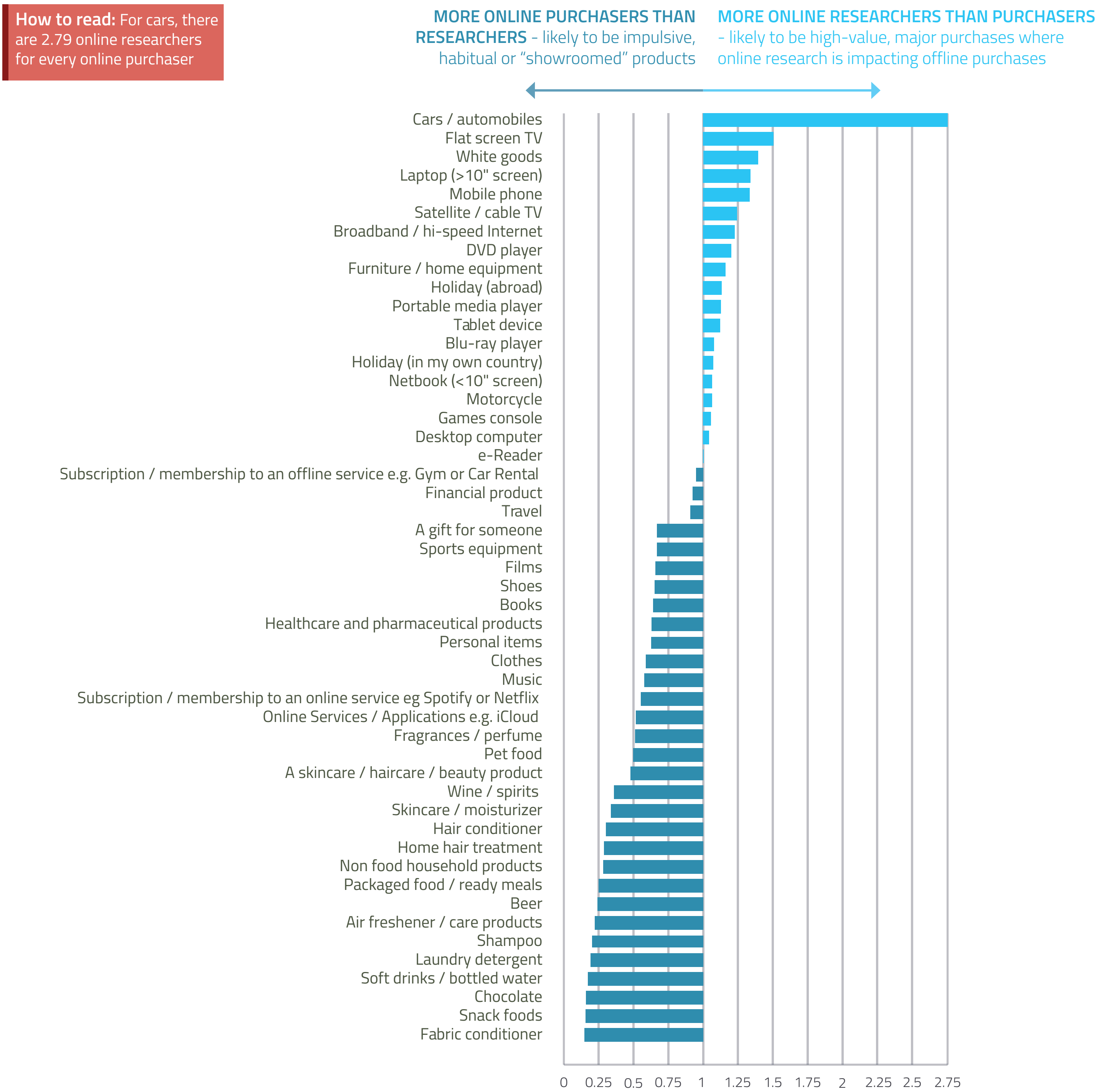
## Online Buying and Research by Category




Looking at the list of products and services below, which of the following have you purchased online in the past six months? And which of the products and services below have you researched online prior to purchasing?
Source: GlobalWebIndex Q1-Q4 2013 I Base: German Internet Users aged 16-64

When we turn our attention to which products are being researched online, a slightly different picture emerges. Certainly, some of the most commonly purchased items feature prominently here too (e.g. clothes, gifts, books); but there are also several product types where the numbers conducting online research exceed the numbers making online purchases – indicating that the internet is informing offline buying behaviors.

## Ratio of Online Purchasers to Researchers, by Category




Looking at the list of products and services below, which of the following have you purchased online in the past six months? And which of the products and services below have you researched online prior to purchasing?
Source: GlobalWebIndex Q1-Q4 2013 I Base: German Internet Users aged 16-64

Visualizing the ratio of researchers to purchasers shows that it's cars which are most likely to be investigated online and then purchased offline. The same trend is also in evidence for a number of digital and electrical products, as well as for furniture.

In these categories, many consumers are clearly webrooming – undertaking initial online scrutiny of products before visiting a physical retail environment where they can refine and test their choices in advance of committing to buy. It's no coincidence that these are high-value products where levels of emotional or financial investment are substantial.

At the other end of the spectrum, there are a series of relatively low-value and frequently purchased products – mostly from the grocery sector – where people are buying online for convenience without much active consideration. Habitual purchasing will loom large in terms of brand choices and digital strategies will need to focus on supply convenience and price-appeal more than anything else.

In some categories it's also highly likely that we're seeing a degree of showrooming – the process whereby people browse items in-store and then buy online in order to access cheaper price points. This almost certainly helps to explain why some of the people who are buying clothes, shoes, gifts and fragrances online are doing so without undertaking any research first.

