globalwebindex

# GWI Social

GlobalWebIndex's quarterly report on the latest trends in social networking

## SUMMARY

FLAGSHIP REPORT Q1 2017
www.globalwebindex.net

# Introduction

GWI Social examines the very latest figures for social media engagement, social behaviors and trends within the social space.

Drawing on data from our most recent wave of research among over 50,000 internet users aged 16-64, we offer insights on:

- The reach of social media across markets and demographics
- Time spent per day on social platforms
- The most popular services, globally and by country
- Consumer behaviors on social media
- The latest trends within the social space

In this summary version, we highlight key insights and figures from our research.

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# Content

# Terminology

Across most of the biggest social platforms, GlobalWebIndex monitors engagement in three main ways:

**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.

These metrics are applied consistently across all services, which allows like-for-like comparisons, but it's important to note that these types of engagement are reported from the perspective of the consumer. As a result, they will only class themselves as an engager or contributor if they believe that to be the case, and that can be quite different to the criteria which might be used in passive techniques to qualify the same audience. Given that networks have differing definitions for "active users" or "MAUs", we do not track this explicitly. Broadly speaking, however, our "Visitor / User" metric is likely to be the closest equivalent to how most networks would define their "active users".

## CHINA

In addition to using local networks, it's clear that significant numbers of internet users in China are connecting to major global platforms such as Facebook via VPNs, Proxy Servers and other tools. However, due to the sheer scale of the Chinese market, its high number of local social networks and the official restrictions it places on global platforms such as Facebook and Twitter, **China is excluded from most of the global charts featured in this report which track specific/ named platforms** (see the base of each one for confirmation).

# Notes on Methodology

Each year, GWI interviews over 350,000 internet users, asking a wide range of questions about their lives, lifestyles and digital behaviors.

To ensure that our research is reflective of internet users, 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.

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America 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. 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.**

Please keep in mind that **all figures given in this report relate to the country's internet users, not to its total population.**

Where data refers to Q4 2016 and Q1-Q4 2016, it is based on the following sample sizes:

## INTERNET PENETRATION RATES

(ITU INTERNET PENETRATION METRIC 2015)

| | | | |
|---|---|---|---|
| Japan | 93% | Malaysia | 71% |
| Netherlands | 93% | Saudi Arabia | 70% |
| UK | 92% | Argentina | 69% |
| UAE | 91% | Portugal | 69% |
| Sweden | 91% | Poland | 68% |
| South Korea | 90% | Italy | 66% |
| Canada | 88% | Brazil | 59% |
| Germany | 88% | Mexico | 57% |
| Belgium | 85% | Turkey | 54% |
| Hong Kong | 85% | Vietnam | 53% |
| France | 85% | South Africa | 52% |
| Australia | 85% | China | 50% |
| Singapore | 82% | Philippines | 41% |
| Taiwan | 82% | Thailand | 39% |
| Ireland | 80% | Egypt | 36% |
| Spain | 79% | India | 26% |
| United States | 75% | Indonesia | 22% |
| Russia | 73% | | |

## SAMPLE SIZE BY MARKET

Q4 2016 SAMPLE SIZES

| | | | |
|---|---|---|---|
| Argentina | 762 | Philippines | 769 |
| Australia | 765 | Poland | 764 |
| Belgium | 775 | Portugal | 759 |
| Brazil | 1518 | Russia | 1251 |
| Canada | 1507 | Saudi Arabia | 763 |
| China | 7553 | Singapore | 764 |
| Egypt | 785 | South Africa | 755 |
| France | 2017 | South Korea | 759 |
| Germany | 2033 | Spain | 2014 |
| Hong Kong | 751 | Sweden | 761 |
| India | 2520 | Taiwan | 751 |
| Indonesia | 770 | Thailand | 767 |
| Ireland | 1008 | Turkey | 759 |
| Italy | 2013 | UAE | 758 |
| Japan | 1518 | UK | 7505 |
| Malaysia | 767 | USA | 7528 |
| Mexico | 764 | Vietnam | 761 |
| Netherlands | 754 | | |

