

GWISOCIAL SUMMARY

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



Q1 2015

INTRODUCTION

GWI Social is where GlobalWebIndex presents the very latest figures for social networking behaviors and engagement levels across 33 global markets.

Drawing on our Q1 2015 wave of research among 47,622 online adults, we highlight a range of demographic, region and market specific trends and offer insights on:

- The most popular social networks and apps, including rates of growth during the last year
- Time spent on networking, as well as how many platforms the average person is using
- The growing importance of mobiles and messaging apps
- Trends among younger groups, and teens in particular

By analyzing such recent and robust data – which is representative of 90% of the global internet audience – we are able to cut through the headlines and hype to provide a unique understanding of what’s actually happening within the social media landscape.

In this summary version, we present some of the key trends and stats from the report.

RELATED CONTENT

For further detail on some of the subjects and networks covered in this report, please download the following:

- ***GWI Profiles*** – showcasing key trends and numbers for some of the world’s largest social networks, apps, digital brands and media providers – including Facebook and Twitter
- ***Twitter Users*** – Profiling the demographics, attitudes and digital behaviors of Twitter’s Active Users
- ***Social Networking Motivations*** – profiling the top reasons for using social media across demographics and between countries
- ***Market Reports*** – in-depth explorations of social and digital trends in each of GWI’s countries
- ***Social Media Engagement*** – going beyond the simple MAU metric to analyze how people are accessing social platforms, how frequently active users are logging in, how much time is spent per day on social networks and exactly what activities are taking place
- ***GWI Trends*** – tackling the stories of the moment, including the size of Instagram’s audience, the importance of Twitter’s logged-out visitors and the spread of Multi-Networking

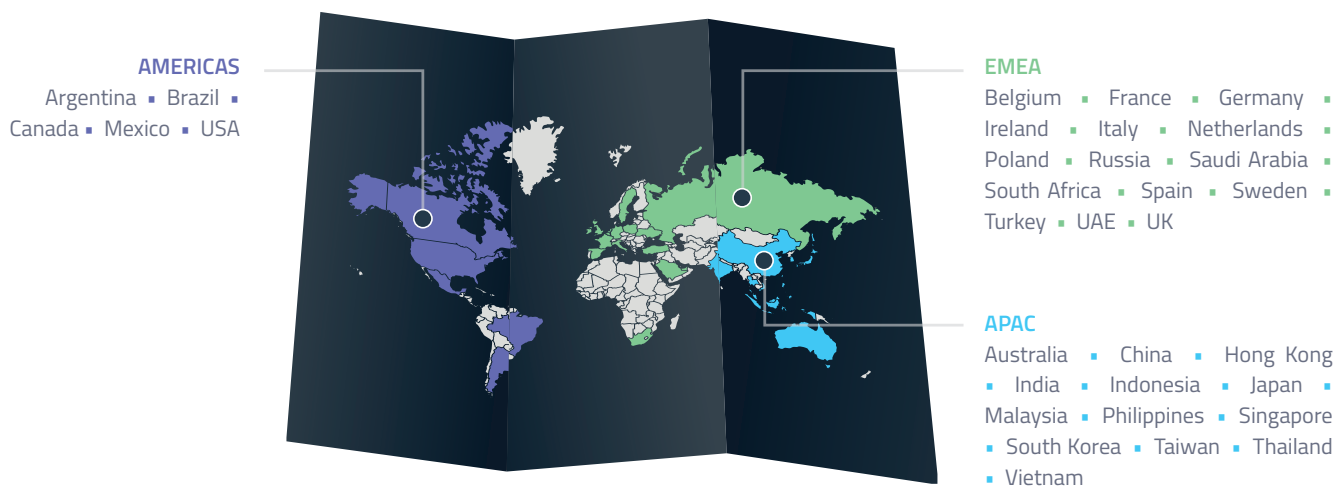
NOTES ON METHODOLOGY

SAMPLE SIZES AND UNIVERSE FIGURES

Each year, GWI interviews **200,000 internet users across 33 markets** – making it the largest on-going study into the digital consumer instigated to date. Research is conducted in **quarterly waves, each of which has a global sample size of 45,000 – 50,000 internet users**. Typically, we interview between 3,000 and 8,000 people per year per market, with larger sample sizes in key countries such as the UK and the US (30,000 each). Data is collected in the last six weeks of every quarter, ensuring it is as up-to-date as possible. In this particular report, we draw primarily on our Q1 2015 wave of research among 47,622 adults.