For further detail on this topic, please see our *GWI Commerce* report, as well as the following data packs available in the Insight Store: *Products or Services (Paid for Online), Products or Services (Researched Online).*

# Product Reviews

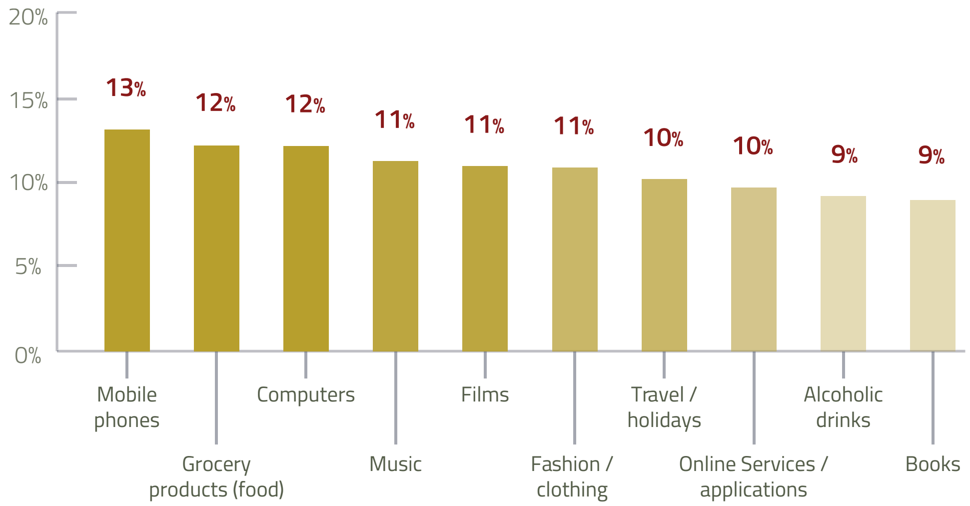
It is some 66% of German internet users who say they have reviewed a product or service online in the last month, up very slightly from 2012 (64%).

Engagement is even across the age groups, but rises in line with income (75% in the top group vs. 63% in the lower).

Perhaps unsurprisingly, posting reviews is most common among those who are purchasing items online; it rises to 80% among those buying via PC, 86% for mobile and 96% for tablet. The relatively small group who buy across all three devices are also especially active reviewers (95%).

As our chart shows, mobiles, groceries and computers are the most popular subjects being critiqued.

## Online Topics of Conversation




Which of the following products, services or topics have you posted an opinion about online in the past month?
Source: GlobalWebIndex Q1-Q4 2013
Base: German Internet Users aged 16-64

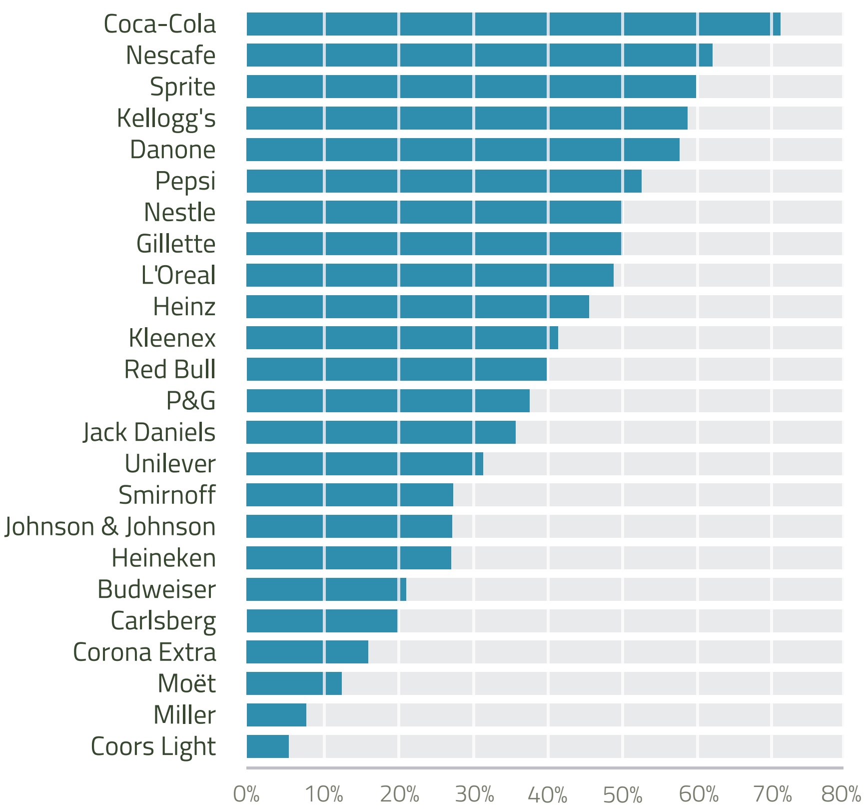
For further detail on this topic, please see our *GWI Commerce* report, as well as the following data packs available in the Insight Store: *PC Activities: Reviewed Products & Brands, Mobile Activities: Reviewed Products & Brands, Tablet Activities: Reviewed Products & Brands, Topics Posted Opinion About Online*. Clients with access to the Pro Platform can also look at the reach of purchasing across all devices.

# Online Commerce and Brands

One of the new questions in the GWI survey allows us to monitor brand awareness and advocacy across a range of categories (automotive, beverages, consumer electronics, food, FMCG, luxury and travel).

If we take FMCG and beverages as examples, our chart shows the share of online purchasers who have used products from a range of brands. This not only gives a measure of how amenable internet users might be to buying products from these brands online, but is also of interest given that – as we saw above – online purchasers are some of the most enthusiastic about writing online reviews.

## Brand Affiliation among Online Buyers




Looking at the below list of companies can you tell us if you have used one of their products?
Source: GlobalWebIndex Q4 2013
Base: German Internet Users who Buy Products Online via PCs/laptops aged 16-64

Clients with access to the Pro Platform can cut any digital behavior monitored in the GWI survey by audiences who have heard of, used, talked about or would recommend a wide selection of brands.

# 05

# SOCIAL

# Account Membership and Active Usage

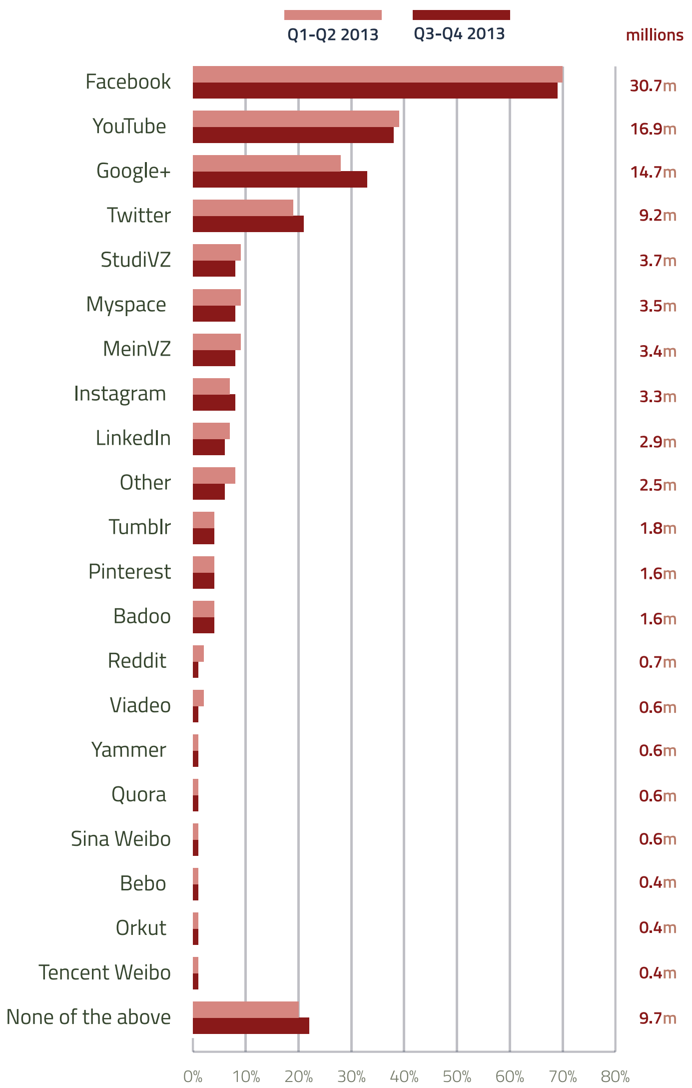
Facebook remains the number one social platform in Germany, with 69% of internet users having an account (a figure which has remained stable over the last couple of years).

