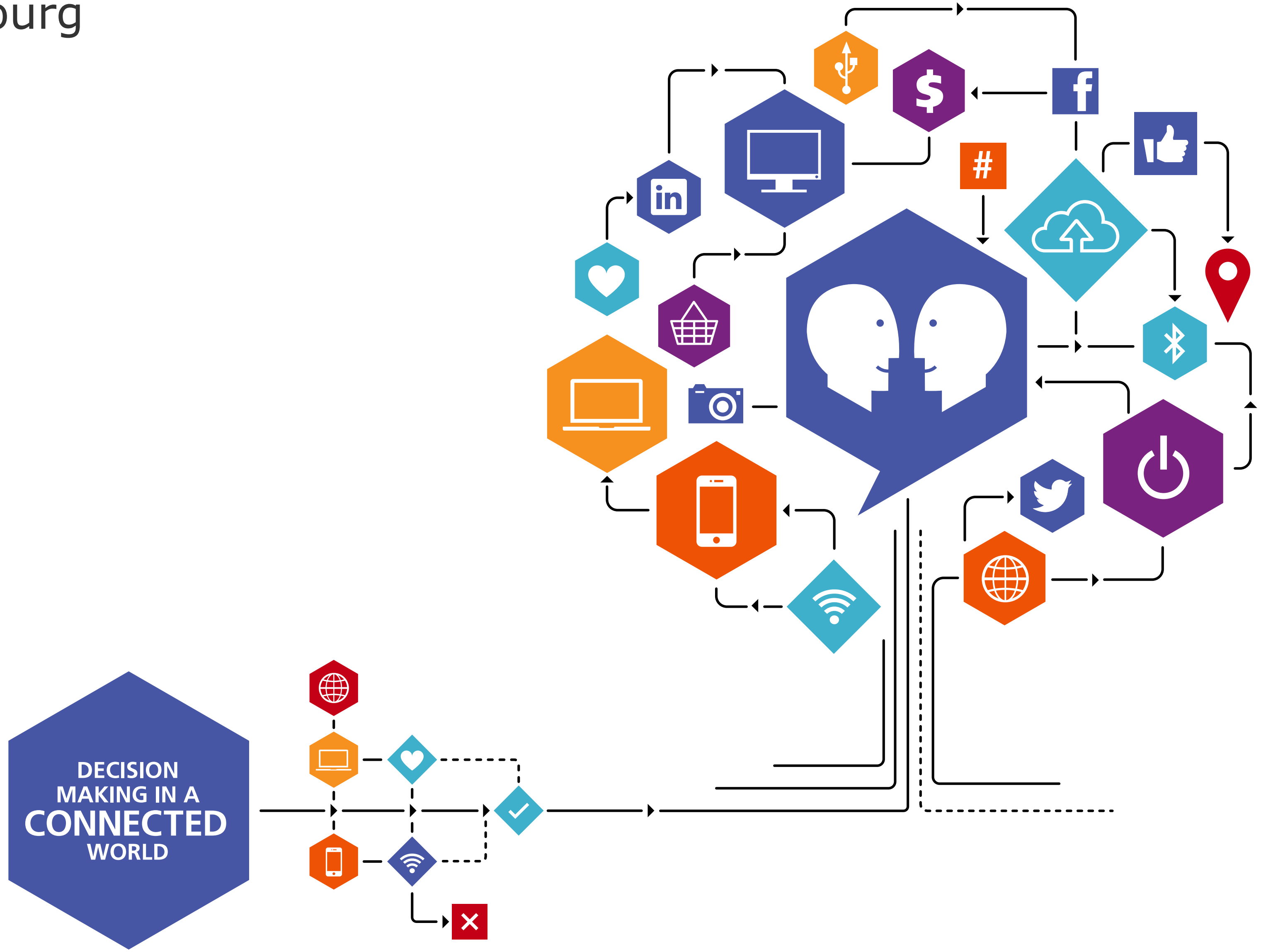
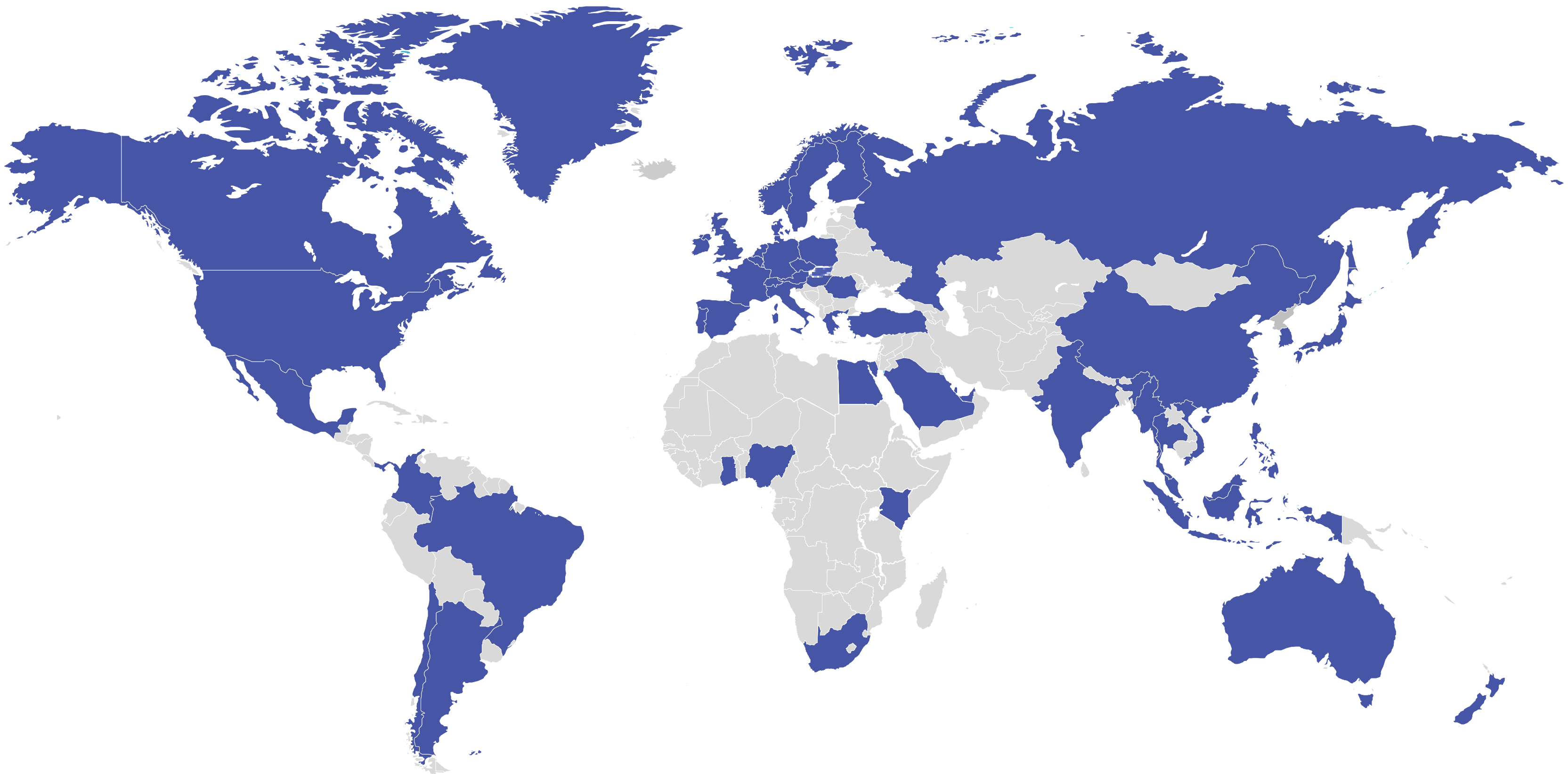
Connected Life 2014
Luxembourg



Connected Life 2014 explores how technology is transforming the lives of consumers across the planet

Covering regular internet users in over 50 markets around the world, this report offers essential insight into the impact of the growing digital ecosystem on the media landscape

It uncovers new and exciting opportunities for marketers to connect with their consumers in this increasingly complex environment



Media fragmentation is often described as the biggest brand **challenge** of the digital age. In reality, it's the greatest **opportunity.**

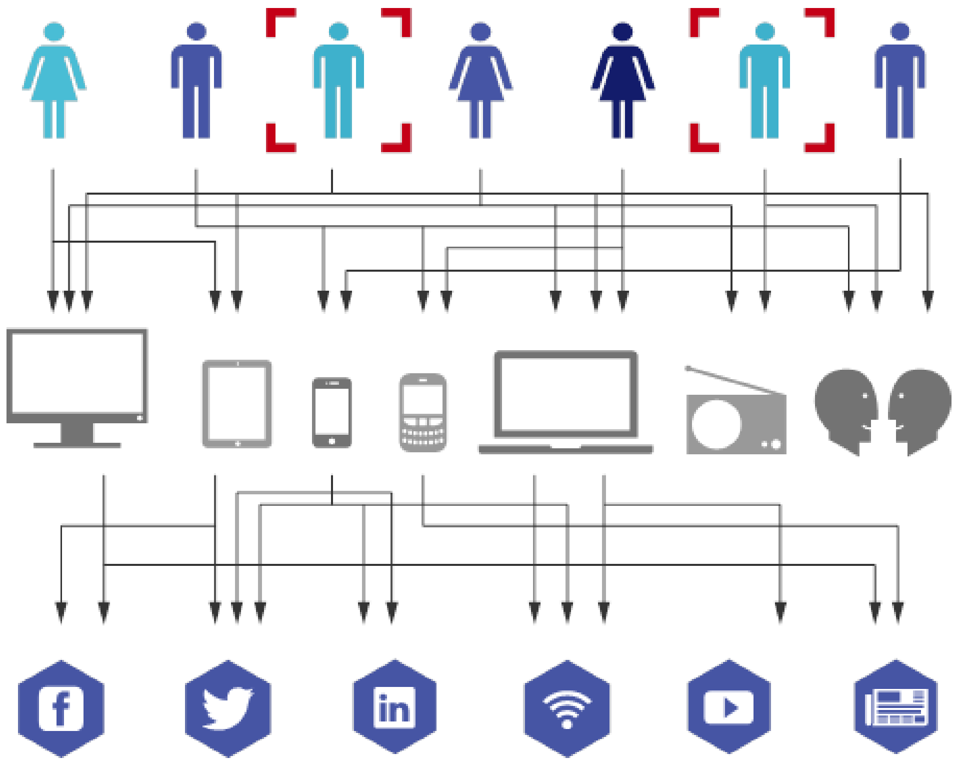
Connect with your consumers on a whole new level

As consumers move across multiple channels and adopt more advanced devices, targeting becomes a more complex task.

Yet there is a pattern to this behaviour; consumers are selecting the device, channel or touch-point that's right for them and the moment they are in.

Understanding these patterns allows the targeting of individuals and groups far more precisely and ultimately delivers against both long and short term marketing objectives with greater accuracy.

Connected Life delivers better decision making in a connected world.



Connect with the latest insights

How has the digital ecosystem developed?
What opportunities to meet specific brand objectives exist as a result?

1.
How has the growing digital ecosystem impacted media habits?

Role of digital in the overall
Media Landscape

Research Questions

- What does the device infrastructure look like either locally or globally?
- What is the interaction between devices and media?
- What does a day in the life of a digital consumer look like across the world?
- What are the different types of digital segments that exist across markets?

2.
What is the reach of digital platforms and channels?

Role of digital in increasing
Brand awareness

- What do consumers use these devices for? What content or services do they access, why?
- What is the incremental reach of different digital channels?
- What are the key market trends? Where is the market going and how quickly is the market changing?
- How does this compare across segments?

3.
How and why do consumers engage with brands?

Role of digital in
Brand building

- How do digital consumer behaviours, attitudes, needs and motivations change across categories?
- What channels or routes of engagement are used?
- What content needs exist across categories?
- How does this compare across targets, categories and markets?

4.
How digital is the Path to Purchase?

Role of digital in driving
Brand activation

- To what extent is online research and purchase prevalent in my category?
- What are the barriers and drivers of eCommerce?
- What's the share of voice for digital and social channels throughout the P2P?
- How do these paths change across segments?

Contents

Connected Life – 8 Key insights

The digital ecosystem

- Luxembourg is **a multi-device, mobile-centric market**
- Despite being a **digitally-advanced market**, Luxembourgers are **still very reliant on traditional media formats**

Channel and platform reach

- **Multi-screening** is a common occurrence and consumers **attention is highly fragmented**
- Luxembourg is a **fast follower** in the uptake of new digital activities

Connected Life - 8 Key insights

Consumer brand engagement

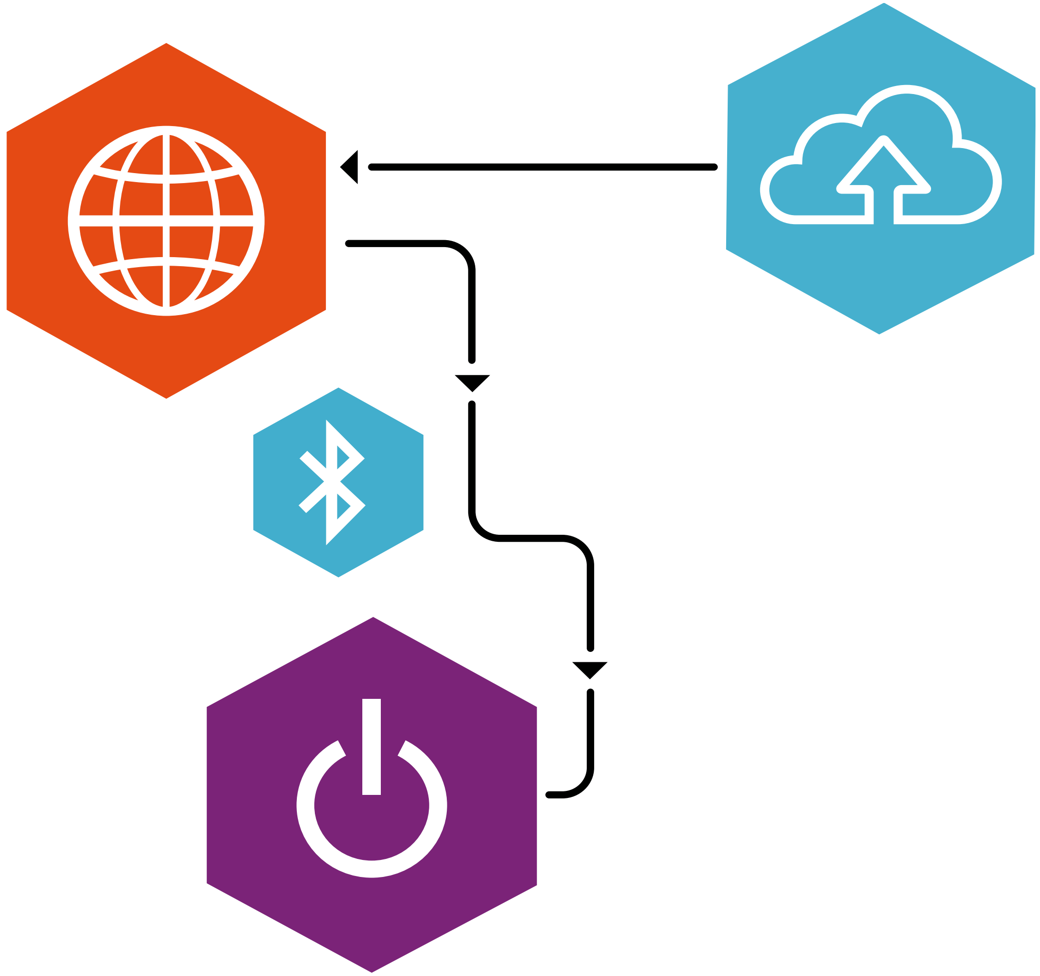
- Internet users in Luxembourg are **less willing to engage with brands**, but those who do so, **seek for functional benefits**
- Those who are open to brands are far more willing to **broadcast brand content** and **engage with brands on social networks**

Connect on the path ot purchase

- Luxembourg **lags compared to the rest of the world in their level of pre-purchase research**, but **leads in terms of online purchase**
- Their are **barriers concerning delivery cost, payment security and product quality** that need to be addressed in order to **further drive eCommerce development**

It's throught a precise understanding of **behaviour patterns** that companies can **transform the challenge of media "fragmentation"** into a **great opportunity** and **increase their relevance and engagement** versus the consumers !

