globalwebindex

GWI Social

• Q2 2014 •

GlobalWebIndex's quarterly report on the latest trends in social network usage and engagement

Index

Introduction

GWI Social is where GlobalWebIndex presents the very latest figures for social media usage and engagement across more than 30 global markets.

In this edition, we draw on data from our Q1 2014 wave of research to:

- Identify the most popular social networks in 2014
- Track rates of growth over the last six months
- Quantify the importance of mobiles, tablets and messaging apps to social networking
- Examine networking by age, with special focus on the behaviors of teens and 16-24s.

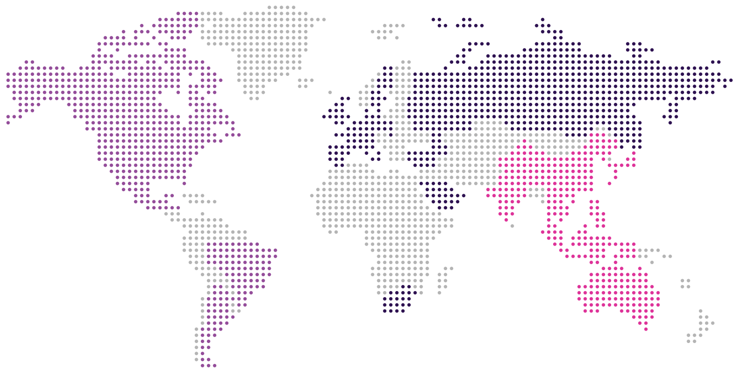
By analyzing such recent and robust data – which is representative of nearly 90% of the global internet audience – we are able to cut through the headlines and hype to provide a unique understanding of what's actually happening within the social media landscape.

Clients can access further detail on any of the topics covered in this report through our pre-cut data packs available to download in the Insight Store, or by analyzing them against target audiences in our PRO platform.

For social trends at a national level, please see our new Market Reports – each of which contains a section dedicated to networking platforms and behaviors.

Notes on Methodology

Each year, GWI interviews more than **170,000 internet users across 32 markets** – making it the largest on-going study into the digital consumer instigated to date.



AMERICAS
US / Canada / Mexico / Brazil / Argentina

EMEA
UK / Ireland / France / Germany / Italy / Spain / Netherlands / Poland / Turkey / Russia / Sweden / Saudi Arabia / UAE / South Africa

APAC
China / Hong Kong / Singapore / India / Indonesia / Japan / Taiwan / Vietnam /Thailand / Malaysia / South Korea / Australia / Philippines

Research is conducted in quarterly waves, each of which has a global sample size of more than 40,000 internet users. In each country, we typically interview between 3,000 and 4,000 people every year, although the sample size is larger in key markets such as the UK and the US (30,000 each). Data is collected in the last six weeks of every quarter, ensuring it is as up-to-date as possible.

Respondents complete an **online questionnaire** that uses stratified sampling techniques to ensure that they are **representative of the internet population aged 16 to 64** in each country (with correct proportions in terms of gender, age and educational attainment).

This data is also used to calculate the **universe estimates** which we present throughout this report. Universe figures are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

GWI's Usage Definitions

We measure three forms of engagement with social platforms, defined as follows:

- **Account Ownership –** those who claim to have an account on a social network
- **Visitation –** those who claim to have visited the network in question in the last month (via any device)
- **Active Usage –** those who have an account and say they have used or contributed to the network in the last month (via any device)

These definitions are consistent across all of the platforms we track and thus allow accurate comparisons between networks. In contrast, self-published figures from social networks tend to use a wide and competing range of factors, but would typically utilize 'Visitation' as a definition of 'Active Usage'. To see an example of this and explore GWI's numbers in more detail, please download the *Understanding Facebook's User Numbers* trend from the Insight Store.

China

It's clear that large numbers in China are connecting to major social platforms via VPNs, Proxy Servers and other tools – something we address in the charts dedicated to Chinese social networking and which we explore further in our Market Report on China's internet population.

However, due to the sheer scale of the Chinese market, its high number of local social networks and the official restrictions it places on platforms such as Facebook and Twitter, **China is excluded from most of the global charts presented in this report** (see the base of each one for confirmation).

Elsewhere, a small delay in fieldwork means that Q1 2014 data on usage of specific apps in Japan was not available at time of writing; this country has therefore been excluded from Charts 10, 11 and 19.

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KEY TRENDS AND IMPLICATIONS

Key Trends and Numbers

- Globally, **Facebook is still the top social network –** and by quite some distance. Outside of China, an impressive 82% of internet users aged 16-64 now have a Facebook account. By Q1 2014, it had more members and monthly visitors than it did at the start of 2013, indicating that its overall reach continues to increase.

- **Active usage of Facebook continues to slip, however:** 48% of the online population outside of China say that they actively use or contribute to the site each month – down 6% over the last six months. This still puts it appreciably ahead of all other platforms (many of which have also seen small decreases) and is a reflection of **networking becoming more "passive" in character;** driven in particular by the rise of mobiles and messaging services, people are still visiting the big sites like Facebook but are carrying fewer actions once there.

- Three platforms compete for second position behind Facebook: **Google+, YouTube and Twitter. Google+ has been performing especially well in emerging internet markets** and has seen a 10% increase in account holders over the last year. **YouTube tends to take second place in mature internet markets** and is posting especially strong figures for mobile engagement. And **Twitter, which overtakes Facebook to claim first place in Japan,** has seen a 7% increase in account members in the last twelve months.

- It's on the newer, more niche or seemingly "cooler" platforms where growth in active usage is occurring. **Instagram is the fastest rising social platform overall** (with a 25% increase in active user numbers in the last six months), while **Tumblr** and **Pinterest** also recorded solid rises. These platforms are among the only ones where 16-24s form the biggest share of active users, whereas 25-34s are the leading group on sites like Facebook.

- Mobiles and tablets continue to become more and more important as networking devices. Overall, 40% and 16% of internet users aged 16-64 are now using them to connect to social platforms – **representing increases in audience sizes over the last year of 33% for mobiles and 94% for tablets.**

- All social apps – and messaging services in particular – experienced growth in the last six months. **Snapchat is the biggest climber of all (+67%);** its total user base remains relatively small but it is performing particularly well in the US, UK, Ireland and Australia and has enjoyed an especially strong rise among teens (+95%). **WhatsApp – Facebook's recent acquisition – has seen a healthy increase too (+30%);** it is used by just 3% in the US but a substantial 50%+ in nations such as Hong Kong, South Africa and Malaysia.

- **Social networking in China is dominated by Qzone, Sina Weibo and Tencent Weibo** – all of which can boast account membership levels of 75%+. In the app space, it is **WeChat which leads:** 73% of the online population aged 16-64 say that they have used it in the last month. But major global platforms like Facebook and Twitter have significant Chinese audiences too – with 58% of VPN users in the country saying they use them in order to access prohibited social networks.

Key Implications

- **Social networking has become a truly multi-device behavior.** To put this in context, just 2% of people who accessed Facebook via a mobile during Q1 2014 did not also visit the site via another device (e.g. a PC, laptop or tablet). It's essential to recognize that the same users will be visiting sites across a range of different devices.

- However, with all of the major social behaviors tracked by GWI recording growing mobile audience sizes, it's clear that **networking is developing a strengthening mobile-first character.** It's here that we'll see the biggest growth in 2014 and beyond, something which places still more importance on the development of effective mobile advertising solutions.

- **Social platforms offer truly global reach,** being mainstream in both mature and emerging internet nations alike. But with users typically most engaged with networking in the fast-growth markets, any investment decision should not be based solely on national internet penetration rates. Indeed, many countries with low overall penetration levels have large and highly active social audiences (which typically contain high proportions of urban and relatively affluent consumers).

- Globally, **accessing the internet via VPNs and Proxy Servers has become a major phenomenon.** Some 28% of internet users claim to have done this, with just over 40% of this group saying that one of their motivations is to access social platforms. This has major implications for how these users are geo-located – especially as a significant number say that the server they use is located in US. As a result, **social audiences in America can be significantly over-estimated by web analytics, whereas those in fast-emerging markets can be under-represented.**

- **Social networking is becoming more passive in character.** People are not leaving platforms – and are still visiting them in large numbers – but they are carrying out fewer actions once there. In short, users are becoming more likely to look at newsfeeds rather than actively interact with them – a trend being driven by the continuing rise of mobile devices as well as a shift to messaging services for one-to-one communication. It's clearly significant that, on a site like Facebook, more people are now sharing photos than commenting on posts or messaging friends. But this is not a cause for alarm; as Facebook's recent results show, **mobile advertising solutions depend on reaching specific audiences/ users and can still be highly profitable despite a more passive form of engagement.** Indeed, Facebook's launch of a new in-app advertising system will allow it to target individuals regardless of whether or not they are visiting the main site itself.

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TOPLINE TRENDS

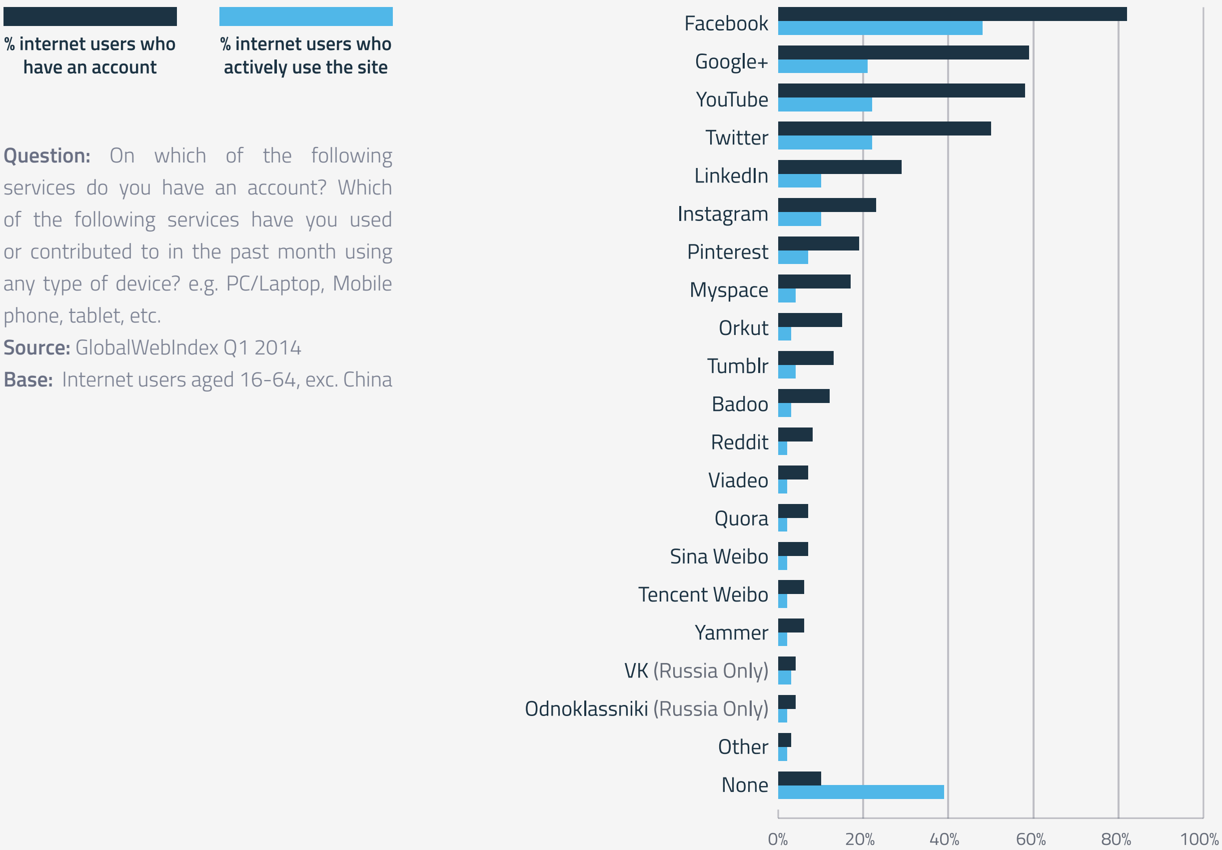
Tracking the most popular platforms at a global level

Key Headlines

- Facebook is still the top social network, with the most members, visitors and active users.
- In most markets, Google+ and YouTube compete for second position – with the former doing particularly well in emerging internet nations.
- Both Google+ and Twitter have added significant numbers of new members in the last year, although Instagram remains the fastest-growing platform in terms of active usage.
- Over a quarter of internet users are going online via VPNs and Proxy Servers, with nearly half of this group looking to access sites like Facebook and Twitter.

Facebook Still in Pole Position

CHART 1: **Top 20 Social Platforms - Account Ownership and Active Usage**



Question: On which of the following services do you have an account? Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, tablet, etc.

Source: GlobalWebIndex Q1 2014

Base: Internet users aged 16-64, exc. China

Facebook remains the number one social network from a global perspective – and by quite some distance (Chart 1).

