Continuous connectivity is both an opportunity and a threat for brands and retailers.
You would think that our world’s remarkable connectivity would be a marketer’s dream come true—the opportunity to reach consumers anytime, anywhere. But, in reality, connectivity has created unforeseen challenges: siloed and dislocated marketing budgets; global brand builders and retailers that, in most cases, still have not unified their approaches to shoppers; and consumers in both developing and developed markets who are becoming dramatically more sophisticated, often in surprising ways.

The Internet has become a 24-7 activity. More than half of survey respondents say they are connected nearly every waking hour.

Recognizing this challenge, we embarked on the Connected Consumer Study to better understand today’s connected consumers. Who are they, what motivates them, how do they behave, and how do they buy differently? How do they differ in developing and developed markets? What is their online shopping journey?

For the study, we surveyed 10,000 “connected consumers”—those who say they connect to the Internet at least once a week, but oftentimes much more. Our survey includes approximately 1,000 consumers each in the United States, the United Kingdom, Germany, Japan, Brazil, Russia, China, India, South Africa, and Nigeria, and it is statistically significant and census-proper in each market (see appendix: About the Study on page 15).

The findings of our study are fascinating and at times counterintuitive. Here’s the quick view:

• **Continuous connectivity.** The Internet has become a 24-7 activity. More than half of our survey respondents—already chosen because they are already regular users of the Internet—say that they are connected to the Internet nearly every waking hour. On a country-by-country basis, we find Brazil and Nigeria more connected, and Japan and China less so.

• **Four motivations for connectivity.** People go online because it meets four basic, universal needs: interpersonal connection, self-expression, exploration, and convenience. But respondents from different countries were more motivated by different factors. For example in emerging markets and places where offline expression is limited, the ability to express an opinion rates very highly; in more mature markets, exploration and convenience matter more.

• **The power of social media.** Social networks are the places where connected consumers spend the largest amount of their time online. Social networks and social marketing are very effective in generating brand interest and purchases among younger consumers. However, the number of users on a social network is not necessarily an indication for engagement or, importantly, purchases. Furthermore, different social media sites display different usage patterns in different countries.

• **Pop-up ads’ surprising effectiveness—but only in some markets.** In some emerging markets, particularly Brazil, China, and Nigeria, pop-up ads and banners are surprisingly effective. Respondents from those three countries say they don’t mind the ads and often click on them to see what’s up. In Western Europe and the United States, these ads are far less effective.
The convergence of physical and online stores. While most purchases today are still made in store, more than half of the survey respondents say they prefer shopping online as well as the online experience. Connectivity does not mean that consumers do everything online, but being connected offers access, speed, and convenience, and enhances the overall experience.

The following sections examine the results in detail and highlight the implications for retailers and brands.

Continuous Connectivity

More than half of the connected consumers we surveyed say they are “continuously connected”—that is, they are online practically every waking hour (see figure 1). With smartphones, tablets, and computers, most of our respondents comfortably move among different platforms, applications, and websites to inform themselves, search for products, interact with others, and make purchases.

Figure 1
For most, connectivity is a continuous activity

Frequency of connection (% of respondents)

Continuous connectivity varies by country. In countries such as Brazil and Nigeria, with younger populations and solid smartphone penetration, two-thirds of respondents say they are continuously connected. In Japan and China, less than 40 percent of respondents say the same.

The respondents who are continuously connected tend to be younger and single. Gender was not a statistically significant indicator of connectivity (see figure 2 on page 3).

Even as smartphones become a common way to log into the Internet, 64 percent of the continuously connected consumers in our survey prefer using PCs to connect—ranging from 79 percent in Japan to 47 percent in China, where 31 percent of the continuously connected
Connected Consumers Are Not Created Equal: A Global Perspective

say they prefer smartphone connections. Preferences for smartphones among the continuously connected class also varied significantly from country to country, with emerging markets rating higher than developed markets. Only 12 percent of global connected consumers frequently use tablets to connect to the Internet.

The Four Motivations of Connected Consumers

Our survey identifies four important motivations for connected consumers across the globe. We asked respondents to tell us how important each motivation was for why they go online (see figure 3 on page 4).