Respondents complete an **online questionnaire** that uses stratified sampling techniques to ensure that they are **representative of the internet population aged 16 to 64** in each country (with correct proportions in terms of gender, age and educational attainment).

This data is also used to calculate our **universe estimates** – figures which are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.



GWI's USAGE DEFINITIONS

We measure three forms of engagement with social platforms, defined as follows:

- **Account Ownership/Membership** – those who say they have an account on a social network
- **Visitation** – those who say they have visited the network in question in the last month (via any device)
- **Active Usage** – those who have an account and say they have used or contributed to the network in the last month (via any device)

These definitions are consistent across all of the platforms we track and thus allow accurate comparisons between networks. In contrast, self-published figures from social networks tend to use a wide and competing range of factors, but would typically utilize 'Visitation' as a definition of 'Active Usage'. To see an example of this and explore GWI's numbers in more detail, please download the [Understanding Facebook's User Numbers](#) trend from the Insight Store.

CHINA

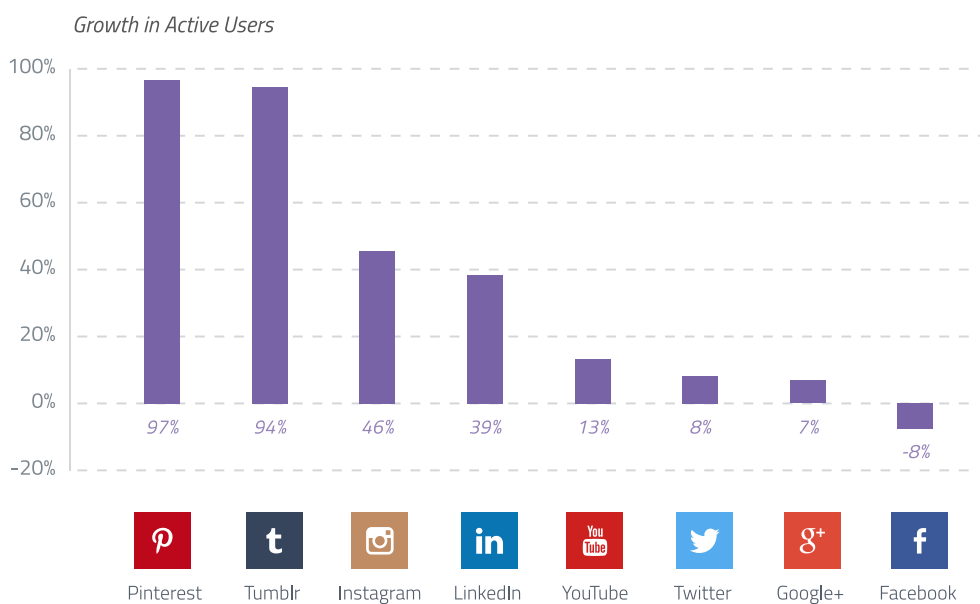
In addition to using local networks, it's clear that large numbers of internet users in China are connecting to major global platforms such as Facebook via VPNs, Proxy Servers and other tools – something we address in the charts dedicated to Chinese social networking and which we explore further in our [Market Report](#) on China's internet population.

However, due to the sheer scale of the Chinese market, its high number of local social networks and the official restrictions it places on 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).

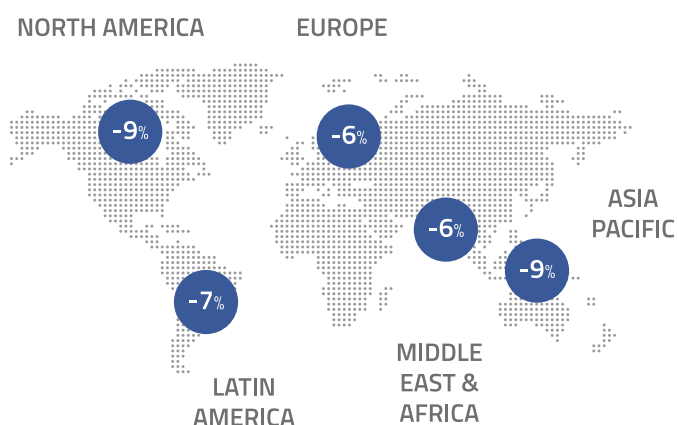
FACEBOOK DOWN AS TUMBLR & PINTEREST CONTINUE TO RISE THE FASTEST