In terms of account ownership – i.e. the number of internet users who claim to have an account on the site – **the figure for Facebook is an impressive 82%.** This percentage has remained stable over the last year and corresponds to more than 860 million people aged 16-64 outside of China.

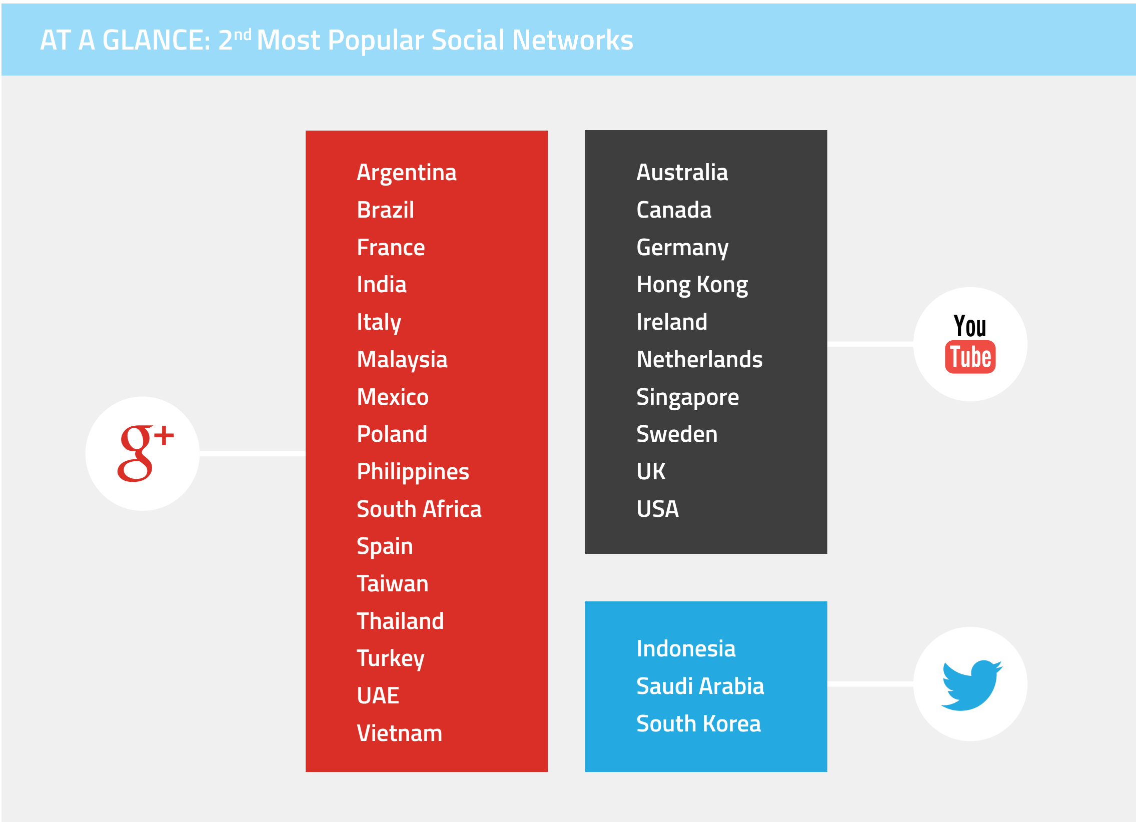
At a national level, **account ownership reaches its highest point in fast-emerging internet markets** such as Indonesia (96%), Mexico (95%) and Malaysia (94%). Virtually all internet users aged 16-64 in these countries are on Facebook – reflecting just how extensive and global the platform's reach has become.

Account ownership is a little lower in Facebook's home market of the US (82%), but this trend is replicated in several other mature internet nations too – dipping to 78% in the UK, 77% in Australia and 69% in Germany.

Overall, **there are just 3 of GWI's 32 markets where Facebook is not in pole position:** China (which we discuss below), Russia (where it faces strong competition from local platforms VK and Odnoklassniki) and Japan (where it is just behind Twitter). Japanese internet users are in fact some of the least enthusiastic about social networking more generally; only 34% have an account on Facebook, far below the levels seen elsewhere.

Google+ Most Popular in Emerging Internet Markets

In all of the nations where Facebook is the favorite network, there are three sites that compete for second position: Google+, YouTube and Twitter. We visualize this on a country-to-country basis below.



Broadly speaking, **Google+ tends to takes second place in fast-emerging internet markets –** nations which rarely feature prominently in social networking studies or receive the most investment in terms of campaigns. Just as significantly, **overall membership grew by 10% between Q1 2013 and Q1 2014** (from 49% to 59%). So, while Facebook account numbers have remained stable, Google+ is still adding new members.

With founder Vic Gundotra having recently announced his departure from the network, it's clear that he leaves Google+ with healthy account membership levels in all nations but with particularly strong figures in emerging markets (as well as in places like France and southern Europe). Indeed, the reach of the platform is still often under-estimated: **the continuing rise of Google+ reflects its importance as a social layer that connects Google services** and its success in establishing an alternative social model to those operated by sites like Facebook.

Elsewhere, **it is typically YouTube that comes second in the most developed internet nations –** a testament to the success of the site's attempts to sign people up as members instead of letting them browse anonymously. It also reflects the strong demand for bite-sized content among internet users.

Twitter rises to second position in just three markets but, along with Google+, it too has registered a solid increase in account numbers over the last year– up from 43% in Q1 2013 to 50% in Q1 2014. Its overall reach thus continues to grow and, as well as being the top social platform in Japan, more than two thirds of internet users in Indonesia, Saudi Arabia, Turkey, the UAE and India now have accounts.

It's also clear that **many people are visiting Twitter without being members/active users;** while 22% outside of China said they used or contributed to it in Q1 2014, a more substantial 38% of internet users aged 16-64 said they had visited it in some form during the same period. Within a social ecosystem where actions like sourcing content and accessing celebrities are becoming increasingly important, Twitter's positioning is a strong one.

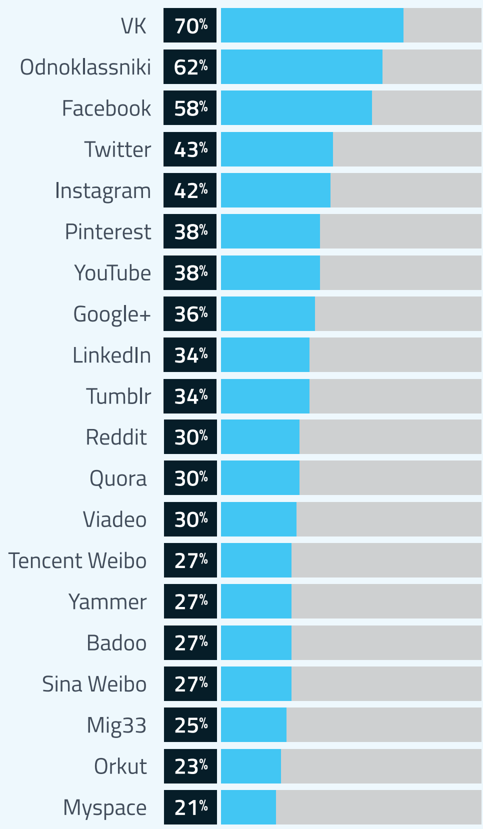
Finally, **Orkut's** presence in most markets is relatively minor but it has a much stronger footprint in India and Brazil: in both places, more than 50% of internet users aged 16-64 say that they have an account on the platform.

Active Usage: Facebook top

At GWI, one of the main ways we track engagement with social networks is by looking at their number of active users – defined as online individuals who claim to have actively used or contributed to a particular platform within the last month.

This is stricter than the definitions typically used by social networks in their own self-published figures, but GWI's methodology provides one of the most representative snapshots of how platforms are actually being used by online audiences on a day-to-day basis. This becomes clearest when we return to Chart 1 and examine those who choose the "none" option: whereas just 10% of internet users say that they don't have an account on any network, a much more significant 39% claim that they haven't actively used any social network within the last month. In short, **there are 29% of internet users who have accounts on social networks but who are using them only very infrequently, if at all.**

AT A GLANCE: Account Owners Actively Using Top 20 Social Platforms Each Month



% of Account Owners Actively Using Top 20 Social Platforms Each Month

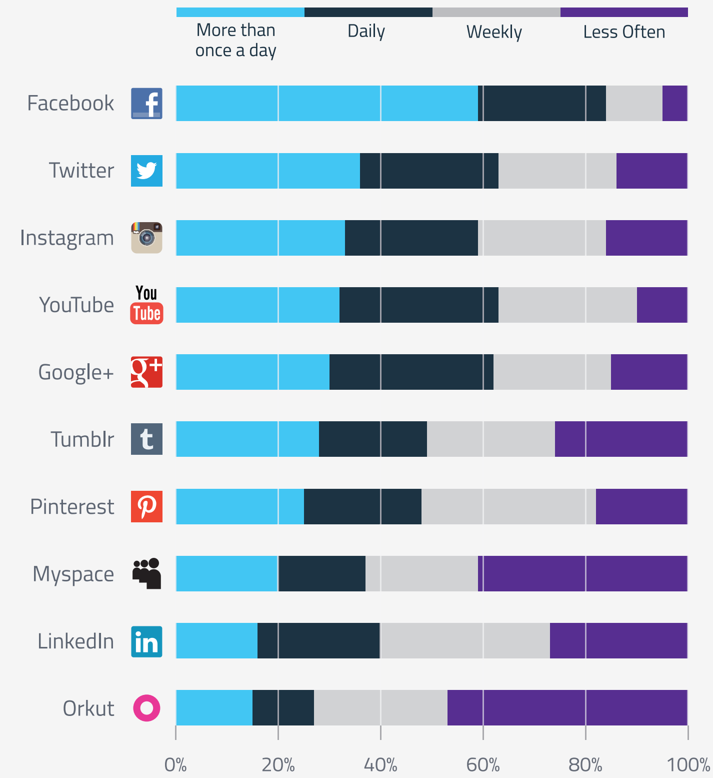
Across all of the platforms tracked by GWI, **Facebook is once again top of the list for active usage – with just under half (48%) of internet users using it each month.** Google+, YouTube and Twitter follow behind but the gap is now somewhat bigger than the situation for account ownership: outside of China, **Facebook's active user base is more than twice the size of that of any other network.** Instagram and LinkedIn post the next highest active usage figures (10% each), but most other global networks record figures of 5% or under. Clearly, then, it's the big four platforms which dominate proceedings, despite the social networking landscape having become increasingly diverse and competitive.

Facebook can also boast one of the most engaged membership bases; if we analyze the ratio of active users to account owners, its figure is 58% (that is, 58% of those with a Facebook account actively used it within the last month). Of the top 20 platforms, only Russian networks VK (70%) and Odnoklassniki (62%) have a ratio that is higher than this. Twitter also posts a healthy figure here (43%), but most platforms see figures of between 25% and 40%. Despite being one of the ten biggest platforms in terms of size, Myspace is the site that members are *least* likely to use.

Facebook the Most Frequently Visited Site

Facebook takes pole position once again when we analyze visit frequency: **its active users are the most likely to use the site multiple times a day** (Chart 2).

CHART 2: **Frequency of Visits on the Top 10 Social Platforms**



Question: Thinking about the social platforms that you use or contribute to each month, can you please tell us how often you typically use each one? /// **Source:** GlobalWebIndex Q1 2014 /// **Base:** Active users of each network aged 16-64, exc. China

Facebook can in fact boast that 95% of its active users engage with the site at least once a week. That the site is so far ahead of the other major networks reflects just how successfully it has cemented itself as a major go-to point and just how comprehensively it has integrated itself across the internet.

Compared to Q4 2013, there is however a small shift in evidence here: whereas the percentage visiting Facebook more than once a day has risen slightly, daily visitation has seen a corresponding drop. Visits are thus becoming more frequent. This reflects the impact of **increasing levels of usage via mobile;** people are logging in for numerous but relatively short sessions throughout the day. We discuss the rise of mobile networking further in the next chapter.

