Media Essentials by Aleph 2024

Your guide to media, advertising, and shopping in growth markets

Opening note

> The digital consumer is constantly evolving and as marketers, we must stay abreast of what's driving these changes and where these shifts are leading us.

To that end, we partnered with Appinio to understand how consumers in growth markets interact with media and advertising formats, and how that relationship shapes their purchasing behaviors at every stage of the funnel.

Now in its 4th edition, we expanded the Media Essentials report to cover 30 countries, with 23,400 respondents, including new markets like Cambodia, Kenya, Latvia and Peru.

We heard your requests for reliable local consumer research and analysis, so we packed this year's report with actionable media, advertising and shopping insights to help you plan and strategize for the upcoming year.

Despite rocketing internet adoption and digital media consumption, the spend on digital advertising continues to fall short compared to the level of usage (see Appendix A). I hope this report will help you seize the digital opportunities in front of you, and will inform your marketing strategies for the coming year and beyond.

Elyse Estrada

Global CMO at Aleph Group, Inc

How to use this report

This year's Global Media Essentials extends well beyond the pages of this report to offer you a complete view on media, advertising and shopping trends around the world.

We have taken a two-pronged approach this year. In the report you are reading now, we look at the macro (global and regional) trends and challenges.

Accompanying this report is the Aleph Media Essentials dashboard, an **interactive dashboard** where you can explore, navigate, compare, analyze, and visualize data and findings on media consumption, advertising and consumer behaviors. Come dive into 30 country-specific dashboards where you can zero in on the markets that matter most to you, from Bangladesh to Kazakhstan or Serbia to Mexico.
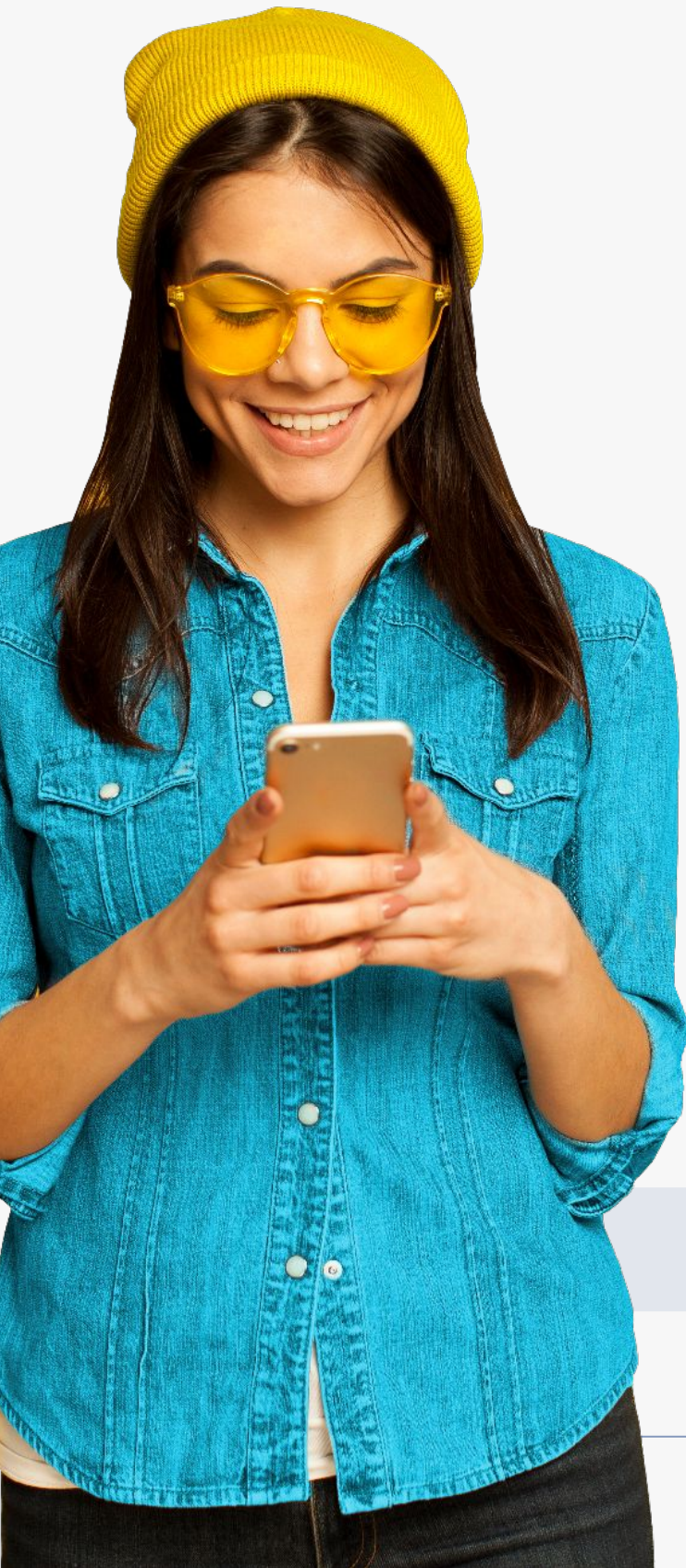
Happy globe-trotting through our data!
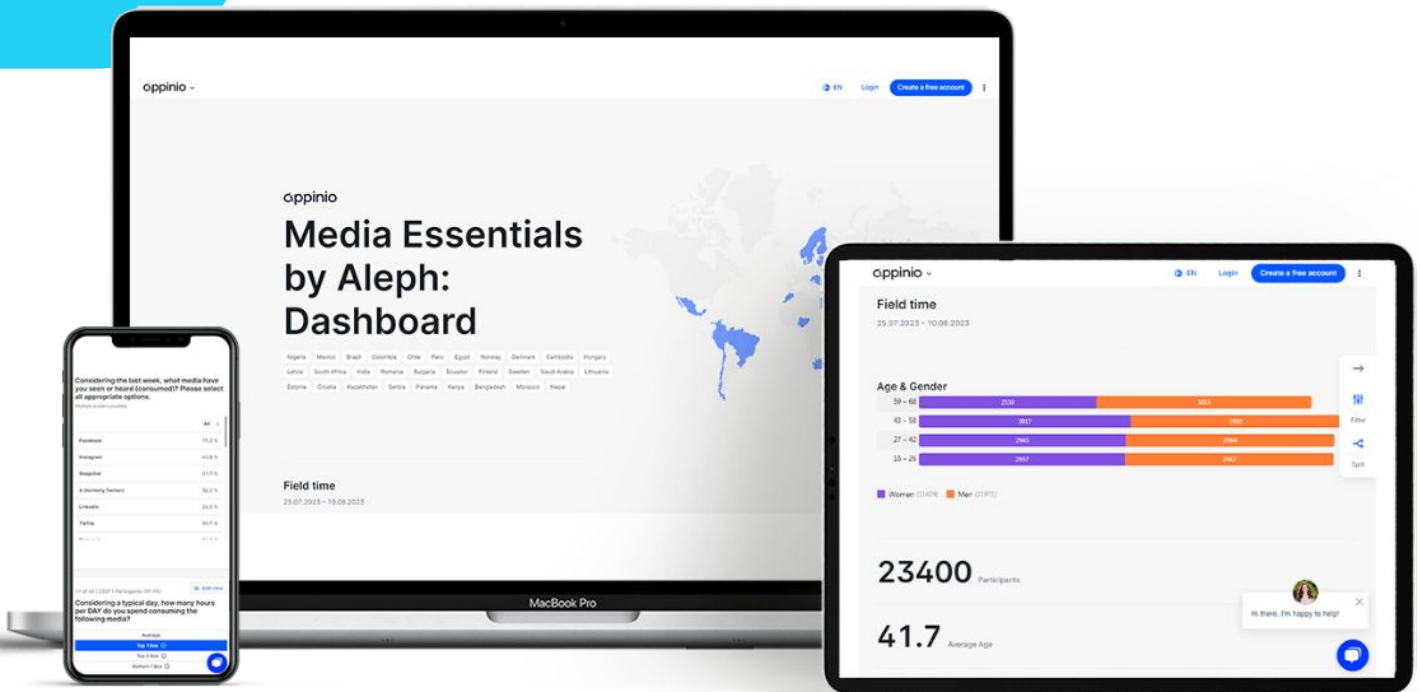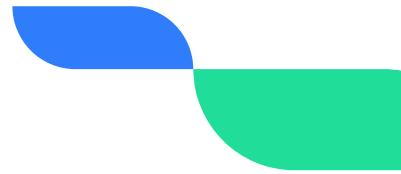
**Click to open
Interactive dashboard**

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Executive summary

Media, advertising, and shopping trends have undergone a complete makeover in recent years, largely influenced by evolving technology, consumer behaviors, and global events. *'Media Essentials by Aleph: Your Guide to Media, Advertising, and Shopping in Growth Markets'* puts these trends under a magnifying glass to help marketers everywhere, especially in high-growth markets, examine, analyze and strategize for the next six to 12 months.

No slowing down - digital media's persistent growth:

The number of digital consumers has been growing year on year - a trend that is only expected to accelerate. Irrespective of where people live in the world, media consumption patterns are remarkably consistent, with **YouTube, Facebook, Google Search, Instagram, and TikTok emerging as global favorites,** followed by Pay TV and OTT platforms. Innumerable little shifts across the landscape have collectively reshaped media habits globally: **Spotify has overtaken Radio, Linear TV is neck-to-neck with Twitch among Gen Zs, and Baby Boomers and Gen Xs are consuming**

2.6-2.9x

more Online Videos than traditional Linear TV.

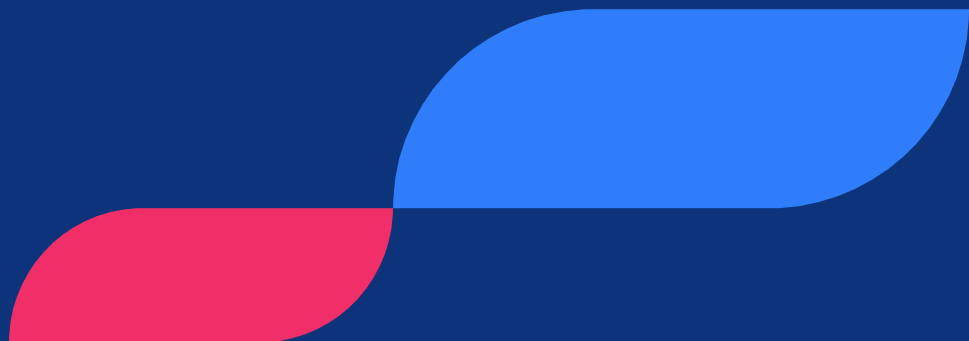Furthermore, **Social Media usage is**

2x

and Online Video usage is

1.5x

that of TV during prime time (5 to 9 pm), reiterating that **digital media should be the first investment for marketers** who want to reach new audiences, improve customer experiences, formulate more targeted marketing strategies, and unlock more revenue.

Customer profiles - power tools in the marketing tool box:

Our research uncovered six consumer profiles that brands can lean on to guide their marketing strategies: **The Needs-based, Price-Sensitive, Premium Shopper, Early Adopter, Conscious Consumer, and Loyalist.** Non-mutually exclusive, these profiles can help brands make strategic decisions about where to launch or expand their products globally, what to emphasize in their communications, or which media platforms to deploy in their campaigns, among other dimensions.

More than half of the world's consumers identify primarily as Needs-based and another half as Price-sensitive, regardless of their geographical location.

Beyond the two biggest categories, other consumer profiles feature more prominently in specific regions: Premium Consumers are more prevalent in Asia, Early Adopters in MENA, Conscious Consumers in Africa, and Loyalists are more typically found in Central Europe.

Each consumer profile consists of a unique set of traits and behaviors that play out differently. For instance, **Early Adopters' have a bias for influencer opinions and Premium Shoppers' rely more on expert and professional opinions** to help inform their purchasing decisions. To reach a specific profile, marketers should select marketing channels based on each profile's media affinities. Surprisingly, **it's much more likely to find an Early Adopter on Snapchat and Spotify than other profiles while LinkedIn is the favored platform by Conscious Consumers and Loyalists.**

And even though Instagram, 𝕏 (formerly Twitter), and TikTok find themselves with neither highest or lowest affinity, they sit consistently towards the middle representing a good option for marketers to reach all six profile groups.

Social Media, Online Video pre-rolls, TV, and Search Engines are consistently effective at reaching all consumer profiles across the entire purchasing funnel, and marketers should keep them in mind as they lay out their marketing approach.

Retail's revolution - even when they're in-store, they're still online

Nowadays,

5 in 10

consumers make at least half of their purchases online, while only

1 in 10 shop

exclusively in physical stores.

Asia, MENA and the Nordics are at the helm of this shift from traditional to online shopping.
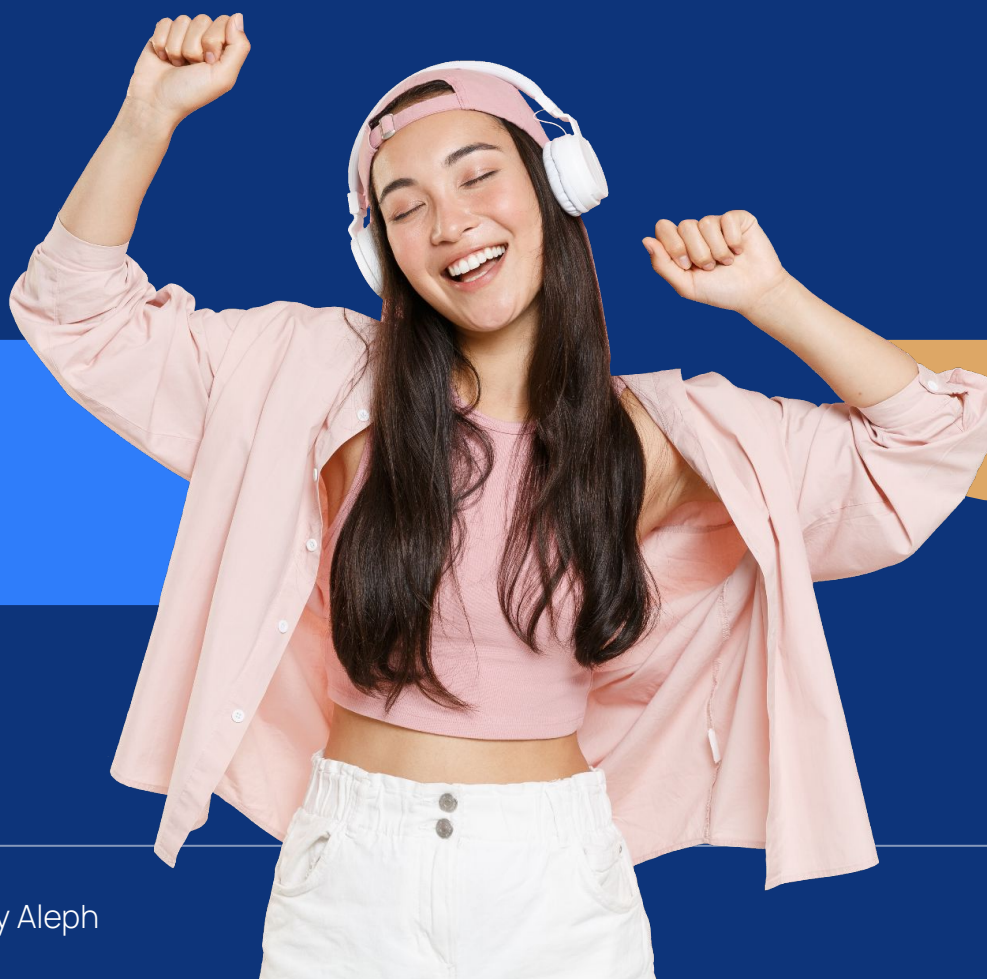
While people are in-store,

76%

reach for their phones to research or inquire about a product, and

30%

opt to buy a product online despite standing in the physical store.

This omnichannel path to purchase has resulted in a complex web of touchpoints - one that requires brands to rethink and continuously upgrade the shopping experience.

To meet customers wherever they are on the shopping journey, brands should continuously optimize the online retail experience and enhance their digital assets in-store. To do this, they can take cue from the factors that best encourage or discourage online shopping in each region: **competitive pricing is a priority worldwide, free delivery is a major incentive in the Nordics, LatAm, and the Balkans,** while prompt deliveries are more valued in Africa and LatAm.

Contrarily, **the biggest hurdles to shopping online include shipping delays across all regions, distrust in Africa, LatAm, the Nordics, CE, and the Balkans, and a lack of guarantees in LatAm and MENA.**
Brands also should consider consumer preferences towards payment methods as another important factor when wanting to deliver a seamless online shopping experience. To attract new and returning customers and drive more sales marketers should tap into the consumer shopping easons - building anticipation and delivering a seamless shopping experience. Brands that lean into what customers want and address what's holding them back are more likely to win hearts - and share of wallet.

Key to any improvement of services, features, or products is that it is communicated clearly and regularly to customers. Fortunately, **digital media, especially Social Media, has proven to be highly effective at influencing purchases,** whether speaking to Heavy Online Shoppers (who conduct over 75% of their purchases online) or Heavy in-store Shoppers (who buy 75% or more in physical stores). This makes digital media the ideal choice for marketers to reach out and engage with new and existing customers.

As you chart your course for the near to medium-term, bear in mind that **continuous adaption of your communication strategies and channels is key.** The strength of digital media lies in its flexibility and agility to keep marketers atop of today's ever-changing advertising landscape.

Methodology

The *Media Essentials by Aleph* research was conducted from July 24th to August 9th, 2023 in collaboration with Appinio. Surveying 23,400 respondents, the survey spanned 30 countries with the following breakdown:

Africa

Kenya		1,000
Nigeria		1,000
South Africa		1,000

Baltics

Estonia		800
Latvia		800
Lithuania		800

MENA

Egypt		1,000
Morocco		800
Saudi Arabia		1,000

Asia

India		1,000
Bangladesh		1,000
Cambodia		700
Nepal		500

Central Asia

Kazakhstan		800

Central Europe

Hungary		800

Nordics

Denmark		250
Finland		250
Norway		250
Sweden		250

Balkans

Bulgaria		800
Croatia		800
Romania		800
Serbia		800

Latam

Brazil		1,000
Chile		800
Colombia		1,000
Ecuador		800
Mexico		1,000
Panama		800
Peru		800

- Gen Z, or Centennials, comprising individuals between 16 and 26 years old.
- Gen Y, or Millennials, comprising individuals between 27 and 42 years old.
- Gen X, comprising individuals between 43 and 58 years old.
- Baby Boomers, comprising individuals between 59 and 68 years old.

Unless stated otherwise, all information is sourced from '**Media Essentials by Aleph**: Your guide to media, advertising, and shopping in growth markets'.
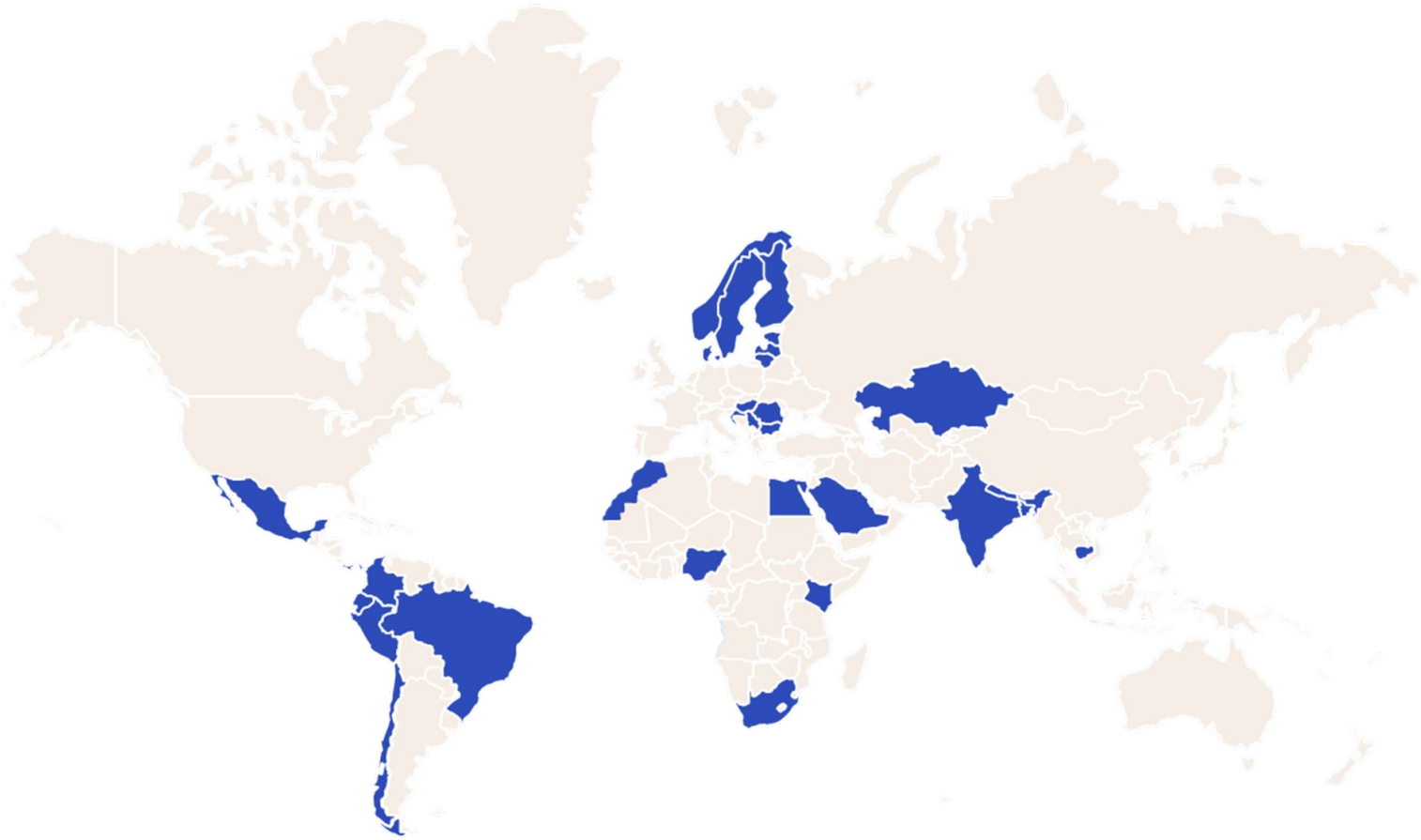
Online panel as proxy for internet penetration

Online panels have proven to be a good proxy for internet penetration, which is the approach we have adopted in this research. According to a report by the Economist Intelligence Unit, **digital penetration** in the countries we surveyed **averages to 77% of the population**[1].