- Facebook still has the most members (82%) and active users (42%), but is the only major network to have seen a drop in active usage during the last year (-9%). And, on a monthly basis, more people are visiting YouTube (81%) than Facebook (73%).
- That said, over 50% of Facebook's active users are engaging with the site more than once a day – far higher than the equivalent figure on any other network. What's more, 26% of US/UK internet users are interested in Facebook At Work, with the figure peaking at 49% among LinkedIn users.
- Pinterest (+97%), Tumblr (+95%) and Instagram (+47%) were the biggest climbers in the social networking space last year, while LINE (+57%), Facebook Messenger (+53%) and Snapchat (+45%) were the fastest growing apps.
- Ello has failed to make an impact; just 5% of people are using it.

TOP SOCIAL PLATFORMS: GROWTH IN ACTIVE USERS DURING LAST YEAR



Facebook: Change in Active Usage in Last Year



Members: Which of the following services have you used or contributed to in the past month using any type of device? // **Source:** GlobalWebIndex Q1-Q2 2014 vs Q4 2014-Q1 2015 // **Base:** Internet users aged 16-64, exc. China

Want to explore this data in PRO Platform? Click here: [Social Media > Social Platforms > Active User](#)

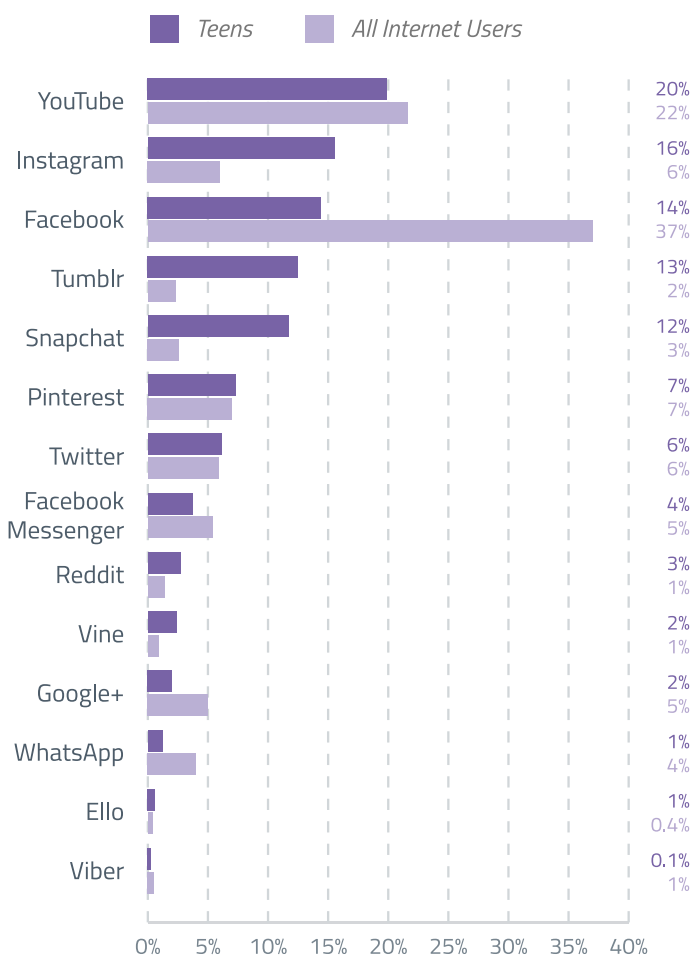
YOUTUBE IS THE "COOLEST" PLATFORM FOR TEENS

▪ That Facebook has an **image problem among certain key demographics is clear**. Ask all internet users in countries like the US and UK to pick the "coolest" social network and Facebook is still top dog – not bad for a network which is more than a decade old. However, ask the same question to teens only (defined here as 16-19s) and Facebook's rating tumbles dramatically. **While 37% of all adults name Facebook as the "coolest" network, just 14% of teens agree**. In fact, among this much-coveted and trend-setting audience, it's **YouTube that comes top**.

▪ Interestingly, **Facebook-owned Instagram is the second "coolest" network for teens**, giving more vindication for Facebook's decision to purchase it. Zuckerberg and co. still have a challenge to overcome in the crucial messaging space, however, where **Snapchat is notably ahead of either WhatsApp or Facebook Messenger**. Tumblr also performs much better among teens than it does among the general online population.

