Social

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

FLAGSHIP REPORT 2019

www.globalwebindex.com

Contents

Introduction

GlobalWebIndex Social Media Flagship provides the most important insights into 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 media?
- 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?

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 platform's website or app via any device.

Key Insights

In Q1 2019, **time spent on social media has decreased or stayed the same compared to 2018 data in 20 out of the 45 markets we survey**. This is likely a result of many internet users having a better awareness of the time they spend looking at screens, and the proliferation of 'digital wellbeing' tools.

The opportunities for social engagement, at all times of the day and in various locations, have **facilitated the evolution of social platforms into entertainment hubs**. It's no longer about "social" activities in the purest sense, but more purposeful activities, particularly those based around content consumption.

The emergence of more image-centric and ephemeral platforms like Snapchat and Instagram, which have both been the fastest growing platforms outside of China that we track, **gave people the opportunity to re-establish their networks, allowing them to pick and choose who they're most comfortable sharing content with**.

In the West, **relatively smaller and more specialized social platforms like Instagram and Pinterest are best positioned to successfully and seamlessly integrate different stages of the purchase journey**. These platforms nurture the areas where social and commerce activities overlap the most, namely the research stage, where video can better bridge the online-offline shopping experience gap.

In 2018, **video calling increased for nearly all demographics, including students as well as professionals**. All age groups are increasing their number of video calls, but **Gen Z** are the ones to watch, as they could define how the trend develops in 2019. Social services like **Houseparty and Squad** point towards **a possible new frontier in social media, where entertainment and communication are more closely interlinked in virtual hangout spaces**.

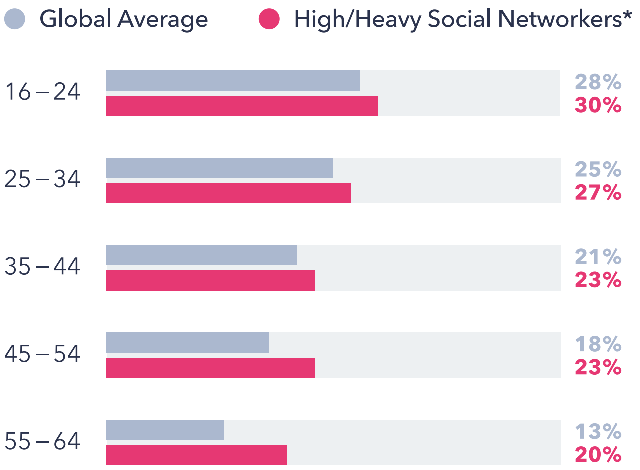
Social

Social Media Engagement

Social Media & Digital Wellbeing

Screen Time Tracking

% who say they have used their mobile to track their screen time or set limits for certain apps



> 6 in 10 global internet users say that they are constantly connected online.

The social media industry has begun to face a reckoning over the past 2-3 years. Namely, over how much time we spend on various platforms, social media's impact on youth, continued indictments and scandals over how content should be moderated, and how much responsibility platforms should take for instances of misinformation circulating the networks.

One important consequence of social media being put under a microscope is **the emergence of digital wellbeing tools as a major industry trend for 2019**, which focuses on helping individuals to understand how they use the tech around them and provide tips and techniques to establish healthy habits.

Google's **Digital Wellbeing** features provide analysis on a user's **screen time** usage. Android users can set app time limits so as not to spend too long in one particular app, whilst Google Pixel phone owners can use the Wind Down feature to reduce the screen's blue light before going to bed. Apple offers similar functions with its **Screen Time** feature in iOS 12, as do Facebook ('Your Time on Facebook') and Instagram ('Your Activity').

Google's research demonstrated that **78 percent of people felt happier about their phone usage since using a digital wellbeing app**. Users reported finding more time to meditate, and stated that they had improved sleep quality. The flipside of screen addiction, ironically, is that technology can enable us to take ownership of our own health.

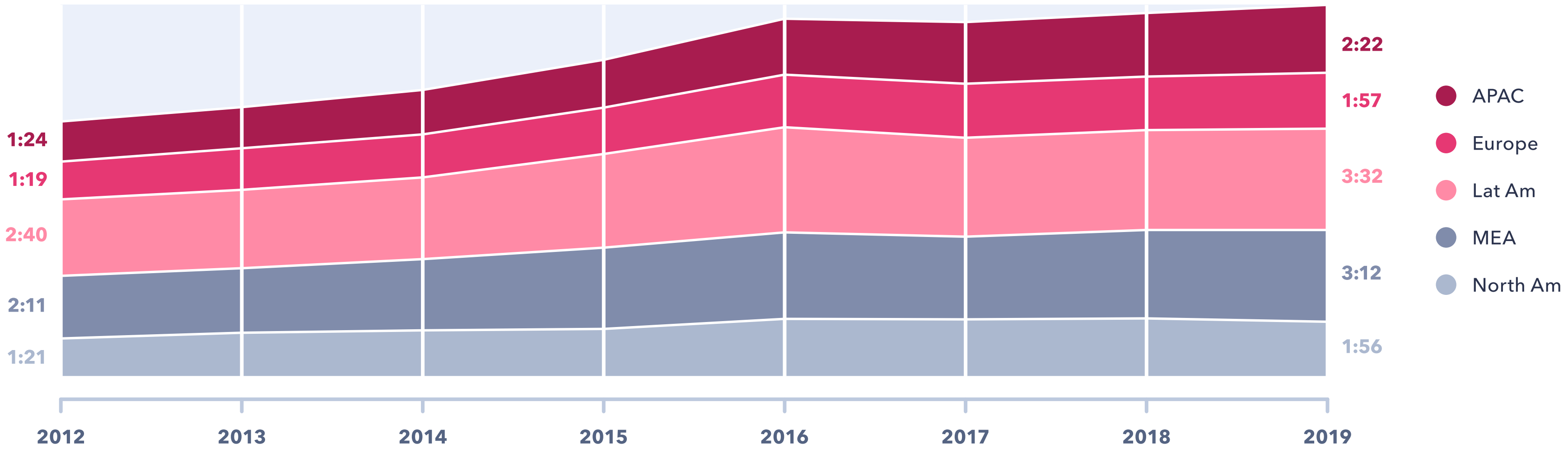
*High/Heavy Social Networkers say they spend at least an hour per day on social media services

Question: Which of these have you done on your mobile in the last month? (Tracked your screen time or set limits for certain apps)
Source: GlobalWebIndex Q1 2019 **Base:** 139,397 Internet Users aged 16-64

Time Spent on Social Media

Daily Time Spent on Social Media

Average h:mm spent engaging with/connected to social networks during a typical day



98% of consumers have used a social media network in the past month; being an internet user means being a social media user

Globally, **digital consumers are now spending an average of 2 hours and 23 minutes per day on social networks and messaging**. A look at the trended data here suggests that we might be approaching saturation in social media consumption.

In Q3 2018, we started to see time spent on social media plateau across a handful of countries – where time spent online has simultaneously either stayed the same or decreased. This is likely a result of many internet users having a better awareness of the time they spend looking at screens, as well as the perceived negative effects associated with social media usage, and wanting a **digital detox** as a result.

This trend has continued. **In Q1 2019, time spent on social media has decreased or stayed the same compared to 2018 data in 20 out of the 45 markets we survey.**

Across the globe, 16-24s are devoting the most time per day to social media – just under three hours, on average. The importance of messaging apps to this demographic is a key reason behind this, as is the centrality of smartphones to their digital lives. Additionally, it is important to note that this **consumption is simultaneous rather than sequential**; 72% of 16-24s say they use social media while they are watching TV.

Question: Roughly how many hours do you spend engaging with/connected to social networks or services during a typical day?
Source: GlobalWebIndex 2012-2019 (avg of all waves conducted in each year)
Base: 1,778,895 Internet Users aged 16-64

Time Spent by Market

Younger groups are the most enthusiastic about social media, and the internet populations of fast-growth markets tend to be younger than most mature markets. This provides clear context for why the topline figures for daily time spent on social media differ so significantly between countries, from a high of 4 hours in the Philippines, to much lower figures of around 1 hour 15 minutes in some European countries.

If we examine the habits of 16-24s in isolation, we see many mature markets posting high numbers – with this age group in the UK, Romania, Portugal and Ireland spending well over 3 hours on social media daily. **But the highest engagement in Europe is in Russia,** with 16-24s here typically spending over 4 hours per day on social media. Russia's own unique ecosystem of social platforms could be key here, in particular Vkontakte (VK) which, through its TV, music and payment services, provides a greater infiltration into the everyday life of its users similar to that of WeChat in China. Despite Western platforms having an official presence in Russia, home-grown networks VK and Odnoklassniki, boast significantly higher figures than Facebook and Instagram both for membership and monthly visitation.

