

Social Video

Examining the implications of social video for marketing, commerce and the sports industry

TREND REPORT 2019

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Defining Social Video Viewers

This report defines Social Video Viewers as internet users outside China who have done either 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

This definition rendered a sample of 59,146 respondents from 40 countries.
To re-create this audience, access our Audience builder on the platform.

Introduction

GlobalWebIndex Trends Reports take a deep-dive into the crucial topics of the industry, exploring some of the most pressing topics for marketers. In this report, we place the spotlight on social video.

This report explores:

- **The evolution of social video** – how did video become a key part of social media; who are social video viewers?
- **The rise of passive networking** – how are people changing their social media habits and what are the implications for social video?
- **The role of social video in marketing and commerce** – why is social video a key marketing strategy and how does it support online purchasing?
- **Live streaming and entertainment** – why is live video instrumental to gaining consumer trust and what role does it play in the sports industry?

Key Insights

Although the growth in engagement with social video is slowing over time, it is still one of the most successful marketing techniques on **social media** (especially for marketers targeting younger demographics). It continues to transform how brands connect with consumers by developing advanced features and offering immersive experiences, resulting in more marketing success stories. **This brings new brands to the table and swells video's share of digital ad spend.**

Brands face the challenge of cut-through in quality and delivery of the message which makes the difference in social video. Consumers are confronted with many videos on their newsfeeds with every visit, and so to cut through this noise brands need to give the consumer something which is interactive and engaging. The rise of the vertical video format accompanied by emerging social platforms utilizing it, provides new ways of engaging users, while collaborations with genuine influencers proves an effective strategy to gain their trust.

For the foreseeable future social media's role will be to complement rather than replace traditional sports broadcasters, but this is likely to change as social video increasingly opens new revenue streams for social platforms and rights owners alike. The latter is likely to struggle to exist as a media outlet on its own since audiences today span across a multitude of devices and platforms. It's in their own interests that their sports brands expand their reach and that involves greater collaboration with social platforms.

As live streaming continues to gain momentum, this will accelerate the process by which major social media companies make in-roads into new industries. Entertainment has been among the first affected here, representing a new and challenging direction for the video and sports industries. Social media, and especially the likes of Facebook, begins to establish itself quite firmly in these new industries. But whether or not this will continue rests upon its ability to generate revenue, and above all, assure rights holders of the benefits that distribution via social channels present.

Social Video

The Evolution of Social Video

The Evolution of Social Video

The first instance of a social network adapting to mobile was in 2012 when Facebook made the decision to transition **from a desktop-centric business to a mobile-first one**. Four years later, the company got rid of its desktop advertising platform **FBX** to explicitly focus on **mobile advertising**, making it one of the biggest mobile marketing players today.

After successfully growing its mobile ad revenue, **Facebook realized that the next wave of growth was in video**, and decided to place it “at the heart of all of its services”. New functions like a new video tab and live video started emerging to the point where YouTube started facing a mounting challenge.

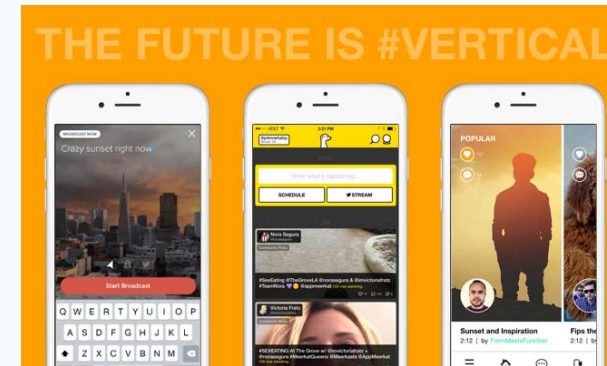
It wasn't long after that other social networks followed suit. **Twitter** reports that video is its fastest-growing advertising tool at the moment, with 1.2 billion video views each day, or a double growth in the past year alone. Fierce competition forced **Pinterest** to also enter the social video space by testing out a video tab feature.

Video positions social media as the go-to destination for everything from selling and shopping to live sports broadcast and commentary

Social networks' newsfeeds are now saturated with videos, and combined with the rise of live streaming, it's not surprising that more resources are being poured into video across the social media industry. According to **eMarketer**, social video ad spending (excluding YouTube) will reach \$14.89 billion in 2021 in the U.S., which will account for 30% of total video ad spending.

Today, social networks are universally used (99%), with the smartphone being the preferred device for this activity (90%), causing the boom of vertical video format. What's more, around **6 in 10 online adults can be classified as content networkers on social media**; they use social platforms to find funny or entertaining content, to watch sports events, or to follow vloggers (for more information on our social media segmentation click [here](#)). But watching videos on the major social platforms goes beyond just mere entertainment. **They signal a more immersive social experience which positions social media as the go-to destination for everything** from selling and shopping to live sports broadcast and commentary.

Vertical video format on social media



The ever-growing use of smartphones to access social networks has led to the rise of vertical video formats originally pioneered by **Snapchat**. The major platforms are now removing the **black bars** from vertical videos and launching **vertical video ads** in efforts to provide a better user experience for the majority of viewers which are on their mobile devices.