1. **Interpersonal connection.** People clearly crave connection with each other. Seventy-three percent of survey participants say this is a key reason they go online. This is particularly evident in places such as India (94 percent), Nigeria (89 percent), and China (88 percent), where work takes people far from home, as well as Brazil (89 percent), where family ties are strong and social media has taken off fast. In Japan (34 percent), the lower scores may be a result of the many preexisting social structures that bind friends and family together.

2. **Self-expression.** We all have our opinions about world events or the latest TV show but never before have we been able to broadcast these opinions so widely, even to people we do not know. Connectivity allows us to express ourselves and be heard. This is particularly true in emerging markets and places where offline self-expression is limited. In these countries, social networks have enabled a degree of “democratization.” In China, Nigeria, and India, more than 85 percent of respondents say that the ability to express their opinions is a key reason for being online.

In addition, the ability to share one’s creativity, on “creative” social networks such as Pinterest or in photo feeds on Instagram or Facebook, is important to 68 percent of consumers across the world. This is particularly true in China (93 percent), India (88 percent), and Brazil (85 percent).
3. **Exploration.** We are curious beings, and we like to continuously explore the world around us. The Internet empowers our curious tendencies and is widely used to satisfy our thirst for knowledge. Globally, 95 percent of respondents agree that the need for exploration—that is, to find and learn new things—is a primary motivator for going online, making it the universal need.

Connectivity allows us to express ourselves and be heard—**particularly in places where offline self-expression is limited.**

4. **Convenience.** Whether finding products and services, navigating a street in an unknown city, or seeking entertainment, the connected consumers we surveyed almost universally find convenience central to their desires to go online. For instance, 83 percent of connected consumers have a desire to choose their own entertainment (music, videos, or games), whenever and wherever they want it. Similarly, 92 percent of respondents say they use the Internet to access products and services. In developed markets, being a connected consumer provides incredible depth and convenience; in developing markets, it broadens consumer access. Convenience means different things to different people, but there is no question that it is a main reason to stay connected.
Social Networks: The Town Center for Connected Consumers

Brands and retailers always aim “to be where the consumer is,” and indeed our survey findings indicate that social networks are indeed the place to be. Overall, 46 percent of respondents say social networking accounts for the largest portion of their time online, although at the country level there are some differences (see figure 4). In Brazil, Nigeria, India, and Russia, more than half of respondents say social networks consume the greatest amount of their online lives, ahead of entertainment, shopping, and transactional services such as banking. In the United States, Germany, and Japan, the percentages are 40 percent and lower, in favor of more transactional purposes such as shopping.

Figure 4
Connected consumers spend most of their online time on social networks

But within the social media bucket are many different platforms with a wide variation of commitment and use. Yes, Facebook and Twitter are at most connected consumers’ fingertips; however, use of those platforms (and others) is quite different depending on the country.

China and the United States offer a good study in the contrasts (see figures 5 and 6 on page 6). In the United States, although 53 percent of respondents have a Google Plus account, far fewer consider themselves “active” (that is, they write and post on the network) or even log in daily. Similar patterns are observed on other social networks—except for Facebook.

In China, where there are many homegrown social media sites, the landscape is quite different. Qzone has nearly universal participation, and daily logins show the intensity of China’s connected consumers. Weibo and Tencent QQ reflect a much more intense online activity than the U.S.’s second- and third-ranked social networks. It’s little wonder that Alibaba’s recent IPO popped off the charts.
**Figure 5**
**In the United States, having a social network account does not guarantee engagement**

**User penetration by social network, United States**

<table>
<thead>
<tr>
<th></th>
<th>Have an account</th>
<th>Are very active(^1)</th>
<th>Log in daily</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>81%</td>
<td>51%</td>
<td>+10%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>54%</td>
<td>12%</td>
<td>-67%</td>
</tr>
<tr>
<td>Google Plus</td>
<td>53%</td>
<td>13%</td>
<td>0%</td>
</tr>
<tr>
<td>Twitter</td>
<td>37%</td>
<td>11%</td>
<td>-18%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>34%</td>
<td>15%</td>
<td>-67%</td>
</tr>
<tr>
<td>Instagram</td>
<td>23%</td>
<td>13%</td>
<td>-38%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>11%</td>
<td>5%</td>
<td>-40%</td>
</tr>
</tbody>
</table>

\(^1\)“Post on network” (versus just reading feeds)
Source: A.T. Kearney analysis

