



everyone<sup>TM</sup>  
social

# 12 GLOBAL TRENDS EVERY MARKETER NEEDS TO KNOW NOW

# The 12 Global Trends

It's that time of year! Time for Mary Meeker's Internet Trends presentation, which this year clocks in at 213 slides. In this post we've summarized the top 12 trends you need to be thinking about. News flash: the world is continuing to change, big-time, more so and more quickly than we likely know. Asia, Android, video, images, messaging, and India are some of the drivers. Let's jump in.

**1** WE'RE NOT  
EVEN AT 50%

**2** INDIA IS THE NEXT  
MAJOR MARKET

**3** 50% OF GLOBAL SMARTPHONE  
OWNERS ARE IN ASIA

**4** CHINA AND ASIA  
GROWTH IN A PICTURE

**5** THERE ARE 5X MORE  
ANDROID SMARTPHONES

**6** ADBLOCK USAGE WAY UP,  
ESPECIALLY ON MOBILE

**7** VIDEO IS BIGGER  
THAN YOU THOUGHT

**8** REMEMBER THE  
CHEWBACCA LADY?

**9** 15X MORE PHOTOS SHARED  
PER DAY THAN 5YRS AGO

**10** MESSAGING CONTINUING  
TO GROW, BIG TIME

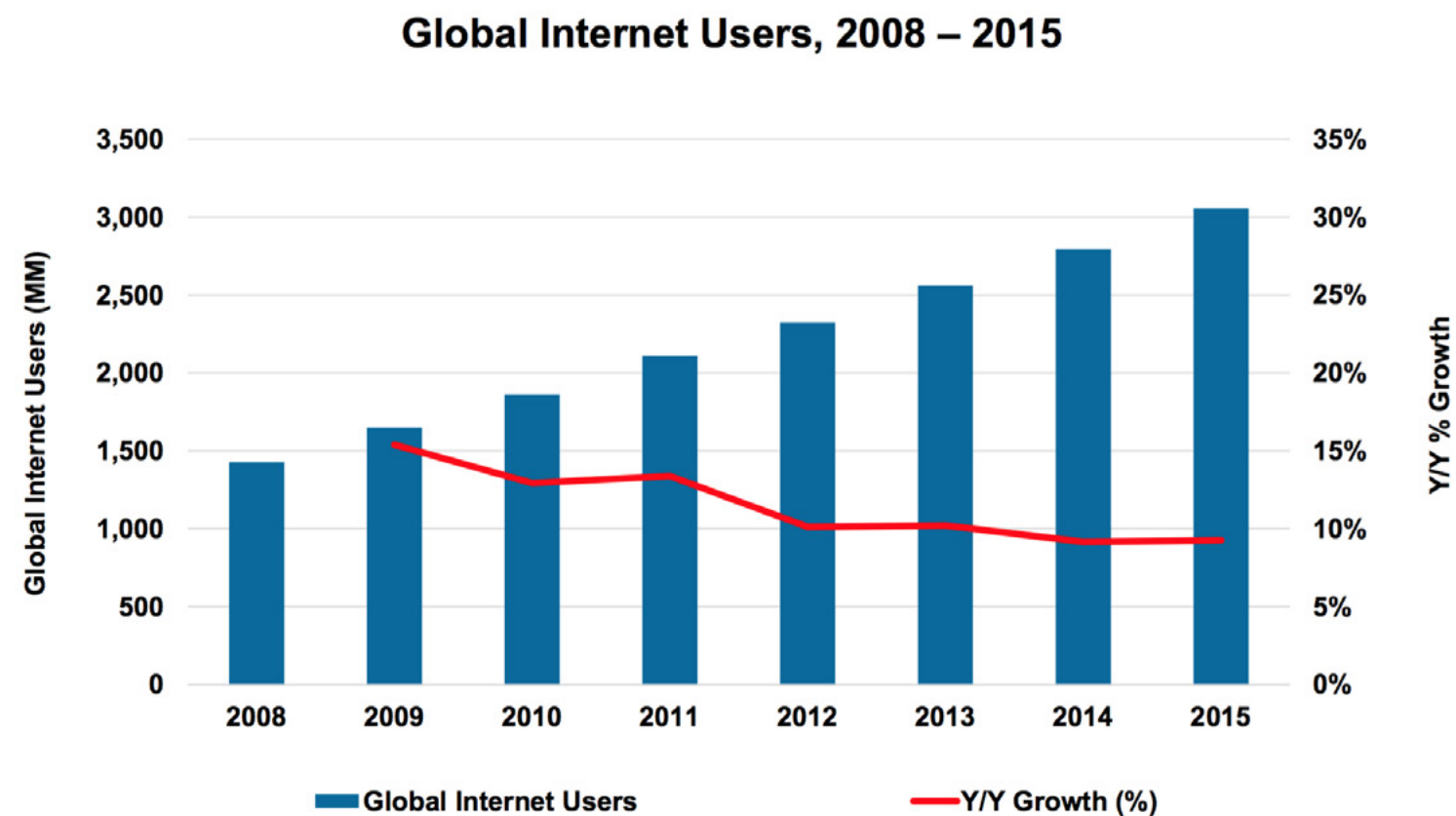
**11** SELF-EXPRESSION  
FOR ALL

**12** DUH: THOSE BORN AFTER 1981 PREFER  
CHAT AND SOCIAL TO PHONE AND EMAIL

# We're Not Even at 50%

# 1

GLOBAL INTERNET USERS = 3B @ 42% PENETRATION...  
9% VS. +9% Y/Y... +7% (EXCLUDING INDIA)