While countries like **Bangladesh have 40%** penetration, others like **Kazakhstan have 90%**, indicating that even if a country currently has lower participation in the internet economy, that will soon change and their people will assume digital behaviors in due time.

To account for variations in sample size between countries, the internet connection rate was adjusted based on the survey sample. As a result, **about 60% of the population** in surveyed countries **has internet access** and is therefore eligible to participate in this study.

[1] Economist Intelligence Unit

Chapter 1

Digital media consumption is booming
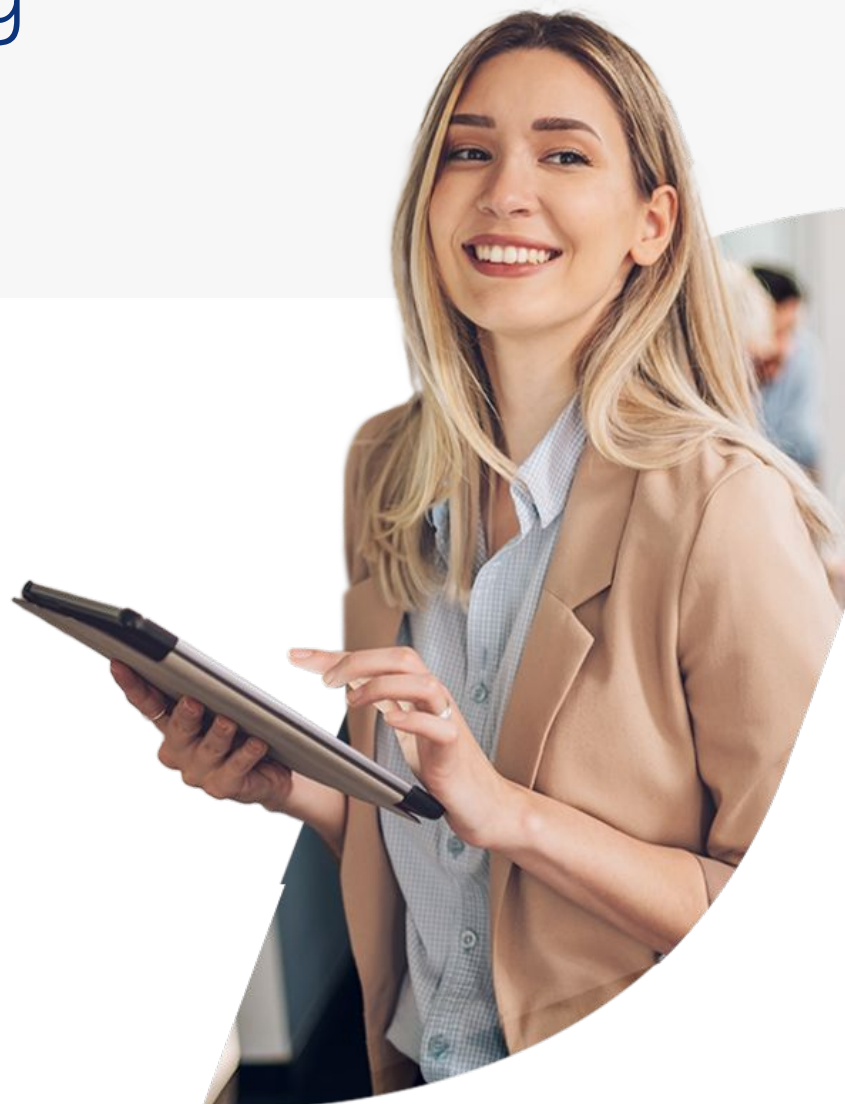
Over the years, the global media landscape has evolved substantially, shifting from traditional platforms like newspapers, radio, and television to digital channels such as social media and streaming services. Traditional media, though still consumed, has declined in reach as digital consumption continued to rise.

The role of digital media is best illustrated by the growth in social media usage from

3 billion

users in 2018 to

5 billion

today, and its expected trajectory to reach

6.5 billion

by 2027.

Traditional TV growth pales in comparison, increasing from

5 billion users

in 2018 to slightly over

5.5 billion

in 2027.

While both have expanded, the sizable jump in social media users underscores a rapidly-growing preference for digital platforms.

Number of users worldwide

— Social media   — Traditional TV & home video

Billions of people

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 |
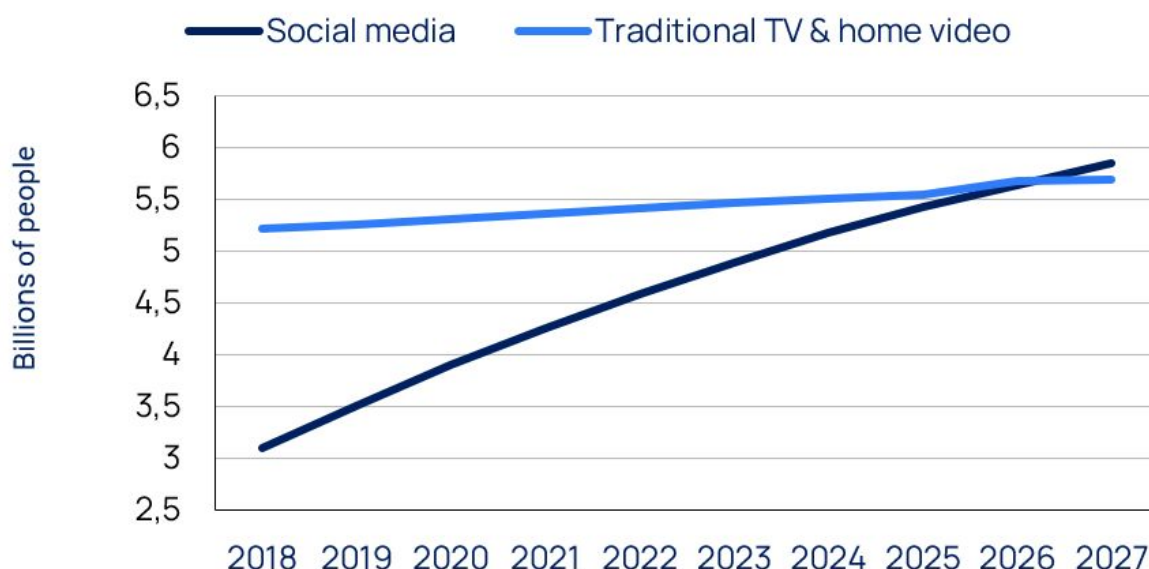
Source: Statista, worldwide figures. 2018-2022.

Our research confirms a consumer preference for digital media across the globe, **as indicated by the Global media consumption map, which shows that digital media dominates in both reach and time spent.** In particular YouTube, Facebook, Instagram, and TikTok not only have high reach but also garner the most time spent. Following these are Cable TV (or Pay TV in some regions) and

OTT (over-the-top content streaming platforms), which command a significant amount of user time, but only reach about 40% of audiences. Interestingly, Spotify has surpassed radio in popularity and linear TV (or broadcast TV in some countries) commands about as much time spent as Twitch, though TV still accesses a marginally larger reach.

Global media consumption map

Time (% of people watching 3+ hours per day)
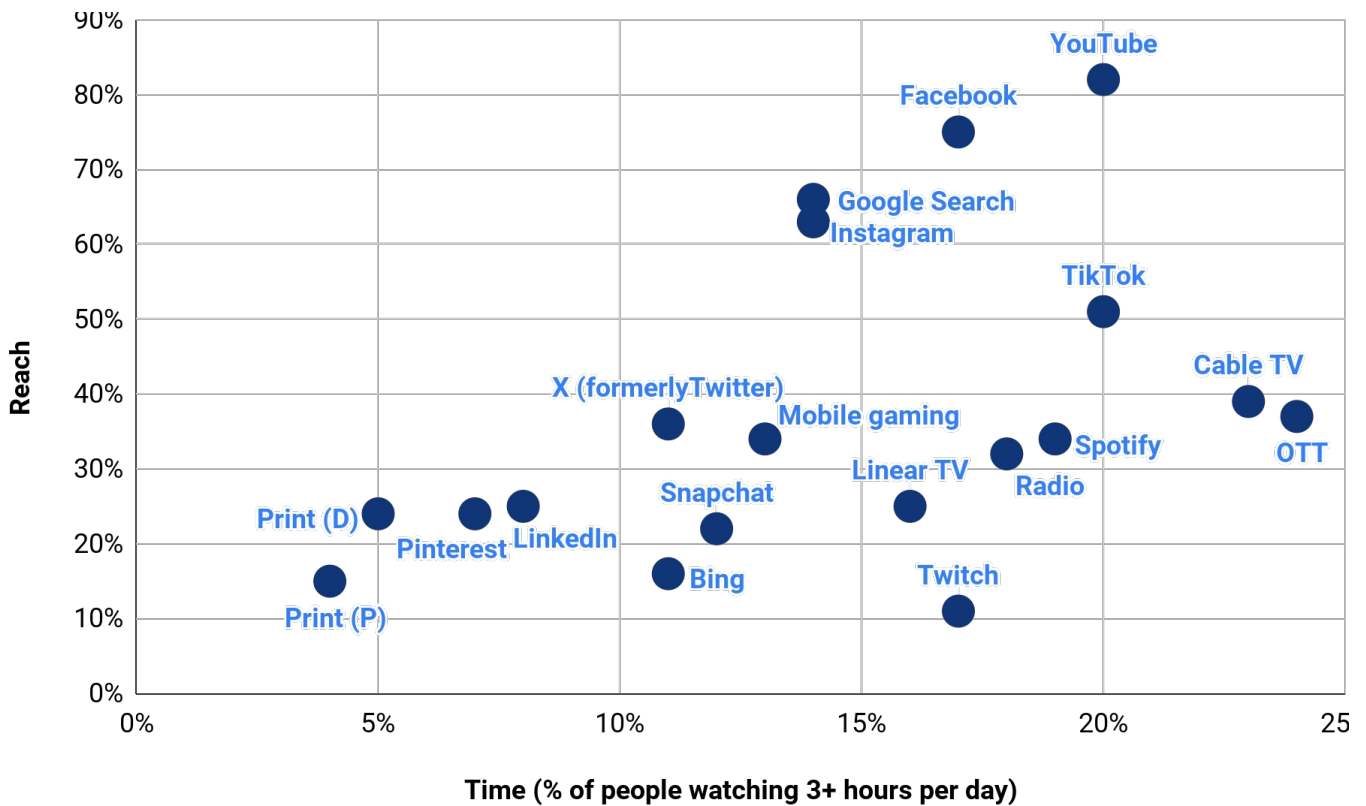
Source: Media Essentials by Aleph 2024. N=23.400

This chapter dives into the trends and implications of today's media consumption, the stages in every market's digitalisation journey, and most interestingly, the similar behaviors exhibited in each of these phases, regardless of where people live or how developed the market.

Despite different cultures and digital infrastructures across the 30 markets in our study (the majority of them developing nations), digital media consumption patterns - e.g. platform penetration rates, time spent on each media, and the rankings of preferred media - are region agnostic. In short, digital consumption, including preferred media *and* time spent, is consistent across the board. Where regional differences in digital media consumption do exist, the differences are typically smaller compared to traditional media, suggesting that time spent on digital media usage tends to be similar across regions.

> Every market has different contexts and constraints, but the preferred media and time spent on each is similar.

Our data also shows that five key media are consistently at the top of the list across most regions: YouTube, Facebook, Google Search, Instagram, and Tiktok, making them the most popular media in the world. Even regions with slower digital adoption still follow a similar path to digitalization, albeit at a different pace. And despite being heavily influenced by their unique economic, social, educational, and commercial contexts, these markets will increasingly align with global consumption patterns over time.

Media consumption, by reach

Legend:
- YouTube
- Facebook
- Google Search
- Instagram
- X (formerly Twitter)
- Radio
- LinkedIn
- Cable TV
- OTT platforms
- Snapchat
- Mobile gaming
- OOH
- Bing
- TikTok
- Linear TV
- Spotify
- Press or Magazines (digital)
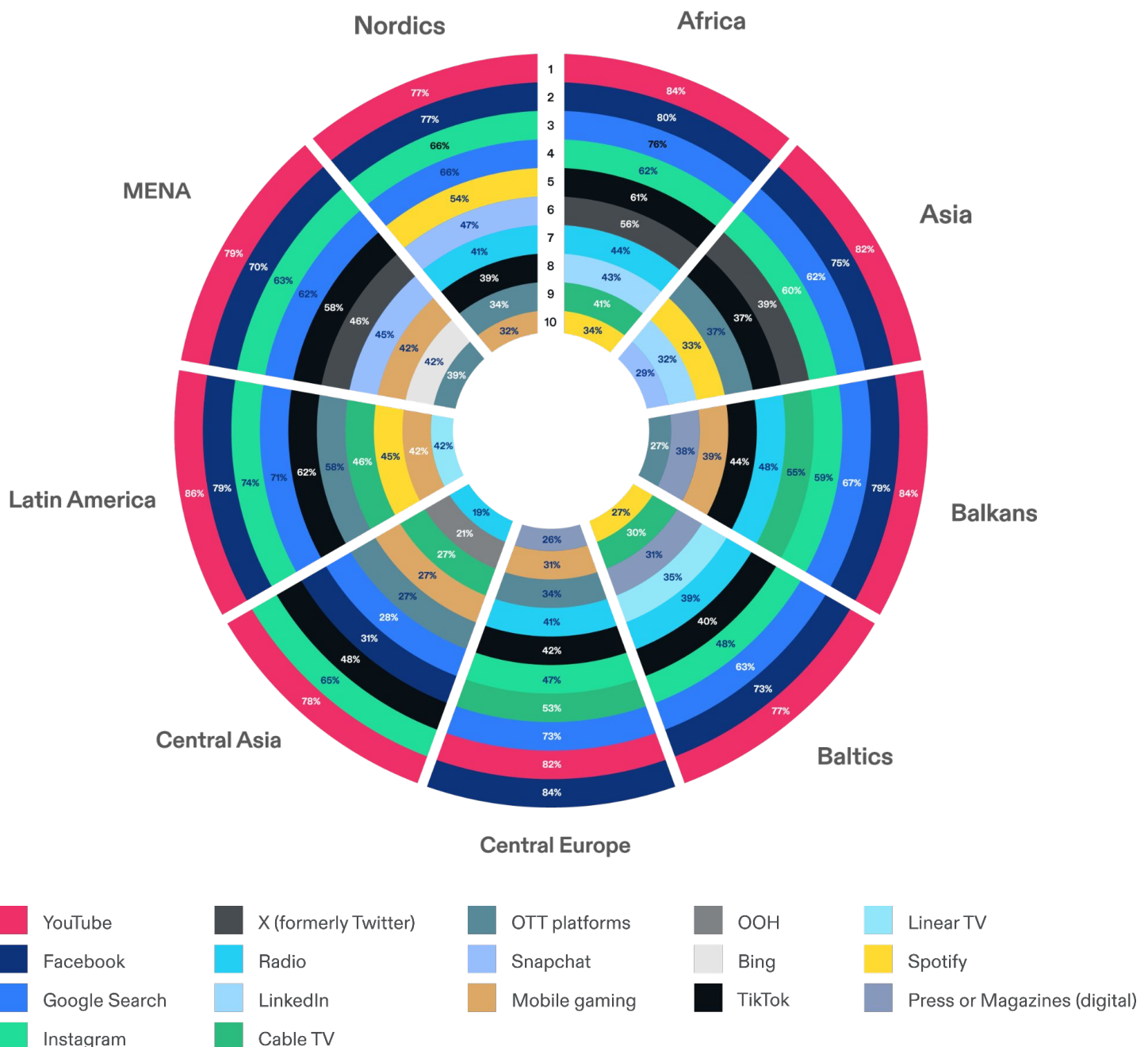
Ask Aleph:

Digital ad spend to rocket for years to come

Despite rocketing digital media consumption, ad spends on digital media remains a significant 27 percentage points lower in emerging markets than in developed regions[2,3], signifying a sizable untapped opportunity for brands to win customers' attentions - and hearts - via digital platforms.

To illustrate this, look at the rapidly changing media consumption landscape in Africa. Instagram, for example, is extremely popular in Nigeria.
A remarkable

68%

of Nigerians today use Instagram
- 10 percentage points higher than South Africa - and a large enough user base to bump up Africa's overall average.

𝕏 (formerly Twitter) is another platform that garners significant attention in the region, especially in Kenya and Nigeria where usage rates exceed the global average by more than

70%

And with Africans' increased propensity for digital media, digital advertising spend is predicted to increase by

67% by 2026[4].

The share of ad spend allocated to digital media is expected to shift by 10 percentage points, **boosting the share to digital media from**

43% in 2023 to
53% by 2026.

Marketers who embrace this shift will emerge as the long-term winners.

[2] Insider Intelligence/ eMarketer: Digital ad spending by country

[3] Statista: Market Insights

[4] Insider Intelligence/ eMarketer: Digital ad spending by country

Aleph Expert
Stephen Newton
Managing Director Sub-saharan Africa at Aleph Group, Inc weighs in.

1.1 Understanding media consumption to deliver the best marketing results

By media type

In today's rapidly evolving landscape, digital media consumption has become the new normal. This is best exemplified by the **world's five most popular media platforms:**

- ▶ **82%**
- f **75%**
- G **66%**
- ⊙ **63%**
- ♪ **51%**

all being digital and reaching the mass majority of users across all 30 markets surveyed. Not only are these platforms popular and cross-generational, they also appeal to all consumer profiles (more in Chapter 2), making them ubiquitous around the globe.

Next in popularity are:
Cable TV **39%**
and over-the-top platforms
OTT **37%**
platforms like Netflix, Amazon Prime, and Disney+, which reach about four in ten respondents and are mainly used to watch medium to long-form entertainment content.
𝕏 (formerly Twitter) **36%**
Spotify **34%**
and
Mobile gaming apps **34%**
follow, each reaching a little over three in ten people and are consumed for specific purposes, such as to stay current on events or to listen to music.
Noteworthy is that digital channels offer higher reach than traditional media, such as radio (32%), and Linear TV (25%).

