globalwebindex

Fear of Missing Out (FOMO) on Social Media

Examining the demographics, attitudes and digital behaviors of FOMO Networkers

AUDIENCE REPORT 2018

www.globalwebindex.com

Contents

Introduction

GlobalWebIndex Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population. In this report, we place the spotlight on **FOMO Networkers: those who have a 'fear of missing out' on social media.**

This report explores:

- **The Prevalence of FOMO**
- **Profiling FOMO Networkers** – What are some of the defining attributes of this consumer segment?
- **Digital Consumption** – How do FOMO Networkers use the internet differently to the average user?
- **The Purchase Journey** – How do FOMO Networkers discover, research and interact with brands while online?

DEFINING FOMO NETWORKERS

In this report, respondents are categorized as FOMO Networkers if they use social media for any two out of the following three reasons: 'because a lot of my friends are on them', 'to make sure I don't miss out on anything' and 'to stay in touch with what my friends are doing." This is a more focused definition than the standard FOMO Networker category as defined in the platform, which includes respondents who agree with just one of the three. The definition of FOMO Networkers rendered a sample of 24,800 respondents from 40 countries.

Every country surveyed by GlobalWebIndex was represented apart from Ghana, Kenya, Morocco and Nigeria, where respondents answer a mobile version of the survey that does not ask about reasons for social media use.

To re-create this audience, access Audience Builder in our Platform.

Key Insights

A quarter of all global internet users are FOMO Networkers. Since late 2012, the share of people who **spend more than 10 hours online per day has increased from 2.8% to 5.4%.**

FOMO Networkers tend to be **younger**, and are slightly more likely to be **female**, although these generational and gender differences are shrinking. They can be characterized as **technophilic, aspirational, altruistic and status-seeking.** Only a **quarter** fall into the image-conscious category.

The amount of people who reject the notion of FOMO (**Non-FOMOs**) has been **steadily increasing since 2014,** either demonstrating the impact of social media fatigue or the lessening burden of social proof.

Regionally, FOMO is much **more prevalent in EMEA and North America.** Countries where people are more likely to **look to social media for positive human connection tend to have a higher percentage of FOMO Networkers.** This is because social media positively reinforces online consumption and engagement, leading to high levels of FOMO and addiction amongst users.

In **Latin America**, social media is deeply intertwined in the daily lives of consumers than digital consumers elsewhere. Therefore, they **cite fewer social reasons for using social media,** and in turn FOMO Networker prevalence is lower despite regionally spending significantly longer online than the global average.

Fear of Missing Out (FOMO) on Social Media

The Prevalence of FOMO

Audience Report 2018

The Prevalence of FOMO

Being an internet user is synonymous with being a social networker these days. According to GlobalWebIndex data, 98% of digital consumers have at least one social media account and used social media in some form in the last month. Daily time spent on social media is also notably higher than it was a few years ago, with mobiles phones now firmly the primary device for digital consumers looking to access social media.

The increasing importance of the smartphone to social activities has been one of the key drivers behind an important trend in the social space – multi-networking. Internet users are now comfortable maintaining a portfolio of social media accounts, turning to each for activities and to engage with specific social groups, and the anytime-anywhere access that smartphones provide has made it simple to manage this array of social profiles.

However, users' activities are becoming more passive on certain major networks, as engagement with these platforms becomes more frequent but less prolonged, and as the users have become more selective about where they share their personal content. That said, most members of the major platforms do visit on a monthly basis, ensuring that ads and content can be delivered and revenues generated.

A quarter of all global internet users are FOMO Networkers

To provide for social content-hungry networkers, different platforms are providing increasingly abundant forms of social information. These mediums allow easy access to real-time information about the activities, events and conversations happening around the world.