**Figure 6**
**Chinese connected consumers have higher engagement across different networks**

**User penetration by social network, China**

<table>
<thead>
<tr>
<th></th>
<th>Have an account</th>
<th>Are very active(^1)</th>
<th>Log in daily</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qzone</td>
<td>99%</td>
<td>80%</td>
<td>-15%</td>
</tr>
<tr>
<td>Weibo</td>
<td>97%</td>
<td>77%</td>
<td>-19%</td>
</tr>
<tr>
<td>Tencent QQ</td>
<td>92%</td>
<td>62%</td>
<td>-37%</td>
</tr>
<tr>
<td>Penguoy</td>
<td>76%</td>
<td>44%</td>
<td>-59%</td>
</tr>
<tr>
<td>Kaixin001</td>
<td>77%</td>
<td>42%</td>
<td>-62%</td>
</tr>
<tr>
<td>Renren</td>
<td>81%</td>
<td>44%</td>
<td>-57%</td>
</tr>
<tr>
<td>51.com</td>
<td>62%</td>
<td>35%</td>
<td>-71%</td>
</tr>
<tr>
<td>Douban</td>
<td>74%</td>
<td>44%</td>
<td>-61%</td>
</tr>
</tbody>
</table>

\(^1\)“Post on network” (versus just reading feeds)
Source: A.T. Kearney analysis
From Connection to Consumption

For retailers and brands, there remains an overriding question: How does connectivity translate into consumption? Does connectivity influence purchasing decisions, and if so, how?

We sought to understand how our survey respondents view and react to, and are influenced by, online marketing:

**Banners and pop-ups.** In mature countries, banners and pop-ups often generate rolls of the eyes, but in some of the developing markets we surveyed, they remain effective engagement tools. The majority of consumers in South Africa, Brazil, India, China, and Nigeria are open to online ads and willing to check out the offers behind them. In Nigeria, 93 percent of respondents say they click on banners and ads at least sometimes, and 70 percent say they find them relevant or useful. Respondents from India (84 percent) and China (83 percent) also say they click on banners at least sometimes, although they are somewhat less enthusiastic about their value.

On the other hand, just 7 percent of American respondents say they click on banners and advertisements, and only 6 percent say they find them useful or relevant—the vast majority are either bothered by them or ignore them.

**Social media “likes” and comments.** We wanted to understand whether buying decisions are based on what’s happening in the social network of a connected consumer. How much social media influences shopping decisions correlates closely to age, our survey shows. More than two-thirds of respondents 35 and younger say they either frequently or occasionally base their buying decisions on what’s happening in their social networks; in contrast, more than 80 percent of respondents older than 65 say that they rarely or never base their buying decisions on what’s happening in their social networks (see figure 7 on page 8).

The differences by country are also stark. Between two-thirds and three-quarters of connected consumers in the United States, United Kingdom, Germany, Japan, and South Africa say they rarely or never consider social media chatter when evaluating products, services, and brands. On the other hand, the majority of connected consumers in China, India, Russia, Brazil, and Nigeria either occasionally or frequently use social networks in shopping. Chinese consumers, in particular, value social media commentary: almost 95 percent say they occasionally or frequently use social networks to evaluate products, services, or brands.
Shopping Preferences vs. Behaviors

The vast majority of purchases today are made in physical stores, yet 54 percent of connected consumers say they prefer shopping online (see figure 8 on page 9). When they shop online, pure-play online retailers are the most popular destinations (see figure 9 on page 9). These results highlight the growing importance of the multichannel shopping experience. Consumers may check prices and talk to friends online on their way to the store, or, conversely, they may shop for items in the store, then go online to evaluate products and then buy them. Nearly half of respondents use their smartphones to check prices or product information while in the store.

China is the clear leader in our study, with 84 percent expressing a preference for online shopping; more than 60 percent of Brazilian and Indian consumers say the same. On the other hand, fewer than 35 percent of consumers in Russia, Japan, and South Africa prefer online shopping. These numbers are slightly higher for continuously connected consumers, where the global average of people preferring to shop online is as high as 59 percent (vs. 48 percent for our less-connected respondents).
Figure 8
Connected consumers prefer to shop online

% who say they prefer to shop online

![Bar chart showing the percentage of people who prefer to shop online in different countries.](chart)

Source: A.T. Kearney analysis

Figure 9
Consumers are increasingly using multichannel offerings, but online the pure-play leaders stand out

Online shopping destinations (% of respondents)

