

GWI Social Summary

Q3 2014



GlobalWebIndex's quarterly report on the latest trends in social networking – providing insights on topline and national levels of engagement as well as current behaviors across devices and age groups

Introduction

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

Drawing on our Q3 2014 wave of research, we highlight a range of demographic, region and market specific trends and offer insights on:

- The most popular social networks and apps, including rates of growth over the last six months
- Current attitudes towards Facebook
- The rise of mobiles, tablets and messaging services
- Networking behaviors by age, with a special focus on teens.

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.

In this summary, we provide the key headlines and statistics from the report; for more detailed insights, coverage and implications, please see the full version.

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 bespoke, target audiences in our PRO Platform.

For further details on social trends at a national level, please see our 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.

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 per year, with larger samples in key markets such as the UK and the US (30,000 each). Data is collected in the last six weeks of each 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. No individual can participate in our survey more than once a year, and we set quotas to ensure correct proportions in terms of gender, age and educational attainment. This data is also used to calculate the **universe estimates** – which are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

Throughout GWI Social, we look at three forms of engagement with social platforms:

- **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.

Due to the sheer scale of the Chinese market, its high number of local platforms and the official restrictions it places on sites such as Facebook and Twitter, China is excluded from our global social networking charts.



AMERICAS

US // Canada // Mexico
// Argentina // Brazil

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 // Malaysia //
Vietnam // Thailand // Taiwan // South
Korea // Australia // Philippines

Teens are Bored of Facebook

- Despite retaining its position as the number one social network, Facebook has some major challenges to face, with **50% of members in the UK and US saying that they're using it less frequently than they used to** – rising to **64% among the key teen demographic** (defined here as 16-19s).

- Among the top reasons for declining usage are that members are **less interested in Facebook** than they used to be (45% overall, but climbing to 54% for teens), that **they're bored of it** (37%, but up to 50% for teens) and that **it's not as cool as it used to be** (18%, rising to 27% for teens).

- Facebook is also the **only network which has seen a drop in active usage among 16-24s during 2014**; although it's a very small one (-0.5%), it needs to be viewed in the context of all other networks posting substantial increases among this audience.

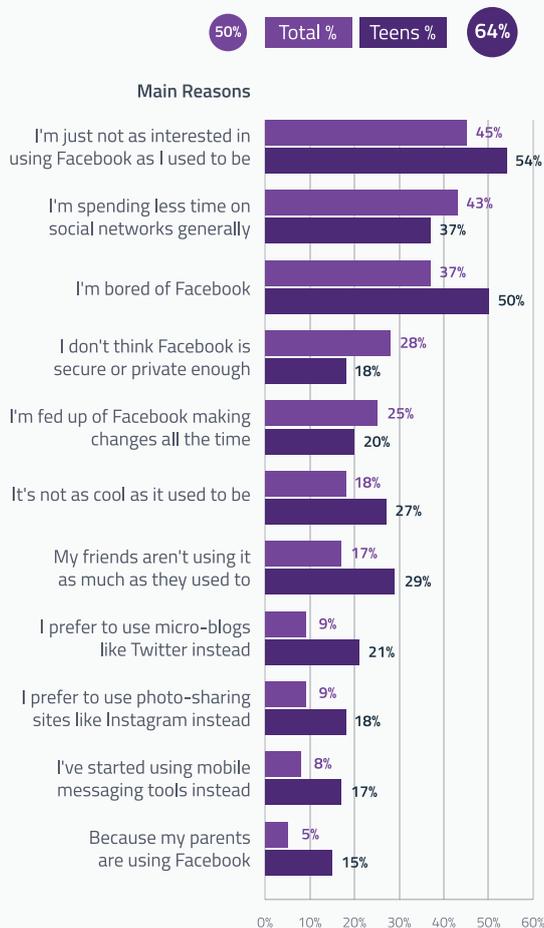
- Members are using Facebook more passively; since the start of 2013, we've seen behaviors like sharing photos and messaging friends fall by around 20 percentage points.

- Nevertheless, **4 in 5 internet users outside of China have a Facebook account** – a figure which peaks in LatAm at 93%. What's more, **1 in 2 say they are actively using Facebook each month**, giving it about twice as many active users as the three sites which compete for second position: Twitter, YouTube and Google+.

- Multi-networking is flourishing; China excluded, a significant 91% of 16-64s visited YouTube *or* Facebook *or* Twitter *or* Google+ last month. Moreover, some 19% visited *all four*.

