globalwebindex

Organic Marketing in Fashion

Understanding what steers the fashion conversation

INSIGHT REPORT 2018

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Contents

Introduction

GlobalWebIndex Insights Reports explore some of the most pressing topics for marketers, from traditional vs digital media consumption to audience measurement issues. In this report, we place the spotlight on **Organic Marketing in Fashion.**

This report explores:

- **Why organic marketing matters**
- **What channels brands can use**
- **Differences with high-street fashion consumers and luxury fashion consumers**
- **Key trends in this space**

DEFINING FASHIONISTAS

This report defines fashionistas as people who

- **Are 'very interested' in fashion**
- **Have made a fashion or clothing purchase within the past month**
- **Agree or agree strongly that they like to keep up with the latest fashions.**

Luxury fashionistas are people who:

- **Are 'very interested' in fashion**
- **Have made purchases from two or more luxury fashion brands within the past year**
- **Agree or agree strongly that they like to keep up with the latest fashions.**

For a full list of the fashion brands used, see the the GlobalWebIndex **Knowledge Bank.**

Key Insights

Build prestigious communities. Brands looking to engage fashionistas as advocates can use direct incentives, like rewards or discounts, which appeal to 54% of the audience at a 1.24x greater rate than the general online population. Making fashionistas feel they have insider knowledge to share, that sharing will enhance their prestige, or giving a sense of involvement are all proportionally much more effective.

Money doesn't matter. The blurring boundaries between celebrity endorsements, paid influencers, expert bloggers, and earned media coverage doesn't seem to be of any consequence to fashionistas. Consumerism is not a turn-off, and Paid or not, communications with clear, third-party sources do well.

Names do matter. Trusted sources, like bloggers and celebrities, are important to the fashion-interested audience. Because they're keen to keep up on trends, they're also more attentive than usual to advertising and social posts. Owned media are especially important for brands speaking to fashion audiences.

Acknowledge fashionistas as creatives and experts. People who take an active interest in fashion are also much more likely to make product recommendations to their friends and family, which seems to be a source of pride. The majority think of themselves as creative and want to be noticed.

Don't overlook dedicated sites or niche media. Social media remain crucial routes of brand discovery, research and purchase driving for fashionista audiences, but there's a difference between high-street and luxury fashion consumers. Pinboards, discussion forums and social communities play a relatively greater role for the higher-end consumer. The success of sites like **Chictopia**, which has a more premium look and feel, could be driving this.

Understand brands that succeed in enlisting consumers as advocates. Luxury fashion brands are converting between 20% and 40% of their clients as advocates. Global brands are more successful than smaller and national brands in converting advocates, suggesting that people might be more inclined to make safe suggestions – rather than recommending lesser-known, edgy brands. This would be a challenge for new brands wanting to rely on organic word of mouth, and at odds with the expectation that fashionistas chase novelty.

