globalwebindex

GWI

SOCIAL

SUMMARY

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

Q4 2016

Introduction

GWI Social is where GlobalWebIndex presents the very latest figures for social networking behaviors and engagement levels across 34 global markets.

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

- Overall engagement with social media
- Daily time devoted to social networking
- Multi-networking and cross-device behaviors
- The most popular networks, apps and services globally
- Top actions on leading platforms

In this summary version, we present some of the key insights and figures.

Pro Platform™

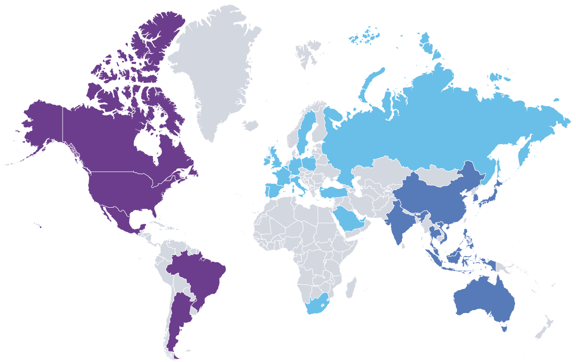
The questions and data-points featured in this report are available to explore on PRO Platform. They can be analyzed by any audience, date range or selection of countries/regions, with users able to build bespoke audiences based on our wide range of demographic, attitudinal and behavioral variables.

Explore this data in PRO Platform
/// Click here: **Social Media > Reach > Members**

Each chart is accompanied by a hyperlink which will take you to the appropriate section on PRO Platform; simply click on the relevant link to start exploring the data further.

Notes on Methodology

Each year, GWI interviews over 200,000 internet users, asking a wide range of questions about their lives, lifestyles and digital behaviors.



MARKETS COVERED

Argentina • Australia • Belgium • Brazil • Canada • China • France • Germany • Hong Kong • India • Indonesia • Ireland • Italy • Japan • Malaysia • Mexico • Netherlands • Philippines • Poland • Portugal • Russia • Saudi Arabia • Singapore • South Africa • South Korea • Spain • Sweden • Taiwan • Thailand • Turkey • UAE • UK • USA • Vietnam

To ensure that our research is reflective of internet users, we set appropriate **quotas on age, gender and education – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.**

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly. **Where a market has a high internet penetration rate, its online population will be relatively similar to its total population** and hence we will see good representation across all age, gender and education breaks. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, **the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.**

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

Sample Size by Market

Where data refers to Q1-Q3 2016 or Q3 2016, it is based on the following sample sizes:

	Q3 2016	Q1-Q3 2016		Q3 2016	Q1-Q3 2016
Argentina	766	2266	Philippines	759	2304
Australia	755	2257	Poland	756	2266
Belgium	750	2378	Portugal	758	2273
Brazil	1010	3010	Russia	1267	3858
Canada	1500	4508	Saudi Arabia	759	2260
China	5000	15281	Singapore	750	2250
France	2002	6007	South Africa	750	2273
Germany	2048	6065	South Korea	763	2270
Hong Kong	753	2262	Spain	2025	6030
India	1276	3805	Sweden	765	2266
Indonesia	754	2275	Taiwan	762	2278
Ireland	1005	3032	Thailand	775	2302
Italy	2022	6027	Turkey	750	2316
Japan	1000	2500	UAE	750	2305
Malaysia	762	2277	UK	7539	22759
Mexico	781	2356	USA	7509	22579
Netherlands	754	2310	Vietnam	750	2296

Terminology

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

- **Members.** People who say they have an account on the platform in question.
- **Visitors / Users.** People who say that, within the last month, they have visited or used a social network's website or app via any device.
- **Engagers / Contributors.** Members who say that, within the last month, they have actively engaged with or contributed to the platform in question.

These metrics are applied consistently across most services, which allows like-for-like comparisons in terms of popularity. Given that networks have differing definitions for "active users" or "MAUs", we do not report on this explicitly.

