

# US Internet Behavior

The importance of attitudinal data in defining effective digital strategy

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# 1

## OVERVIEW

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Digital marketing success is increasingly dictated by consumers, rather than brands or agencies. In large part, this is due to the continual rise of social technologies, rich content and applications that put the user in control of the experience.

To drive marketing success in today's digital landscape, it is critical to build marketing strategies that reflect the target audience and respond to their needs, wants and desires. In a consumer-controlled environment, identity is at the heart of behavior, choices and actions.

In this whitepaper, which goes hand-in-hand with the US Internet Behaviors infographic, we set out to quantify the importance of integrating attitudes, passions and beliefs into digital audience segmentation.

<http://insight.globalwebindex.net/us-internet-behaviors>

To do this, we created a digital engagement index of 427 randomly generated target audiences, each of which contain varying degrees of attitudinal focus.

The audiences were defined by either a singular demographic, or by a demographic plus one, two and finally three self-perception statements. Digital engagement was calculated by quantifying the aggregate of each audience's behavior across 37 different key digital actions, segmented by PC, mobile and tablet.

The results, as we will see, are clear and categorical:

- 1 Attitudes predict digital behavior more accurately than demographics.
- 2 Focusing solely on demographics such as age or gender is insufficient for building accurate and effective strategies.
- 3 Attitudes are more powerful descriptors than demographics. For example, we will show that users aged 55+ (defined with attitudinal descriptors) can be more digitally engaged than a 16-24 year old.

# 2

## ANALYSIS FRAMEWORK

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We have approached the analysis by building a set of 437 audiences, using 7 core demographics (Figure 1) and 20 attitudinal statements (Figure 2). The attitudes refer to users that “Strongly Agreed” with the statements in our market research study.

All analysis was conducted using USA data collected in the Q2 2013 wave of the GlobalWebIndex. The sample base was 7,500 internet users aged 16-64.

Figure 1: **CORE DEMOGRAPHICS**

MALE
FEMALE
16-24
25-34
35-44
45-54
55-64

Figure 2: **ATTITUDINAL STATEMENTS (“Strongly Agree”)**

Once I Find A Brand I Like I Tend To Stick To It
I Tend To Buy The Premium Version Of The Product
I Always Strive To Achieve More In Life
I Am Comfortable Borrowing Money
I Look After My Appearance/Image
I Would Consider Myself To Be Much More Affluent Than The Average
I Would Pay More For Sustainable/Eco Friendly Products
I Feel More Insecure Leaving The House Without My Mobile Phone Than My Wallet
I Am A Risk Taker
Family Is The Most Important Thing In Life
I Like To Stand Out In The Crowd
I Am A Brand Conscious Person
I Am Indifferent To What Is 'In' Right Now/What Is Popular
I Like To Keep Up With The Latest Fashions
I Tend To Make Decisions Quickly, Based On 'Gut Feeling'
Money Is The Best Measure Of Success
I Am Interested In Other Cultures And Countries
I Find That I Am Easily Swayed By Other People
When Buying Products And Services, I Always Like To Seek An Expert Opinion Before Purchasing
It Is Important For Me To Feel Respected By My Peers

The demographics and attitudes were combined in the following format, with all attitude statements allocated randomly. The only rule was that a statement could not be included twice in the same audience. This creates 437 permutations of the statements and demographics.

Figure 3: **STRUCTURE OF AUDIENCE DEFINITIONS**

Demographic						
Demographic	AND	Statement 1				
Demographic	AND	Statement 2	AND	Statement 2		
Demographic	AND	Statement 3	AND	Statement 3	AND	Statement 3

We took this approach to remove any demographic or statement bias.

Therefore, the analysis focuses purely on defining the impact that additional attitudinal definition has on predicting digital behavior.

Having created the 437 audiences, we constructed an aggregate behavior score for all of the 37 actions below (Figure 4). These actions record user behavior in the past month. We implement this approach to remove any bias. For example if we had used social actions, it could potentially bias towards younger users.