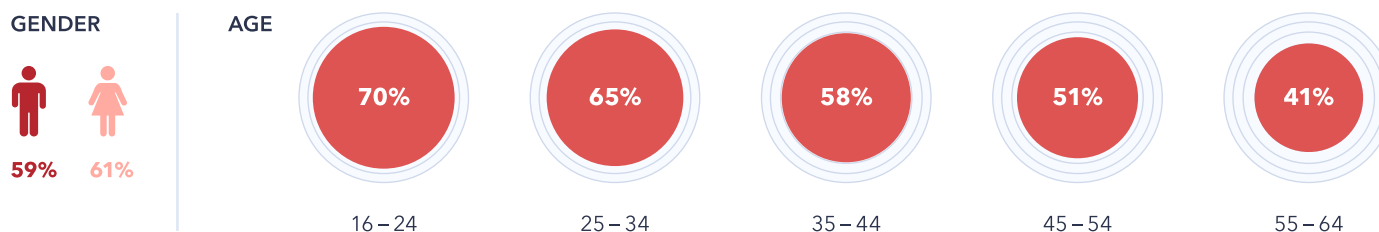
Vertical video has also become the focus of new players in the industry like **Firework**. It recently launched a new social video app whose USP is what Firework calls “reveal videos”. It enables creators to take both horizontal and vertical video in one shot, allowing video viewers to watch from a new perspective and see more of the scene by twisting their phone as the video plays. This new filming technique is likely to generate higher engagement by allowing creators to tell stories in new ways.

Profiling Social Video Viewers

Profiling Social Video Viewers

% of internet users who are social video viewers

 **60% OF INTERNET USERS ARE SOCIAL VIDEO VIEWERS**



The ease and accessibility of video in carrying out activities ranging from online shopping to news consumption makes it an ideal way to increase engagement on social media. Younger demographics emerge as the prime target here.

Younger internet users have a stronger tendency to use social platforms for reasons beyond simply networking and sharing details on their daily lives. They're more likely to go to social media for product research, news consumption and entertainment.

In fact, **social video consumption across four of the major social platforms outside China (Facebook, Twitter, Snapchat & Instagram) decreases directly in line with older age.** This is due in part to the higher usage rates among younger networkers overall.

The fact that 83% of 55-64s have watched a video clip on any device online in the past month demonstrates the **cross-demographic appetite for online video, and hence the potential for engaging older internet users with social video.**

6 in 10 online adults outside China have watched a video or a live stream on Facebook, Twitter, Snapchat or Instagram

Even though younger groups are leading the social video trend, their older counterparts will catch up fast



Question: Which of the following best describes your gender? // How old are you?
Source: GlobalWebIndex Q4 2018 **Base:** 59,146 Social Video Viewers aged 16-64 outside of China

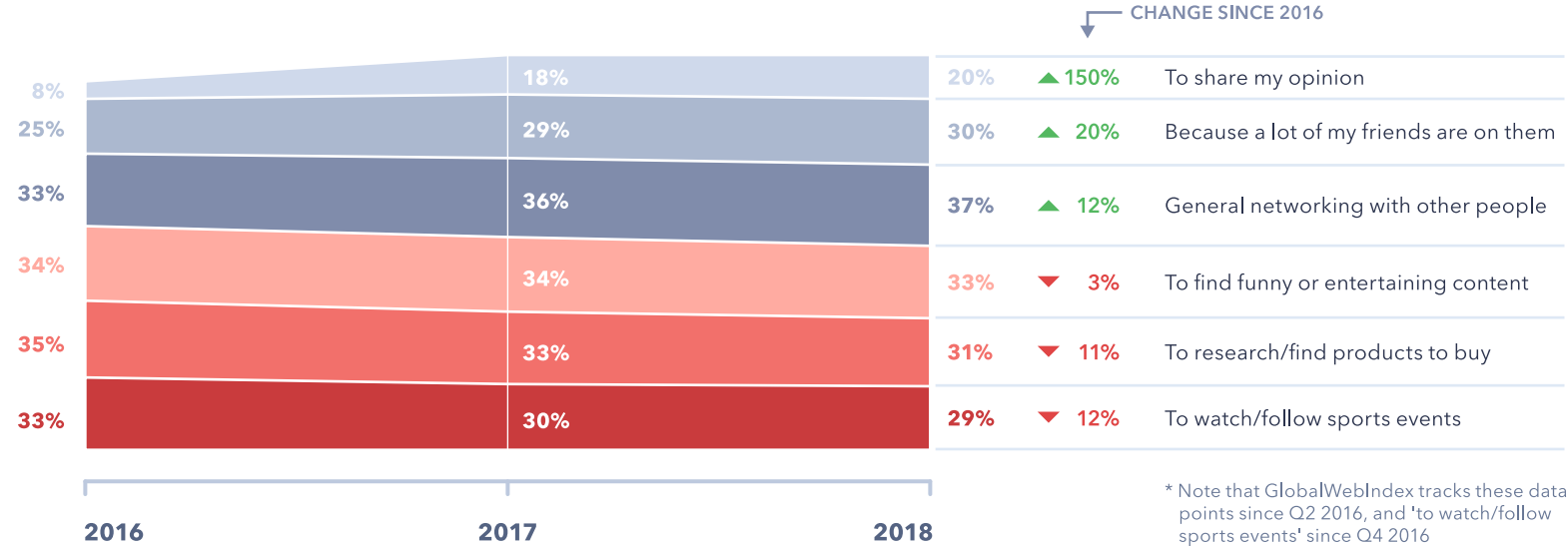
Social Video

The Rise of Passive Networking

Changing Engagement Patterns

Social Media Engagement Over Time*

% of internet users who say the following are their main reasons for using social media



AVERAGE TIME SPENT PER DAY ON SOCIAL MEDIA

H:MM



Social behaviors are becoming both more passive, and at the same time more purpose-driven in nature