2
Connecting with consumers



The two most important questions to ask when forming connection strategy

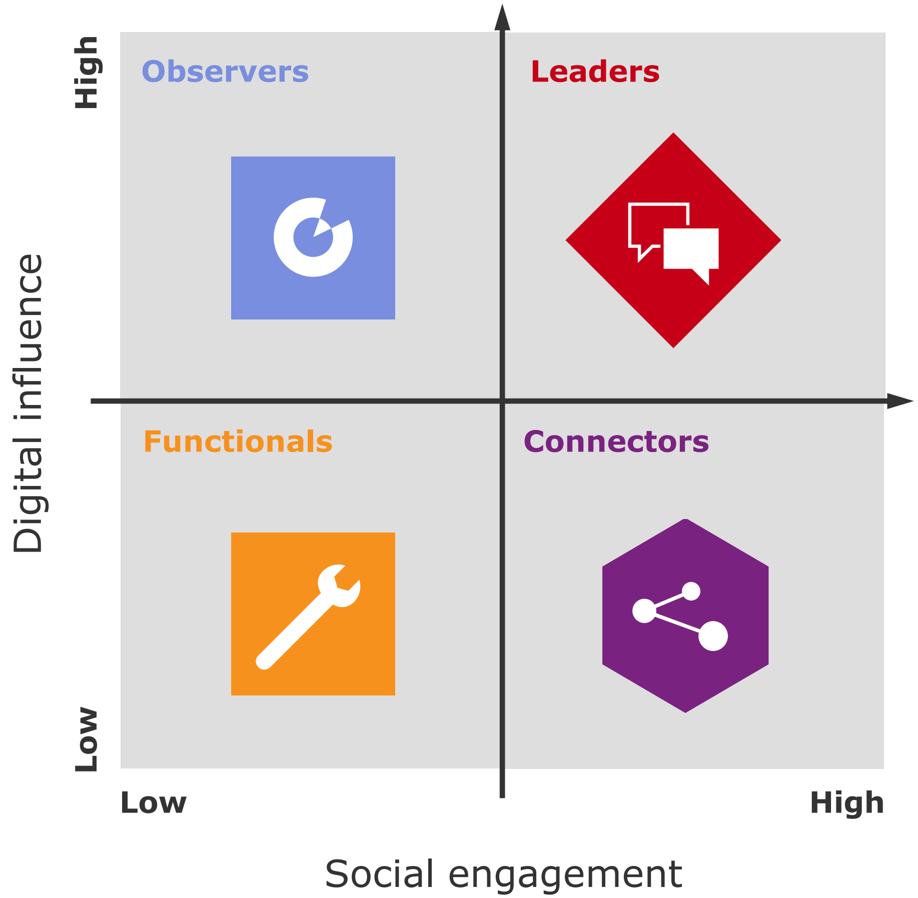
To what extent should I focus on digital, rather than other channels?

The answer to this question is based on the level of influence digital channels hold, which grows with improving *access*. The more devices or bandwidth a consumer has, the more time they will spend online and the more influential the medium becomes

Where should this focus be? On social and earned media or owned and paid?

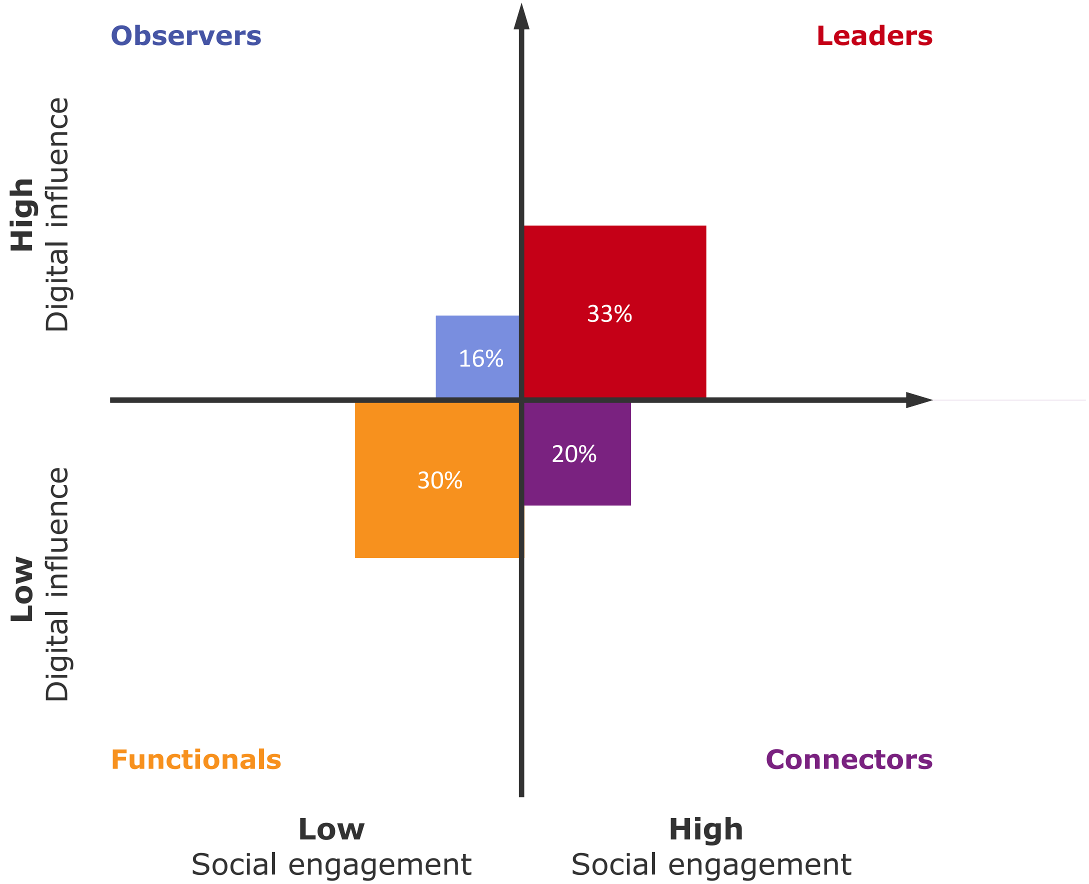
The answer to this questions is less clear cut as it is more closely linked to *attitudes* than access, wherever consumers have a stronger attachment to social channels they will play a more important role.

We use a simple framework to describe this shifting dynamic across markets, categories and consumers



Yet, in Luxembourg, internet users, relative to each other are more likely to be Leaders or Functionals

Axis drawn at *local* level, to compare within market:

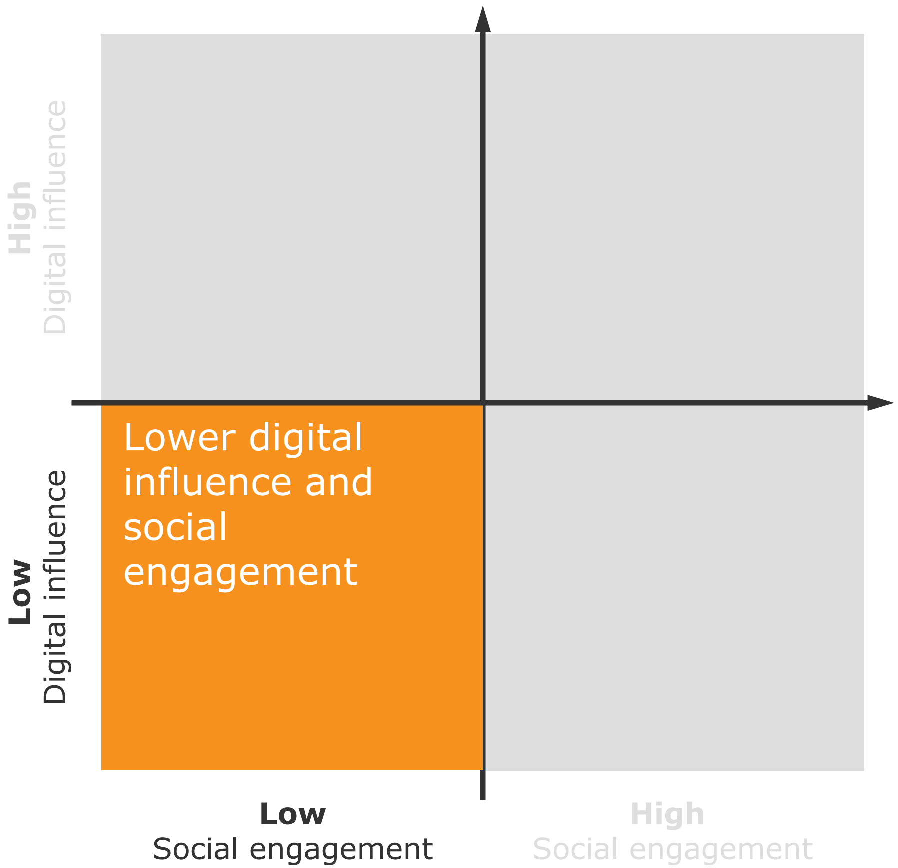


Connected Life Segmentation
Base: Global (54,775) | Luxembourg (975)

Low digital influence, low social engagement – **Functionals**

With either poor access (emerging markets) or little interest in digital technology (developed markets), this group is still influenced far more by the world outside than the internet, particularly offline media

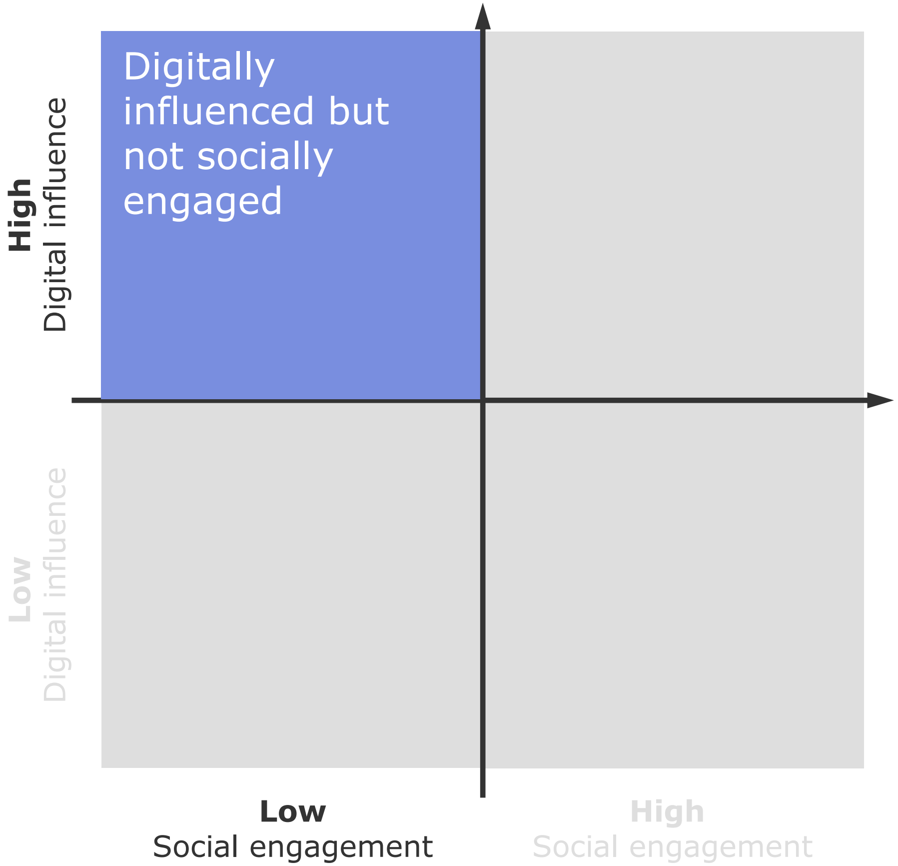
- Less engaged in Digital Media and Technology than others
- Less engaged in Social Media than others
- Still consuming large amounts of traditional media
- Digital not as prevalent in the decision path



High digital influence, low social engagement – **Observers**

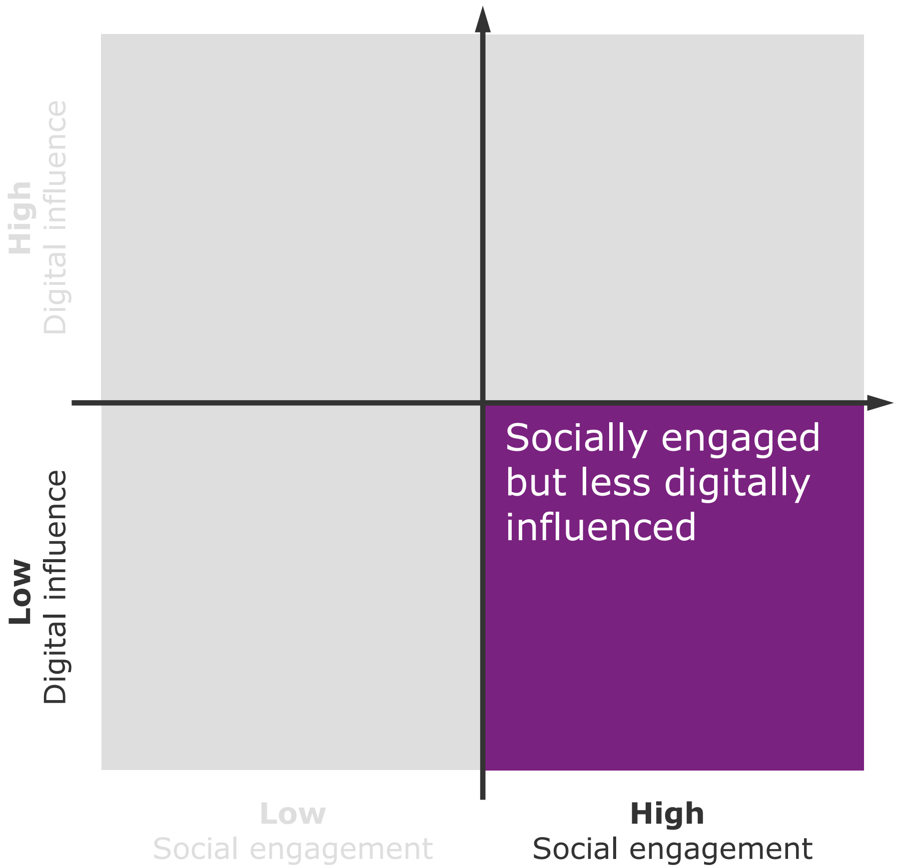
The internet is a huge source of information for this group, but they show little interest in engaging, with or being influenced by, social media