Figure 4: **INTERNET BEHAVIORS INCLUDED IN THE ANALYSIS**

Used Internet Banking
Watched A Video Clip
Checked The Weather Online [W9-W10]
Played An Online Game [W9-W10]
Used Webmail
Purchased A Product Online
Search For Product Or Service To Buy
Used A Social Networking Service
Reviewed A Product Or Brand Online
Managed Your Social Network Profile
Uploaded Photos Online
Used Instant Messenger
Checked Information On Music, Leisure Or Entertainment [W9-W10]
Asked Or Answered A Question On A Question And Answer Services (i.e. Yahoo Answers or Quora)
Listen To Music On A Music Streaming Service
Watched A Full-Length Film
Purchased An Online Service
Watch Television Shows On Demand (Not Live) Through An Internet Service
Listened To Live Radio Online
Searched Using A Location Based Service
Commented On A Story
Bought A Product Or Service Through A Group-Buying Website (i.e. Groupon)
Watched A Full-Length Sports Programme
Uploaded A Video Online
Sold A Product Online
Listened Or Watched A Podcast
Streamed A Full-Length TV Show Live
Used Online Office Applications
Edited/Managed Own Website
Used A Social Bookmark Service
Used A Micro-Blogging Service
Posted A Comment On A Forum/Message Board/BBS Website
Written Your Own Blog
Made A Phone Call Online / Used VOIP
Written A News Story/Article
Subscribed To An RSS Feed
Used An Aggregator

This was implemented for all 437 audiences. The following example shows behavior scores for Audience #330, which was constructed with the demographics 35-44 and 2 self-perception statements.

Figure 5: DIGITAL BEHAVIORS ON PC, TABLET & MOBILE FOR AUDIENCE #330

	PC - Last month	MOBILE - Last month	TABLET - Last month
Used Internet Banking	68.0	52.6	37.5
Watched A Video Clip	66.0	57.9	62.5
Checked The Weather Online [W9-W10]	66.0	84.2	75.0
Played An Online Game [W9-W10]	66.0	68.4	62.5
Used Webmail	64.0	73.7	75.0
Purchased A Product Online	62.0	47.4	37.5
Search For Product Or Service To Buy	62.0	52.6	50.0
Used A Social Networking Service	60.0	57.9	62.5
Reviewed A Product Or Brand Online	56.0	52.6	50.0
Managed Your Social Network Profile	54.0	57.9	50.0
Uploaded Photos Online	52.0	63.2	62.5
Used Instant Messenger	46.0	52.6	50.0
Checked Information On Music, Leisure Or Entertainment [W9-W10]	46.0	57.9	50.0
Asked Or Answered A Question On A Question And Answer Services (i.e. Yahoo Answers or Quora)	44.0	42.1	50.0
Listen To Music On A Music Streaming Service	42.0	47.4	25.0
Watched A Full-Length Film	42.0	31.6	37.5
Purchased An Online Service	40.0	36.8	62.5
Watch Television Shows On Demand (Not Live) Through An Internet Service	40.0	42.1	62.5
Listened To Live Radio Online	38.0	47.4	37.5
Searched Using A Location Based Service	36.0	47.4	50.0
Commented On A Story	34.0	42.1	50.0
Bought A Product Or Service Through A Group-Buying Website (i.e. Groupon)	34.0	15.8	37.5
Watched A Full-Length Sports Programme	34.0	31.6	37.5
Uploaded A Video Online	32.0	47.4	50.0
Sold A Product Online	32.0	15.8	25.0
Listened Or Watched A Podcast	32.0	42.1	12.5
Streamed A Full-Length TV Show Live	32.0	26.3	25.0
Used Online Office Applications	30.0	36.8	25.0
Edited/Managed Own Website	30.0	36.8	50.0
Used A Social Bookmark Service	28.0	15.8	25.0
Used A Micro-Blogging Service	26.0	36.8	50.0
Posted A Comment On A Forum/Message Board/BBS Website	26.0	36.8	37.5
Written Your Own Blog	22.0	31.6	50.0
Made A Phone Call Online / Used VOIP	22.0	42.1	50.0
Written A News Story/Article	22.0	15.8	25.0
Subscribed To An RSS Feed	12.0	21.1	50.0
Used An Aggregator	10.0	10.5	25.0
<b>AGGREGATE BEHAVIOR SCORE</b>	<b>40.8</b>	<b>42.7</b>	<b>45.3</b>

# 3

## Core Analysis

The analysis was conducted across 1,200 behavior scores split by 7 groups of audiences (defined by basic demographics). For the initial output we have analysed the variance for all of the scores by group.

The output below clearly demonstrates the large impact that attitude has in defining and predicting behavior. There is significant variance in terms of behavior engagement (as summarised in Figure 6) across all demographics.