CHINA

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

Reports

GWI has a range of other reports available to download HERE

FLAGSHIP REPORTS

In addition to GWI Social, our other flagship reports present insights and statistics on device usage, online purchasing and entertainment

MARKET & REGION REPORTS

Tracking key digital behaviors and engagement rates at a national or regional level, providing the very latest headline figures as well as looking at trends over time and across demographics.

AUDIENCE REPORTS

In-depth examinations of particular groups, assessing their most important behaviors and motivations as well as what sets them apart from the wider online population.

INSIGHT REPORTS

Deep-dives into some of the most pressing topics for marketers, from traditional vs digital media consumption to audience measurement issues.

TREND REPORTS

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

INFOGRAPHICS

One-page visual summaries of key services, behaviors and audiences.

Engagement with Social Networking

▪ **94% of online adults have an account on at least one social media site,** with almost all internet users having visited or used one within the last month. Numbers peak in the youngest age groups and in fast-growth markets.

▪ People are most likely to use social media in order to keep up with friends (42%) or news (39%), or to fill time (39%). Tellingly, **all of the top five motivations are rather passive in character** and involve people looking at content posted by other users rather than contributing anything themselves.

▪ **Almost 4 in 10 follow their favorite brands on social media,** with 3 in 10 following news / media organizations.

SOCIAL ENGAGEMENT

% Who fall into the following categories

- Have At Least One Social Media Account
- Have Visited / Used a Social Network in Past Month
- Have Actively Engaged with / Contributed to a Social Network in Past Month

Question: On which of the following services do you have an account? // In the past month, which of the following things have you done on the internet via any device? Visited/ used a social network // Which of the following services have you actively engaged with or contributed to in the past month? /// **Source:** GlobalWebIndex Q3 2016 /// **Base:** Internet Users aged 16-64

Explore this data in PRO Platform /// Click here: **Social Media > Reach > Members**

▪ Globally, **digital consumers are now spending an average of 1 hour and 58 minutes per day on social networks and messaging.** That's a substantial chunk of daily media activities, with networking/messaging capturing almost 1 in every 3 minutes spent online. It's also a number which has increased by over 20 minutes compared to 2012. It peaks among 16-24s.

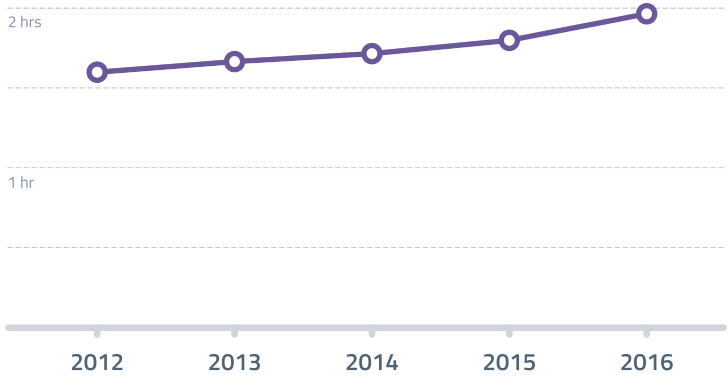
▪ Across **all 31 markets where trended data from 2012 is available, daily time spent social networking has increased.** Fast-growth markets spend the longest time on this activity, whereas mature markets in North America and Europe lag behind.