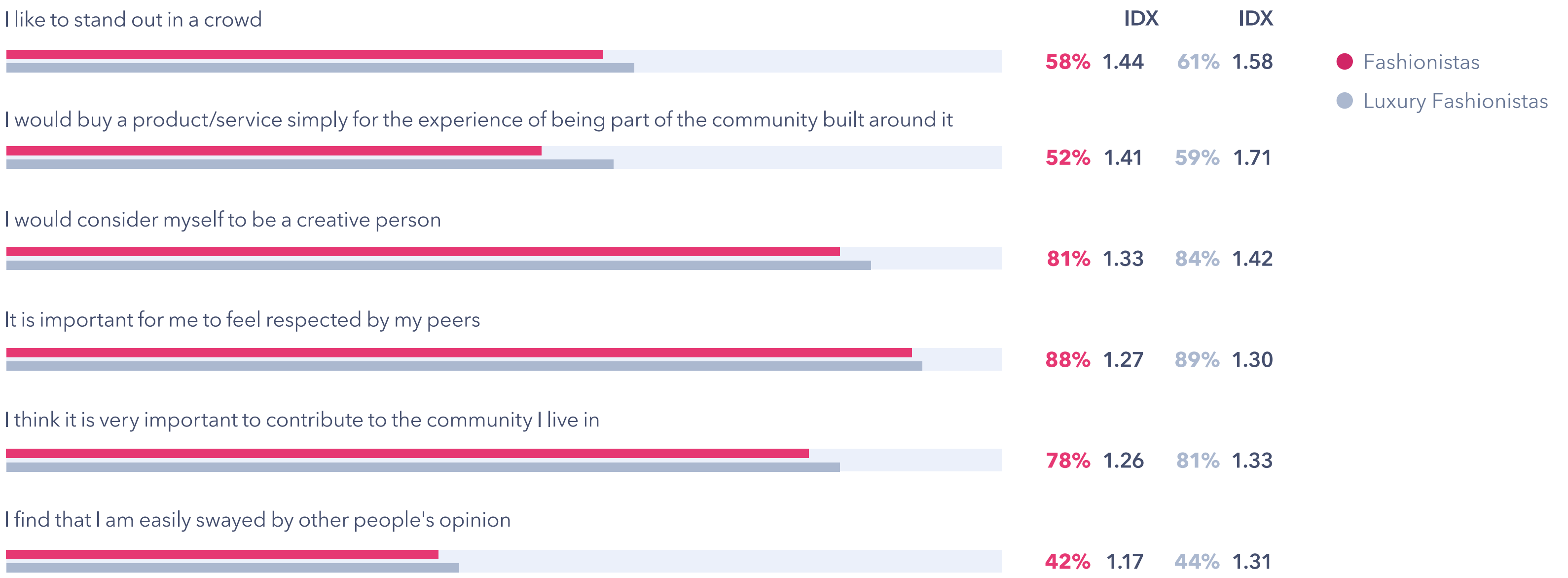
Organic Marketing in Fashion

Why organic marketing makes a difference

Insight Report 2018

Why organic marketing makes a difference

Social and creative



Fashion is an area where paid and owned media play an outsized role – after all, beautiful glossy ads are a large part of why people have historically bought fashion magazines – but the content and products that **fashion brands produce rely deeply on organic conversation, the judgment of informed consumers, and discussion among fashion connoisseurs to thrive.**

Collaborative channels play an outsized role in fashion.

This report contrasts organic marketing with paid marketing. Organic marketing touchpoints are consumer-initiated, whether through word of mouth, recommendations, user-generated social posts, or search: it's the buzz that products and brands generate beyond their direct paid media outputs or partnerships.

Question: To what extent do you either agree or strongly agree with the statements below? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas aged 16-64

Why organic marketing makes a difference

Especially at the higher end of the market, fashion is fundamentally about projecting an image and sending a message, and buyers seem to look for cues that message will be well-received. 4 in 10 describe themselves as 'easily swayed by others' opinions", and more than half would buy a product simply to be part of the community around it. That isn't a unique opinion, but it's 1.4 times more common among fashionistas and 1.7 times more among luxury fashionistas than internet users around the world.

Fashionistas use organic sources to crowdsource their creativity.

Understanding what's in vogue is a big part of the personal enjoyment of being a fashion consumer. And the specific ideas and inspiration for their own choices are an equally important part of what garments you actually pick up. This is a consumer group where 8 in 10 think of themselves as creative – and 6 in 10 want to stand out in a crowd, even as they look to their surroundings. Advertising has an important role to play here, and they're much more receptive to it – in their own view – than the average online consumer.

Luxury fashion consumers are even staying loyal to print, the classic bastion of fashion marketing – 42% of them spend at least an average of 30 minutes per day on print, as do fashion consumers who've posted about fashion online in the past month.

Organic marketing matters because no single brand can define what's in fashion.

The role that social media influencers have taken on in fashion marketing and commerce in the past 5-10 years is testament to the tremendous importance that word of mouth has in the fashion community. This is true whether their content is paid for or not. Endorsement by prestigious sources – magazines, celebrities, vloggers, experts, other users – has particular weight here, whether it's paid for or not.

Whether as private individuals posting product reviews to highly professionalized publishers who openly produce #ads and #sponsoredcontent, influencers bring value by their ability to interpret and intermediate with between fashion labels' own communications and readers.

Why organic marketing makes a difference

Trusted celebrity opinions are crucial to fashionistas.