<table>
<thead>
<tr>
<th>Website type</th>
<th>Global</th>
<th>United States</th>
<th>United Kingdom</th>
<th>Germany</th>
<th>Japan</th>
<th>Brazil</th>
<th>Russia</th>
<th>China</th>
<th>India</th>
<th>South Africa</th>
<th>Nigeria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pure-play online retailer</td>
<td>84%</td>
<td>89%</td>
<td>91%</td>
<td>91%</td>
<td>92%</td>
<td>78%</td>
<td>68%</td>
<td>93%</td>
<td>87%</td>
<td>65%</td>
<td>86%</td>
</tr>
<tr>
<td>Mass merchant</td>
<td>39%</td>
<td>56%</td>
<td>50%</td>
<td>49%</td>
<td>19%</td>
<td>68%</td>
<td>16%</td>
<td>53%</td>
<td>23%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Department store</td>
<td>32%</td>
<td>34%</td>
<td>35%</td>
<td>22%</td>
<td>7%</td>
<td>75%</td>
<td>43%</td>
<td>19%</td>
<td>32%</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td>Ticket</td>
<td>30%</td>
<td>42%</td>
<td>29%</td>
<td>29%</td>
<td>15%</td>
<td>37%</td>
<td>26%</td>
<td>22%</td>
<td>45%</td>
<td>38%</td>
<td>11%</td>
</tr>
<tr>
<td>Airline or hotel</td>
<td>30%</td>
<td>47%</td>
<td>32%</td>
<td>22%</td>
<td>15%</td>
<td>35%</td>
<td>25%</td>
<td>22%</td>
<td>32%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Travel aggregator</td>
<td>28%</td>
<td>41%</td>
<td>23%</td>
<td>33%</td>
<td>31%</td>
<td>32%</td>
<td>16%</td>
<td>21%</td>
<td>44%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Flash sale</td>
<td>28%</td>
<td>30%</td>
<td>19%</td>
<td>24%</td>
<td>10%</td>
<td>40%</td>
<td>30%</td>
<td>20%</td>
<td>41%</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>Specialty store</td>
<td>24%</td>
<td>35%</td>
<td>23%</td>
<td>20%</td>
<td>15%</td>
<td>34%</td>
<td>30%</td>
<td>25%</td>
<td>20%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Drug store</td>
<td>18%</td>
<td>17%</td>
<td>24%</td>
<td>25%</td>
<td>10%</td>
<td>18%</td>
<td>16%</td>
<td>33%</td>
<td>8%</td>
<td>15%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: A.T. Kearney analysis
When asked what products they shop for online, respondents identify a wide array of items, indicating e-commerce’s evolution and its geographical differences. Clothing, electronics, books, music, and services rate highly, but bigger-ticket items such as home appliances and furnishings also rate high (see figure 10).

Fifty-four percent of connected consumers prefer shopping online.

The results are not only a tale of consumer confidence and e-commerce adoption, but also of the evolution of e-commerce within specific countries and categories. For example, the United States has low grocery penetration due to fragmented grocery retailing and its vast geography, whereas the smaller, more concentrated UK market has much higher online grocery sales, especially driven by well-developed offers already in place for more than a decade (led by Tesco.com).

Respondents’ favorite online sites include, at a global level, Amazon and eBay, but several local favorites emerge as well—Jumia in Nigeria, Ozon in Russia, Flipkart in India, and Jingdong and Lynx in China are just a few.

Figure 10
Electronic goods, apparel, and books are among the most popular online categories

<table>
<thead>
<tr>
<th>% respondents who say they have bought online in the past three months</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Global average</strong></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td><strong>Electronics</strong></td>
</tr>
<tr>
<td><strong>Home appliances</strong></td>
</tr>
<tr>
<td><strong>Home furnishings</strong></td>
</tr>
<tr>
<td><strong>Fashion and apparel</strong></td>
</tr>
<tr>
<td><strong>Sports and outdoor</strong></td>
</tr>
<tr>
<td><strong>Beauty products</strong></td>
</tr>
<tr>
<td><strong>Household items</strong></td>
</tr>
<tr>
<td><strong>Groceries</strong></td>
</tr>
<tr>
<td><strong>Toys, kids, and babies</strong></td>
</tr>
<tr>
<td><strong>Tickets</strong></td>
</tr>
<tr>
<td><strong>Music and games</strong></td>
</tr>
<tr>
<td><strong>Books</strong></td>
</tr>
<tr>
<td><strong>Services</strong></td>
</tr>
</tbody>
</table>

Source: A.T. Kearney analysis
Emerging Connected Consumer Segments

In the end, considering the differences in connectivity and shopping preferences, four unique consumer segments emerge, based on connectivity levels and consumption preferences (see figure 11).