PERCEPTIONS OF SOCIAL NETWORKS/APPS

% who say the following networks/apps are the "coolest"
(note: respondents could select one name only)



Question: Which of the following social networks/apps is the coolest? // **Source:** GlobalWebIndex Q1 2015 // **Base:** 8,010 UK and 7,890 US Internet Users aged 16-64



Want to explore this data in PRO Platform? Click here: [Social Media > Perceptions of Social Networks/Apps > Coolest Social Network/App](#)

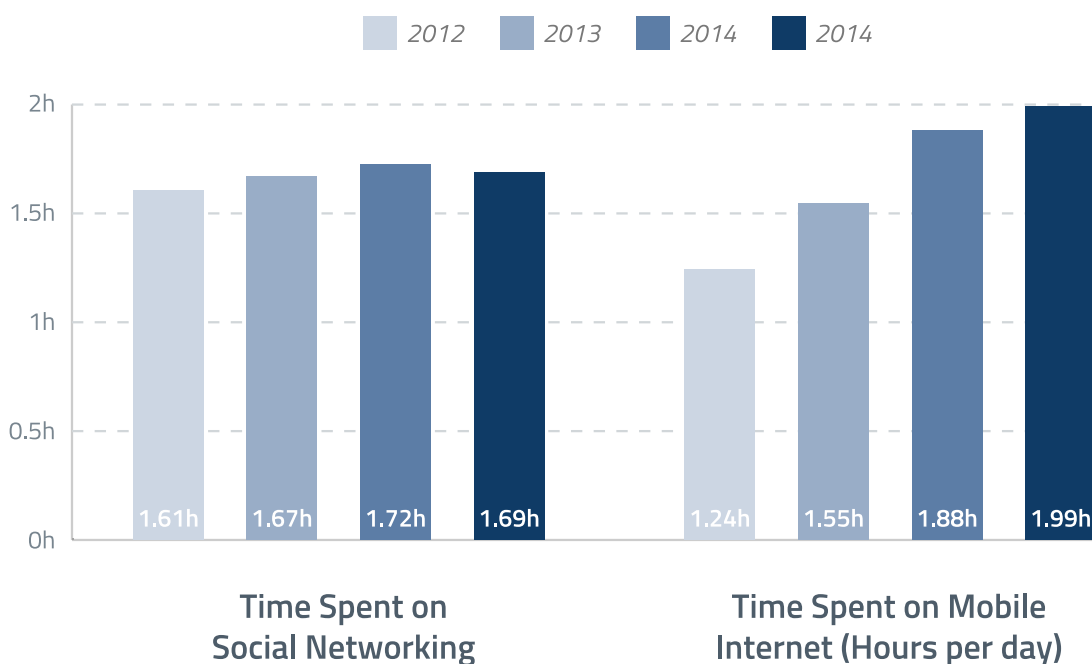


1 IN EVERY 4 MINUTES SPENT ON THE INTERNET IS ON A SOCIAL NETWORK

- Social networking now accounts for **more than a quarter (28%)** of the time we spend on the internet each day.
- **The rising importance of the mobile internet is clear here.** If we look at the average time per day that people are spending on the mobile web, this metric has jumped from 1.24 hours in 2012 to 1.99 hours in 2015.
- Average time spent on networking does however vary extremely strongly between countries. In fast-growth markets, comparatively young, urban and affluent internet users are at the forefront of this trend, whereas **the lowest amounts of time are being devoted to networks in a number of mature markets (with Japan, South Korea and Germany posting the shortest times of all).**

TIME SPENT SOCIAL NETWORKING

Daily Average (Hours)



Question: On a typical day, roughly how many hours do you spend on/doing the following? // **Source:** GlobalWebIndex Q1 2015 (averages across all waves of research conducted in each year) // **Base:** Internet Users aged 16-64