Media Consumption Worldwide

Digital media ■ **Traditional media** ■

Platform	Value
YouTube	82%
Facebook	75%
Google Search	66%
Instagram	63%
TikTok	51%
Cable TV	39%
OTT content platforms	37%
X (Formerly Twitter)	36%
Spotify	34%
Mobile gaming	34%
Radio (Traditional or	32%
Linear TV	25%
LinkedIn	25%
Press or Mags (digital)	24%
Pinterest	24%
Snapchat	22%
Cinema	21%
OOH	21%
Bing	16%
Press or Mags (paper)	15%
Other Audio Streaming	14%
Twitch	11%
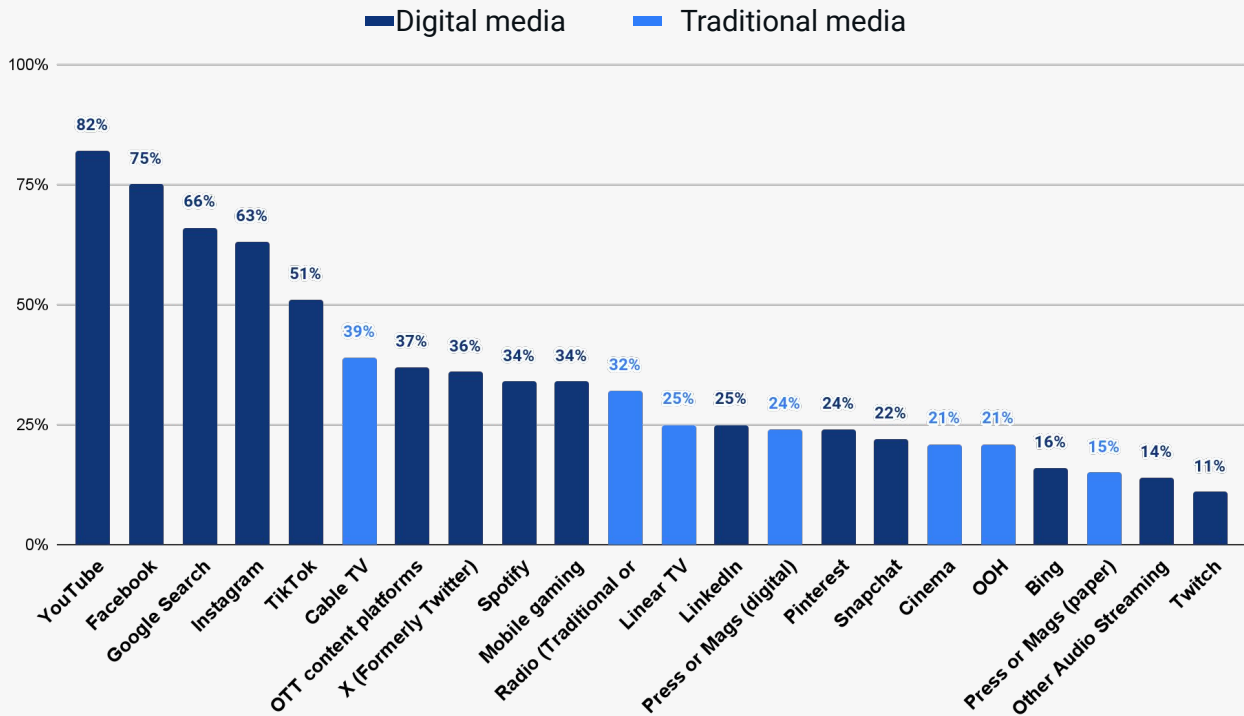
Aleph Global Media Essentials 2024: N=23400, OOH=Advertising on public spaces or transport.
Question: Considering the last week, what media have you seen or heard (consumed)?

Marketers should, however, bear in mind that some media platforms may not have widespread reach at the 16+ years old population level, but still excel in connecting with specific audience segments. Their value lies in their ability to effectively reach, influence and engage these specific segments. For example, **Spotify and Snapchat are used by 45% and 36% of Generation Z respectively, despite reaching only 34% and 22% of the total population,** making the affinity with younger audiences worthy of consideration when planning a campaign that speaks to young audiences - a concept we explore further in the next section.

Mass reach isn't everything.

We must consider age affinity, time spent, and usage during periods of the day, too.

Affinity with Gen Z +31%

Affinity with Gen Z +61%

Media Consumption

Legend:
- Gen Z
- Gen Y
- Gen X
- Boomers
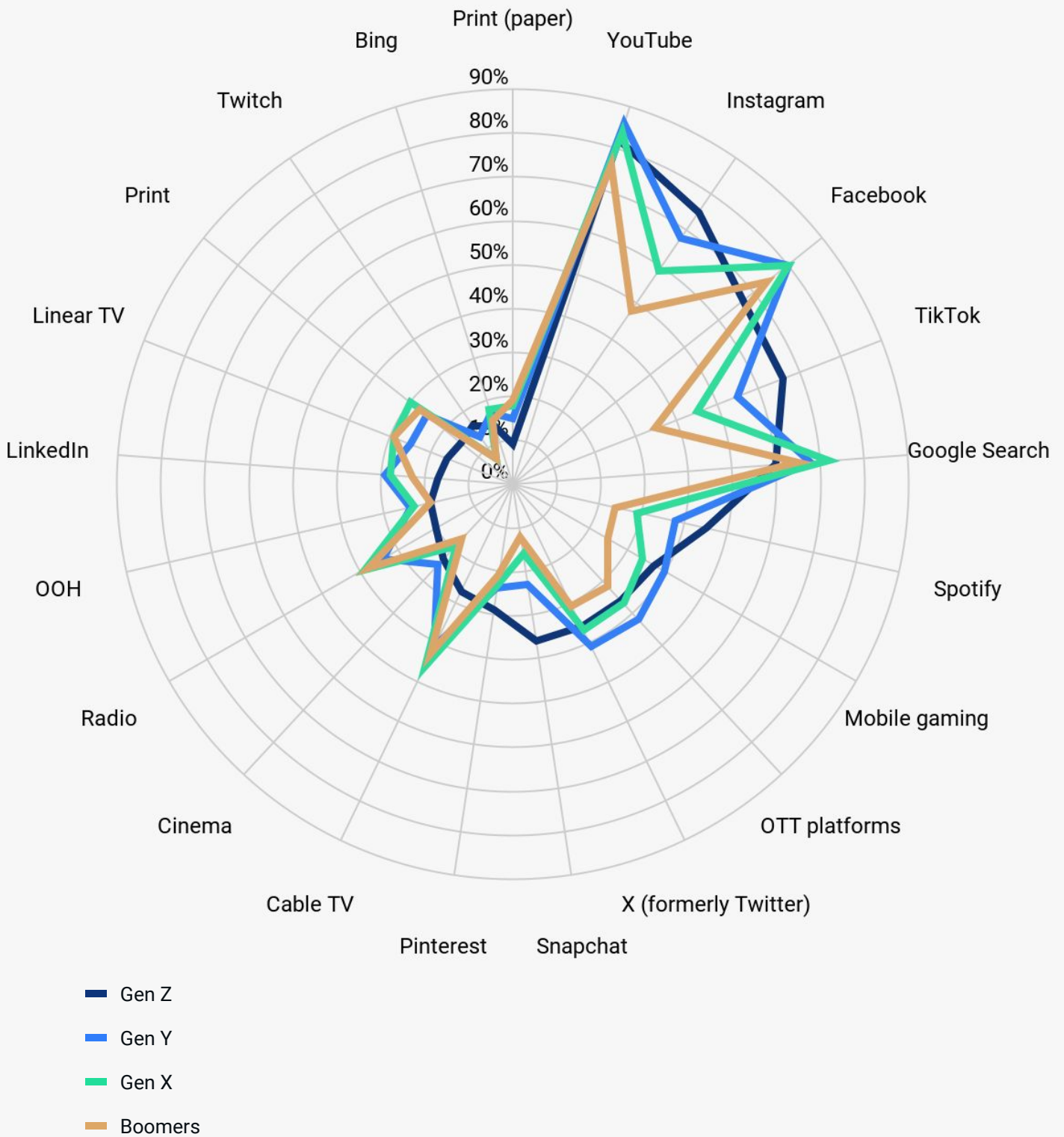
Aleph Global Media Essentials 2024:
All N=23400, Gen Z - Centennials (N=5.869), Gen Y - Millennials
(N=5.900), Gen X (N=5.989), Boomers (N=5.567)

By generation

Digitalization has taken place across generations. This is clearly demonstrated by two quintessential audiovisual channels: online video and broadcast TV. Interestingly, Gen Z watches about half as much TV as Gen X and Baby Boomers, indicating a shift in consumption patterns.

Having grown up watching TV, Gen X stands at the crossroads of this shift and consumes a significant amount of pay TV, but also watches quite a bit of YouTube (similar to the habits of their Gen Y and Gen Z counterparts). In short, Gen X`s are the pivotal generation that transitioned viewers from traditional to digital media consumption.

Gen X and Boomers consume

2.9x and 2.6x

more Online Videos than Linear TV (Broadcast TV)

This indicates that contrary to popular belief, **digital media reaches all age groups and offers advertisers greater reach and effectiveness than traditional media, including among Gen X and Boomers.**

When dissecting consumer media habits, it's important that marketers examine the unique consumption behaviors that characterize each generation and explore factors beyond reach to understand how different generations engage with each media platform. Media consumed by Gen Z, for example, tends to feature more interactions and engagement, socializing, observing others' activities, and listening to music.

This generation favors:

+61% more than the average

+43%

+31%

+30%

+23%

+18%

When it comes to **Gen Y**, many of whom are climbing to the heights of their careers, prefer work and entertainment-related media. LinkedIn, for instance, has an +18% higher affinity compared to the rest of the 16+ population. This is closely followed by Mobile Gaming apps (+16%) - which reflect the generation's penchant for on-the-go entertainment - then Twitch, 𝕏 (formerly Twitter), and Spotify, with +14%, +13%, and +12%, respectively.

Media consumed by mature audiences, i.e. **Gen X** and **Baby Boomers**, on the other hand, tend to be largely unidirectional and related to information and news. While these consumer profiles still engage a lot with digital media they index higher on traditional media like Pay TV (+17% more than the average), Radio (+20%), Linear TV (+17%), and Print (+23%).

As a result, different media consumption patterns among different age groups require targeted communication strategies. The unidirectional nature of traditional media that's favored by older audiences, for example, lends well to more informative or directive messaging. In contrast, younger audiences tend to gravitate towards more interactive platforms like Twitch, Snapchat and Instagram, which invite two-way interactions, such as seeking advice, catching up with friends or engaging with content creators. Brands must be clear on who they want to speak to, identify the channels to reach them on, and adapt their strategies accordingly.

Style stalwart Carolina Herrera's appeal to Gen Z

In partnership with Aleph, fashion powerhouse **Carolina Herrera** took to Twitch to promote their new perfume to Gen Zs - an audience that the classical brand hadn't engaged with much before. Through streamers[5] from Mexico, Brazil, Chile, and Argentina, they designed a game and rolled out an unboxing campaign with the aim of lifting brand recall and engagement. For the first time, Twitch extensions[6] were used to create an interactive game where streamers could showcase their unboxing of the product and invite more viewers to do the same.

Reaching over

1.8 million live viewers,

the Herrera team successfully engaged their desired audience.
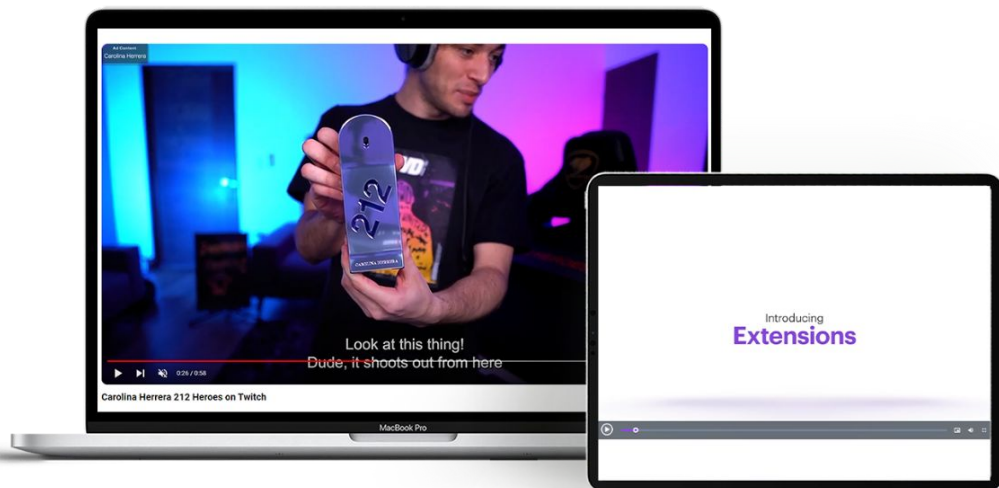
[5] Twitch streamers 'broadcast' their gameplay or activity by streaming directly from their screen so fans and subscribers can hear and watch them play live.

[6] Extensions: A Revolution in Live Streaming

L'Oreal turns to Snapchat to reach younger customers

Success isn't defined solely by reach. It comprises a combination of several dimensions and can be defined differently, depending on whom you're speaking to and what matters most to them. **L'Oreal** in Croatia, Slovenia, Bulgaria, and Serbia, for instance, wanted to market its CeraVe® brand to Gen Z's and Gen Y's. Knowing that Snapchat can help them tap into the desired audience set, they partnered with Aleph to leverage Augmented Reality (AR) on Snapchat to help demonstrate how the cleanser improves the skin.

The fact that the campaign reached over 900,000 Gen Zs and Gen Ys in the four countries was great, but the engagement metrics were what truly signaled the campaign's success:

users shared the AR lens over

25,000 times,

saved the product nearly

4,000 times,

and spent a staggering average of 71 seconds on CeraVe's® AR lens, surpassing benchmarks by 545%.

By time of day

Also playing heavily into how people engage with digital media is when they're tuning in - and why. Major social networks, including Facebook, Instagram, Snapchat, 𝕏 (formerly Twitter), TikTok, LinkedIn, and Pinterest, maintain a steady user engagement rate of 60% throughout the day, from 6 am all the way to 9 pm, and engage over half the users till midnight. This uninterrupted window for interaction emphasizes the reliability of social media media as a way to reach vast audiences throughout the day.

Consumers also engage heavily on online video platforms (i.e. YouTube and Twitch) throughout the day - with users hopping on from 9 am and remaining active till 9 pm. This offers brands a great opportunity to engage with consumers throughout the day. Traditional media pales in comparison, with broadcast TV peeking from 5 to 9 pm and radio and print media rising in the morning, but waning by noon.

Media consumption in a typical day

	6AM-9AM	9AM-12PM	12PM-5PM	5PM-9PM	9PM-12AM	12AM-6AM
SOCIAL NETWORK	62%	62%	61%	60%	51%	29%
ONLINE VIDEOS	34%	40%	44%	47%	39%	22%
TV (lineal or cable)	19%	17%	19%	32%	22%	9%
RADIO	19%	14%	13%	8%	5%	4%
AUDIO STREAMING	15%	16%	17%	15%	13%	9%
PRESS/ MAGS	13%	11%	10%	8%	5%	4%
GAMING	11%	13%	17%	21%	16%	8%
OTT Plataforms	9%	11%	15%	24%	22%	10%
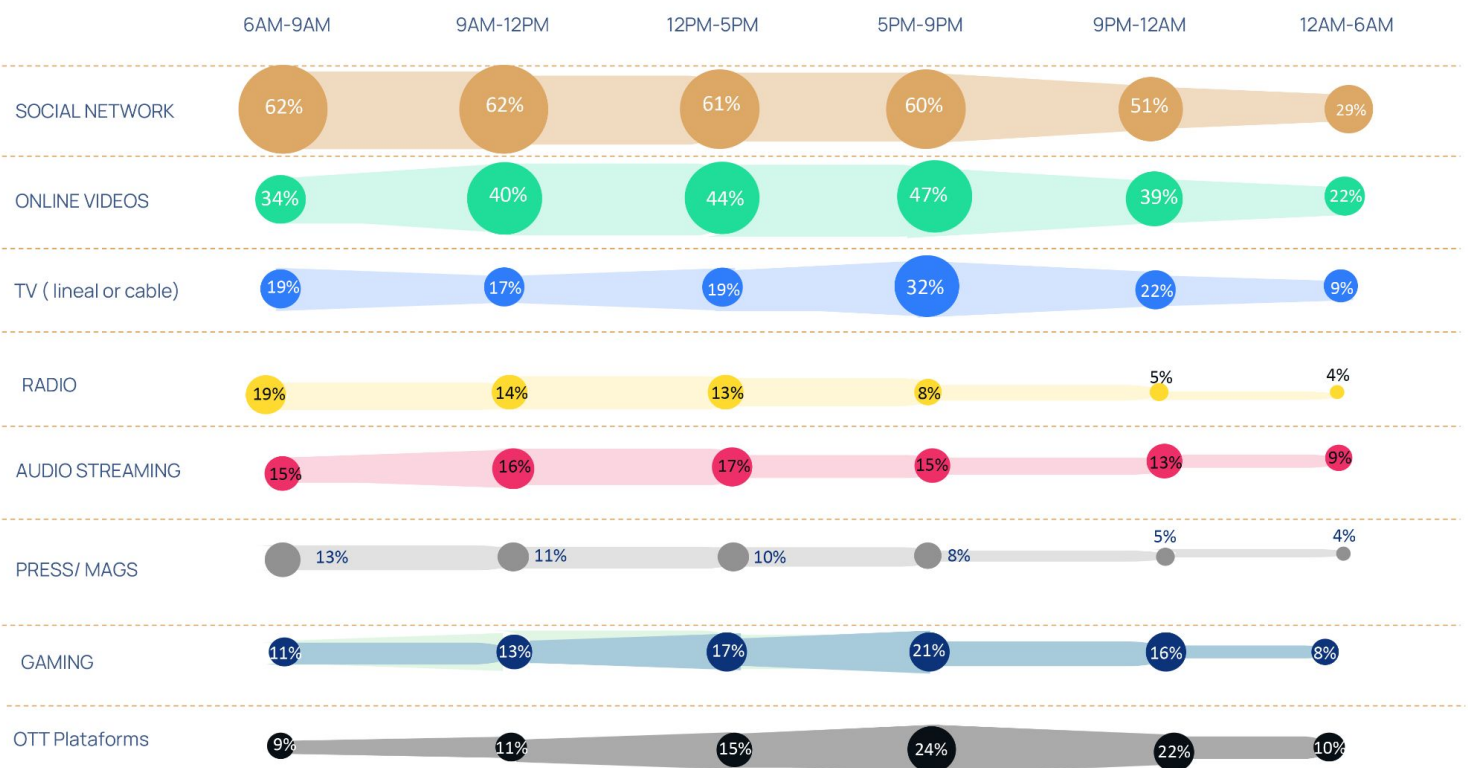
Source: Aleph Global Media Essential 2024. N= 23.400

Our research also shows that **social media usage is double that of TV, even during prime time (5 to 9 pm). At the same time online Video platforms usage is 50% greater in the same period.**
This reiterates the effectiveness of digital; not only is the window for engagement much wider, engagement is also much deeper.
Another phenomenon that marketers need to consider as part of their media strategy is multi-screening - the simultaneous use of mobile devices to browse social networks, search for information, or watch online videos while watching TV.

Multi-screening has made it harder than ever to capture consumers' attention and requires ad placements across a variety of channels in order to bridge the parallel activities,and requires marketers to plan ad placements across a variety of channels to bridge the parallel activities. This can including using QR codes on Snapchat, phone activations during ads on Spotify, or Moment Marketing with Real-Time TV Trigger via 𝕏 (formerly Twitter), among others.

Superbet builds a drumbeat of touchpoints across the day

Online games platform Superbet turned to Aleph and 𝕏 (formerly Twitter) with the aim of introducing its services to new users in Poland. To maximize reach and engagement across different times of the day, the Superbet team lined up several events during the 2023 IHF Handball Championship, including inviting handball fans to watch the elimination games before the big matches, providing real-time updates during the games, and offering fans behind-the-scenes content. Superbet used a variety of formats, including emojis, website cards, carousels to boost engagement, and Website Optimization Conversions to enhance reach and targeting at specific times of the day (i.e. at game time).
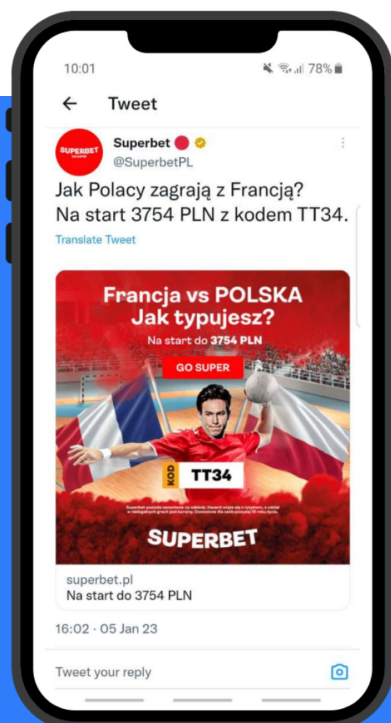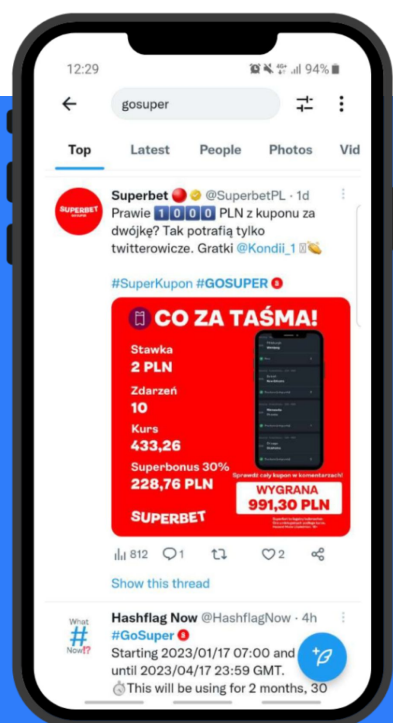
This multi-pronged campaign delivered a

3.47%

jump in engagement rate and a high

0.21%

click-through rate.

By time spent

While reach is often the starting point for media selection, marketers also need to factor in other metrics if they want to craft the most effective media plan and actively engage their target audience. Time spent is a good example. A brand who focuses on Gen Z might consider using Mobile Gaming Apps and Tiktok as the primary channels in their next campaign, since

47%

of Gen Z´s who play mobile games tend to spend over three hours a day on the activity. Similarly, TikTok also holds 30% of GenZ´s for over three hours a day - longer than the time they spend watching long-form OTTs like Netflix, Amazon Prime Video, or Disney+.