But the effects aren't down to age alone. **Even among 16-24s, certain markets primarily in Asia and Latin America stand out for their occupation with social media.** Particularly notable are Argentina (4:17), the Philippines (4:16) and Colombia (4:12).

> LatAm markets are in the top eight most engaged countries on social media.

Time Spent by Market

Daily Time Spent on Social Media

Average h:mm spent engaging with/connected to social networks during a typical day

	2012	2013	2014	2015	2016	2017	2018	2019
Philippines	2:49	3:06	3:25	3:41	4:07	4:00	4:08	**4:01**
Brazil	2:41	2:40	2:50	3:18	3:45	3:40	3:39	**3:45**
Colombia	-	-	-	-	-	-	3:34	**3:36**
Nigeria	-	-	-	-	-	3:03	3:26	**3:36**
Argentina	2:42	2:49	2:50	3:13	3:31	3:12	3:17	**3:27**
Indonesia	2:12	2:21	2:26	2:50	3:02	3:26	3:23	**3:15**
UAE	2:21	2:29	2:48	3:01	3:24	2:56	3:00	**3:11**
Mexico	2:35	2:50	2:53	3:14	3:33	3:11	3:14	**3:10**
South Africa	1:58	2:07	2:16	2:42	2:50	2:47	2:58	**3:10**
Egypt	-	-	-	-	3:17	3:06	3:05	**3:06**
Kenya	-	-	-	-	-	2:50	2:59	**3:06**
Saudi Arabia	2:23	2:18	2:35	2:55	2:56	2:38	2:52	**3:06**
Turkey	1:56	2:17	2:25	2:34	2:57	2:49	2:52	**3:05**
Ghana	-	-	-	-	-	2:59	3:09	**3:03**
Malaysia	2:39	2:53	2:48	2:59	3:18	3:06	3:03	**3:01**
Thailand	1:59	2:34	2:41	2:49	2:46	3:06	3:14	**2:51**
Romania	-	-	-	-	-	-	2:34	**2:28**
Russia	1:40	1:46	1:49	1:52	2:17	2:20	2:21	**2:28**
India	1:44	1:57	2:03	2:15	2:30	2:25	2:28	**2:25**
Morocco	-	-	-	-	-	2:22	2:34	**2:23**
Vietnam	1:47	1:57	2:07	2:16	2:34	2:36	2:33	**2:23**
China	1:19	1:17	1:24	1:27	1:45	1:58	2:00	**2:19**
Portugal	-	-	-	1:54	2:13	2:13	2:12	**2:18**

	2012	2013	2014	2015	2016	2017	2018	2019
Singapore	1:12	1:29	1:36	1:38	1:58	2:07	2:11	**2:10**
USA	1:22	1:34	1:40	1:43	2:04	2:02	2:05	**1:57**
Hong Kong	1:34	1:26	1:27	1:29	1:39	2:00	1:53	**1:52**
Ireland	-	1:24	1:11	1:22	1:38	1:45	1:55	**1:51**
Sweden	1:13	1:13	1:22	1:33	1:37	1:54	1:49	**1:51**
Taiwan	1:28	1:30	1:41	1:50	2:03	2:06	1:52	**1:51**
UK	1:11	1:14	1:19	1:29	1:42	1:54	1:51	**1:50**
Canada	1:12	1:29	1:29	1:27	1:41	1:48	1:47	**1:49**
Poland	1:02	1:12	1:13	1:17	1:40	1:42	1:45	**1:47**
Italy	1:33	1:49	1:47	1:58	2:02	1:53	1:48	**1:46**
Australia	1:15	1:13	1:11	1:10	1:36	1:39	1:34	**1:43**
New Zealand	-	-	-	-	1:43	1:49	1:42	**1:43**
Spain	1:30	1:30	1:26	1:38	1:43	1:38	1:41	**1:43**
Denmark	-	-	-	-	-	-	1:35	**1:33**
France	1:01	1:05	1:11	1:17	1:23	1:24	1:22	**1:28**
Belgium	-	-	-	1:15	1:33	1:31	1:31	**1:24**
South Korea	0:47	0:47	0:58	1:05	1:04	1:11	1:11	**1:20**
Netherlands	0:56	0:59	1:02	1:10	1:16	1:24	1:17	**1:18**
Switzerland	-	-	-	-	-	1:18	1:19	**1:18**
Austria	-	-	-	-	-	1:16	1:15	**1:17**
Germany	0:58	1:04	1:04	1:08	1:07	1:13	1:08	**1:15**
Japan	0:23	0:18	0:17	0:20	0:33	0:46	0:40	**0:45**

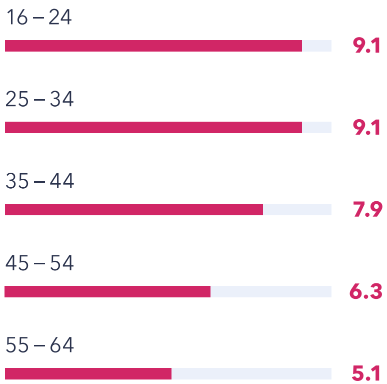
Question: Roughly how many hours do you spend engaging with/connected to social networks or services during a typical day?
Source: GlobalWebIndex 2012-2019 (avg conducted across each wave of research)
Base: 1,778,895 Internet Users aged 16-64

Social Saturation

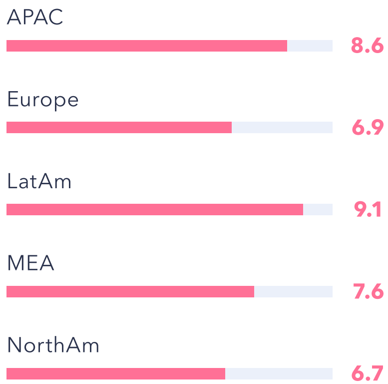
Multi-Networking

Average number of social media accounts held by internet users

BY AGE



BY REGION



8.1 GLOBAL AVERAGE NUMBER OF SOCIAL MEDIA ACCOUNTS

6.4 GLOBAL AVERAGE NUMBER OF **MOBILE ONLY** SOCIAL MEDIA ACCOUNTS

OVER TIME	2013	2014	2015	2016	2017	2018	2019
Global Average	**4.3**	**4.8**	**6.3**	**7.6**	**8.0**	**8.6**	**8.5**
Gen Z	4.4	4.8	6.9	8.0	9.0	9.7	**9.0**
Millennials	5.1	5.7	7.4	8.9	9.3	9.7	**9.1**
Gen X	4.0	4.3	5.6	6.8	6.9	7.1	**7.0**
Baby Boomers	2.6	2.8	3.5	4.3	5.0	5.1	**5.0**

Social media users are comfortable maintaining a presence across a number of platforms; while the average internet user had about 4 social media accounts in 2013, the figure has now risen to 8.1. **This multi-networking is a response to the widening choice of platforms, but it is also being caused by a degree of specialization**, where some users are turning to particular platforms to carry out certain types of networking behaviors, like Twitch or Pinterest.

Just as time spent on social media is beginning to plateau, online consumers seem to be close to maxing out the number of platforms they have an account with. 2017 marked the first year that we observed no appreciable growth in the average number of social media accounts per internet user, and this trend has continued into 2019.

There are many factors that have influenced this plateauing, including **the growth in internet usage among older consumers who tend to be less likely to multi-network**, and the stagnation of user growth on certain key platforms. However, the most important trend to understand regarding this peak in multi-networking **is the rise of the mobile-only internet user who focus their social engagement on a select group of platforms**. This can especially be found in African markets, where data packages tend to be restricted, or where data plans tend to subsidize data-use across certain platforms.