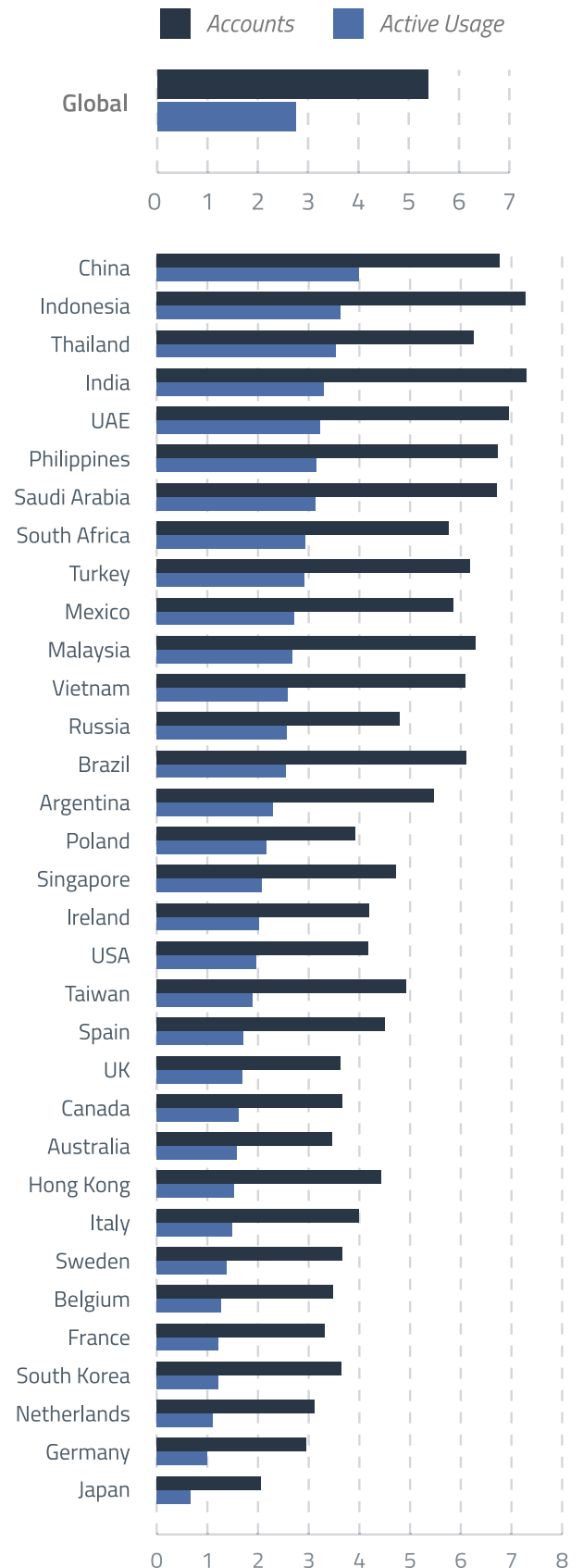
Want to explore this data in PRO Platform? Click here: [Media Consumption > Cross Media Consumption > Time Spent...](#)



AVERAGE PERSON HAS 5+ SOCIAL NETWORKING ACCOUNTS

- Multi-networking is prolific; **on average, people now have accounts on 5.39 social networks and are actively using 2.75 of them.** The impact of this on the Facebook audience is clear to see: whereas the average Facebooker was actively using 2.56 social networks back in 2012, they are now active on 4.15.
- There's huge cross-over between the top networks. Some **93% of Twitter's active users have a Facebook account**, for example, as do 90% on YouTube.
- APAC-based countries lead for this trend – a result of many users in this region being on global networks such as Facebook and Twitter as well as more locally popular ones such as Sina Weibo and Tencent Weibo. Indeed, it's pretty telling that **Chinese internet users are most likely to be actively using the highest number of social networks (4.27)**; many are using VPNs to access restricted global platforms while also engaging with nationally popular sites like Youku, Qzone and RenRen.