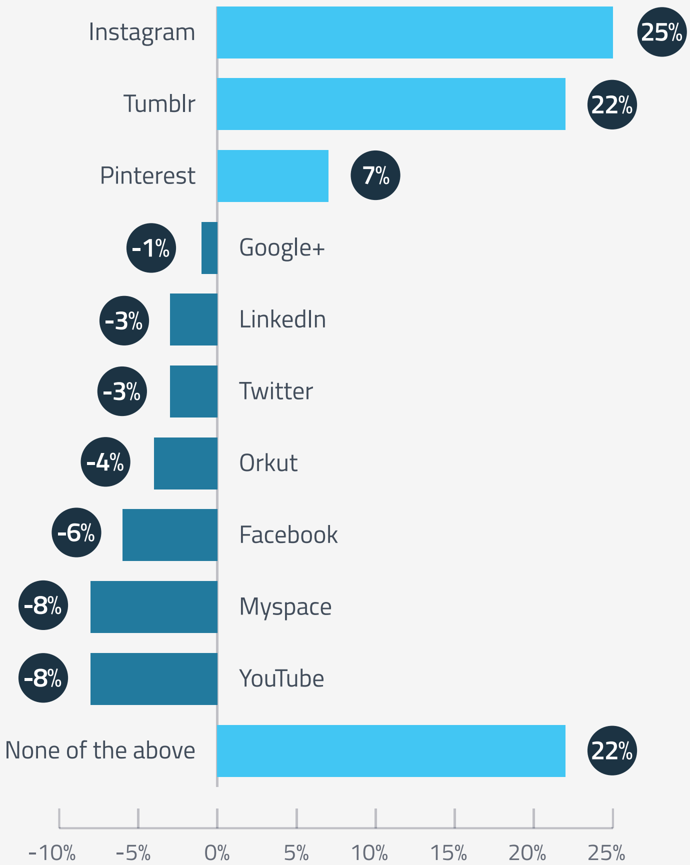
Elsewhere, about a third of active users on Twitter, Instagram, YouTube and Google+ are connecting several times a day; only small minorities of users on these platforms log on less than once a week.

The picture is quite different for networks such as Myspace and Orkut, though: visit frequency is much lower, with 41% and 47% of active users respectively selecting the "less often" option.

Active Usage: Instagram is the Fastest Growing Platform

Despite Facebook's dominance at a global level, a slightly different picture emerges if we analyze changes in active usage during the last six months – i.e. the numbers of people (in millions) who were regularly using the top ten social platforms in Q3 2013 vs Q1 2014 (Chart 3).

CHART 3: **Top 10 Social Platforms: Changes in Active Usage in Last Six Months**



Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/ Laptop, Mobile phone, tablet, etc. /// **Source:** GlobalWebIndex Q3 2013 - Q1 2014 /// **Base:** Internet users aged 16-64, exc. China

On this measure, **Facebook has seen a small decline of 6% – continuing a trend which emerged in early 2013.** However, it's far from alone: decreases during the last six months also occurred on Google+, LinkedIn, Twitter, Orkut, Myspace and YouTube.

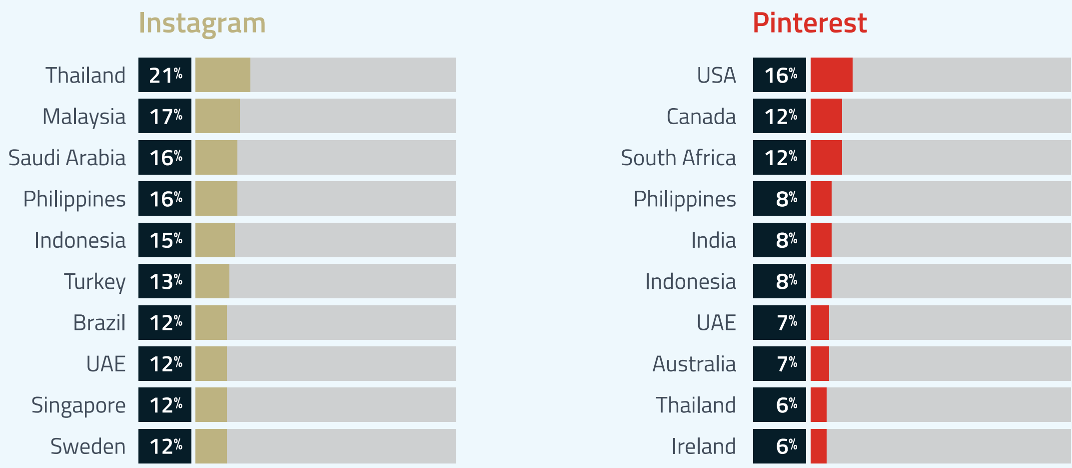
Over the same period, the numbers saying they haven't used any network within the last month have increased by 22%. All this indicates that **some of the largest networks are struggling to maintain interest levels among their membership bases;** in short, some users are experiencing a degree of social fatigue and others are beginning to use networks a little more passively.

In contrast, it's the **smaller and/or newer platforms that recorded increases during the last six months – with Facebook-owned Instagram posting the biggest rise of all** (up by 25% to pass 100 million active users aged 16-64 outside of China).

Tumblr and Pinterest are also up, as are a number of names outside of the top 10 – including Quora (+56%), Yammer (+39%), Reddit (+24%) and Viadeo (+22%). Chinese platforms Tencent Weibo and Sina Weibo posted growth too, rising by 35% and 29% respectively (particularly notable given that these figures exclude their home market of China).

Of course, it's important to note that these networks have much smaller user bases than the bigger players like Facebook. Excluding China, for example, Pinterest and Reddit now have around 75 million and 25 million active users aged 16-64 respectively, whereas Facebook can boast more than 500 million. Even so, **it's clearly on the smaller, newer or more niche networks where the growth is occurring.**

AT A GLANCE: Top Markets for Instagram and Pinterest



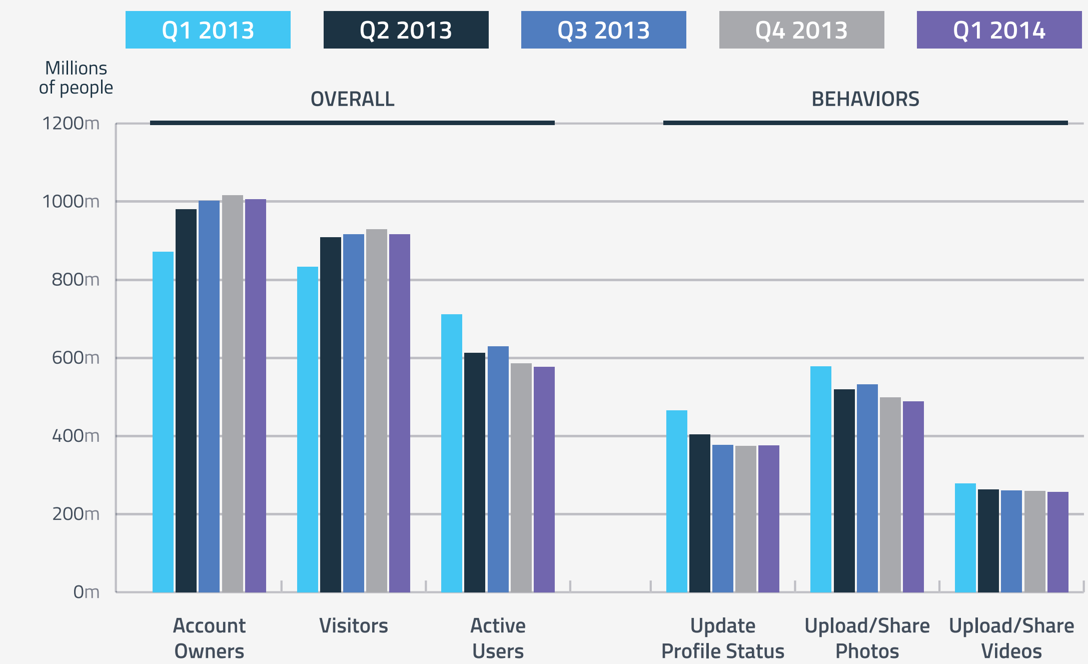
% Internet Users Active in Last Month (Average between Q3 2013 and Q1 2014)

Biggest Number of Active Users (Average between Q3 2013 and Q1 2014)

Social Networking Becoming More Passive

Across all of the biggest platforms, one trend remains constant: **social networking behaviors are becoming more passive in character.** Patterns on Facebook are a good illustration of this (Chart 4).

CHART 4: **Facebook: Key Figures and Behaviors**



Source: GlobalWebIndex Q1 2013 - Q1 2014 /// **Base:** Internet Users aged 16-64

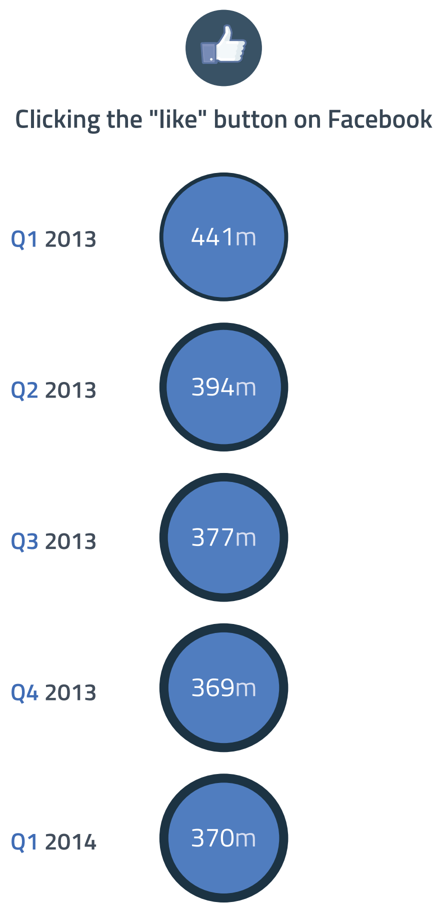
During the last year, Facebook's overall reach has continued to climb: despite a minor dip between Q4 2013 and Q1 2014, account membership and visitation are both trending upwards. So, more people have accounts on Facebook than a year ago, and more people are visiting the site each month.

But there's a change occurring in what people do on Facebook once they get there, with **active usage experiencing a pretty consistent quarter-on-quarter decline** over the last twelve months.

In a nutshell, people are still visiting Facebook but they are carrying out fewer actions than previously; networkers are looking at the site but are less likely to be contributing to or interacting with it. The same pattern can be seen for other major social networks such as Google+ and Twitter: figures for account ownership and visits are either growing or holding steady, but fewer people are actively using the sites.

If we return to Facebook, this trend finds further reflection through the declining numbers who are carrying out actions such as updating their status or uploading/sharing photos and videos – all of which have been fairly fundamental to Facebook as we have so far known it.

The same is true if we analyze the numbers who say they have clicked the "like" button in the past month; since Q1 2013, there has been a consistent decrease here.



Understanding GWI's user numbers for Facebook

GWI and Facebook have varying estimates surrounding the extent of active usage, with GWI's "visitors" figure being the closest proxy for Facebook's "active user" measure.

In Q4 2013, GWI's visitor number was 25% lower than Facebook's corresponding active user number (929 million vs. 1,229 million). This is a direct result of the different definitions that each applies, with GWI data representing 89% of the global internet audience and not including the following:

- **Duplicate accounts** (estimated by Facebook to represent between 4.3% and 7.9% of their worldwide monthly active users in 2013)
- **False accounts** (whether "user-misclassified accounts" or "undesirable accounts", estimated by Facebook to represent between 0.8%-2.1% and 0.4%-1.2% of worldwide monthly active users respectively).
- **Auto log-ins** (people who are automatically logged in to the service without actually using it, a common issue with mobile applications in particular; these users are counted as active by Facebook)
- **Third-Party Likers** (people who are signed in via a third-party website and click a "like" button but who are not actively using the main site itself; these users are counted as active by Facebook)
- **Incorrectly geo-located users** (Facebook notes that "data regarding the geographic location of our users is estimated based on a number of factors, such as the user's IP address and self-disclosed location. These factors may not always accurately reflect the user's actual location.")
- **Users under 16 or 65+**
- **Individuals who access the internet via a mobile *only*** (this group will be added to GWI's core survey during 2014)

Both datasets have their own merits but we believe that **one of the biggest strengths of GWI's figures is that they measure usage in terms of numbers of people rather than *users*.** They also show the numbers who perceive themselves to be using Facebook, as opposed to passively collected data which can incorrectly classify people into this group.

To explore this subject in more detail, please download the *Understanding Facebook's User Numbers* trend from the Insight Store.

To be clear, it's not that Facebook is hemorrhaging active users – far from it. The declines seen in the last year might be fairly consistent but their scale should not be over-exaggerated, especially given Facebook's enduring and impressive global reach. Yes, some users might be a little less engaged than they once were – an inevitable result of the site having been around for more than ten years. But a **shift to more passive types of engagement is also a natural consequence of Facebook's continuing migration to mobile;** on these devices, the newsfeed plays a more prominent role and visits are likely to be more frequent but slightly less involved (we discuss this further in the next chapter).

It's also crucial to note that increasing levels of passive usage does not limit growth in advertising revenue. The huge success of **Facebook FBX and mobile advertising solutions are underpinned by the proposition of reaching specific audiences or people;** as long as these users continue to visit the platform, revenues will follow. Facebook's plans to launch an in-app mobile ad network that can target users even outside of its domain is a significant development here; privacy concerns will need to be addressed but, as long as users can be pin-pointed to their device, it will matter much less whether or not they are visiting Facebook itself.

