globalwebindex

GWI Social

GlobalWebIndex’s flagship report
on the latest trends in social media

SUMMARY

FLAGSHIP REPORT Q3 2017

www.globalwebindex.net

Introduction

GWI Social provides the most important insights on the world of social media, from the very latest figures for social media engagement to the key trends within the social space and a comprehensive view of what social platforms are most popular. Among others, this report covers the following topics in detail:

- What audiences can be reached via social media and what devices are they using to access social.
- How much time per day are digital consumers devoting to social.
- How are the behaviors of social media users changing.
- What social platforms are most popular, among the total online population and key audiences.
- How are consumers using social media to engage with brands.
- How are social media services evolving as content and commerce platforms.

In this summary version, we highlight key insights and figures from our research. To read the full version of this report, start a free trial with GlobalWebIndex **here**.

Content

Definitions of Engagement

GlobalWebIndex defines consumer engagement with social platforms as:

MEMBERS – People who say they have an account on the platform in question.

VISITORS / USERS – People who say that, within the last month, they have visited or used a social network's website or app via any device.

ENGAGERS / CONTRIBUTORS – Members who say that, within the last month, they have actively engaged with or contributed to the platform in question.

Engagement is defined consistently across all platforms to allow for direct comparison but please note that the figures in this report are based on self-reported data – respondents are only classed as an engager/contributor if they believe they are. These figures should not be directly compared to "active users" or "MAUs" data given by social platforms, who use different methodologies and definitions to quantify this audience.

CHINA

China is excluded from most of the global charts featured in this report which track specific/named platforms. This is due to the unique nature of the Chinese social media industry, which maintains its own diverse ecosystem of homegrown social platforms and has official restrictions on many global social services. For detail on social media usage in China, see our special section on p.33 of this report and consult our **China Market Report**.

Notes on Methodology

ALL FIGURES IN THIS REPORT ARE DRAWN FROM **GLOBALWEBINDEX'S ONLINE RESEARCH AMONG INTERNET USERS AGED 16-64.**

PLEASE NOTE THAT WE ONLY INTERVIEW RESPONDENTS AGED 16-64 AND OUR FIGURES ARE REPRESENTATIVE OF THE **ONLINE POPULATION** OF EACH MARKET, NOT ITS TOTAL POPULATION.

OUR RESEARCH

Each year, GWI interviews over 350,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market,** we set appropriate quotas on **age, gender and education – meaning** that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please **download this document.**

INTERNET PENETRATION RATES ACROSS GWI'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, **the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated**. This is the case throughout much of LatAm, MEA and Asia Pacific.

ITU INTERNET PENETRATION METRIC 2016

Argentina	70.2	Hong Kong	87.3	Netherlands	90.4
Australia	86.5	India	29.5	New Zealand	88.5
Belgium	86.5	Indonesia	25.4	Nigeria	25.7
Brazil	59.7	Ireland	82.2	Philippines	55.5
Canada	89.8	Italy	61.3	Poland	73.3
China	53.2	Japan	92.0	Portugal	70.4
Egypt	39.2	Kenya	26.0	Russia	76.4
France	85.6	Malaysia	78.8	Saudi Arabia	73.8
Germany	89.6	Mexico	59.5	Singapore	81.0
Ghana	34.7	Morocco	58.3	South Africa	54.0

This table provides the latest estimates on internet penetration (defined as the number of internet users per 100 people) from the International Telecommunication Union for each market that GlobalWebIndex conducts online research in. Please note that this will reflect internet penetration among the total population, and that the figure among 16-64s is likely to be higher.

SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q2 2017 wave of research across 40 countries, which had a global sample size of 89,029 (with 72,529 surveys completed on PC/laptop/tablet and 16,500 surveys completed on mobile). The sample by market breaks down as follows:

Argentina	1510	Hong Kong	1257	Netherlands	1258	South Korea	1265
Australia	1262	India	3041	New Zealand	1274	Spain	2268
Belgium	1274	Indonesia	1785	Nigeria	750	Sweden	1255
Brazil	2281	Ireland	1271	Philippines	1532	Taiwan	1255
Canada	2295	Italy	2284	Poland	1266	Thailand	1520
China	8053	Japan	1754	Portugal	1321	Turkey	1512
Egypt	1299	Kenya	750	Russia	2273	UAE	1250
France	2276	Malaysia	1537	Saudi Arabia	1266	United Kingdom	7850
Germany	2336	Mexico	1555	Singapore	1521	United States	15946
Ghana	750	Morocco	750	South Africa	1528	Vietnam	1599

Social Media Engagement

KEY INSIGHTS

Being an internet user means being a social networker

98% of digital consumers are social media users and figures are high even among 55-64s (94%). An average of 2 hours and 15 minutes per day is spent on social networks and messaging – a figure that continues to increase across the markets we track.

Mobiles are the primary social device

The number accessing social platforms via mobile has seen a sharp increase and these devices now hold a 13 percentage-point lead over computers. Smartphones are facilitating on-the-go social engagement, with many dipping into different platforms throughout their day.

Multi-networking is firmly the norm

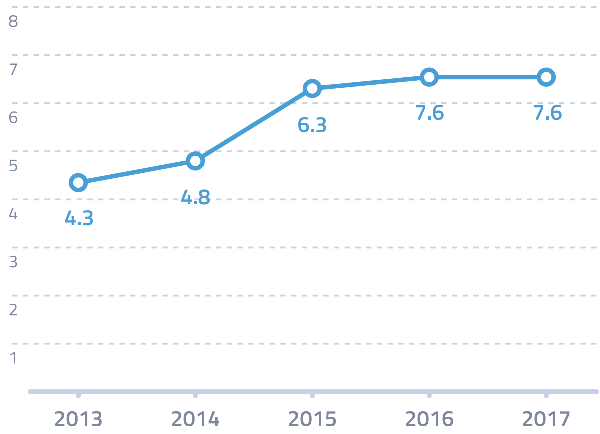
Digital consumers have an average of c.8 social media accounts, using each one for different networking behaviors. That said, we may soon reach peak multi-networking; 2017 was the first year we observed no appreciable growth in the average number of social media accounts per internet user.

Note: Average number of accounts is calculated based on analysis 42 named networks + "Other". The named networks are a mix of global players as well as those specific to certain countries or regions

MULTI-NETWORKING

Average number of social media account held by internet users

OVER TIME



MULTI-DEVICE USERS

7.8

MOBILE-ONLY USERS

5.7

REGION

Asia Pacific	8.1
Europe	6.3
Latin America	8.8
Middle East and Africa	7.6
North America	6.2

AGE

16 to 24	8.7
25 to 34	8.7
35 to 44	7.1
45 to 54	5.7
55 to 64	4.6

Social Behaviors

KEY INSIGHTS

News and entertainment are big reasons behind social media usage

As social networks have evolved into multi-media platforms, digital consumers are now almost as likely to use them for keeping up with the news as to stay in touch with friends. Filling up spare time is an important reason too, especially among 16-24s.