Following behind are YouTube, Google+ and Twitter – but the gap between them and Facebook is considerable. Elsewhere, StudiVZ struggles to compete with the large international networks; it has an account ownership level of just 8%.

Our survey also measures active users of social platforms – those who are using or contributing to sites each month, rather than just retaining a largely unused profile. On this measure, we can see that 41% of the country's internet users are engaged with Facebook, down from 47% at the start of the year.

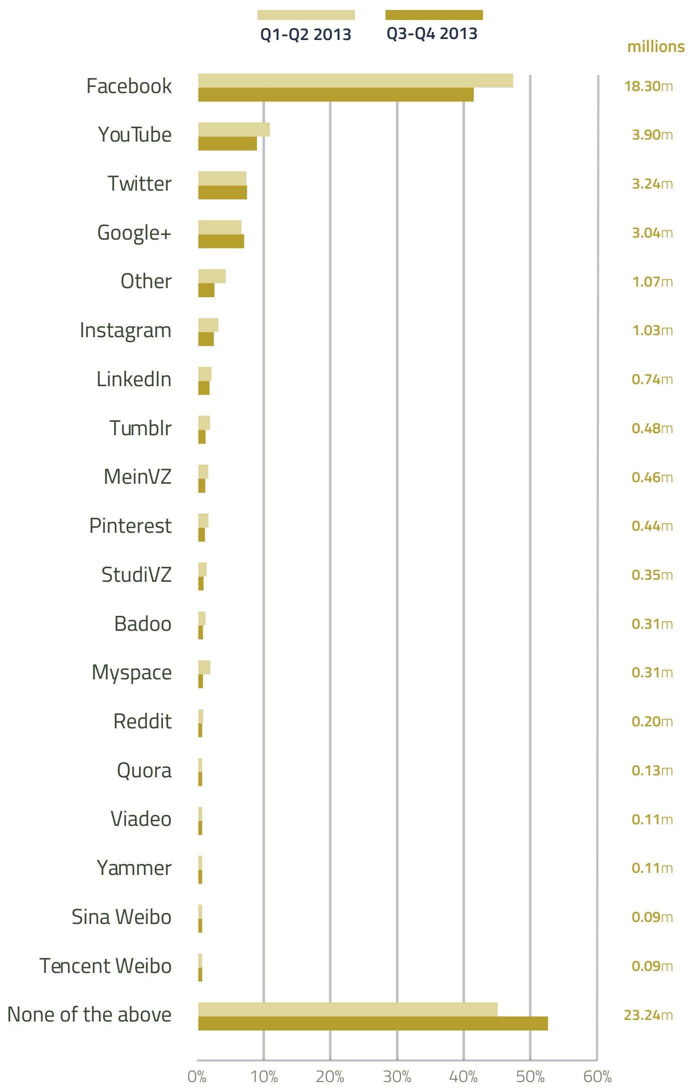
16-24s remain the most active on the site, with usage dropping a little over the period in question from 70% to 64%.

## Social Networks - Account Membership




On which of the following services do you have an account?
**Source:** GlobalWebIndex Q1-Q4 2013
**Base:** German Internet Users aged 16-64

## Social Networks - Active Usage




Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, tablet, etc.
**Source:** GlobalWebIndex Q1-Q4 2013
**Base:** German Internet Users aged 16-64

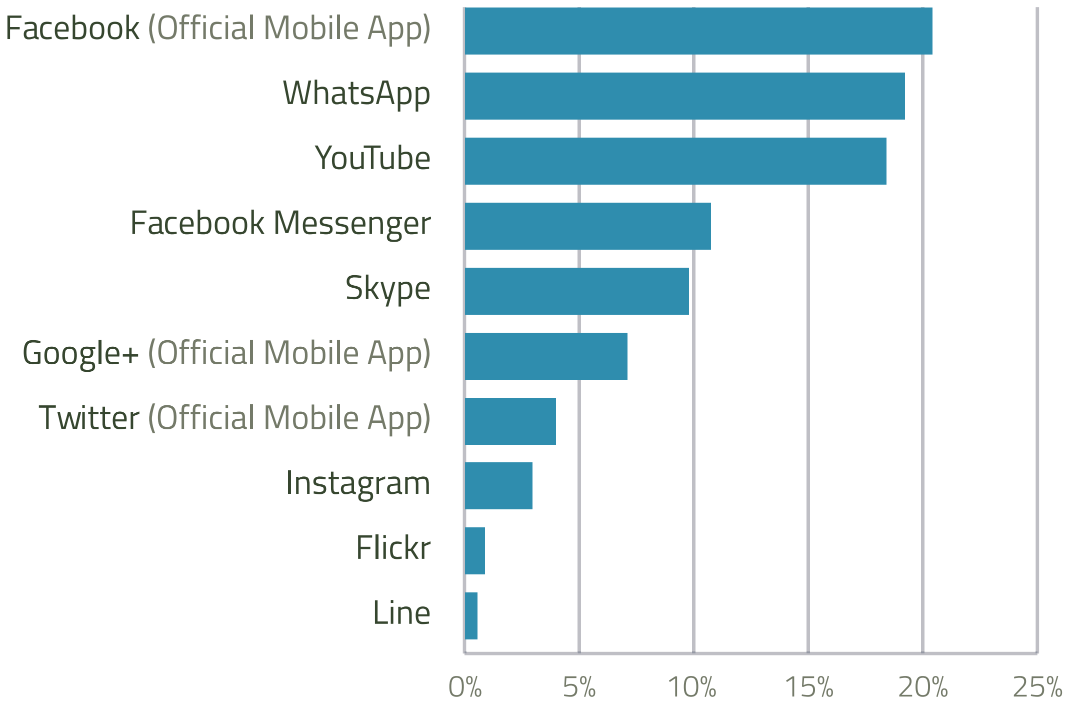
Clearly, though, Facebook remains by far the biggest site in Germany, and it's striking how low the levels of active usage are for most other platforms (typically far below the figures seen in other markets). It's also telling that the numbers saying they haven't contributed to any social site have increased from 45% to 52%; this is above the level in most other markets.

