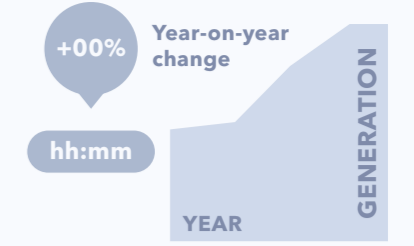


# Social Media by Generation

- Z** Gen Z
- M** Millennials
- X** Gen X
- B** Baby Boomers

## SOCIAL MEDIA TIME BY GENERATION

Average time spent per day on social media

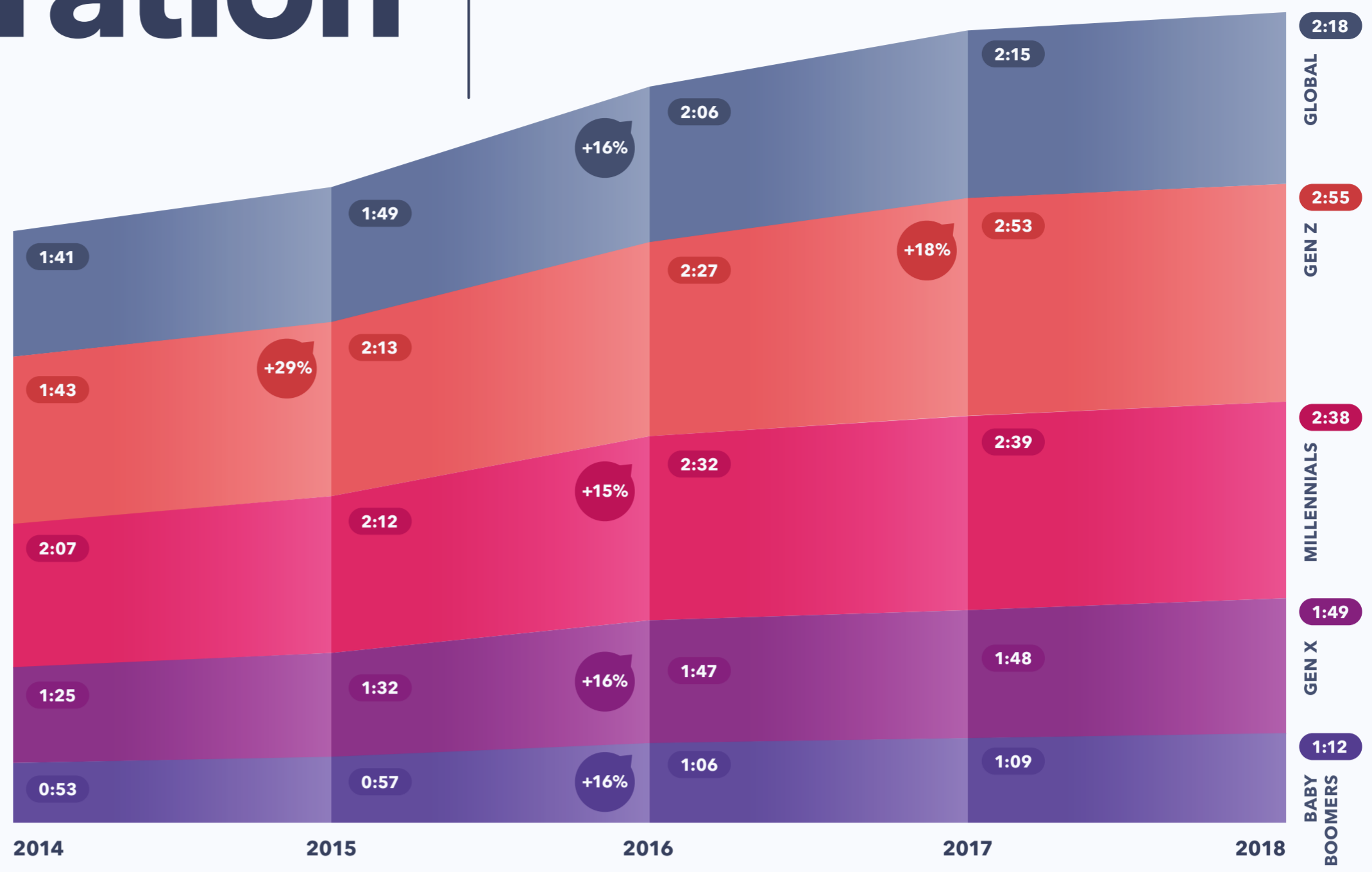


Growth in time spent per day on social media among Gen Z and millennials is slowing down over time