AVERAGE NUMBER OF SOCIAL MEDIA ACCOUNTS



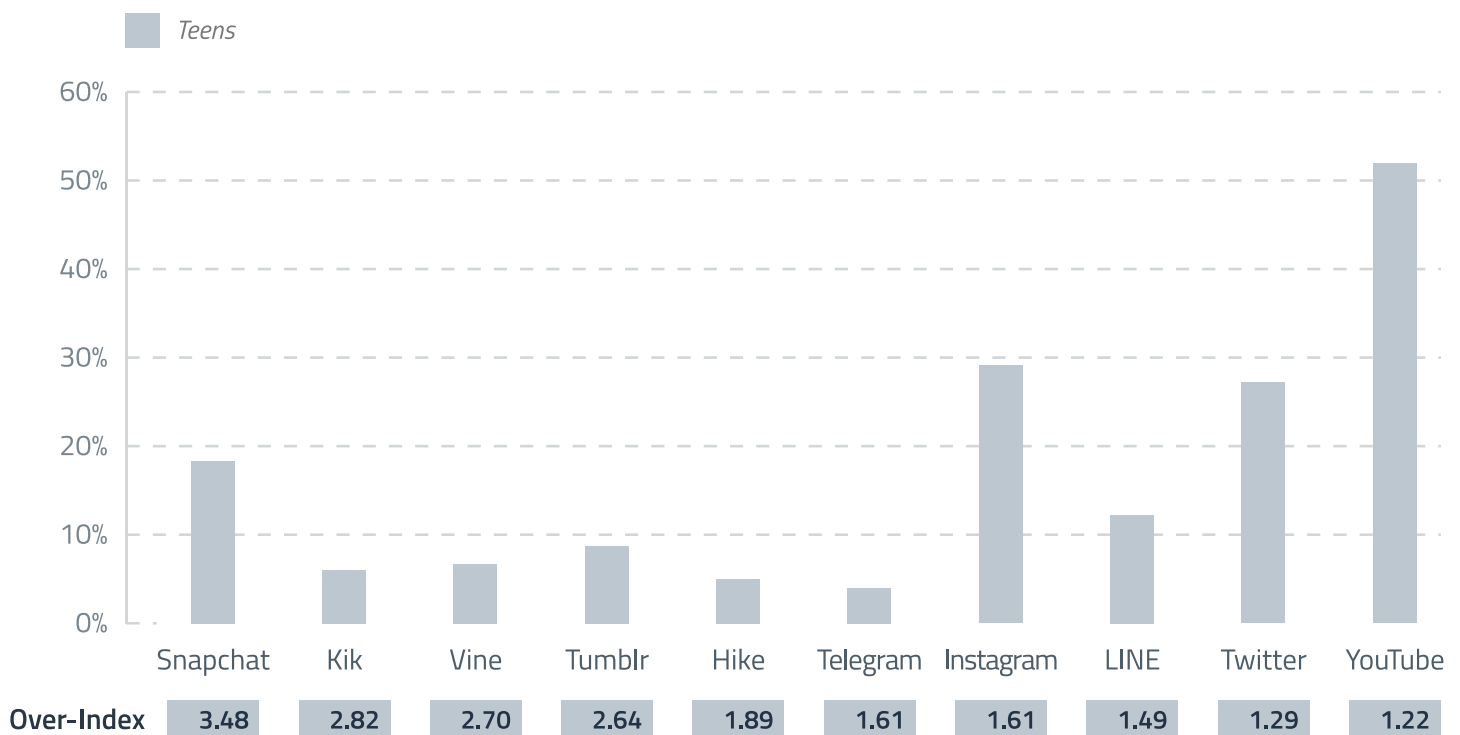
Question: Account: On which of the following services do you have an account? // Active users: Which of the following services have you used or contributed to in the past month using any type of device? // **Source:** GlobalWebIndex Q1 2015 // **Base:** Internet Users aged 16-64

Want to explore this data in PRO Platform? Click here: [Social Media > Social Platforms > Account Ownership/Membership](#)

TEENS ARE 3.5X MORE LIKELY THAN AVERAGE TO BE ON SNAPCHAT

- Across all of the social and messaging apps tracked by GWI, it is for Snapchat where we see 16-19s over-indexing the most strongly. **They are in fact about 3.5x as likely to be using Snapchat as the average internet user.**
- Relatively modest worldwide figures for Snapchat mask some much higher percentages from particular markets, especially in the North America and Europe regions. **More than 40% are now Snapchattin in Ireland, Sweden, Canada, Belgium and the UK**, for example. What's more, Snapchat is more popular than either Facebook Messenger or WhatsApp among American teens.

TEEN USAGE OF SOCIAL AND MESSAGING APPS



Snapchat

	Teens	Over-Index
Ireland	52%	10.63
Sweden	46%	9.37
Belgium	46%	9.29
Canada	41%	8.25
UK	40%	8.01
USA	38%	7.65
France	28%	5.66
Saudi Arabia	26%	5.17
Germany	24%	4.85
Spain	22%	4.46

Question: Which of the following mobile / tablet applications have you used in the past month? (on any device) // **Source:** GlobalWebIndex Q1 2015 (Snapchat by Market figures are Q4 2014-Q1 2015) // **Base:** Internet Users aged 16-64, exc. China

Want to explore this data in PRO Platform? Click here: [Apps > Specific Applications > Specific Applications Used](#)



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