Sponsored or not, social media influencers maintain their own value by offering an **informed opinion** and curating among all the different labels, garments, colors and options a consumer has when making a fashion decision.

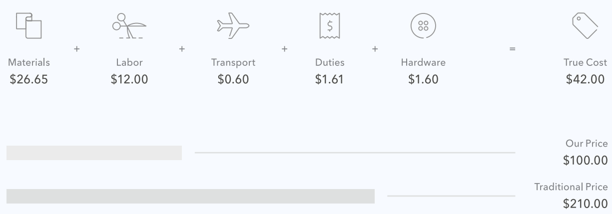
They exist because trusted word of mouth still matters, because buzz surrounding products matters, and because **fashion is equally social** and **ad-driven**. There's a definite prestige scale in sources, going from top-tier celebrities down to word of mouth from social peers. Hence, **successful organic marketing is likely to be top-down, driven by owned media** and partnerships that create content fashionistas will want to share and consume, and where sharing provides a clear benefit.

Money doesn't matter: Prestige does.

			IDX	
Public, professional	Endorsements by celebrities or well-known individuals	27%	1.94	Paid
	Vlogs	23%	1.92	Earned/Paid
	Posts or reviews from expert bloggers	26%	1.85	Earned/Paid
	Recommendations/comments on social media	40%	1.69	Organic
	Forums/message boards	20%	1.57	Organic
Private, personal	Word-of-mouth recommendations	43%	1.38	Organic

TREND IN ACTION

Everlane: Trusted vendor



Everlane is a clothing company started In 2011 with a policy of "radical transparency", which promises to be transparent in every aspect of their business, including pricing and sourcing.

Everlane has published their costs and markups clearly on their website, allowing the consumer to see every expense tied to a particular article of clothing. Everlane uses its website to offers insights into its factories, people and pricing – **bringing the consumer as close as they possibly can, and building lasting relationships as a result.**

The company saw a problem with the fashion industry – the inconsistent marked up prices, often at below par quality – and turned it into an opportunity. They know who their audience is and offer classic, minimalistic, ethically produced products that are built to last. Their approach is working, with more products being rolled out and more consumers wanting to be on the waitlist.

Question: In which of the following ways are you most likely to find out about new brands, products, or services? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas aged 16-64

Organic Marketing in Fashion

Fashionistas and organic marketing in focus

Insight Report 2018

Fashionistas and organic marketing in focus

How fashionistas advocate for brands

	Fashionistas	Luxury Fashionistas
Regularly inform friends and family on new products/services	78%	83%
Posted opinions about fashion/clothing online in the past month	34%	37%
Uploaded a photo/video to a brand's social network page	19%	25%
Shared a brand's post on a social network	20%	27%
Provided ideas for a new product/design	17%	22%

We've found that around **8 in 10 fashionistas regularly inform friends and family of new products and services,** which is an unusually high share. So they're already someone's brand advocates – but there's space for fashion brands to enlist more online advocates. In fact, just 1 in 3 fashionistas post about fashion and clothing online.

8 in 10 fashionistas already advocate for brands.

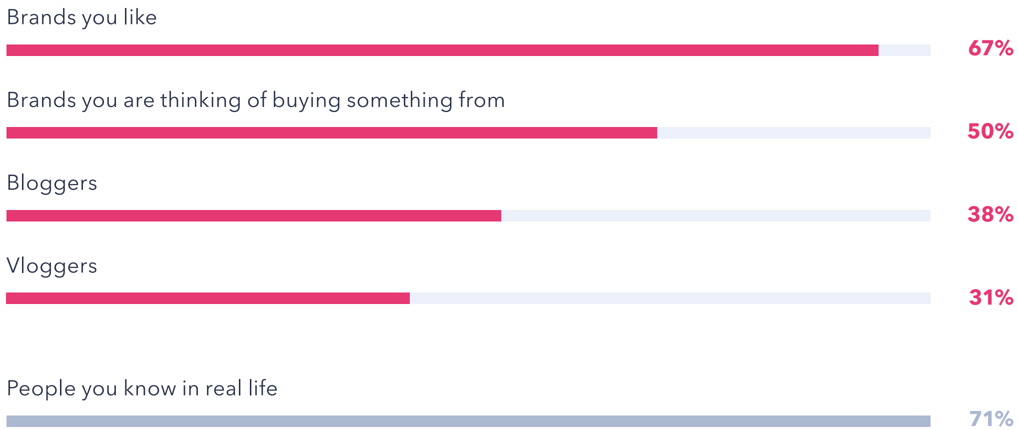
This suggests two things: one, a lot of brand advocacy is taking place offline, and second, being interested in a topic doesn't automatically mean that you'll post online about it. The gap between sky-high brand advocacy rates among fashionistas and the relatively limited number of them who publicly post opinions about fashion and clothing online ties in with the wider trend GlobalWebIndex have spotted, whereby many social channels are becoming **less social and more geared toward content consumption.**