Social has an important role in purchase journeys

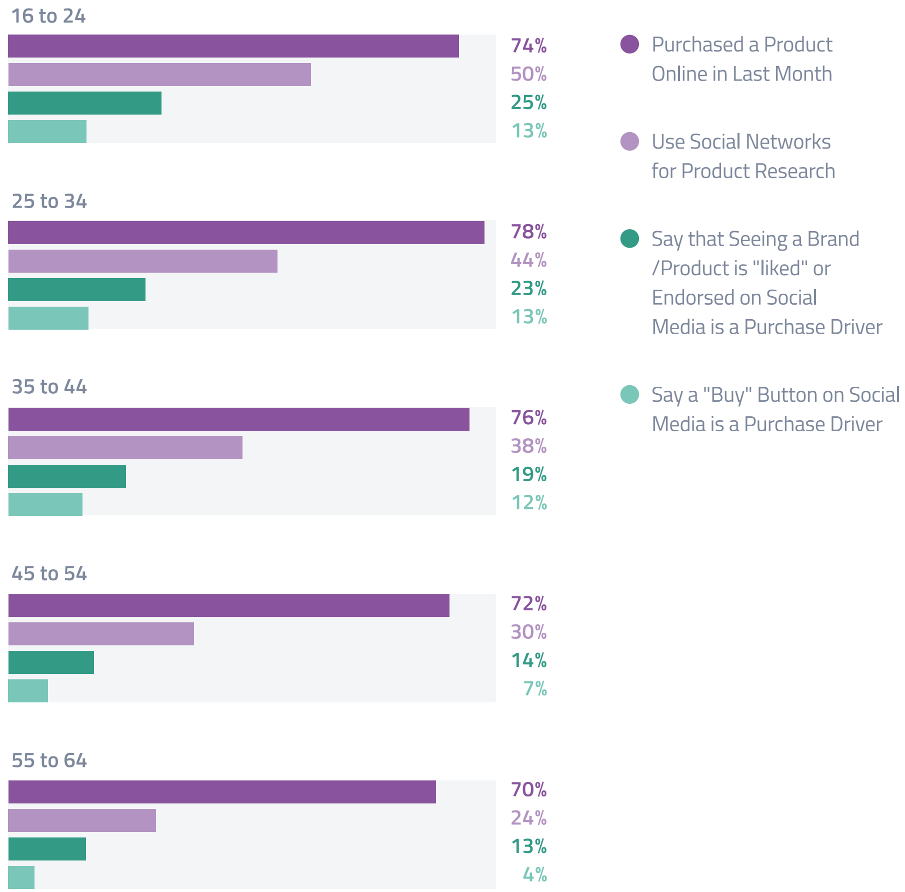
Over half of digital consumers are following brands and social networks are the top product research channel among 16-24s. There's still a disconnect between research and purchase though: even among 16-24s just 13% say a 'buy' button would encourage them to buy.

Video watching on social is now mainstream

Virtually all social networkers have watched a video clip online in the last month and a great deal of this is happening on social. 56% of Facebookers have watched one on their network, as have about 4 in 10 Snapchatters and Instagrammers.

THE POTENTIAL FOR SOCIAL COMMERCE

% of internet users who fall into the following groups



Question: In the past month, which of the following things have you done on the internet via any device? // Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? // When shopping online, which of the following things would increase your likelihood of buying a product? | **Source:** GlobalWebIndex Q2 2017 | **Base:** 72,529 (purchasing & purchase drivers) & 89,029 (research) Internet Users aged 16-64

PRO Platform: Marketing Touchpoints >Online Product Research

EXPLORE THE DATA

The Social Media Landscape

KEY INSIGHTS

Facebook dominates the social landscape

90% are a member of at least one of its four main services and Facebook itself can boast of having the most members. YouTube takes top position for visitation/usage, while Instagram is now ahead of Twitter among 16-44s.

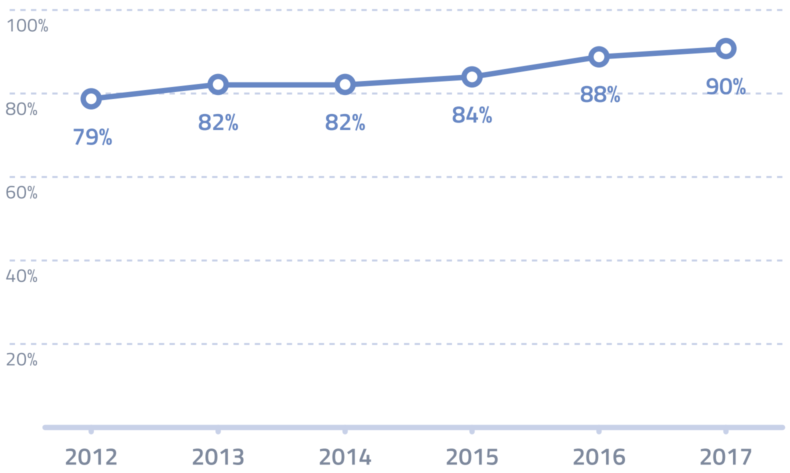
Facebook Messenger and WhatsApp are the top messaging services