- Heavily engaged in digital media & technology
- Social media is not as important to them as other groups
- Use digital through the day, across multiple devices in many markets



Low digital influence, high social engagement – **Connectors**

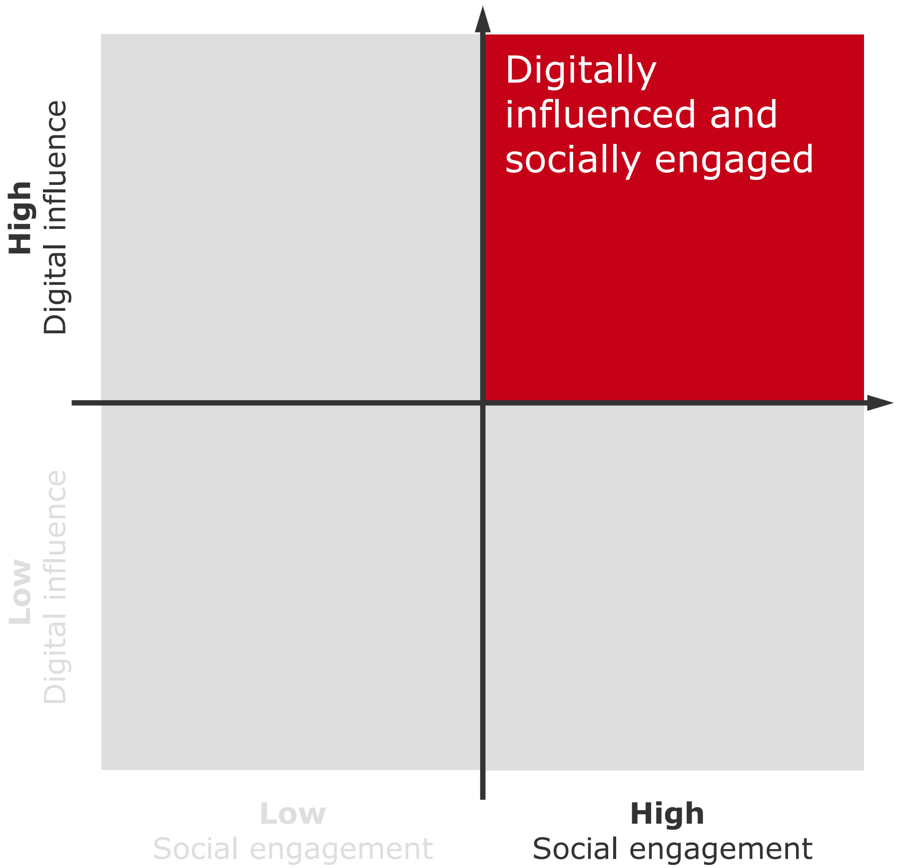
Often new to the internet and keen to do more, this group may have to prioritise how they spend their limited online time, and choose social every time



- Highly engaged in social – an important part of their life
- A consumer of social (rather than an influencer)
- Not a heavy user of digital outside of social, compared to others

High digital influence, high social engagement – **Leaders**

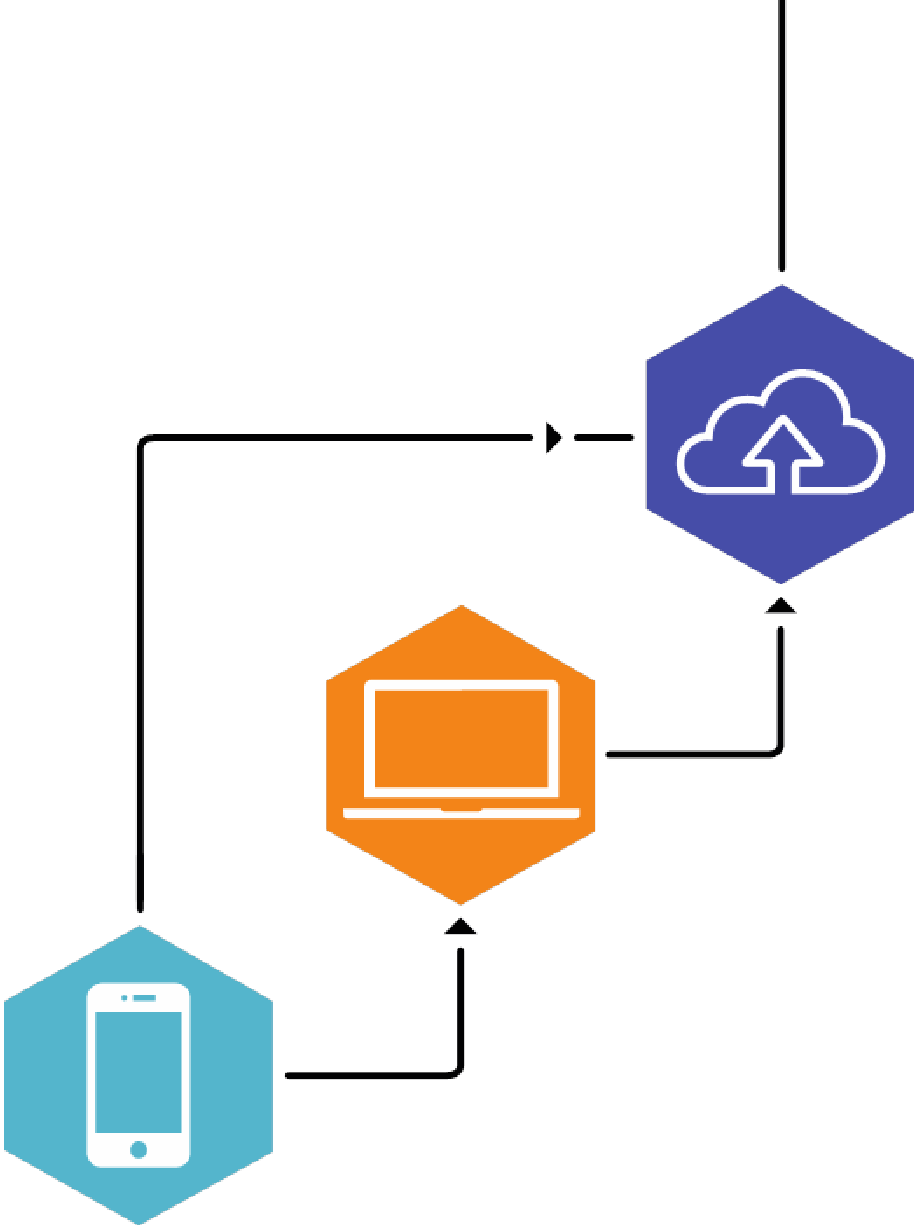
Quick to adopt new technologies and see digital as an end in itself, this group are both heavily influenced by, and heavily influential, on digital and social channels



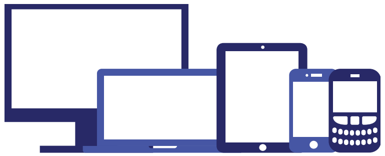
- Highly engaged with both digital & social media
- Typically more vocal in social media
- Constantly connected through the day, across multiple devices in many markets
- Harder to reach via traditional means
- Greatest influence of digital & social in the decision path

3

How has the growing digital ecosystem impacted media habits?

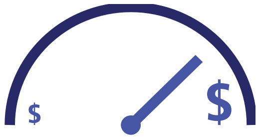


Access and attitude define a market's level of digital sophistication



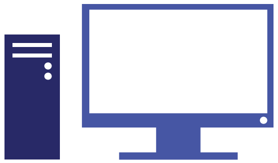
Device infrastructure

Including fixed line or wireless internet penetration, whilst access to mobile and other devices can extend penetration or offer the only gateway to digital content and services



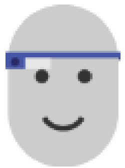
Cost and speed of data

Cost of data is still a restrictive influence in many emerging markets whilst speed of access may create a barrier in developed markets



Device legacy

Users with long histories of PC, or traditional media use often find these habits hard to break, and migrate to new devices or new services at a slower rate. This leads to both 'digital natives' and 'leapfrogging' as users without these legacies adopt faster



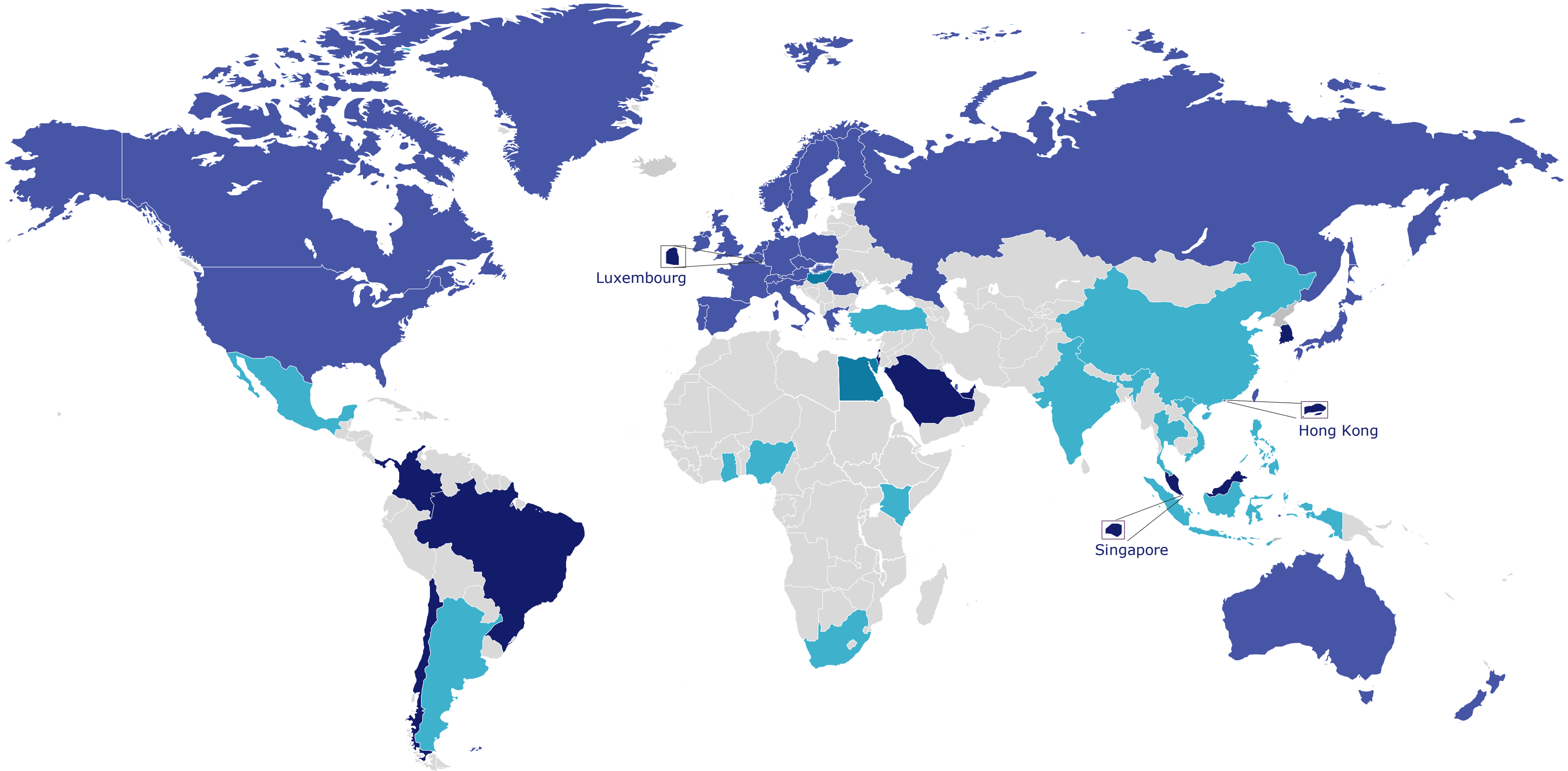
Digital engagement

As access restrictions lift, digital engagement becomes the defining factor in speed of adoption of new digital behaviours or services. Those with a real interest in new technologies, or with few alternatives will migrate online at a far faster rate

Access factors → Attitudinal factors

Owning multiple devices and being attitudinally engaged makes Luxembourg a multi-device, mobile-centric market

Device centricity



Markets not covered

Single-device, mobile -centric
Markets that own relatively fewer devices and are reliant on mobile

Single-device, PC-centric
Markets that own relatively fewer devices, have a legacy using PCs and rely on them for most activities

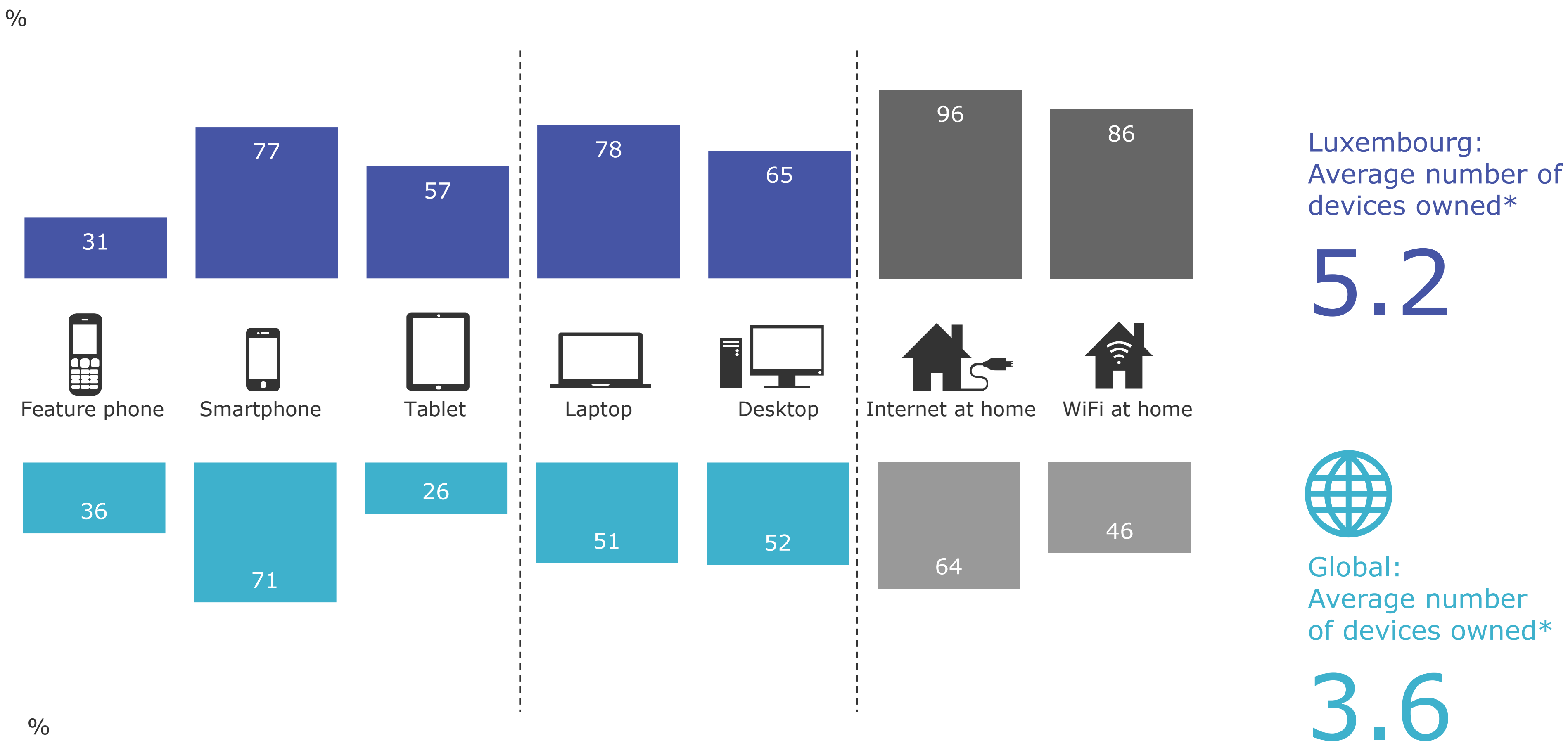
Multi-device, PC-centric
Markets that own many devices, but have a legacy using PCs and so focus most time on them