# Social Apps

In terms of social apps, Facebook dominates: 20% of the internet audience are using it each month. Interestingly, though, the gap between Facebook and YouTube is much closer in the mobile space; the latter takes third spot, with 18%. Facebook's recent acquisition, WhatsApp, is in second position at 19% – reflecting the growing importance of mobile messaging tools.

For further detail on this topic, please see our ***GWI Social*** and ***GWI Device*** reports, as well as the following data packs available in the Insight Store: *Account Ownership, Social Platforms, Active Usage, Social Platforms, Mobile Apps Active Usage: Named Apps*.

## Social and Messaging Apps

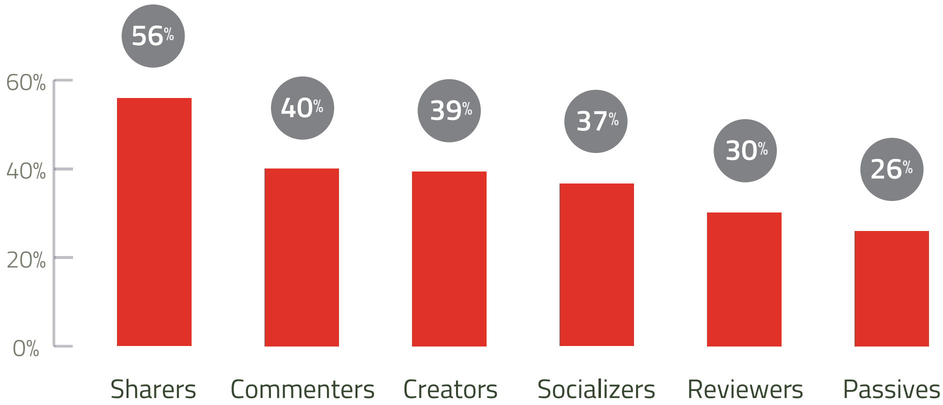



Which of the following mobile / tablet applications have you used in the past month? (on any device)
**Source:** GlobalWebIndex Q1-Q4 2013
**Base:** German Internet Users aged 16-64

# Social Sharing

Segmenting social network users based on their behaviors reveals that 56% can be characterized as "sharers" – those who are uploading photos, hitting "like" buttons, re-posting/re-tweeting or sharing content.

## Social Segmentation




**Source:** GlobalWebIndex Q1-Q4 2013
**Base:** German Social Networkers aged 16-64

Following behind in second place (40%) are the "commenters" – those who have posted questions or comments across various social platforms. A similar proportion (39%) can be classified as "creators", networkers who are uploading videos, writing stories or blogs, running their own websites or contributing product ideas to campaigns.

Just over a third fall into the "socializers" category, defined as individuals who say they use the internet to stay in touch with friends or to keep others up-to-date with their lives. And about 30% in Germany are "reviewers" – those who are posting reviews and opinions online.

The final group in the GWI Social Segmentation are the "passives"; this segment, which includes just over a quarter (26%) of social platform users, represents those not included in any of the other categories. These networkers are typically not interacting with content or fellow contacts in any major way. This figure is notably higher than in several other markets and, together with the large numbers who say they are not actively contributing to any site (above), it's clear that social networking has not been embraced as enthusiastically in Germany as in other markets.

Clients with access to the Pro Platform can cut any digital behavior or attitude monitored in the GWI survey by the social segmentation.

# 06

# MOBILE AND TABLET

# Operating Systems

## Mobile OS

Android is the number one operating system on mobiles, being used by 65% of the mobile internet audience (up from 53% in 2012).

iOS for iPhone is in second position with 22% – but this represents a slight dip over the same period.

All other operating systems account for small shares only, including Windows Phone (6%), Symbian (3%) and BlackBerry (2%).

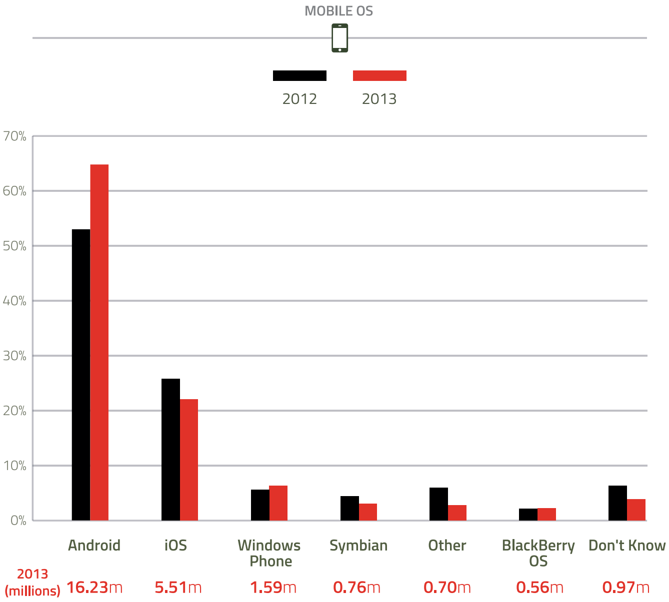
In terms of mobile OS demographics, usage is relatively even across the major demographic groups; this is in contrast to the global picture, where the figures are highest among older and lower income respondents. For iOS, 16-34s are ahead of the other groups, while the top income group also has a small lead.