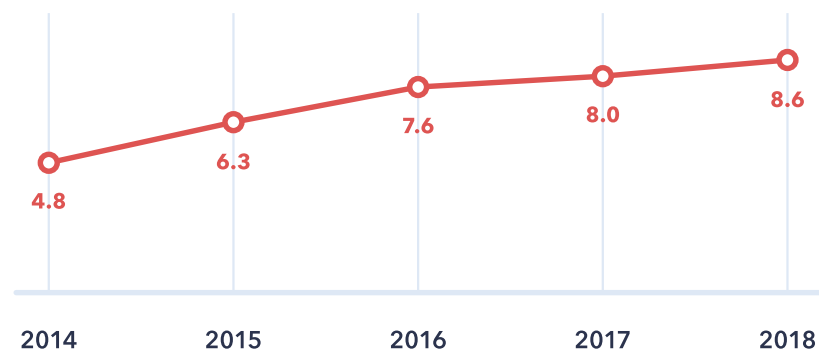


Question: What are your main reasons for using social media?
 // On an average day, how long do you spend on social media?
Source: GlobalWebIndex 2016-2018 (avg of all waves conducted in each year)
Base: 211,023 (2016), 272,735 (2017), 474,573 (2018) Internet Users aged 16-64

Changing Engagement Patterns

Multi-Networking Over Time

Average number of social media accounts held by internet users



One of the most striking changes in engagement patterns on social media has been the rise of **passive networking**. This means that **social activities are now less focused on sharing personal information and more purpose and entertainment-driven**. Behaviors like sharing personal opinions and meeting new people have been largely replaced by finding entertaining content and products to buy.

In the same period, **time spent on social networks continues to climb (although at a slower rate)**, reaching around 2h 20m per day. These year-on-year rises account for the fact that social activities are increasingly becoming more purpose-driven in nature. There's just so much more to do on these platforms now, and consumers are becoming savvier in how and why they use social media.

Over time, people's changing social media habits have also given rise to multi-networking. Over the course of the last few years, we've seen a handful of networks (i.e. Snapchat, Instagram and Pinterest) steer clear of the 'one-size-fits-all' model of Facebook, towards a more niche user-experience. This has allowed them to stake their claim in their own corner of the social media landscape. Networkers have been receptive of these smaller incumbents, which have benefited from positive brand images and smaller – more niche – audiences when sharing content. **That's why each year showed a rise in the average number of social media accounts per internet user.**

This was all true until the last couple of years when **the momentum behind this growth waned quite significantly, and it's likely to have reached a plateau.** And several key developments in the industry signal that a video-led status quo has settled on the social media space.



Question: On which of the following services do you have an account?

Source: GlobalWebIndex 2014-2018 (avg conducted across each wave of research)

Base: 168,046 (2014), 198,734 (2015), 211,023 (2016), 272,735 (2017), 474,573 (2018) Internet Users aged 16-64

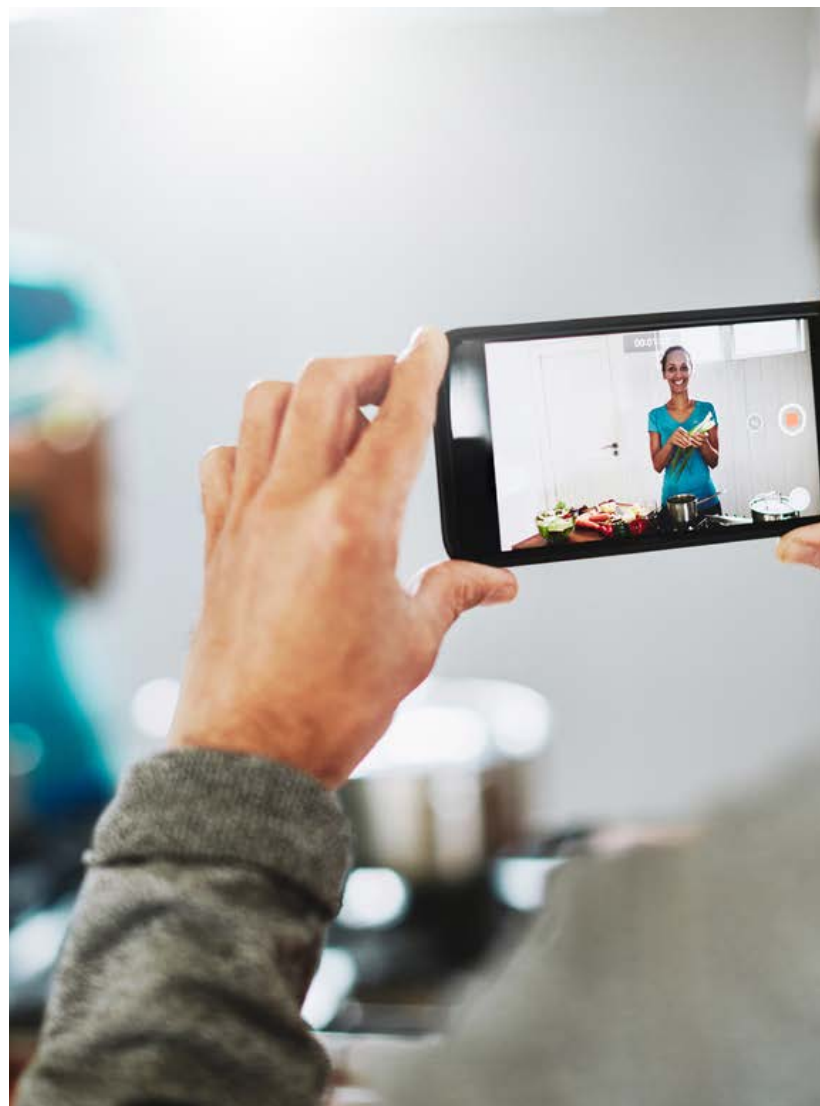
Video: The Entertainment Hub on Social Media

As we mentioned earlier, social media is becoming increasingly connected to the world of entertainment and that is largely due to the prominence of video. Platforms like Firework and TikTok are great examples of how **music, TV, film and sports are all moving under the social media umbrella, opening up new revenue streams for all parties.**

Facebook continues to react to challengers from these newly emerging platforms which are quickly rising in **popularity** by focusing exclusively on video and copycatting many of its best features. In efforts to generate more interest in its Watch platform, Facebook is **launching** a new program - referred to as 'Facebook Match' - from which it will fund and license new shows.