Multi-device, mobile-centric
Markets that own many devices, are quick to adopt the latest devices and spend most time on mobile

Connected Life 2014
Base: Global (54,775) | Luxembourg (975)

On average, internet users in Luxembourg own over five devices. Tablet ownership in Luxembourg is more than twice of the global average

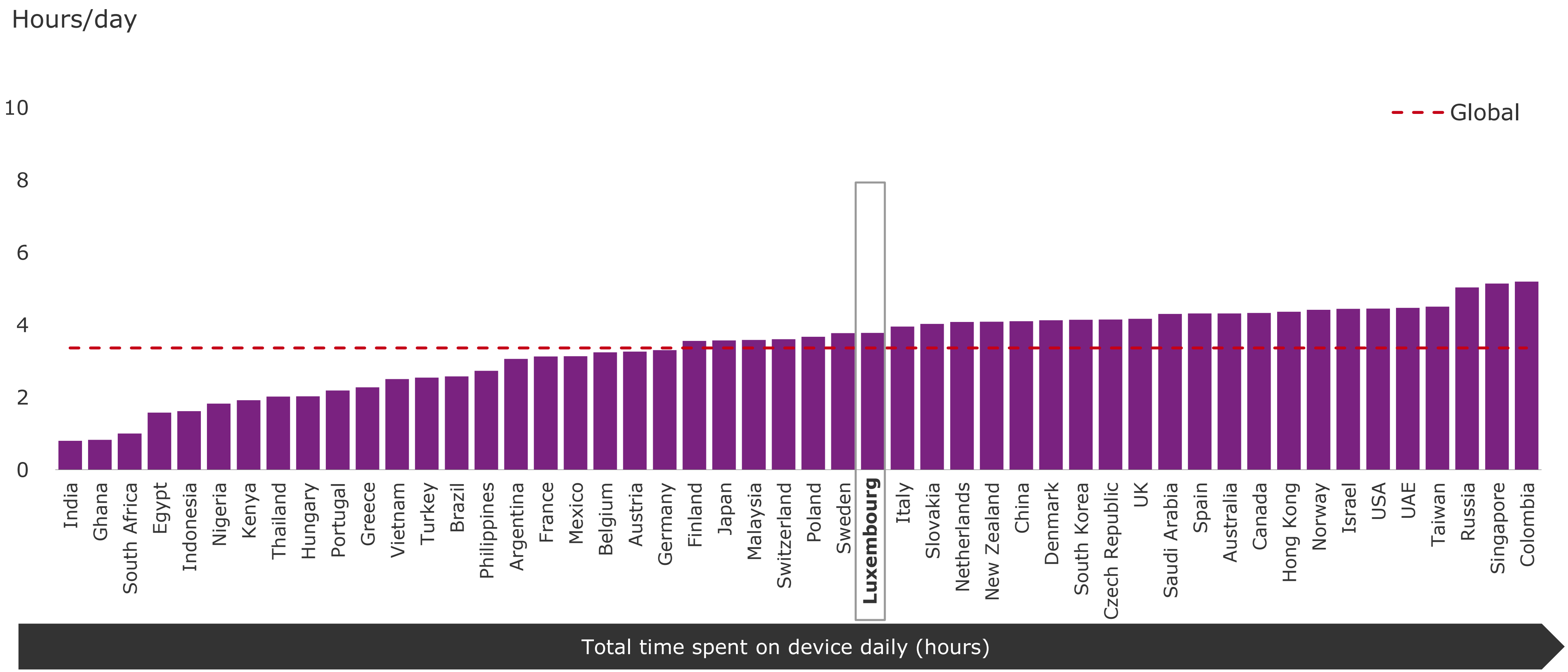
Device ownership



B1. Device ownership
Base: Global (54,775) | Luxembourg (975)
*Devices owned include: mobile phone, smartphone, tablet, laptop, desktop, gaming console, smart TV, flat panel TV and fixed line telephone

Luxembourgers spend more time on devices compared to the global average

Total time spent on device daily (hours) – market level

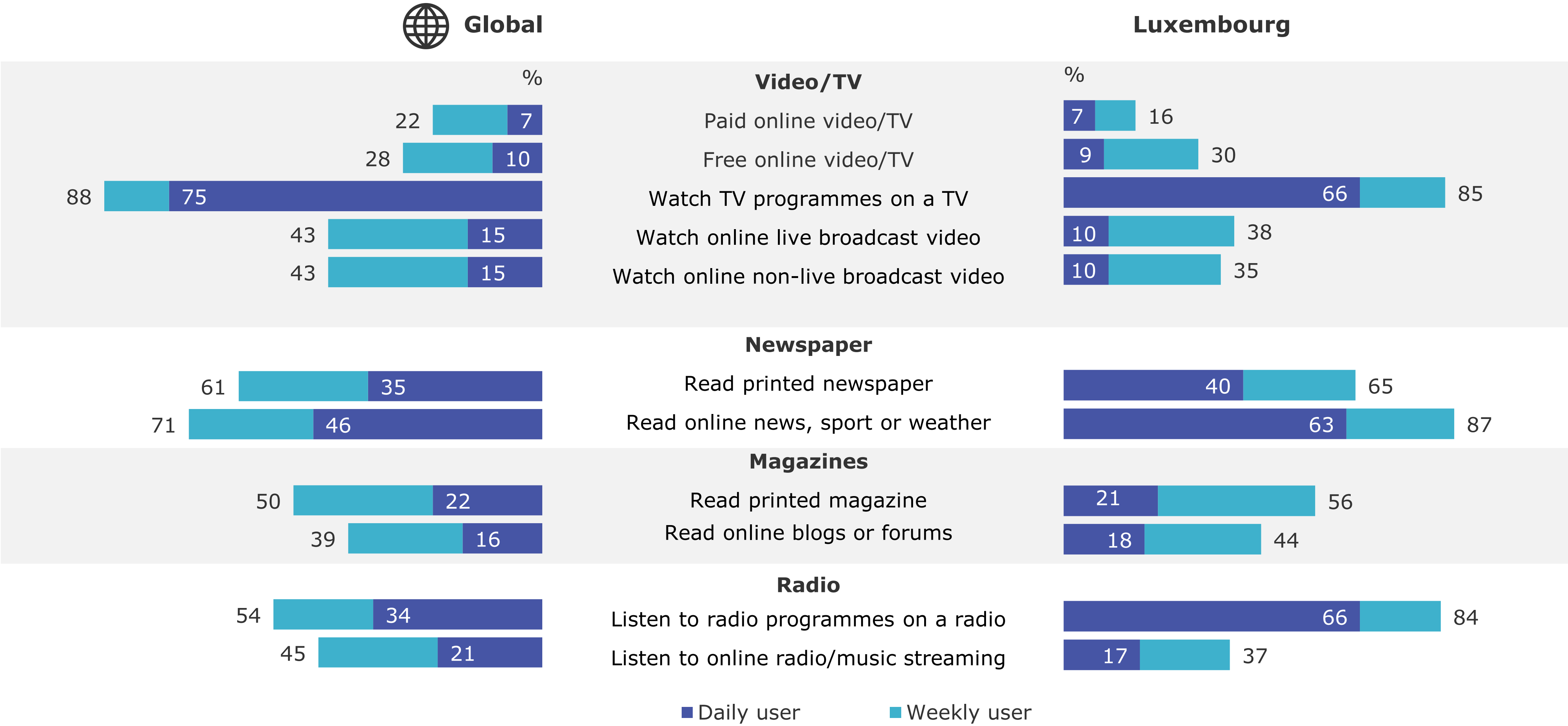


D2. Time spent on device | Google CCS Program 2014
Base: Global- typical day (36,797)

N.B. internet penetration factored in to take into account overall incidence

Traditional media formats are still dominant in Luxembourg, with the exception of news which has shifted online

Overall media consumption

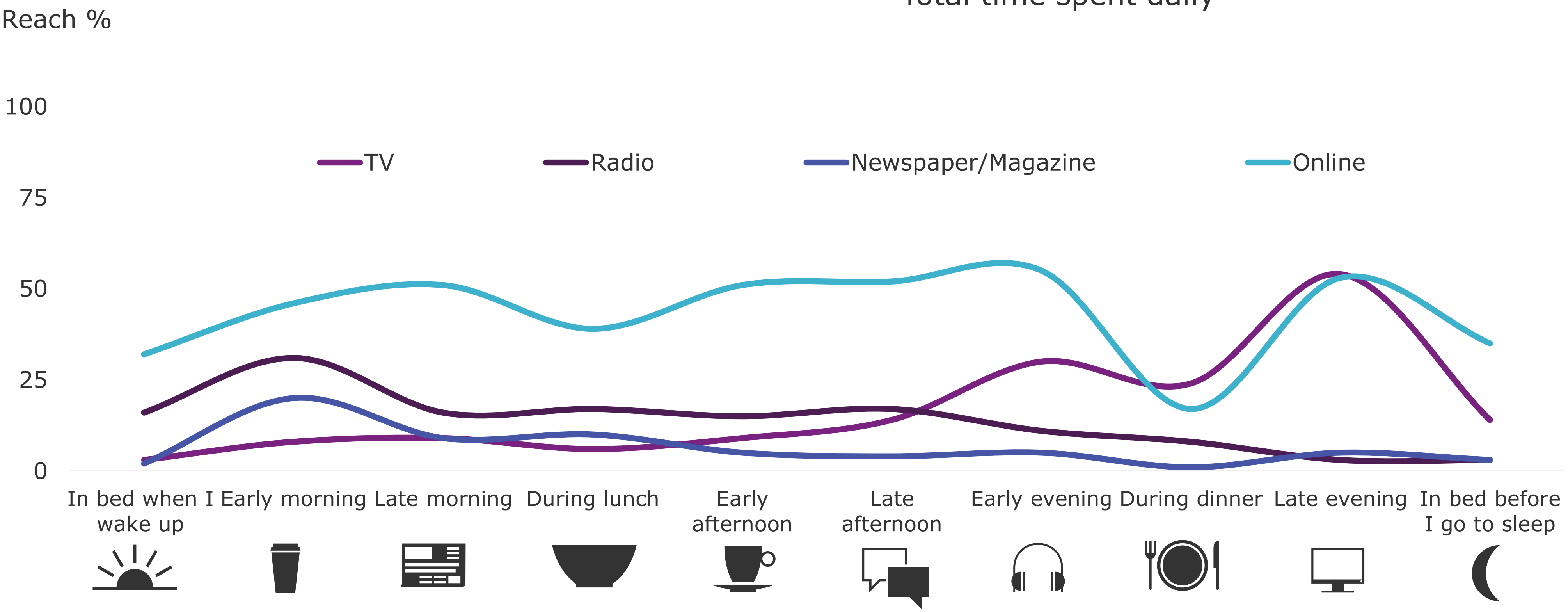


A1. Frequency of media consumption| C1. Frequency of digital activities
Base: Global (54,775) | Luxembourg (975)

Online media consumption is strong throughout the day, apart from the evening period where TV viewing peaks

How traditional and online media are used throughout the day

Total time spent daily

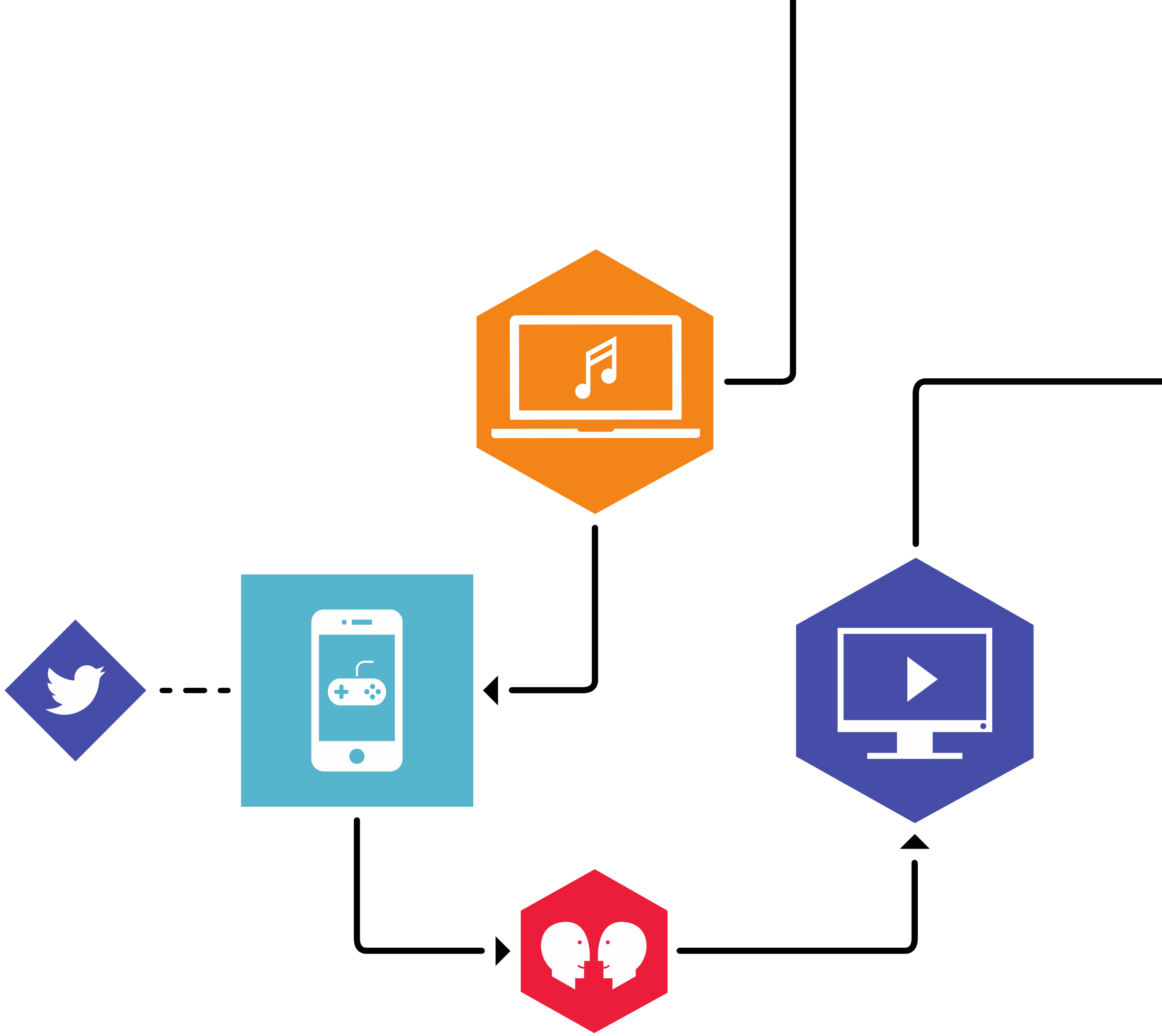


D2. Total time spent on device/media | D2a. Total time spent online | D3. Device/media usage by daypart
Base: Luxembourg - typical day (705)