## Tablet OS

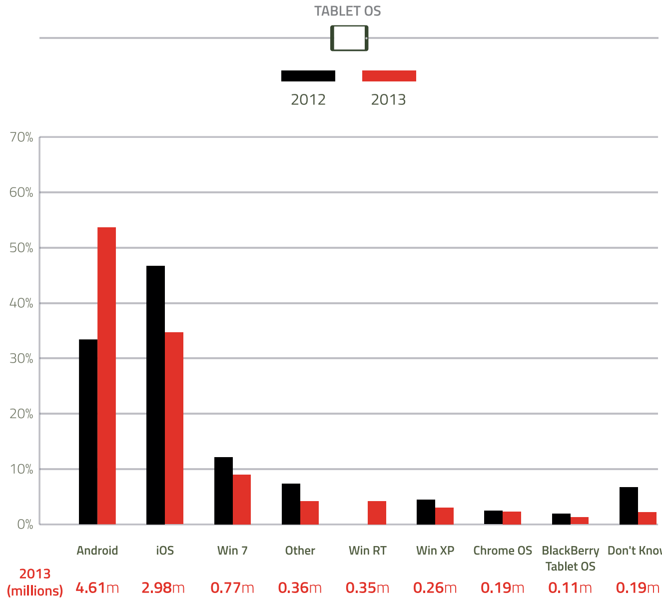
When we turn our attention to tablet operating systems, Android (54%) once again leads iOS (35%); it has also grown its share of the tablet audience consistently since 2011/12, whereas iOS now has a smaller percentage of the market.

As with mobiles, the demographic picture shows little variation across the groups, although younger Germans are more likely to be using iPads.

For further detail on this topic, please see our *GWI Device* report, as well as the following data packs available in the Insight Store: *Operating Systems (Mobile), Operating Systems (Tablets)*.




What operating system runs on your mobile?
**Source:** GlobalWebIndex Q4 2013
**Base:** German Mobile Internet Users aged 16-64




What operating system runs on your tablet?
**Source:** GlobalWebIndex Q4 2013
**Base:** German Tablet Internet Users aged 16-64

**Note:** Total figures exceed 100% due to some respondents owning/using multiple devices

# Handset Brand

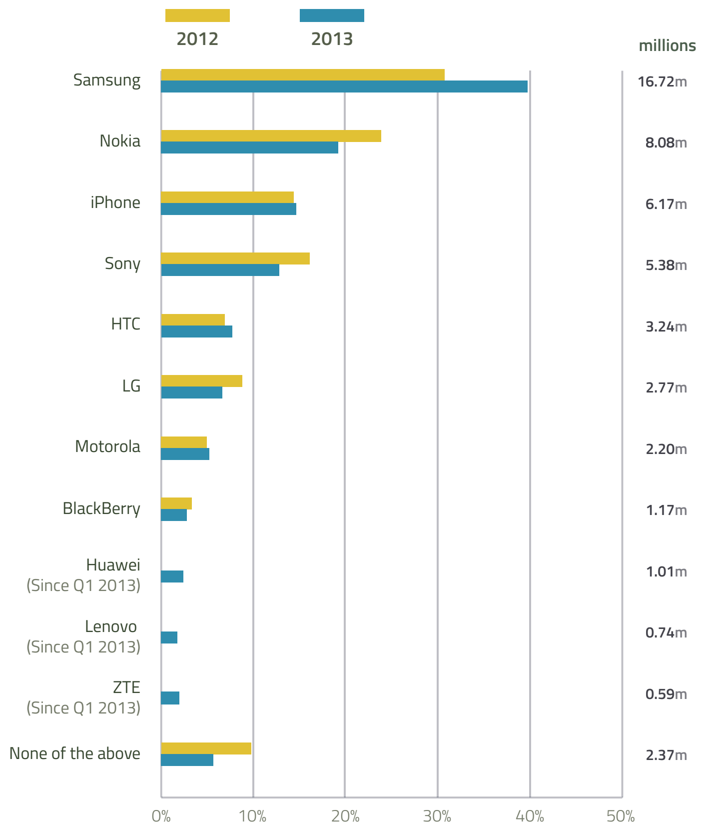
Samsung is the most popular mobile handset brand and by quite some distance: 40% say that they own one, up from 31% in 2012. Nokia is in second place (21%) but has experienced a 5% year-on-year decrease.

iPhone and Sony follow behind, both with about 15% each.

For further detail on this topic, please see our *GWI Device* report, as well as the following data packs available in the Insight Store: *Handset Brand Ownership, Handset Brand Advocacy, Handset Brand Awareness*.

Which of the following mobile brands do you currently own?
**Source:** GlobalWebIndex Q4 2013
**Base:** German Internet Users aged 16-64

## Handset




# Device Sharing

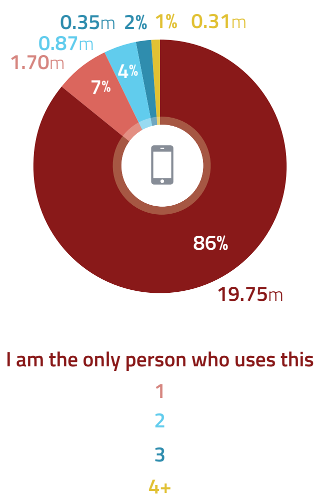
## Mobile and Tablet Sharing

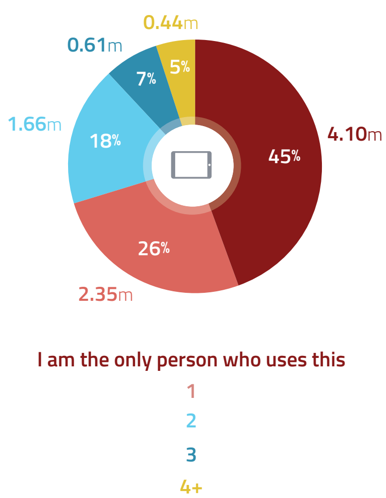
Thinking about the devices you use to access the internet, can you please tell us how many, if any, other people use each device?
**Source:** GlobalWebIndex Q4 2013
**Base:** German Mobile and Tablet Internet Users aged 16-64

Tablet sharing is widespread in Germany: fewer than 50% of tablet users are the sole owner of their device, with 26% saying that one other person has use of it and 30% reporting that two or more others have access.

Mobiles are much more personal; although 14% still say that they share their handset with other people, this figure is notably below the global average.

For both devices, levels of sharing are lowest among the top income group.