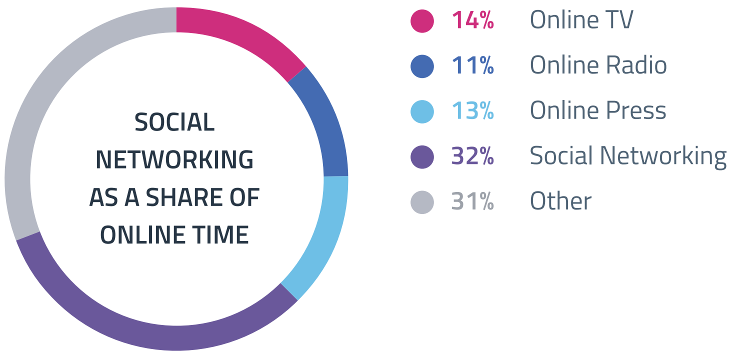
Question: Roughly how many hours do you spend on social networks/services each day? **///** **Source:** Source: GlobalWebIndex 2012-2016 (averages across all waves of research conducted in each year); % share figures are Q1-Q32016 **///** **Base:** Internet Users aged 16-64

Explore this data in PRO Platform ///
Click here: **Social Media > Time Spent Social Networking**

TIME SPENT SOCIAL NETWORKING

DAILY AVERAGE (HOURS : MINUTES)





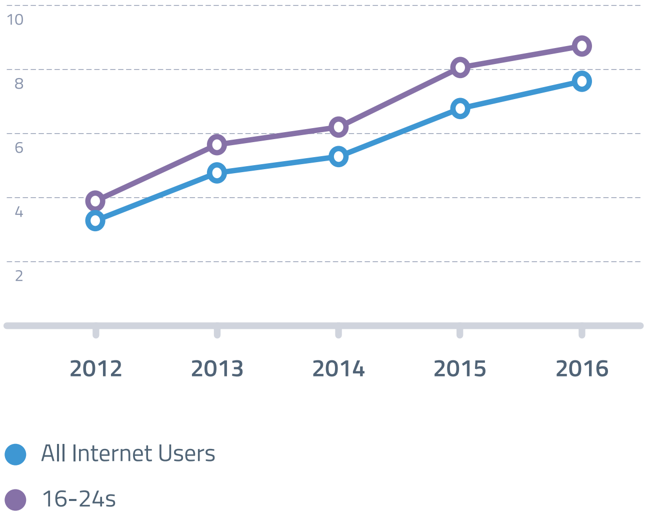
Multi-Networking and Cross-Device Behaviors

▪ Back in 2012, digital consumers had an average of just over 3 social media/messaging accounts; in 2016, this figure has risen to over 8. **That means people are members of more than twice as many networks/apps/services now as they were in the earlier part of the decade**. The type of anytime, anywhere access that smartphones are facilitating is a major driver here.

▪ As stark confirmation of just how dominant Facebook's eco-system of services and apps now are within the social landscape, it's some **88% of online adults who are a member of at least one of its four main services (Facebook, Facebook Messenger, WhatsApp or Instagram).** What's more, this is a figure that continues to trend upwards on a year-by-year basis. It's also the youngest age group which is furthest in the lead – with a striking **94% of 16-24s belonging to at least one of the four services.** That's food for thought the next time you hear that Facebook has lost relevance among the youngest users.

MULTI-NETWORKING BEHAVIORS

Average Number of Social Media Accounts



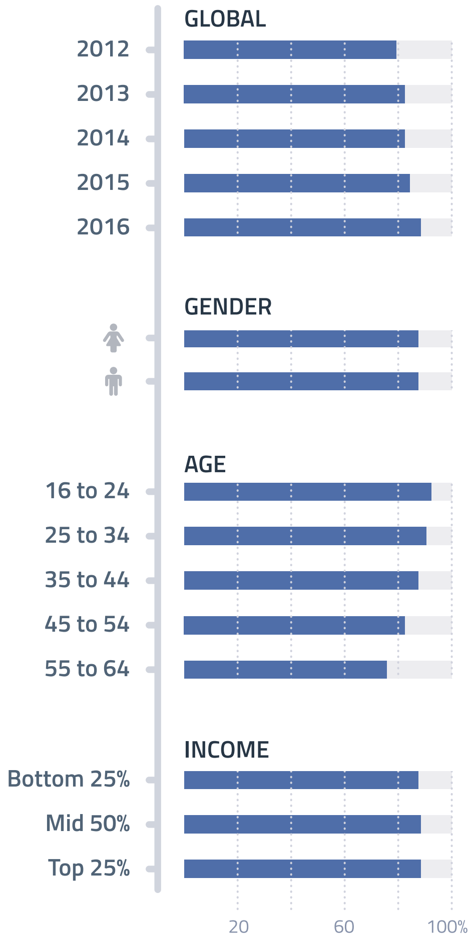
NOTE: Average number of accounts is calculated based on analysis c. 50 named networks + "Other". The named networks are a mix of global players as well as those specific to certain countries or regions