## SAMPLE SIZE BY MARKET

Q1-Q4 2016 SAMPLE SIZES

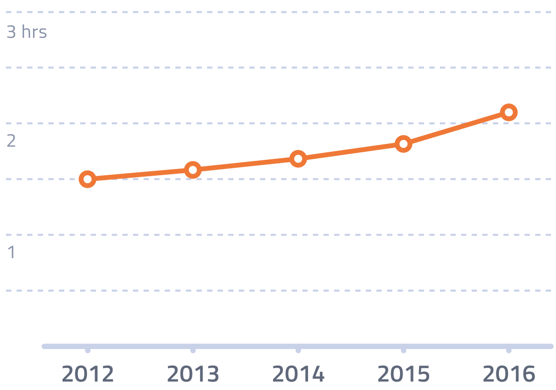
| | | | |
|---|---|---|---|
| Argentina | 3028 | Philippines | 3073 |
| Australia | 3022 | Poland | 3030 |
| Belgium | 3153 | Portugal | 3032 |
| Brazil | 4528 | Russia | 5109 |
| Canada | 6015 | Saudi Arabia | 3023 |
| China | 22834 | Singapore | 3014 |
| Egypt | 784 | South Africa | 3028 |
| France | 8024 | South Korea | 3029 |
| Germany | 8098 | Spain | 8044 |
| Hong Kong | 3013 | Sweden | 3027 |
| India | 6325 | Taiwan | 3029 |
| Indonesia | 3045 | Thailand | 3069 |
| Ireland | 4040 | Turkey | 3075 |
| Italy | 8040 | UAE | 3063 |
| Japan | 4018 | UK | 30264 |
| Malaysia | 3044 | USA | 30107 |
| Mexico | 3120 | Vietnam | 3057 |
| Netherlands | 3064 | | |

# Engagement with Social Networking

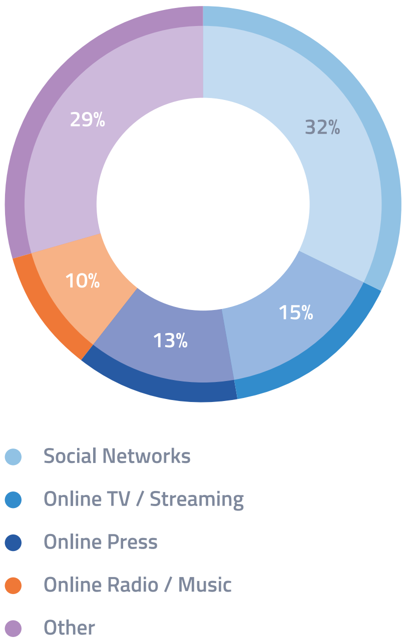
## Which groups are the most enthusiastic about social media and how are they engaging with social services?

### TIME SPENT SOCIAL NETWORKING

Daily Average (Hours : Minutes)




### SOCIAL NETWORKING AS A SHARE OF ONLINE TIME (2016)




### KEY HEADLINES

- **Almost every internet user can now be reached via social media** - 94% of digital consumers aged 16-64 say they have an account on at least one social platform and 98% have visited/used one within the last month.

- **Filling up spare time is the main reason for using social media among 16-24s,** while older groups see these platforms as a way to keep up with friends and the news. These motivations highlight the rise of 'passive networking' but also reinforce the potential of social to be a space where consumers can engage with content.

- **In all markets and across all the major demographics groups, daily time spent on social continues to rise with each year that passes.** Globally, around **1 in every 3 minutes spent online is devoted to social networking and messaging,** with digital consumers engaging for a daily average of over 2 hours (rising to 2 hrs 40 mins among 16-24s).

- **Mobiles are now the primary social device.** 78% of the internet population aged 16-64 are now networking via a mobile, while each quarter that passes sees fewer and fewer turning to PCs and laptops to access social media.

**Question:** Roughly how many hours do you spend on/engaged with social networks/services each day? | **Source:** GlobalWebIndex 2012-2016 (averages across all waves of research conducted in each year) | **Base:** Internet users aged 16-64

**PRO Platform:** Social Media > Time Spent on Social Networks or Services

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# Top Social Platforms and Services

## Which social media platforms are performing the best?

### KEY HEADLINES

- **Facebook remains the king of the social media landscape** – 88% of internet users have an account on at last one of the company's platforms and usage of Facebook is near universal in some key fast-growth markets (like India and Indonesia) where clear opportunities exist for new internet users to drive Facebook user growth.

- **While Facebook remains the top network for membership (84%), YouTube edges ahead for visitors (88%).** In the battle of the messaging services, Facebook Messenger (52% used this app) has a lead over WhatsApp (48%) outside of China but WeChat is absolutely dominant within the Chinese social media industry.

- By some distance, it's **WhatsAppers and Facebookers that post the best figures for usage frequency** – 80% of these audiences use their platform at least daily. Usage frequency on WeChat is also striking – within China, 86% of WeChatters are accessing daily.