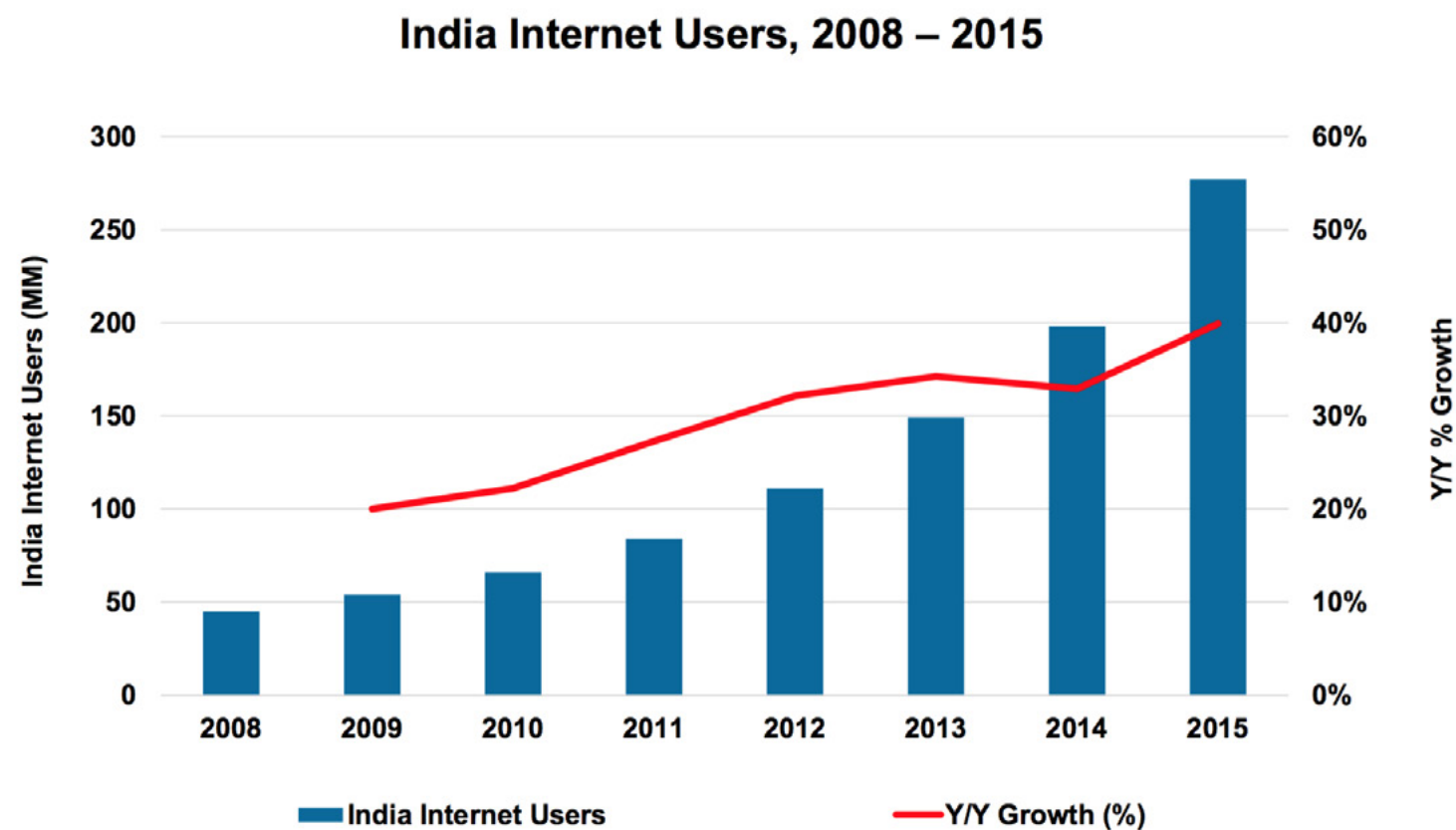


Hard to imagine (maybe not), but we haven't even reached the 50% mark for global internet users. You can probably see why **Facebook and Google** want to **deploy drones** to beam Internet to places like Africa. At present, North America, Europe, and China are largely saturated. India is up next, along w/ the rest of Asia Pacific.