Social Networking in China: Qzone, Sina Weibo and Tencent Weibo dominate

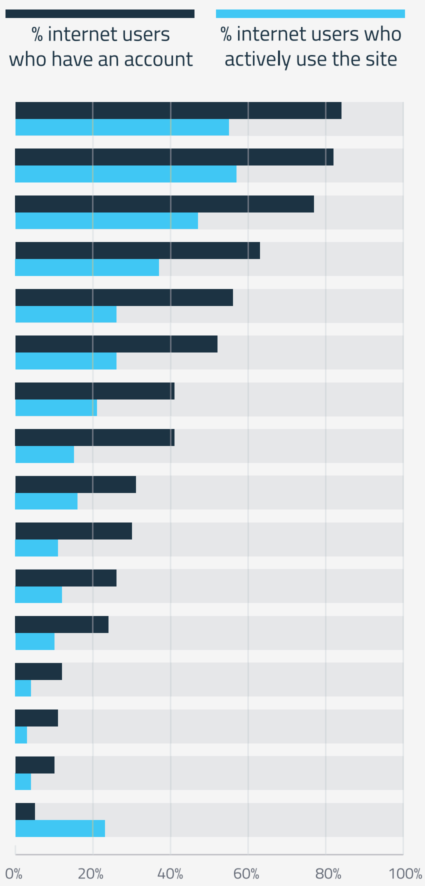
Of the 32 markets tracked by GWI, **China is one of the most socially engaged:** 95% of internet users aged 16-64 say that they have an account on a social network. Active usage is just as striking: the figure for China (77%) is surpassed only by the equivalent in Indonesia (79%).

Chinese networking is dominated by three platforms in particular: **more than three quarters have accounts on Qzone, Sina Weibo and Tencent Weibo, with about 50% actively using them each month** (Chart 5). The scale of the audience that this represents is huge: Sina Weibo is the most used platform of all at 57%, a figure which translates to around 265 million people aged 16-64.

Among the top 10 platforms, it was 51.com that recorded the biggest growth in active usage in the last six months – up by 9% to pass 50 million active users. Elsewhere, Youku, Qzone and Tudou all saw rises of 7% each. But while Tencent Weibo and Sina Weibo are growing their user bases in other markets, they saw small drops in China (-5% each). RenRen and Kaixin saw bigger falls of -11% and -20% respectively.

Overall, it's particularly noteworthy that 12 platforms in China are being regularly used by at least 10% of the online population; when an average is taken across the other 31 markets surveyed by GWI, only six networks can lay claim to this feat. Clearly, social networking in China is more mainstream, diverse and competitive than in many other nations.

CHART 5: **Top 15 Social Platforms in China - Account Ownership and Active Usage**



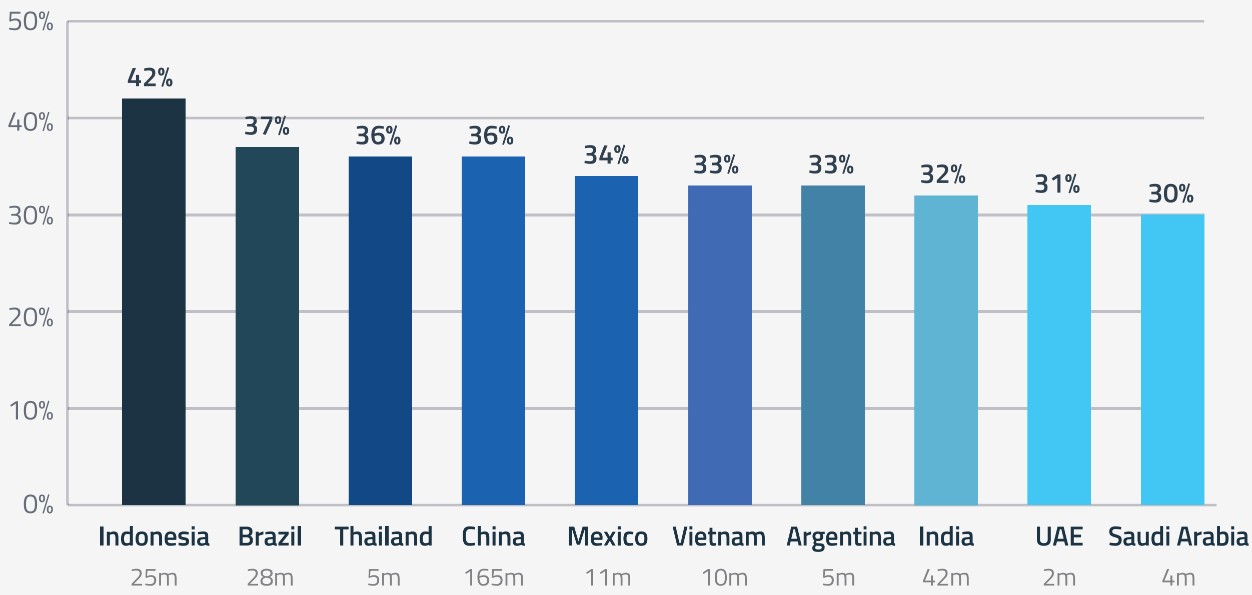
Question: On which of the following services do you have an account? Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/ Laptop, Mobile phone, tablet, etc. /// **Source:** GlobalWebIndex Q1 2014 /// **Base:** Internet users in China aged 16-64

VPNs: A Major Gateway to Social Networks

Despite official prohibitions on sites such as Facebook and Twitter, **large numbers of Chinese internet users are nevertheless accessing the major global networks.** Indeed, about 20% say that they are regularly using Google+, with around 15% connecting to Facebook and about 10% actively engaged with Twitter and YouTube. When converted to audience figures, this represents major – and typically overlooked – Chinese user bases for sites like Facebook.

There are a number of ways to bypass national restrictions placed on these sites, including accessing while at work, via apps and through VPNs or Proxy Servers. Usage of the latter is particularly pronounced among the Chinese online population: while 28% of internet users globally say that they have gone online using one of these tools, the figure climbs to 36% in China (Chart 6).

CHART 6: **Top 10 Markets for VPN Usage**



Question: When you access the internet, do you ever do so using a VPN (virtual private network) or proxy server? /// **Source:** GlobalWebIndex Q4 2013 - Q1 2014 /// **Base:** Internet Users aged 16-64

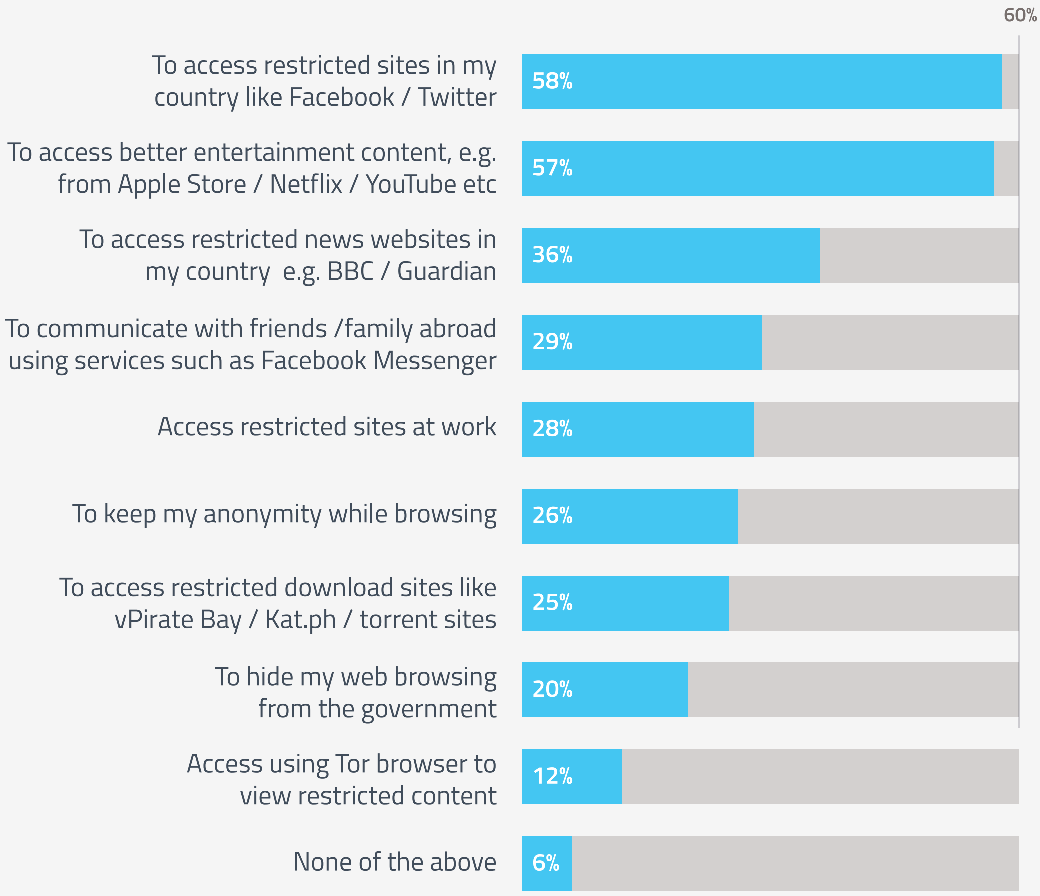
If we look at the motivations among this group, the importance of social networking is abundantly clear: **58% of Chinese VPN users say they use them in order to access restricted sites like Facebook and Twitter** – one of the highest figures seen in any of GWI's 32 markets (Chart 7). That's over 95 million people, many of whom will be incorrectly geo-located to other countries by web analytics.

Significantly, **19% of VPN users in China say that the server they use is located in the USA – one of the reasons why America has more than nine IP addresses for each internet user** (please see our white paper – The Missing Billion – to explore this subject in more detail).

A similar pattern is evident if we turn our attention to **Turkey** (where authorities attempted to block access to Twitter back in March). Although a slightly lower proportion of the Turkish internet population aged 16-64 are using VPNs than in China (29%), more than half of this group are doing so to access sites like Facebook and Twitter. That's nearly 3 million Turkish internet users connecting to social networks in this way – with the USA once again being the most common non-domestic location of the proxy server.

Not only does this trend underline the potential limitations of using passively collected, geo-located data – which can over-estimate the size of social audiences in markets such as the USA – it also emphasizes the **growing futility of attempting to prevent national audiences from accessing certain sites.** With rising awareness and usage of VPNs, Proxy Servers and similar tools, it's clear that they will represent an increasingly important access point for social networks.

CHART 7: **Top Reasons for VPN Usage in China**



Question: Can you please tell us why you use VPNs or proxy servers when browsing the internet? /// **Source:** GlobalWebIndex Q4 2013-Q1 2014 /// **Base:** VPN Users in China aged 16-64

For further analysis of the topics covered in this section, please download the following data packs from the Insight Store:

- *Account Ownership: Social Platforms*
- *Active Usage: Social Platforms*
- *Facebook Behaviors (PC, Mobile, Tablet)*
- *Website Visitation (PC, Mobile, Tablet)*
- *VPN and Proxy Server Usage*
- *VPNs and Proxy Servers: Usage Motivations*

4

DEVICE TRENDS

Understanding social behaviors across devices

Key Headlines

- The importance of mobile networking continues to rise, with multi-device usage of social platforms now standard. Significantly, while all of the top social behaviors are either steady or in decline via PCs/laptops, the numbers doing them on mobiles and tablets are rising quickly.
- Facebook is the top social app globally, but WeChat dominates in China.
- Snapchat was the fastest growing app in the last six months, with all of the messaging services tracked by GWI experiencing healthy rises.