TNS

4

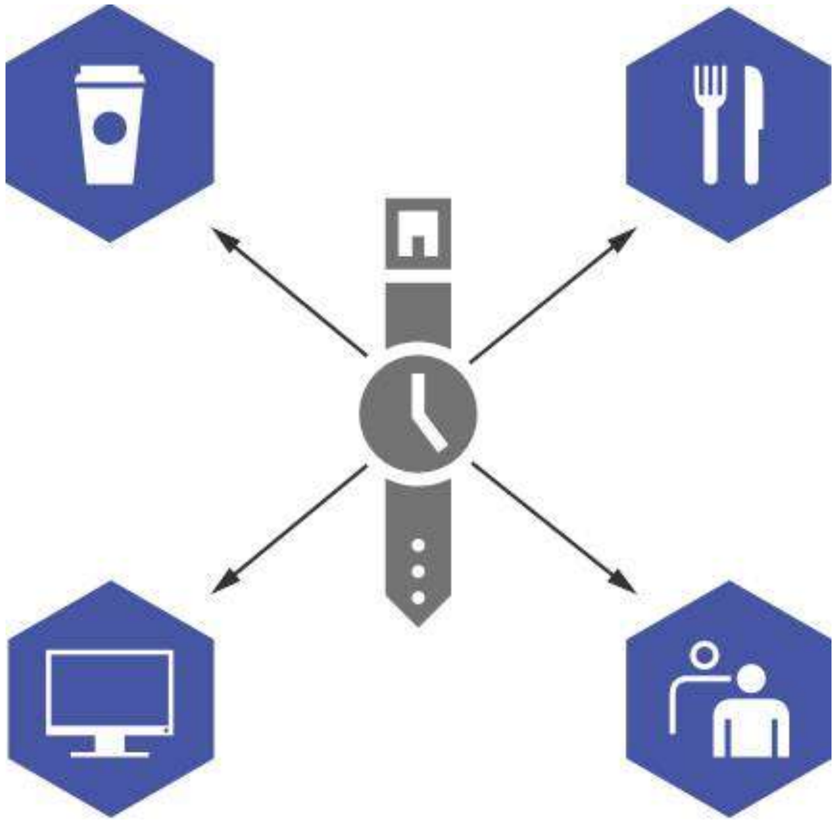
What is the reach of digital platforms and channels?



Connect with moments, not just target groups

Marketing used to be simpler. Marketing goals were about exposing your message to as many people as possible within your target group

A fragmented landscape demands a shift in focus. The question is no longer 'how can I reach my consumer?' but 'how can I reach my consumer at a time when my brand is most relevant to them?' Thereby increasing the relevancy of a message by targeting consumers in a specific context, with a specific need.

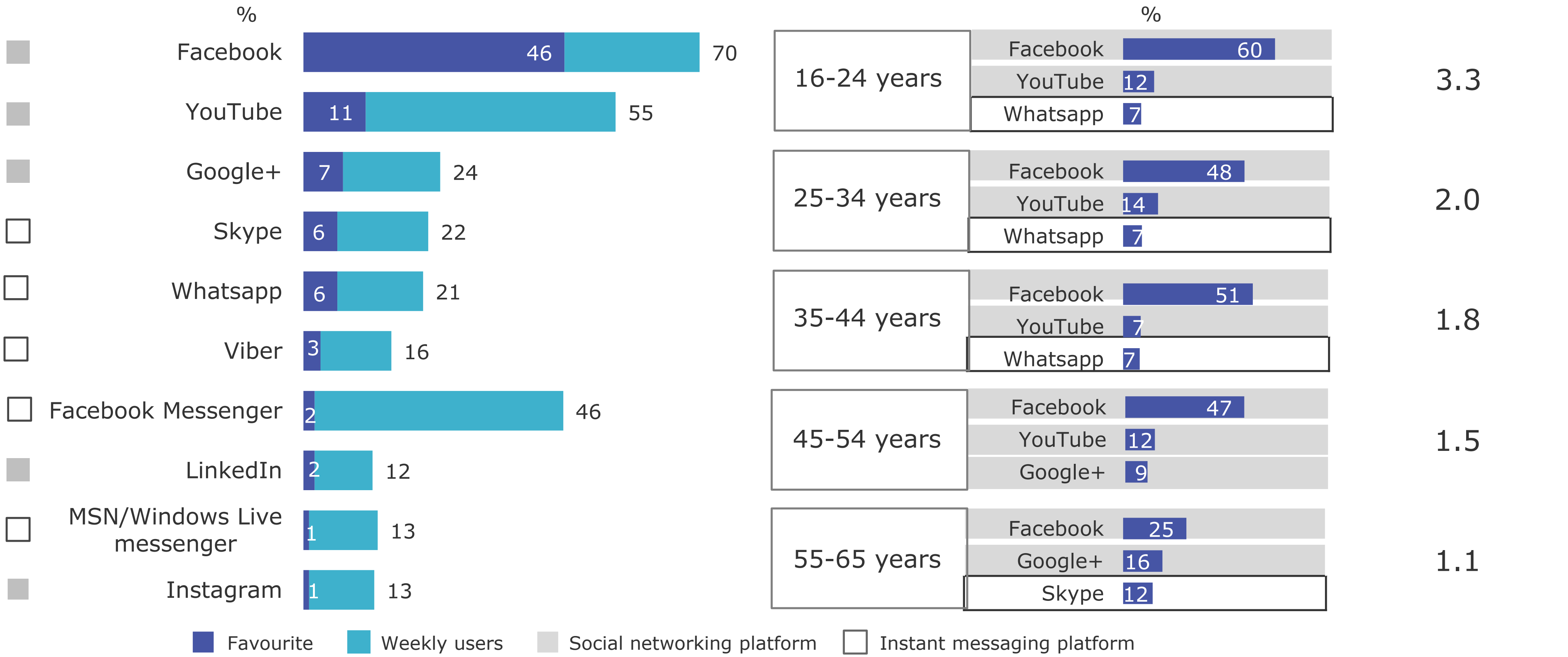


Younger users access a wider repertoire of social platforms, while older users tend access one daily. Facebook dominates are most popular platform across age groups, although younger users also show affinity for YouTube

Top social networking and instant messaging platforms

Favourite platform (by age)

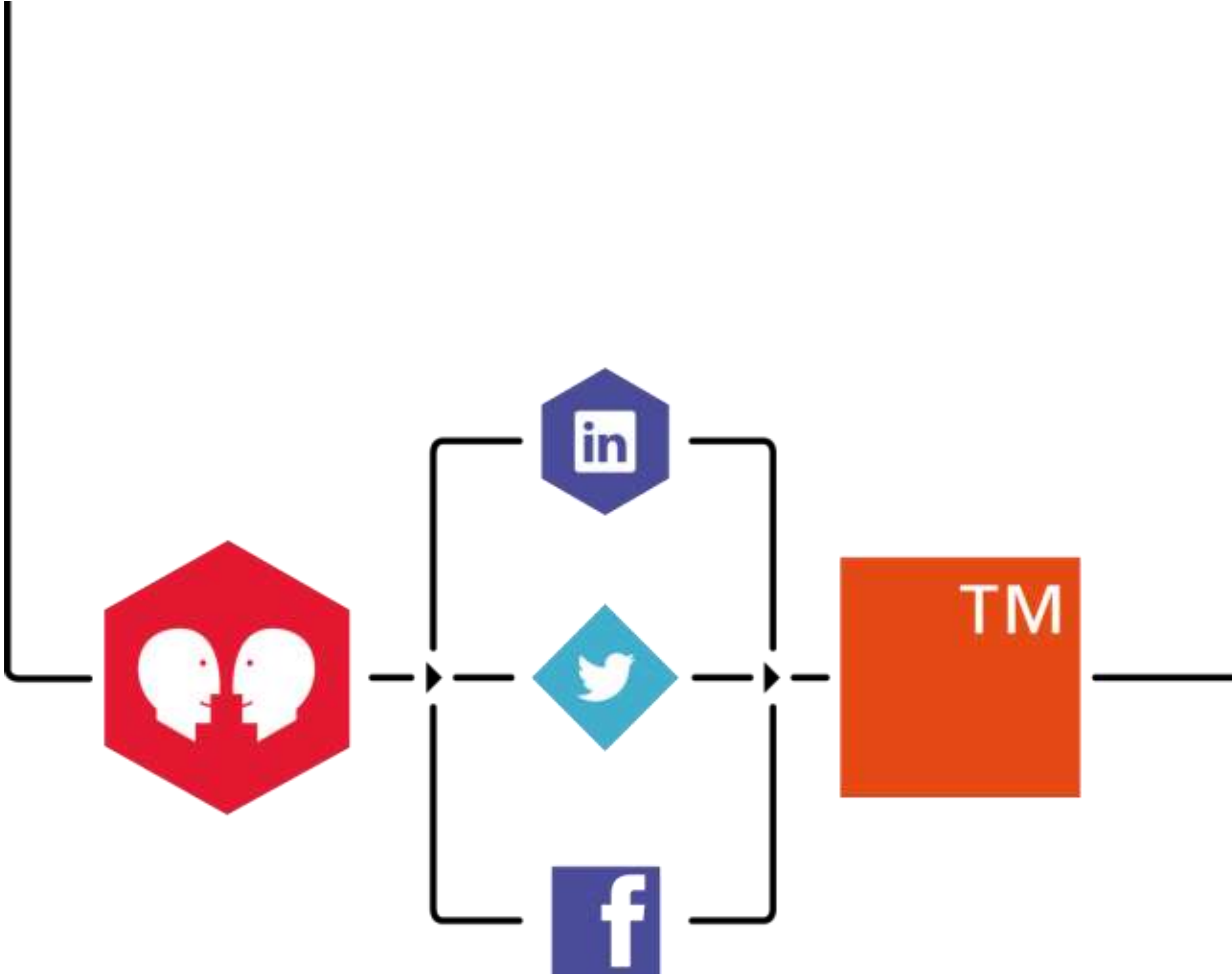
Avg. number of platforms used daily



C4. Frequency of social networking and IM usage | C4a. Favourite social networking or IM platform
Base: Luxembourg (975)| 16-24 years (137) | 25-34 years (192) | 35-44 years (228) | 45-54 years (245) | 55-65 years (173)