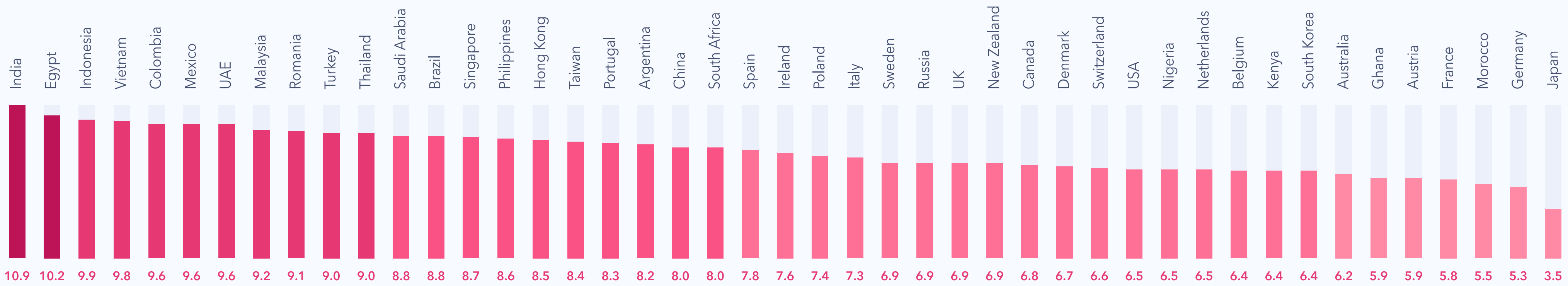
While social media use has generally plateaued among many of the advanced economies surveyed, **emerging nations seem to be much heavier social media users**. Indonesia, India and Egypt mark themselves out as the keenest on having a diverse social media portfolio.

Question: On which of the following services do you have an account? **Source:** GlobalWebIndex Q4 2018 and Q1 2019 **Base:** 139,397 Internet Users aged 16-64

Question: On which of the following services do you have an account? **Source:** GlobalWebIndex 2013-2019 **Base:** 1,717,699 internet users aged 16-64

Multi-Networking: Market Insights

AVERAGE NUMBER OF ACCOUNTS IN Q1 2019



	Used social in last month	PC/laptop	Mobile
India	99%	78%	91%
Egypt	100%	74%	94%
Indonesia	100%	72%	98%
Vietnam	100%	84%	95%
Colombia	100%	84%	95%
Mexico	100%	81%	96%
UAE	100%	72%	94%
Malaysia	99%	69%	97%
Romania	100%	92%	90%
Turkey	99%	71%	95%
Thailand	100%	64%	98%
Saudi Arabia	100%	62%	97%
Brazil	100%	80%	96%
Singapore	99%	78%	93%
Philippines	100%	80%	97%

	Used social in last month	PC/laptop	Mobile
Hong Kong	100%	76%	94%
Taiwan	100%	80%	94%
Portugal	100%	86%	89%
Argentina	100%	82%	93%
China	99%	65%	93%
South Africa	100%	79%	94%
Spain	99%	81%	89%
Ireland	98%	75%	88%
Poland	99%	87%	87%
Italy	98%	77%	89%
Sweden	98%	77%	85%
Russia	99%	89%	84%
UK	96%	72%	80%
New Zealand	99%	83%	85%
Canada	98%	77%	78%

	Used social in last month	PC/laptop	Mobile
Denmark	98%	74%	81%
Switzerland	98%	78%	83%
USA	97%	74%	80%
Nigeria	-	-	-
Netherlands	97%	72%	83%
Belgium	97%	79%	79%
Kenya	-	-	-
South Korea	97%	64%	89%
Australia	96%	76%	80%
Ghana	-	-	-
Austria	98%	79%	85%
France	96%	77%	75%
Morocco	-	-	-
Germany	93%	72%	75%
Japan	89%	62%	68%

The Rise of Dark Social

The Reach of Dark Social

% who say they typically share information or content with peers on the following channels

38% in the UK and U.S. feel most comfortable sharing content on private messaging apps.

Coined in 2012, **"Dark Social" refers to nearly untraceable web traffic that comes from internet users sharing content directly and privately with each other, instead of posting or sharing it publicly.** It often takes place on private messaging apps and email, and it means that brands may be overlooking a huge portion of social sharing about their products.

Internet users in the U.S. and UK are now more likely to be sharing information or content with their peers on private messaging apps compared to public social networks and even word-of-mouth.

Dark social has quickly emerged as a major marketing channel that brands can't ignore. It's been well over a decade since Facebook took the mantle from Myspace as the top social platform on a global level. In that time, **how and why people use social media has drastically changed**. The friend networks which may have been accrued on Facebook in that time will typically be very large and at times very impersonal, and people may not be comfortable with sharing their posts or updates which such a vast group of people.

The emergence of more image-centric and ephemeral platforms like Snapchat and Instagram, which have both been the fastest growing platforms outside of China that we track, **gave people the opportunity to re-establish their networks, allowing them to pick and choose who they're most comfortable sharing content with**. These platforms have arguably given rise to a much **more ostentatious undercurrent in social media, embodied in influencer culture**. Against this undercurrent, private spaces, especially those fostered within private messaging apps like WhatsApp and Messenger, have flourished, giving people much more of a safe space reserved for close peers, family, or those who they share genuine connections and trust with.

While private spaces absorbed a larger share of the "social" aspect of social media, public platforms have expanded on the "media" offering. More and more activities, from sports viewing to news consumption have found a home on users' newsfeeds as a result.

Interacting directly with younger consumers in these spaces is one approach to deal with the challenge of dark social. **Creating more relevant, shareable content that encourages sharing with friends and family in these private environments using "sharing buttons" is another.** What's essential in both these cases is that respect for users' privacy is an undertone in any marketing tactic or campaign.

Question: How do you tend to share information or content with friends/family?
Source: GlobalWebIndex February 2019
Base: 3,139 Internet Users aged 16-64 in the UK and U.S.

Social Media Motivations

As we've just covered, the role that social media plays in the lives of its users has evolved. **Digital consumers are now more likely to say they use social to follow the news (40%) than they are to identify it as a platform for keeping in touch with friends (39%).** Entertainment also now plays a key role in motivating digital consumers to engage with social media, **ranking as the third most important reason for internet users (38%) but showing the highest growth.**

The opportunities for social engagement, at all times of the day and in various locations, have **facilitated the evolution of social platforms into entertainment hubs**. It's no longer about "social" activities in the purest sense, but more purposeful activities, particularly those based around content consumption. This helps to explain why motivations like **news consumption, finding entertaining content, researching products, and watching sports have seen increases in the past few years**.

16-24s are the most likely audience to list 'finding funny or entertaining content' (47%) as a main reason they use social media, followed by using social media to fill up spare time (46%) and to stay in touch with what their friends are doing (43%). Keeping in touch with friends is consistently listed as a reason for using social media across all age groups, but **it is waning as a motivator for 16-24 year olds**. With Generation Z and millennials showing less interest in other people's updates – and **the growing desire to extricate themselves from the social aspects of social media** – **social media as an entertainment hub will likely become the dominant form of engagement across the most widely used open platforms**.

Motivations for Using Social Media

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

40% To stay up-to-date with news and current events

39% To stay in touch with what my friends are doing

38% To find funny or entertaining content

37% To fill up spare time

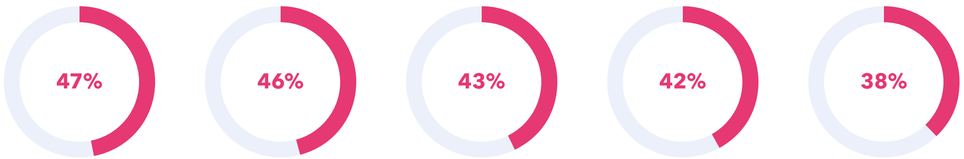
33% General networking with other people

33% To share photos or videos with others

31% To research/find products to buy

30% Because a lot of my friends are on them

TOP MOTIVATIONS AMONG 16-24S



To find funny or entertaining content | To fill up spare time | To stay in touch with what my friends are doing | To stay up-to-date with news and current events | To share photos or videos with others

1.33 To follow celebrities/ celebrity news

1.31 To make sure I don't miss out on anything

1.26 To fill up spare time

Question: What are your main reasons for using social media? **Source:** GlobalWebIndex Q1 2019 **Base:** 139,397 Internet Users aged 16-64

• TREND IN ACTION •

Facebook to launch 'Libra' cryptocurrency in 2020

7% of those who have visited Facebook in the last month have a cryptocurrency investment (IDX 1.16)

Facebook is planning to launch its own cryptocurrency in 2020, allowing users to make digital payments in a dozen countries. The currency, dubbed Libra, would enable Facebook's users to change dollars and other international currencies into its digital coins which can then be used to buy things on the internet and in shops/other outlets, or transfer money without needing a bank account. Zuckerberg has reportedly met with the governer of the Bank of England, U.S. Treasury officials and money transfer firms such as Western Union, to develop cheap, safe ways for people to send and receive money. In order to try and stabilize the digital currency, the company is looking to peg its value to a basket of established currencies like the U.S. dollar, the euro and the Japanese yen. It's also looking at paying users fractions of a coin for activities such as viewing ads or interacting with content related to online shopping, similar to retailers' loyalty schemes.