# India Is the Next Major Market

# 2

INDIA INTERNET USERS = 277MM @ 22% PENETRATION...  
+40% VS. + 33% Y/Y



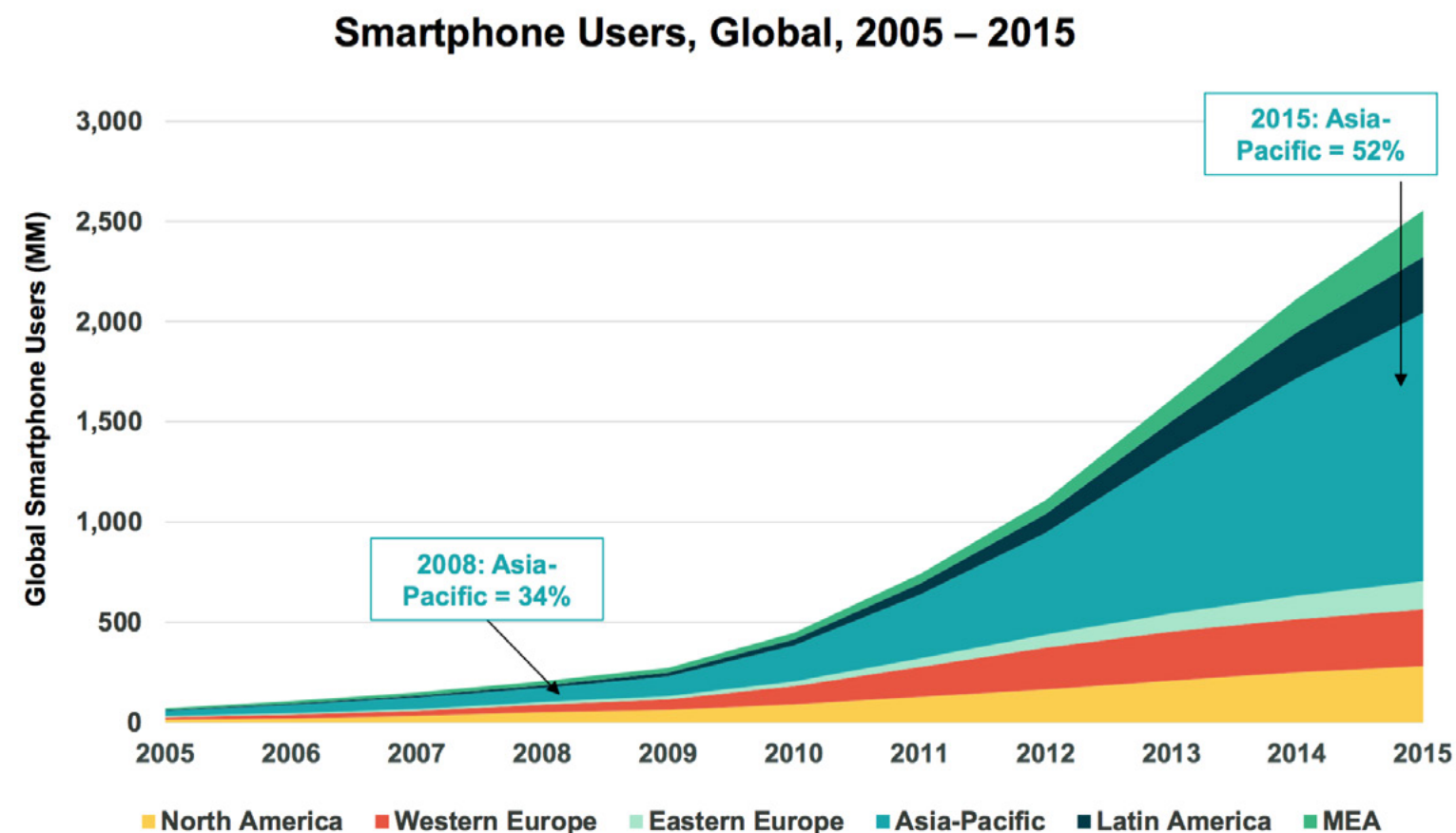
In 1995 there were 35M internet users, primarily in the US and western Europe. Today there are 3B, primarily because of China. India is up next. In fact, India recently surpassed the US to become the #2 global internet user market behind China, and its growth is continuing to accelerate (over 40% year-over-year). To give some perspective, at the end of 2015 only ~20% of India's population was connected. Five years ago the number was 7%.



# 50% of Global Smartphone Owners Are in Asia

3

GLOBAL SMARTPHONE USER GROWTH SLOWING...  
LARGEST MARKET (ASIA-PACIFIC) = +23% VS. +35% Y/Y



Global smartphone adoption may be slowing (currently at 21% year-over-year, globally), however as marketers we should be very aware of the fact that the US/Canada represent a small fraction of total smartphone users (somewhere around 10%). Currently, over 50% of global smartphone owners are in Asia.

