globalwebindex

Social

GlobalWebIndex's **flagship report** on the latest trends in social media

SUMMARY

H1 2018

www.globalwebindex.com

Introduction

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 which social platforms are most popular. Among others, this report covers the following topics in detail:

- How much time per day are digital consumers devoting to social?
- How are the behaviors of social media users changing?
- Which 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 report summary, we highlight key insights and figures from our research. The full version of our report includes additional sections, such as a breakdown of the social media landscape by social platform and market-by-market statistics.

Social Behaviors

Why do digital consumers use social media and what are they doing on these platforms?

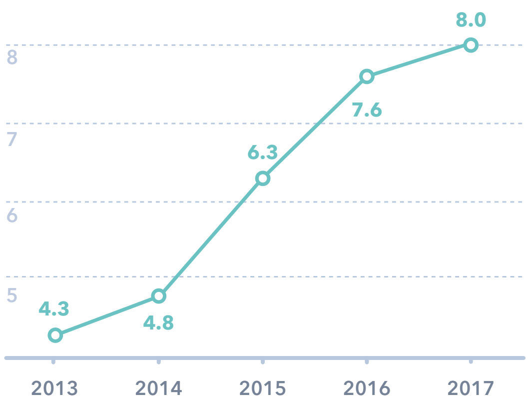
Key Headlines

- **The role that social media plays in the lives of its users has evolved.** Digital consumers are now almost as likely to say they use social to follow the news as they are to identify it as a platform for keeping in touch with friends (40% vs 41%).
- **Almost 4 in 10 internet users say they are following their favorite brands on social, while 1 in 4 are following brands from which they are thinking of making a purchase from.**
- **Influencer marketing makes the most impact among 16-24s**, but even among this age group it's just 18% who say they find new brands via celebrity or influencer endorsements.
- **Social commerce is gaining traction primarily in the research and brand interaction stages of the purchase journey.** But when it comes to the final purchase, the appetite to do so in these platforms remains low and most are moving to a retail site to do so.

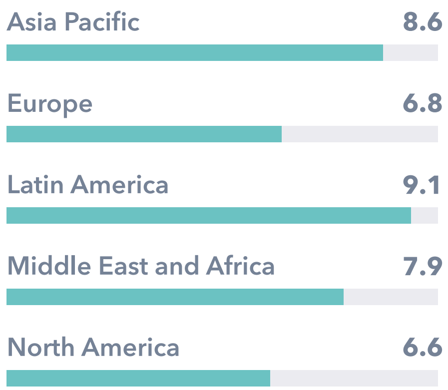
MULTI-NETWORKING

Average number of social media accounts held by internet users

Over time - global average



By Region - 2017



Note: Average number of accounts is calculated based on analysis of 44 named networks + "Other". Of the 44 individual platforms, 23 are global and 21 are specific to certain countries or regions

Question: On which of the following services do you have an account?
Source: GlobalWebIndex 2012 - 2017 (averages conducted across each wave of research)
Base: 61,196 (2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016) & 370,051 (2017) Internet Users aged 16-64