This is a definite challenge for brands that want to use social word of mouth. Even brands that never offer retail discount or membership rewards have been seen to use hashtag competitions to encourage users to share their content. The key seems to be to activate fashionistas as personal creators.

Question: To what extent do you either agree or strongly agree with the statements below? // Which of these products, services or topics have you posted opinions about online in the past month? // Which of the following actions have you done online in the past month? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas, 4,475 luxury fashionistas, 16-64

Fashionistas and organic marketing in focus

Top account types followed by fashionistas



At 67%, brands they like are second only to people they know when it comes to the accounts they follow on social media, so engagement is already high. What we find is that consumerism and self-expression really go hand in hand, closely reflecting the opinions they voice more broadly.

Consumption and self-expression going hand in hand

IDX 1.42 **37%**
Share my opinion

IDX 1.42 **34%**
Share content

IDX 1.34 **55%**
To get inspired/ get ideas

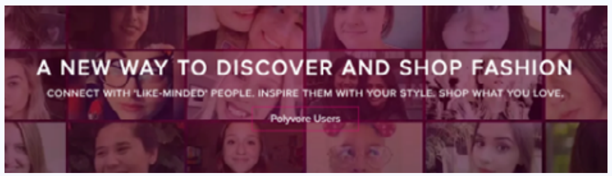
IDX 1.32 **56%**
Research/find products to buy

TREND IN ACTION

Organic Amplifiers: Chictopia, Fashmates, Trendtation

Since its launch ten years ago, Chictopia has managed to build a community of fashionistas that's been resilient to the shifts toward social media that have otherwise drained attention away from many interest-driven websites, while at the same time creating presences across the key channels. With just under 75,000 followers and 200,000 daily pageviews, mostly driven by organic traffic, it's a site that's going strong in its home market, the USA. In China, we've seen pinboard sites like Huaban attract similar community and image driven sites, which also have strong e-commerce connections, and Lookbook.nu is still going strong.

While it's shut down now after being acquired by e-retailer Sssensu, **Polyvore** showed how the social side of fashion could bring millions of consumers into a shared creative space – and successors like **Fashmate** and dedicated **Tumblr** pages are gathering up former users.



Question: Who do you follow on social media? // How important are these reasons for you using the internet? [Answer: Very important] **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas, 4,475 luxury fashionistas, 16-64