# China and Asia Growth in a Picture

# 4

SHANGHAI AREA OVER PAST 2+ DECADES  
= ILLUSTRATES MAGNITUDE OF CHINA (& EMERGING ASIA) GROWTH

Shanghai, China,  
Pudong District

1987



2016



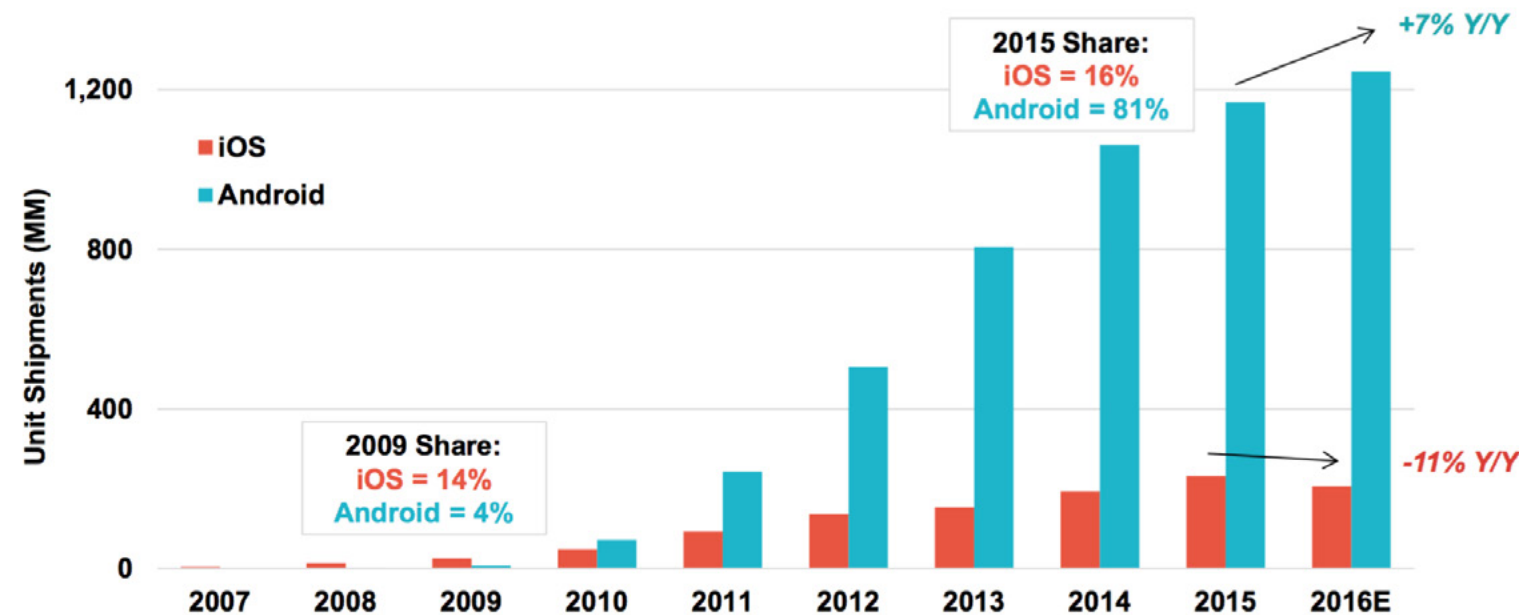
In 1985, over 63% of global GDP (\$19T, at the time) came from North America, Europe, and Japan. In 2015, 63% of global GDP (now \$114T) came from China and emerging Asia. To put it into perspective, below are photos of Shanghai, China taken in 1987 and 2016. The amount China spent on infrastructure alone in the last six years (2010-2016) surpasses what they spent in the previous 30 years (1980-2010).

# There Are 5X More Android Smartphones

5

ANDROID SMARTPHONE SHARE GAINS CONTINUE VS. IOS...  
ANDROID ASP DECLINES CONTINUE... DELTA TO IOS @~3X

Smartphone Unit Shipments, iOS vs. Android, Global, 2007 – 2016E



iOS ASP (\$)	\$594	\$621	\$623	\$703	\$712	\$686	\$669	\$680	\$717	\$651
Y/Y Growth	–	4%	0%	13%	1%	-4%	-2%	2%	5%	-9%