FOMO will drive global Bitcoin breakout: DeVere CEO

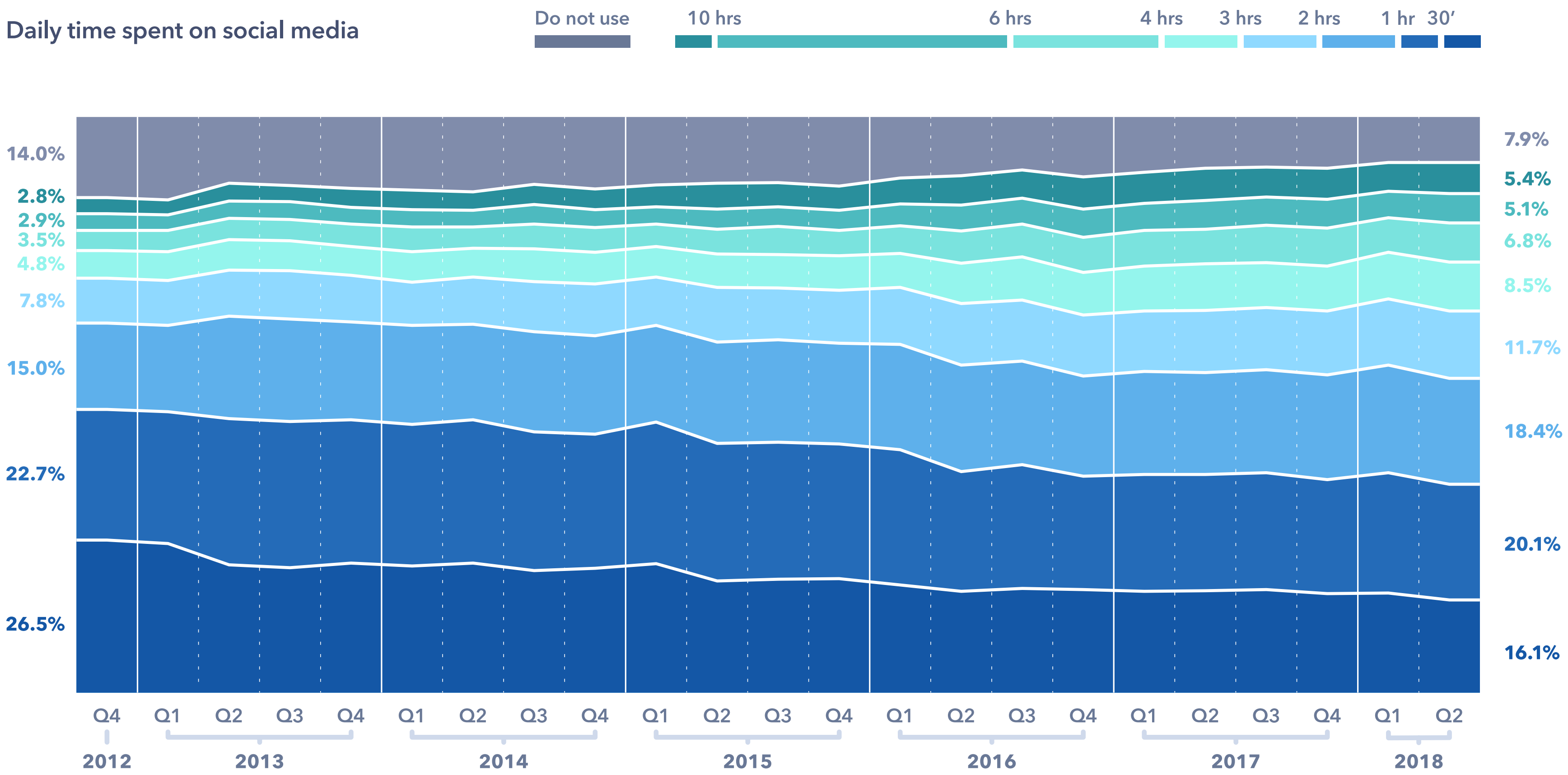
The collective market valuation of all publicly-available crypto assets declined by an incredible 70% in the past nine months. But even amidst this downtrend, adoptions rates have surged, while the development and maturation of crypto-focused infrastructure have also seen their fair share of progress. Even prominent banks like Goldman Sachs, JP Morgan and Citigroup have begun to allocate resources to the development of cryptocurrency services, and hedge funds and traditional banks have both been predicted to enter this market en-masse in the near future. Nigel Green, CEO of financial consultancy deVere Group, believes that Bitcoin is **"on the verge of a true global breakout" that will be entirely driven by FOMO and "unless [institutions] embrace this sector, their competitors could move way out in front."**

The Prevalence of FOMO

The overload of digital updates has produced a phenomenon termed the fear of missing out, popularly known as FOMO. Defined as a pervasive anxiety that others might be having rewarding experiences from which one is absent, FOMO produces a need to stay continually connected with what others are doing. As a social media user category, FOMO Networkers' (high) use of social media is motivated by the fear of missing out on what their friends are doing, saying and experiencing.

Participation in social media is especially attractive for people who fear missing out. Services like Facebook, Twitter, Instagram and Snapchat are tools for seeking human connection and provide the promise of deeper social involvement. Since late 2012, the share of people who spend more than 10 hours online per day has increased from 2.8% to 5.4%. While these tools offer many advantages for the general population, they are a particular convenience for those who grapple with FOMO.

Daily time spent on social media



[1]Przybylski, A. et al. (2013). Motivational, Emotional and Behavioral Correlates of Fear of Missing Out. Computer in Human Behaviour, 29, 1841-1848. doi:10.1016/j.chb.2013.02.014.