At the same time, the company **placed** IGTV videos in users' Instagram feeds in order to drive more traffic to the platform, expand its reach and make it more attractive to creators. In that way, the platform can drive further engagement and eventually start monetizing both Watch and IGTV with in-stream ads.

It's clear that Facebook is making moves to attract younger demographics, as TikTok does, by focusing on pushing more entertainment-driven content on its platforms. **The prominence that the social media giant puts on videos has secured itself a place in every news feed across various social media platforms and activities.**



Social Video

The Role of Social Video in Marketing & Commerce

Social Video in Marketing

The rise of smartphones is compounding the spread of social video. Beyond social engagement, other major online activities have also become primarily mobile-first; and online buying is one of them. **Today, 58% of internet users have purchased a product online on their mobile in the past month, while 30% have done it only on mobile.**

This demonstrates how **social media companies are very well-poised to offer these activities to internet users on their (mobile-optimized) platforms, and video can enrich each online activity.**

In the following sections, we outline how social video can do this, and why we need to look beyond just the news feed to understand the significance of this trend.

Social media companies are well positioned to offer a host of activities on their platforms, and video can enrich each online activity

Understanding consumer expectations is key to seeing the advantage of marketing via social video. Ad-blocking has overwhelmingly demonstrated the steps consumers are willing to take in order to protect their online journey from unwanted, intrusive or irrelevant content. **However, social media benefits from being a different online environment than other sites affected by ad-blocking.**

The quality of online experiences is as important, if not more, on social media. We know that networkers are now geared to

sift through content covering myriad topics (particularly videos) from friends or brands on their news feeds. This means that video content from marketers on social networks is less likely to appear intrusive which offers brands more opportunities in conveying their message and marketing campaigns.

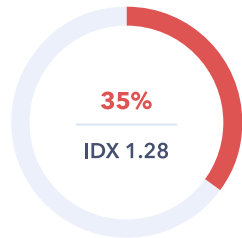
Using social video as a marketing strategy appears less intrusive than ads and allows brands more opportunities in conveying brand message

What made social video marketing such a hit is essentially the opportunity to portray the brand in different ways while engaging viewers more profoundly. In fact, more than 1 in 3 social video viewers have watched videos made by brands on any device online in the past month. What's more, they have an above average likelihood for clicking on sponsored posts on social networks (1.36 Index) or sharing posts from a brand (1.35 Index) which illustrates their willingness to use social media to engage with branded content.

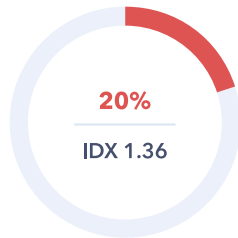
Social Video in Marketing

Social Video in Marketing

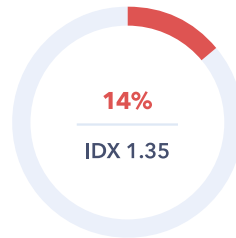
% of social video viewers who have done the following actions in the past month



Watched a video made by a brand



Clicked on a sponsored post on a social network



Shared a brand's post on a social network

Almost **4 in 10** internet users follow brands they like and over a quarter follow brands they are thinking of buying something from

TREND IN ACTION

Social video marketing success



Social video has proven a successful marketing strategy not only for beauty and retail brands, but also in the news media, and Bloomberg is a good example of that. Bloomberg has chosen video format as a more engaging way to explain the stories behind the headlines and distilling dense topical issues.

The media company **grew** its Instagram following by 400% in 2018 which was primarily driven by the growing number of monthly video views. Social video is key in helping Bloomberg to gain the trust of its audience (which is a crucial aspect of any media company) and as Jim Meadows, managing partner at Commit, puts it: *"It's popular because of the validity and depth of the stats they share in an era where audiences have less trust for thought pieces and clickbait headlines"*.



Question: Which of the following actions have you done online in the past month?
Source: GlobalWebIndex Q4 2018 **Base:** 59,146 Social Video Viewers aged 16-64 outside of China

Social Video in Marketing

YouTube Actions

% of social video viewers who have done the following on YouTube in the past month



Taking YouTube as an example, we can get an idea of how those watching videos on Facebook, Twitter, Instagram and Snapchat are engaging with online video, and how brands can apply this to their social video campaigns. **Video engagement is often purpose-driven** among this group, with between 40-50% outside China watching educational or tutorial videos on the platform. **This audience's engagement with influencer video marketing is also above average (1.34 Index) and growing.**

The rate of watching videos posted by celebrities or vloggers on YouTube have increased by 5% points over the course of two years to 36%

One of the key value propositions of social video marketing is its ability to bridge the gap between in-store shopping and online shopping. Brands can give consumers a deeper insight into the USP of their products using informative and inspiring videos, helping consumers in their purchase considerations (something which could be highly applicable in industries such as beauty and personal care). The 3 in 10 social video viewers outside China watching consumer reviews of products on YouTube reflects **buyers' tendencies to rely on video before making a purchase decision.**

TREND IN ACTION

Social video marketing success



YouTube **invested** \$20 million into attracting more educational videos like tutorials and other skill-based content on its platform in efforts to provide a more trustworthy and credible content for marketers to advertise on.