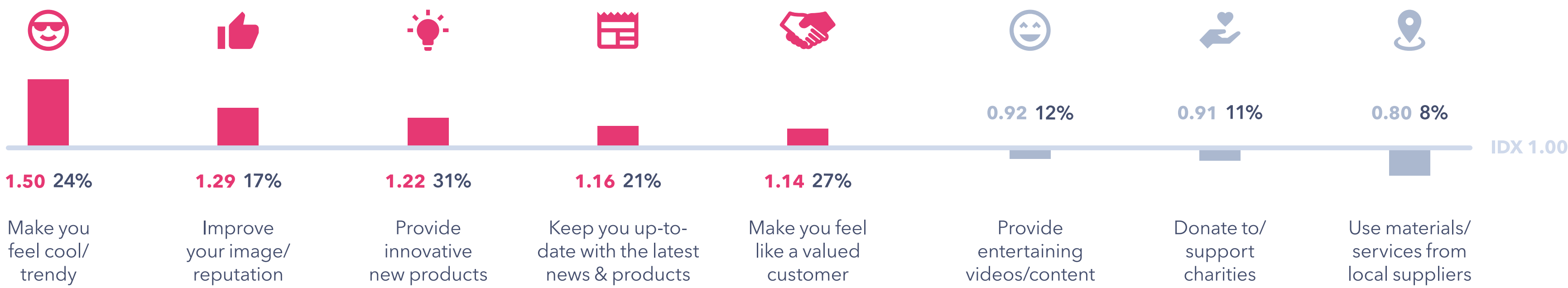
Organic Marketing in Fashion

The organic conversation with fashionistas

Insight Report 2018

The organic conversation with fashionistas

What fashionistas want from brands



Many fashionistas are status-driven.

It's worth considering what fashionista audiences actually expect from brands on a general level before we get into the detail of how brands can engage them. With this audience, those wishes characteristically revolve around **novelty** and **coolness**, and they're more oriented to the **product** itself than many other consumers.

Working with local suppliers or charity collaborations don't rank highly with the audience. It's possible that **fashionistas might pay special attention to sustainability in the fashion realm,** but it isn't something many prioritize when we ask about brands in general. Luxury fashionistas share the same priorities, though **demand for personalization** is more widespread.

DEMOGRAPHICS OF FASHIONISTAS AND LUXURY FASHIONISTAS

Fashion audiences are characteristically **young and female** (67%), and they make up 10-15% of the global online population with particular **prevalence in Latin America.** This skew is associated with overall **higher engagement** across the board. For a fuller overview, see our **Fashionistas Infographic.**

Question: Which of these things do you most want your favorite brands to do/provide? (Max. 3 answers) **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas aged 16-64

The organic conversation with fashionistas

What drives advocacy among fashionistas?

MOTIVATION TYPE			IDX
PRESTIGE	When something enhances my online reputation/status	22%	1.60
PRESTIGE	Having insider knowledge about the brand or its products*	27%	1.47
INCENTIVE	Access to exclusive content or services (e.g. music, videos, etc)*	24%	1.46
APPRECIATION	The feeling of taking part/being involved	30%	1.43
APPRECIATION	When I have a personal/one-on-one relationship with a brand	25%	1.42
APPRECIATION	Love for the brand	47%	1.41
APPRECIATION	High-quality products	65%	1.32
SOCIAL	When something is relevant to my friends' interests	26%	1.30
APPRECIATION	When I've received great customer service	42%	1.30
PERSONAL	When something is relevant to my own interests	42%	1.27
INCENTIVE	Rewards (e.g. discounts, free gifts, etc)*	54%	1.24

Feeling included in a prestigious community is key

Large percentages of fashionistas cite personal appreciation of a brand, its quality and service as reasons they would promote a brand to friends and family – at similar rates as with other consumers. Where fashionistas stand out is their **emphasis on prestige and exclusivity.**

Brands can cater to those desires very directly, if you ask fashionistas themselves. Fashion brands have shown to cater to this longing for insider, exclusive deals in recent years, using pop-up stores, invitation-only events, and building relationships with the brand into a form of social currency that can be shared, tagged and put on show.

**Immediately actionable*

Question: What would most motivate you to promote your favorite brand online? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas, 4,475 luxury fashionistas, 16-64

The organic conversation with fashionistas

How you're likely to engage them organically

● Fashionistas ● Luxury Fashionistas

	Fashionistas IDX	Luxury Fashionistas IDX
Shared a brand's post on a social network	1.80	2.46
Left feedback or a review on a brand's website	1.78	2.22
Read a branded blog	1.77	2.16
Liked/followed a brand on a social network	1.77	1.88
Uploaded a photo/video to a brand's social network page	1.73	2.38
Provided ideas for a new product/design	1.70	2.29
Interacted with a brand on a messaging app	1.69	2.22
Asked a question to a brand on a social network	1.66	2.04
Visited a brand's website	1.32	1.27

Fashionistas – especially ones who've also made luxury fashion purchases in the past year - are considerably more likely than other internet users to do things like share a brand's social posts, upload a picture or video to a brand's social page, or even make a suggestion (1.7x times more). To do this successfully, it's important to stay mindful that **fashionistas think of themselves as creatives,** and will share content **that enhances their prestige,** rather than being purely price-driven.