Figure 6: BEHAVIOR SCORE VARIANCE BY SEGMENT GROUP (PC BEHAVIORS)



The variance is expressed clearly if we drill down into the “Male” group of audiences as shown in Figure 7 below. This demonstrates substantial and increasing variation as attitudinal statements are added.

If we drill down further we can see that the average behavior score for men as a singular demographic is 38.56%. This can be compared with the average scores for the groups of 20 audiences with attitudinal inclusion.

Figure 7: INDIVIDUAL BEHAVIOR SCORE FOR THE MALE GROUP

AGREGATE BEHAVIOR SCORE FOR PC				INDEX V SINGULAR DEMOGRAPHIC			
STATEMENT	DEMOGRAPHICS + ONE STATEMENT	DEMOGRAPHICS + TWO STATEMENTS	DEMOGRAPHICS + THREE STATEMENTS	STATEMENT	DEMOGRAPHICS + ONE STATEMENT	DEMOGRAPHICS + TWO STATEMENTS	DEMOGRAPHICS + THREE STATEMENTS
1	43.32	55.82	65.40	1	110.92	142.93	167.46
2	51.49	53.10	62.35	2	131.85	135.97	159.66
3	46.54	54.84	67.00	3	119.18	140.42	171.55
4	51.66	57.81	65.72	4	132.28	148.01	168.27
5	47.08	60.67	68.55	5	120.55	155.36	175.54
6	53.78	57.56	66.66	6	137.72	147.40	170.68
7	56.68	65.41	72.45	7	145.14	167.47	185.52
8	48.86	63.47	68.36	8	125.11	162.52	175.03
9	50.05	59.80	62.48	9	128.16	153.13	159.99
10	40.53	50.51	57.65	10	103.77	129.32	147.61
11	55.25	57.42	62.31	11	141.47	147.02	159.54
12	54.05	62.99	67.48	12	138.41	161.29	172.78
13	38.69	61.25	66.23	13	99.06	156.83	169.58
14	58.70	63.12	69.85	14	150.30	161.62	178.85
15	48.46	63.99	66.39	15	124.10	163.85	169.99
16	49.91	56.21	66.08	16	127.81	143.92	169.20
17	49.91	49.91	68.54	17	127.81	127.81	175.51
18	56.46	67.41	71.74	18	144.57	172.60	183.68
19	52.26	64.77	70.71	19	133.82	165.84	181.04
20	46.98	66.14	59.87	20	120.30	169.35	153.29



If we look at the range of scores for “Male + 1 Attitudinal Statement” we can see a maximum range score of 58.7% and a minimum of 38.7%, yielding a range of 20 points. This infers that including just 1 attitude statement can create a significant variance.

If we look at the range of scores for “Male + 2 Attitudinal Statements” we can see that the maximum behavior score increases to 67.4%, while the range decreases to 17.5 points (as the lowest score is 49.9%).

Finally if we examine the scores for “Male + 3 Attitudinal Statements” we can see again that the maximum score again increases to 72.4%, in line with an increase of the minimum score of 57.6%. Again the range decreases, this time to 14.8 points.

Figure 7a: MALE GROUP AVERAGES

		MALE
SINGLE DEMOGRAPHICS		38.56
DEMOGRAPHICS + ONE STATEMENT		
	AVERAGE %	50.03
	AVERAGE INDEX	129.74
DEMOGRAPHICS + TWO STATEMENTS		
	AVERAGE %	59.61
	AVERAGE INDEX	154.57
DEMOGRAPHICS + THREE STATEMENTS		
	AVERAGE %	66.29
	AVERAGE INDEX	171.89

Figure 7b: MALE GROUP RANGES

		MALE
SINGLE DEMOGRAPHICS		38.56
DEMOGRAPHICS + ONE STATEMENT		
	MAX	58.70
	MIN	38.69
	RANGE	20.01
DEMOGRAPHICS + TWO STATEMENTS		
	MAX	67.41
	MIN	49.91
	RANGE	17.49
DEMOGRAPHICS + THREE STATEMENTS		
	MAX	72.45
	MIN	57.65
	RANGE	14.81

This initial analysis of the Male group of audiences clearly quantifies:

- Increased attitudinal definition drives higher digital engagement scores. Differentiation is marked but always in a positive relationship
- Every audience which incorporates an attitude statement (regardless of number of statements incorporated) drives an increased behavioral engagement score
- The range of scores gets smaller as more statements get added to the audience definition

When we expand this analysis out to cover other demographic groups, the impact of increased attitudinal definition contains some interesting nuances:

▪ **Increased attitudinal definition drives higher digital engagement scores in all groups, regardless of the core demographic**

The only two exceptions are for the 45-54 year old and 55-64 year old groups, where the minimum scores are slightly under the demographic average. This represents 2 audiences, versus 435 other audiences that demonstrated positive increases in behavior scores.