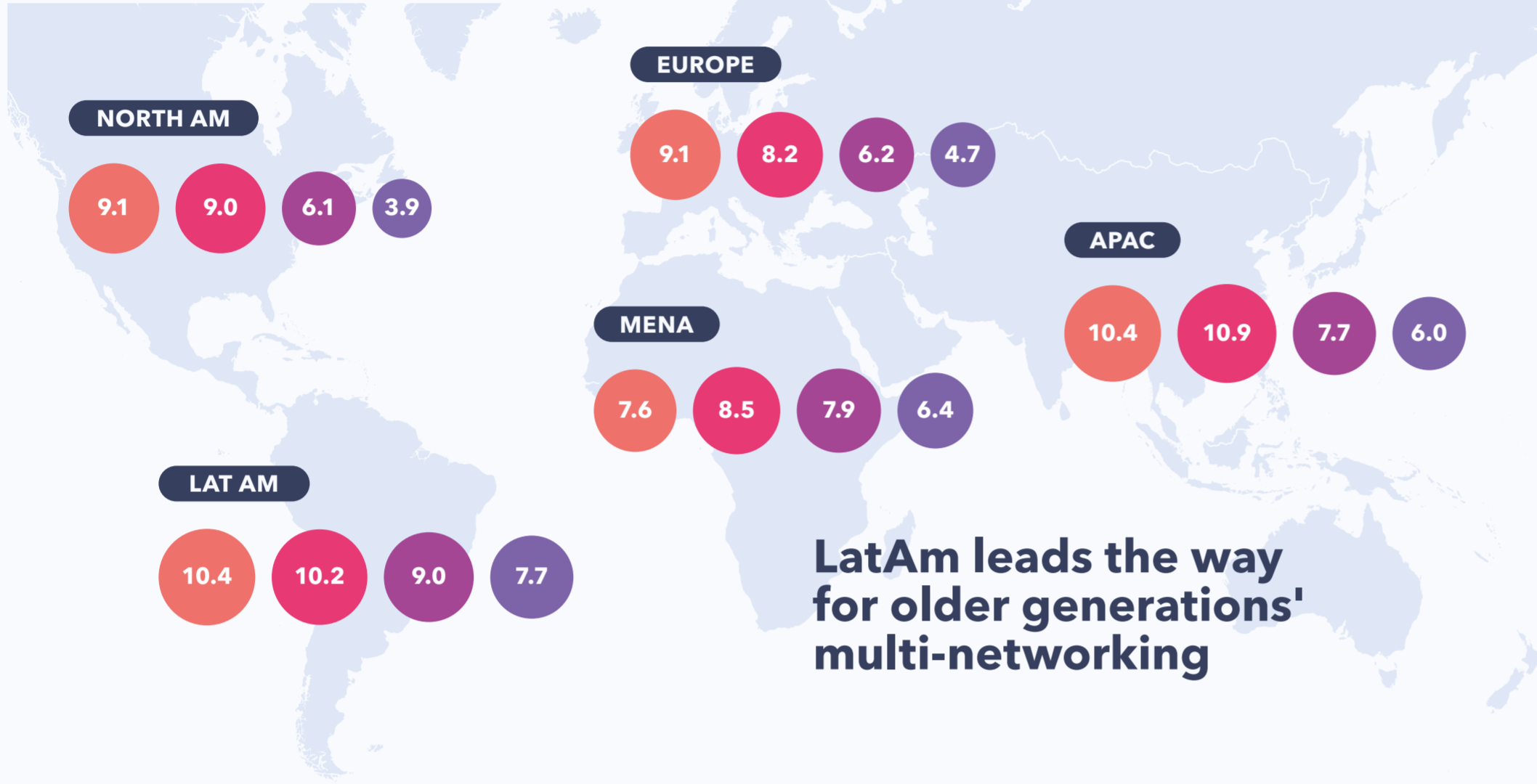
### AVERAGE DAILY SOCIAL MEDIA TIME\*

|                      |      |
|----------------------|------|
| Asia Pacific         | 2:13 |
| Europe               | 1:50 |
| Latin America        | 3:27 |
| Middle East & Africa | 3:03 |
| North America        | 2:04 |

\*Note that this data is an average of Q1-Q3 2018 figures.



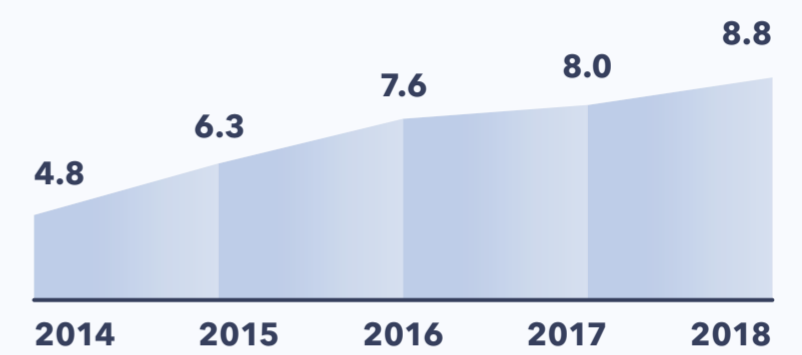