**Online champions.** Online champions like being online—surfing the Internet, interacting on social networks, or buying products and services. They buy the widest range of products online and are the heaviest users of smartphones. Social networks have a strong influence on their purchasing—they engage intently with brands on social networks and are heavily influenced by “likes.” Most click on ads and banners while surfing and are also the most likely to actually purchase something following ads. They are really the digital marketer’s dream.

This segment is dominated by developing markets, indicating the relative “newness” of the Internet in those countries. Brazil, China, India, and Nigeria have at least a 30 percent share of online champions. The United States, United Kingdom, and Germany are close to the global average, while Japan, Russia, and South Africa have relatively lower shares, indicating a relatively lower preference for shopping online (see figure 12 on page 12).

**Social animals.** Social animals are online, like to connect with people, enjoy entertainment, surf the Web, and like their smartphones, but they shop offline because that remains an important social experience for them. They do buy online, but at a lower level than online champions. They have a good brand engagement on social networks and consider “likes” to some extent when making a purchase. They are most likely to use the Internet to evaluate their available options before deciding to do what they want. Online ads don’t really work with them as the conversion from clicks to purchasing is low. Due to their high online presence they are a good segment to target, but are relatively tough nuts to crack.

In developing markets with high shares of online champions—Brazil, China, India, and Nigeria—this segment is much smaller than the online champions. Only 5 percent of Chinese...
respondents are categorized as social animals. This is because so few prefer offline shopping channels—the consumers in our sample who spend a lot of time online also tend to buy online, with online convenience outweighing the social aspects of shopping in stores. For the United States, United Kingdom, and Germany, social animals are the smallest category; in Japan, Russia, and South Africa, this segment is big.

**Transactionals.** These consumers represent the most pragmatic segment. They don’t spend quite as much time online, but when they do, they are focused and know what they want. Their preferred shopping destination is online, though there are far fewer categories in which they buy online. They tend to use their smartphones selectively and are more likely to be driven by a specific need to go online. They are somewhat similar to the online champions when it comes to brand engagement on social networks, being influenced by “likes,” clicking on ads, and making purchases following those clicks. This is a segment that is likely to buy or do more online as long as they believe there is a need to do so.

Most countries had similar rates of transactionals—except for China, whose population clearly prefers using the Internet to shop.

**Bricks, no clicks.** These consumers are relatively less connected and do few things online. They have a clear preference for stores and use smartphones sparingly. They know what they are doing and are most likely to be loyal to the shopping channels and destinations they are used to. They use the Internet, but certainly seem to have well-defined boundaries on what they want to do while online. Their brand engagement is relatively low on social networks and so is the influence of “likes” on their purchasing decisions. Similar to social animals, the conversion ratio of ad clicks to buys is low. This is a segment whose loyalty is probably yet to be tapped into effectively by brands through other channels.

The markets where physical retail is best developed had the highest number of bricks, no clicks consumers in our survey, particularly the United States, United Kingdom, Germany, and Japan.
Implications for International Retailers and Brands

For brand and retail executives, now is the time to stay even-keeled, and to remain true to your brand. You don’t have the stage anymore—you can tell your story and offer your product, but there are many more terabytes of data about your product that are created by people not in your marketing department. Social media is both wonderful and, at times, nasty. Can you deal with both? Can you embrace the notion that your brand is crowdsourced, and that your voice is just one of many?

Perhaps the sea change in marketing to the connected consumer is that you’re not communicating to some type—to the king and queen, or to mom and dad—but rather to an individual shopper who is connected to his or her network every hour of every day. Regardless of whether your brand message is about getting people to grab your products off shelves or click on “buy” on a website, the truth is that today’s consumers get their inspiration in an entirely different way than they did 10 or even five years ago.

A few crucial learnings stand out.