The initiative has directly fed into beauty tutorial videos, making them ever-more popular. **Vogue** is among brand publishers that have been immensely successful in adopting the how-to beauty social video as its own. Relying on big names like Kylie & Kendall, Rihanna, and Gwyneth Paltrow to share beauty tips on its channel, Vogue has managed to generate 1.7B YouTube views, and 3.6B Facebook video views in the past year.



Question: Which of these things have you done within the last month on YouTube?
Source: GlobalWebIndex Q4 2018 **Base:** 59,146 Social Video Viewers aged 16-64 outside of China

Commerce

Brand Interactions

% of social video viewers who have done the following in the last month



56% of online adults using augmented reality apps each month are social video viewers

Going through 2019, we see a changing commerce landscape, defined by an intersection between the online and offline shopping space. **Bridging this online-offline shopping divide doesn't just benefit the user experience on social media; it also enhances the offline experience too.**

'Showrooming' has demonstrated the power of smartphones in giving the consumer the advantage of finding the best deals online. However, physical stores will remain key especially to the customers of high-end brands as they provide a certain level of security when it comes to the quality of the merchandise. Social video plays a vital role here by building **awareness around the brand and its products by relying on modern technology.**

Location-based services and augmented reality (AR) applications on social media are slowly blurring the boundaries between online and offline. Retailers are increasingly using the technology to show consumers how products would look on them, hence helping people to make an online purchase with confidence without necessarily visiting a physical location.



Question: Which of the following actions have you done online in the past month?
Source: GlobalWebIndex Q4 2018 **Base:** 59,146 Social Video Viewers aged 16-64 outside of China

Commerce

After Snapchat pioneered the 'lens' feature of real-time face detection in 2015, the concept entered the beauty market at scale, with notable examples such as Sephora's Virtual Artist AR tool or Rimmel's 'Get The Look' AR app.

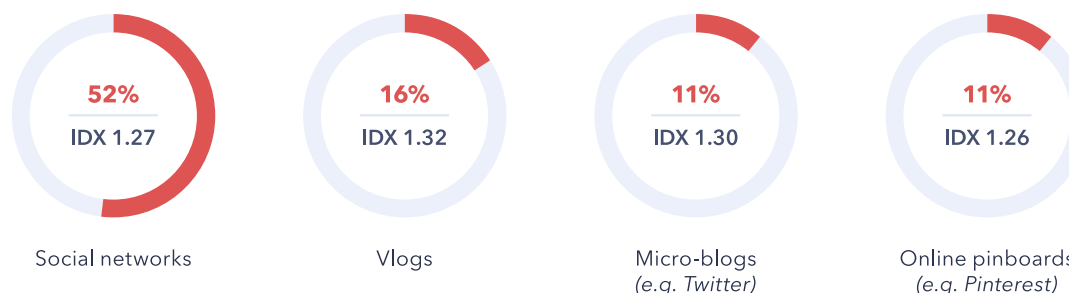
Social video viewers are very keen to interact with immersive functionalities offered up by businesses. This audience is much more likely than average to ask brands questions on social networks, to share branded posts with their friends, and importantly, to interact with brands on messaging apps.

As we explain in our **Social Commerce** report, **while APAC provides the most important examples of how the full potential of social commerce can be utilized, mature markets are making great progress in adapting social media shopping practices as well.**

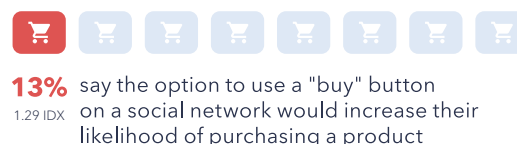
Social media is increasingly strengthening its role as one of the most effective channels for raising brand awareness, especially in the likes of direct-to-consumer companies. **And video is one of the most prominent features of the social commerce trend with its unique offering for immersive and inspirational experiences in online shopping.**

Product Research Channels

% who use the following online sources to research products



Social Commerce & Social Video



Social video can bridge the gap between online and in-store shopping experiences

Consumers want to make informed purchase decisions, and video is the best placed format for demonstrating what the consumers are after. Social video viewers are much more open to the idea of using "buy" buttons to purchase products on social media (29% above average). Their strong engagement with other video or social-based channels (particularly vlogs) when researching products indicates a level of trust with these sources to provide them with the key information they need.



Question: When shopping online, which of these features would most increase your likelihood of buying a product? // Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?
Source: GlobalWebIndex Q4 2018 **Base:** 59,146 Social Video Viewers aged 16-64 outside of China

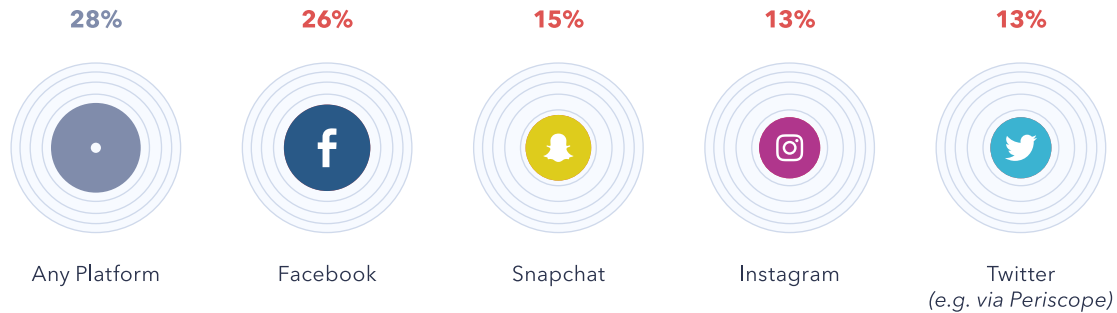
Social Video

Live Streaming & Entertainment

Live Streaming & Entertainment

Live-Stream Viewing on Social

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



Live video promotes a greater sense of trust, transparency and immediacy in the brand-consumer interaction