1 in 6 fashionistas entered a hashtag or picture sharing competition last month.

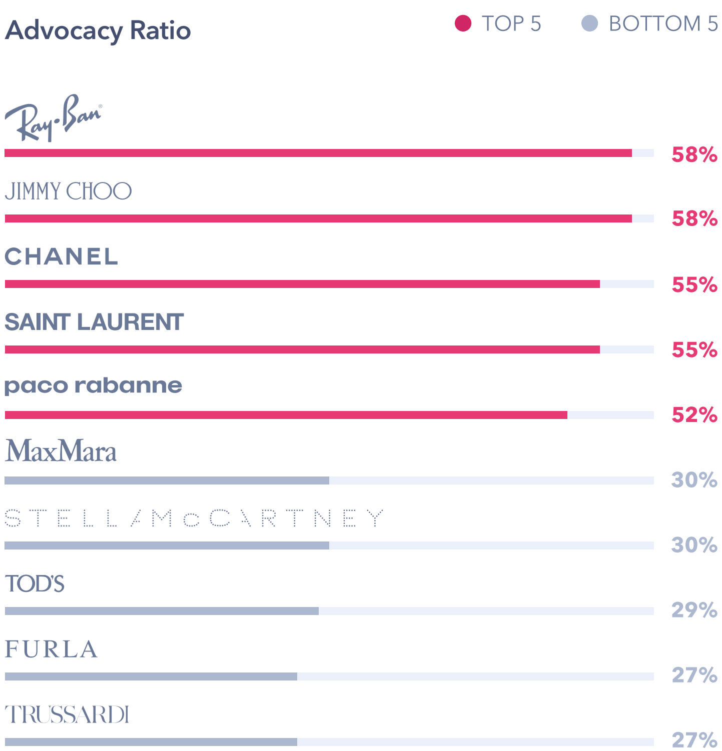
These strategies won't reach every fashionista, but they're much more likely to succeed with that audience than most others, and brands shouldn't shy away from offering direct incentives to fashionistas. After all, this is an audience where huge shares follow celebrity endorsements, paid bloggers and social influencers, and seek out – and pay for – marketing materials from brands. Commercial and transactional doesn't mean fake or undesirable, as long as it's the right content.

88% have posted pictures, 75% have uploaded a video, 56% have posted in forums, and crucially, 58% have left a review of a product or service online within the past month.

Question: Which of the following actions have you done online in the past month? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas aged 16-64

The organic conversation with fashionistas

When the brand offers a way for fashionistas who post about fashion to express something about themselves, their taste and creativity – which we know they value – we see successes. Luxury fashion brands are doing this well: 71% of people who've made a purchase from a basket of 67 luxury fashion brands had also advocated for one or more during the past year, though not necessarily for the brand they made a purchase from.



TREND IN ACTION

Radical Consumer-Centricity

Glossier.

Launched in 2014, Glossier, a direct-to-consumer e-commerce beauty brand, favors **consumer centricity** above all else. The brand is known for communicating directly with its consumers via Instagram, Facebook and YouTube and aims to create a sense of community and belonging. The company's "community-first" ethos is central to who they are.

Glossier works with its consumers throughout the product and **marketing lifecycles** and involves the consumer in everything they do – this includes getting the consumer's input on product design so they create products people want.

The company believes that its "community-first" ethos has been key in building meaningful relationships with consumers and spreading impactful word of mouth. Also, when it comes to influencers, Glossier has had great success in engaging its hardcore fan base rather than high-profile influencers or celebrities. **They want every one of their consumers to be seen as an influencer and they recognize that word of mouth recommendations are extraordinarily powerful when it comes to making a purchase.**

Glossier's President, Henry Davis, summed up the importance of their approach saying: "We can't grow unless we are conversational". **80% of Glossier's new customers come from peer-to-peer channels.** "We want our customers to engage in the product – to understand what it is they're buying, and why, and who we are".

Question: Which of these brands would you advocate to others (e.g. write/post positive reviews about, recommend to family/friends)?
Source: GlobalWebIndex Q2 2018 **Base:** 4,224 luxury fashionistas Aged 16-64

Note: Only asked of consumers who had purchased that brand, i.e. % of Rayban buyers who are advocates.