Social

Social Media Behaviors

• TREND IN ACTION •

Adverts Coming to WhatsApp Next Year

42% of WhatsApp users agree they tend to buy brands they see advertised, but 26% say they use an ad-blocker because too many ads are annoying or irrelevant

Facebook has confirmed that WhatsApp will be introducing adverts to its messaging app next year. Facebook acquired the messaging service in 2014 for $19 billion, and revealed the update at its annual Facebook Marketing Summit in the Netherlands. The ads will reportedly take up the entire screen of a smartphone and allow users to find out more information about the advertiser by swiping up, although not all users will be happy with the new feature. When WhatsApp first launched, its creators promised it would not sell its users' data or put ads on the platform, instead charging a yearly fee of 99 cents in order to cover the costs of hosting millions of chats. But now, with 60% of internet users outside China using the app on a monthly basis, it is now looking to generate extra revenue.

The Social Purchase Journey

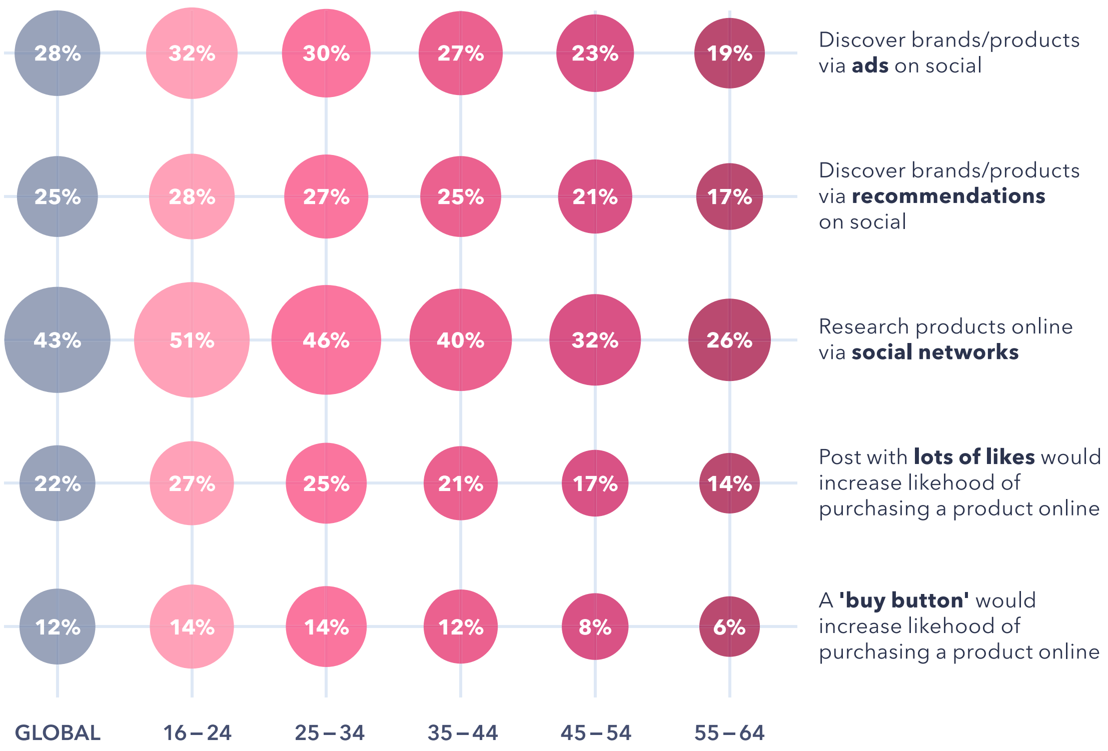
Enabling consumers to finalize a purchase while remaining within social apps has been a goal for social platforms for some time now. **Social commerce is seen to have the potential to be a major revenue generator and an important way to diversify revenue streams beyond advertising**. Across Asia, networks like **WeChat and Line have successfully facilitated commerce via their platforms**, allowing consumers to carry out a range of commerce activities from booking taxis to paying for restaurant bills or items in-store.

But social commerce has been a tough sell in many Western markets. Online consumer habits here can be difficult to change, especially when it comes to the potentially sensitive information involved in financial transactions. **Social media can play a big role in the purchase journey right up to the point of purchase**, but the appetite to complete a final purchase within the platform remains low. Most will move to retail sites. **These benefits must be intrinsically social or deeply embedded with payment systems, and must be grounded in consumer-engagement strategies**, in order for social commerce to achieve the roaring success seen in APAC.

The prospect of using "buy" buttons on social media in the U.S. has not quite gained traction. The growing role of social networks as a way of researching products does, however, provide social video with a strong value-proposition in furthering the social commerce agenda in this market. In the U.S., **relatively smaller and more specialized social platforms like Instagram and Pinterest are best positioned to successfully and seamlessly integrate different stages of the purchase journey**. These platforms nurture the areas where social and commerce activities overlap the most, namely the research stage, where video can better bridge the online-offline shopping experience gap. The disconnect between research and purchase could also be helped by **more nuanced and sophisticated personalization tools**, as well as **more advanced chatbots and machine learning.**

The Social Path to Purchase

% who say they do the following



Question: How do you typically find out about new brands and products? // 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 these features would most increase your likelihood of buying a product?
Source: GlobalWebIndex Q4 2018 and Q1 2019
Base: 278,359 Internet Users aged 16-64

Social

Social Entertainment

Types of People Followed on Social

Social Following

% who say they "follow" these types of social media accounts

	Global average	16-24s
People you know in real life	51%	55%
Brands you like	38%	44%
Singers, musicians or bands	34%	45%
Actors	33%	46%
News/media organizations	30%	29%
Contacts relevant to your work	28%	26%
Brands you are thinking of buying something from	27%	30%
Comedians	26%	35%
Sports stars	24%	30%
Bloggers	22%	31%
Entrepreneurs/business people	20%	23%
Vloggers	19%	29%
Charities/good causes	17%	18%
TV Presenters	17%	20%
Politicians	16%	16%
Journalists	14%	14%

More than a third of internet users say they follow their favorite brands on social media, while 27% follow brands which they are thinking of making a purchase from.

3 in 10 follow news or media organizations via social media and, significantly, the likelihood of doing this doesn't vary appreciably by age except for a slight peak among 25-34s. The opportunity for brand ambassadors to reach vast audiences via social meeting is apparent – 33% say they like to follow actors and 1 in 4 who follow sports stars.

Content networkers – those who use social media to find entertaining content, watch sports or follow vloggers – are roughly 1.35x more likely than the average internet user to visit a brand's social network, like/follow a brand on a social network, and click on sponsored posts. This reflects the shift we've seen generally in the social media landscape, whereby **news, entertainment, shopping and content have taken up a greater role compared to classic social networking**. Various instances of brands increasing their efforts for **hard-hitting and easily shareable quality video content** confirm this trend.

The accounts that **16-24s follow confirm the wide reach that influencers can have**. Almost half of 16-24s (46%) follow actors on social media, placing these accounts ahead of branded ones. And with other celebrities occupying the top five spots, traditional celebrity endorsements should not necessarily be abandoned totally for influencer marketing. What matters is relevance.