Interestingly, Spotify ranks 9th in reach across all respondents, but 6th in time spent. And while Gen Xs listen to Spotify the least among all groups, there are still 13% of them who spend three or more hours daily on the platform.

As expected, the younger the audience, the more likely they are to consume Spotify content, with

25%

of Gen Z´s spending over three hours a day on the platform.

Media with the least time spent are print newspapers and magazines, where people tend to spend less than 30 minutes a day. Across all age groups, consumption of these channels are sliding, with only three in 100 reading print materials for an hour or more a day. This makes digital media significantly more appealing when trying to increase reach, among any age group, and anywhere in the world.

Time spent by generation

(% of people using each 3+ hours per day)

Gen Z
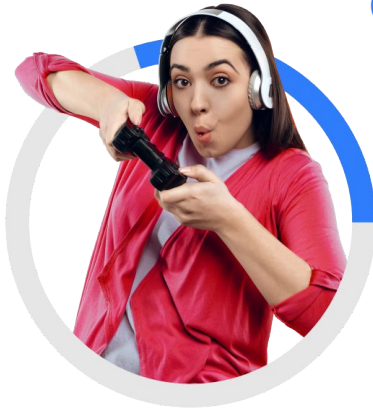
Gaming on PC or console 30%
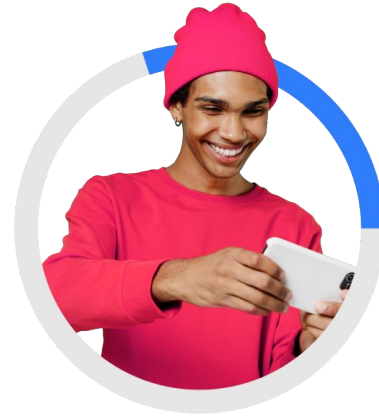
TikTok 30%

OTT content platforms 29%

Spotify 25%

The rest of the media:

Platform	
YouTube	
Instagram	
Facebook	
Linear TV	
Mobile gaming	
Twitch	
Lineal TV Channels	
Google Search	
Radio (Trad. or Online)	
Snapchat	
Bing	
X (Formerly Twitter)	
LinkedIn	
Press or Mags (digital)	
Pinterest	
Press or Mags (paper)	

0%   5%   10%   15%   20%   25%
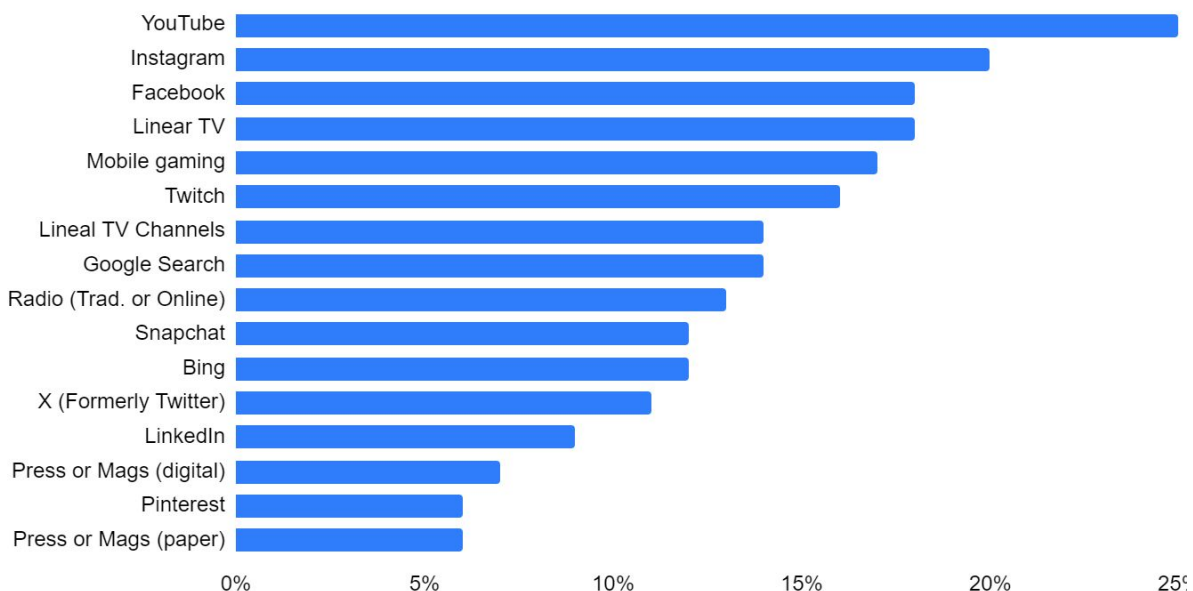
Source: Aleph Global Media Essential 2024. N= 5.899

Time spent by generation
(% of people using each 3+ hours per day)

Gen Y

OTT content platforms 26%
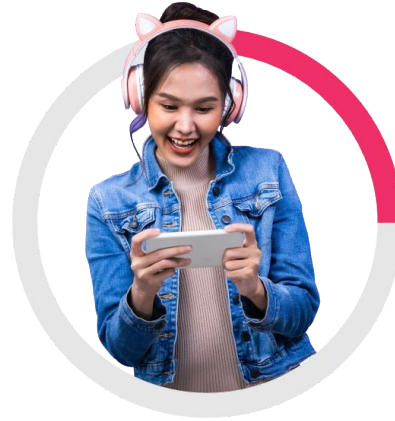
YouTube 24%
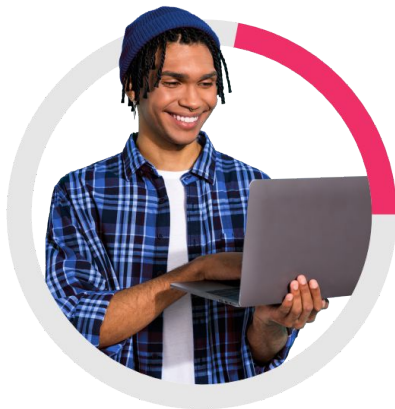
Cable TV 22%
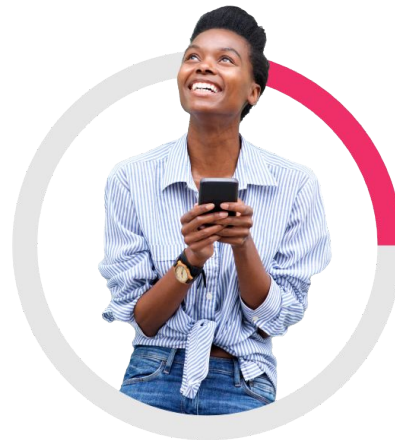
Facebook 21%

The rest of the media:
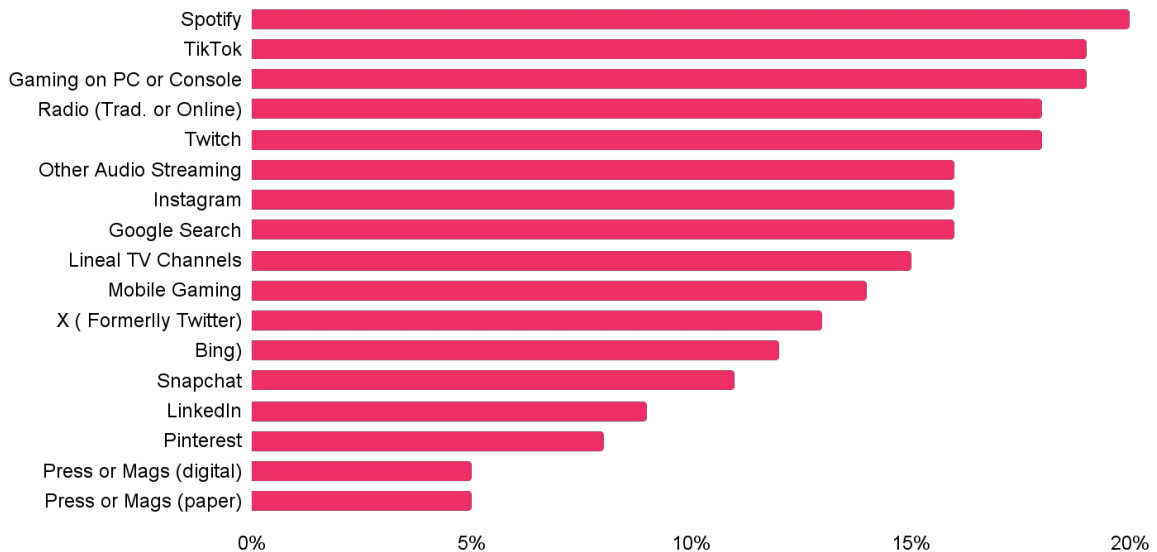
Media	%
Spotify	~20%
TikTok	~19%
Gaming on PC or Console	~19%
Radio (Trad. or Online)	~18%
Twitch	~18%
Other Audio Streaming	~16%
Instagram	~16%
Google Search	~16%
Lineal TV Channels	~15%
Mobile Gaming	~14%
X (Formerlly Twitter)	~13%
Bing)	~12%
Snapchat	~11%
LinkedIn	~9%
Pinterest	~8%
Press or Mags (digital)	~5%
Press or Mags (paper)	~5%

Time spent by generation

(% of people using each 3+ hours per day)

Gen X

Cable TV 24%
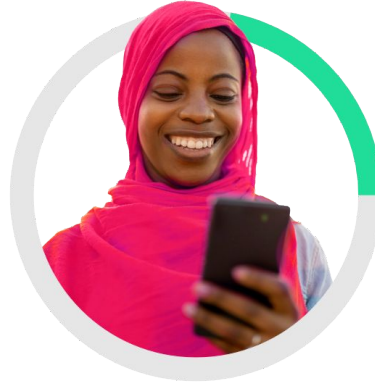
OTT content platforms 22%

Radio 20%

YouTube 17%

The rest of the media:
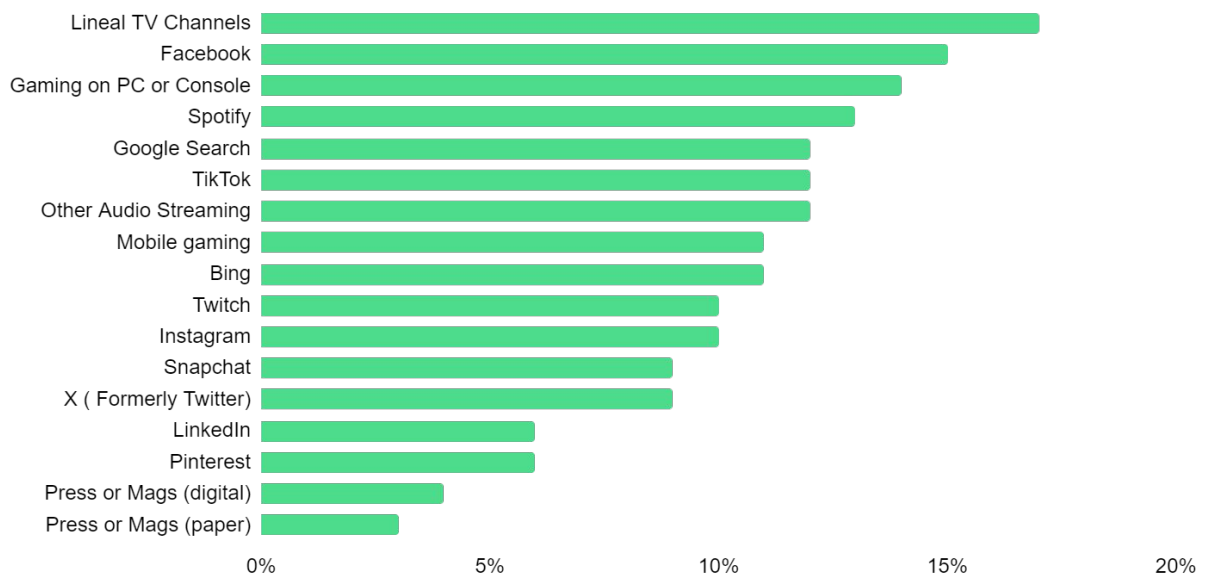
Media	%
Lineal TV Channels	~17%
Facebook	~15%
Gaming on PC or Console	~14%
Spotify	~13%
Google Search	~12%
TikTok	~12%
Other Audio Streaming	~12%
Mobile gaming	~11%
Bing	~11%
Twitch	~10%
Instagram	~10%
Snapchat	~9%
X (Formerly Twitter)	~9%
LinkedIn	~6%
Pinterest	~6%
Press or Mags (digital)	~4%
Press or Mags (paper)	~3%

Time spent by generation

(% of people using each 3+ hours per day)

Boomers

Cable TV 27%

Twitch 22%

Radio 19%

Linear TV Channels 17%

The rest of the media:

Media	%
OTT content platforms	
Spotify	
YouTube	
Snapchat	
Facebook	
Other Audio Streaming	
Gaming on PC or Console	
TikTok	
X(Formerly Twitter)	
Mobile Gaming	
Instagram	
Google Search	
Bing	
LinkedIn	
Pinterest	
Press or Mags (digital)	
Press or Mags (paper)	

0%   5%   10%   15%
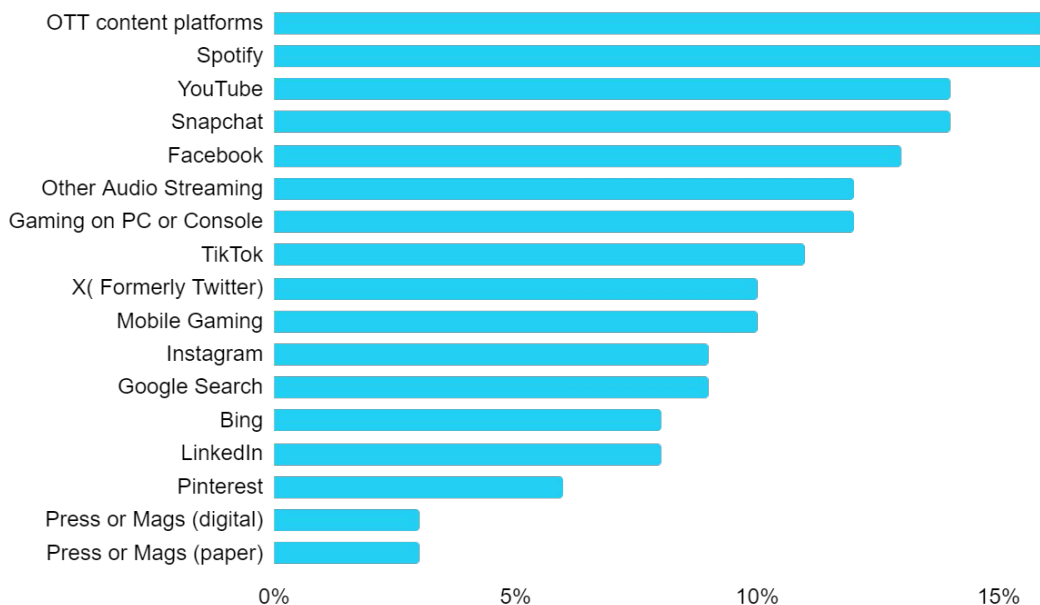
1.2 Media preferences at each stage of the funnel

According to a [McKinsey report,](#) the most successful marketing strategies take full-funnel approaches.

As it turns out, only digital media can offer a personalized experience at every stage of the funnel, from driving awareness at the top of the funnel to powering consideration in the middle, and triggering purchases at the bottom.

At every stage of the funnel, social media and online video pre-rolls reign supreme among Gen Z and Gen Y, whileTV and social media have the heaviest influence on Gen X and the Boomers. What's most interesting is that social media ranks higher than TV among Gen X's and is highly influential among Boomers, once again debunking the idea that Boomers aren't affected by digital media.

While social media, online video pre-rolls, and TV consistently thread across all generations, it's also important to keep in mind that search engines and brand websites can also be potent sales channels. They routinely outperform traditional media (i.e. radio, press, or OOH advertising) in driving purchase intent.In fact, the influence of search engines is directly correlated with the consumer's age, and brand websites and apps tend to affect purchase decisions as much as radio, OOH, and press combined, reiterating one more that digital platforms are effective on all age groups.

IZI's full-funnel campaign delivers impressive results

A full-funnel approach requires time and meticulous planning, and should be included in the campaign blueprint from the get-go. Kazakhstani telco VEON wanted to promote its consumer app IZI, which offers mobile data packages as well as a host of entertainment options. The all-in-one app wanted to drive both awareness at the top of the funnel, and app downloads and package subscriptions at the bottom. Knowing their objectives were ambitious, IZI partnered with Aleph to roll out a campaign via TikTok's ad solution, Pangle, which optimizes creative assets while enhancing their efficiency, sharpens demographic segmentation, and conducts in-app tracking for real-time impact analysis and optimization.

НЕ ТРАТИШЬ — НЕ ПЛАТИ
Хватит платить за связь каждый месяц! Плати только за то, что тратишь

ДЛЯ ТЕХ, КТО ВСЕГДА ОНЛАЙН
безлимит для соцсетей

Given the elaborate and well-executed strategy, the campaign delivered on both awareness and app installs, achieving an impressive +6% average uplift in in-app events and a 4% lift in app install conversion rates. To boot, **cost-per-thousand (CPM) was**

2x lower

than benchmark, cost-per-click (CPC) was

10X lower

than benchmark, and cost-per-install (CPI) was an astounding

10% lower

than benchmark!
Through TikTok's digital solutions, IZI's highly targeted, multi-pronged campaign spotlighted different IZI products and features to the right audiences.

Implications for marketers

1 **Consumer have a preference for digital media globally:** Digital media dominates the global media landscape in both reach and time spent. With five digital media platforms - YouTube, Facebook, Google Search, Instagram and TikTok being the most widely consumed media in the world, marketers have a golden opportunity to double down on digital-first campaigns to reach all audiences. Marketers should, however, adapt their message to local needs and nuances to maximize user engagement.

2 **Look beyond reach:** While investing in the five key platforms (see above) can offer extensive reach, other media should also be considered for their unique characteristics. For instance, consider Snapchat for connecting with younger generations, Twitch for deeper community engagement, Spotify for the amount of time spent, and 𝕏 (formerly Twitter) for special cultural moments or time of day. By looking at dimensions beyond reach, brands can tap into a host of alternative platforms that can help them stand out from the crowd.

3 **Tailoring content for different generations:** Each generation has their own distinct media consumption habits. Gen Z prefers interactive and social platforms and Gen Y is more focused on work and entertainment-related media. Meanwhile, Gen X and Baby Boomers consume more traditional media for information and news. Marketers should understand their audiences and their expectations and tailor content and advertising strategies to these preferences.

4 **Time of day matters:** The time of day significantly impacts media consumption. Social media and online video platforms consistently engage users from morning to night, reaching consumers throughout the day.. Marketers should take these fluctuations into consideration by first analyzing their audience's behavioral patterns across the day before scheduling campaigns and content release times.

5 **Multi-screen challenges:** With multi-screening, where users engage with multiple devices simultaneously, being increasingly prevalent, marketers must adapt their advertising strategies. This can involve deploying QR codes, real-time triggers, or interactive elements to capture users' attention across channels and screens.

Ask Aleph:

Looking beyond conversions to see the full picture

Over the past month, one in three global Internet users have made a purchase via a brand website or app, and just as many have bought something via social media.

Regardless of which platform(s) a marketer uses, they must keep in mind that while conversion is key, other metrics, including Return of Ad Spending (ROAS) and Cost per Acquisition (CPA), are also critical and should be monitored regularly to understand the effectiveness of each channel.

Aleph Expert
Mirna Bulic
Partner Director in TikTok LatAM at
Aleph Group, Inc

Chapter 2
Harnessing the power of consumer profiles to fuel the bottom line

In today's blended online/offline, omnichannel environment, consumers are multifaceted and are potential consumers across a number of sectors - from cosmetics and travel, to sports and beverages. Consumers might buy a generic lipstick brand one day and book a luxury flight the next, or be an avid tennis fan while also shopping for kombucha kits. It's become more challenging than ever to predict people's product choices, but there are certain distinct traits that drive consumer behaviors, media choices, and purchasing patterns, regardless of geographical location.

Each collection of traits give rise to a consumer profile, which helps marketers navigate the complex landscape. From deciding where to launch a new product to which markets to expand into, grasping the nuances between the profiles enables brands to create more effective communication in each region.

Based on Aleph's deep expertise in digital media and in building effective marketing campaigns, this research identified six consumer profiles that describe today's shoppers. It's worth noting that consumers can straddle more than one profile, in which case marketers should ensure that their strategy speaks to the combination of profiles.

Consumers can straddle more than one profile, in which case marketers should ensure that their strategy speaks to the combination of profiles.

1

The Needs-based:
These consumers only make purchases as and when they need them, and are not swayed by impulse or desire.

4

The Early Adopter:
This consumer is constantly on the lookout for the latest products and services and are the first to buy and try them out.

2

The Price-sensitive:
These shoppers prioritize cost over brand and tend to buy the lower priced option, regardless of brand. They often shop at large retailers, like bulk discount stores, and wait for products to go on sale before buying.