Live video has 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 allows brands to engage with consumers in a two-way interaction, with a greater sense of trust, transparency and immediacy.**

28% of Facebook, Snapchat, Instagram or Twitter users outside of China have engaged with live streams in the past month on any one of these services. **Facebook takes the lion's share here, having the largest user base (63%) as well as the highest engagement rates with live video (26%).**

Despite being one of the earliest entrants into the live video market, Twitter's Periscope attracts a much smaller share of its user base (13%). However, **Twitter's substantial presence outside of its main site/app (on Google search, for example), and non-Twitter members' access to Periscope live feeds do suggest higher engagement rates than these figures.**

Instagram users also hover around the 13% mark for viewing live video features on the platform. **Snapchat pulls slightly ahead**, with 15% of Snapchatters watching live streams on the platform each month.



Question: Which of these things have you done within the last month on Facebook / Instagram / Snapchat / Twitter?
Source: GlobalWebIndex Q4 2018 **Base:** 59,146 Social Video Viewers aged 16-64 outside of China

Live Video in Marketing

Live video has been home to many successful marketing campaigns which had three core aims: **build relationships** with consumers and allow **real-time feedback** and questions; **create transparency and trust** by using these live videos to give insight into the business; and **tap into the crossover between social media and brand advocacy**.

Influencer marketing is among the most effective marketing strategies among social live video viewers. Especially important is the role influencers play in the first stage of the purchase journey – brand discovery. Our data indicates that celebrity endorsements are the most influential brand discovery source for this group (1.85 Index).

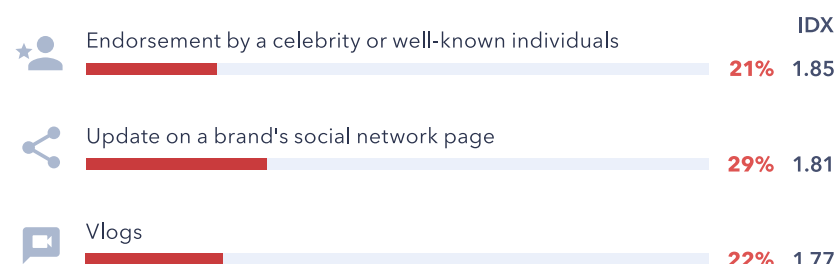
Meanwhile, enhancing online reputation is the highest over-index for brand advocacy motives (1.70 Index). **Using influencers who are relevant to the brand feeds into gaining the trust of the consumer**, while also offering the possibility of introducing the brand to new demographics or regions related to the influencer.

However, **due to the constraint-free space of social media, fraud and abuse are often associated with influencer marketing.** “Fake” influencers, who buy followers or use bots to artificially increase engagement, are so common today that social networkers and brands alike have lost a degree of confidence in promoting products and trusting sponsored posts.

At the same time, social media is an **environment which supports open dialogue and encourages honest feedback and reviews from fans**, proving an effective channel for the promotion of transparency and brand advocacy. This is reflected in our data as live social video viewers are 52% more likely to endorse brands when they feel they have insider knowledge about its products.

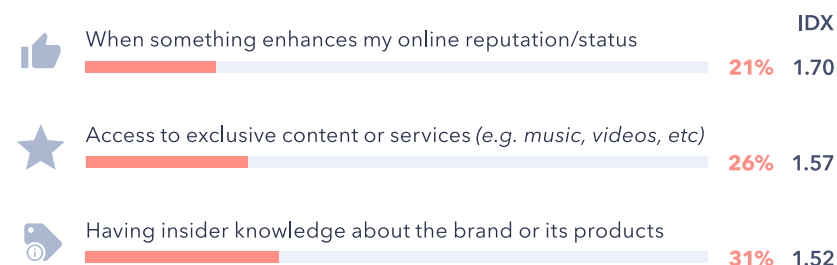
Live Video Marketing (Arranged by top over-indexes)

% of live video viewers who discover new brands/products/services via the following



Brand Advocacy Motivations (Arranged by top over-indexes)

% of live video viewers who promote a brand for the following reasons



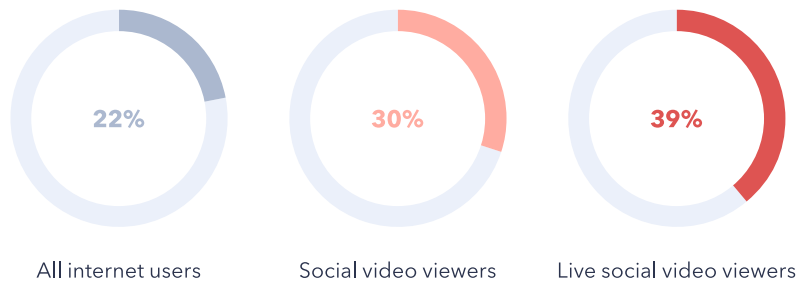
Question: In which of the following ways are you most likely to find out about new brands, products, or services? // What would most motivate you to promote your favorite brand online?