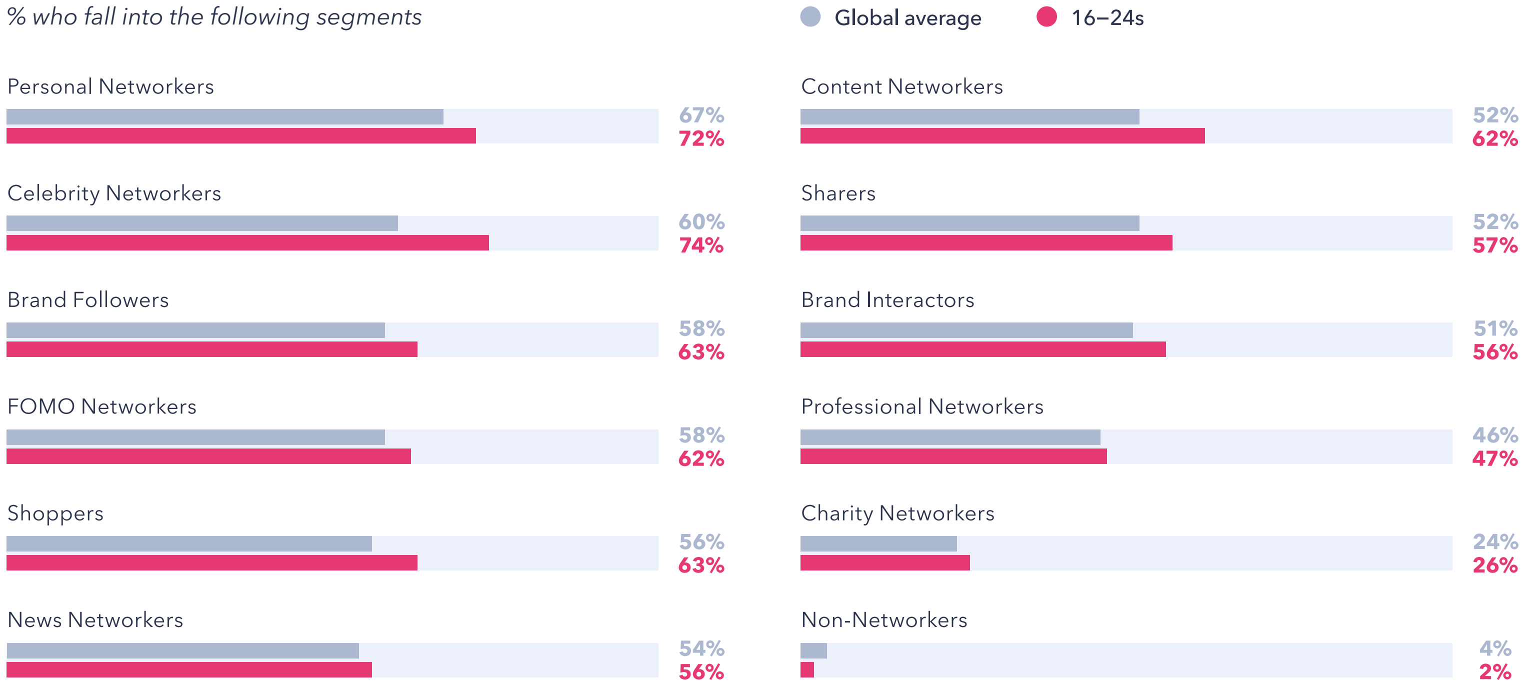
Even among 16-24s (the most avid celebrity followers), just 19% say they find new brands via celebrity or influencer endorsements, clearly showing that **this group aren't all beholden to influencers and can be reached with other 'traditional' means, too**.

Question: Who do you follow on social media?
Source: GlobalWebIndex Q4 2018 and Q1 2019
Base: 278,359 Internet Users aged 16-64

Social Usage Personas

Social Media Segmentation

% who fall into the following segments



In our social media usage segmentation, individuals are classified into segments based on how they engage with social media. The largest share of social users are qualified as *personal* and *celebrity networkers*.

58% of social media users qualify as *brand followers*. Clearly, **many social networkers are happy to be exposed to branded content on their newsfeeds**, highlighting how today it is vital for brands to stand-out with an engaging presence across social platforms. Consumers' relationships with brands on these platforms are not always passive either: just over half (51%) can be classed as *brand interactors*, which includes those who are using social platforms to get in touch with brands and those who share posts from brands. The proportion of those following brands they like or brands they interact with has stayed consistent over the last 2-3 years. The result of a heavy brand presence on our newsfeeds has been the humanization of brands, helping to give rise to the culture of accountability under social media, as we outline in our **Sustainable Packaging report**.

To find how each of these segments are defined, click **here**.

Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q4 2018 and Q1 2019
Base: 278,359 Internet Users aged 16-64

Social Media Behaviors: Market Insights

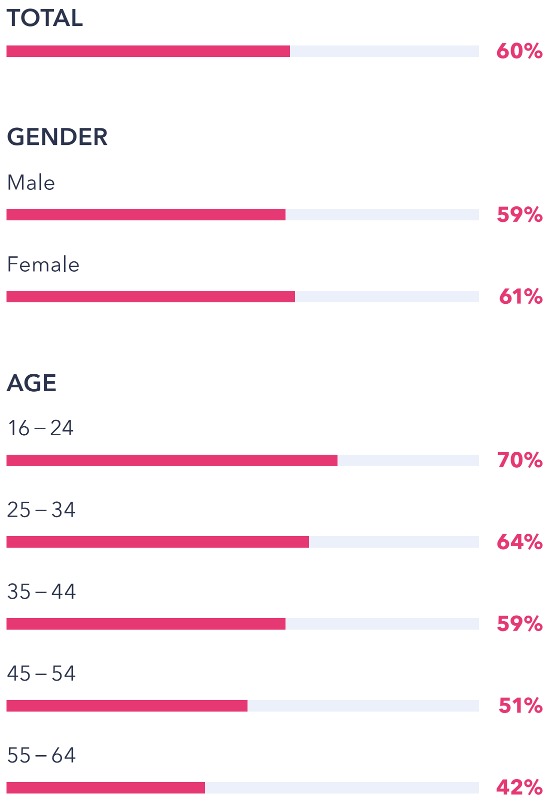
	USING SOCIAL TO STAY UP-TO-DATE WITH NEWS AND CURRENT EVENTS	FOLLOWING BRANDS THEY LIKE	DISCOVERING BRANDS THROUGH COMMENTS ON SOCIAL MEDIA	RESEARCHING PRODUCTS/ BRANDS USING SOCIAL NETWORKS	MOTIVATING PURCHASE THROUGH LOTS OF "LIKES" ON SOCIAL MEDIA	MOTIVATING PURCHASE THROUGH "BUY" BUTTON ON A SOCIAL NETWORK
Argentina	49%	45%	38%	61%	25%	10%
Australia	34%	36%	22%	31%	14%	5%
Austria	38%	30%	18%	32%	11%	4%
Belgium	38%	30%	17%	29%	9%	4%
Brazil	55%	51%	36%	57%	20%	10%
Canada	39%	35%	22%	32%	15%	6%
China	35%	37%	24%	35%	27%	17%
Colombia	56%	55%	38%	65%	28%	12%
Denmark	40%	26%	19%	32%	9%	5%
Egypt	49%	40%	32%	63%	32%	19%
France	31%	25%	13%	26%	11%	4%
Germany	32%	26%	14%	24%	10%	4%
Ghana*	–	–	22%	74%	–	–
Hong Kong	40%	46%	23%	40%	23%	10%
India	38%	38%	23%	45%	22%	16%
Indonesia	48%	48%	35%	64%	39%	13%
Ireland	45%	37%	24%	36%	15%	7%
Italy	42%	36%	18%	30%	14%	5%
Japan	30%	24%	13%	23%	9%	4%
Kenya*	–	–	29%	76%	0%	–
Malaysia	61%	51%	40%	64%	32%	12%
Mexico	49%	53%	36%	61%	24%	11%
Morocco*	–	–	17%	63%	–	–
Netherlands	38%	30%	16%	25%	8%	3%
New Zealand	40%	38%	26%	36%	15%	7%
Nigeria*	–	–	26%	74%	–	–
Philippines	65%	58%	39%	67%	36%	15%
Poland	48%	45%	22%	45%	20%	8%
Portugal	53%	48%	29%	47%	22%	6%
Romania	49%	42%	29%	47%	16%	7%
Russia	45%	22%	21%	43%	13%	6%
Saudi Arabia	49%	43%	23%	54%	28%	15%
Singapore	51%	42%	26%	37%	22%	8%
South Africa	56%	48%	31%	55%	22%	11%
South Korea	26%	33%	18%	29%	13%	6%
Spain	49%	40%	24%	39%	19%	6%
Sweden	35%	32%	25%	34%	15%	5%
Switzerland	33%	26%	16%	28%	9%	5%
Taiwan	40%	42%	29%	40%	20%	9%
Thailand	62%	52%	28%	53%	33%	18%
Turkey	59%	50%	36%	58%	28%	14%
UAE	46%	40%	25%	51%	23%	12%
UK	35%	33%	20%	27%	14%	6%
USA	33%	34%	19%	28%	14%	6%
Vietnam	44%	37%	32%	68%	25%	14%

** Please note these are mobile markets, where respondents see a shortened version of the GlobalWebIndex survey. As such, some questions in this chart are not asked in these markets.*

Social Video

Social Video Engagement

% of internet users outside of China who are social video viewers



This report defines Social Video Viewers as internet users who have done any of the following:

• Watched a video on Facebook, • Watched something on Facebook Live, • Watched a video clip on Instagram • Viewed a Live Story on Snapchat, • Viewed a User Story on Snapchat, • Watched a video on Twitter

60% of internet users outside China have watched a video on Facebook, Twitter, Snapchat or Instagram in the past month. As more and more become acclimatized to consuming video on social networks, and as online TV takes off more generally, clear opportunities will arise for Facebook and other platforms to move aggressively into the world of TV.