### MULTI-NETWORKING BY GENERATION\*



LatAm leads the way for older generations' multi-networking

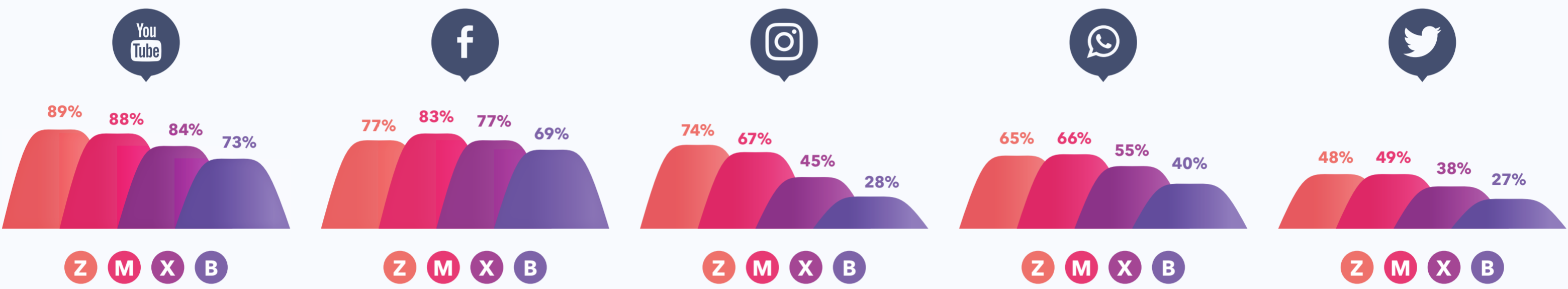
### Multi-networking is still on the rise, but could be plateauing

#### GLOBAL AVERAGE NUMBER OF SOCIAL MEDIA ACCOUNTS



## WHO USES WHAT?

% of internet users (exc. China) who have visited/used the platforms in the past month