Both are being used by over 50% of internet users. Snapchat usage is modest for all internet users but posts much higher figures among Gen Z (36%) – especially among those in North America where it's the top messaging service.

ENGAGEMENT WITH FACEBOOK SERVICES

% who have an account on Facebook, Facebook Messenger, WhatsApp or Instagram

OVER TIME



REGION

Asia Pacific (exc. China)	90%
Europe	87%
Latin America	96%
Middle East and Africa	97%
North America	89%

AGE

16 to 24	95%
25 to 34	94%
35 to 44	90%
45 to 54	85%
55 to 64	78%

Question: On which of the following services do you have an account? | **Source:** GlobalWebIndex 2012 - 2017 (averages conducted across each wave of research)
Base: 57,077 (2012), 148,826 (2013), 159,964 (2014), 183,842 (2015), 188,189 (2016) & 162,095 (2017) Internet Users aged 16-64 from outside China

PRO Platform:
Social Media > Members

EXPLORE THE DATA

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REPORTS

FLAGSHIP REPORTS
Our flagship reports present insights and statistics on social networking, device usage, online purchasing and entertainment.

MARKET & REGION REPORTS
Tracking key digital behaviors and engagement rates at a national or regional level, providing the very latest headline figures as well as looking at trends over time and across demographics.

AUDIENCE REPORTS
In-depth examinations of particular groups, assessing their most important behaviors and motivations as well as what sets them apart from the wider online population.

INSIGHT REPORTS
Deep-dives into some of the most pressing topics for marketers, from traditional vs digital media consumption to audience measurement issues.

TREND REPORTS
Tracking the stories of the moment, from ad-blocking and live streaming to VPNs and multi-networking.

INFOGRAPHICS
One-page visual summaries of key services, behaviors & audiences.

To see all of our available reports

CLICK HERE

PLATFORM

The questions and data-points featured in this report are available to explore on our Platform. They can be analyzed by any audience, date range or selection of countries/regions, with users able to build bespoke audiences based on our wide range of demographic, attitudinal and behavioral variables.

Each chart is accompanied by a hyperlink which will take you to the appropriate section on our Platform; simply click on the relevant link to start exploring the data further.

CLICK HERE *To start a Platform free trial*

GWIQ

GWIQ offers clients the ability to create bespoke audiences on the platform by connecting the GWI panel and passively monitored visitation to their own websites/campaigns. Segment your visitors by the actions taken on your site then profile them utilizing the 100% declared data you already find in our Platform. Validate digital campaigns against rich targets far beyond demographics. Understand the impact of digital campaigns on brand perceptions by sending bespoke advertising effectiveness surveys to panelists using a control vs exposed methodology.

CLICK HERE *To find out more about GWIQ*

GWI CUSTOM

GlobalWebIndex can also offer a variety of custom solutions to suit all your data and insight needs. All projects are conducted in close consultation with clients and resulting data is available for analysis in our Platform.

Our Custom offerings include:

BRAND SOLUTIONS
Brand Health
Brand Tracker
Brand Profiling

PRODUCT SOLUTIONS
Usage and Attitudes
Price Point
Platform Testing
Concept Testing

CAMPAIGN & AUDIENCE SOLUTIONS
Segmentation
Campaign Measurement
Audience Profiling
Audience Targeting

CLICK HERE *To find out more about GWI Custom*

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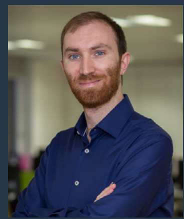

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