Live video has quickly become an essential asset in the arsenal of social media companies. Not only does this open up the possibility of user-generated content, but it also resembles one of the most important trends in which entertainment and marketing overlap the most. For brands, live video allows them to engage with consumers in a two-way interaction, with a greater sense of trust, transparency and immediacy.

Whenever mobile video is discussed – particularly for younger age groups – it's almost always in the context of **entertainment**. Watching videos on mobile rose sharply last year, but there's another type of video on the rise. Video calling is often talked about from a business perspective, like using software to keep in touch with remote colleagues. But in 2018, **video calling increased for nearly all demographics, including students as well as professionals**. All age groups are increasing their number of video calls, but **Gen Z** are the ones to watch, as they could define how the trend develops in 2019.

Social services like **Houseparty and Squad** revolve around video calling, allowing friends to hang out when they're not physically close. They point towards **a possible new frontier in social media, where entertainment and communication are more closely interlinked in virtual hangout spaces**, especially given that Epic Games – owner of Fortnite – have **acquired** Houseparty this month. With a **recent survey** finding that half of teens say playing Fortnite helps them keep up with their friends and helps them learn teamwork, and 40% say they have improved their communication skills, the idea that Fortnite could become a new type of social network is one to keep an eye on.

Question: Which of these have you done in the last month on Facebook/Instagram/Snapchat/Twitter? **Source:** GlobalWebIndex Q4 2018 and Q1 2019 **Base:** 247,879 Internet Users aged 16-64 (excl. China)

• TREND IN ACTION •

5G is here

37% of consumers in the U.S. and UK say they will switch to 5G as soon as it's available

5G connectivity is one of the most hotly anticipated developments in consumer technology, with the hope that it promises to revolutionize not only smartphone capabilities, but also the capabilities of any other connected device, be that a watch, a car or a household appliance. 5G promises connection speeds up to 20x faster than 4G, enhancing the quality, speed and predictability of mobile entertainment, as well as opening up opportunities for emerging branches of entertainment such as streaming games online on mobile. In theory, 5G will be able to simultaneously support **more than a million devices per sq km**, a big jump over the 60,000-odd devices that 4G maxes out at. In the next few years, we might expect 'network slicing' to become a new buzz word, which will allow operators to carve up their network into a variety of 'virtual' slices, each of which will be isolated from the others and can be adjusted to guarantee different download speeds, latencies and bandwidth.

Hyperfast connectivity could provide a boost in the capabilities of immersive video advertising on social newsfeeds. With anything from location-based tools, AR filters and 4k videos moving to the core of social ad offerings, social media companies will be hoping to grab a **bigger slice of digital adspend** in 5G-enabled markets.

Social Sport

Looking to watch or follow sports events as a main motivation for going on social media has seen a 47% increase since Q4 2016.

And sports leagues are now turning to more digital offerings to lure in younger fans, amidst concerns that TV audience numbers for sporting events are falling. While TV is not dead, particularly for live sport, the fact that the Super Bowl audience shrank this year and the Premier League's rights values were down has prompted the sports industry to broaden its horizons.

How social media motivations have changed over time

% who say the following are main reasons for going on social media

	2016	2019	
To watch/follow sports events	15%	22%	+47%
To promote/support charitable causes	10%	14%	+35%
To find funny or entertaining content	31%	38%	+24%
To research/find products to buy	26%	31%	+19%
To fill up spare time	33%	37%	+13%
To stay up-to-date with news/current events	36%	40%	+12%
To meet new people	28%	26%	−9%
General networking with other people	37%	33%	−11%
Because a lot of my friends are on them	35%	30%	−16%
To share my opinion	38%	29%	−24%

> In Q1 2019, going to social media for sports content is now cited by 22% globally.

Sports fans are craving more tailored, accessible content. The challenge for sports broadcasters and sponsors now is to offer an immersive digital experience as well as a compelling watch on TV, as they look to maximize audience reach and monetization. One potential route for a more engaging online experience is live video, allowing brands to connect with consumers in new and exciting ways in the realms of entertainment. The **sports industry** is already progressing towards digital and social media and there's still plenty of room for growth. Globally, 22% of internet users say that following sports events is one of their main reasons for using social networks, climbing to 39% among live social video viewers.

Peter Hutton, Director of Global Live Sports Partnerships and Programming at Facebook, appeared at last October's Leaders Sport Business Summit to **discuss** what the sports industry can leverage from the platform going forward. First, the sports rights holders can experiment with new forms of production as Facebook plans to utilize its Oculus Rift VR platform to **enhance and redefine the spectator experience** by enabling fans to feel like "they are in the crowd at the game". The recent **unveiling** of the Rift S, a higher resolution VR headset, signals that developments in this space continue.

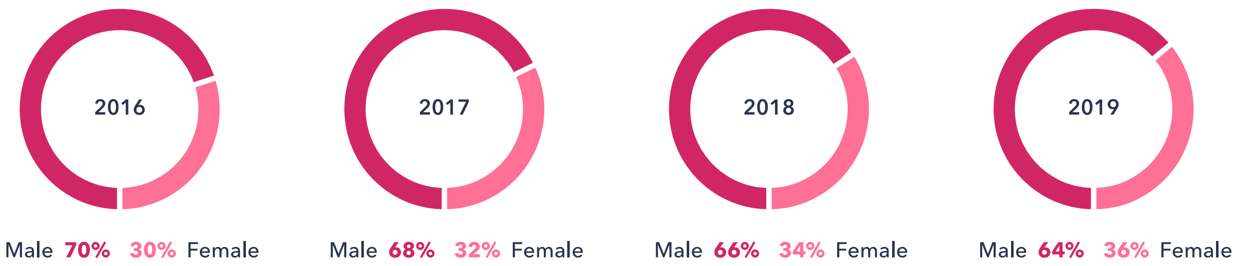
Second, social media provides new avenues to keep fans engaged by building a community, which will ultimately be followed by monetization. As audiences become accustomed to platforms like Netflix and Amazon Video, **long-form viewing on social media and other online channels has increased, contributing to an enriched live sports viewing experience**.

Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q4 2016 and Q1 2019
Base: 57,522 (Q4 2016) and 139,397 (Q1 2019) internet users aged 16-64

Social Sport

The gender gap in using social for sport

The male/female ratio in those saying one of the main reasons for using social media is to watch/follow sports events



Last year, the MLB signed an **exclusive broadcast agreement** with Facebook to produce 26 live games online for $30 million. The initiative was a success, with games receiving 123 million views on Facebook, leading MLB to pursue a **similar agreement** for the 2019 season. What's more, Facebook signed a **deal** with La Liga to live stream games in India for free over the next three seasons. This partnership has helped the club to expand its reach and visibility, reaching a new audience in a country of 1.3 billion people. It's clear that sports live streaming provides new revenue streams to both social networks, as well as sports leagues and sponsors.

YouTube is also a key platform in this space. UK pay-TV giant BT Sport **streamed the UEFA Champions League final** on YouTube for a fourth straight season, in the first all-English final since 2008. Three in ten YouTubers say they've watched a sports video or clip on the platform in the past month. With YouTube boasting the highest membership and visitation rates outside China among those using social media for sports content, it will be looking to be the dominant player in social sports consumption.

Exclusive content or services are important to those going on social media for sports content. **29% of social sport users say they want their favorite brands to improve their knowledge and skills, and they're 50% more likely than the average internet user to say they would promote their favorite brand online for getting insider knowledge about the brand/product.** And exclusive content is particularly important to younger consumers; **16-24 sports fans are 30% more likely than the average sports fan to say exclusive content or services is a purchase driver.**

These sports fans want to see content that they've never seen before, which gives them a new view into their favorite club, or a game they've just watched on TV. They want to be able to get behind-the-scenes access and watch their favorite players in natural, relaxed environments. **This could be why so many sports teams and leagues have joined the TikTok bandwagon.** The NBA, NHL and MLB have all launched league accounts, while the NFLPA reached a **deal** with the platform in January to allow TikTok users to implement 3D augmented reality stickers of its players.

Question: What are your main reasons for using social media? **Source:** GlobalWebIndex 2016-2019 (avg of all waves conducted in each year) **Base:** 7.733 (2016), 48,925 (2017), 68,643 (2018) & 20,875 (2019) social sport watchers aged 16-64

• TREND IN ACTION •

Turning to TikTok

Bayern Munich, which timed its account launch ahead of a rivalry match against Borussia Dortmund, attracted almost 135,000 likes on a behind-the-scenes walkthrough video on gameday at the Allianz Arena. Their content revolves around producing four to five weekly clips, mainly consisting of players performing viral dance moves and routines, and quirky goal celebrations. The NBA, meanwhile, has been on the platform since the **Music.ly** days and built much of its audience through posts of quirky in-game moments. The league has found large success in dropping unseen highlights with accompanying music. While the NBA already utilizes Twitter and Facebook as its home for game-related action and developments, brands are now cognizant of the fact they need to stay nimble on what content fits the right platform.