For further detail on this topic, please see our *GWI Device* report, as well as the following data packs available in the Insight Store: *Device Sharing: Mobile Phone, Television, eReader, Personal PC/laptop, Tablet Device.*

# Apps

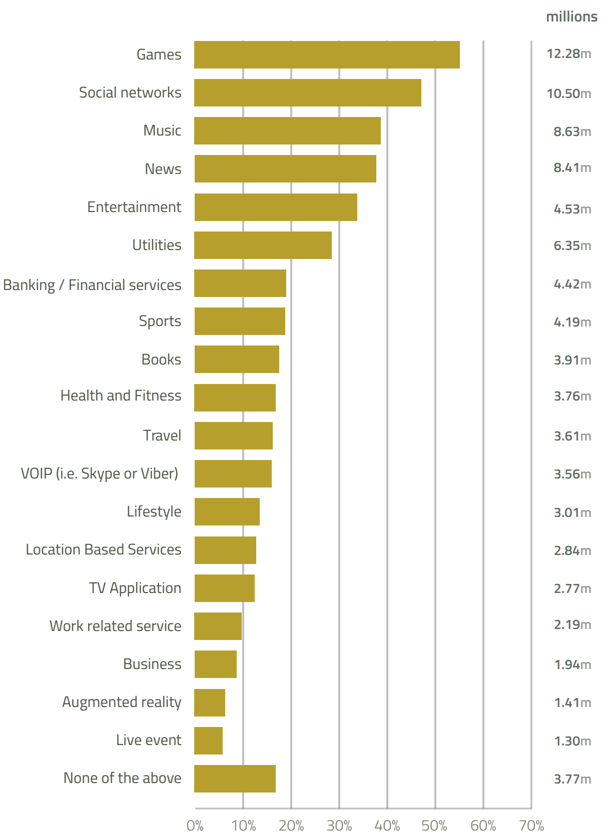
Gaming (55%) and social networking (47%) apps are the most popular among the mobile audience in Germany. Over a third are also using music, entertainment and news tools.

Generally speaking, age is the demographic indicator which has the strongest impact here; younger age groups lead for entertainment, social networking and gaming apps. However, 16-24s are the least likely to use banking apps and engagement is relatively even for news tools.

In addition to the social and messaging apps considered in the previous section, there are significant mobile audiences in Germany who are monthly users of Google Maps (23%), Amazon (20%) and eBay (19%). This reflects the importance of e-commerce in Germany, as seen above.

For further detail on this topic, please see our *GWI Device* report, as well as the following data packs available in the Insight Store: *Mobile App Types (Downloaded), Mobile App Types (Used), Mobile Apps Active Usage: Named Apps.*

## Monthly App Usage




Which of the following apps have you used in the past month?
**Source:** GlobalWebIndex Q4 2013
**Base:** German Mobile Internet Users aged 16-64

# Second-Screening

Germany is a nation of second-screeners: only 24% have not used an additional device while watching television (this is above the global average, however).

Laptops remain the favorite tool for this activity (46%) but growing numbers are also multi-screening via mobiles (35%) and tablets (14%) – both of which have risen in popularity since 2011.

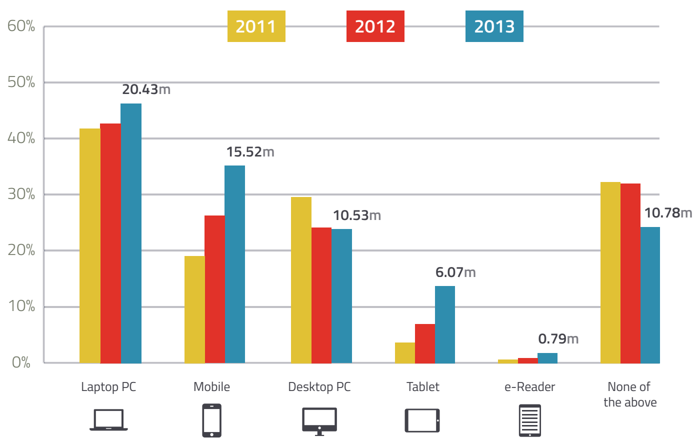
Mobile second-screening is especially widespread among 16-24s (60%, vs. 13% of 55-64s), while the age distribution is more equal for tablets.

The motivations for this behavior are multiple: 45% are reading news, about 40% are searching for products to buy or chatting to friends, about a third are playing games and a fifth are looking for information relevant to what they are watching.

There's often an age effect at work here, though: several second-screen motivations are most important for 16-34s. Exceptions to this include reading news and searching for products, which similar numbers in all age groups are doing.

For further detail on this topic, please see our *GWI Device* report, as well as the following data packs available in the Insight Store: *Multitasking While Watching TV, Second Screen Behaviors.*

## Second-Screening




Which of the following devices have you used while watching TV?
**Source:** GlobalWebIndex Q4 2013
**Base:** German Internet Users aged 16-64

# 07

# BRAND ENGAGEMENT

# Brand Interactions

From the consumer's perspective, by far the most common and popular way of interacting with a brand is by visiting its website; 43% of people say they have done this in the last month.

The chart also reveals the importance of content: the second most popular option is watching a branded video (18%). In terms of social interactions, about 15% of internet users say they have "liked" a brand/product or visited a brand's social networking page. These figures are notably below the global average – reflecting the less important role that social plays in Germany compared to in other markets. Age also has an effect here: both activities are more common among the younger age groups (and 16-24s in particular).

For further detail on this topic, please see our *GWI Brand* report, as well as the following data pack available in the Insight Store: *Brand Engagement Touchpoints.*

# Brand Advocacy

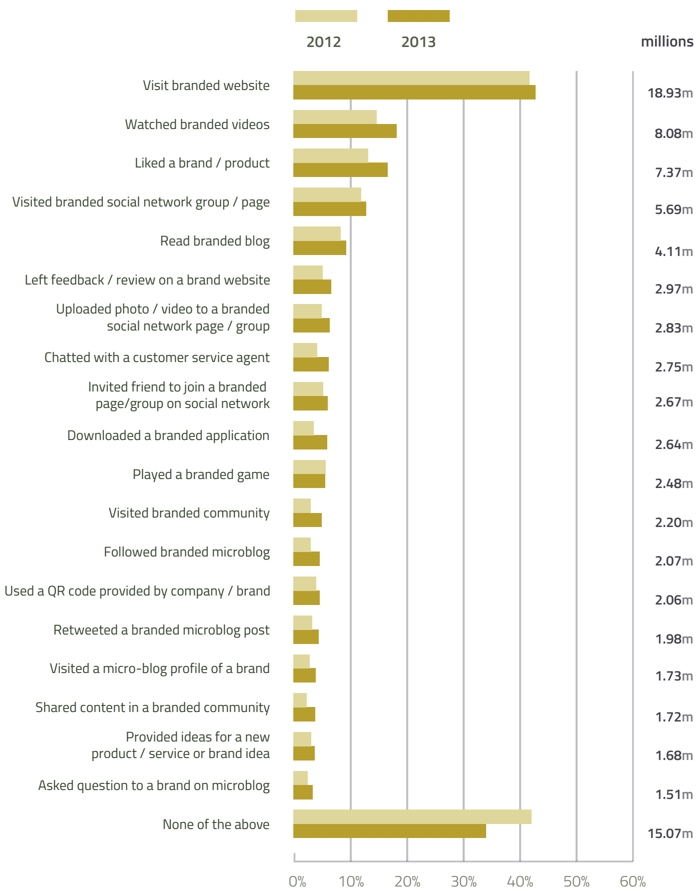
Unsurprisingly, consumers are most likely to advocate a brand online when there is a reward on offer – whether that be financial or a physical gift. This is a motivation which cuts across all demographic groups but which is slightly more compelling for women rather than men.