Facebook Usage Levels in the US and UK

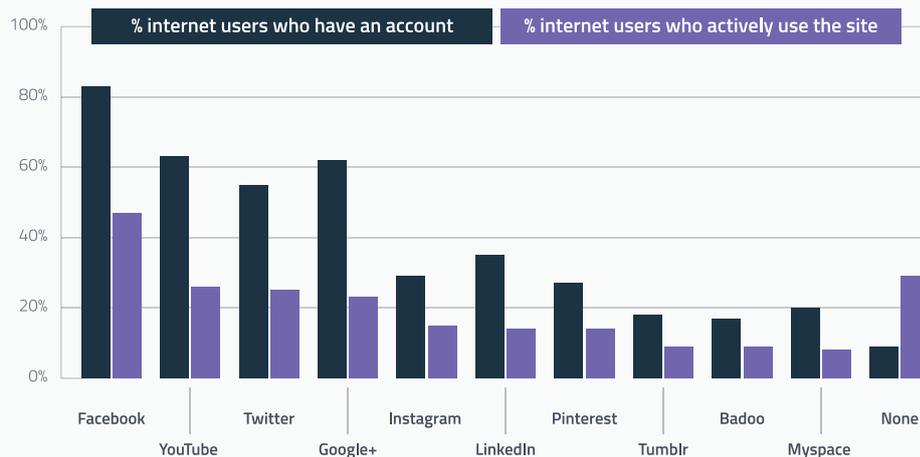
% US/UK Members Who Say They're Using Facebook Less



Question: Are you using Facebook less than you used to? For what reason(s) are you using Facebook less than you used to? // **Source:** GlobalWebIndex Q3 2014 // **Base:** 12,399 Facebook Members in the US and UK aged 16-64

Want to explore this data on the PRO Platform? Click [Social Media > Facebook Access > Facebook Usage Levels](#) and [Social Media > Facebook Access > Motivations to Use Facebook Less](#)

Top 10 Social Platforms - Account Ownership and Active Usage



Question: Account: On which of the following services do you have an account?

- Active users: Which of the following services have you used or contributed to in the past month using any type of device?

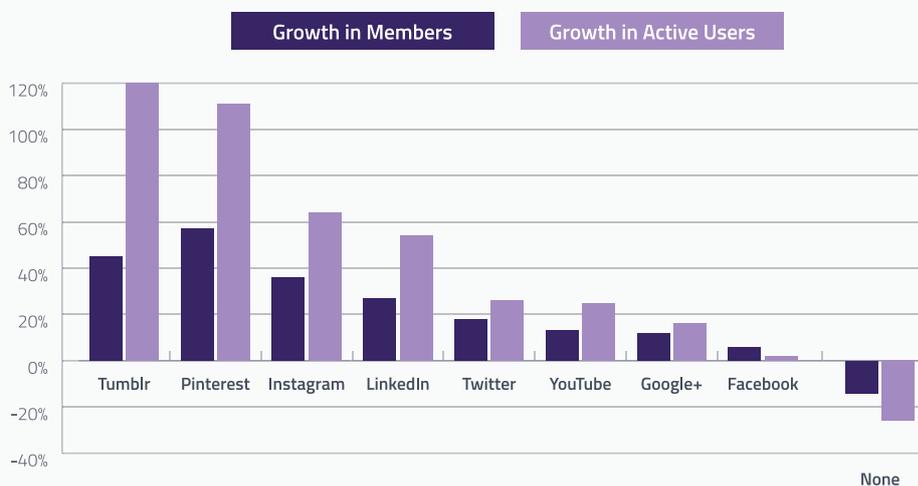
// **Source:** GlobalWebIndex Q3 2014 // **Base:** Internet users aged 16-64, exc. China

Want to explore this data on the PRO Platform? Enter "Account" or "Active" in the free search box, or click [Social Media > Social Platforms > Account Ownership / Active User](#). Alternatively, you can download our pre-cut "Account Ownership: Social Platforms" or "Active Usage: Social Platforms" data packs

Tumblr, Pinterest and Instagram have the Fastest Growing and Youngest Audiences

- **Tumblr and Pinterest are the fastest growing social platforms in 2014**, with their active user numbers having increased by 120% and 111% respectively. Instagram is the third fastest riser, up by 64% since Q1 2014.
- However, *all social networks saw an increase in active usage during Q2 and Q3 2014 as the World Cup became a major talking (and sharing) point within the online space.* Since the start of 2014, there has in fact been a 14% decrease in the numbers who say they don't have accounts on *any* of the 35+ networks tracked by GWI, as well as a 26% drop in the numbers saying they hadn't actively used any social platform.
- **Tumblr and Instagram have the youngest audiences**, with more than 70% of their users being 16-34. In contrast, **Facebook has the oldest user base**; a quarter of its active users are aged 45+.