Question: On which of the following services do you have an account? **///** **Source:** GlobalWebIndex 2012-2016 (averages across all waves of research conducted in each year) **///** **Base:** Internet Users aged 16-64

Explore this data in PRO Platform ///
Click here: **Social Media > Reach > Members**

ENGAGEMENT WITH FACEBOOK SERVICES

% who have an account on Facebook, Facebook Messenger, WhatsApp or Instagram



Question: On which of the following services do you have an account? **///** **Source:** GlobalWebIndex 2012-2016 (over time), Q3 2016 (demographics) **///** **Base:** Internet users aged 16-64, exc. China

Explore this data in PRO Platform ///
Click here: **Social Media > Reach > Members**

▪ 78% are now networking via a mobile, with these devices leading for five of the six social-related activities tracked by GWI. Only blogging still remains slightly stronger on PCs/laptops. Age is once again crucial here; as might be expected, smartphones tend to lead most strongly among the key 16-24 demographic

ENGAGEMENT WITH FACEBOOK SERVICES

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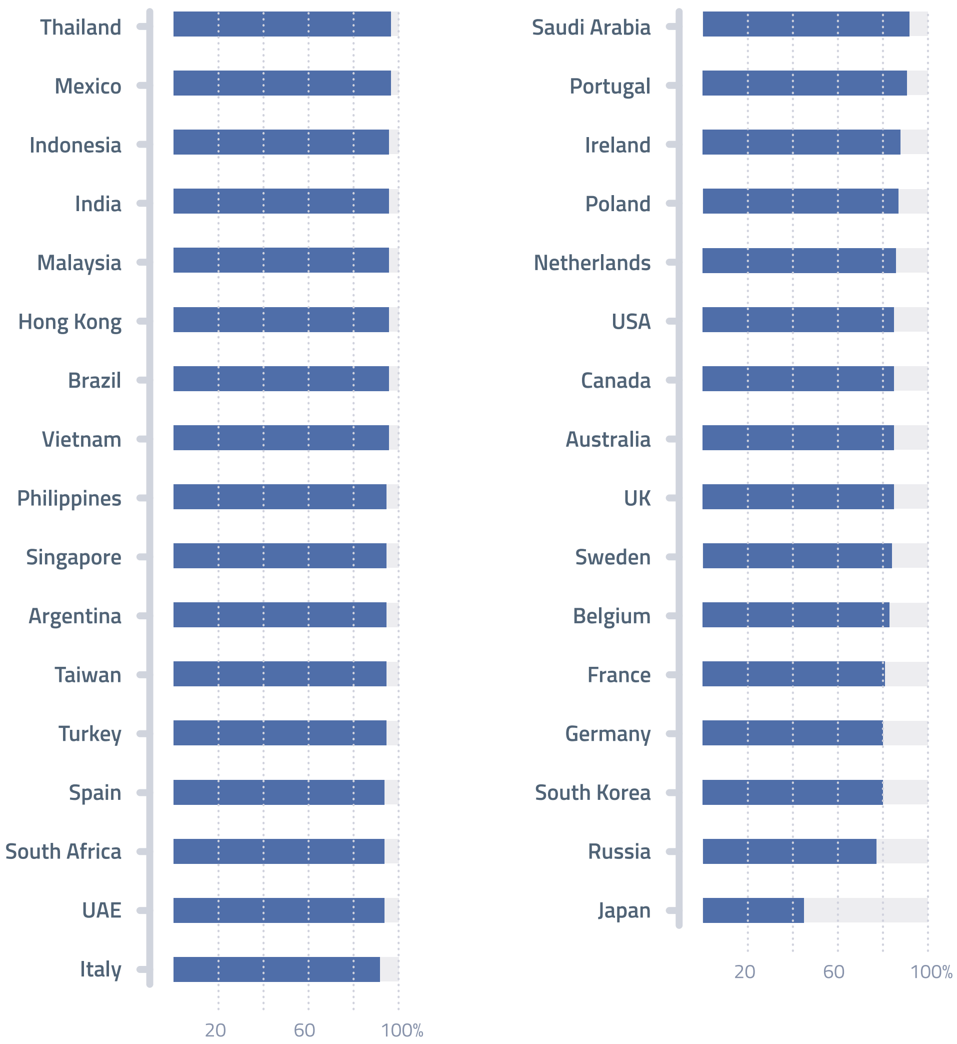