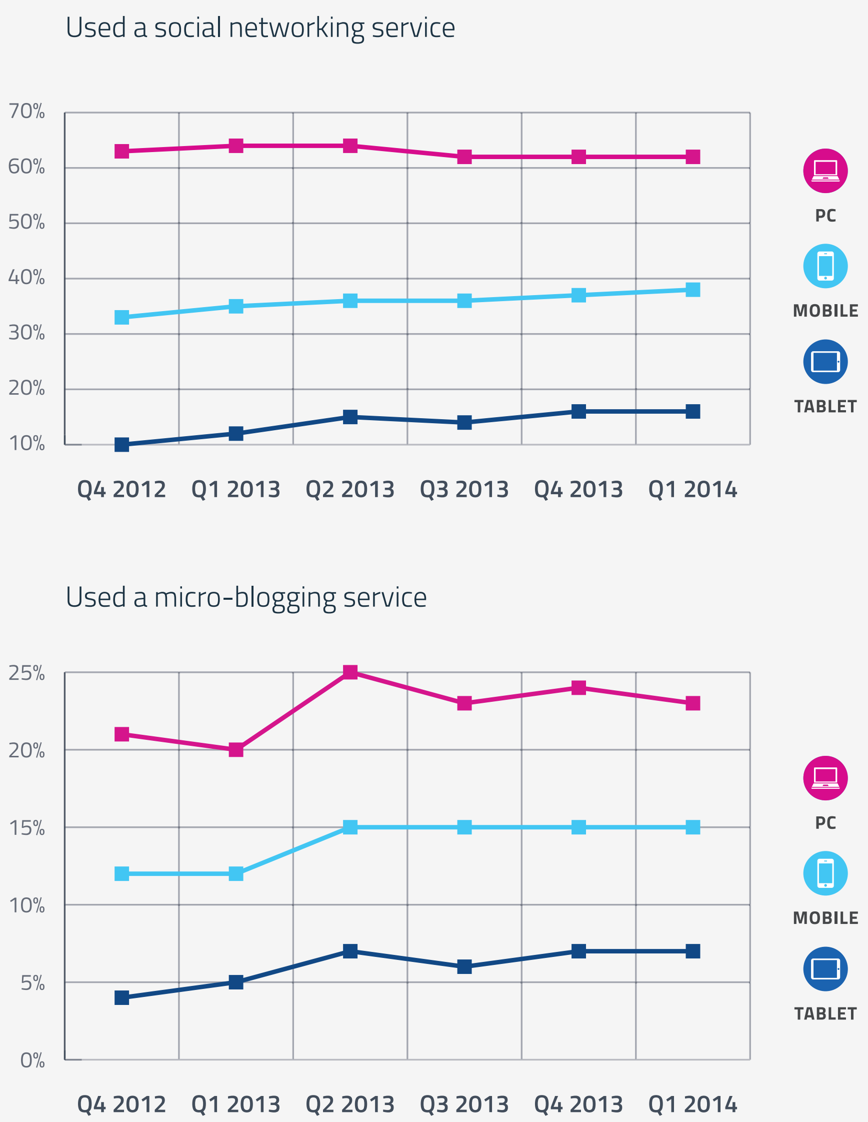
Engagement by Device: Mobiles Rising

PCs and Laptops are still the most important access points for social networks: over 60% of internet users say that, in the last month, they have used a social platform via one of these devices – a proportion which has remained stable since the end of 2012 (Chart 8).

Engagement figures for mobiles and tablets might be somewhat lower but both devices are on the rise.

Over the last year, **the percentage accessing networks via a mobile phone has grown from a third to nearly 40%;** due to the expanding size of the mobile internet audience over this period, this translates to an impressive 33% rise in user numbers – with more than 400 million 16-64s outside of China now connecting to networks in this way. Further strong growth can be expected here; PCs and laptops will certainly not be abandoned – with the nature of today's multi-device internet usage meaning that they will continue to serve as an access point at least some of the time – but mobiles are increasingly becoming a first-choice device for this activity.

CHART 8: **Social Networking and Micro-blogging by Device**



Question: Which of the following have you done online in the past month? Used a social networking service / Used a micro-blogging service /// **Source:** GlobalWebIndex Q4 2012 - Q1 2014 /// **Base:** Internet Users aged 16-64, exc. China

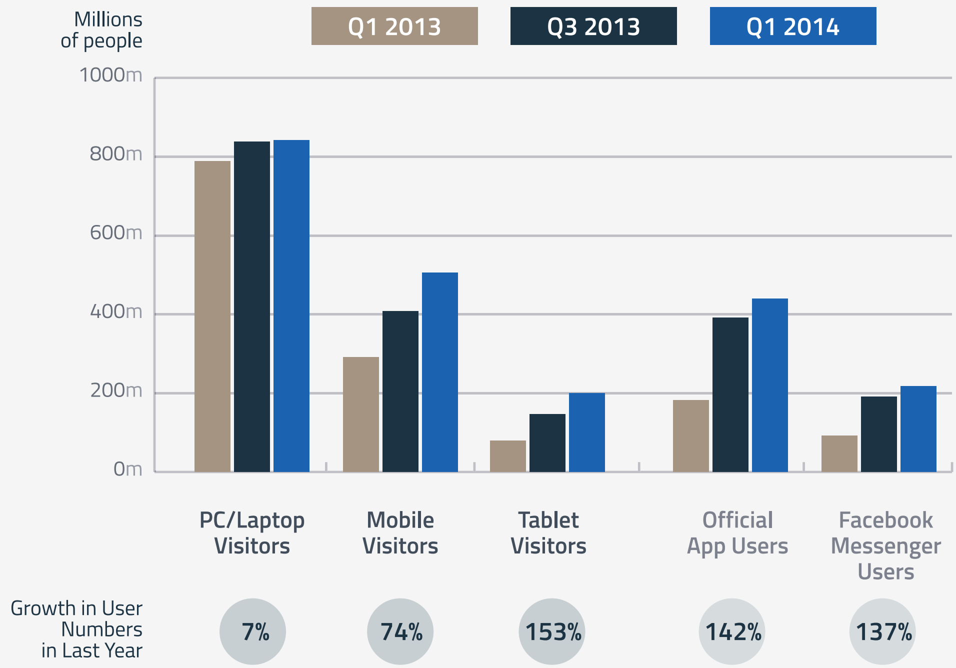
Tablets have been rising too – up from 10% in late 2012 to 16% in early 2014 (representing a striking 94% rise in user numbers). However, their lower ownership levels mean that they still remain something of a niche device when it comes to social networking. It's also worth noting that their rate of growth has slowed in the last six months, following more rapid increases in the first half of 2013. Given their status as a device used principally within the home, tablets are certainly an additional vehicle for social networking, but they will not supersede the importance of PCs, laptops and mobiles.

If we turn our attention to micro-blogging services, the gaps between the major devices are considerably smaller. The same hierarchy still exists – with PCs/laptops in pole position (23%), mobiles in second spot (15%) and tablets coming third (7%) – but PCs do not dominate in the way they do for social networks. In part, this is a natural result of lower overall engagement levels with micro-blogs. However, the younger and more tech-savvy profile of micro-bloggers is another contributor here, as is the importance of anytime, anywhere access to these platforms. Both factors favor the use of mobiles, a device which could quickly emerge as the major connection route for micro-blogs.

Facebook by Device:
Strong Growth for Mobiles and Tablets

One of the best ways to understand the implications of the percentage growth figures for each device is to look at what they mean in terms of audience sizes – as we do in Chart 9 for Facebook's 16-64 user base (including China).

CHART 9: **Facebook Visitors by Platform**



Question: Internet users who have: visited Facebook in the last month via PC/Laptop, Mobile or Tablet; who have used its official app; and who have used Facebook Messenger /// **Source:** GlobalWebIndex Q1 2013 - Q1 2014 /// **Base:** Internet users aged 16-64

Between Q1 2013 and Q1 2014, **Facebook's visitor numbers grew across all platforms and devices** (as we noted in the previous chapter, this confirms that Facebook's overall reach is still rising even if people are beginning to use it more passively).

But while PCs/Laptops continue to dominate, they have recorded a modest 7% rise in visitor numbers – far below the corresponding growth figures for all of the other access points. Indeed, **visitor numbers via mobiles were up by 74%, with users of Facebook's official app and Messenger service both rising by around 140%.** Tablets enjoyed the biggest proportional rise of all – at 153% – although it's important to note that the audience size this represents is still 300 million below that of mobile.

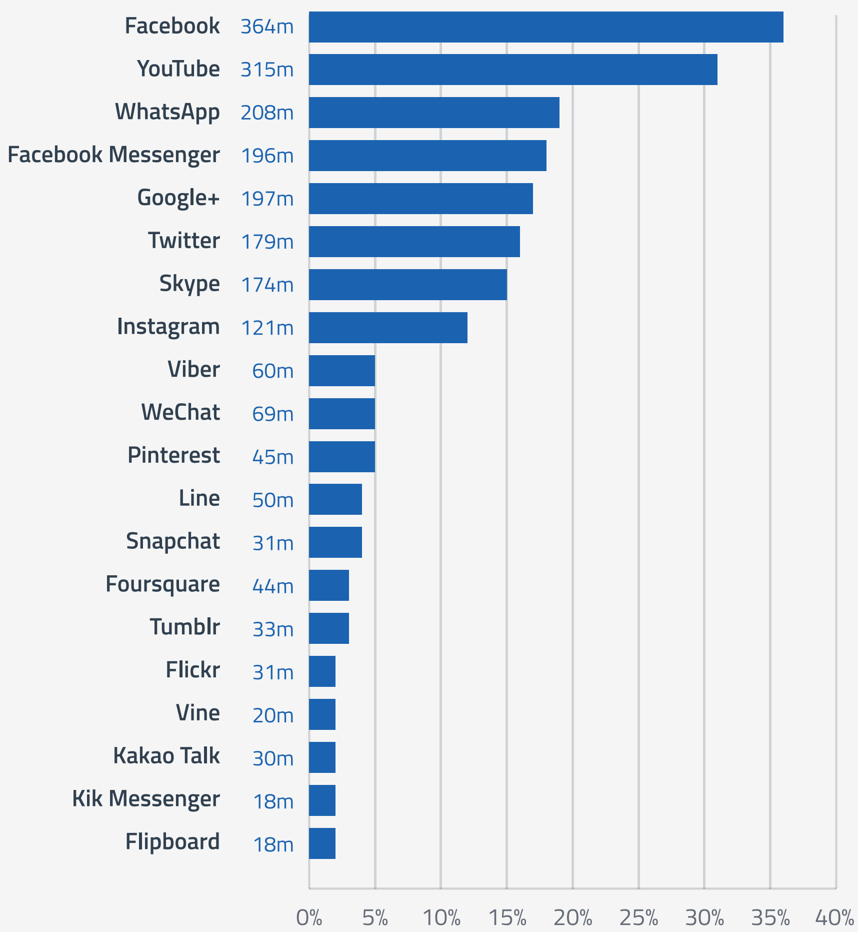
As is also the case on other social platforms, these trends show that **Facebook's traffic is becoming more and more mobile in character:** this is where the strongest and fastest rates of growth are occurring – a promising sign for the company given the increase in mobile ad-derived profits which it announced in April.

It's not that internet users are beginning to prefer mobile devices to the absolute exclusion of others; rather, they are connecting via a range of access points depending on their location, preferences and the activity they want to carry out. Facebook's Q1 2014 mobile and tablet visitors are a good illustration of this: just 2% of those visiting the site via mobile did NOT also visit via another device. The same is true for tablets: only 2.5% of visitors did NOT also use the site via a PC, laptop or mobile. **Multi-device networking is the absolute norm.**

App Usage: Facebook Ahead

Unsurprisingly, **apps are the dominant access point for those using social networks via a mobile.** In the case of Facebook in Q1 2014, for example, only 13% of its mobile audience were not visiting via the official app or through Facebook Messenger.

CHART 10: **Mobile and Tablet Apps**



Question: Which of the following mobile / tablet applications have you used in the past month? /// **Source:** GlobalWebIndex Q1 2014 /// **Base:** Internet Users aged 16-64, exc. China and Japan

As Chart 10 shows, **Facebook is the number one social app outside of China –** with 36% of internet users aged 16-64 using it on a monthly basis. Interestingly, though, the gap between Facebook and second-placed YouTube is much closer in the mobile space than it is overall, a reflection of the importance of mobiles as content consumption devices.

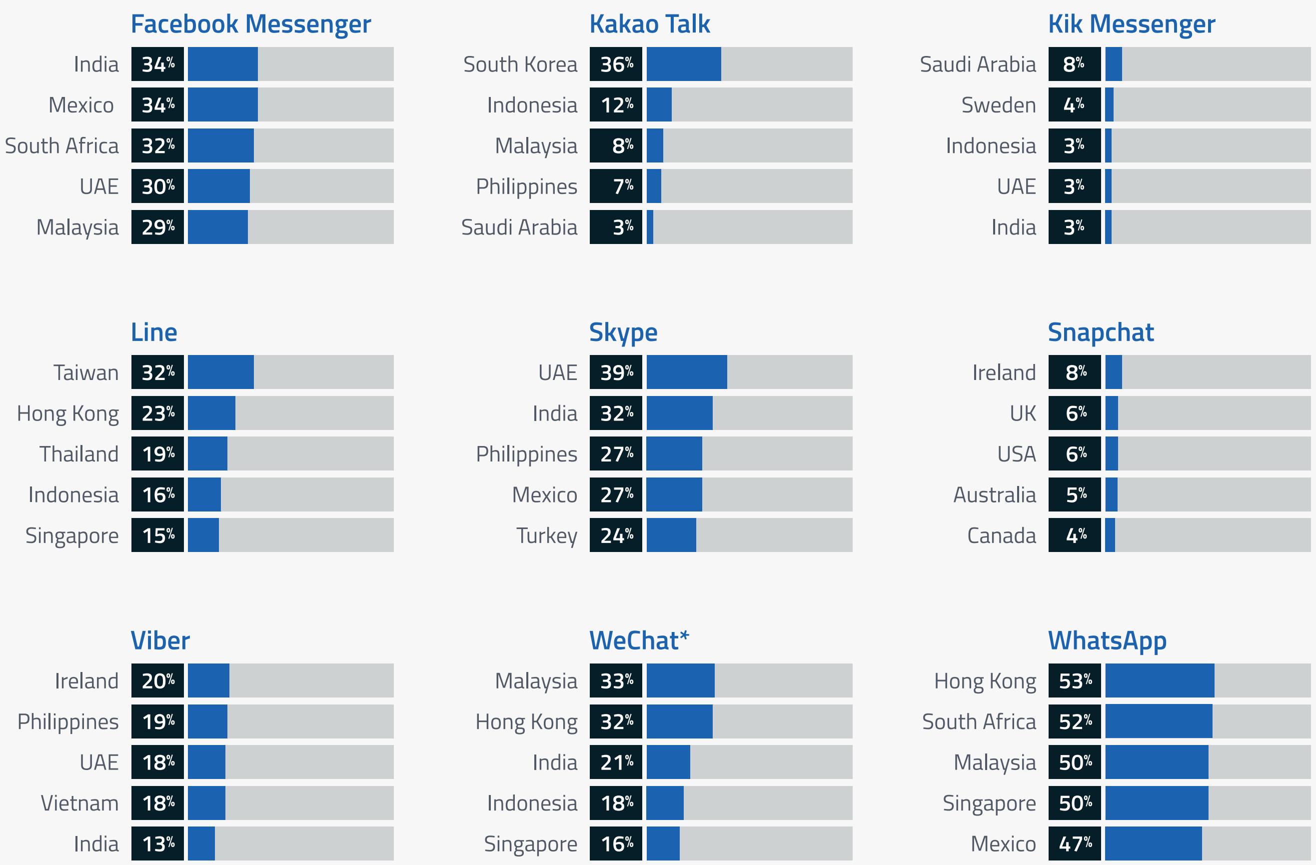
Elsewhere, the rise of mobile messaging services is strikingly clear to see. Following its purchase by Facebook, **WhatsApp has overtaken the social network's own Messenger app** to claim third place. It is now used by 19% each month, representing more than 200 million active users aged 16-64 outside of China.

