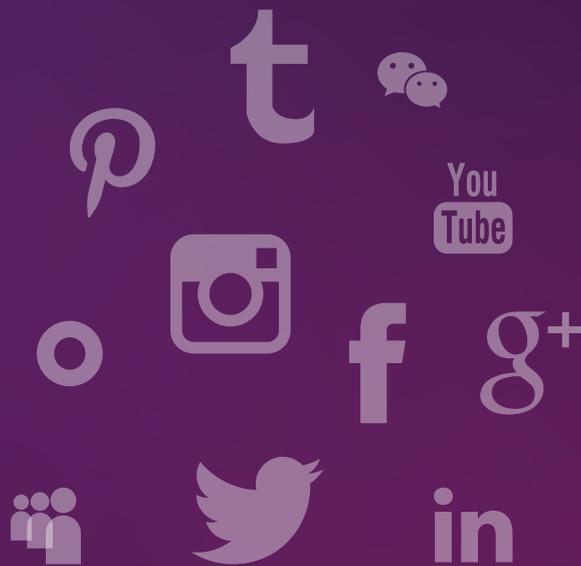


GWI Social Summary

Q2 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 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, looking at account ownership, visitor numbers, active usage and estimated audience sizes
- Track the fastest growing social networks and apps over the last six months
- Quantify the importance of mobiles, tablets and messaging services 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.

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.

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 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 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 (with 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. Japan is also excluded from charts relating to specific apps.

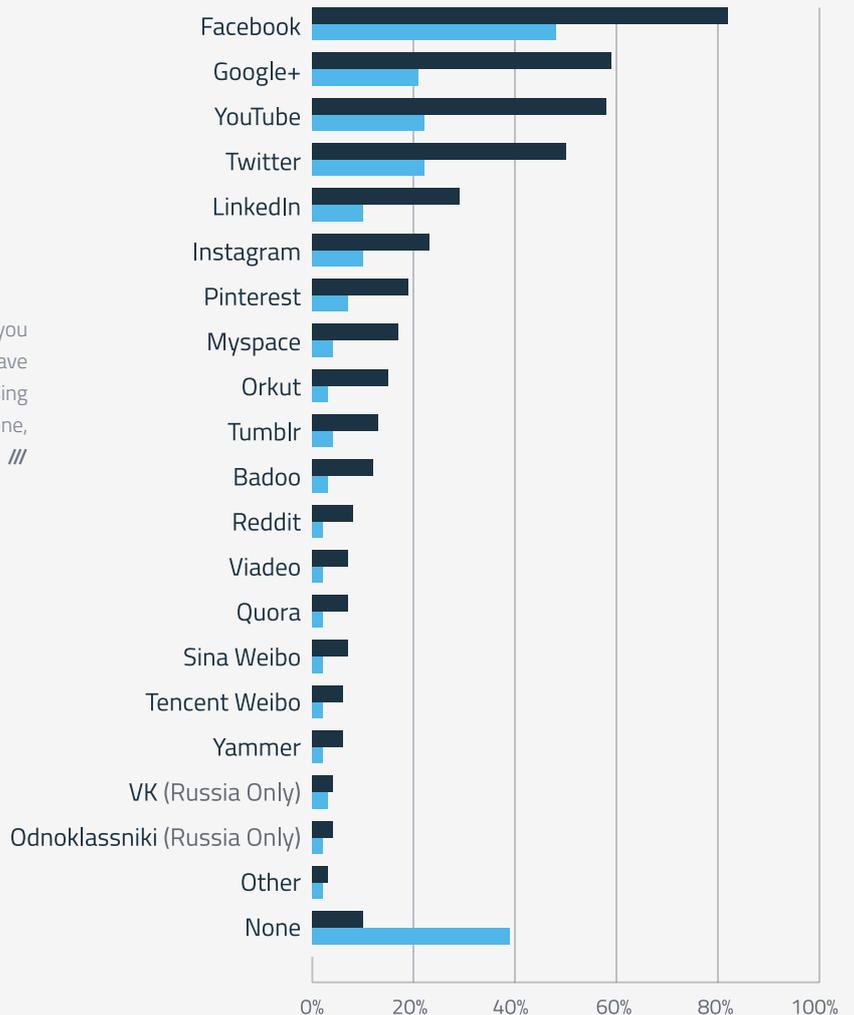
Facebook still top, but Instagram is the biggest riser

- Globally, **Facebook is still the number one 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.
- 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 members 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.