Source: GlobalWebIndex Q4 2018 **Base:** 24,794 Social Live Video Viewers aged 16-64 outside of China

Live Video & Sports

Watching Sports on Social Media

% who say watching/following sports events is a main reason for using social media



The sports industry is shifting from broadcast TV networks to social video

While live video on social media has allowed brands to connect with consumers in new and exciting ways, **it has also laid out opportunities for social platforms to explore, particularly in the realms of entertainment.**

Recently, the sports industry has had to become less reliant on millions paying to watch it on the big TV screen and instead offer fans other ways to keep up with the action – namely **by providing content, commentary and highlights across social media.**

The sports industry is already progressing towards digital and social media and there's still plenty of room for growth. Globally, more than a fifth 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.

TREND IN ACTION

Facebook deeply invested in the sports industry



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 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. In Hutton's words: "Rights holders can leverage our marketing tools to retarget viewers of their content and retarget them with ads that drive a number of different business objectives, so we can help them find their fans".

Facebook's partnership with the Professional Darts Corporation is among examples that show how instrumental sports streaming on social media can be in growing a global footprint. According to the agreement, Facebook screens tournaments to the previously untapped markets of U.S., South America and India, helping PDC to reach new heights.

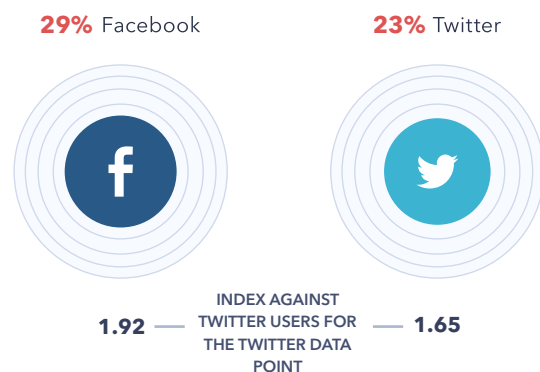


Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q4 2018 **Base:** 123,832 Internet Users aged 16-64 outside of China

Live Video & Sports

Engagement with Sports on Social Platforms

% of live social video viewers outside China on each platform who have commented about a sports event or match they're watching in the past month on...



“Twitter is the fastest way to find out what’s happening in the NBA and to have a discussion about it. Watching NBA basketball together with Twitter is a great experience, and the league has been at the forefront of embracing new ways to reach their fans.”

Jack Dorsey, Twitter CEO

This trend is also evident when we look at specific platforms. In the last month, 29% and 23% of this audience have commented about a sports event on Facebook and Twitter, respectively. It’s clear that the two platforms already own the commentary that happens around sports, **and the access to the broader conversation from around the world that these platforms provide appeals to users. Live social video enriches the viewing experience as users are able to engage with the available content while discussing with their counterparts, all on the same screen.**

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 live sports streaming. Last year, 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.** The former benefits from increased user bases and advertising reach, while the latter expands their fan bases and marketing reach. This is playing a key role in pushing live streaming of sports events fully to the mainstream.



Question: Which of these things have you done within the last month on Facebook/Twitter?

Source: GlobalWebIndex Q4 2018 **Base:** 123,832 Internet Users aged 16-64 outside of China

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 550,000 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**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2018 wave of research across 45 countries, which had a global sample size of 138,962 respondents. The sample by market breaks down as follows:

	SOCIAL VIDEO VIEWERS		SOCIAL VIDEO VIEWERS	
Argentina	736	1,543	Netherlands	432 1,300
Australia	1,966	4,019	New Zealand	638 1,278
Austria	518	1,271	Nigeria	0 1,000
Belgium	516	1,279	Philippines	891 1,608
Brazil	1,337	2,314	Poland	899 1,801
Canada	1,202	2,265	Portugal	717 1,265
China	2,692	15,130	Romania	696 1,307
Colombia	938	1,473	Russia	584 2,211
Denmark	565	1,258	Saudi Arabia	549 1,473
Egypt	913	1,763	Singapore	1,510 2,737
France	2,218	5,095	South Africa	783 1,531
Germany	1,784	5,135	South Korea	365 1,268
Ghana	0	1,000	Spain	2,969 5,161
Hong Kong	937	1,821	Sweden	631 1,302
India	4,363	7,522	Switzerland	552 1,261
Indonesia	871	1,747	Taiwan	882 1,755
Ireland	643	1,239	Thailand	792 1,492
Italy	2,676	5,188	Turkey	816 1,632
Japan	229	1,800	UAE	911 1,755
Kenya	0	1,000	UK	5,347 10,201
Malaysia	777	1,535	USA	12,615 24,995
Mexico	1,610	2,641	Vietnam	768 1,591
Morocco	0	1,000		