Elsewhere, about a third report that their love for a brand would be a reason to engage in online promotion, while around a fifth would do so when something has relevance to their own interests.

Closely related to this are the subjects about which people are most likely to post online opinions; in 2013, the most popular topics in Germany were mobiles (13%), groceries (12%), computers (12%), music (11%), films (11%), fashion (11%) and travel (10%).

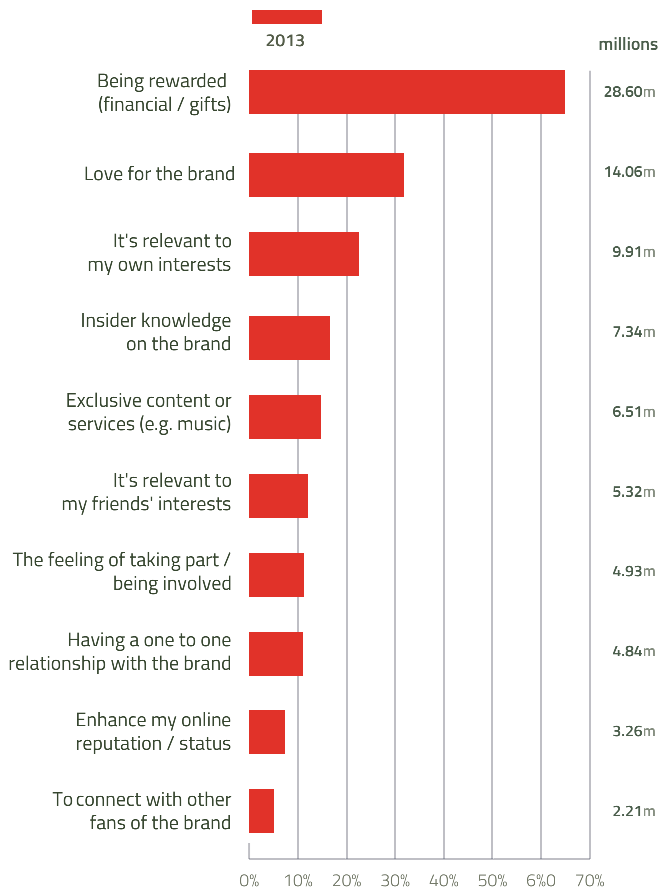
For further detail on this topic, please see our *GWI Brand* report, as well as the following data packs available in the Insight Store: *Motivations to Promote Brands, Topics Posted Opinion About Online.*

## Brand Interactions




Which of the following brand related actions have you done in the past month?
**Source:** GlobalWebIndex Q4 2013 **I** **Base:** German Internet Users aged 16-64

## Brand Advocacy




What would most motivate you to promote your favorite brand online?
**Source:** GlobalWebIndex Q1-Q4 2013 **I** **Base:** German Internet Users aged 16-64

# Brand Discovery

The importance of online magazine/newspaper articles in the brand discovery journey is clear: 43% in Germany say that they are the most common source of info about new brands or products. Following closely behind are personal recommendations (42%); this source is influential for all demographic groups but for women especially.

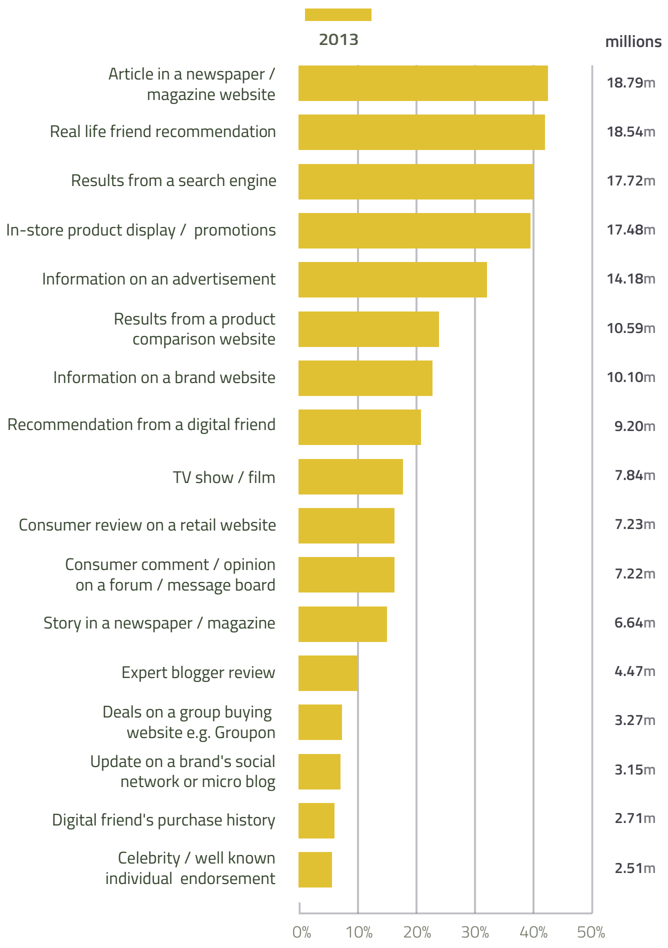
Search engines are a major discovery tool too: 40% are using them for this purpose. Interestingly, this behavior increases in line with age; differences are not profound, but it is nevertheless telling that 37% of 16-24s versus 46% of 55-64s say that they discover product info via this method.

If we turn our attention to those moments when consumers are actively looking for product or brand details online, search engines are a more dominant force. At a headline level, 70% of the online population in Germany are using them; as above, though, usage increases in line with age (64% among 16-24s versus 79% among 55-64s).

Other important online sources of info are product/brand sites (37%), consumer review sites (35%) and price comparison websites (31%).