TOP 20 SOCIAL PLATFORMS: ACCOUNT OWNERSHIP AND ACTIVE USAGE

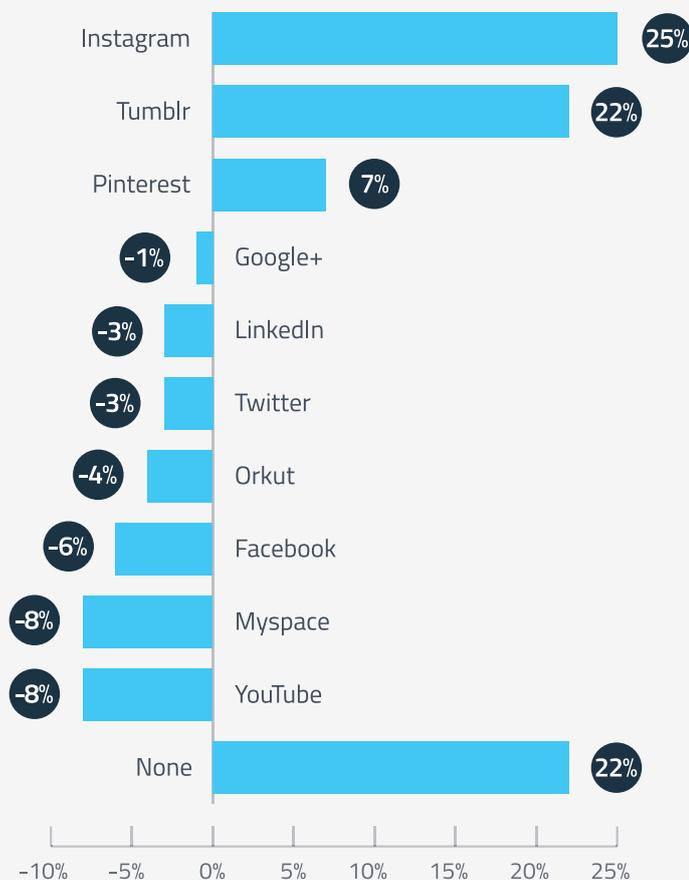
% internet users who have an account
 % internet users who actively use the site

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



- While Facebook's members and visitors continue to grow, active usage has seen a small decline: 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 out fewer actions once there.
- 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 rises.
- In China, networking is dominated by **Qzone, Sina Weibo and Tencent Weibo**, all of which have membership levels of 75%+. Over the last six months, 51.com recorded the biggest growth in active usage, with Youku, Qzone and Tudou rising too. Tencent Weibo and Sina Weibo saw declines, however.

TOP 10 SOCIAL PLATFORMS: CHANGES IN ACTIVE USAGE IN LAST SIX MONTHS

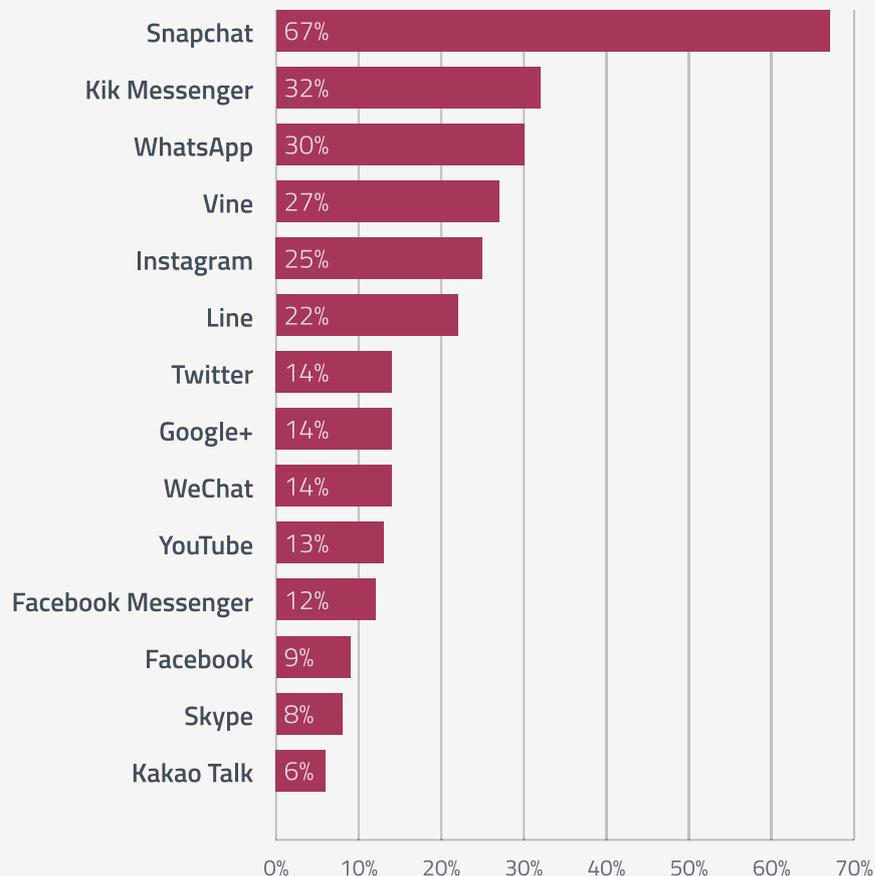


Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, Tablet, etc. // **Source:** GlobalWebIndex Q3 2013 - Q1 2014 // **Base:** Internet users aged 16-64, exc. China