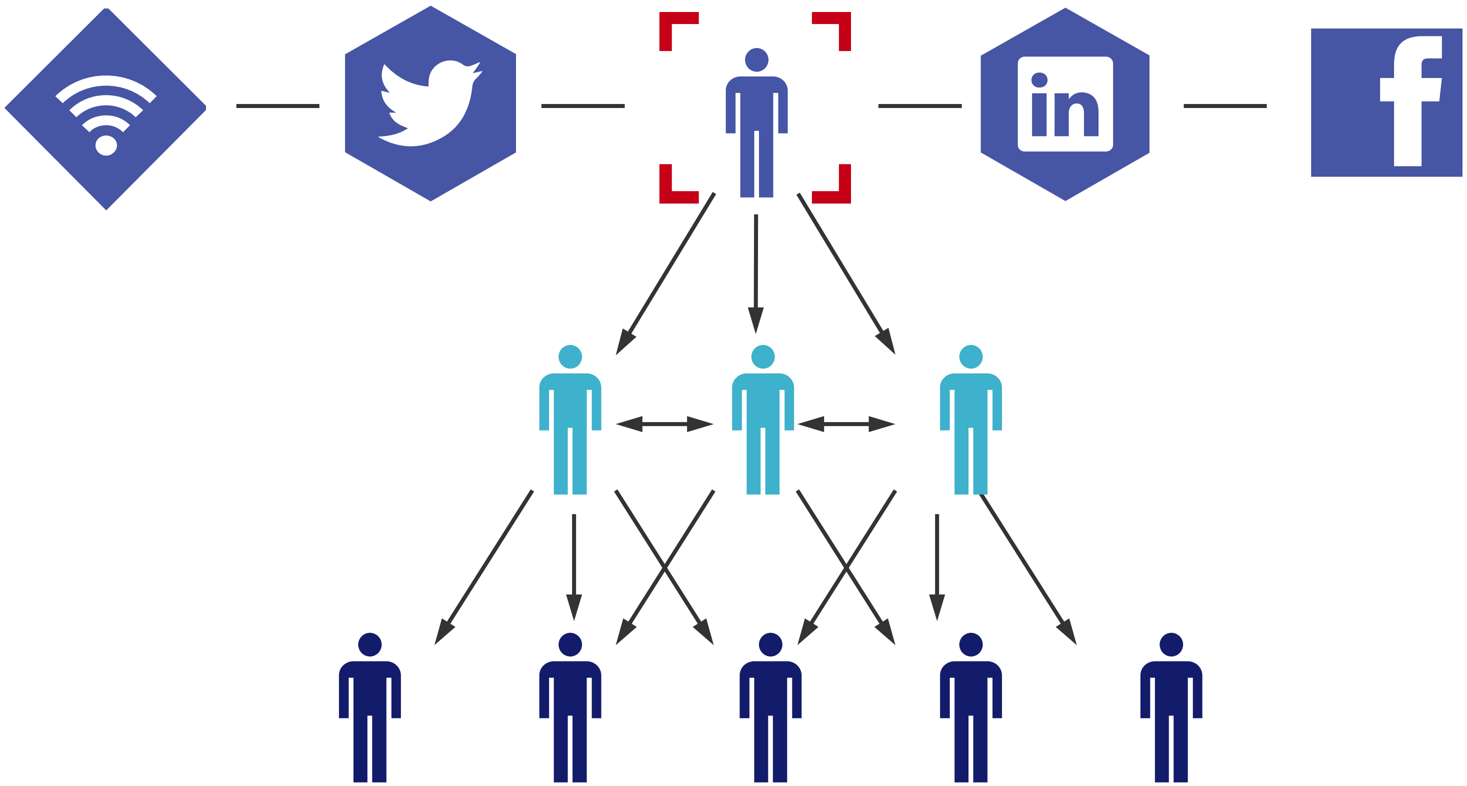
5

How and why consumers connect with brands



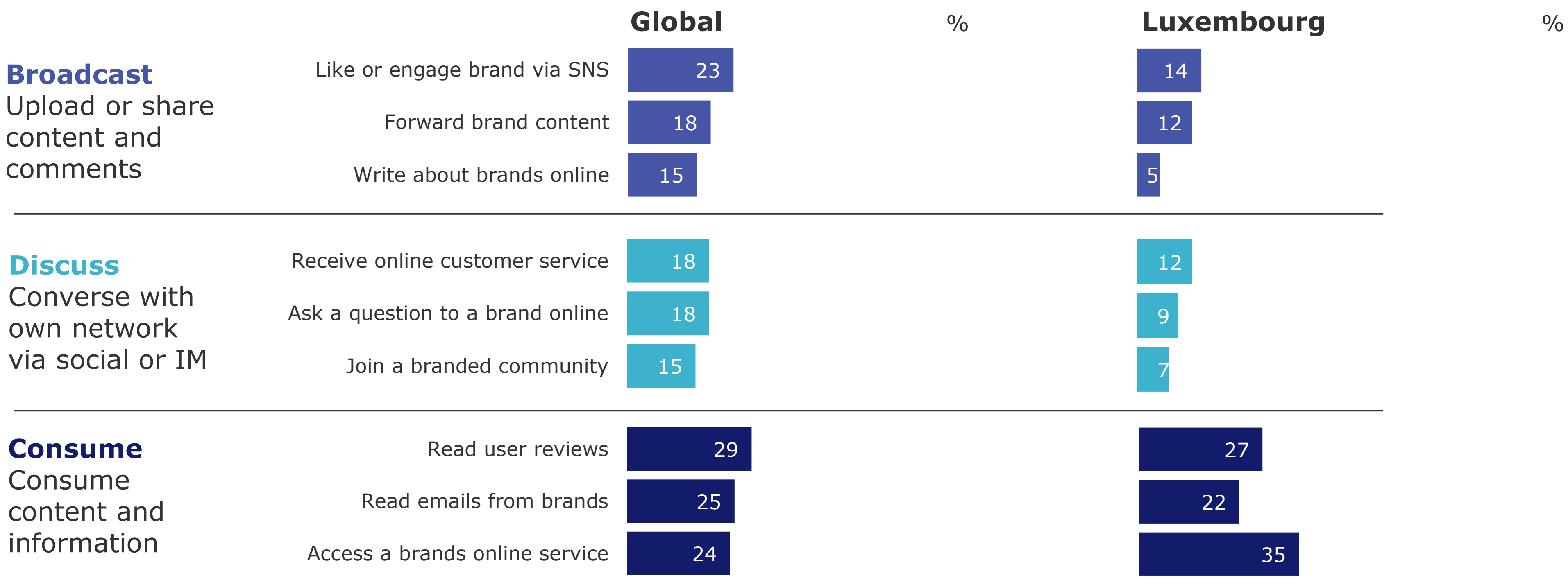
Great content marketing is timely, relevant and shareable

In this scenario, not all consumers are equal, and prioritising those that are most active and most open to brand contact will increase the chances of success.



Consumers in Luxembourg are far less open to brands on social networks compared to those globally, but they are more likely to access a brand's online service

Reach of brand activities - Global vs. Luxembourg



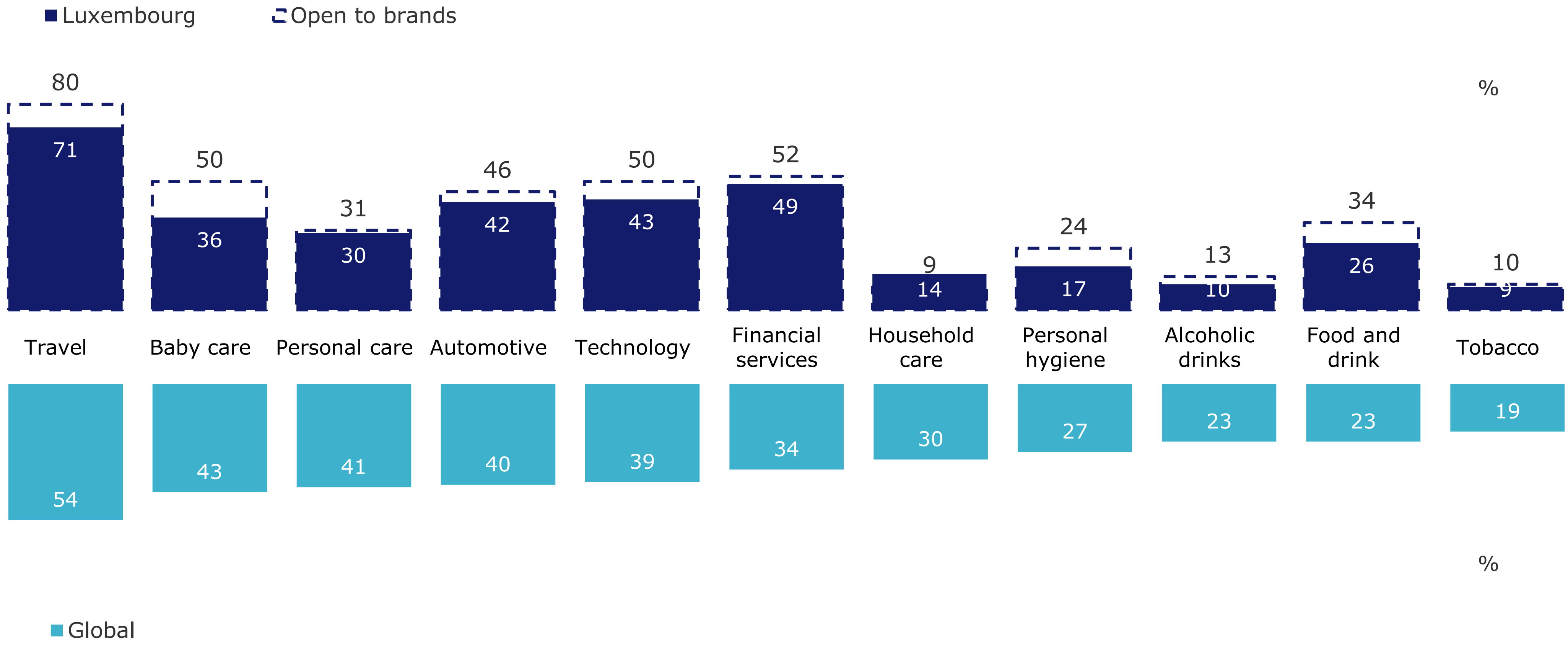
	Global	Luxembourg
% that like to engage with brands on social	40%	18%

N.B. Reach of activities refers to weekly usage for top activity for each type

C5. Brand engagement activities | C8b. Brand attitude – I like to engage with brands on social
Base: Global (54,775) | Luxembourg (975)

Consumers are most willing to engage with Travel, Financial services, Technology and Automotive brands, but those who are open to brands are more willing to connect across categories

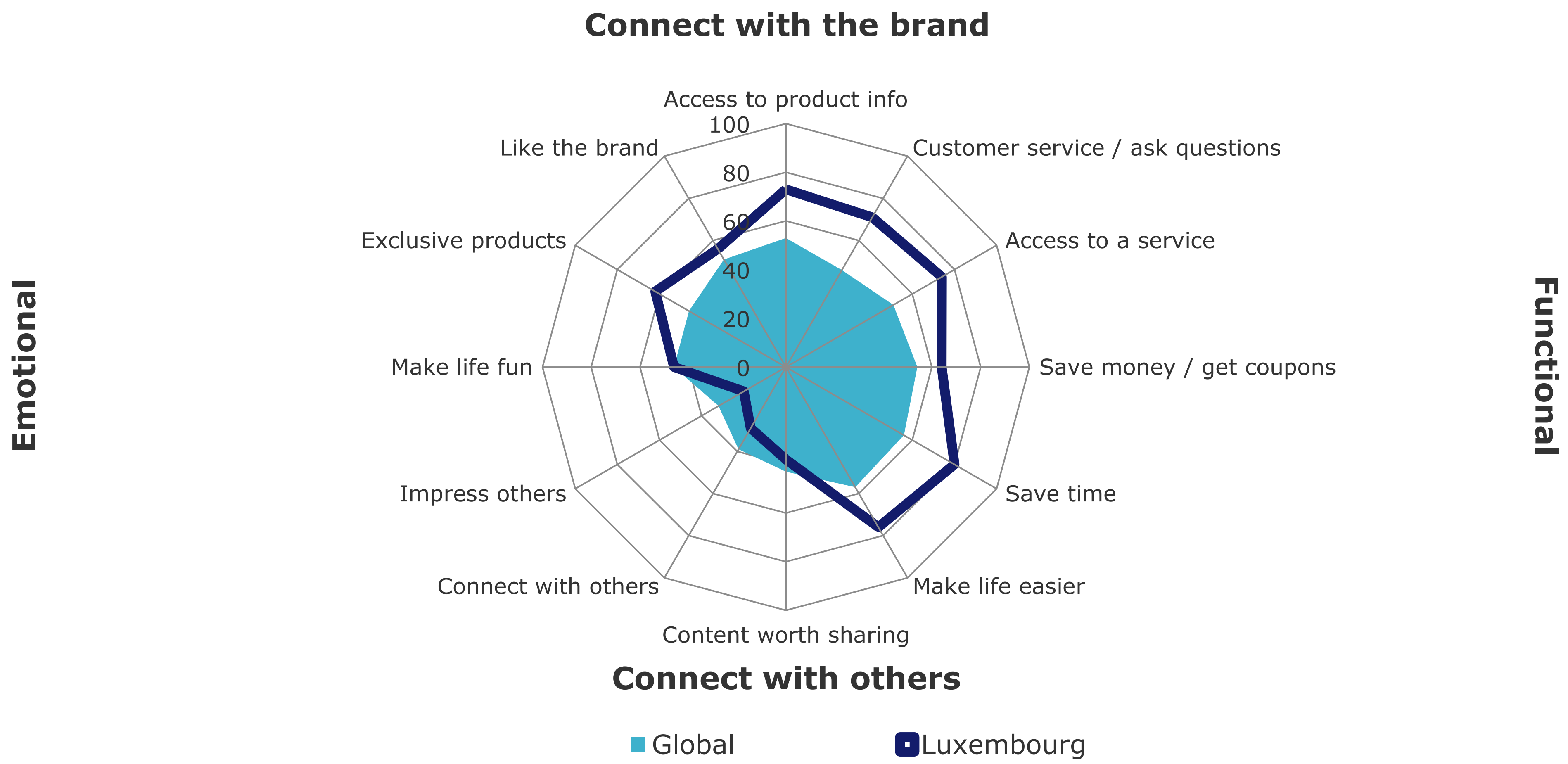
How willing category users are to engage with brands



C6. Categories willing to engage with brands
Base: Category purchasers (975) | Travel (597) | Baby care and parenting (109) | Cosmetics or skincare (398) | Automotive (225) | Technology (618) | Financial services (331) | Household care (361) | Personal hygiene (603) | Alcoholic drinks (424) | Food and drink (748) | Tobacco (174)

Most consumers in Luxembourg engage with brands for mainly functional purposes – accessing product information, online services as well as time and cost savings

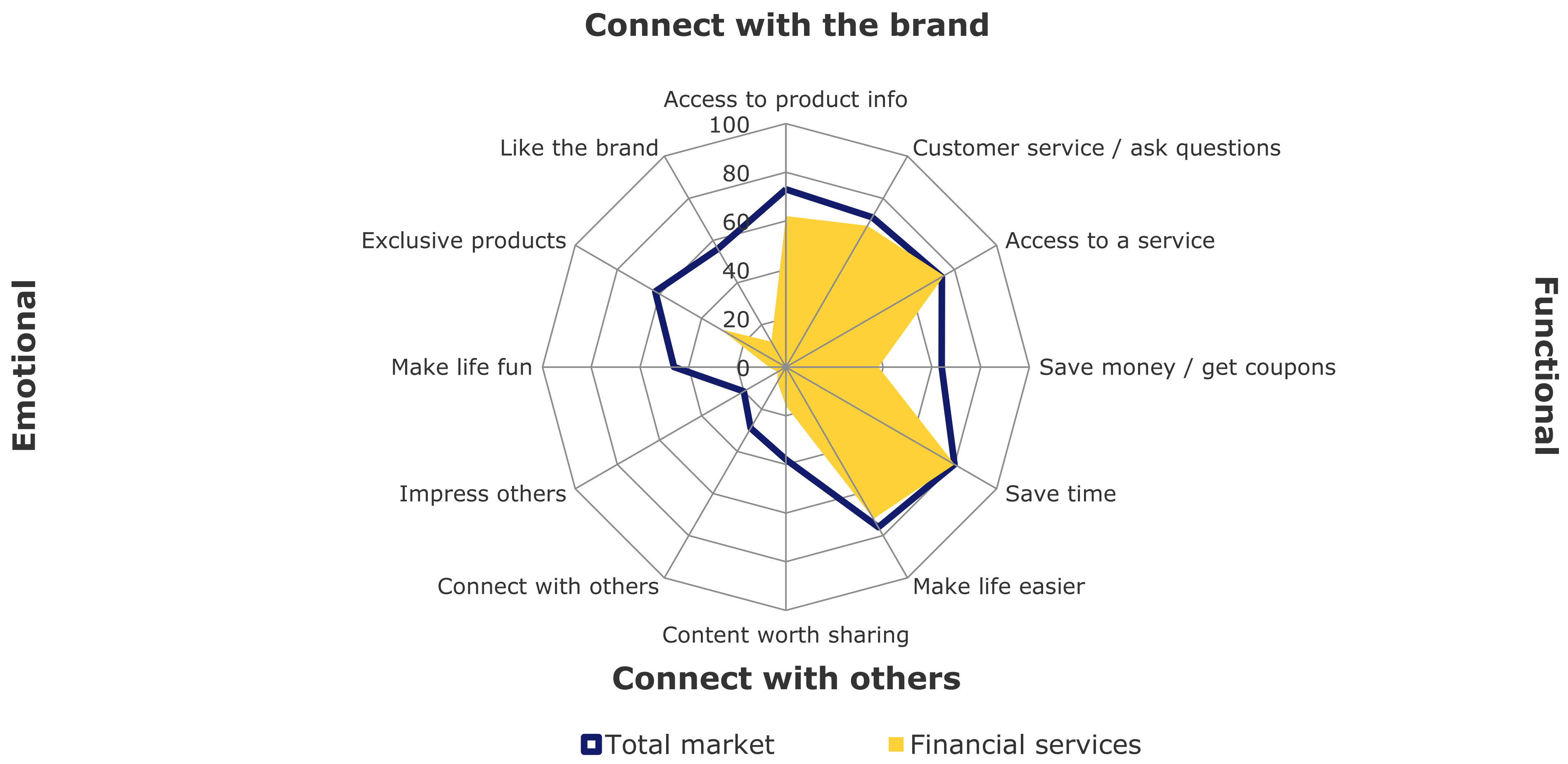
Content needs - Global vs. Luxembourg



C7. Reasons to engage with brands
Base: Respondents willing to engage with brands - Global (43,476) | Luxembourg (826)

Online services, saving time and convenience are the key engagement drivers for Financial services