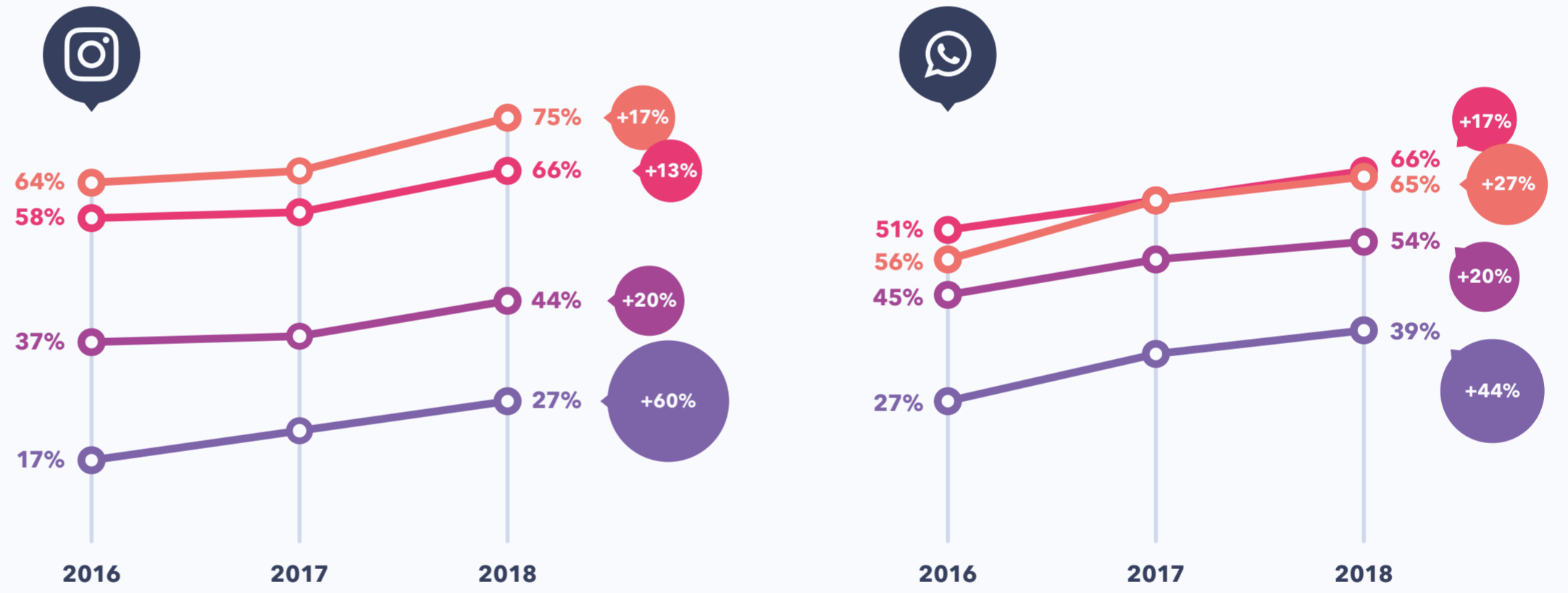


### INSTAGRAM AND WHATSAPP IN THE SPOTLIGHT

Baby boomers are showing the highest growth in Instagram and WhatsApp usage

% of internet users (exc. China) who have visited/used the platforms in the past month