Question: On which of the following services do you have an account? /// **Source:** GlobalWebIndex Q3 2016 /// **Base:** Internet users aged 16-64

Explore this data in PRO Platform /// Click here: **Social Media > Reach > Members**

Top Social Platforms and Services

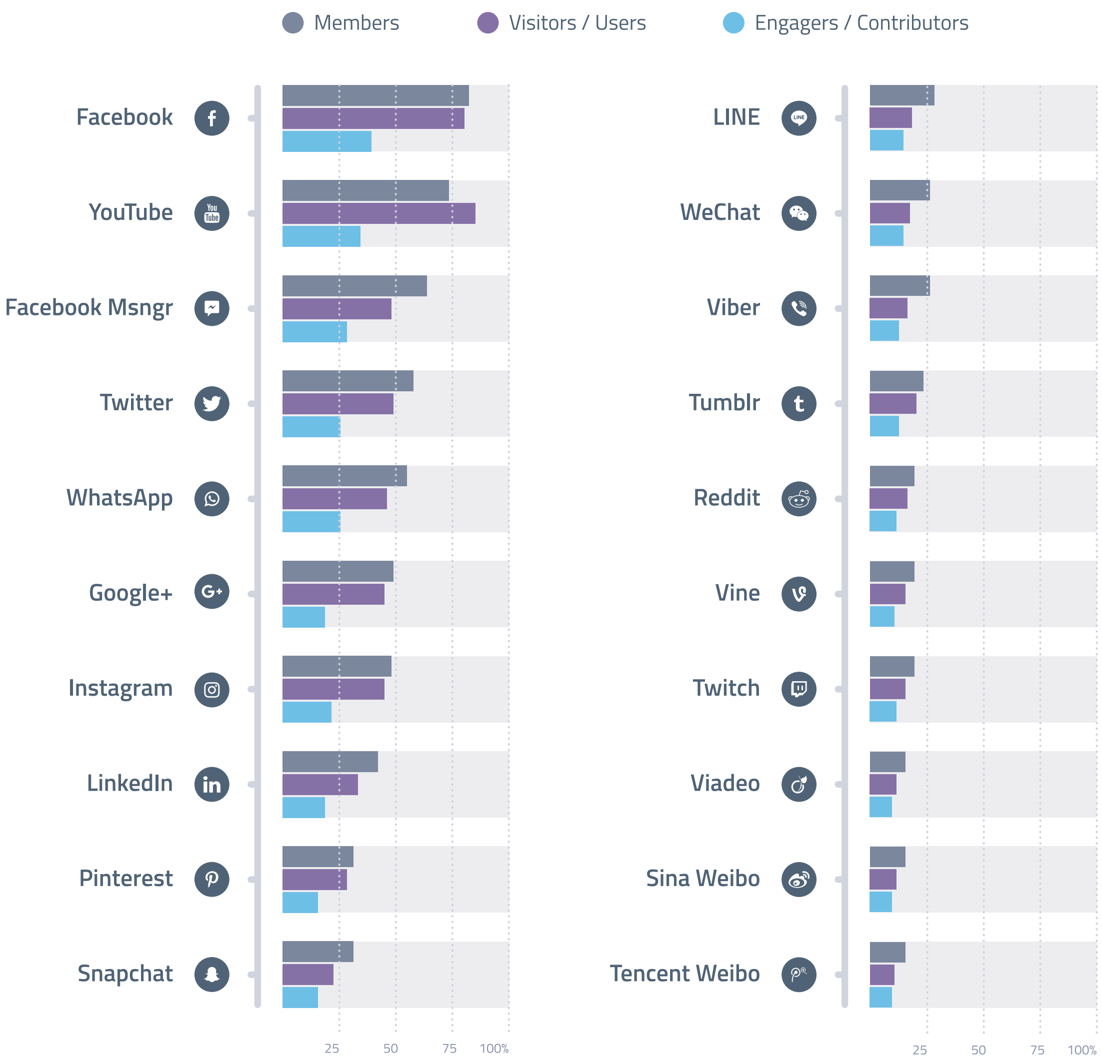
▪ Globally, **Facebook remains the top network for membership (84%) and contributions (40%) but YouTube just edges ahead for visitors (87%). Facebook posts near parity between its membership and visitor number** – in fact, it has one of the best ratios of members vs visitors of any of the bigger networks tracked in the chart (with Instagram also performing well on this metric). So, the vast majority of people with an account are visiting the site in some way, even if only 40% consider themselves to be actively engaging with or contributing to it.