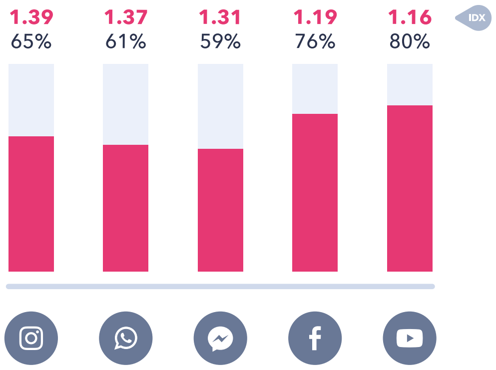
Organic Marketing in Fashion

Channels that matter to fashionistas

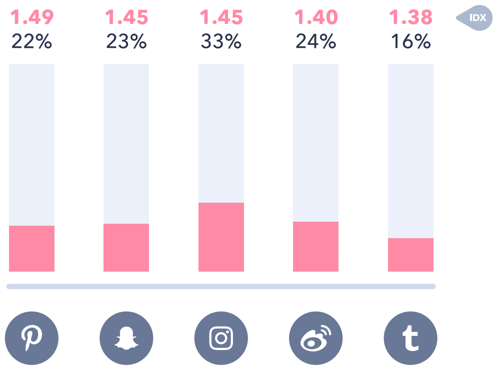
Insight Report 2018

Channels that matter to fashionistas

Top social channels by visits



Top social channels by active contribution



Visual media attract the most active contribution from fashionistas. Outside China, YouTube, Facebook, and Instagram are the most popular social apps and channels for fashionistas globally, but visual first channels dominate when it comes to attracting contributions.

It isn't as distinctly popular with fashionistas as some of the more niche media, but it's nevertheless well worth watching how fashionistas are using YouTube: A full 46% of them have interacted last month, which is 1.2x higher than the average.

Question: Which of the following sites/applications have you visited or used in the past month via your PC/ Laptop, Mobile or Tablet? // Which of the following services have you actively engaged with or contributed to in the the past month via any device? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas aged 16-64

How are they engaging with brands?

Top 10 Social Actions

	IDX
Clicked on a sponsored post	2.32
Followed a brand or company	2.28
Visited a company, brand or product's Instagram page	2.25
Entered a competition by sharing a photo or using a hashtag related to a brand	2.24
Commented on a brand's photo or video clip	2.24
Used the live feature	2.22
Started following a new product or brand	2.22
Tweeted a question or comment about a company, brand or product	2.20
Tweeted or retweeted a celebrity	2.19
Tweeted or retweeted a company, brand or product	2.18

Out of the top 10 highest indexing actions on social channels among fashionistas, 9 relate to brands interactions.

Paid and owned media are the foundation for organic marketing efforts with the fashion crowd. Because they crave novel content and aren't put off by commercialism, as long as they like the source, they're a much more inclined to engage directly with ads and paid content – essentially treating it on par with entertainment content. Compared to the average internet user, they're twice as likely to watch ads and branded content (43% did last month) of their own volition.

For fashion brands, the content area to watch is **tutorials:** 54% of the fashionista crowd watched last month (1.46x times the average). Compared to the glossier, high production value ads – that they'll also gladly consume – tutorial videos tend to be closer in style and content to user-generated content, even if they're produced by paid content providers.

As a form of content that engages users as creative experts and lend themselves to competition formats, tutorials are a key content type that brands should continue to produce and push as long as the trend persists. We see no indication that this trend is fading, and it attracts the same share of luxury fashionistas as ordinary fashionistas.

Question: Which of these things have you done within the last month on Instagram? **Source:** GlobalWebIndex Q2 2018 **Base:** 11,545 fashionistas aged 16-64

Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64.** Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 400,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/ panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education. To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the "weight" of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/ tablet respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download **this document**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q2 2018 wave of research across the following markets, with a global sample of 111,899 respondents, which yielded 11,545 fashionistas.