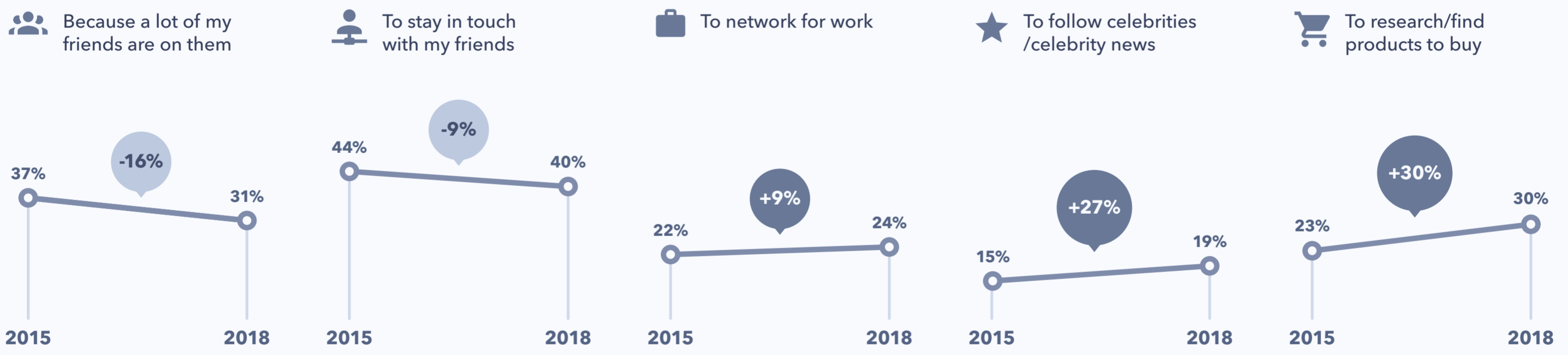
% change since 2016



## THE FUTURE OF SOCIAL MEDIA

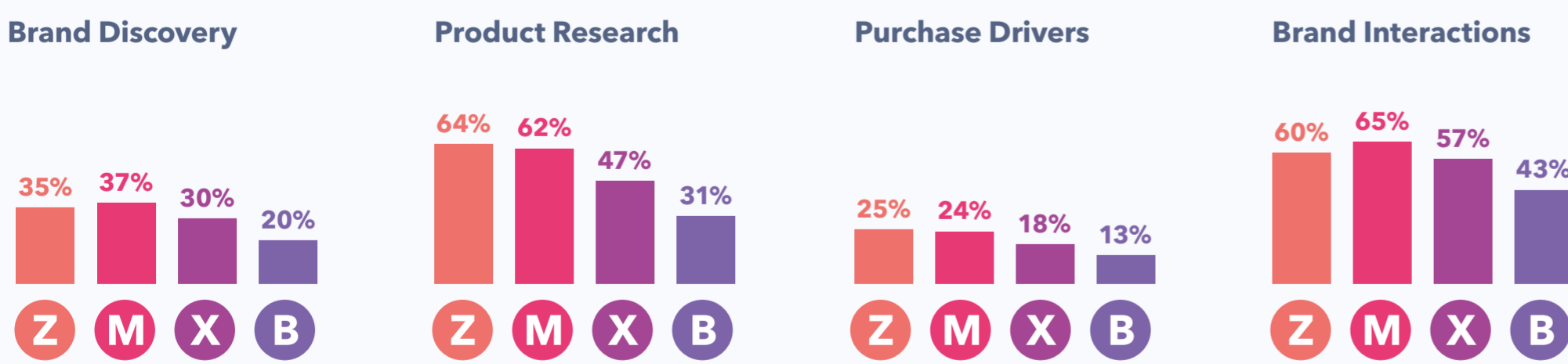
### CHANGING NETWORKING BEHAVIORS

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



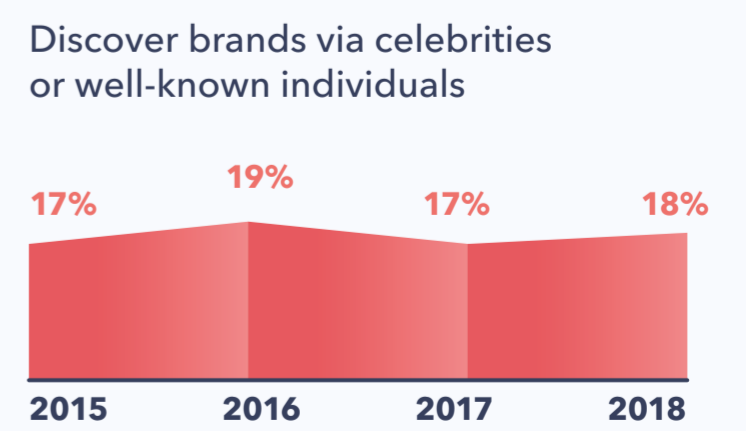
### SOCIAL KEY TOUCHPOINT THROUGHOUT THE PURCHASE JOURNEY\*\*