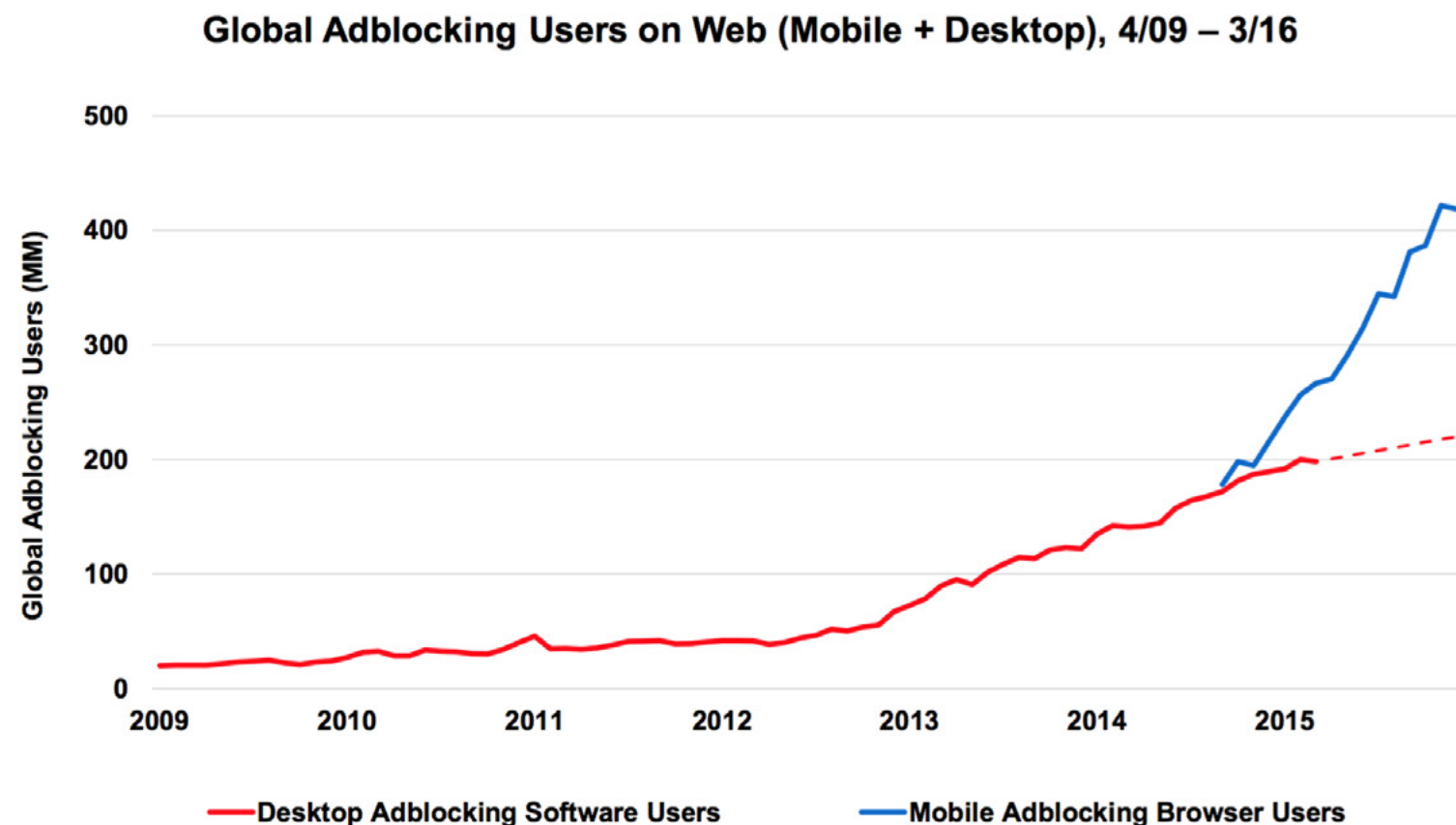
Android ASP	–	\$403	\$435	\$441	\$380	\$318	\$272	\$237	\$216	\$208
Y/Y Growth	–	–	8%	1%	-14%	-16%	-15%	-13%	-8%	-4%

As an Apple/iPhone customer for many years, it's hard to imagine that there are more than 5x as many Android phones being used globally. Further and for the first time ever, iOS phone shipments actually declined last year, while Android device shipments continued to grow by over 10%. Something we should all be thinking about vis a vis our mobile strategies.

# Adblock Usage Way up, Especially on Mobile

# 6

ADBLOCKING @ ~220MM DESKTOP USERS (+16% Y/Y)... ~420MM+MOBILE (+94%)...  
MAJORITY IN CHINA / INDIA / INDONESIA = CALL-TO-ARMS TO CREATE BETTER ADS, PER PAGEFAIR



If you're a marketer, chances are adblocking software hit your radar in the last year or two. A double digit percentage of internet users employ these solutions; some sites report ad block usage as high as 40%. Well, we have some bad news for paid advertisers: it's getting worse. There are now more people employing ad bloc solutions on their mobile devices than there are on the desktop. No wonder "native ads" are all the rage.