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

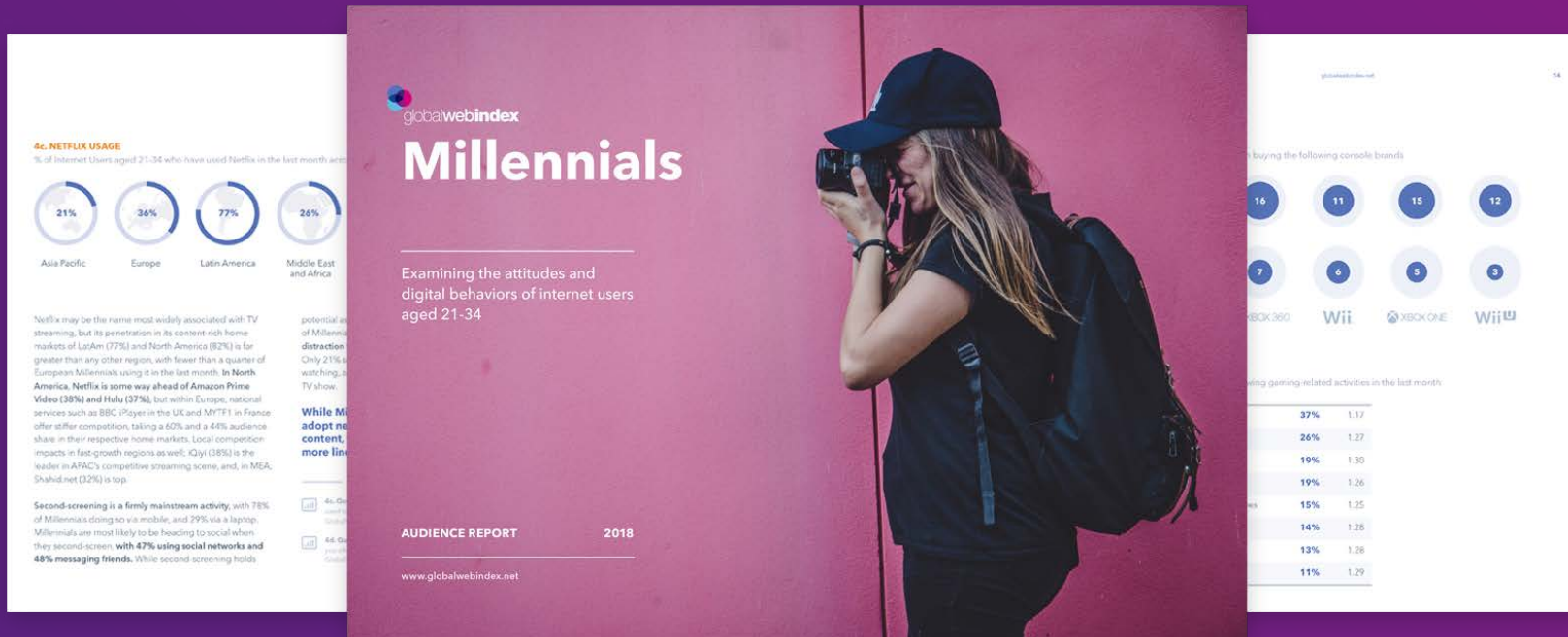
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

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

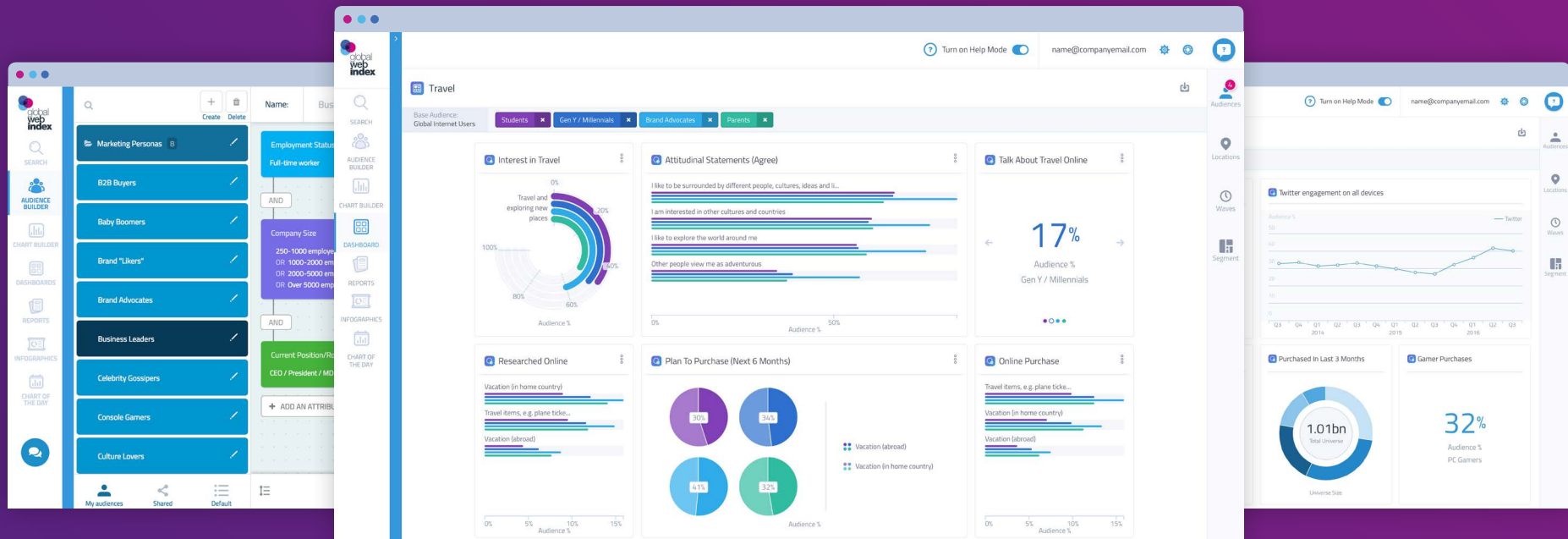
Argentina	78%	Indonesia	39%	Russia	80%
Australia	88%	Ireland	87%	Saudi Arabia	83%
Austria	88%	Italy	62%	Singapore	85%
Belgium	89%	Japan	92%	South Africa	62%
Brazil	71%	Kenya	43%	South Korea	95%
Canada	94%	Malaysia	83%	Spain	87%
China	59%	Mexico	69%	Sweden	96%
Colombia	66%	Morocco	69%	Switzerland	96%
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%



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Nisa Bayindir

Director of Global Insights

nisa@globalwebindex.com



Viktoriya Trifonova

Insights Analyst & Writer

viktoriya@globalwebindex.com

www.globalwebindex.com

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