▪ In the battle of the messaging services, **Facebook Messenger (65%) has a lead over WhatsApp** (56%) for membership, but WhatsApp is virtually level for visitors/users. WeChat is absolutely dominant in China; over 90% have an account.

▪ By some distance, it's **WhatsApp and Facebook which post the best figures for visit frequency among their users,** suggesting that Facebook remains the default hub for traditional networking activities and that WhatsApp is a major go-to point for simple messaging behaviors. Both of them are around 20-25 points ahead of YouTube and around 40-50 points ahead of names like LinkedIn and Vine.

TOP 20 SERVICES

% outside of China who fall into the following groups



Question: Members: On which of the following services do you have an account? // Visitors/Users: Which of the following sites/applications have you visited in the past month via your PC/Laptop, Mobile or Tablet? // Engagers/Contributors: Which of the following services have you actively engaged with or contributed to in the past month via any device? **/// Source:** GlobalWebIndex Q3 2016 **/// Base:** Internet users aged 16-64, exc. China

Explore this data in PRO Platform /// Click here:
Social Media > Reach > Members

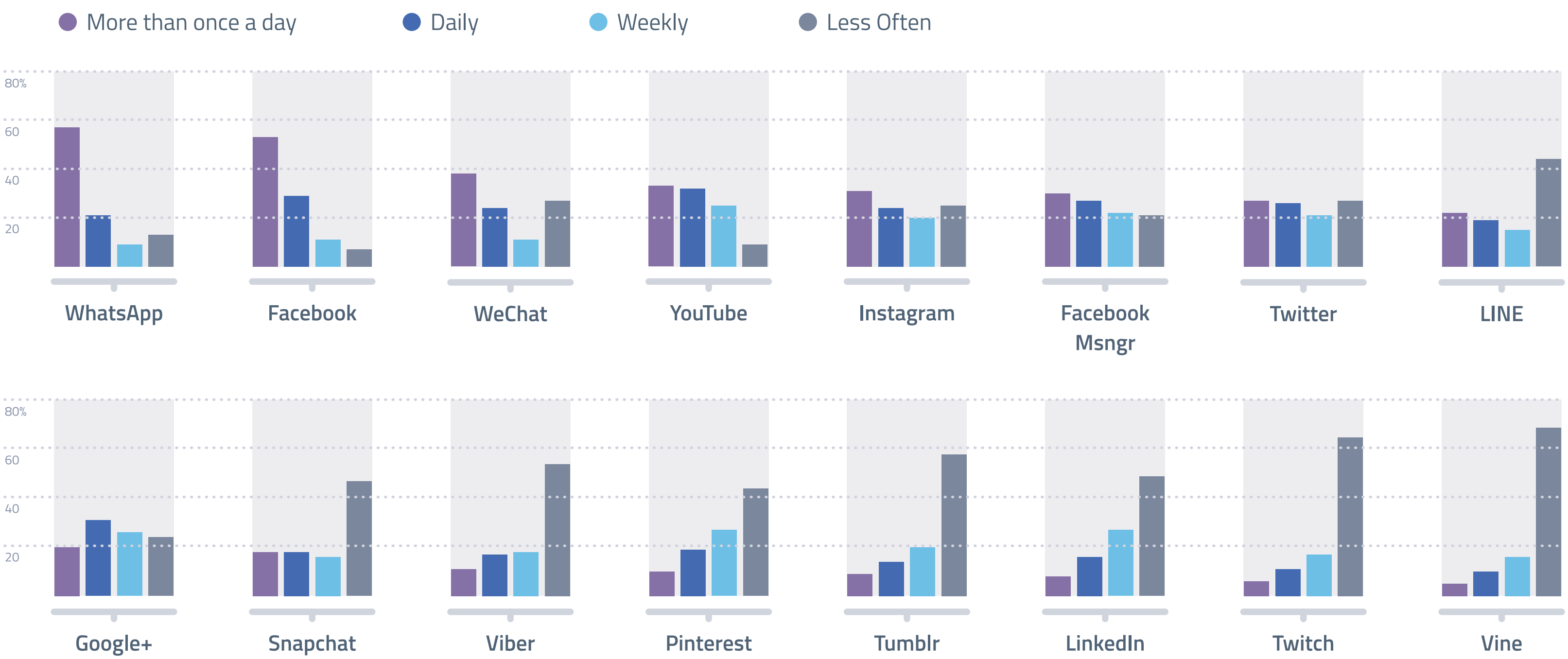