5

The Conscious Consumer:
This shopper is planet-first and willing to pay a premium for eco-friendly, cruelty-free, and organic products. They make it a point to read the labels to ensure they are making informed choices.

3

The Premium Shopper:
These consumers will always opt for the premium versions of a product or service. They often zero in on the "star" product of each category, even if it's the most expensive option.

6

The Loyalist:
This customer prefers to buy from established brands that they're familiar with, and less likely to try lesser-known or new companies

Consumer Profiles by Region

Legend: ■ Need-based ■ Price-sensitive ■ Conscious ■ Loyalist ■ Premium shopper ■ Early adopter
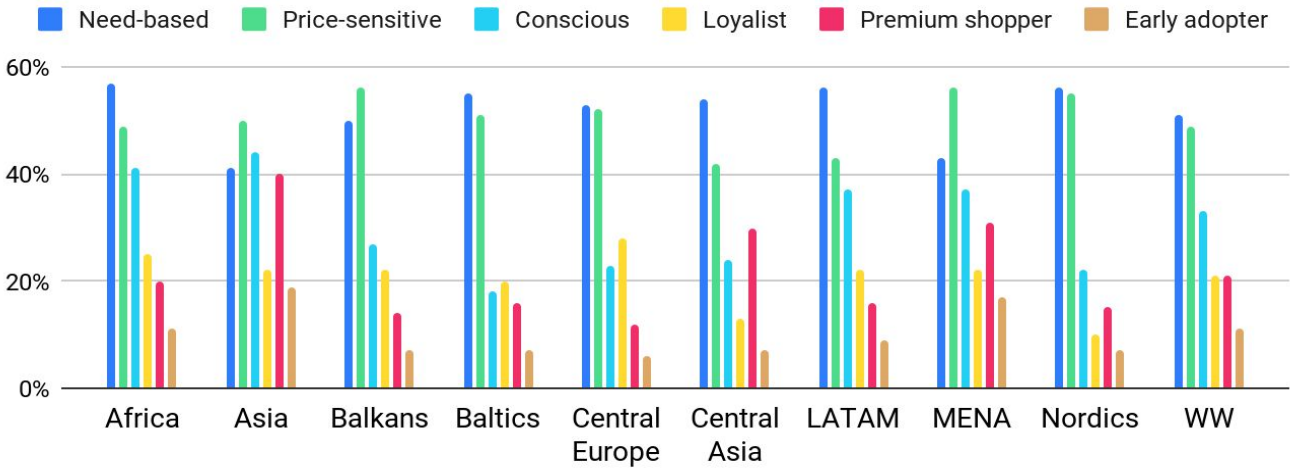
Media Essentials 2024. N=23.400, Early adopter (N=2.473), Conscious consumer (N=7.714), Price-sensitive (N=11.381), Premium shopper (N=4.963), Loyalist (N=4.964), Need-based (N=11.817)

Key shopper motivations:

51%

of consumers are need-based and

49%

are price-sensitive

Need-based & price-sensitive consumers

Globally, 51% of respondents consider themselves needs-based shoppers who make purchases only when they need something. Another 49% consider themselves price-sensitive and are willing to wait for the right price to buy the item. Not mutually exclusive - yes, you can be needs-based and price-sensitive! - these two are the most common consumer types in nearly every region around the world.

Brands and marketers can incorporate these insights into their strategies by taking a needs-based approach, emphasizing human necessities over product promotion. By emphasizing the practicality, functionality, value, and affordability of their offerings, they can establish a more profound connection with potential consumers, ensuring their promotional strategies resonate more effectively. A needs-based marketing strategy ensures brands remain relevant and impactful.

Ispahani Tea lifts ad recall by zeroing in on price-sensitive shoppers

Understanding their audience is generally price-sensitive, Bangladesh's largest tea trading company **Ispahani Tea** partnered with Aleph and Meta to optimize their marketing efforts.

By replacing their longer TV commercials with 15-second videos that highlight their highly affordable teas, they saw an

11.1%

point increase in overall ad recall among the 18 to 65-year old audience set and a

3.3%

point increase in top of mind awareness amongst millennials.

This clearly signaled improvements in effectiveness once they honed in on their highest value customer set - the price-sensitive shopper.

Premium consumers

Aside from the needs-based and price-sensitive profiles being prevalent around the world, there are distinct differentiators in each region. Asia, for instance, is home to the highest number of premium consumers who value quality, craftsmanship, innovation, and the unique shopping experience that typically only premium products provide. This is especially so in subregions such as East Asia and Southeast Asia. The presence of premium consumers in Asia is double the global average, presenting a golden opportunity for marketers to fine-tune
their high-end advertising strategies across this region. The insights gained from the Asian markets can also be effectively applied across other regions with high concentration of premium consumers. MENA, for example, has the second highest concentration of premium consumers, followed by Central Asia.

Asia is home to double the number of premium shoppers than the global average.

Conscious consumers

In both Asia and Africa, there are

2.3x

more conscious consumers than in the Balkans and

1.8x

more conscious users than in the CE and the Nordics.

This signals that African and Asian consumers are reading labels more carefully or prioritizing products with lower environmental impact or that are ethically manufactured, even if it means paying a premium price for it. While these attitudes may seem surprising at first, it's plausible that Nordic consumers may not be willing to pay more for eco-friendly/ethically produced products because such options are often the norm. Their trust in companies or state regulations on products may also be why they are less inclined to read warning or product labels.
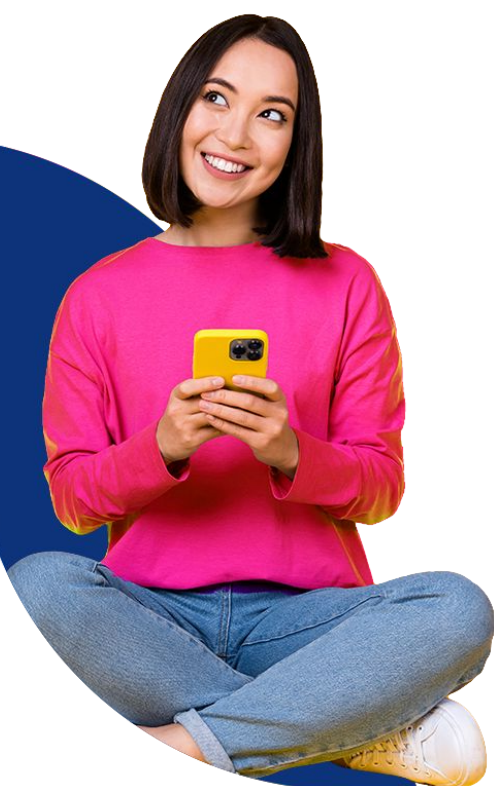
Specifically, Asia's consumers are

2x

more likely than those in the Nordics to pay more for eco-friendly products and Africa's consumers are

2.7x

more likely to read label warnings more frequently than the Nordics.

Early adopter

Early adopters are often visionaries and sit at the forefront of the latest trends. Frequently the first to embrace new products, styles, or behaviors that later popularize among broader audiences, they are usually regarded as opinion leaders and have some influence in their community or industry.

In our analysis, Asia and MENA stood out prominently with Asia having

1.7x

and MENA

1.5x

more early adopters compared to the global average.

Since early adopters are opinion leaders, zeroing in on them can accelerate product adoption and awareness among broader audiences. Brands can benefit from collaborating with influential figures and leveraging media channels they consume, ensuring a strong initial reception as well as strong potential for organic growth and trend-setting within these influential communities.

APAC & MENA is home to 1.6x more trendsetters than the global average

The Loyalist

When it comes to brand loyalty, our research shows that **Central European consumers take the lead with**

28%

claiming to be "Loyalists" - those who self-identify with a brand's values and the perceived brand quality.
Africa is also home to many Loyalists. One in four claim to be loyal - almost

20% higher

than the global average.

The Nordics, however, are the least loyal to established brands, with only 10% willing to buy a brand solely because it is well-known.

For brands looking to engage the 'Loyalist' segment, the key lies in reinforcing brand values and upholding product quality. Brands can also further invest in existing customer retention programs and focus on community-building in order to capitalize on existing affinity. Understanding what drives consumer allegiance will allow brands to tailor their engagement strategies effectively, with a higher likelihood of long-term success.

2.1 Purchase drivers of each consumer profile

Successful marketing requires a customer-first approach. This involves understanding customer needs and the factors influencing purchase decisions. While brands can't control every driver, e.g. inflation, competition, or natural calamities, many can be controlled. An in-depth understanding of the manageable factors are what allows brands to turn them into opportunities.

Our research identified the drivers that brands can control, such as product reviews and ratings, haul/unboxing videos, and tutorials. Haul/Unboxing videos resonate the most with premium consumers (35%) and interestingly, **early adopters, often seen as the vanguard of consumer trends, lean heavily towards influencer recommendations at**

41%

Product reviews and ratings hold substantial sway over premium consumers at

57%

closely followed by price-sensitive consumers at

52%.

Similarly, expert and professional endorsements can be highly effective for brands.Premium consumers show a strong reliance on expert or professional opinions, registering at 63%, followed by early adopters at 57%.

Factors like promotions and discounts are also strong purchase drivers and are managed by the brand, but they aren't always the best path to take since they can wind up denigrating[7] the brand - or even the sector - if used too frequently.

Purchases drivers, by consumer profile

	Conscious Consumer	Early Adopter	Loyalist	Need-based	Premium Shopper	Price-sensitive
A friend or family memeber recommendation	55%	51%	57%	51%	59%	54%
An expert / professional recommendation	45%	57%	43%	38%	63%	38%
Haul / Unboxing videos	22%	34%	17%	14%	35%	19%
Influencers recommendations	30%	41%	23%	19%	34%	23%
Product reviews and ratings	50%	54%	46%	48%	57%	52%
Promotions or discounts	65%	62%	59%	64%	67%	71%
The brand's advertisements	36%	59%	31%	22%	48%	29%
Tutorials / recipes	34%	38%	27%	22%	38%	28%

Source: Aleph Media Essentials 2024: N=23.400, Early adopter (N=2.473), Conscious (N=7.714), Price-sensitive (N=11.381), Premium (N=4.963), Loyal (N=4.964), Need-based (N=11.817)

In essence, comprehending the diverse purchase drivers within your target audience enables you to create marketing strategies that are not only impactful but also efficient, customer-centric, and adaptable to the ever-evolving marketing landscape. It's a strategic imperative for any marketer wanting to build lasting relationships and drive business success.

early adopters most likely to listen to influencers; Expert and professional have the most sway on premium shoppers

[7] Welcome to IMGFUCK: Seven steps to kicking your price-promotion addiction

2.2 Media consumption by consumer profile

Marketers should also consider the affinity certain user profiles have with specific media - or each consumer type's platforms of choice.

For instance, you are more likely to find an early adopter on

 +70%

 +40%

 +20%

 +13%

than average

This means brands intending to generate buzz and connect with early adopters should include one or more of these four channels in their media planning. These four can also be leveraged when launching new products that target early adopters, since these users will likely be the first to use, review, create content, and spread the word about them.
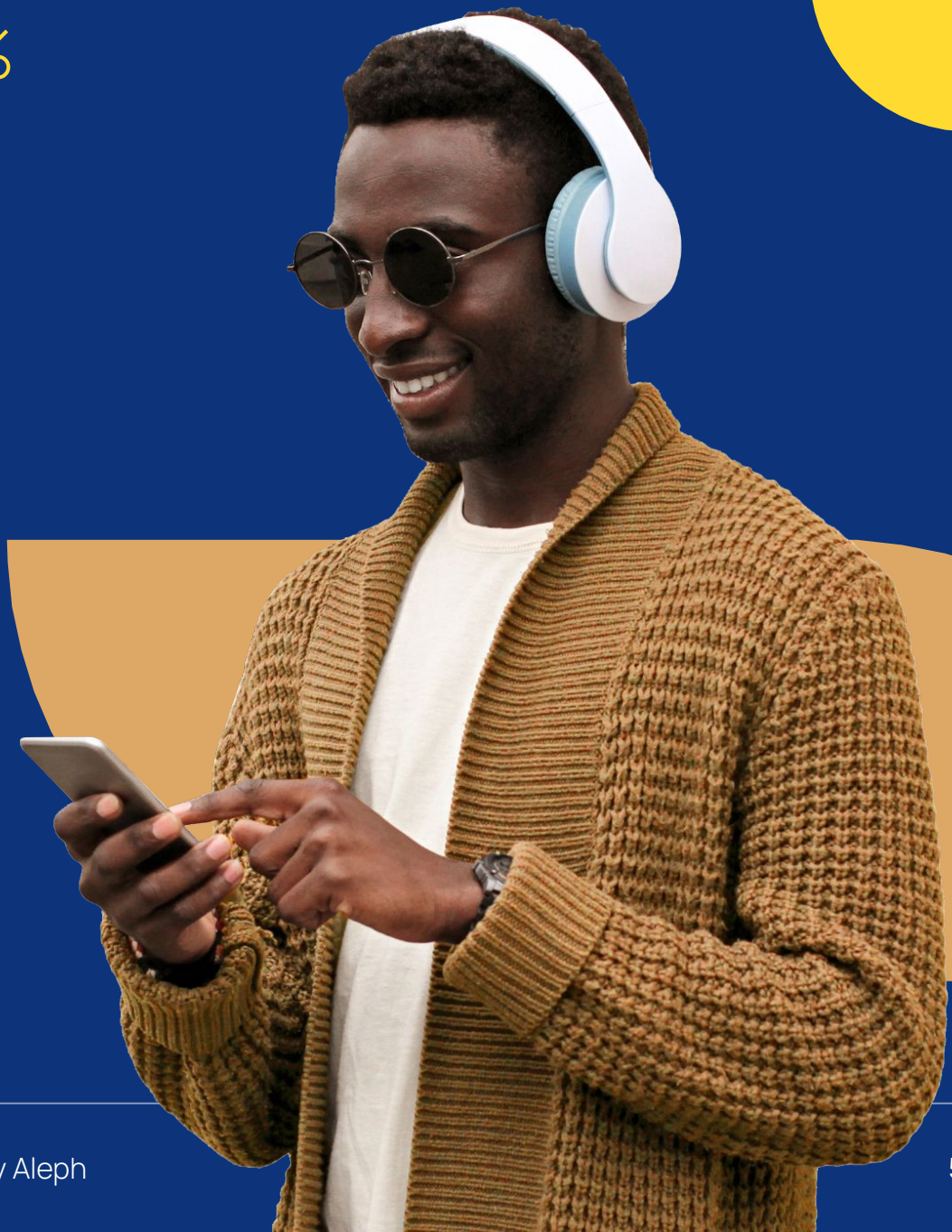
Affinity increase among conscious consumers

in	+27%
(Twitch)	+23%
P	+23%
X	+22%
(Snapchat)	+19%
(Spotify)	+19%

These users tend to read and seek additional information on the company, indicating that they are more likely to research a brand before patronizing them and are more intentional in their decision-making.

On the other hand, **price-sensitive buyers stand out most on Twitch (+84%) and Snapchat (+69%).**

This trend likely stems from these platforms' high appeal to younger audiences, who typically have smaller budgets than older audiences.

Users of 𝕏 (formerly Twitter) and Spotify also are noteworthy, being +40% above average each.

**Premium shoppers
show a high affinity with**

Twitch +58%
Snapchat +48%
𝕏 +32%
Spotify +32%

and

LinkedIn +30%

Though each platform has unique features and focuses, all five are social media channels. This could be due to several reasons, including how premium shoppers look to social media communities for inspiration, to gather information and reviews about a product, or perhaps to seek peer validation, among others.

**Loyalists
show the highest affinity for**

LinkedIn +22%

followed by

Pinterest and 𝕏 +18%

each

As they tend to offer higher lifetime value and revenue stability at reduced marketing costs, Loyalists are an essential customer set for any business and should be continuously nurtured over time.

As for the world's favorite digital media platforms YouTube, Facebook, Google Search, Instagram, and TikTok, their reach is so broad that all consumer profiles can be found on these platforms. They don't necessarily stand out for any specific user behavior, but instead engage a wide range of consumer segments all at once.

Media affinity, by consumer profile

	Conscious Consumer	Early Adopter	Loyalist	Premium Shopper	Price-sensitive & Need-based
f	103	104	105	101	104
Instagram	109	113	105	111	113
in	127	132	122	130	132
Pinterest	123	126	118	117	126
Snapchat	119	169	103	148	169
Spotify	119	140	109	132	140
TikTok	108	118	103	111	118
Twitch	123	184	107	158	184
X	122	140	118	132	140
YouTube	104	102	104	102	102

Note: Media affinity is calculated as the ratio of the % of people in the target group consuming a particular media to the % of people in the entire population consuming the same media. In this case, it's (% of media consumption in each shopper profile / % of media consumption on average)*100, meaning the higher the value, the better the media fit with a specific type of profile.

Media Essentials by Aleph

2.3 Advertising impact across consumer profiles

Our research confirms a key trend in today's advertising landscape: digital platforms dominate. When examining the influence of advertising channels against the six consumer profiles, social media, pre-rolls videos, TV, and search engines all stand out as being consistently effective at reaching audiences across the entire funnel.

Most influential media channels for each stage of the marketing funnel

Brand Recall
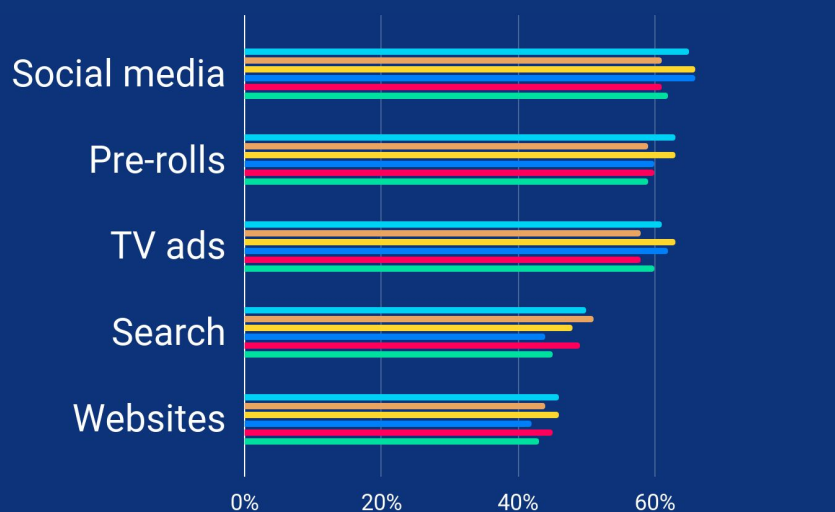
Brand Consideration
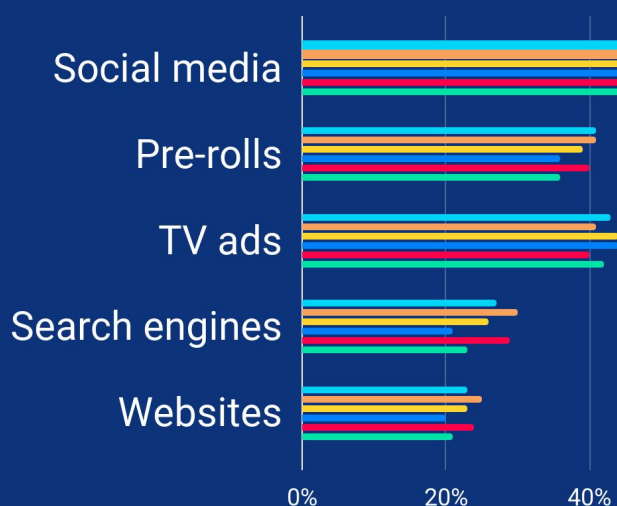
Drive action
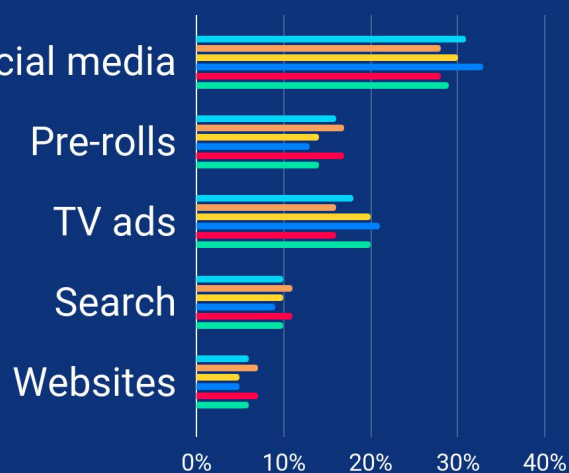
Legend:
- Conscious consumer
- Early Adopter
- Loyalist
- Need-based
- Premium shopper
- Price-sensitive

While some channels resonate more with certain profiles, social media performs well across the board, especially with needs-based, loyalists, and conscious consumers.

Across all stages of the funnel, the growing influence of pre-rolls hints at the expanding role of video content in today's decision-making journey. All the while, the role of TV advertising continues to shrink as audiences transition online.

The influence of search engines is relatively constant, underscoring the importance of having a solid SEM and SEO strategy and optimized web content.