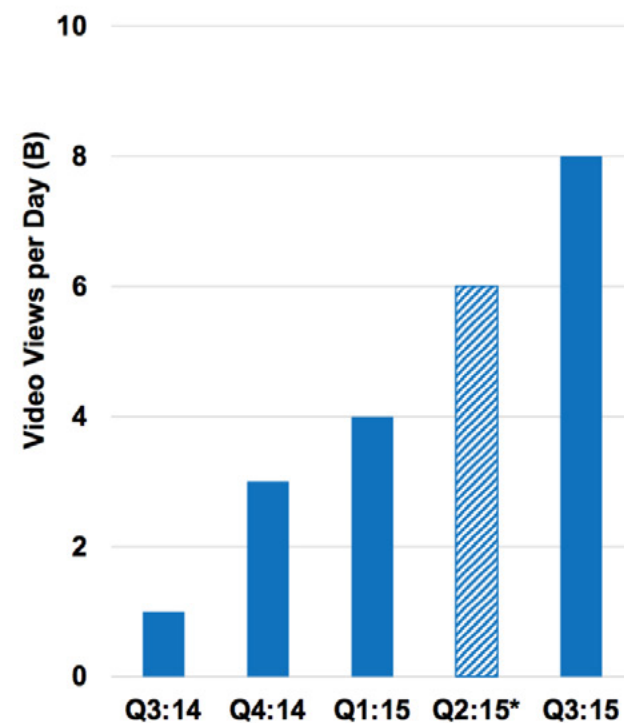


# Video Is Bigger Than You Thought

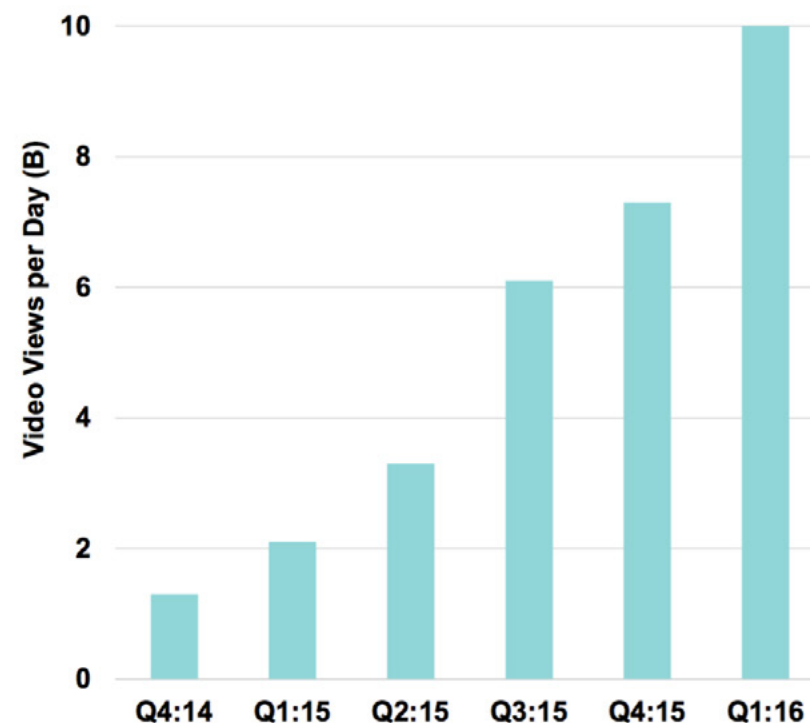
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USER-SHARED VIDEO VIEWS ON SNAPCHAT & FACEBOOK = GROWING FAST

**Facebook Daily Video Views,  
Global, Q3:14 – Q3:15**



**Snapchat Daily Video Views,  
Global, Q4:14 – Q1:16**



Consider this for a moment: there are 20% more video views per day on Snapchat than on Facebook. In total, Snapchat received 20B (that billion w/ a B) video views PER DAY in Q1 2016. Based on their growth, that likely means they've reached something like 12-13B views per day at present. Amazing.

# Remember the Chewbacca Lady?

# 8

UGC (USER GENERATED CONTENT) @ NEW ORDERS OF VIEWING MAGNITUDE...  
FACEBOOK LIVE = RAW / AUTHENTIC / ACCESSIBLE FOR CREATORS & CONSUMERS

## Candace Payne in Chewbacca Mask on Facebook Live

*Most Viewed Live Video @ 153MM+ Views, 5/16*  
*Kohl's = Mentioned 2 Times in Video*  
*Kohl's = Became Leading App in USA iOS App Store*  
*Chewbacca Mask Demand Rose Dramatically*



Candace Payne was live.  
It's the simple joys in life...  
Like · Share · May 19

Shared with: Public  
152,750,864 Views



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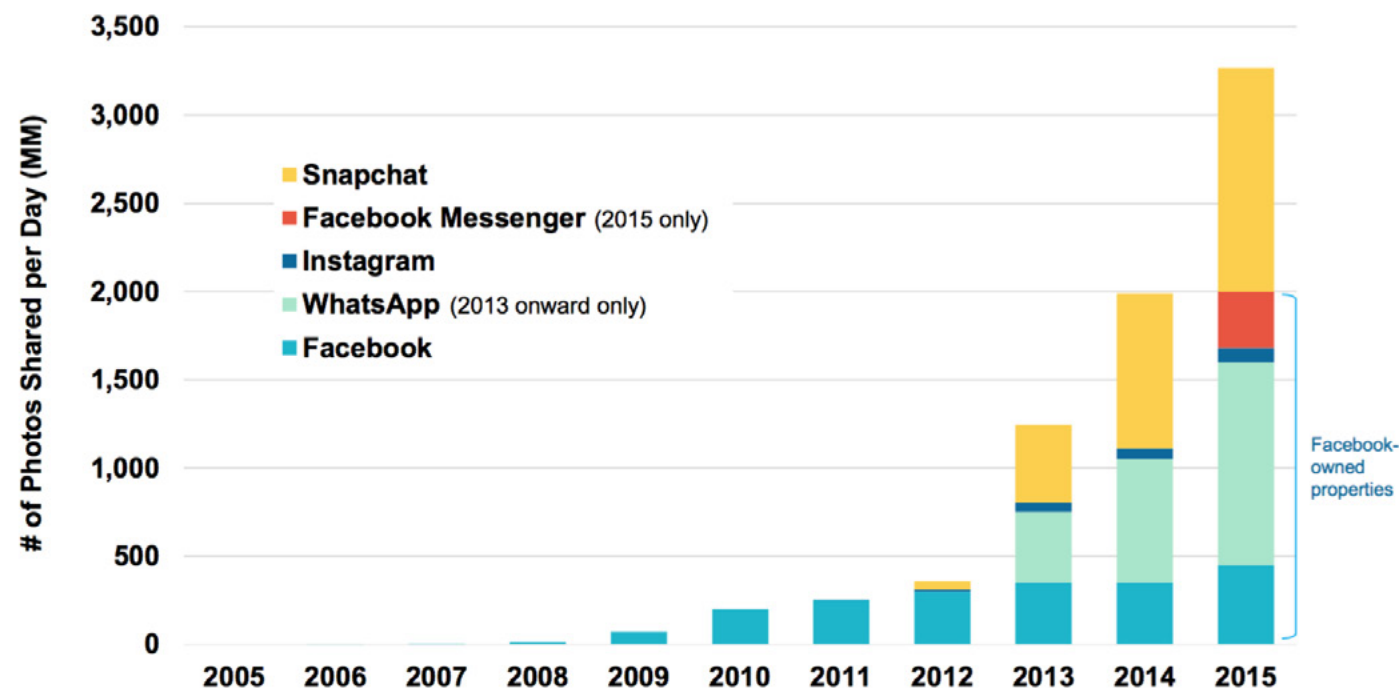
Remember that lady in the car wearing the Chewy mask? Well, it was the most viewed Facebook live video of all time, with over 153M views in ONE DAY. Further and because she mentioned Kohls a couple times, their app (the Khols app) rose to #1 in the US iOS store.