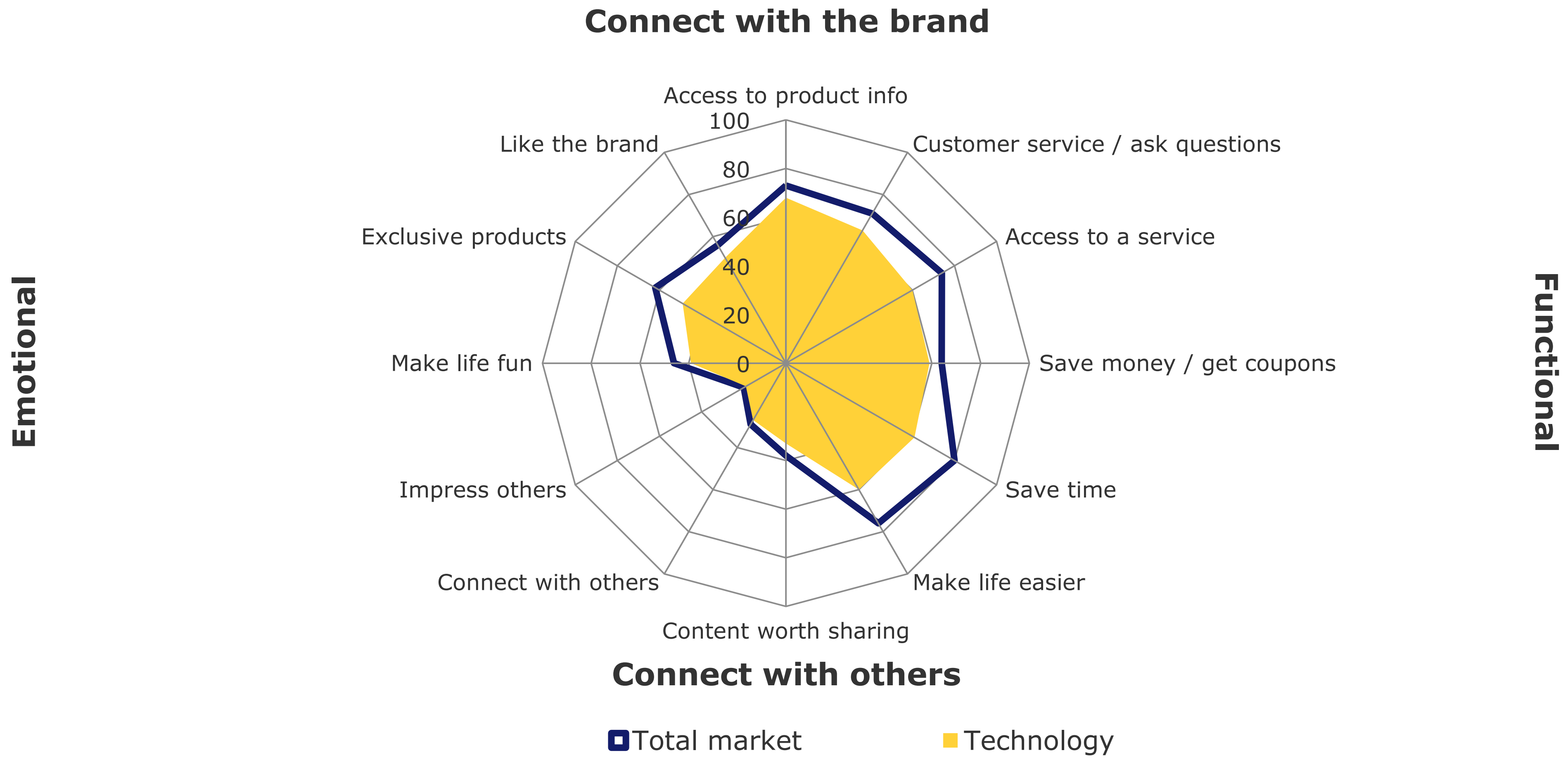
Content needs by category involvement - Total market vs. Financial services



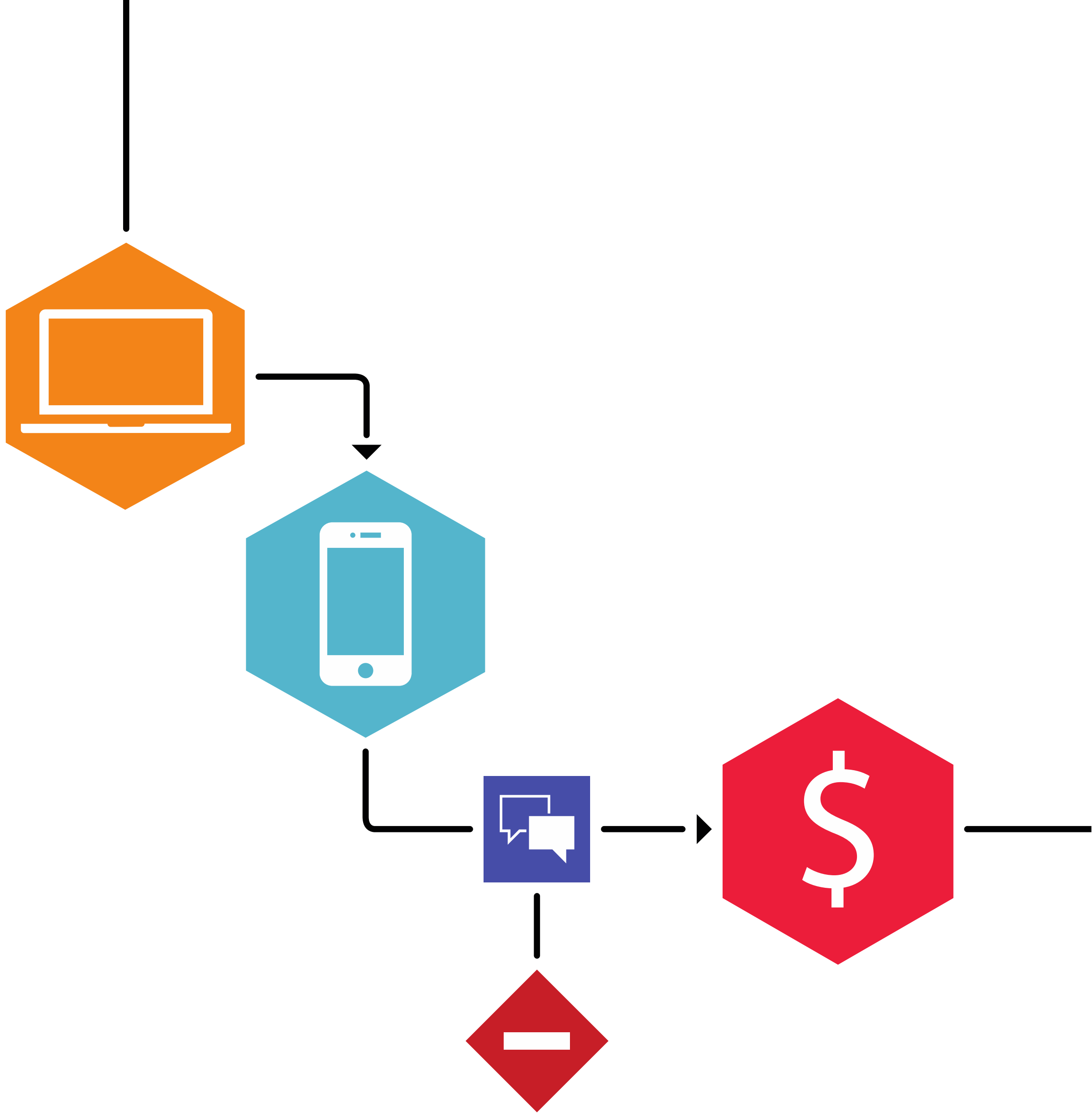
C7. Reasons to engage with brands
Base: Respondents willing to engage with Financial services brands (381)

While in Technology, majority engage with brands for functional reasons

Content needs by category involvement - Total market vs. Technology



C7. Reasons to engage with brands
Base: Respondents willing to engage with Technology brands (386)



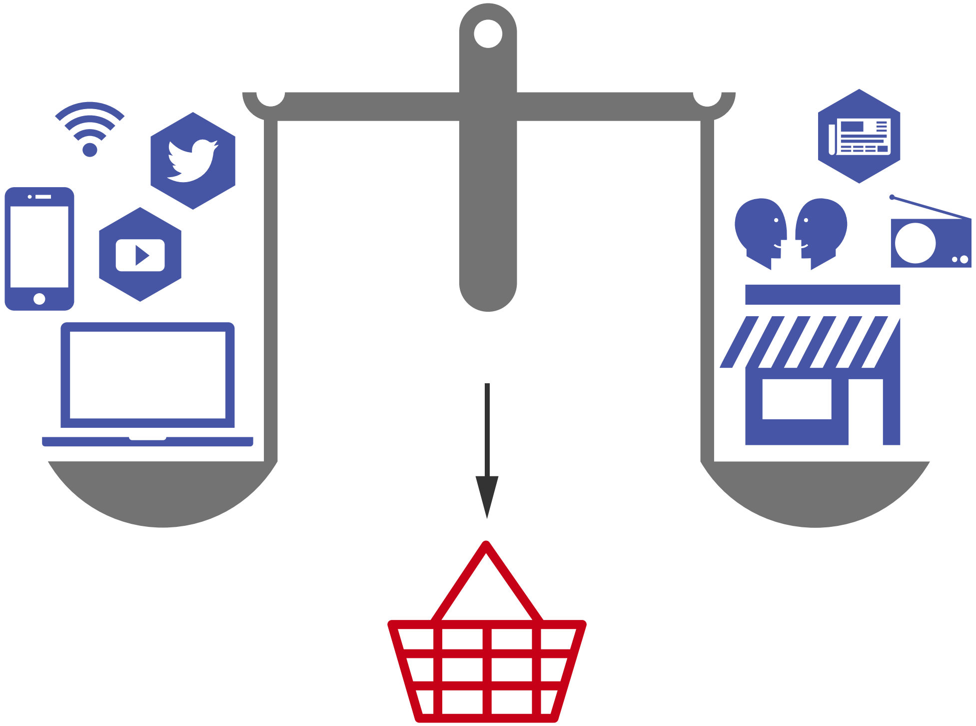
6

Connect on the Path to Purchase

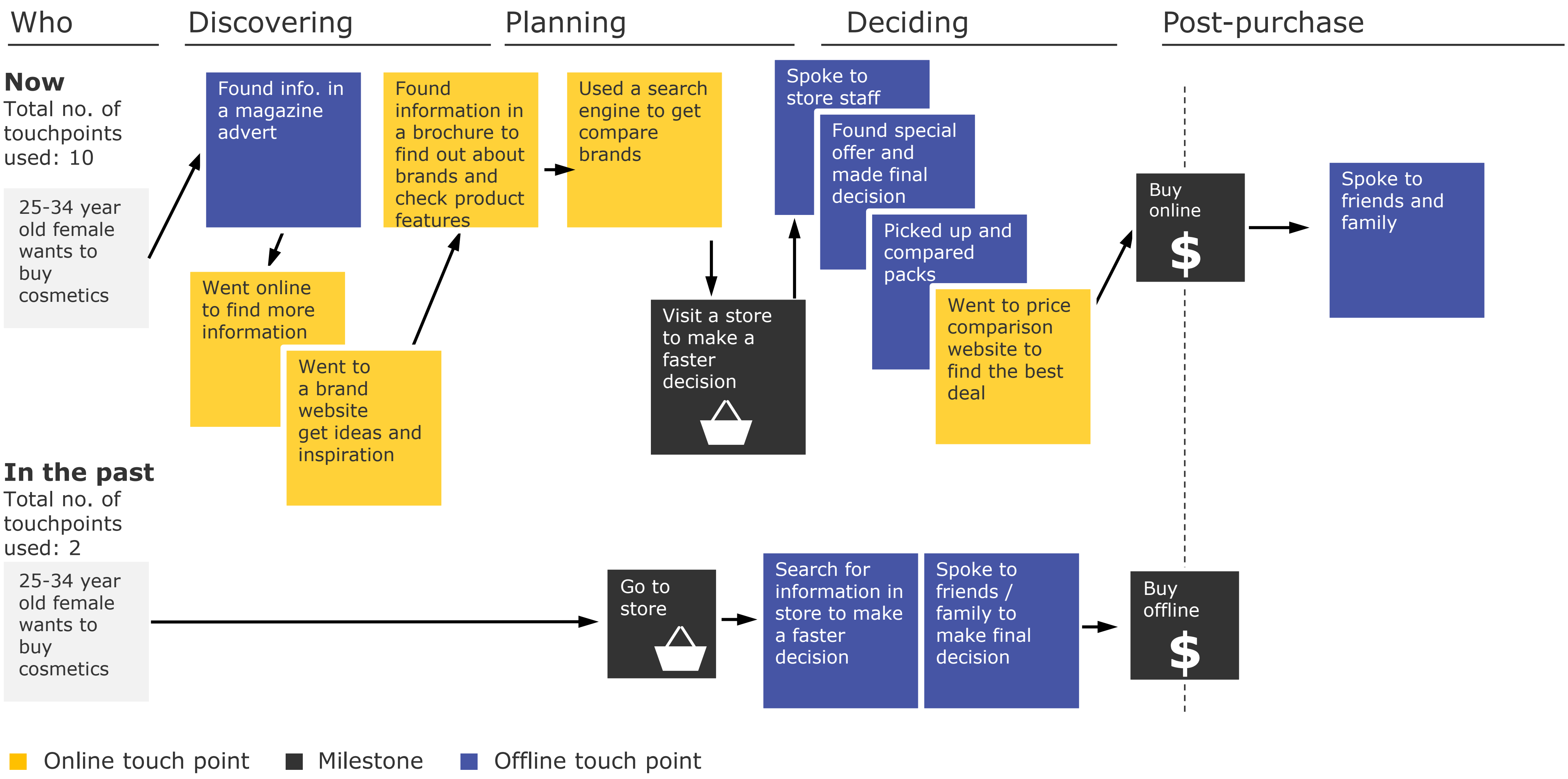
Digital is not always the most influential touchpoint in the Path to Purchase

The **overall influence of digital** is determined by the following factors:

- The level of **digital development** with the market
  - And the **segmentation profile** of the shopper
- The **shopper mission** within each category
  - And whether the shopper is **open or decided** on what brand to buy



As a market becomes more digitally advanced, the number of touchpoints grow

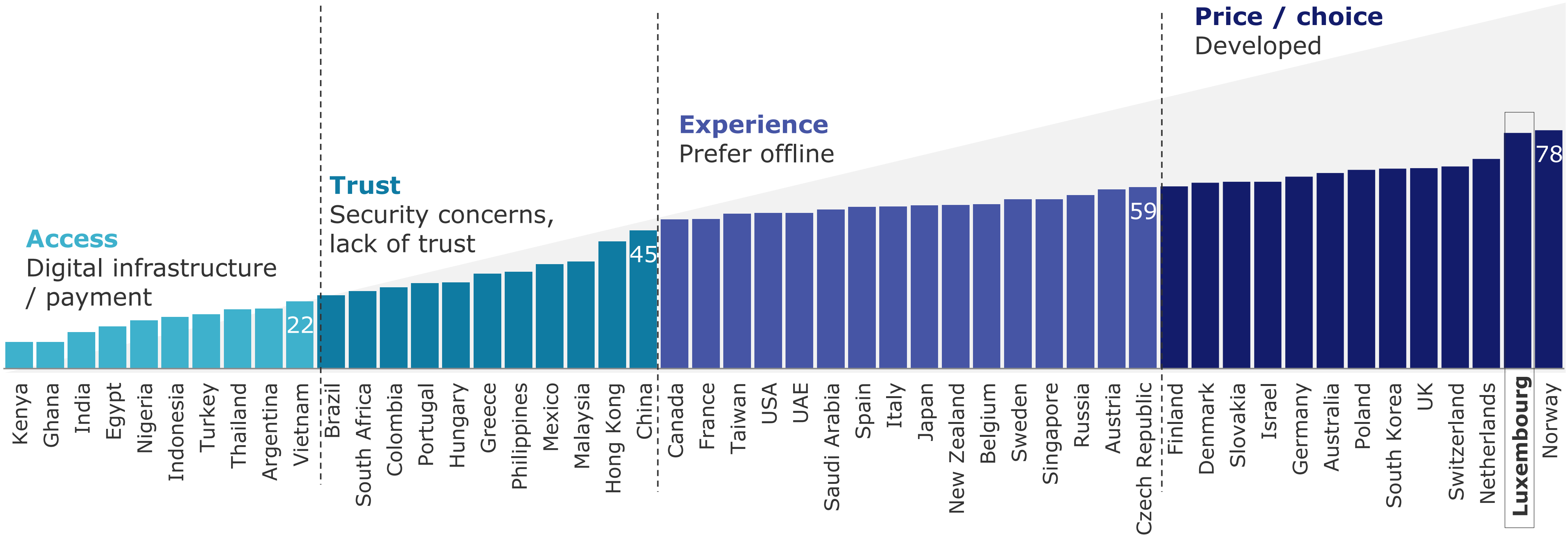


Markets move through the development funnel by addressing key barriers and drivers to eCommerce – Luxembourg can drive further growth through the function of increased price and range competition

Development funnel

To develop a market's eCommerce proposition, key barriers must be addressed

Total category (net) incidence of eCommerce (%)



E3. Purchase made on/offline
Base: Global (54775) | Luxembourg (975)

N.B. The development funnel has factored in internet penetration and is cross-referenced to eCommerce barriers.