▪ **Twitter stills retain a slim global lead over Instagram for visitation, and remains ahead in 15 of the markets tracked in our chart** (especially in Japan, Spain, the UK, Mexico and India). However, Instagram now has the edge in 16 of the 33 markets and has built up a considerable advantage in places like Hong Kong, Sweden, Singapore, Taiwan, Russia and Portugal. It is also ahead among the key 16-24 demographic.

▪ **Snapchat, Tumblr, Vine and Instagram have the youngest audiences,** with about 40% or more of their respective visitors/users coming from the 16-24 group. Facebook and LinkedIn have the oldest audiences.

▪ **Snapchat's popularity among teens remains considerable;** more than 50% of this audience are using it in 13 of the 33 markets tracked. Snapchat's top 10 markets currently comprise Ireland, Sweden, the UK, the UAE, the Netherlands, Belgium, France, Australia, the US and Canada. In short, then, Snapchat's appeal is broadening with each quarter that passes but right now its strongest performance is still among teens in key mature markets across Western Europe and North America.

FREQUENCY OF USAGE

% who use each service on the following basis



Question: Thinking about the social platforms that you actively engage with or contribute to, can you please tell us how often you typically use each one? **/// Source:** GlobalWebIndex Q3 2016 **/// Base:** Users aged 16-64, exc. China

Explore this data in PRO Platform /// Click here: **Social Media > Usage Frequency** globalwebindex

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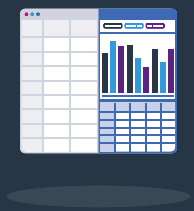

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