▪ **Older age groups exhibit higher variation from the demographic average**

For example, the average score for 16-24s is 43.58%, increasing to just 64.44% average with the inclusion of 2 attitudinal statements. Compare this to 55-64 year olds, who have a characteristically low engagement score of 27.48% at a demographic level. With the inclusion of 2 statements, the engagement scores for 55-64 year olds rise to an average of 53.16%. If we look at the maximum scores for 55-64 year olds, this can reach 83.8%, which is the highest maximum of any demographic grouping - again demonstrating that self-perceptions are more accurate predictors of digital behavior than demographics.

▪ **Older groups also exhibit higher variation**

The range score for a 55-64 year old audience with 3 statements included is 45.53, which compares to just 13.98 for 16-24 groups.

Figure 8a: **DEMOGRAPHIC GROUP AVERAGES**

		MALE	FEMALE	16-24	25-34	35-44	45-54	55-64
<b>SINGLE DEMOGRAPHICS</b>		38.56	39.05	43.58	48.62	40.48	33.04	27.48
<b>DEMOGRAPHICS + ONE STATEMENT</b>								
	AVERAGE %	50.03	50.40	50.55	59.44	52.30	40.50	36.27
	AVERAGE INDEX	129.74	129.05	116.00	122.24	129.22	122.58	131.99
<b>DEMOGRAPHICS + TWO STATEMENTS</b>								
	AVERAGE %	59.61	60.23	58.23	67.17	63.13	46.97	47.41
	AVERAGE INDEX	154.57	154.23	134.09	138.15	155.98	142.14	172.55
<b>DEMOGRAPHICS + THREE STATEMENTS</b>								
	AVERAGE %	66.29	66.00	64.44	70.90	70.56	53.23	53.16
	AVERAGE INDEX	171.89	169.00	147.88	145.81	174.33	161.08	193.46

Figure 8b: **DEMOGRAPHIC GROUP RANGES**

		MALE	FEMALE	16-24	25-34	35-44	45-54	55-64
<b>SINGLE DEMOGRAPHICS</b>		38.56	39.05	43.58	48.62	40.48	33.04	27.48
<b>DEMOGRAPHICS + ONE STATEMENT</b>								
	MAX	58.70	59.76	55.08	66.26	59.92	49.21	49.26
	MIN	38.69	40.03	46.13	50.22	42.31	31.41	26.73
	RANGE	20.01	19.73	8.95	16.03	17.61	17.79	22.54
<b>DEMOGRAPHICS + TWO STATEMENTS</b>								
	MAX	67.41	72.27	65.11	72.52	77.86	59.61	62.54
	MIN	49.91	51.91	51.20	59.50	54.95	28.17	35.49
	RANGE	17.49	20.35	13.91	13.02	22.92	21.45	27.05
<b>DEMOGRAPHICS + THREE STATEMENTS</b>								
	MAX	72.45	75.36	70.96	75.79	79.27	74.32	83.80
	MIN	57.65	56.24	56.99	62.08	60.25	42.25	38.27
	RANGE	14.81	19.12	13.98	13.71	19.02	32.08	45.53

# Quantifying impact on Mobile and Tablet

The same analysis was performed for mobile and tablet behaviors, providing a benchmark of the impact of attitude on predicting cross device behaviors.

Figure 5 below provides a summary of the average score for the various groupings by device. In addition, the index score highlights the difference between the groups aggregate behavior score and the demographic average.