# 15x More Photos Shared Per Day Than 5yrs Ago

9

## IMAGE GROWTH REMAINS STRONG

Daily Number of Photos Shared on Select Platforms, Global, 2005 – 2015

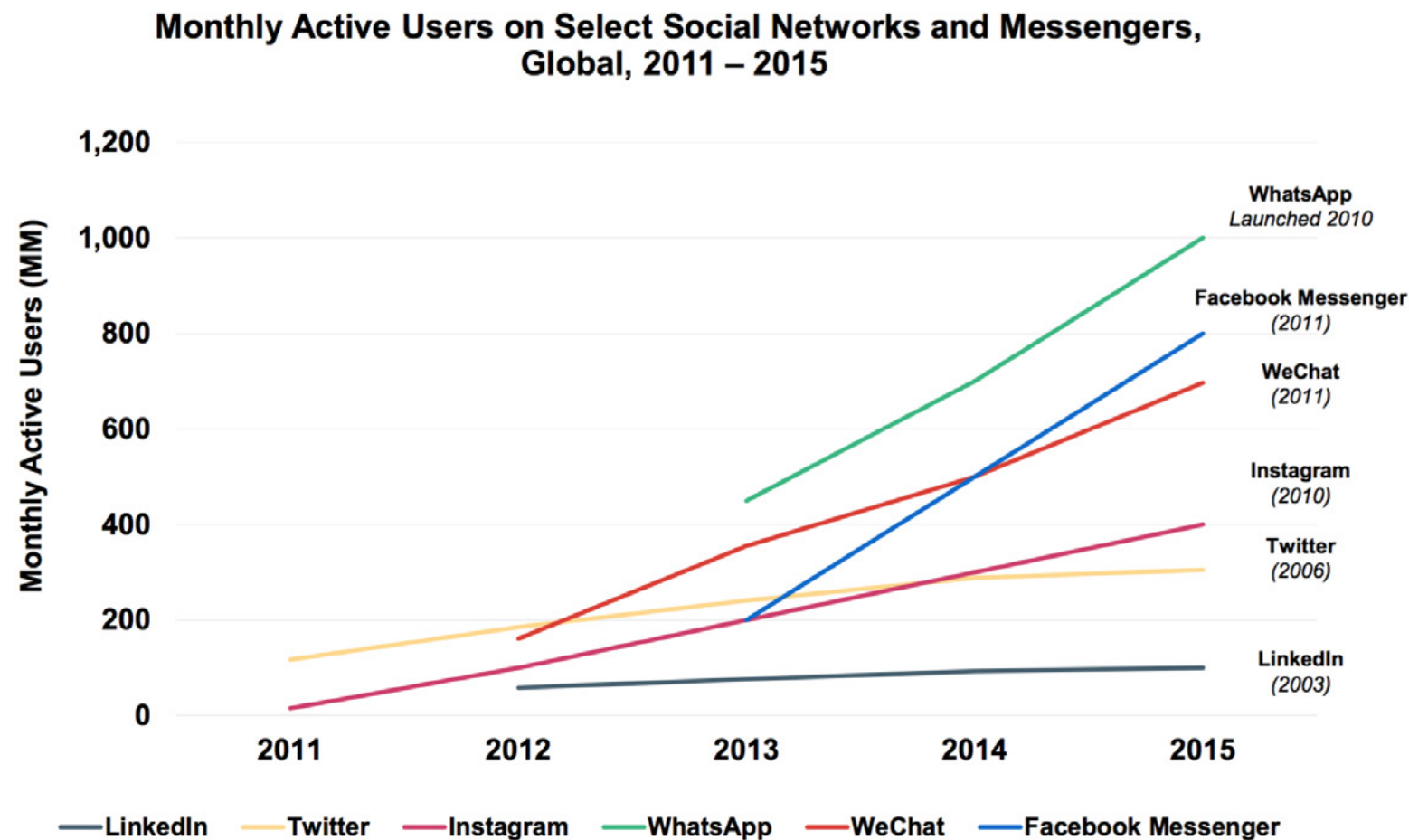


Visual mediums are dominating shared content on the internet and there are really only two companies that generate the bulk of shared photos: Facebook (Messenger, Instagram, WhatsApp) and Snapchat. Over 3.5B images are shared on a daily basis, up 15x from only five years ago. There should be no doubt in anyone's mind that the internet is becoming increasingly visual.