Addressing top barriers around delivery cost and quality concerns, as well as leveraging on cost as the top driver will help move Luxembourg through the development funnel and increase the role of eCommerce

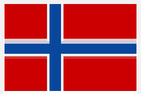
Development funnel

Access
Digital infrastructure / payment

Trust
Security concerns, lack of trust

Experience
Prefer offline

Price / choice
Developed



Lead market
Norway

Luxembourg drivers	
Price or value	71%
Free delivery	70%
Home delivery	69%
Knowing you get the best price	66%
Efficient process	65%

Local market barriers	
Delivery costs	67%
Unsure of product quality	63%
Prefer to touch products	60%
Prefer personal assistance	60%
Want product straight away	55%

Lead market drivers	
Price or value	77%
Knowing you get the best price	76%
Free delivery	74%
Efficient process	68%
Home delivery	67%

Lead market barriers	
Delivery costs	68%
Want product straight away	59%
Easier to buy offline	59%
Unsure of product quality	56%
Prefer to touch products	54%

E5a. Reasons to purchase online | E6. Reasons not to purchase online
Base: Luxembourg (975) | Lead Market (978)

Music and Travel products are most commonly bought online in Luxembourg, with still room for growth for categories such as Groceries, Technology and Financial services

Level of online purchase by category

Groceries
Such as food, personal and household care

Luxembourg	Norway
15%	10%

Pet Food	20%
Cosmetics	17%
Skin care	10%
Household cleaning	8%

Technology
Such as mobile devices, TVs, cameras or white goods

Luxembourg	Norway
28%	45%

Cameras	36%
White goods	28%
Tablets	25%
Mobile devices	22%

Financial Service
Such as insurance, mortgages or banking

Luxembourg	Norway
22%	66%

Banking products	29%
Insurance	17%
Credit cards	14%

Other
Such as travel, clothes, music, baby care, automotive

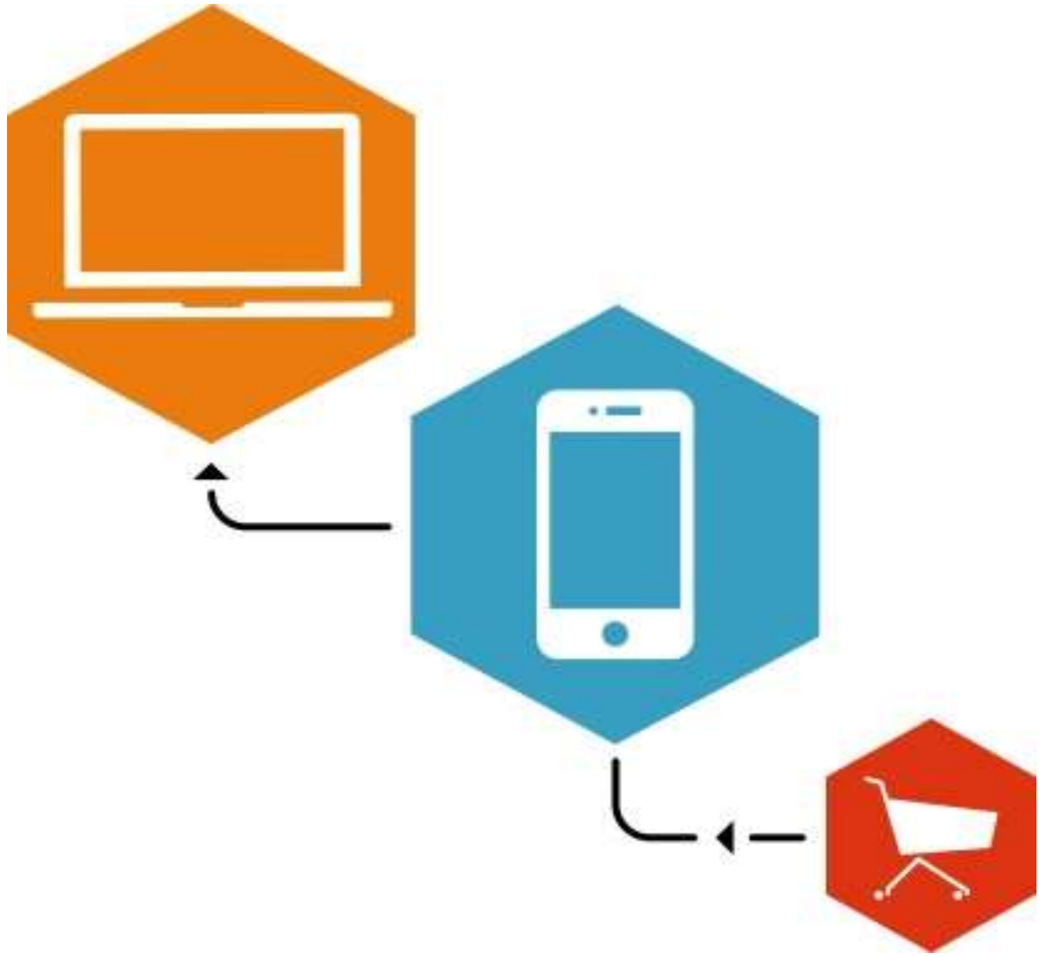
Luxembourg	Norway
49%	57%

Music	78%
Travel	74%
Prams, mats or toys	41%
Baby food, diapers	33%

0% to 20% | 21% to 40% | 41% to 60% | More than 60%

E3. Purchase made on/offline
Base: Luxembourg (975) | Norway (Lead Market) (978)

7
Questionnaire



Media consumption and device ownership provide behavioural context

1 Media consumption

Frequency of using online and offline media:

- Internet
- TV
- Print newspaper
- Print magazine
- Radio

2 Device ownership

Current and likely future technology ownership:

- Computers, tablets, mobile phones, Internet, smart TVs
- Mobile phone brand/OS
- Tablet brand

Activities and daypart usage provide a ‘day in the life’ of a digital user

3 Digital activities

Frequency engaging in various online activities:

- Sharing content
- Consuming content
- Social media (incl. networks used)
- Brand interactions

4 Daypart usage

Media and devices used during the day:

- Amount of time per device/medium
- Daypart segment where each device/medium was used
- Activities for medium/daypart combinations
- Weekday/weekend quotas

Product research/purchase and respondent profiling to understand who shops for what, and how

5 Research/purchase (online and offline)

High level category path to purchase:

- Categories purchased
- Online/offline research by category
- Online/offline purchase by category
- Drivers and barriers toward online purchase

6 Respondent profiles

Attitudes and behaviours:

- Attitudes to and usage of the internet
- Entertainment, decision making, media consumption etc
- Attitudes to and usage of social media

Category touchpoints deep dive current shopping behaviour while future behaviour looks at adoption of rising digital trends

7 Category Touch points

Steps used in purchase path for specific categories:

- Information sources
- How sources helped
- When brand decision is made
- Post-purchase behaviour

8 Future behaviour

Awareness, usage and interest in trends such as:

- Quantified self
- Asset light lifestyle
- Wearable tech
- Connected homes and cars

8

Connected Life pricing, Terms and conditions

Connected Life 2014 deliverables
Can be provided in a number of formats

Standard reports

Data tables

Customised reports

Workshops

Segments

3 000 € (Excluding VAT)

Package of 4 500 € (Excluding VAT)

Customised reports, workshops and datasets focus on target groups in the following categories

Automotive

Motorcycle
New car
Second hand car

Baby care

Baby care products such as food or diapers
Baby care products such as prams, mats or toys

Financial services

Banking products and Investment
Credit cards
Insurance

Travel

Holiday/travel (e.g., airfares, accommodation)

Other

Clothes & shoes
Movies (DVDs or downloads)
Music (CDs or downloads)

Personal care

Cosmetics / facial care products
Hair care products
Skin care products

Personal hygiene

Personal hygiene products (Deodorant, Female hygiene)
Oral Care e.g. toothpaste, mouthwash

Grocery (food and drink)

Food (other than pet or baby food)
Alcoholic Beverages*
Non Alcoholic Beverages
Confectionery, snacks, treats
Tobacco/ cigarettes*

Grocery (non-food, non-personal)

Cleaning/household products (bleach)
Laundry Detergents (fabric care etc)
Over-the-counter medicines (headache, indigestion, cough medicines)
Pet Food
Prescription medicines/Drugs (prescribed by a medical professional)

Key:

Sub- category

*Included based on local regulations

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- The 'client' loses back data and right to use it if they do not buy current wave.

Appendix

Sample profile of 'regular internet users', (defined as using at least weekly), covering over 50 markets around the world

Market	Sample	Methodology
Argentina	941	Offline
Australia	979	Online
Austria	988	Online
Belgium	969	Online
Brazil	963	Offline
Canada	971	Online
Chile*	472	Online
China	1801	Offline
Colombia	473	Offline
Czech Republic	980	Online
Denmark	990	Online
Egypt	932	Offline
Finland	998	Online
France	968	Online
Germany	3930	Online
Ghana	994	Offline
Greece	499	Offline
Hong Kong	960	Online
Hungary	998	Offline
India	1658	Offline
Indonesia	956	Offline
Israel	988	Online
Italy	990	Online
Japan	996	Online
Kenya	1142	Offline
Luxembourg*	**975**	**Online**

Market	Sample	Methodology
Malaysia	954	Online
Myanmar*	1008	Offline
Netherlands	988	Online
New Zealand	988	Online
Nigeria	1434	Offline
Norway	978	Online
Philippines	952	Offline
Poland	979	Online
Portugal	495	Offline
Russia	973	Online
Saudi Arabia	967	Offline
Singapore	964	Online
Slovakia	982	Online
South Africa	974	Offline
South Korea	1311	Online
Spain	1948	Online
Sweden	2013	Online
Switzerland	981	Online
Taiwan	963	Online
Thailand	988	Offline
Turkey	993	Offline
UAE	947	Offline
UK	980	Online
US	1954	Online
Vietnam	980	Offline

NB: Global data cited in this report represents 49 markets and excludes Luxembourg, Chile, and Myanmar

*Fieldwork period: August - September 2014

Methodology and coverage

Market	Methodology	Coverage
Argentina	CLT Web	Urban only
Australia	Online	National
Austria	Online	National
Belgium	Online	National
Brazil	CLT Web	Urban only
Canada	Online	National
China	CLT CAPI	Urban only, Tier 1-3
Colombia	CLT Web	Urban only
Czech Republic	Online	National
Denmark	Online	National
Egypt	Door to Door CAPI	Major cities
Finland	Online	National
France	Online	National
Germany	Online	National
Ghana	Door to Door CAPI	Major cities
Greece	Door to Door CAPI	Urban only
Hong Kong	Online	National
Hungary	F2F CAPI	National
India	Door to Door CAPI	Major cities - Tier I and II
Indonesia	Door to Door CAPI	Major cities
Israel	Online	National
Italy	Online	National
Japan	Online	National
Kenya	Door to Door CAPI	National excl. North Eastern Province
Luxembourg	Online	National
Malaysia	Online	National

Market	Methodology	Coverage
Mexico	CLT Web	Central, West, North, South, Southwest – Urban only
Myanmar	Offline	Urban only*
Netherlands	Online	National
New Zealand	Online	National
Nigeria	Door to Door CAPI	Urban only
Norway	Online	National
Philippines	Door to Door CAPI	Urban only
Poland	Online	National
Portugal	Door to Door CAPI	National
Russia	Online	National
Saudi Arabia	F2F CAPI	Major cities
Singapore	Online	National
Slovakia	Online	National
South Africa	Door to Door CAPI	Major cities
South Korea	Online	National
Spain	Online	National
Sweden	Online	National
Switzerland	Online	National
Taiwan	Online	National
Thailand	Door to Door CAPI	Urban only
Turkey	Door to Door CAPI	Major cities
UAE	F2F CAPI	Major cities
UK	Online	National
US	Online	National
Vietnam	F2F CAPI	Major cities

*Sample coverage for Myanmar subject to change

Sample, Quotas and Weighting

Sample Profile

The sample definition is as follows:

- Regular Internet users aged 16-65 years old. A "regular Internet user" is someone who accesses the Internet at least once a week, on any device

Quotas

To ensure we best represent the regular Internet population, we have used quotas based on the Global Google-TNS Enumeration study*, or better local sources were available. Quotas were applied to:

- Age
- Gender
- Education
- Region
- Weekday / weekend (to gain an accurate understanding of activities)
- Local market specific quotas (such as race, income etc.)

Weighting

Local weights are applied to the same factors that were deemed important enough to quota on. Where this approach was too strict and led to poor weighting efficiencies, weighting was relaxed on those factors with minimal impact (e.g. age or region bands widened) in order to provide an efficiency score above 50%.

Global weights are based on the respective proportion of the global Internet population each market accounts for and are applied when calculating scores combining more than one market

*Random sampling was used in markets where no sampling frame was available (Ghana, Nigeria, Kenya and South Africa)

Regional classification is defined as the below

North America
Canada
USA

Latin America
Argentina
Brazil
Colombia
Mexico
Chile

Middle East and Africa
Egypt
Ghana
Israel
Kenya
Nigeria
Saudi Arabia
South Africa
UAE

Asia-Pacific
Australia
China
Hong Kong
India
Indonesia
Japan
Malaysia
Myanmar
New Zealand
Philippines
Singapore
South Korea
Taiwan
Thailand
Vietnam

Northern Europe
Denmark
Finland
Norway
Sweden

Southern Europe
France
Greece
Italy
Portugal
Spain
Turkey

Western Europe
Austria
Belgium
Germany
Luxembourg
Netherlands
Switzerland
UK

Eastern Europe
Czech Republic
Hungary
Poland
Russia
Slovakia

N.B. Chile is not included in Global or Regional scores due to the time of fieldwork