Figure 9: AVERAGE DEMOGRAPHIC GROUP SCORES BY DEVICE

		MALE	FEMALE	16-24	25-34	35-44	45-54	55-64
PC	SINGLE DEMOGRAPHICS	38.56	39.05	43.58	48.62	40.48	33.04	27.48
	DEMOGRAPHICS + ONE STATEMENT	50.03	50.40	50.55	59.44	52.30	40.50	36.27
	DEMOGRAPHICS + TWO STATEMENTS	59.61	60.23	58.43	67.17	63.13	46.97	47.41
	DEMOGRAPHICS + THREE STATEMENTS	66.29	66.00	64.44	70.90	70.56	53.23	53.16
MOBILE	SINGLE DEMOGRAPHICS	36.44	34.73	37.92	42.41	35.64	28.14	23.15
	DEMOGRAPHICS + ONE STATEMENT	47.34	46.97	46.36	54.35	46.91	28.10	31.03
	DEMOGRAPHICS + TWO STATEMENTS	56.64	58.90	56.99	62.83	58.34	48.02	44.20
	DEMOGRAPHICS + THREE STATEMENTS	62.37	66.39	65.76	66.19	65.93	56.50	54.76
TABLET	SINGLE DEMOGRAPHICS	36.18	32.26	34.91	41.14	36.02	26.15	21.91
	DEMOGRAPHICS + ONE STATEMENT	47.98	46.59	45.35	54.01	47.47	40.40	29.23
	DEMOGRAPHICS + TWO STATEMENTS	58.64	58.70	56.03	63.02	59.36	56.63	40.56
	DEMOGRAPHICS + THREE STATEMENTS	66.33	65.38	65.83	66.86	67.83	66.23	50.51
PC	SINGLE DEMOGRAPHICS	100	100	100	100	100	100	100
	DEMOGRAPHICS + ONE STATEMENT	130	129	116	122	129	123	132
	DEMOGRAPHICS + TWO STATEMENTS	155	154	134	138	156	142	173
	DEMOGRAPHICS + THREE STATEMENTS	172	169	148	146	174	161	193
MOBILE	SINGLE DEMOGRAPHICS	100	100	100	100	100	100	100
	DEMOGRAPHICS + ONE STATEMENT	130	135	122	128	132	135	134
	DEMOGRAPHICS + TWO STATEMENTS	155	170	150	148	164	171	191
	DEMOGRAPHICS + THREE STATEMENTS	171	191	173	156	185	201	237
TABLET	SINGLE DEMOGRAPHICS	100	100	100	100	100	100	100
	DEMOGRAPHICS + ONE STATEMENT	133	144	130	131	132	154	133
	DEMOGRAPHICS + TWO STATEMENTS	162	182	160	153	165	217	185
	DEMOGRAPHICS + THREE STATEMENTS	183	203	189	163	188	253	231

This analysis presents clear findings about the impact of attitudes on behavior:

▪ **Mobile and tablet broadly mirror PC:**

- Increased attitudinal definition drives higher digital engagement scores across tablet and mobile as well as PC, but the starting point is lower for tablet and mobile (i.e. behavior scores are lower than for PC).
- Age and gender groupings follow the engagement pattern and variances laid out in the PC analysis.
- Correctly defined attitudinal groups aged 55+ can be more digitally engaged on mobile and tablet than certain 16-24 year olds.

▪ **The integration of an attitude has more impact on mobile and tablet behavior than PC**

If we look at the 25-34 year old grouping, we can see that the "Demographic + 3 Attitudinal Statements" audiences score an average of 64.44% for PC and is 48% higher (Index 148) than the single demographic, which scores 48.6%. For mobile, the differential is larger (Index 173) and for tablet it is larger still (Index 189). This is reflected in all groupings.

# 4

## CONCLUSION

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The analysis conclusively establishes that, regardless of the nature of the statements integrated, attitudes drive behavior.

This has major impacts for how agencies and brands approach digital strategy and planning:

- Planning that focuses on demographics like age, location and gender will fail to generate accurate, relevant or effective strategies.
- Limited audience data provided by passive analytics or measurement tools cannot drive accurate enough insights for strategy development. Basic demographics undersell and misrepresent the key behaviors that audiences exhibit.
- Market research and self-perceptions are at the heart of knowing the consumer, enabling big ideas and engagement plans that resonate with the right audience, at the right time, in the right place.



KNOW YOUR AUDIENCE

# 5

## ABOUT GLOBALWEBINDEX

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### Products



PRO Platform™

Custom audience creation  
and unlimited data pulls.



Insight Store™

Over 130,000 data packs,  
reports, infographics and  
snapshots.



Stream Intelligence™

Insight on demand from our  
team of expert analysts.



GW.IQ™

Web analytics for deeper  
audience profiling.

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