Messaging apps growing quickly, led by Snapchat and WhatsApp

- **Facebook is still the number one social app outside of China;** 36% of internet users aged 16-64 now use it on a monthly basis.
- All social apps experienced growth in the last six months – including Facebook (+9%), YouTube (+13%), Twitter (+14%) and Google+ (+14%). But messaging services are growing at the fastest rate, with **Snapchat the biggest climber of all (+67%)**. Snapchat's total user base remains relatively small but it is performing particularly well in the US, UK, Ireland and Australia and it has enjoyed an especially strong rise among teens (+95%).
- Following its recent purchase, **WhatsApp has seen a healthy increase too (+30%)** and has now overtaken Facebook's own Messenger service to become the third most popular social app globally. It is used by just 3% of internet users aged 16-64 in the US but a much more substantial 50%+ in nations such as Hong Kong, South Africa and Malaysia – one of the reasons which would have made it such an attractive acquisition.
- In China, one social app is dramatically ahead of all the others tracked by GWI – with **WeChat** being used by an impressive 73% of the Chinese online population aged 16-64.

II SOCIAL APPS: GROWTH IN LAST SIX MONTHS



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

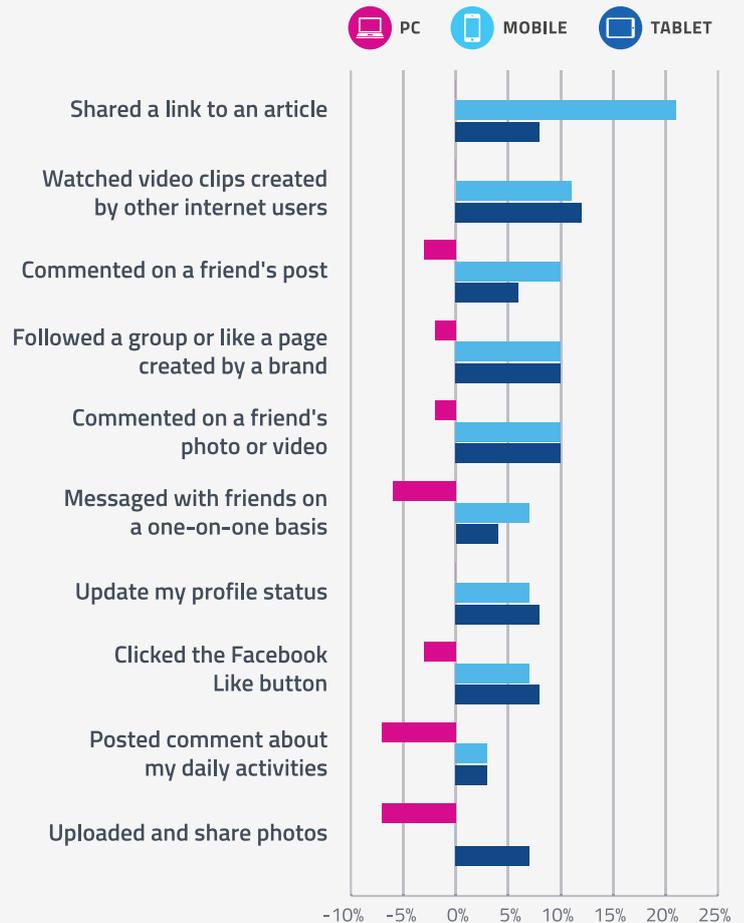
Source: GlobalWebIndex Q3 2013 - Q1 2014 /// **Base:** Internet Users aged 16-64, exc. China and Japan

Mobile networking continues to increase

- Over the last year, the percentage of internet users **accessing social networks via a mobile phone rose to 38%**. This is a 5% year-on-year increase which, due to the expanding size of the mobile internet audience over this period, translates to a 33% growth in user numbers.
- Tablets have been rising too** – up from 10% in late 2012 to 16% in early 2014 (representing a striking 94% rise in user numbers).
- For the top ten behaviors on Facebook, **audiences are growing via mobiles and tablets but holding steady or declining via PCs and laptops**. The latter are hardly being abandoned but this is yet more evidence of networking's increasingly "mobile-first" character.