# Messaging Continuing to Grow, Big Time

# 10

MESSAGING CONTINUES TO GROW RAPIDLY...  
LEADER = WHATSAPP / FACEBOOK MESSENGER / WECHAT



Hard fact: Twitter and LinkedIn not only have the least number of monthly active users, combined they don't even reach the top three (WhatsApp, Facebook Messenger, and WeChat). While growth has largely plateaued with the former, the top three plus Instagram continue to see 25% annual growth. Remember when Facebook paid \$1B for Instagram? It's now worth >40x that.



# Self-Expression for All

MESSAGING PLATFORM EVOLUTION =  
MORE TOOLS FOR SIMPLE SELF-EXPRESSION

## Global Electronic Messaging Platforms – Evolution of Simple Self-Expression

Japanese Cell Phones – Type-  
Based Emoji  
1990s



AOL Instant Messenger –  
Convert Text Emoticon to  
Graphical Smiley  
1997



NTT DoCoMo-  
Emoji  
1999



Apple iOS 5 –  
Native Emoji  
2011



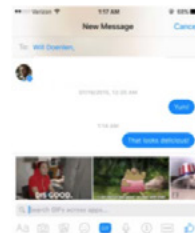
Line –  
Stickers  
2011



Bitstrips – Bitmoji  
Personalized Emoji  
2014



Facebook Messenger –  
GIF Keyboard  
2015



Snapchat –  
Lenses  
2015



Emojis are so five years ago. Heck, photo filters are so five years ago. Gifs and lenses are the new way to creatively express yourself on social and a great way for brands to insert themselves into conversations. Consider these numbers:

- 1 \_\_\_\_ Taco Bell Cinco de Mayo lens on Snapchat received over 224M views, with an average session time (amount of time a Snaphatter played with the lens) of over 20 seconds
- 2 \_\_\_\_ Gatorade Super Bowl lens on Snapchat garnered over 165M views w/ the same, 20 second average session time
- 3 \_\_\_\_ Iron Man Filter from MSQRD on Facebook garnered 8M views

# Duh: Those Born After 1981 Prefer Chat and Social to Phone and Email

# 12

BEST WAYS FOR BUSINESSES TO CONTACT MILLENNIALS =  
SOCIAL MEDIA & CHAT...WORST WAY = TELEPHONE

## Popularity of Business Contact Channels, by Age

*Which channels are most popular with your age-profiled customers?  
(% of contact centers)*

	% of Centers Reporting Most Popular Contact Channels by Generation				
	Internet / Web Chat	Social Media	Electronic Messaging (e.g. email, SMS)	Smartphone Application	Telephone
<b>Generation Y</b> (born 1981-1999)	24% (1 <sup>st</sup> choice)	24% (1 <sup>st</sup> choice)	21% (3 <sup>rd</sup> choice)	19% (4 <sup>th</sup> choice)	12% (5 <sup>th</sup> choice)
<b>Generation X</b> (born 1961-1980)	21% (3 <sup>rd</sup> choice)	12% (4 <sup>th</sup> choice)	28% (2 <sup>nd</sup> choice)	11% (5 <sup>th</sup> choice)	29% (1 <sup>st</sup> choice)
<b>Baby Boomers</b> (born 1945-1960)	7% (3 <sup>rd</sup> choice)	2% (5 <sup>th</sup> choice)	24% (2 <sup>nd</sup> choice)	3% (4 <sup>th</sup> choice)	64% (1 <sup>st</sup> choice)
<b>Silent Generation</b> (born before 1944)	2% (3 <sup>rd</sup> choice)	1% (4 <sup>th</sup> choice)	6% (2 <sup>nd</sup> choice)	1% (5 <sup>th</sup> choice)	90% (1 <sup>st</sup> choice)

Pretty simple: when contacting/communicating with a company, those born after 1981, those wonderful/elusive/confounding Millennials, prefer social media/internet/web chat to any other channel, chiefly phone, an app, or email. Social isn't simply an entertainment channel, it's increasingly becoming THE channel for communication, business, transactions, and everything else.

# It's a New World

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Let's get real for a minute. Global debt (especially government debt) has grown significantly: it's currently 3x what it was in 2000. Further, overall global debt is now 299% of global GDP. Couple that with slowing economic growth rates and we've got much slimmer margins for error. Easy growth, at least for the time being appears to be behind us.

However, where there are risks there are also opportunities. Specifically opportunities for businesses to innovate, improve efficiencies, pursue lower price models, create new types of jobs and products and technology and the internet are the drivers. One other with a connected global population, the time it takes for a new business/product/service to hit the size and scale of older players is significantly less.

As a marketer, these are the kinds of things we need to be aware of. Our obligation is to see where the puck is going, not simply reacting to where it is. That destination is where the opportunity is. Hopefully this ebook gives you some ideas. It has for us.

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DON'T HESITATE TO GET IN TOUCH WITH US! WE'RE HERE TO HELP.  
EMAIL US AT [INFO@EVERYONESOCIAL.COM](mailto:INFO@EVERYONESOCIAL.COM) WITH ANY QUESTIONS.