Top Social Platforms: Growth in Members and Active Users during Last 6 Months

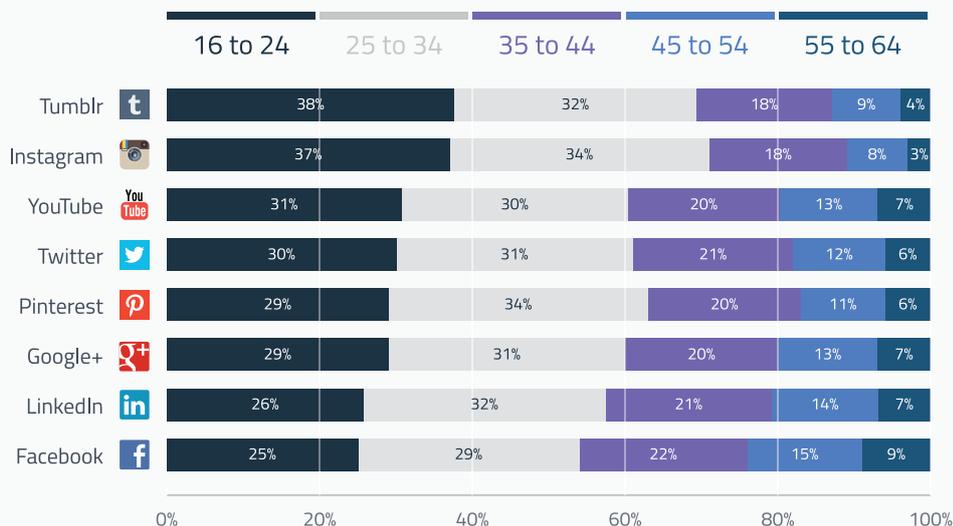


Question: Members: On which of the following services do you have an account?
 Active users: Which of the following services have you used or contributed to in the past month using any type of device?
 Source: GlobalWebIndex Q1 2014 - Q3 2014 Base: Internet users aged 16-64, exc. China



Want to explore this data on the PRO Platform? Enter "Account" or "Active" in the free search box, or click **Social Media > Social Platforms > Account Ownership / Active User**. Alternatively, you can download our pre-cut "Account Ownership: Social Platforms" or "Active Usage: Social Platforms" data packs

Active Users of the Top 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 Q3 2014 Base: Active social network and active app users aged 16-64, exc. China

Snapchat is the Fastest Growing App

- **Snapchat is the fastest growing app** (up 56% since the start of 2014), followed by Facebook Messenger (+52%) and Instagram (+47%).

- Overall, though, Facebook is still by far the top social app (being used by 43% of internet users globally). Facebook also dominates in terms of chat/messaging apps, with **Messenger (27%) having re-taken the lead from WhatsApp (25%)** following Facebook's decision to strip the messaging functionality out of its main app.

- The teen problem is present here once again for Facebook: **teens over-index more strongly for Snapchat than any other app**, with the highest usage rates among this audience coming in key markets such as the UK, Canada, the USA and Australia (where the figures range from 25-40% among online teens, often putting Snapchat *ahead* of Facebook's messaging apps). Snapchat also has the youngest audience of any social or messaging app.

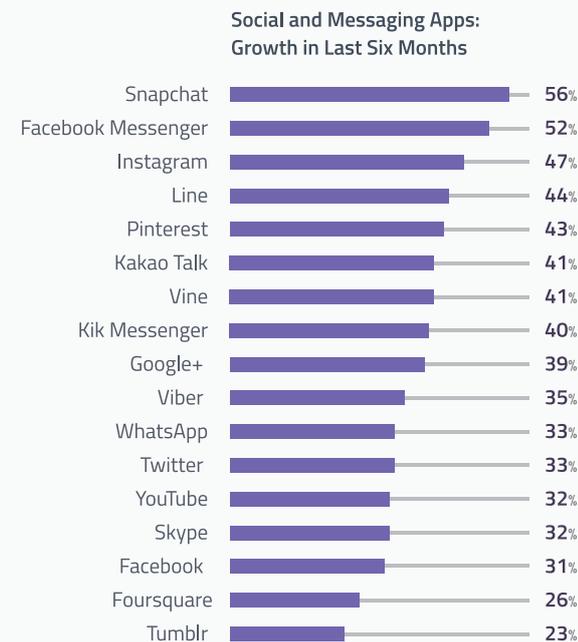
Question: Which of the following mobile / tablet applications have you used in the past month?