GWI's figures for WhatsApp are lower than Facebook's self-published numbers. However, Facebook does not provide a definition of what it counts as an "active user" for the service, whereas our figures represent those who say they have actually used it in the last month and so reflect levels of engagement from the perspective of the individual (as opposed to a figure generated by passive data collection). In this instance, passive figures are likely to be inflated by the inclusion of anyone who is automatically logged in to the service without actually using it, a common issue with mobile applications. In addition, qualitative inputs reveal that some **users are installing and using WhatsApp on more than one device** (e.g. multiple mobiles and tablets); potentially, this can lead to each device being counted as representing a unique user – something which fails to represent the reality of multi-device internet usage.

For all apps, global usage figures can mask strong local peaks in usage. If we look at the top five markets for each of the major messaging services, it's clear that some are particularly popular in one market especially – as with Kakao Talk in South Korea. It's also apparent that **Snapchat enjoys its best engagement rates in mature internet nations (e.g. UK, USA and Australia), while WeChat is a very strong force in the APAC region.**

Perhaps the most striking trend here is the **dominance of emerging internet markets;** they account for all of the top five countries on Facebook Messenger, Skype and WhatsApp. A number of factors underlie this, including the importance of mobiles in many of these markets, the appeal of relatively cheap and instant communication routes in places where fixed-line phone connections are less prevalent, and the high levels of enthusiasm which internet users in emerging nations typically show for social networking generally.

AT A GLANCE: Top Markets for the Major Mobile Messaging Services

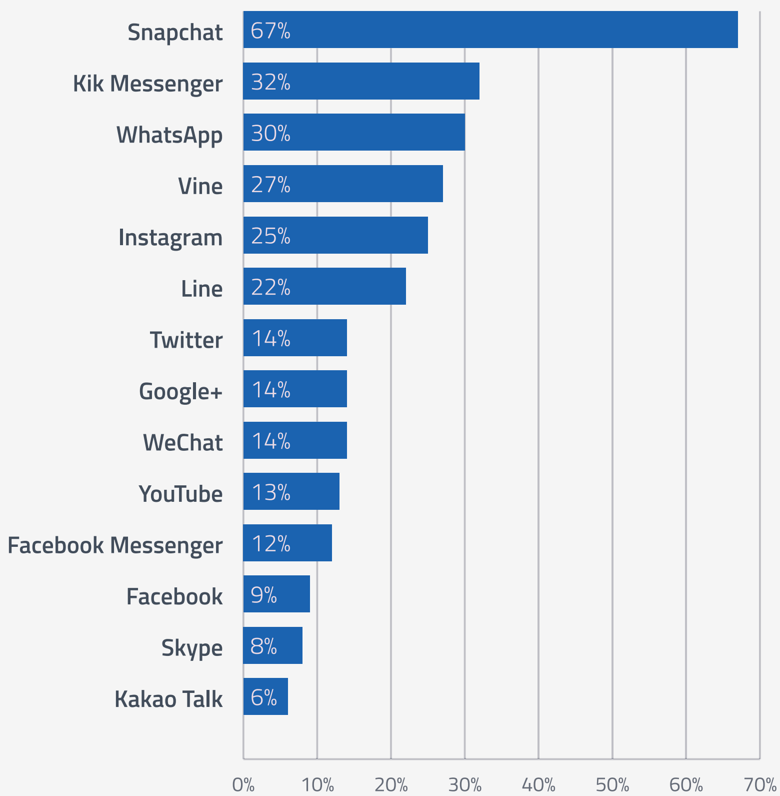


% internet population using them in Q1 2014 ** For usage of WeChat in China, please see below.*

App Growth: SnapChat is the Biggest Riser

All of the social apps tracked by GWI saw rises in their user numbers aged 16-64 during the last six months, a sign of just how central mobile is becoming for networking behaviors (Chart 11).

CHART 11: **Social Apps: Growth in Last Six Months**



Question: Which of the following mobile / tablet applications have you used in the past month? /// **Source:** GlobalWebIndex Q3 2013 - Q1 2014 /// **Base:** Internet Users aged 16-64, exc. China and Japan

Significantly, this is true even for Twitter (+14%), Facebook (+9%) and Google+ (+14%): while their overall active user figures might have fallen during this period, engagement via mobile continues to climb. This is clear evidence for the ongoing migration of networking activities to portable devices, and for the more passive type of interactions that this encourages.

Elsewhere, particularly strong rises were recorded for **Vine (+27%) and Instagram (+25%),** a trend which is in line with their growing overall popularity seen in the previous chapter.

Overall, though, it's **mobile messaging services which dominate the top of the list** – confirming the rising importance of this genre.

The biggest climber of all was **Snapchat, up by an impressive 67%.** However, given that Snapchat and second-placed Kik Messenger both have relatively small user bases, it is **arguably WhatsApp's rise which is the most compelling here; it was up by 30% between Q3 2013 and Q1 2014** and is now used by over 20% of internet users in more than half of the countries surveyed by GWI.

WhatsApp has a relatively minor presence in Facebook's home market of the USA (3%), as well as in other mature internet countries such as Canada (4%) and Australia (8%). But it is used by more than 50% of the online populations in Hong Kong, South Korea, Malaysia and Singapore. It in fact tends to have a good presence in most of the emerging internet markets – one of the reasons that would have made it such an attractive purchase for Facebook.

That said, it's worth noting that there's a **very high crossover rate between users of Facebook and WhatsApp.** In Q4 2013, just 8% of active WhatsApp users were NOT also using Facebook in some form. By Q1 2014 this had fallen even further, to just 2%.

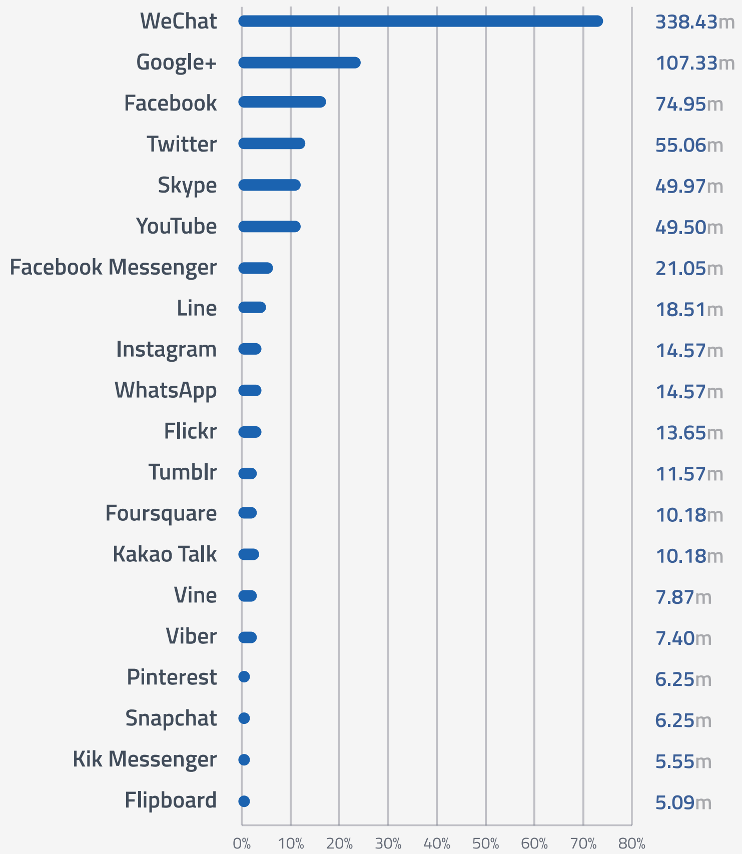
Social Apps in China: WeChat Dominates

Among Chinese internet users, one social app is dramatically ahead of all the others tracked by GWI – with **WeChat being used by a mighty 73% of the country's online population aged 16-64** (Chart 12).

Following behind – but by a considerable distance – are Google+ (23%), Facebook (16%) and Twitter (12%).

In line with trends seen in GWI's other markets, **all social apps in China experienced an increase in user numbers during the last six months,** with particularly notable rises for WeChat, Skype and YouTube.

CHART 12: **Mobile and Tablet Apps in China**



Question: Which of the following mobile / tablet applications have you used in the past month? **///** **Source:** GlobalWebIndex Q1 2014 **///** **Base:** Internet Users in China aged 16-64

Behaviors by Device: Growth on Mobiles and Tablets

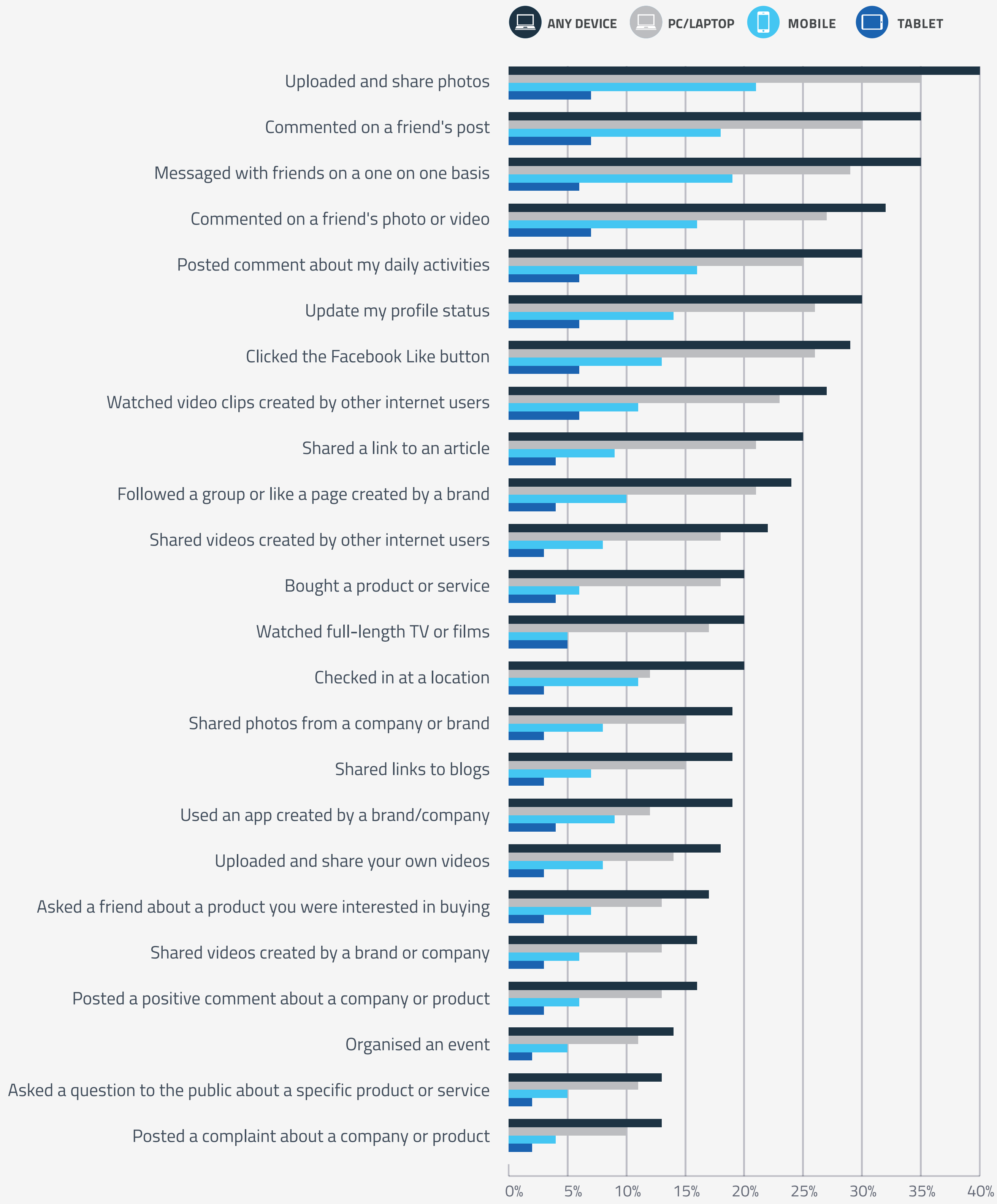
Chart 13 examines a range of behaviors on Facebook by device, with the figures representing the share of Facebook's active users outside of China aged 16-64 who have done each one.