	TOTAL	Fashionistas
Argentina	1,559	178
Australia	2,282	213
Austria	1,280	119
Belgium	1,266	113
Brazil	2,345	269
Canada	2268	191
China	15,361	1,673
Colombia	1,301	190
Denmark	1,334	79
Egypt	1,771	124
France	3,323	248
Germany	2,846	284
Hong Kong	1,766	188
India	4,138	832
Indonesia	1,788	210
Ireland	1,247	178
Italy	2,807	341
Japan	1,804	60
Malaysia	1,556	115
Mexico	2,605	395

	TOTAL	Fashionistas
Netherlands	1,279	73
New Zealand	1,275	89
Philippines	1,577	161
Poland	1,816	296
Portugal	1,283	153
Russia	2,279	197
Saudi Arabia	1,487	90
Singapore	2,496	248
South Africa	1,528	158
South Korea	1,270	129
Spain	2,784	467
Sweden	1,274	124
Switzerland	1,261	99
Taiwan	1,796	76
Thailand	1,538	159
Turkey	1,577	206
UAE	1,768	230
UK	7,709	844
USA	15,637	1,629
Vietnam	1,618	117

Notes on Methodology: Internet Penetration Rates

ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.** This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2018. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

INTERNET PENETRATION RATES

GlobalWebIndex's forecasts for 2018 based on 2016 ITU data

Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%

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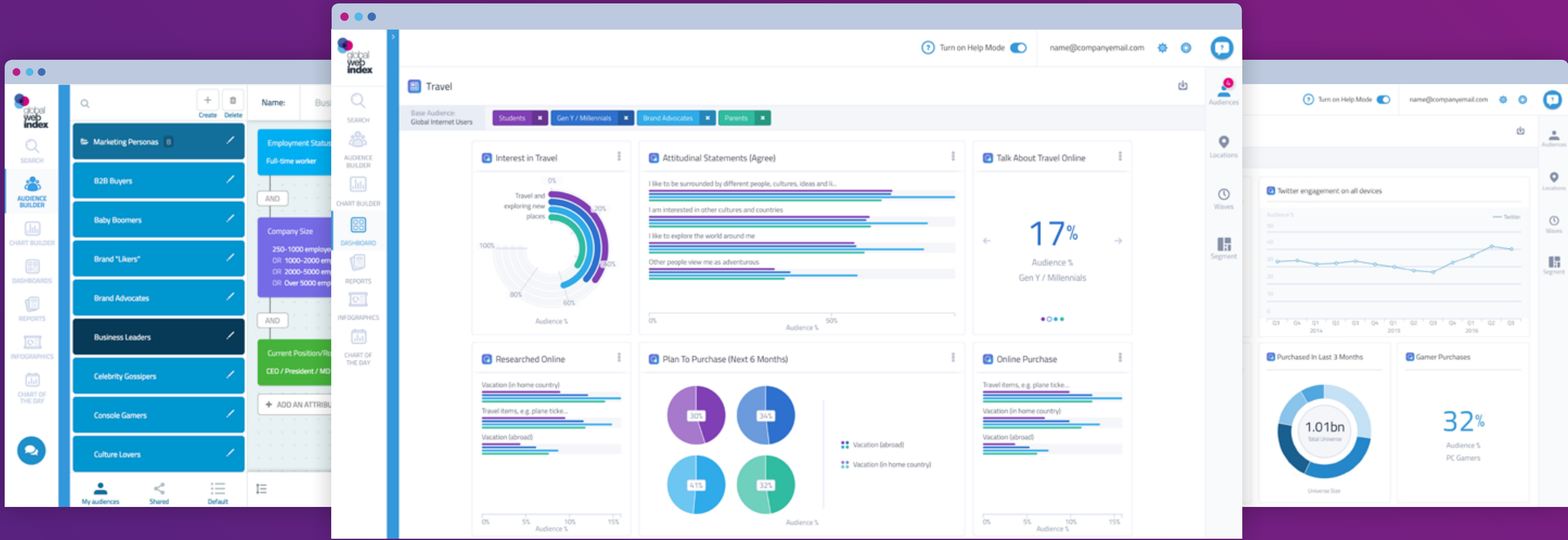

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Run your own custom studies using our panel of 22 million consumers, and get instant access to insight tailored to your business needs.

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