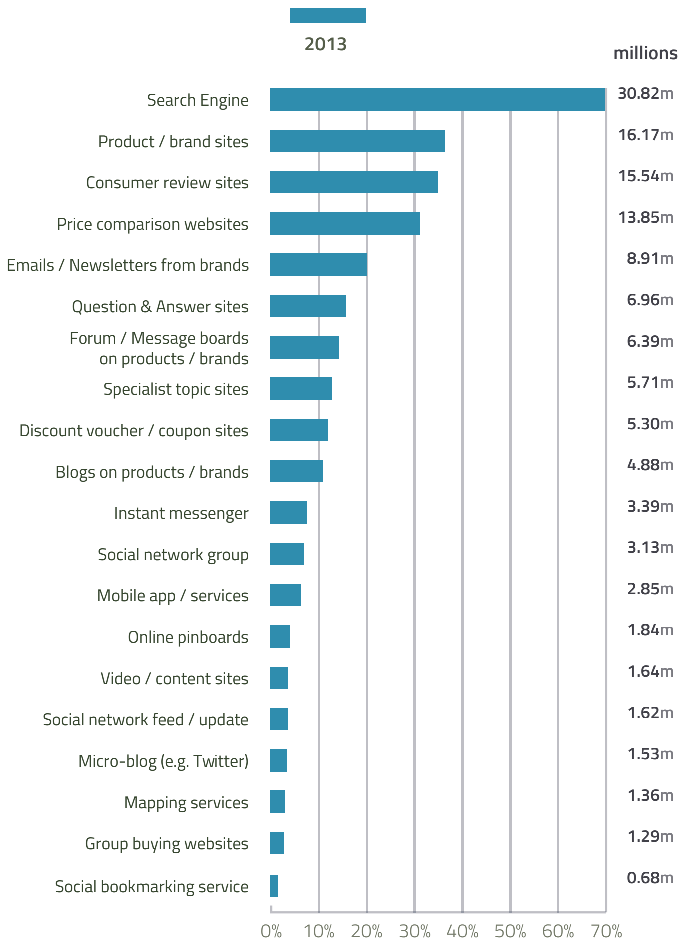
For further detail on this topic, please see our *GWI Brand* report, as well as the following data packs available in the Insight Store: *Brand Discovery Touchpoints, Brand Research Channels.*

## Brand Discovery




In which of the following ways are you most likely to find out about new brands, products, or services?
**Source:** GlobalWebIndex Q1-Q4 2013 **|** **Base:** German Internet Users aged 16-64

## Online Brand Discovery




Which of the following online sources are you primarily using when you are ACTIVELY looking to find out more information about brands, products, or services?
**Source:** GlobalWebIndex Q3-Q4 2013 **|** **Base:** German Internet Users aged 16-64

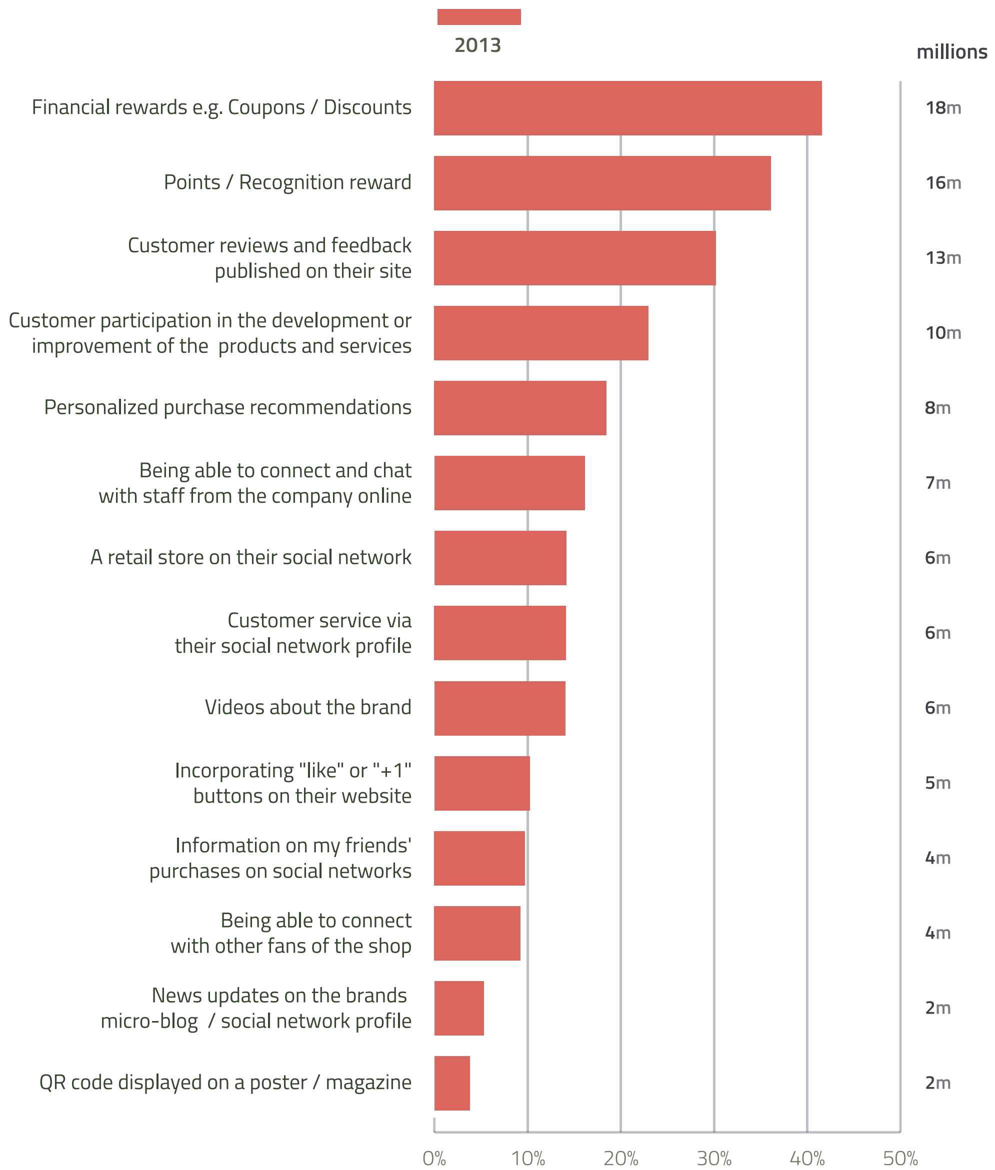
# Purchase Motivators

German internet users say that the online factor most likely to increase their likelihood of making a purchase is a financial incentive (such as a coupon/discount); this cuts across the demographic groups but is of slightly greater appeal to women rather than men.

Loyalty points/rewards as well as consumer reviews also make an important impact in this area.

For further detail on this topic, please see our *GWI Brand* report, as well as the following data pack available in the Insight Store: *Communications Power (Online Channels).*

## Purchase Motivations




Which of the following online activities from a brand are most likely to positively influence your consideration to purchase?
**Source:** GlobalWebIndex Q1-Q4 2013 **I** **Base:** German Internet Users aged 16-64

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