PCs and laptops dominate across the board. If we take uploading and sharing photos as an example, then 40% of Facebook's users have done this in the last month (35% via a PC or laptop, 21% via a mobile and 7% via a tablet).

In part, this is because ownership levels for PC and laptop devices remain the highest (particularly compared to tablets). However, this trend also reflects the reality that **many users still prefer to actively engage via PCs and laptops** – they continue to be considered as the best and most convenient access points, especially for more engaged behaviors which people are most likely to undertake at home rather than out-and-about.

Broadly speaking, **mobiles and tablets still tend to promote more passive types of visit where people view the site but do not always interact with it.** This is one reason why overall active usage is falling: changing device usage is impacting how we behave on social networks.

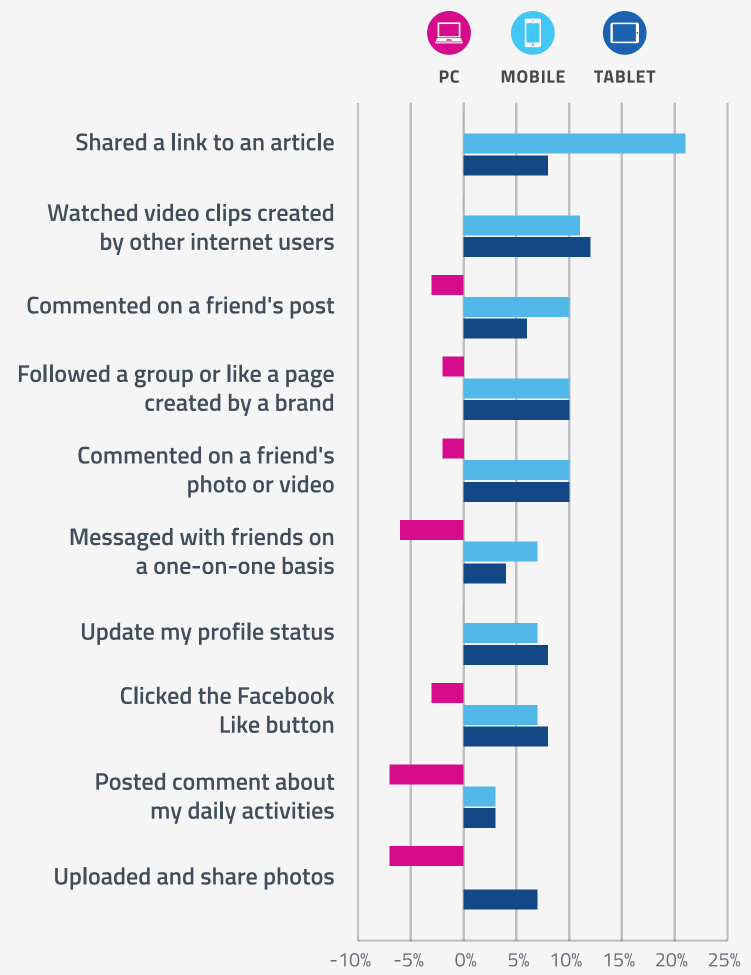
CHART 13: **Facebook Behaviors by Device**



Question: Thinking about Facebook, could you please tell us if you have done any of the following in the past month through each of the following devices? /// **Source:** GlobalWebIndex Q1 2014 /// **Base:** Active Facebook users aged 16-64, exc. China

This is, however, a trend very much in flux: as Chart 14 shows, engagement rates for the top ten behaviors are either steady or declining via PCs/laptops but increasing via mobiles and tablets. As networking migrates to portable devices, then, the major behaviors are beginning to follow suit. It's unlikely that usage via mobiles and tablets will ever be as active in character as it is via PCs and laptops, but the gaps are closing.

CHART 14: **Top Facebook Behaviors by Device**



Question: Thinking about Facebook, could you please tell us if you have done any of the following in the past month through each of the following devices? /// **Source:** GlobalWebIndex Q3 2013 - Q1 2014 /// **Base:** Active Facebook users aged 16-64, exc. China

For further analysis of the topics covered in this section, please download the following data packs from the Insight Store:

- *PC Activities: All Activities, Mobile Activities: All Activities, Tablet Activities: All Activities*
- *Website Visitation (PC), Website Visitation (Mobile), Website Visitation (Tablet)*
- *Mobile App Types (Downloaded), Mobile App Types (Used), Mobile Apps Active Usage: Named Apps*
- *Facebook Behaviors (PC, Mobile, Tablet)*

5

AGE TRENDS

Tracking social engagement by age

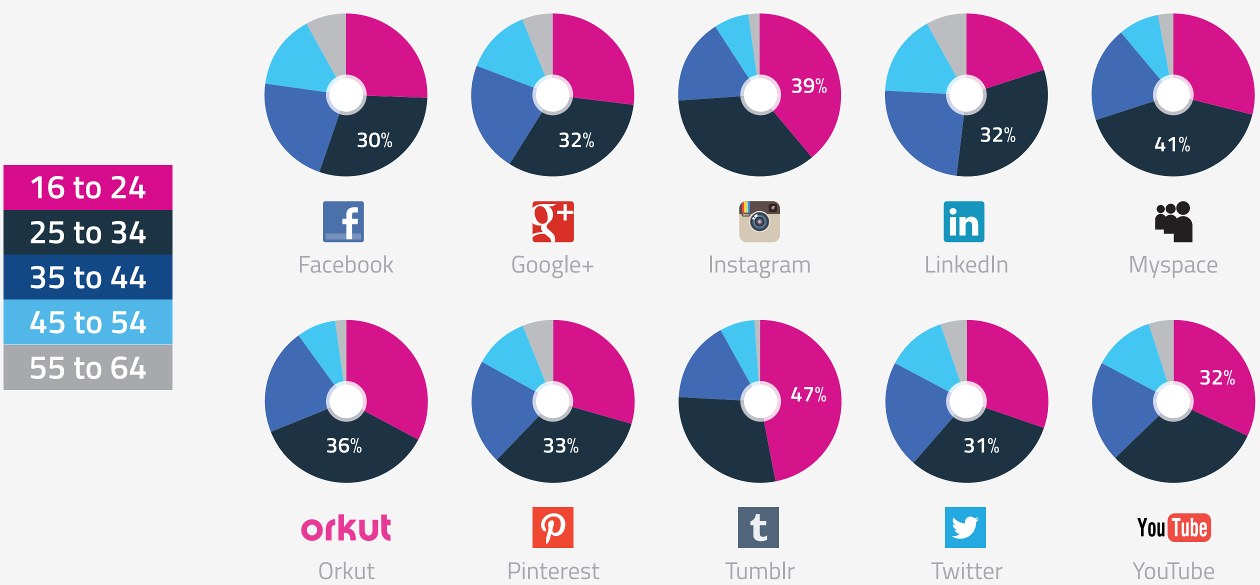
Key Headlines

- Of the top 10 social platforms, Facebook and LinkedIn have the oldest audiences, while Tumblr and Instagram can boast the youngest.
- Younger networkers carry out the most activities on social networks: 84% of 16-24s are "sharers", compared to just 50% of 55-64s.
- Teens are now slightly less likely to be actively using Facebook than the wider internet population. But they are twice as likely to be using Snapchat, which was the fastest growing app for 16-19s in the last six months.

Networks by Age: Tumblr and Instagram Have the Youngest Audiences

Social activities are still dominated by younger audiences: more than 50% of active users on all of the top 10 social platforms come from the youngest two age groups (Chart 15).

CHART 15: **Active Users of the Top 10 Social Platforms, by Age**



Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, tablet, etc. /// **Source:** GlobalWebIndex Q1 2014 /// **Base:** Active social network users aged 16-64, exc. China

Beyond this, there are some striking age-based differences between the networks. **LinkedIn and Facebook have the oldest audiences**, with just 52% and 55% of their respective active users coming from the 16-34 group.

In contrast, **Tumblr and Instagram have the youngest user bases** (76% and 74%). Along with YouTube, these are also the only platforms where 16-24s form the largest share of active users. This is especially pronounced on Tumblr, where 47% of its audience are from the youngest group.

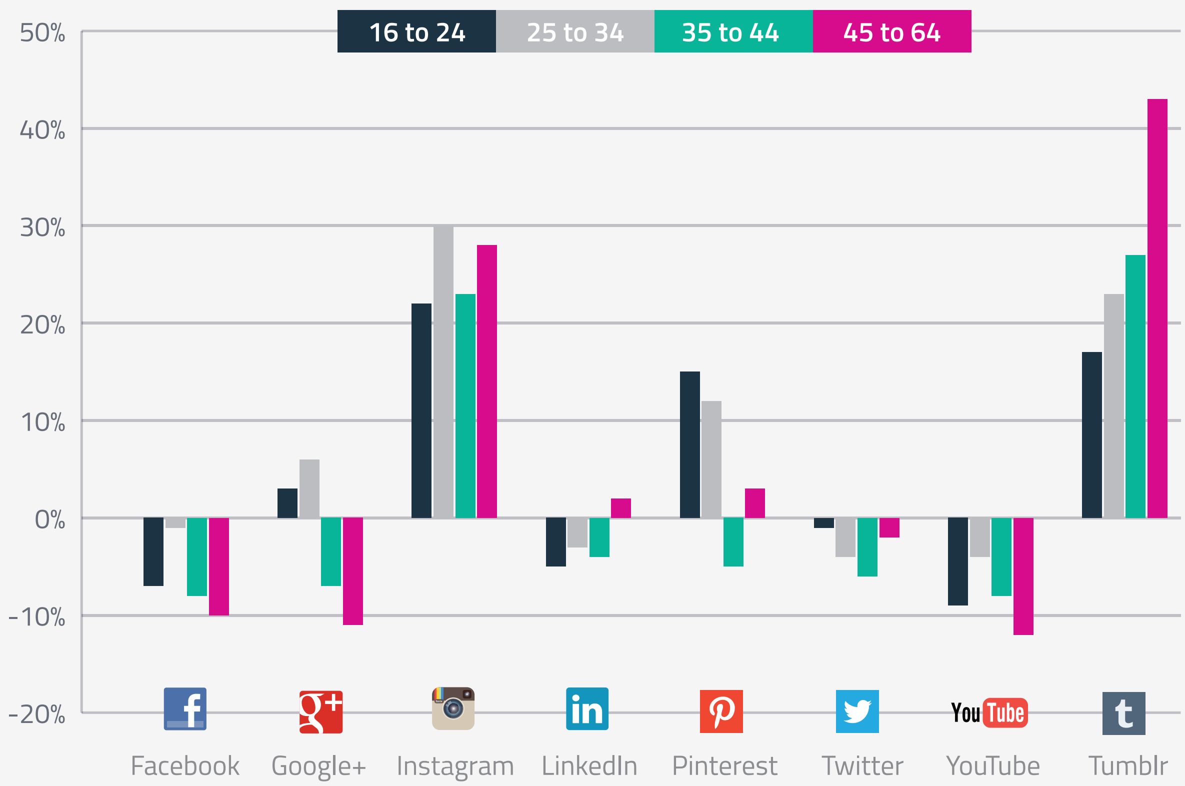
On all of the other seven platforms featured in Chart 15, it is 25-34s who form the biggest share of active users. They represent the largest group of all on Myspace (41%) but are also notably ahead of 16-24s on LinkedIn, Facebook and Google+.

If we discount LinkedIn due to its professional character, this trend is a direct result of **ageing membership bases: essentially, we're seeing people who joined sites like Facebook several years ago remaining active as they grow older.** But this is not so pronounced among their younger counterparts: 16-24s are not quite as keen on the major platforms as their predecessors were.

Changes in Active Usage by Age

On most of the major social platforms, changes in active usage are fairly consistent across the age groups (Chart 16).