% who use social channels/state social channels are influential in the following



### Influencer marketing set to become bigger, Gen Z lead the way

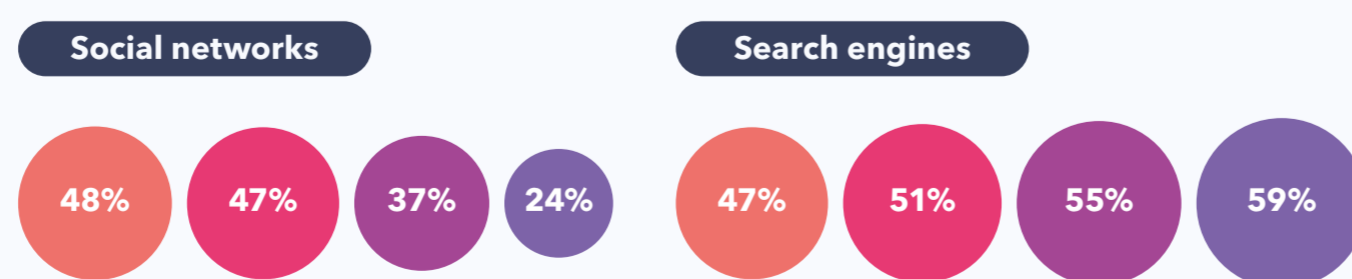
% of Gen Z who do the following



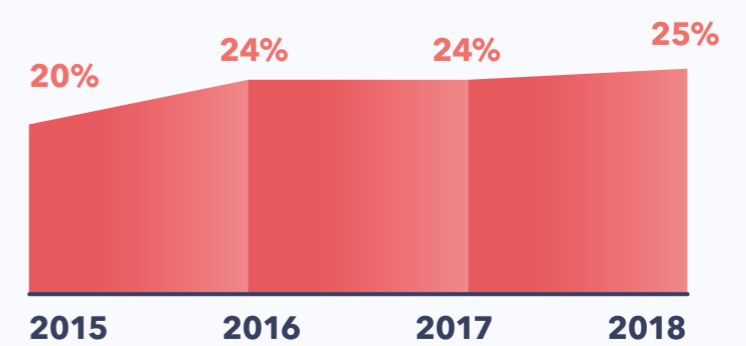
Social networks have surpassed search engines as the go-to product research channel for Gen Z

### HUB FOR ONLINE PRODUCT RESEARCH

% who use the following to find information about brands, products, or services online



Use social media to follow celebrities/celebrity news



Unless otherwise stated, all figures are taken from our Q3 2018 wave of online research among 113,932 internet users aged 16-64. Among this cohort, there were 16,228 Gen Zers aged 16-21, 44,483 Millennials aged 22-35, 39,595 Gen Xers aged 36-54, and 13,626 Baby Boomers aged 55-64. Generations have been adjusted in over time comparisons to account for year-on-year aging, hence earlier years include a relatively smaller group of Gen Z respondents as they age into our 16-64 sample.

Note that China is excluded from percentages relating to specific/named social networks and apps.

\*\* Breakdown of social channels in each purchasing stage are as follows:

#### Brand Discovery

- Recommendation/comment on a social network
- Update on a brand's social network page

#### Product Research

- Micro-blogs (e.g. Twitter)
- Social networks
- Online pinboards (e.g. Pinterest)

#### Purchase Drivers

- Option to use "buy" button on a social network
- Lots of "likes" or good comments on social media

#### Brand Interactions

- Asked a question to a brand on a social network
- Clicked on a promoted/sponsored post on a social network
- Interacted with a brand on a messaging app
- Liked/followed a brand on a social network
- Shared a brand's post on a social network
- Uploaded a photo/video to a brand's social network page
- Used a social networking "share" button on a website
- Visited a brand's social network page