/// **Source:** GlobalWebIndex Q1 2014 - Q3 2014 /// **Base:** Internet Users aged 16-64, exc. China



Want to explore this data on the PRO Platform? Enter "Applications" in the free search box or click **Apps > Specific Applications > Specific Applications Used**. Alternatively, you can download our pre-cut "Mobile Apps Active Usage: Named Apps" data pack

Social and Messaging Apps: Growth in Last Six Months



Mobiles Continue to Rise

- **Mobiles and tablets are seeing big rises for social networking**, whereas the audience engaging via PCs/laptops is contracting.

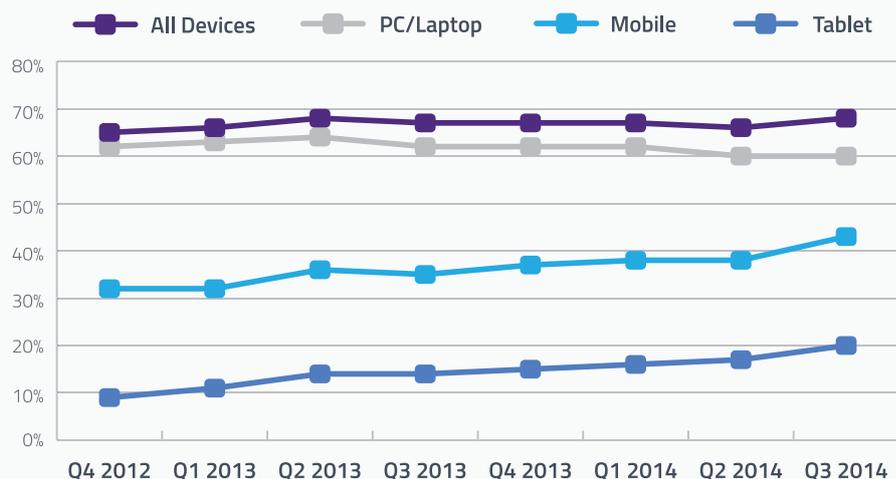
- It's now about 6 in 10 who use social networks via a PC/laptop compared to more than 4 in 10 logging on via mobiles.

- **Mobile networkers are young and affluent.** While women (44%) only slightly ahead of men (42%), there are far bigger differences by age: **16-34s (52%) have a considerable lead over the other age groups**, with this behavior reaching its lowest point among

55-64s (19%). It's also within **the top income quartile (49%) that this activity reaches its peak.**

- The most striking variations are to be found at a regional and national level. While more than half of those in LatAm and MENA are now networking via mobile, for example, the equivalent figures in Europe and North America lag behind at 38%. In terms of countries, Mexico is the global leader – where the figure approaches 7 in 10 – but **all thirteen of the markets where this behavior has become majoritarian are fast-growth nations.**