Social Media Engagement

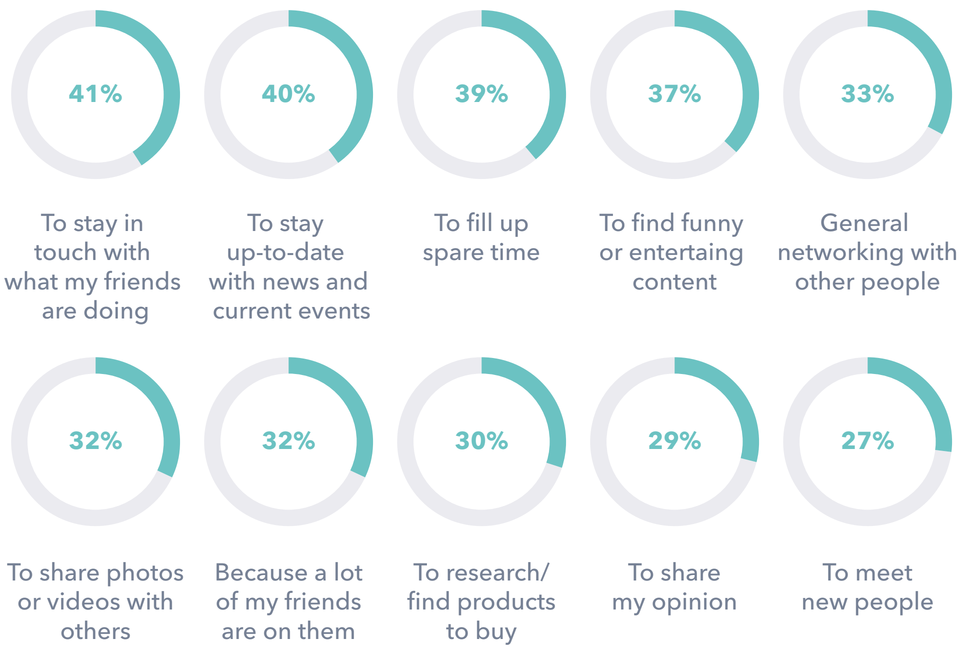
How long are digital consumers devoting each day to social media, and how do their networking activities spread between different platforms?

Key Headlines

- **98% of digital consumers are social media users,** showing how in virtually all demographics and markets, being an internet user means being a social media user.
- **Daily time spent on social media is rising, now standing at around 2 hours and 15 minutes per day.** This means 1 in every 3 minutes online is spent on social media.
- **16-24s devote the longest periods of their days to social media,** with Latin America and the Middle East and Africa having the highest daily times from a regional perspective.
- **Digital consumers average c.8 social media accounts,** but multi-networking seems to be approaching its peak.

MOTIVATIONS FOR USING SOCIAL MEDIA

% who say the following are among their main reasons for using social media



TOP MOTIVATIONS AMONG 16-24S

% of 16-24s who say the following are the main reasons they use social media

To fill up spare time	**47%**
To find funny or entertaining content	**45%**
To stay in touch with what my friends are doing	**43%**
To stay up-to-date with news and current events	**41%**
To share photos or videos with others	**36%**

Question: What are your main reasons for using social networking services?
Source: GlobalWebIndex Q4 2017
Base: 80,267 Internet Users aged 16-64

The Social Entertainment Industry

How is the rise of video and live streaming positioning social platforms as entertainment hubs for music, sports, news and TV?

Key Headlines

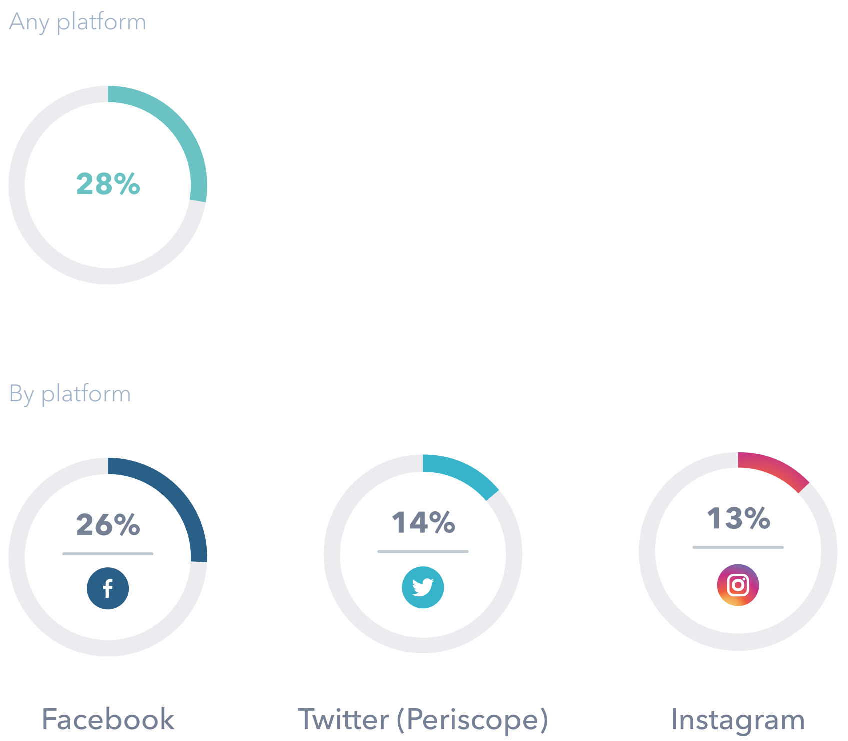
- **54% of internet users outside China have watched a video on Facebook, Twitter, Snapchat or Instagram in the past month.** As video continues to take off, clear opportunities will arise for platforms to move into the world of TV