Aside from the channels listed here, a myriad of other platforms can also be excellent choices to advertise on. Each features different strengths and offer marketers unique opportunities to target particular stages of a consumer journey or to reach specific marketing objectives. The Key is to determine what works best when and for whom.

How Tymbark transitioned online via Spotify

Polish soft drink brand Tymbark launched an innovative campaign on Spotify with the aim of driving purchase intent and fostering an association to summer feel-good music. In partnership with Aleph, the Tymbark team introduced six-themed playlists affiliated to six different influencers to produce a unique experience that marries excellent music and the refined taste of Tymbark's beverages.

Using personalized audio, sponsored content, and overlays, the company generated

13.8k minutes

listened among an audience comprising

35%

premium listeners and a

65%

increase in free users.

In addition to the Spotify campaign, Tymbark also leveraged the influencers to share the playlists to their communities and post about it on Instagram and Facebook, among other platforms. This campaign exemplifies how a traditional company can embrace digital opportunities to achieve their business goals.

Ask Aleph:

Based on the findings of in this report, marketers should evaluate the following when planning their next marketing campaign:

1 | What consumer profile should we leverage when promoting our product or service?

2 | The purchase drivers that inspire action in your audience. Whether it's expert opinions, tutorial videos, or a friend's recommendation, find a way to marry what resonates with your consumer with your brand.

3 | Select the media with the highest affinity for your selected consumer profile.

To illustrate this, brands who target premium users should consider partnering with 𝕏 because of the media affinity premium users have with the platform. 𝕏 users are known as opinion leaders and they influence the influencers; they are usually the first to try a product, or most likely to recommend a product they are familiar with. You can also consider engaging an expert for your campaign, as research data shows that premium customers are most influenced by expert/professional recommendations.

Aleph Expert
Ingrita Zrinušić
Partner Director at
Aleph Group, Inc

Implications for marketers

1 — **Segmented marketing strategies.** Understanding the consumer profiles is crucial for marketers. Different profiles have distinct purchasing behaviors and motivations. Marketers should segment their marketing strategies to cater to the specific consumer needs and preferences. This includes creating tailored messages, offers, and advertising campaigns.

2 — **Purchase drivers for each profile**. To craft effective marketing strategies, it's essential to deeply understand the unique purchase drivers of your target consumers. While certain factors are byond a brand's control, many drivers can be influenced directly. It's crucial to recognize which elements resonate most with specific consumer segments and tailor marketing efforts accordingly. Endorsements, whether from experts or influencers, can be potent tools, but brands must use them discerningly. Likewise, while promotions and discounts can be enticing, over-reliance might compromise brand value.A balanced, considered approach that centers around the consumer will yield optimal results.

3 — **Media channel alignment.** Each consumer profile tends to have an affinity for specific media channels. Marketers can use this information to align their advertising efforts with platforms that are the most likely to reach and engage their target consumers. For example, early adopters are more active on Snapchat, Spotify, TikTok, and Instagram, so brands targeting this group can benefit from advertising on these platforms.

4 — **Advertising influence.** The data strongly emphasizes the dominance of digital platforms in today's advertising landscape. Our research shows that marketers across growth markets should prioritize and invest in digital media channels.Yet, a holistic marketing strategy that considers both digital immediacy and broader outreach remains essential when trying to reach a diverse consumer base.

Chapter 3

The online/offline shopping experience

Unparalleled convenience, the ability to shop from anywhere, any time, and at better prices than in-store options have fueled e-commerce adoption over the last few years.. As a result, people are now more likely to go online for their next purchase than to a traditional bricks-and-mortar store8.

Over 50%

of the respondents in our research buy

50% or more

of their purchases online, though exact purchasing behaviors vary due to cultural influences, logistics infrastructure, and product availability.

According to our study, the main drivers of this shift are convenience, time-saving benefits, and promotional offers (for four in 10 individuals).

[8] Insider Intelligence/ eMarketer. Retail Ecommerce Sales in Worldwide Forecast

Main factors that drive online shopping over purchases in physical stores

41% Convenience and time-saving

40% Competitive prices and deals

34% Wide product variety

25% Easy shipping and return

25% Product reviews and social proof

24% Payment options: Secure and convenient

17% Enhanced search and filtering

13% Privacy and anonymity

12% Safety concerns/ Avoid crowded places

9% Environmental considerations (carbon footprint)

9% Customization options

As consumer preferences continue to evolve, brands must remain attentive to shifting trends and adapt their approaches accordingly. While factors like product variety, environmental concerns, and personalization remain important, it's clear that convenience and promotions should be the emphasis.

Ask Aleph:

Enhancing the hybrid shopping experience

The global shift online has reshaped consumer behaviors over the last five years, with convenience and accessibility powering the trend. E-commerce has rocketed across regions, including a +118% spurt from 2018 levels in Africa, +57% in South America, +43% in the Balkans and Central Europe, +35% in Asia and +17% in Northern Europe. This surge in e-commerce adoption worldwide requires brands to prioritize and optimize their online presence, while ensuring their offline experience supports the hybrid shopping experience.

eCommerce penetration rate

Legend:
- Africa
- Asia
- Eastern Europe
- Northern Europe
- South America
- Southern Europe
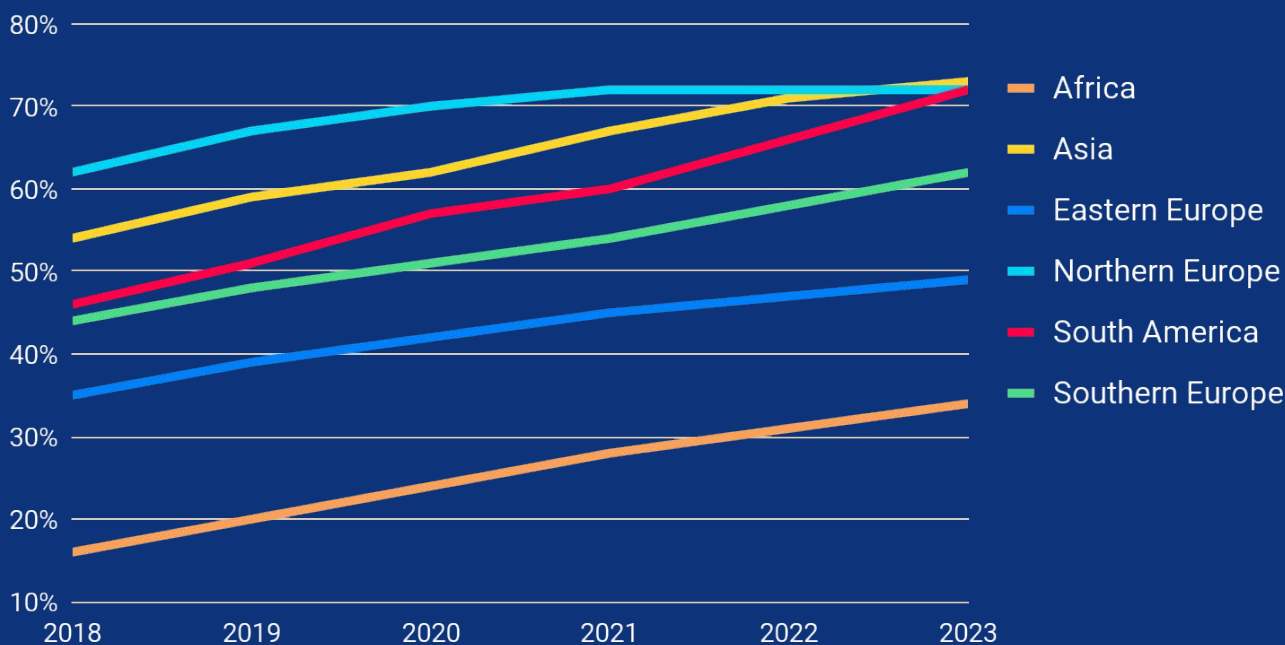
Source: Statista Market Insights. Retrieved Nov 2023.

Aleph Expert
Eliana Iturria
Global Research Sr Manager
at Aleph Group, Inc

Omnichannel is the most common way to shop

Today's purchasing journey has assumed an entirely new shape and form, commencing long before shoppers ever set foot in a store. Consumers across regions now go online to research the product or service well before leaving the house, so when they finally do arrive at the shop, it's more to experience the product, the brand experience, or perhaps to discover an entirely new product or service. In short, the days of the linear purchasing journey are long gone and today's shopping journey is an omnichannel experience that spans both the digital and the physical worlds.

3 of 4
consumers use their phones in-store to research or make purchase inquiries

Consumers are mixing and matching their purchasing methods across channels: **4 in 10 users globally look up information before making a purchase,** and that number goes up to 5 in 10 in LATAM and MENA.

A staggering 76% turn to their phones to make an inquiry about the product they've just seen at the store, 45% compare online and store prices on their mobile devices, and nearly 3 in 10 decide to buy the product online despite standing in the physical store at that moment.

Only
1 in 10
people shop exclusively in physical stores now

Only 12% of respondents purchase solely from traditional bricks & mortar stores versus 52% who buy at least half of their purchases digitally. Interestingly, the Balkans, Central Europe, Africa, and the Baltics all still lean more towards traditional in-store shopping, with nearly 6 in 10 making 75% or more of their total purchases in physical stores. However, the **online shopping phenomenon can be seen across the globe from India to Cambodia and Egypt to Saudi Arabia, where 65% of Asian and 60% of African consumers are making half to all of their purchases online** - marginally more frequently than their Nordics counterparts at 59%.

Percentage of purchases made in-store versus online

	WW	Africa	Asia	Balkans	Baltics	CA	CE	LATAM	MENA	Nordics
100% of my purchases are in-store	12%	12%	9%	14%	12%	11%	12%	14%	10%	7%
75% of my purchases are in-store	36%	42%	26%	48%	42%	35%	47%	33%	30%	34%
50% are made online and 50% are made in-store	36%	31%	42%	29%	34%	39%	29%	37%	41%	38%
75% of my purchases are made online	14%	13%	20%	9%	12%	13%	11%	15%	18%	19%
100% of my purchases are made online	2%	2%	3%	1%	1%	1%	2%	2%	1%	2%
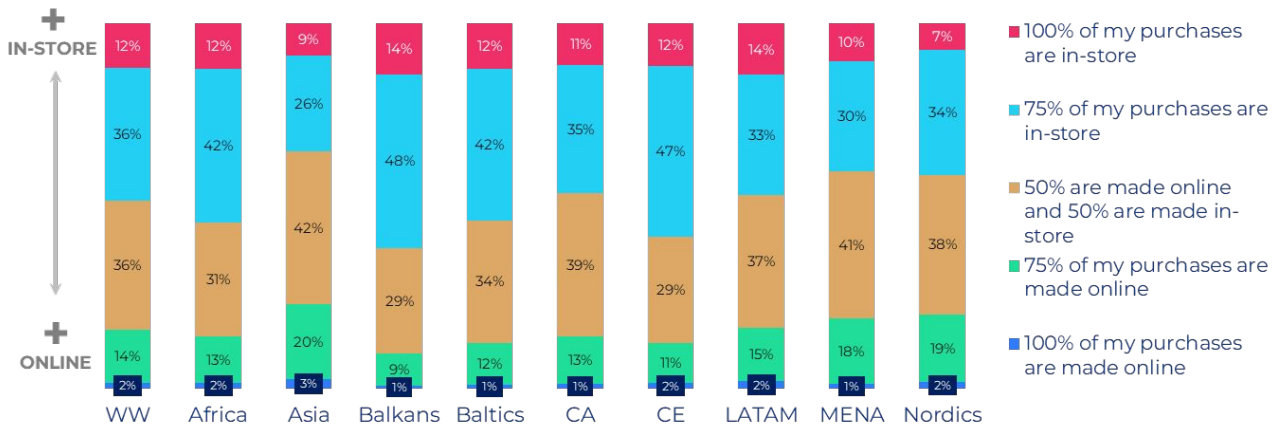
Source: Media Essentials by Aleph 2024. N=23.400

In LatAm and Central Asia, over half shop online (53% in LatAm and 54% in Central Asia) while the other half still prefer in-store purchases (47% in LatAM and 46% in Central Asia). This can mostly be attributed to cultural preferences and product accessibility, which includes logistics (e.g. last-mile delivery, returns processes, etc) and regulatory infrastructure (e.g. customs).[9]

When looking at generational trends towards shopping, our research revealed that **more Boomers shop in-store than younger generations (Boomers at 55%, Gen Y at 43%, and Gen Z at 46%).** And especially in regions like Africa, the Balkans, the Nordics, and Central Europe, young people demonstrate a greater inclination toward online shopping, as opposed to Baby Boomers or Gen X.

Young individuals also tend to divide their purchases into 50% online and 50% in-store more frequently than their older counterparts. In most regions, younger consumers tend to have more flexible shopping habits, whereas older generations generally adopt a more routine approach to shopping.

The sole region where there isn't a clear trend regarding online and in-store shopping based on generational cohorts is in LatAm and the Baltics.
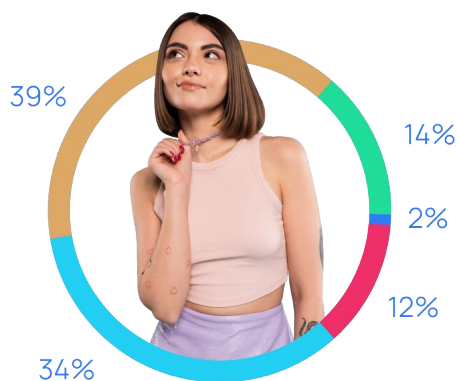
Interestingly, age doesn't have as much bearing on shopping attitudes as one might expect, signaling that older generations' purchasing behaviors are increasingly digitized.

[9] DHL website. Insights and innovation; Ecommerce in Latin America

Considering all your shopping, what percentage of your purchases would you estimate is made in-store versus online?

Gen Z

- 39%
- 14%
- 2%
- 12%
- 34%

Gen Y

- 40%
- 15%
- 2%
- 9%
- 34%

Gen X

- 35%
- 13%
- 1%
- 11%
- 40%

Baby Boomers

- 28%
- 16%
- 2%
- 16%
- 39%
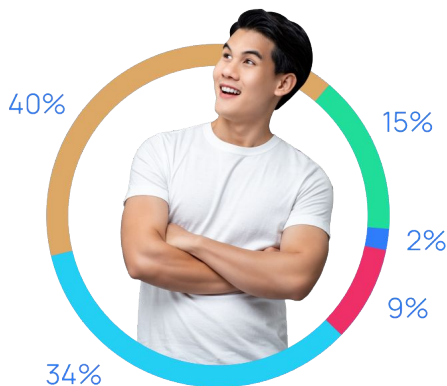
Legend:
- ■ 100% of my purchases are in-store
- ■ 75% of my purchases are in-store
- ■ 50% are made online and 50% are made in-store
- ■ 75% of my purchases are made online
- ■ 100% of my purchases are made online
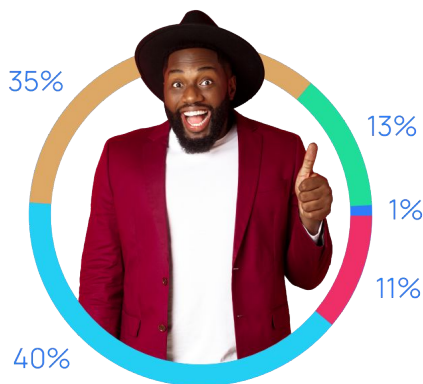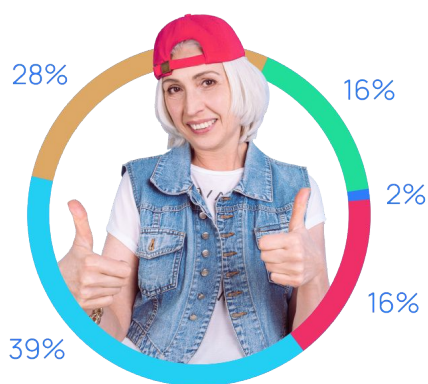
Aleph Media Essential 2024. Gen Z (N=5899), Millennials (N=5909), Gen X (N=6009), Boomers (N=5583)

Three in 4 shoppers are exhibiting omnichannel behaviors, and brands need to enhance the customer experience both online and offline. Over the next two sections, we explore how brands can optimize their in-store shopping experience, as well as how they can elevate the online purchasing experience with the aim of maximizing the entire omnichannel experience.

Optimizing the in-store experience

The practice of using mobile phones to compare prices, read reviews, and research products while in-store - aka ROPO, or Research Online to Purchase Offline - has reshaped the retail landscape. It's particularly heightened in LatAm and MENA, where ROPO behaviors exceed the global average by 21% and 31%, respectively.
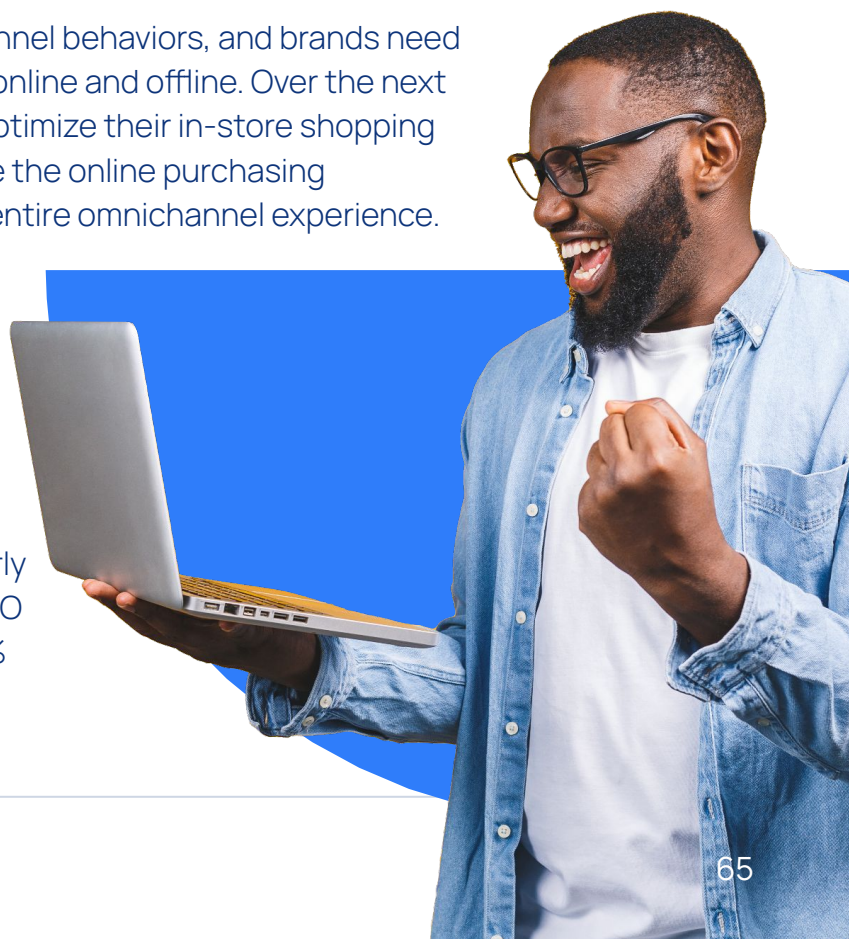
Internet Usage in Physical Store Shopping Activities (*Frequent or Very Frequent*)