**Value can be created at every touch point.** Physical stores remain the foundation of retailing in most categories. Ninety percent of retail sales still occur in stores, and 95 percent are captured by retailers with a brick-and-mortar presence. Stores will continue to provide consumers with the sensory experience to touch and feel products, immerse in brand experiences, and engage with sales associates. In addition, connectivity does not mean that consumers do everything online, but rather that being connected offers access, speed, and greater choice. Stores will continue to make a significant contribution to converting the sale, even if transactions eventually happen online. Two-thirds of customers purchasing online say they use a physical store before or after a transaction.

The debate is not a question of digital versus physical. Successful retailers and brands understand how each customer touch point creates value for customers, and they develop omnichannel strategies that maximize customer value, satisfaction and profitability.

**Personalization is not a cliché anymore.** As consumers become more discerning—and over-advertised to—personalization has become regular part of digital marketing. Opt-in and geo-location are still developing, but most leading retailers (and CPG manufacturers) recognize and appreciate that 10 or 12 terabytes of data is something they can (or should be able to) handle. The consumer is just one person—complex and discerning and changing frequently—but he or she expects you to keep up while also maintaining carefully respected privacy.

**The role of brands and retailers has changed.** The need for connection, self-expression, exploration, and convenience have changed the roles brands and retailers play in their industries. Leading companies are addressing these needs by building communities, holding conversations, entertaining, and educating consumers. Where value is created in the shopping journey is very different from where it is captured.

- **Building communities.** The notion of community has done miracles for businesses both online and offline. From the cozy environment of Starbucks and the communal table at Le Pain Quotidien to the avid online communities of Burberry’s and Nike+, rallying consumers around a common interest, idea, or value gives them good reason to come back, engage, and advocate for a brand.

- **Holding two-way conversations.** To facilitate more self-expressive consumers, companies must have an ongoing conversation, be open to feedback, and take risks. Having a Facebook
page means allowing consumer sentiment, positive or negative, to be out there in the open. It also means that conversations need to take place at multiple levels of the organization, rendering the idea of “brand control” increasingly obsolete. This in turn requires all stakeholders across the extended organization to have a much stronger shared view on values, as the role of each “ambassador” will be much greater. The flip side of reduced brand control is increased engagement. Good conversations are provocative and open, and they ignite the creativity that ultimately enriches the community and the brand.

- **Educating and storytelling.** As for exploration and satisfying of curiosity, companies are increasingly assuming the role of educators and storytellers. From teaching consumers about their brands to “how-to” videos for cosmetics or food recipes, companies are developing new and interesting content to bring consumers back to their stores or websites. Storytelling and content creation and curation are among the most important business competencies of the future, and at its best they can create long-lasting loyalty.

In summary, **connected consumers are not created equal**—in their behaviors and motivations, in where they get their information, and in who influences their opinions. While they share many similarities across the world, there are profound differences from market to market, based on demographics, infrastructure, and social orientation.

This snapshot of the connected consumer reflects the dramatic global similarities as well as the striking local differences—important considerations as global brands and retailers try to keep pace.

### Authors

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Location</th>
<th>Email</th>
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<tbody>
<tr>
<td>Michael Moriarty</td>
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<td>Chicago</td>
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<td>Vishwa Chandra</td>
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### About the Global Consumer Institute

The A.T. Kearney Global Consumer Institute is a worldwide network of professionals and executives. The Institute combines proprietary and public data resources with local knowledge to deliver strategic and operational insights to executives in consumer-facing industries seeking long-term growth and competitive advantage. For more information, please contact gci@atkearney.com.
Appendix

The Connected Consumer Study was conducted in July 2014, and covered 10 countries with 10,000 evenly distributed respondents. We chose nine of the top 10 Internet-using nations in terms of number of Internet users—China, the United States, India, Japan, Brazil, Russia, Germany, Nigeria, and the United Kingdom—plus South Africa (25th globally) to purposefully over-represent the fast-developing African continent. The survey comprised 29 questions; four were customized for market-specific household incomes, education systems, popular social networks, and shopping websites.

The responses were census-representative in every country. Our age distribution focused on younger demographics, with 64 percent of respondents under 45 years old. We achieved an almost even split between men and women and have a census-appropriate representation of income groups in each market (see figure).

Figure
About the survey respondents

Source: A.T. Kearney analysis
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The signature of our namesake and founder, Andrew Thomas Kearney, on the cover of this document represents our pledge to live the values he instilled in our firm and uphold his commitment to ensuring “essential rightness” in all that we do.

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