CHART 16: **Changes in Active User Numbers in Last Six Months, By Age**



Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, tablet, etc. /// **Source:** GlobalWebIndex Q3 2013 - Q1 2014 /// **Base:** Internet users aged 16-64, exc. China

On Facebook, for example, the last six months saw a decrease among all groups. That the drop was smallest among 25-34s gives more evidence that these early adopters continue to remain some of the most attached to the site. Small cross-age declines were also seen on Twitter and YouTube. Clearly, then, it's not just the youngest users that the biggest platforms need to work to keep engaged.

Equally important is that **Instagram and Tumblr are the only two platforms to post rises across all groups:** their growing appeal cuts across age, even if 16-34s form by far the largest audiences within their active user bases.

Age patterns are also pretty consistent in terms of app usage. Across the ten biggest social apps, 16-34s are the most likely to be using them – with engagement levels then falling within each successive age group. Compared to the oldest groups, 16-34s over-index most strongly for using the Instagram, WeChat and Twitter apps.

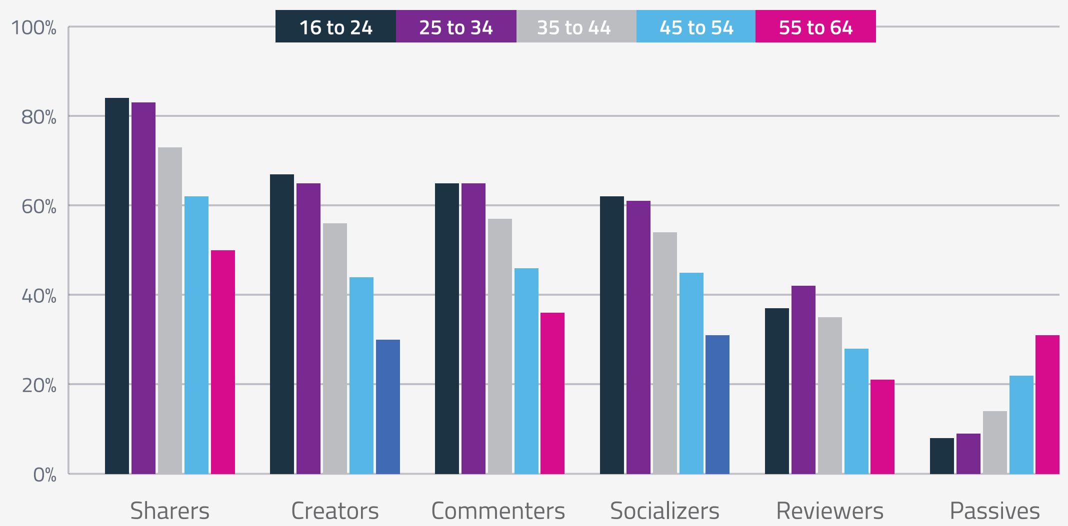
AT A GLANCE: Usage of select social apps by age

	Facebook	WhatsApp	Twitter	Instagram
16-24	45%	24%	24%	21%
25-35	45%	25%	20%	16%
35-44	37%	19%	16%	9%
45-54	24%	11%	10%	5%
55-64	15%	7%	5%	2%

16-24s the Biggest Sharers

Segmenting social networkers based on their behaviors reveals that **"sharers" are the most common group within each age bracket** (Chart 17).

CHART 17: **Social Segmentation, by Age**



Source: GlobalWebIndex Q1 2014 /// **Base:** Social networkers aged 16-64, exc. China

"Sharers" are individuals who upload photos, hit "like" buttons, re-post/re-tweet or share content; the vast majority of 16-24s and 25-34s fall into this category, although the figures then drop a little in each of the older age groups.

A similar pattern is present across four of the other segments, with 16-34s leading the way in each case:

- The "creators" – networkers who are uploading videos, writing stories or blogs, running their own websites or contributing product ideas to campaigns.
- The "commenters" – those who have posted questions or comments across various social platforms.
- The "socializers" – individuals who say they use the internet to stay in touch with friends or to keep others up-to-date with their lives.
- The "reviewers" – those who are posting reviews and opinions online.

Clearly, younger networkers remain the most engaged group; **16-34s carry out the greatest number of activities on social platforms, as well as having the broadest behavioral profiles.**

Only with the "passives" segment do we see a different situation. This group incorporates those people not included in any of the other categories – i.e. those who are not typically interacting with content or fellow contacts in any major way. This segment includes just 8% of 16-24s but a much more substantial 31% of 55-64s (with the figures rising directly in line with age). So, **older internet users are not only less likely to be on social networks in the first place, those who do use them are less likely to be as active as their younger counterparts.**

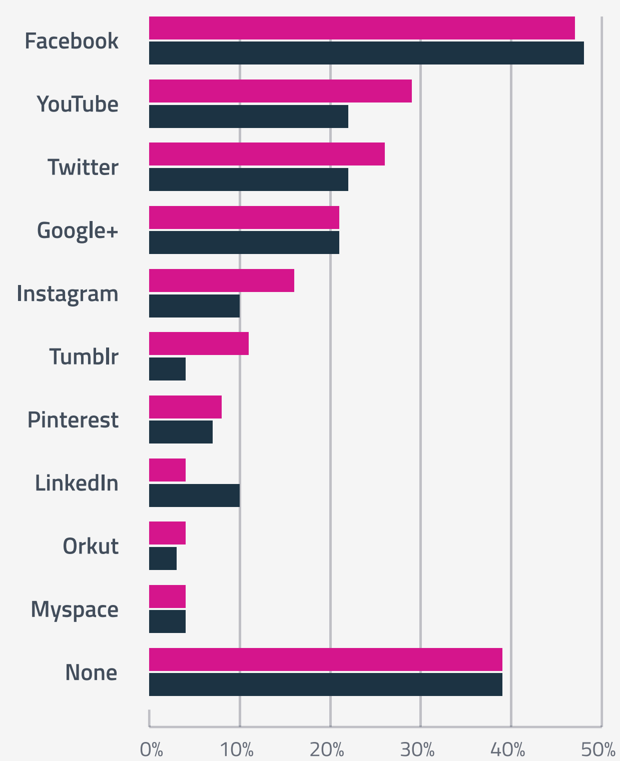
Teens: Behind on Facebook

Teens (defined here as 16-19 year olds) are typically seen as the social networking trendsetters – the early adopters who lead the way and give the best indication of how social behaviors are changing. When Facebook first emerged as a college-exclusive network, it was members of this group who were the first to use it. But with the site now more than 10 years old and Mark Zuckerberg turning 30, Chart 18 gives a snapshot of how today's teens are using the ten biggest platforms.

As we might expect, teens have a healthy lead on several platforms and, compared to all internet users, **16-19s over-index most strongly for YouTube, Instagram and Tumblr.**

But the trend with the most significance of all here is that **teens are now less likely than the general internet population to be actively using Facebook.** Certainly, the difference between the two groups is a very small one. And it's important to recognize that Facebook remains by far the most popular social network for teens. Nevertheless, this still represents a significant shift in Facebook's age profile as its original members grow older. For the youngest users, it is no longer the default go-to point that it once was.

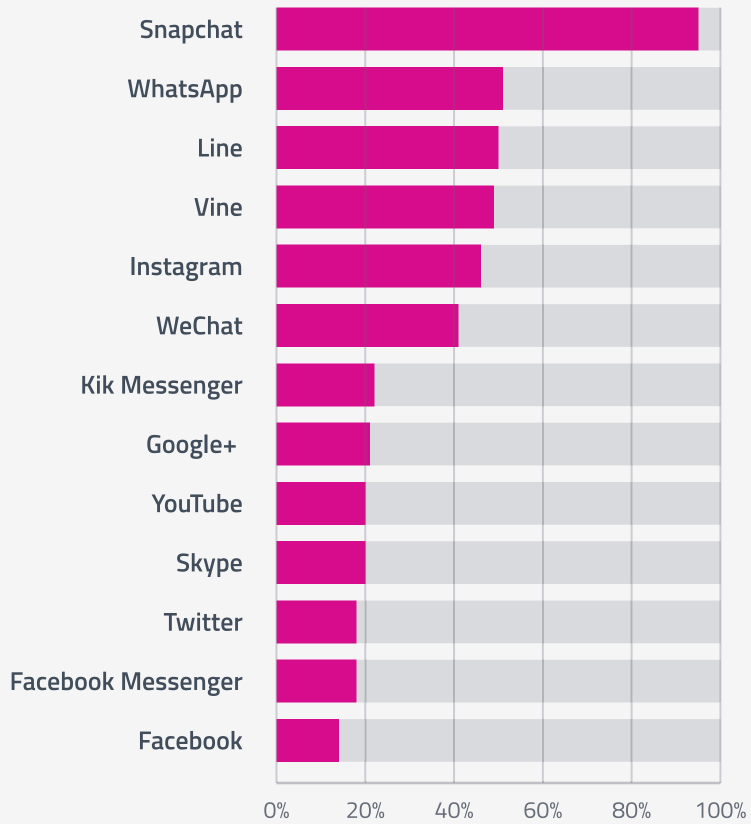
CHART 18: **Teen Usage of the Top Social Platforms**



Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/ Laptop, Mobile phone, tablet, etc. /// **Source:** GlobalWebIndex Q1 2014 /// **Base:** Internet users aged 16-19 and 16-64, exc. China

Teen App Usage: Snapchat Growing the Fastest

CHART 19: **Changes in App Usage Among Teens in the Last Six Months**



Question: Which of the following mobile / tablet applications have you used in the past month? /// **Source:** GlobalWebIndex Q3 2013 - Q1 2014 /// **Base:** Internet Users aged 16-19, exc. China and Japan

Partial explanation as to why teens aren't using Facebook as actively as they did in the past comes from Chart 19 – tracking changing user numbers for some of the biggest social apps.

Across the board, numbers in the teen group have risen in the last six months, a trend which confirms the increasingly mobile character of networking among younger users. But it's **messaging apps which have experienced the most buoyant rises: Snapchat is up by an impressive 95%, while WhatsApp and Line have both seen growth of about 50%.**

Teens are now more than twice as likely as others to be using Snapchat; even though its overall user base remains relatively small, it's clear that teens are placing a high premium on messaging services which provide instant, personal and secure forms of communication. In short, **some of the activity that used to be taking place on the bigger social platforms is now shifting to messaging apps.** Teens are still looking at sites like Facebook but are increasingly turning to other tools in order to communicate directly with each other.

In part, this change is happening because the culture of broadcasting everything to everyone on social networks has long been weakening. **Internet users have grown ever more aware of the importance of managing their digital footprints,** and teens are at the forefront of this trend. But it's also a result of Facebook being around for so long; for teens in the 00s decade, Facebook was still relatively new and not used as heavily by their older peers. Fast forwards to the 2010s, and Facebook is no longer the exclusive preserve of the young. This has opened a gap for newer, different and/or seemingly "cooler" platforms – with messaging services, as well as platforms like Vine, Instagram and Tumblr, all being obvious beneficiaries.

To be clear, Facebook is still the global platform with by far the biggest reach outside of China; this holds true for teens as it does for all other groups. But it now exists within a much more diverse and competitive social landscape, and hence it's unsurprising to see some activities and users migrating to alternatives.

For further analysis of the topics covered in this section, please download the Teens and Generations reports from the Insight Store, as well as the following data packs (each of which contains figures by age):

- *Account Ownership: Social Platforms*
- *Active Usage: Social Platforms*
- *Mobile Apps Active Usage: Named Apps*

Clients with access to the Pro Platform can cut any digital behavior or attitude monitored in the GWI survey by the social segmentation.

6 FUTURE OUTLOOK

- **Facebook's overall reach will keep increasing.** Despite minor ongoing declines in active usage, it is too integrated within the internet landscape to be abandoned or to become irrelevant. Its purchases are also in line with current networking trends; although it has vowed to keep both services separate from its main platform, it's still the case that it owns the fastest growing social platform (Instagram) as well as one of the biggest rising messaging apps (WhatsApp). The latter also provides it with impressive levels of coverage in many emerging internet markets.

- **Mobile networking will continue to experience buoyant levels of growth.** Inevitably, this will promote more passive forms of engagement – with users visiting platforms more frequently but carrying out fewer actions overall. This will not be an issue for advertising as long as targeting is accurate.

- **Messaging services will capture a growing share of one-to-one communication,** with much of the activity that would previously have happened via text messages or through social platforms migrating to messaging apps. In a sense, social platforms will grow more specialized as the one-site-fits-all model of networking loses ground.

- **Local platforms will struggle to compete with the truly global networks** – as demonstrated by ongoing declines in usage on a site like Tuenti in Spain as well as the closure of Hyves in the Netherlands. Even in China, it's clear that large numbers are keen to use international platforms like Google+, Facebook and Twitter. These numbers will inevitably grow, especially as more internet users turn to tools like VPNs and Proxy Servers.

- **The biggest growth in networking will occur in emerging markets** where internet penetration rates are typically modest but are rising quickly. This is of special importance given the more engaged nature of internet users in these countries.

- **High levels of device sharing, widespread usage of VPNs and more passive forms of networking** will make it increasingly difficult to identify users and understand their behaviors through passive data collection alone.

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