Social Networking by Device



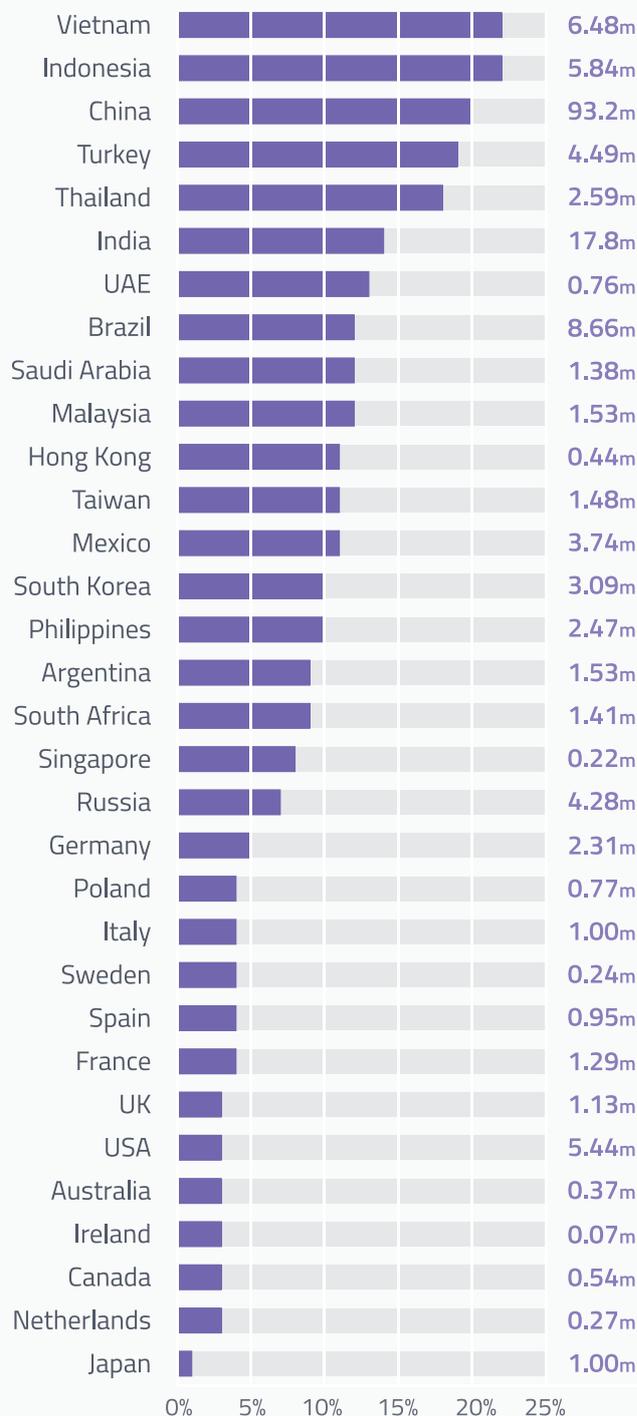
Question: Which of the following have you done online in the past month? Used a social networking service /// **Source:** GlobalWebIndex Q4 2012 - Q3 2014 /// **Base:** Internet Users aged 16-64, exc. China



Want to explore this data on the PRO Platform? Enter "Online Activities" in the free search box, or click **Cross Device > Online Activities - Cross Device Split**. Alternatively, you can download our pre-cut "Used a Social Networking Service" data packs

VPNs are a Major Gateway for Social Networks – Especially in China

Using VPNs to Access Social Networks



Question: Can you please tell us why you use VPNs or proxy servers when browsing the internet? To access restricted social networks /// **Source:** GlobalWebIndex Q4 2013 - Q3 2014 /// **Base:** Internet Users aged 16-64



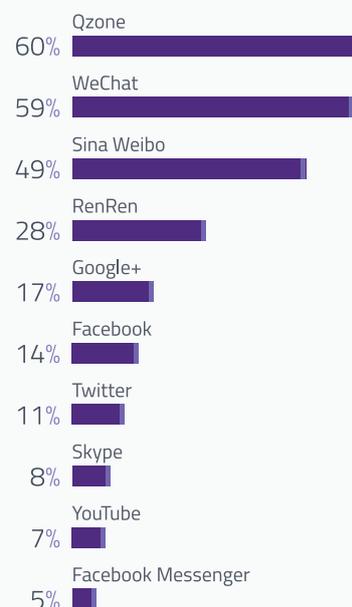
Want to explore this data on the PRO Platform? Enter "VPN" in the free search box, or click [Internet Landscape > VPN/Proxy Usage](#). Alternatively, you can download our pre-cut "VPN and Proxy Server Usage" and "VPN and Proxy Servers: Usage Motivations" data packs

Virtual Private Networks (VPNs) and Proxy Servers have become a huge access point for social networks, especially in those fast-growth markets where certain platforms are subject to official bans.

Overall, some 44% of VPN users say they have visited Facebook in the last month, but this trend is most significant of all in China – where over 90 million online adults say they have used a VPN in order access restricted social networks. This is one of the major reasons behind sites like Facebook and Twitter having substantial audiences in China (with about a third in the country having accounts on the two services).

That said, networking in China is still dominated by Qzone, Sina Weibo and Tencent Weibo, all of which can boast membership rates of two thirds or more. In terms of apps, it is Qzone (60%) and WeChat (59%) which lead – with WeChat actually representing the world's largest messaging app when its huge Chinese audience is included.

Social and Messaging Apps in China



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



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