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

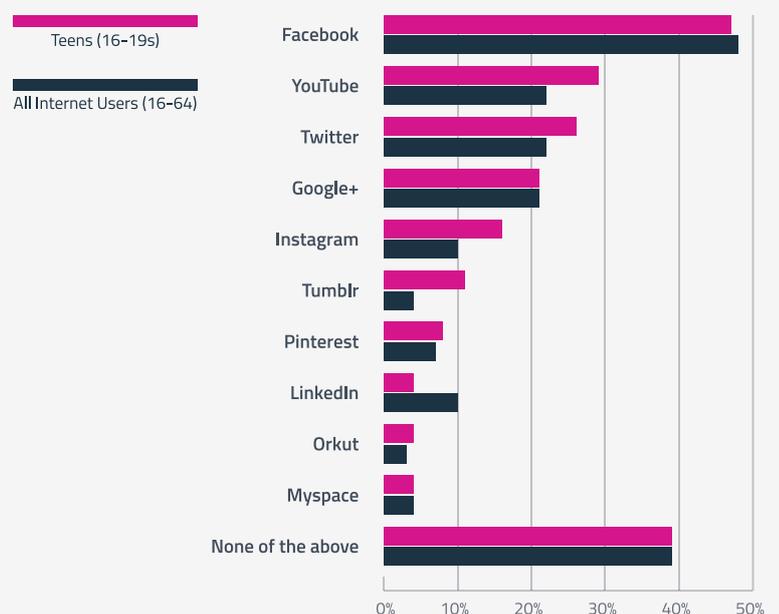
TOP FACEBOOK BEHAVIORS BY DEVICE: CHANGE IN LAST SIX MONTHS



Tumblr and Instagram have the youngest audiences

- Of the top ten global social platforms, **LinkedIn and Facebook have the oldest audiences:** just 52% and 55% of their respective active users come from the 16-34 group.
- 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.
- Teens (defined here as 16-19 year olds) 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.

TEEN USAGE OF THE TOP SOCIAL PLATFORMS



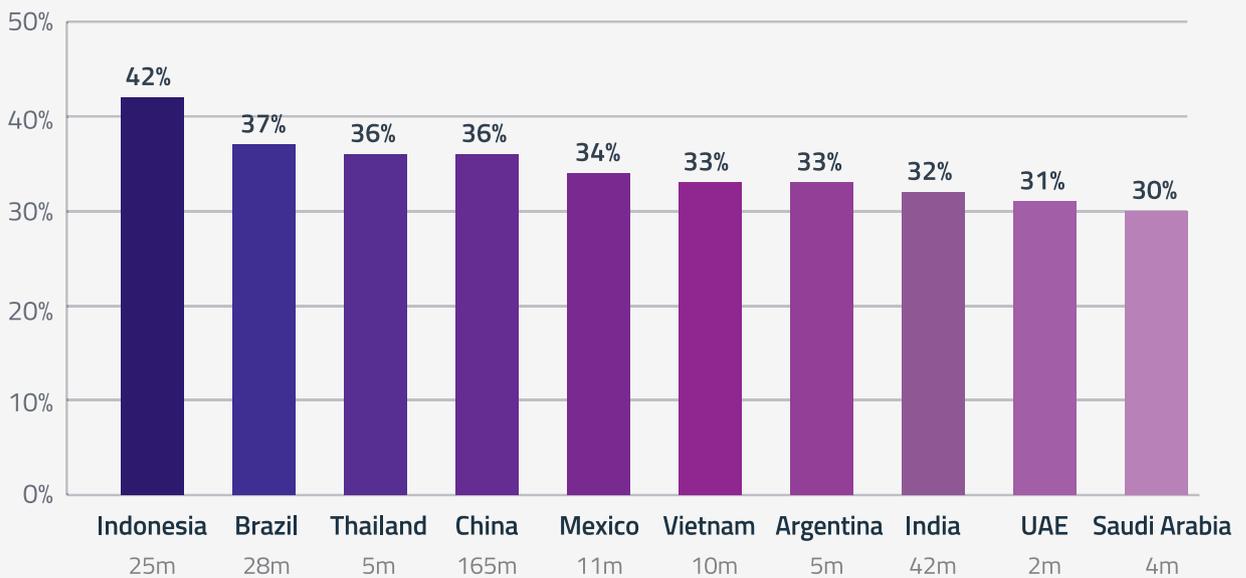
Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, Tablet, etc. // **Source:** GlobalWebIndex Q1 2014 // **Base:** Internet users aged 16-19 and 16-64, exc. China

VPNs are a major gateway for social networks

- Globally, **28% of internet users aged 16-64 say that they have used VPNs (virtual private networks) and Proxy Servers to go online.** Some 44% of this group report using them in order to access social platforms like Facebook and Twitter – a figure which translates to nearly 185 million people and means that large numbers of networkers will be incorrectly geo-located by passive web analytics.

- The countries where internet users are most likely to deploy VPNs and similar tools are Indonesia (42%), Brazil (37%), Thailand (36%) and China (36%). Significantly, **19% of VPN users in China say that the server they use is located in the USA** – one of the reasons why the sizes of the online and social audiences in America can be over-estimated and why the US 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).

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



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