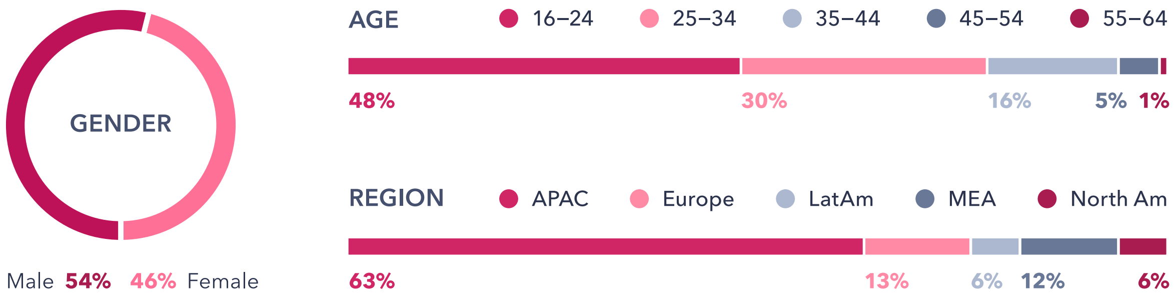
Social Music

TikTok Engagement

% of internet users outside of China who say they have used the TikTok app in the past month

6%

of internet users outside China use the TikTok app



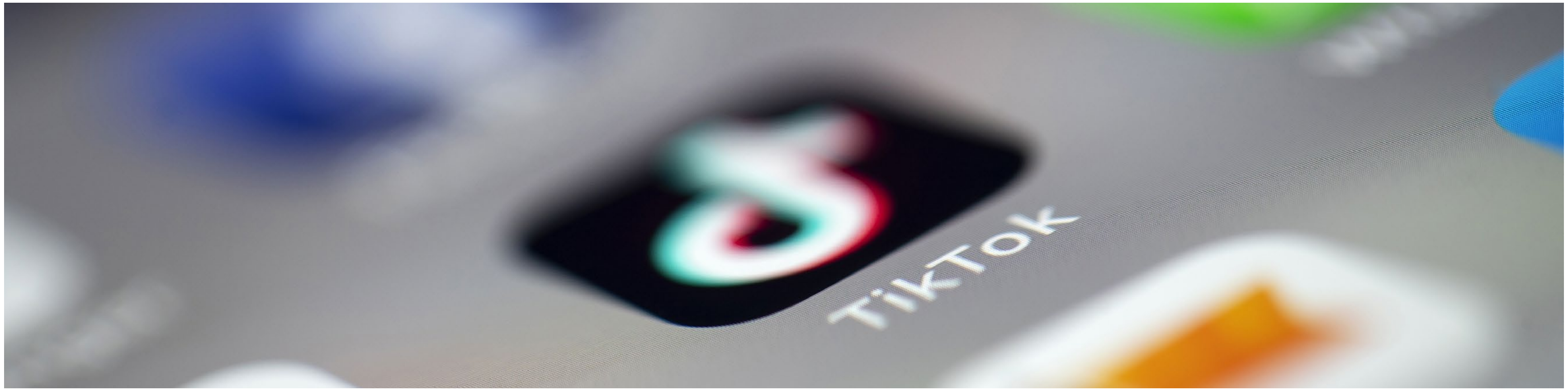
Much of our time using paid music subscriptions is largely spent listening alone, despite music experiences such as concerts, clubs and soundtracks being inherently social activities. Although YouTube and SoundCloud have comments; Spotify has its desktop tracker of what friends are listening to and the ability to make playlists collaborative; and Apple Music has its personalized playlist 'Friends Mix', **there is still a nagging feeling that more could be done**.

So far, it has proved tricky to make social music streaming a reality. Back in June 2018, Facebook users in select countries could add songs to the videos they shared and posted, as well as use the feature 'Lip Sync Live' to, surprisingly, lip sync songs live. Such features were highly anticipated ever since Facebook started licensing deals with **major publishers and record labels** earlier that year. More recently, Facebook has partnered with T-Series Music, Zee Music Company and Yash Raj Films to let its users share music through videos, messages and stories on Facebook and Instagram.

In the West, YouTube and SoundCloud are really the only global streaming services meeting this self-expression need with social features, as well as TikTok, which has become massively popular with younger demographics and recently amassed around **1 billion downloads** around the world. TikTok is particularly good at **helping their creators and influencers grow their high-quality content, as well as unleashing the creativity of ordinary people to help create innovative products on social**. TikTok has already started testing ads in the U.S., with GubHub being among the first to try out the platform's launch screen ad units. TikTok is still experimenting with the best ad options, but they do have Douyin's experience with the different ad approaches to learn from. However, the rapid influx of social media 'gurus' and ads could really kill off the cool factor that TikTok currently has.

Question: In the last month, which apps have you used?
Source: GlobalWebIndex Q4 2018 and Q1 2019
Base: 10,634 TikTok users aged 16-64 (excl. China)

Social Music



TikTok owner ByteDance is **planning to launch a paid music streaming service** to rival the likes of Spotify and Apple Music. The platform will be aimed at users in emerging markets where leading streaming services have not yet scaled, and could launch as soon as fall 2019. And it seems like Snapchat could also be moving into the social music space. Snapchat has **apparently** been in talks with a number of record labels to add more music to its app. This is a sign Snapchat wants to do more to lure fans of TikTok to its service.

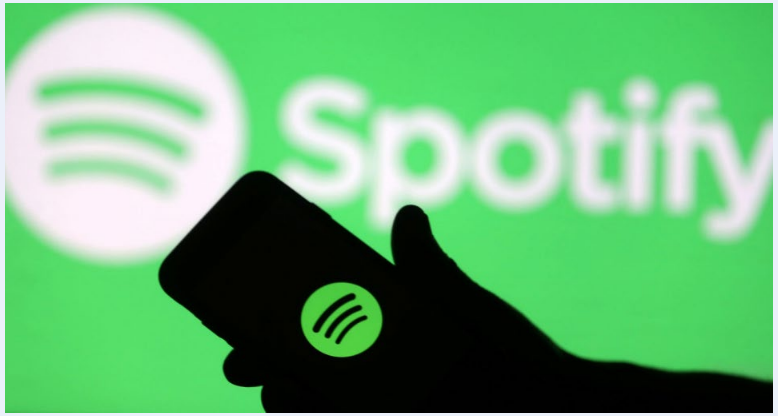
But its Facebook, through its portfolio of social apps, that truly has the most potential to deliver a social music experience that appeals to multiple age groups and use cases. Imagine a scenario where you could have TikTok-like experiences for younger Instagram users, share music and organize music experiences on Messenger, and have sound-tracked stories on Facebook, all with social layers that are directly implemented into the streaming apps themselves. This may already have begun – Instagram has recently released a new feature that lets you display lyrics on your video Story or synced to a soundtrack you've added with the Music sticker.

Facebook could learn from Tencent Music, the company that develops the highly popular music apps QQ Music, Kugou and Kuwo. Combined, these apps have around 650 million active users and **27 million paying subscribers**, and could be poised for even further growth. **The platform is a mash-up of music streaming and social networking, enabling users to listen to music, sing with friends, and buy digital merchandise.** In China, music culture is highly social – Karaoke is very popular, and many of the most popular TV shows are based around signing performances.

Tencent Music is the most dominant music-streaming service based on its user count and music catalog, but it has a lot more to offer than just listening. **The ability for consumers to interact with celebrities and bond with friends over performances has made it a vibrant social network as well.** By piggybacking off of Tencent's popular messaging service WeChat, Tencent Music has helped to create a network effect on the three platforms they own.

• TREND IN ACTION •

Spotify in the Spotlight



Spotify has prototyped an unreleased feature called "Social Listening", allowing multiple people to add songs to a real-time queue by scanning a QR-style code. This has the potential to expand to feature synchronized playback, allowing all listeners to hear the same songs at the same time. The feature is similar to 2011 startup Turntable.fm, which lets users DJ in virtual rooms on their desktop that other people could join to chat, vote on what's played and [cyber]dance, while Facebook briefly offered its own version in 2012 which lets Spotify or Rdio users synchronize music playback. Spotify itself has stripped down its own social features, eliminating the in-app messaging inbox and instead pushing users to share songs over third-party messaging apps. But with music inherently being a social experience, "Social Listening" could help give Spotify a new viral growth channel, with co-listening promoting longer sessions on Spotify and boosting ad plays.