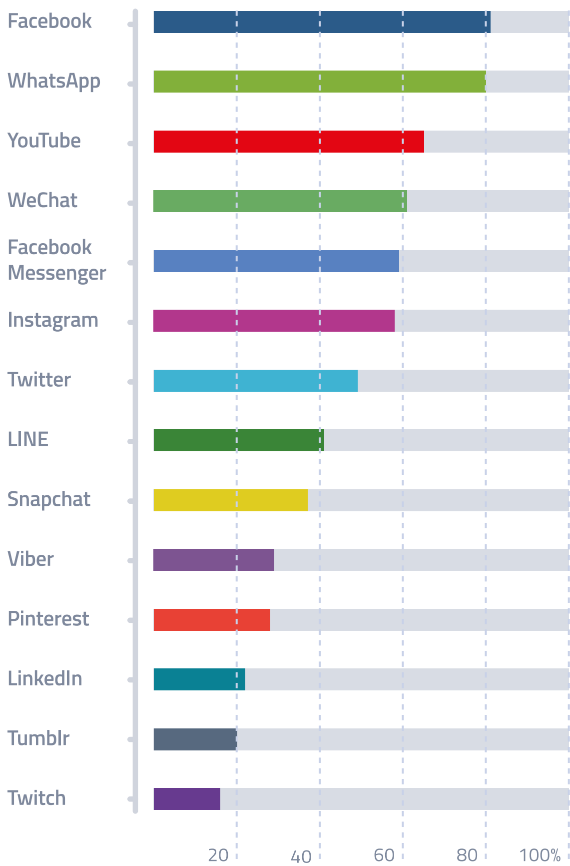
- **Instagram and Twitter now post equal figures for visitation/usage** and Instagram can claim a 10+ point advantage in 6 markets and a lead in a total of 21 markets. That it has the lead among the key 16-34 age group shows the strength of its prospects.

- **Within the messaging app space, market-by-market differences are essential to understand.** WeChat is dominant in China, LINE controls Japan and Kakao Talk is powerful in South Korea. In most other markets, Facebook Messenger and WhatsApp dominate but often one app is significantly more popular than the other.

- **Focus on Gen Z (16-20s) and Snapchat posts usage rates of more than 50% in 13 of the 34 markets in our chart.** Snap Inc. can also claim that it's service is the most popular messaging app among Gen Z in the USA.

### FREQUENCY OF USAGE

% of users who use each service at least daily




**Question:** Thinking about the social platforms that you actively engage with or contribute to, can you please tell us how often you typically use each one? More than once a day, Daily | **Source:** GlobalWebIndex Q4 2016 | **Base:** Engagers / Contributors aged 16-64, exc. China (except for WeChat, which includes China)

**PRO Platform:**
Social Media > Usage Frequency

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# Social Trends

## What are the most important trends impacting the world of social?

### KEY HEADLINES

▪ **The average internet user now has about 8 social accounts, up from only 3 in 2012.** 16-24s and social networkers in APAC lead this trend, which is being driven by the breadth of choice within the social space and users' willingness to turn to different platforms for distinct social activities.

▪ **The so-called 'context collapse' is occurring.** Usage on the major networks is becoming more passive, as users choose to browse rather than contribute content. But almost all members of the major networks are using their sites monthly, enabling ads to be served and revenue generated accordingly.

▪ **Video presents a major opportunity for social media and has been quick to make an impact.** Already, over half of Facebookers are watching video on the platform, with healthy figures seen across other major platforms.

▪ **Educating consumers about the benefit of social commerce will be key to establishing the lucrative revenue streams that could arise from this trend.** Currently, digital consumers are comfortable using social in the research phase of their purchase journey but are still reticent about buying directly via these platforms. The rise of chat bots could have a decisive impact here.

### THE POTENTIAL FOR SOCIAL COMMERCE

% of internet users who fall into the following groups

| Statement | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| 16 to 24 | 74% | 43% | 23% | 15% |
| 25 to 34 | 80% | 38% | 23% | 16% |
| 35 to 44 | 79% | 35% | 19% | 11% |
| 45 to 54 | 73% | 28% | 16% | 7% |
| 55 to 64 | 70% | 19% | 13% | 7% |

1. *Purchased a Product Online in Last Month*
2. *Use Social Networks for Product Research*
3. *Say that Seeing a Brand/Product is "liked" or Endorsed on Social Media is a Purchase Driver*
4. *Say a "Buy" Button on Social Media is a Purchase Driver*

**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 Q4 2016 | **Base:** 56,767 Internet users aged 16-64

**PRO Platform:** Marketing Touchpoints > Online Product Research

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## REPORTS

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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.

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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.

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

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## PRO PLATFORM

The questions and data-points featured in this report are available to explore on PRO 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 PRO Platform; simply click on the relevant link to start exploring the data further.

CLICK HERE *To start a PRO 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 the PRO 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 PRO 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
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Audience Profiling
Audience Targeting

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