Nordics
- 43%
- 31%
- 30%
- 25%
- 30%
- 23%

CE
- 28%
- 19%
- 19%
- 16%
- 19%
- 15%

Balkans
- 37%
- 32%
- 31%
- 28%
- 27%
- 20%

Baltics
- 33%
- 24%
- 23%
- 21%
- 24%
- 18%

Asia
- 45%
- 43%
- 44%
- 42%
- 39%
- 39%

LATAM
- 55%
- 50%
- 48%
- 45%
- 43%
- 31%

MENA
- 54%
- 55%
- 51%
- 49%
- 46%
- 39%

Africa
- 43%
- 39%
- 40%
- 37%
- 33%
- 22%

CA
- 29%
- 26%
- 30%
- 30%
- 25%
- 27%

WW
- 45%
- 41%
- 39%
- 37%
- 35%
- 28%
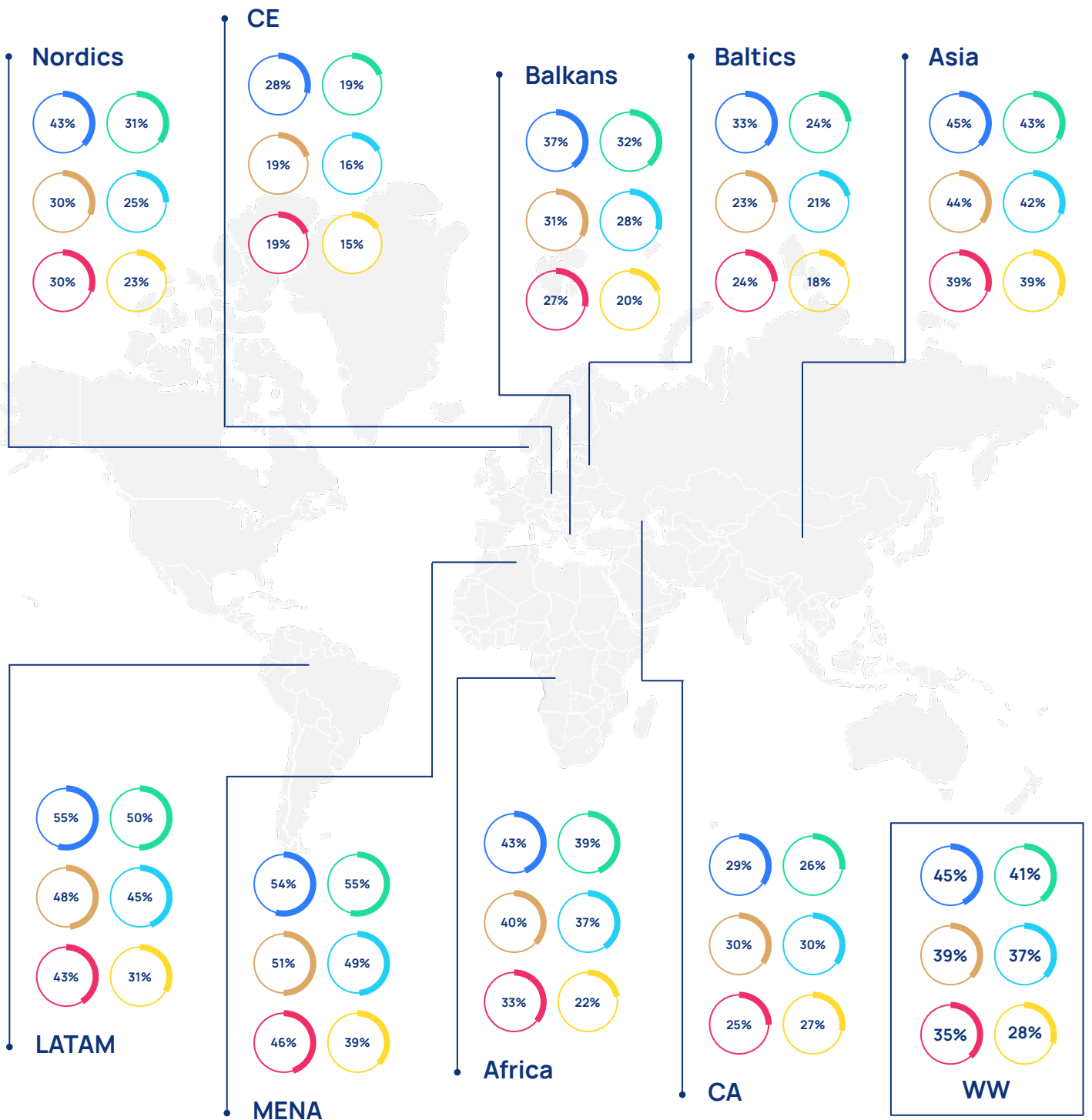
Legend
- 🔵 Comparing prices
- 🟢 Researching product specifications and features
- 🟤 Reading product reviews and ratings
- 🔵 Exploring and finding new products
- 🔴 Check product availability in other stores / locations
- 🟡 Decide to buy online despite being physically in the store

Brands wanting to grasp this opportunity can bridge the online/offline experience by offering in-store Wi-Fi and deploying QR codes, by enhancing the in-person experience with personalized notifications, and by creating immersive product demos. Regardless of what the hybrid experience comprises, creating a seamless, positive shopping experience across all channels is the key to meeting the ever-evolving needs of consumers everywhere.

Ask Aleph:

Let the in-store experience complement the online one

When the path to purchase has changed so much, brands need to rethink the in-store experience. Help the consumer build a journey that pulls together their experience in a cohesive way.

For example, a user in a shop looks up a new product they're curious curious about on Bing. They find the price, product specifications, color choices, and is then taken to the brand website to sign up for more information and future offers - a far advancement from the days when the offline experience was a singular, siloed event.

Aleph Expert
Šarūnas Sakalauskas
Microsoft Advertising Europe Partner
Director at Aleph Group, Inc

What consumers seek from online shopping

Whether looking to re-engage existing clients, find new ones, or grow their business overall, e-commerce players wanting to drive sales and achieve success should offer customers the features they desire most. Our research shows that each region has a unique set of triggers that either encourage or deter consumers from purchasing online, and companies should continuously upgrade the online experience to meet the needs and preferences of their local consumers.

Brands should regularly and frequently communicate these benefits to their customers. If a brand is dropping their prices or revising a return policy, announcing and reminding audiences of this across their assets (websites, apps, marketplace storefronts, etc.), as well as via their marketing platforms (ads, social media, etc.) is paramount.

> Brands should regularly and frequently communicate their features and benefits to customers.

3.1 Features that steer the online purchasing decision

1 Comparing prices

Comparing prices is a universal activity and often plays a decisive role in purchasing decisions. In Asia and MENA, however, price sensitivity is generally lower, or is at least not the sole deciding factor, as evidenced by the -19% and -13% difference between Asia and MENA, respectively, and the global average. This could be because these regions place higher value on convenience and quality than other factors. That's not to say that price is not important. Rather, price is a fundamental consideration that Asian and MENA consumers consider somewhat less of a priority.

-19%

difference in Asia and a

-13%

difference in MENA versus the global average

[10] Statista: Ranking of countries with the highest number of downloads of the SHEIN-Fashion Shopping Online application in 2022.

[11] Statista: Who's Shopping at China's AliExpress?

2 Free delivery

Free delivery is the second most highly-ranked factor in the world, especially among Nordic, Balkan, and LatAm consumers. This preference can be attributed to a variety of factors, including consumer culture, e-commerce infrastructure, and market competition. In more competitive markets, companies often use free shipping as a differentiator, but that's highly reliant on efficient logistics and transportation infrastructure, making its importance across regions variable. In Latin America, free shipping is often perceived as a big advantage, especially as purchases from Chinese companies like Shein and AliExpress grow.[10,11]

3 Fast delivery

The regions that place the highest priority on fast delivery are Africa, with

57%

of respondents considering it important, and Latin America, with

55%

The key here is to determine what "fast" means in your market. 'The Future Shopper 2023' by Wunderman claims that Latin Americans and South Africans are among the top 10 countries most impatient for their deliveries. 'Delivery within two hours' is deemed vital, which would be a telltale sign that local brands ought to prioritize fast delivery. When factoring in the infrastructure and delivery 'norms', however, this is not always possible. It's better to underpromise and overdeliver than the opposite, and consistency is key. Also bear in mind that each sector has its own set of expectations and limitations: grocery deliveries don't share the same expectations as clothing or electronics. Understanding what works for you and your customers is crucial to delivering an efficient and satisfactory service.

[12] Wunderman: The Future Shopper Report 2023

4 Coupons and discounts

In the Balkans and Central Europe, coupons and discounts are important in driving online purchases, with a respective

45% and 44%

of consumers considering them important.

This highlights how effective coupons are in attracting consumers and building brand loyalty in these two regions - a strategy that online platforms can adapt for their purposes.

5 Ease of returns

In APAC, MENA, and Africa,

39%, 38%, and 36%

of respective consumers consider ease of returns crucial,

higher than other regions. While convenience and reliable return processes were listed as main factors, the cost of returns should also be kept in mind as that cost can soar for smaller retailers, especially those in the clothing, shoes, bags and accessories space given they were the most commonly returned online purchases in 2023.[13, 14] To counter this, brands should find ways to reduce return rates by improving their product descriptions and presentation online. The more information offered on the website, the less likely the customer needs to return the item. This could include providing detailed size charts in both centimeters and inches, specifying the composition and fabric of each garment, adding more photos and videos of the product, showcasing models of various sizes using or wearing them, or even incorporating try-on lenses.[15]

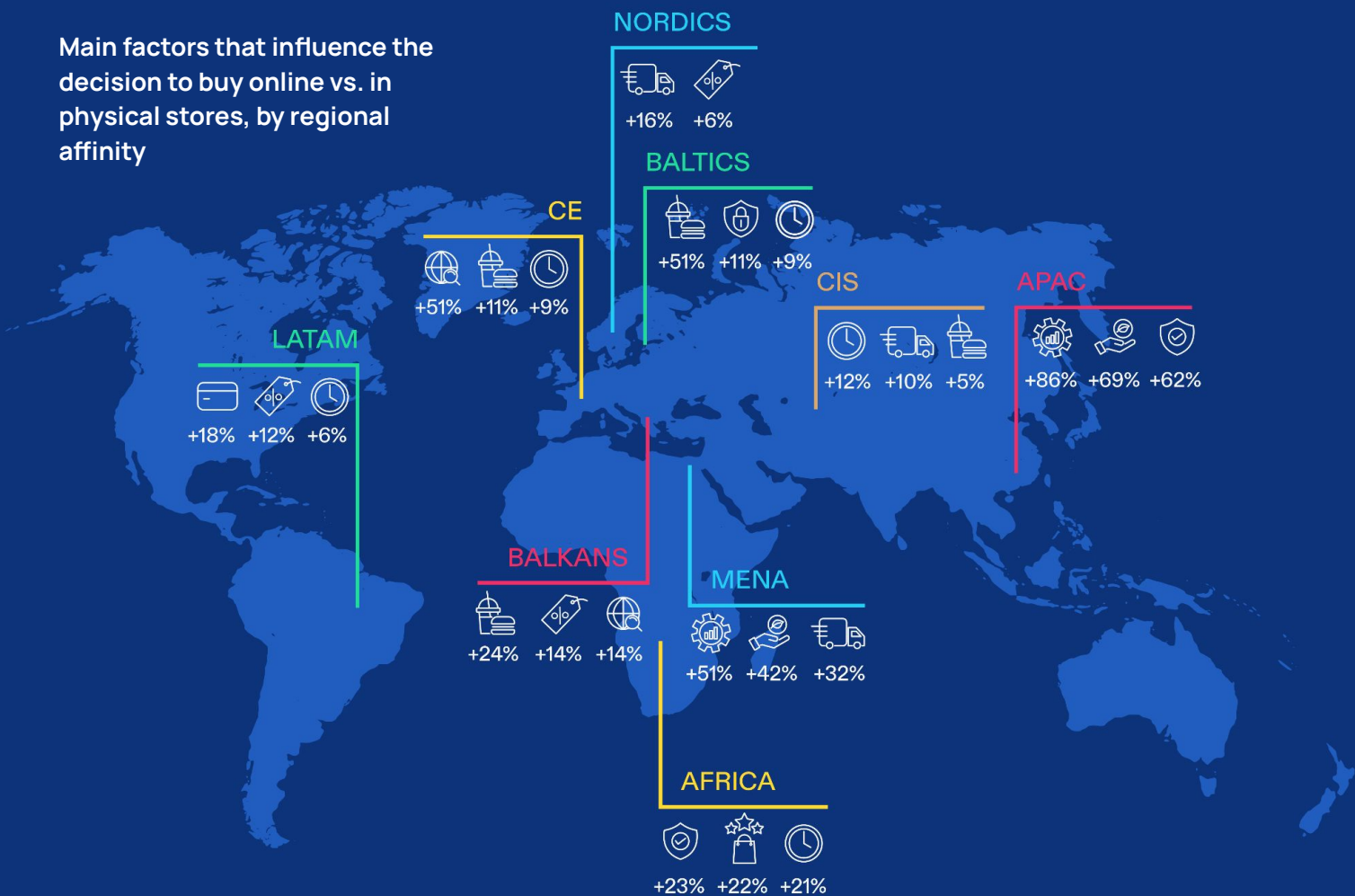13 Statista: Most returned online purchases by category in the U.S. as of September 2023

14 Statista: Most returned online purchases by category in the UK as of September 2023

15 Snapchat for business: Christian Dior addict case

To further break down the reasons to shop online by region, LatAm highly values a variety of payment methods (+18%; more below), competitive prices (+12%), and time saved (+6%), while Asians turn to online platforms for product customization (+86%; i.e. memory, storage, screen quality when buying a new laptop), to reduce carbon footprint (+69%), and the ability to shop securely from home so they can avoid crowded places (+23%). In the Baltics, however, privacy and anonymity take precedence (+7%), perhaps driven by a historical need for privacy and discretion, and in the Balkans and CE (+51%), enhanced search and filtering options that enable the consumer to easily find the items they're looking for are the biggest reasons to purchasing online.

Main factors that influence the decision to buy online vs. in physical stores, by regional affinity

NORDICS
+16% +6%

BALTICS
+51% +11% +9%

CE
+51% +11% +9%

CIS
+12% +10% +5%

APAC
+86% +69% +62%

LATAM
+18% +12% +6%

BALKANS
+24% +14% +14%

MENA
+51% +42% +32%

AFRICA
+23% +22% +21%

Icons reference

Convenience and time-saving: Shop anytime, anywhere, and avoid physical store visits

Wide product variety: Access to more products, brands, and detailed information

Competitive prices and deals: Better prices, discounts, and exclusive promotions

Product reviews: Read customer feedback and recommendations

Easy shipping and returns: Fast shipping and simplified return policies

Privacy and anonymity: Shop discreetly without in-person interactions

Customization options: Personalization features by online retailers

Environmental considerations: Reduce carbon footprint by avoiding travel

Safety concerns: Avoid crowded places and potential illnesses

Payment options: Secure and convenient online payment methods

Enhanced search and filtering

3.2 Barriers to online shopping

In the dynamic world of e-commerce, it's important for brands to recognize what compels an individual to buy a product, but it's equally vital to understand what experience and to resolve them as quickly as possible.

Distrust, often caused by unverified accounts, delays in response times, poor product reviews and ratings, etc., impacts all regions similarly at an average of 43%, but is especially the case in LatAm (+18%). Distrust in a brand prevents about 50% of Latin Americans from making online purchases - a massive barrier that's often exacerbated by shipping delays (affecting 43% of potential customers) and a lack of warranties (affecting 41% of potential customers). In MENA, consumers are also required to jump through several hoops across the purchase journey, including lack of guarantees (45%) and shipping delays (47%). In Central Asia, on the other hand, consumers who hesitate to buy online tend to avoid making purchases without a warranty - a concern that's 10% higher than the global average.

Asia and MENA expressed unfamiliarity/not knowing how to shop online as the main hold-back, with a respective 50% and 45% more people than the global average saying they don't know how to buy online. At the same time, MENA consumers perceive the shopping process as long and complicated (26% vs the global average).

Distrust in a brand prevents about 50% of Latin Americans from making online purchases

Factors that prevent online purchases, by region

Shipping delays

53% Africa
47% MENA
44% Asia

43% WW

43% Latam
40% Nordics
39% Balkans
38% CA
36% Baltics
29% CE

Distrust
(delay in responding, bad rates, etc.)

50% Latam
44% Africa
44% Balkans
44% CA

43% WW

43% Baltics
39% MENA
38% Nordics
34% CE
32% Asia

Being redirected
(to another site during the process)

34% Africa
32% Latam
29% CA

28% WW

27% Baltics
26% Balkans
26% MENA
25% CE
24% Asia
22% Nordics

Shipping coverage
(delivery does not reach my home)

31% Latam
31% Africa
30% Nordics
29% MENA
29% Asia

27% WW

23% CE
23% CA
21% Baltics
18% Balkans

Unfamiliarity
(Not knowing how to do it)

23% Asia
22% MENA
16% Africa
16% Nordics

15% WW

14% Latam
13% Baltics
11% CA
9% CE
8% Balkans

Ask Aleph:

Prioritize convenience, promotions and adapting to regional needs

In light of e-commerce's stellar growth and changing consumer preferences, brands should focus on optimizing convenience and promotional offers in their online strategies.

They can also build digital campaigns that spotlight these advantages and incorporate them into a user-centric shopping experience.

Marketers need to recognize that while online shopping behaviors differ by region, the universal expectation is a smooth, hiccup-free purchase experience. From LatAm's focus on payment options to Asia's emphasis on product customization, regional differences are significant and communications to articulate these benefits must be tailored.

Aleph Expert
Māris Naglis
Global VP of Customer Success
at Aleph Group, Inc

3.3 Adopting preferred payment methods

Given the popularity of online purchases and its acceleration since COVID-19, the number of payment methods available have soared. While payment methods should be clearly communicated on brand websites and apps, brands can also consider widely broadcasting any additional methods so consumers are aware of what's available to them.

The rise of virtual wallets

In Africa (28%), Asia (35%), and the Nordics (30%) virtual wallets have gained traction, with consumers in the three regions opting for the digital payment method 1.6x (on average) more frequently than the global average. All three regions cited '*ease of use*' as the primary reason for their preference, **with 40% of African respondents explaining that virtual wallets are easier to obtain.** This could in large part be due to the sizable informal economy in the region and/or strict requirements set by traditional banks. In

In Asia, on the other hand, 68% more users than the global average indicated that virtual wallets offer more benefits than other payment methods, largely attributed to the industry pioneers in the region.

Digital banks find their footing

Also gaining traction across several regions are cards issued by digital banks, which are run entirely online and have no physical presence. Africa is the most laggard in embracing this method, using it 2.5x less than the global average.

Cash gives way to debit and credit cards

When it comes to more traditional payment methods like cash, the Balkans are the last stronghold, utilizing them 1.8x more than the global average user. The most favored payment method worldwide are debit and credit cards. They have surpassed other payment options, with 45% of the world preferring it over other methods, except in Asia where virtual wallets reign.

Cryptocurrencies gaining traction

Cryptos stand out for the benefits they offer, with 45% deeming it better than other payment methods. Another 87% more than average appreciate the variety of products they provide. A key benefit of using cryptocurrencies is their decentralized nature, which means transactions can take place without any geographical restrictions.And, since traditional banking systems don't apply, it offers its users much more flexibility. In combination with low transaction fees and anonymity, crypto is a popular mode of payment.

Debit and credit cards are the preferred payment method for

45%

of consumers globally

Adapting to change: the expansion of payment methods

Most often used payment method, by region

Nordics
- 52%
- 6%
- 7%
- 2%
- 30%

CE
- 40%
- 10%
- 30%
- 2%
- 14%

Balkans
- 43%
- 8%
- 39%
- 1%
- 7%

Baltics
- 58%
- 9%
- 13%
- 2%
- 14%

Asia
- 19%
- 12%
- 28%
- 5%
- 35%

LATAM
- 55%
- 11%
- 16%
- 1%
- 14%

MENA
- 34%
- 11%
- 27%
- 5%
- 21%

Africa
- 51%
- 4%
- 11%
- 3%
- 28%

CA
- 49%
- 12%
- 17%
- 2%
- 13%

WW
- 45%
- 10%
- 21%
- 2%
- 19%

Legend:
- Debit/Credit card in a traditional bank
- Digital bank card
- Cash
- Cryptocurrency
- Virtual wallets/Digital cards

Aleph Media Essentials 2024. WW (N=23400), Africa (N=3000), Asia (N=3200), Balkans (N=3200), Baltics (N=2400), CE/Central Europe (N=800), CA / Central Asia (N=800), LATAM (N=6200), MENA (N=2800), Nordics (N=1000)

Reasons for choosing preferred payment methods

Legend:
- Debit/Credit card in a traditional bank
- Virtual wallets/ Digital cards
- Digital bank card
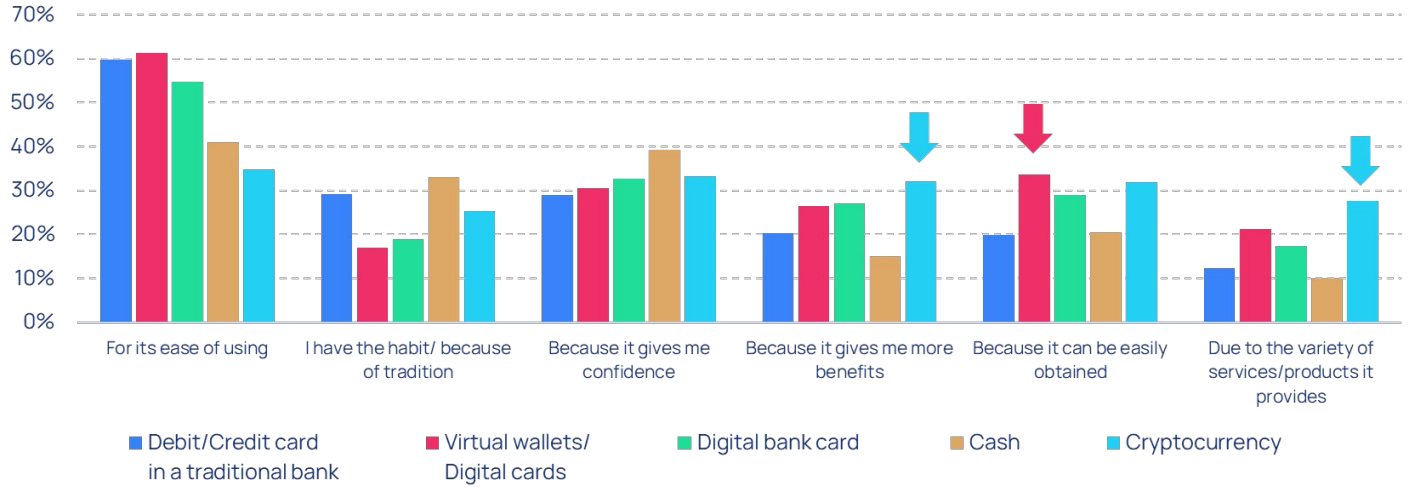- Cash
- Cryptocurrency

Aleph Global Media Essentials 2023: All N=23.400.