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** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 575,000 internet users aged 16-64 across 46 markets. 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 GlobalWebIndex 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**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2018 and Q1 2019 waves of research across 45 countries, with a global sample of 278,359 respondents.

Argentina	3,116
Australia	8,057
Austria	2,560
Belgium	2,553
Brazil	4,680
Canada	4,539
China	30,480
Colombia	2,787
Denmark	2,522
Egypt	3,533
France	10,130
Germany	10,190
Ghana	1,990
Hong Kong	3,650
India	15,109
Indonesia	3,686
Ireland	2,499
Italy	10,373
Japan	3,604
Kenya	2,024
Malaysia	3,071
Mexico	5,274
Morocco	2,038

Netherlands	2,624
New Zealand	2,558
Nigeria	2,099
Philippines	3,272
Poland	3,651
Portugal	2,557
Romania	2,625
Russia	4,368
Saudi Arabia	2,886
Singapore	5,455
South Africa	3,039
South Korea	2,555
Spain	10,231
Sweden	2,604
Switzerland	2,550
Taiwan	3,545
Thailand	3,094
Turkey	3,145
UAE	3,482
UK	20,303
USA	50,087
Vietnam	3,164

Notes on Methodology: Internet Penetration Rates

ACROSS GLOBALWEBINDEX'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 2019. 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.

GLOBALWEBINDEX VERSUS ITU FIGURES

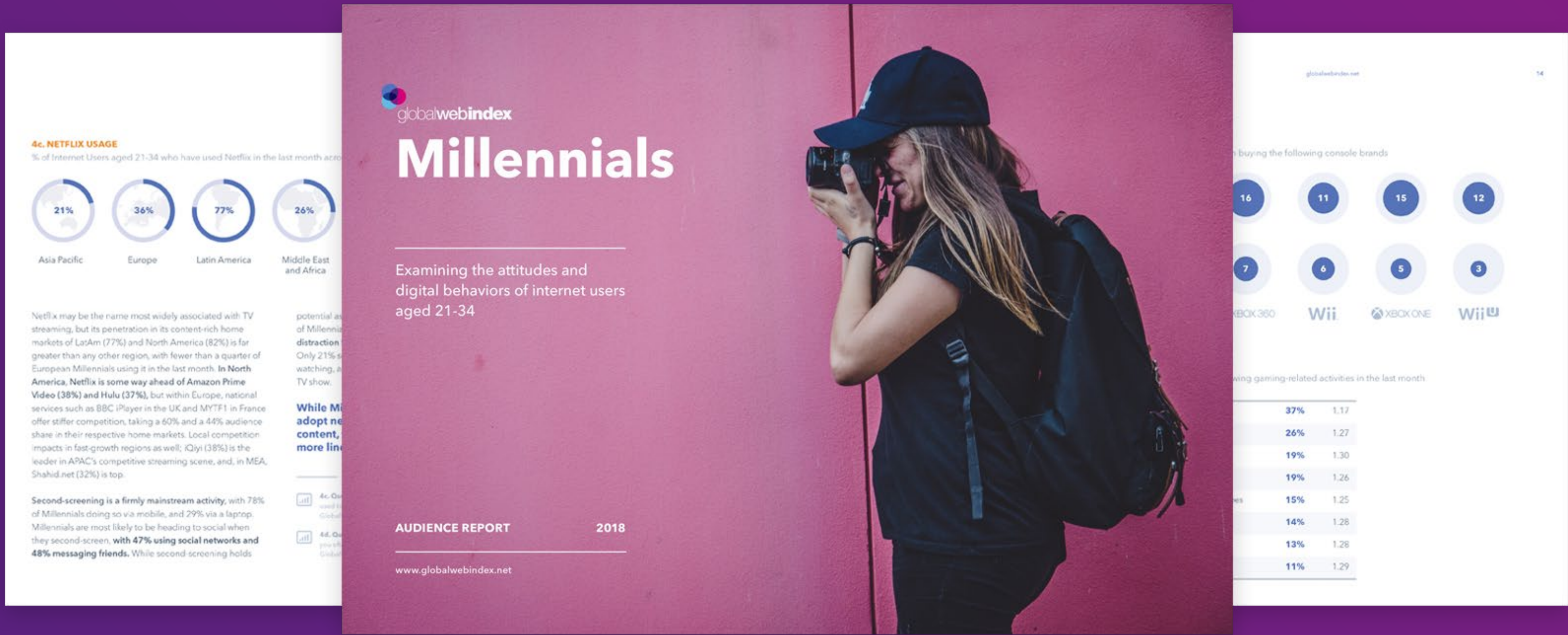
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

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.

Internet Penetration Rates

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data

Argentina	78%	Indonesia	39%	Russia	80%
Australia	88%	Ireland	87%	Saudi Arabia	83%
Austria	88%	Italy	62%	Singapore	85%
Belgium	89%	Japan	92%	South Africa	62%
Brazil	71%	Kenya	43%	South Korea	95%
Canada	94%	Malaysia	83%	Spain	87%
China	59%	Mexico	69%	Sweden	96%
Colombia	66%	Morocco	69%	Switzerland	96%
Denmark	97%	Netherlands	93%	Taiwan	83%
Egypt	54%	New Zealand	93%	Thailand	58%
France	85%	Nigeria	36%	Turkey	71%
Germany	88%	Philippines	64%	UAE	95%
Ghana	48%	Poland	79%	UK	96%
Hong Kong	91%	Portugal	78%	USA	80%
India	42%	Romania	72%	Vietnam	55%


globalwebindex
Millennials
Examining the attitudes and digital behaviors of internet users aged 21-34
AUDIENCE REPORT
2018
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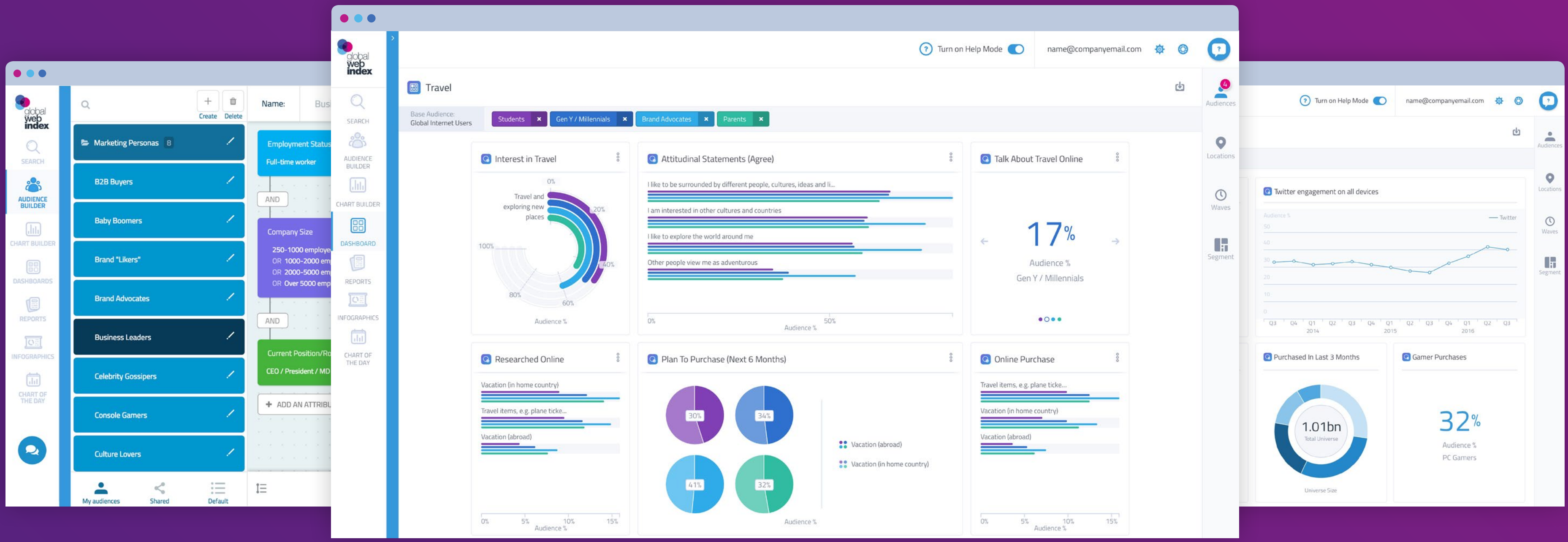

Get more from your data.

Run your own custom studies using our panel of 22 million consumers, and get instant access to insight tailored to your business needs.

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