- **Live video has quickly become an essential asset in the arsenal of social media companies.** This represents one of the most important trends in which entertainment and marketing overlap the most.

- **Social media is increasingly becoming a hub for music.** Our data also shows that users of Facebook, Snapchat, Twitter and Instagram are all spending longer on music streaming services per day on average, and this engagement climbs significantly among their younger users.

LIVE-STREAM VIEWING ON SOCIAL

% on each platform who have viewed a live-stream in the past month



Questions: Which of these things have you done within the last month on Facebook / Instagram / Snapchat / Twitter?
Source: GlobalWebIndex Q4 2017
Base: Users of each platform aged 16-64

Notes on Methodology

INTRODUCTION

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 populations 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**.

Notes on Methodology

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.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2018. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

INTERNET PENETRATION RATES (GLOBALWEBINDEX'S FORECASTS FOR 2018 BASED ON 2016 ITU DATA)

Table below refers to the total population in each market

Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.3%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%

INTERNET PENETRATION RATES: GWI VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Notes on Methodology

SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2017 wave of research across 42 countries, which had a global sample size of 97,317 (with 80,267 surveys completed on PC/laptop/tablet and 17,050 surveys completed on mobile). The sample by market breaks down as follows:

Market	GWI Sample
Argentina	1,590
Australia	1,261
Austria	1,285
Belgium	1,260
Brazil	2,250
Canada	2,440
China	13,616
Egypt	1,290
France	2,260
Germany	2,262
Ghana	750
Hong Kong	1,253
India	3,090
Indonesia	1,757

Market	GWI Sample
Ireland	1,316
Italy	2,251
Japan	1,751
Kenya	750
Malaysia	1,513
Mexico	1,560
Morocco	750
Netherlands	1,259
New Zealand	1,266
Nigeria	750
Philippines	1,508
Poland	1,255
Portugal	1,270
Russia	2,309

Market	GWI Sample
Saudi Arabia	1,251
Singapore	1,519
South Africa	1,541
South Korea	1,251
Spain	2,254
Sweden	1,311
Switzerland	1,259
Taiwan	1,254
Thailand	1,618
Turkey	1,750
UAE	1,285
UK	7,815
United States	15,780
Vietnam	1,557

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OUR PLATFORM

The questions and data-points featured in this report are available to explore on our Platform. They can be analyzed by any audience, data 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 sign up for free

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

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
Usages and Attitudes
Price Point
Platform Testing
Concept Testing

CAMPAIGN & AUDIENCE SOLUTIONS
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Campaign Measurement
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Jason Mander

CHIEF RESEARCH OFFICER

E jason@globalwebindex.net

@therealjasonmander

Chase Buckle

SENIOR TRENDS ANALYST

E chase@globalwebindex.net

@Chase_Buckle

www.globalwebindex.com

T + 44 207 731 1614 | **E** hello@globalwebindex.com

A 25 Farringdon Street, London, EC4A 4AB, UK