In light of the evolving payment landscape, brands should offer the payment methods most relevant to their target markets if they want to stay relevant. With the rising popularity of virtual wallets, particularly in regions like Africa, Asia, and the Nordics, it's crucial to highlight the 'ease of use' and accessibility of this payment method. Digital banks, though gaining ground, might require additional attention in regions like Africa. Debit and credit cards remain universally favored while cryptocurrencies are gaining traction globally. Brands can enhance convenience and boost sales by offering a combination of payment methods.

3.4 Embracing shopping events and seasons

Over the last five years, shopping festivals have propelled e-commerce to new heights.. Be it Ramadan in MENA, Singles' Day in Asia, or Black Friday around the globe, shopping seasons are a prime opportunity to create buzz and drive awareness, to keep your brand top of mind, and of course, to boost sales.

MENA and Asian consumers are 1.6x more likely to be excited for sale seasons and are more likely to make purchases

In MENA and Asia, customers are 1.6x more likely to get excited about discount periods than the average global user and are most likely to buy more during shopping seasons. They also tend to pre-add items to their shopping carts in the lead up to the sale event. Brands wanting to tap into this opportunity can build anticipation by boosting their marketing efforts three to four weeks before the start of the sale event and maintaining frequent communication throughout the event. Adding a countdown clock on their website or social media platforms, sending out regular emails or notifications to alert consumers of the latest deals, or introducing partnerships with influencers and experts are all great ways to hype up the event.
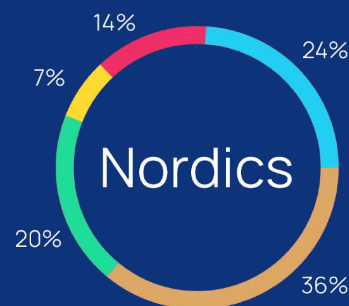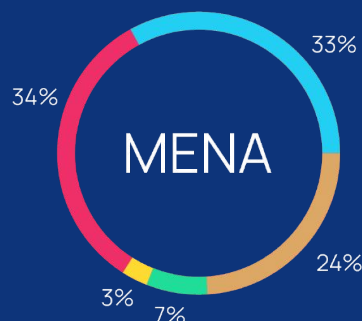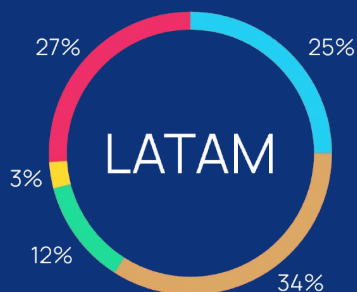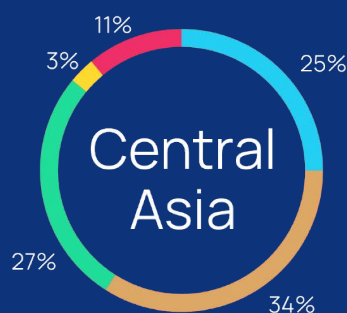
Globally, 30% or more of users (outside of MENA and Asia) are not familiar with shopping seasons, but would make purchases if offers and discounts are enticing enough. Marketers should capitalize on this by engaging consumers who are receptive and open to such occasions but who might otherwise go unnoticed in busy shopping seasons.

To fully grasp the opportunity, marketers need to prepare for the shopping season well in advance. Sales events can be short-lived, but planning for them can take months. In the lead up to the year's biggest events, brands can consider implementing engaging contests, like quizzes, polls, or games with prizes and offers that are unveiled throughout the event. Social media can also be leveraged to send reminders in the form of pre-roll videos and notifications to remind customers of the upcoming discount season, and to provide sneak peeks and exclusive early access for loyal customers. Interactive shopping experiences, such as 'try-on' features using AR lenses and cart browsing, can encourage customers to spend more time on the platform and make more informed purchasing decisions. Additionally, loyalty programs that grant members early access to sales or extra discounts not only drive purchases during the discount season, but can also foster long-term customer loyalty.

Behaviors during the online shopping seasons

Legend:
- 🔴 I always make purchases during the online shopping season
- 🔵 I tend to wait for these days to buy/delay purchases waiting for offers
- 🟤 I am not actively aware, but if there is a good offer: I buy the product
- 🟢 I'm not very involved in these events
- 🟡 I'm not interested at all
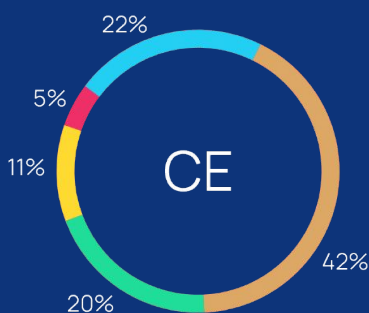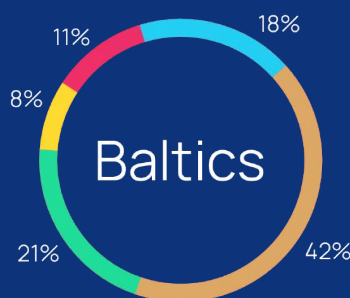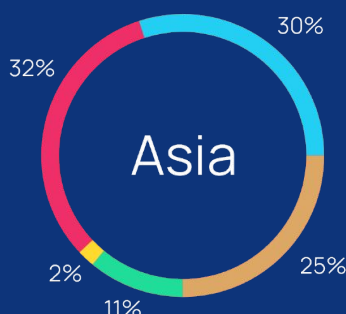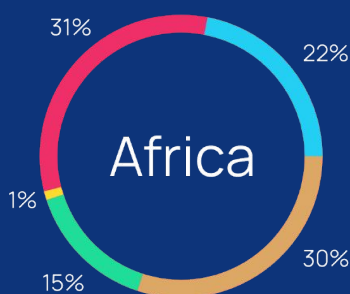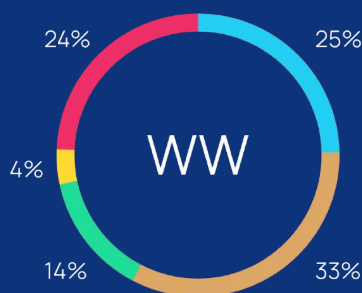
WW
- 25% (wait)
- 33% (good offer)
- 14% (not involved)
- 4% (not interested)
- 24% (always)

Africa
- 22% (wait)
- 30% (good offer)
- 15% (not involved)
- 1% (not interested)
- 31% (always)

Asia
- 30% (wait)
- 25% (good offer)
- 11% (not involved)
- 2% (not interested)
- 32% (always)

Balkans
- 23% (wait)
- 44% (good offer)
- 17% (not involved)
- 3% (not interested)
- 12% (always)

Baltics
- 18% (wait)
- 42% (good offer)
- 21% (not involved)
- 8% (not interested)
- 11% (always)

CE
- 22% (wait)
- 42% (good offer)
- 20% (not involved)
- 11% (not interested)
- 5% (always)

Central Asia
- 25% (wait)
- 34% (good offer)
- 27% (not involved)
- 3% (not interested)
- 11% (always)

LATAM
- 25% (wait)
- 34% (good offer)
- 12% (not involved)
- 3% (not interested)
- 27% (always)

MENA
- 33% (wait)
- 24% (good offer)
- 7% (not involved)
- 3% (not interested)
- 34% (always)

Nordics
- 24% (wait)
- 36% (good offer)
- 20% (not involved)
- 7% (not interested)
- 14% (always)
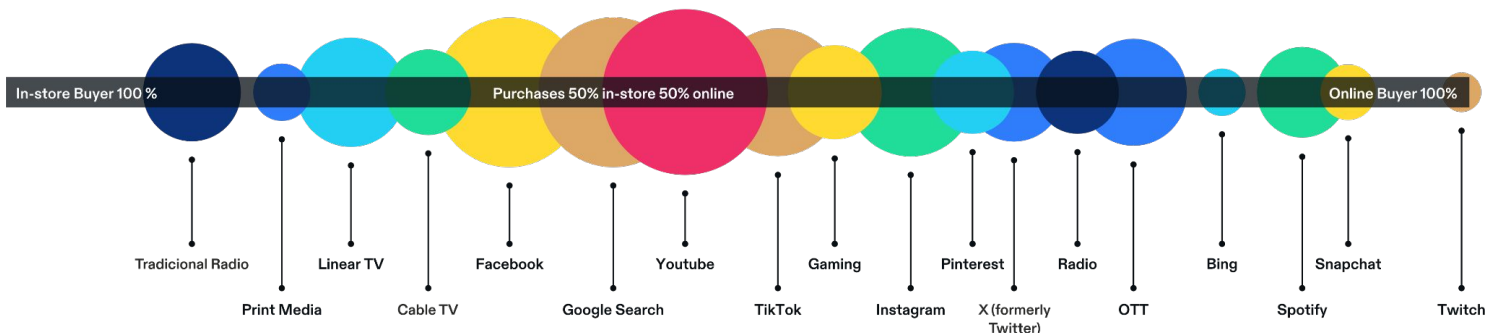
More involved ↑ / Les involved ↓

3.5 Media channels that trigger purchases

As brands improve their in-store and online assets, regular communication across the omnichannel path to purchase is fundamental to keeping customers engaged and informed. It fosters trust in the brand and ensures they remain top-of-mind when the consumer is ready to buy. Consistency in communication also helps businesses gather valuable insights on their customers' needs and behaviors, enabling them to tailor their offerings and address issues promptly.

To that end understanding which media channels influence purchasing decisions can help brands unlock new opportunities. Our research shows that on one end of the spectrum, a strong correlation exists between traditional offline media consumers and the likelihood they shop in physical stores. On the other end, **four specific digital media emerge as the preferred platforms for heavy digital shoppers who buy more than 75% of their purchases online: Twitch, Spotify, Microsoft Bing, and Snapchat.**

Media Consumption by type of consumer

In-store Buyer 100% — Purchases 50% in-store 50% online — Online Buyer 100%

Tradicional Radio · Print Media · Linear TV · Cable TV · Facebook · Google Search · Youtube · TikTok · Gaming · Instagram · Pinterest · X (formerly Twitter) · Radio · OTT · Bing · Spotify · Snapchat · Twitch

Note: The size of the bubble corresponds to the media reach. The position is determined by the media preferences of that consumer

Note: Media affinity is calculated as % of people interested in a particular media among the target group / % of people interested in a particular media among the entire population. In this case, it's (% of media consumption in each shopper profile / % of media consumption on average)*100, meaning the higher the value, the better the media fit with a specific type of buyer.

Meanwhile, intermediate digital buyers, those who shop half online and half offline, tend to gravitate towards OTT platforms, LinkedIn, 𝕏 (formerly Twitter), Pinterest, Instagram, Mobile Gaming Apps, and TikTok.

Based on these groupings, marketers can choose the most suitable advertising channels and create campaigns that are authentic to both the platform and to their brand identity.

Diving even deeper into the data, our research examined their impact at the two extremities: on **Heavy Online Shoppers** (who conduct over 75% of their purchases online) and **Heavy In-Store Shoppers** (who buy 75% or more in physical stores)- on the premise that digital media only gets even more effective on the scale towards Heavy Online Shoppers.

Interestingly, digital media has proven to be more effective at driving purchasing decisions, regardless of whether the person is an online or in-store shopper.

Media with the greatest influence on purchase decisions

● Heavy Online Shoppers   ● Heavy In-store Shoppers

	Social media	**+16%**	32%	27%	
	TV		12%	25%	**+109%**
	Online video (pre-rolls)	**+49%**	17%	12%	
	Search engines		11%	9%	
	Websites		7%	5%	

Note:
Heavy Online Shoppers = +75% of their purchases are online.
Heavy In-Store Shoppers: +75% of their purchases are in physical stores.

Social media has the greatest influence on both Heavy Online Shoppers and Heavy In-store Shoppers

Ask Aleph:

Leverage the power of social media to sway online and in-store shoppers

Advertisers targeting Heavy Online Shoppers should consider leveraging social media and video ads with the intention of delivering strong call-to-action. Social media platforms like TikTok, Instagram, Snapchat, and video-first platforms like YouTube or Twitch are top-of-mind, used globally, around the clock, with an undeniable pull on those who shop online the most. Offline media just won't work for these people.

Even for campaigns targeting Heavy In-store Buyers, social media is the top influencer for 27% of consumers, making it the most influential medium for driving purchases even among this offline-focused group.

Ultimately, it's key to know your target audience's needs and wants, including their purchase behaviors, and to choose the right mix of media that speaks to that.

Aleph Expert
Anton Krasun
Global VP of Growth at
Aleph Group, Inc

Implications for marketers

1

Embrace the omnichannel experience. Today's consumers move fluidly between online and offline shopping. More than half make a majority of their purchases online, often checking prices and products beforehand. The trend of researching online to buy offline is growing, with people using smartphones even while in stores. Given that 3 in 4 consumers use phones for in-store research or to purchase a product, brands should merge their digital and in-store experiences to optimize the shopping journey.

2

Optimize the e-commerce shopping experience. Making your e-commerce platform user-friendly, convenient, and frictionless is essential to attracting and retaining customers. Continuously enhance the experience by providing services that customers desire the most and by removing any barriers to online shopping. For example, use tools like AR or Snapchat lenses to boost confidence in purchases and reduce returns.

3

Customer preferences for e- commerce success. Brands desiring e-commerce success must align with customer preferences. Understanding regional triggers and deterrents is crucial. While price comparison is universal, Asia and MENA prioritize convenience and quality. Free shipping, fast delivery, and varied payment methods are key. Brands must tackle distrust, delays, and embrace new payments for better targeting.

4

Shopping seasons. Shopping festivals, especially in MENA and Asia, have significantly accelerated e-commerce growth. To seize the opportunity, brands should prepare well in advance for the shopping seasons and build anticipation through marketing efforts. Implementing countdowns, engaging contests, utilizing social media for reminders and sneak peeks, and encouraging interactive shopping experiences can help boost sales during discount seasons.

5

Media channels that influence purchases. Marketers should focus on the channels that have the most influence on their audience's shopping habits and preferences. Our study shows that digital media holds the most sway for both Heavy Online Shoppers and Heavy In-Store Shoppers, with social media and pre-roll videos being the most effective channels.

Conclusions

The evolving consumer landscape demands constant vigilance and adaptation from marketers. Understanding shifts and their impact on consumer behavior is pivotal.

In this 4th edition of the Media Essentials report, we set out to fulfill the need for robust, local consumer insights, diving deeper into consumer media, advertising and shopping habits across 30 growth markets. Despite burgeoning internet adoption and digital media consumption, the disparity between digital advertising spend and usage has remainedsky-high. We therefore hope that this report will arm you with the data and insights necessary to seize the digital opportunities at hand, guiding and shaping your marketing strategies for 2024 and beyond.

Whether you are a traditional SMB wanting to experiment with digital advertising or a regional digital native advertiser looking to expand your footprint, Aleph's team of experts is on-hand to support your ambitions of reaching and engaging consumers in over 130 countries worldwide.

To gain a deeper understanding of the latest trends in digital advertising and to delve into further insights, feel free to contact us at media-essentials@alephholding.com. Let's together explore how these insights can propel your marketing strategy to new heights.

We are here to support you.

The Aleph team

About Aleph

Aleph Group, Inc is an ecosystem of global digital experts and technology-driven solutions that enables the growth of digital marketing. We connect thousands of advertisers with billions of consumers and create markets for local businesses to grow through digital advertising. Aleph is active in more than 130 primarily emerging countries and helps advertisers engage with consumers on over 45 of the world's leading digital platforms, such as Google, Meta, Microsoft, Pinterest, Reddit, Snap, Spotify, TikTok, Twitch, Uber, 𝕏 (formerly Twitter) and others.

Through tailored solutions built on proprietary technology, through our local teams, we provide media partnerships, proprietary ad tech solutions, digital advertising education and cross-border payment solutions. We excel in expanding into unfamiliar territories and navigating local and central bank regulations Through Aleph Payments, our cross border credit underwriting & payments service, we simplify complexities from KYC, local billing in 49 currencies, collections, tax settlement, exchange settlement, cross-border credits and payments allowing businesses to focus on their main business operations.
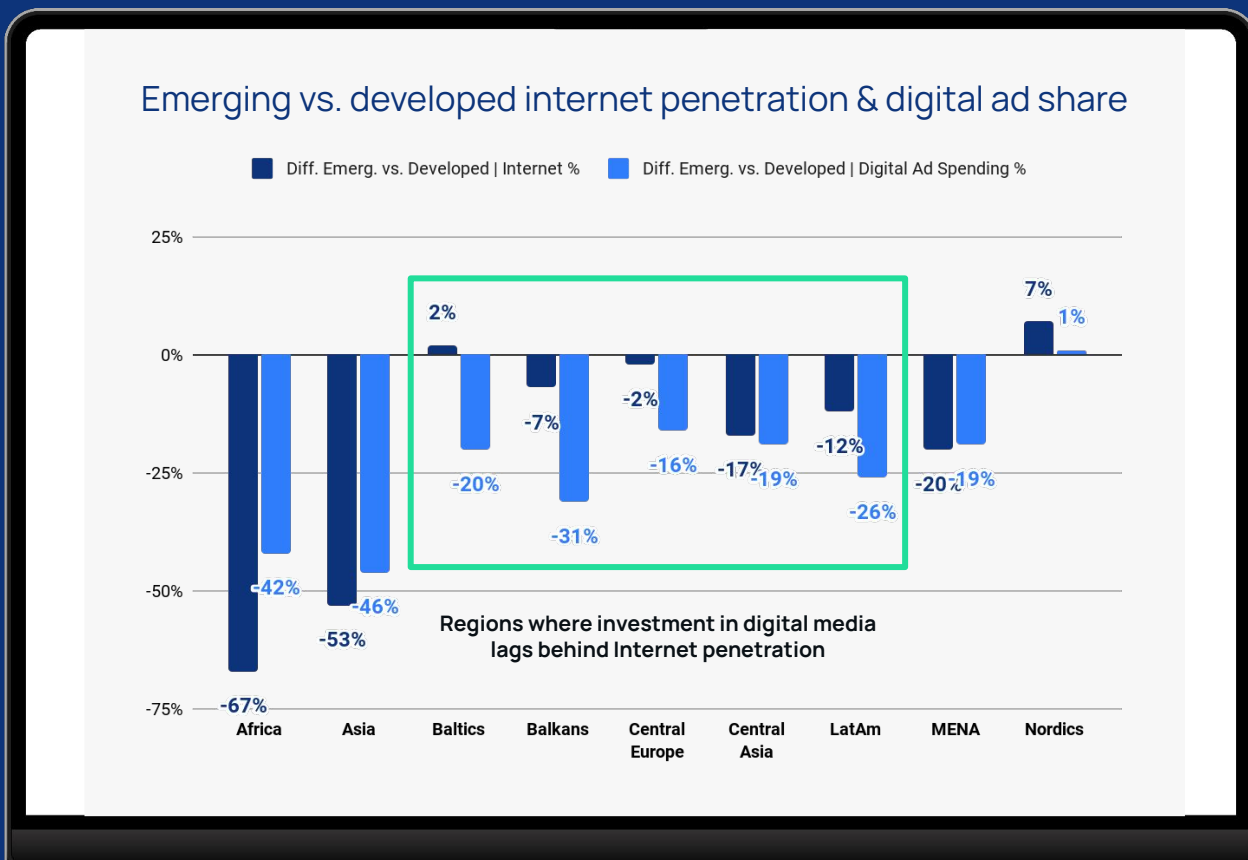
Aleph was established in 2021 after evolving from IMS' birth in 2005, and continues to be led by its founding CEO, Gaston Taratuta, EY Entrepreneur of the World 2022, with a vision to accelerate the global shift from offline to online and drive long-term economic growth. To support this shift, Aleph launched its own social initiative, Digital Ad Expert, which is on a mission to create economic opportunities through digital advertising education.

Aleph's approach has been highly successful to date. In recent years, the Group has scaled up to more than 1,600 employees in 65+ offices across 5 continents and has secured investment from institutional partners including CVC Partners, Mercado Libre, Sony, 𝕏 (formerly Twitter), and Snap.

Appendix

Emerging vs. developed internet penetration & digital ad share

■ Diff. Emerg. vs. Developed | Internet %   ■ Diff. Emerg. vs. Developed | Digital Ad Spending %

Africa: -67%, -42%
Asia: -53%, -46%
Baltics: 2%, -20%
Balkans: -7%, -31%
Central Europe: -2%, -16%
Central Asia: -17%, -19%
LatAm: -12%, -26%
MENA: -20%, -19%
Nordics: 7%, 1%

Regions where investment in digital media lags behind Internet penetration

Sources:
Ad spending by Statista and eMarketer, 2023 figures.
Internet Penetration by Economist Intelligence Unit for 2023. Countries categorization by World Bank.
Note: Asia excludes China.