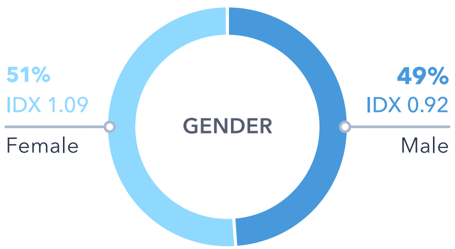
Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** Roughly how many hours do you spend engaging with/connected to social media during a typical day?

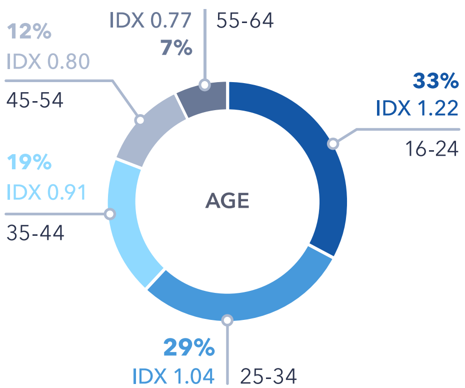
The Prevalence of FOMO

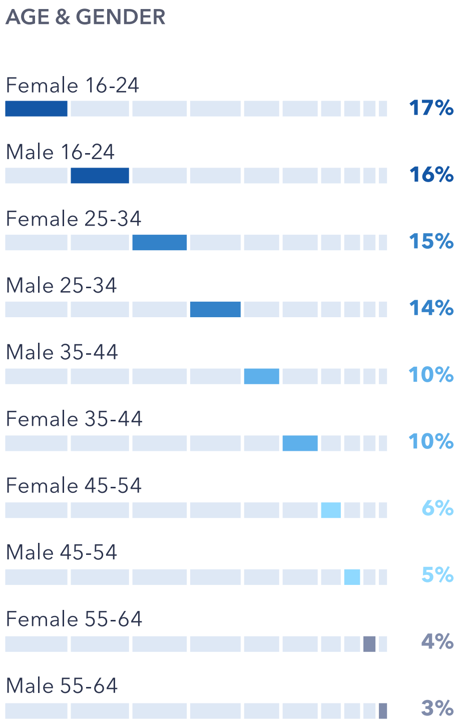
A Generational Phenomenon?

Millennials are defined as anyone born between 1981 and 1996 (ages 22 to 37 in 2018). They have been subjected to more than their share of generational stereotyping: whether it be their impulsive, short-sighted approach to money management or their appetite for smashed avocado. However, it's FOMO that has the honor of defining this generation, in particular younger millennial women. It's also described as a source of increasing vulnerability for many.

FOMO Networkers by...







The FOMO-Millennial Epidemic

Millennials have now moved into their prime spending years and disrupting the way purchases (both physical and experiential) are made – Eventbrite, a global event ticketing company, found that "FOMO drives millennials' experiential appetite: nearly 7 in 10 millennials experience FOMO". This is fueled by the fact these digital natives share their experiences across social media channels as a form of mass communication, value events and memories more than 'stuff', and prioritize social gatherings in their schedule.

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** Please tell us your gender // How old are you?

The Prevalence of FOMO

However, FOMO is increasingly becoming an inter-generational phenomenon that impacts a more diverse range of people. More than a third of all 16-24-year-olds fall into the FOMO Networkers category, the highest of all age groups. Although this figure is a lot lower in the older age groups, it is becoming more common: 12% of 45-54-year-olds and 7% of 55-64-year-olds fit into this category.

This is also true of gender differences between FOMO Networkers; although there are higher percentages for female FOMO Networkers at every age group, males represent a significant proportion of this category as a whole. Male 16-24-year-olds are the second largest group proportion of FOMO Networkers, just behind their female counterparts, but ahead of female 25-34-year-olds. FOMO has therefore become a much more pervasive motivator for social media usage than the stereotype would suggest. It doesn't just affect younger, image-conscious women.

The Increase of Non-FOMO

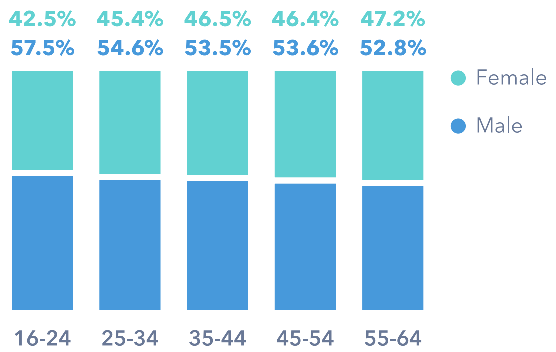
An increasing number of social media users are straying from their participation on social media when they start to feel social media fatigue. This occurs when a user of social media becomes overwhelmed or exhausted by the various overloads of notifications, alerts and reminders through their involvement of different social media platforms.

When users find that their involvement in a social network has become emotionally taxing, they're likely to cut down on their usage, permanently or temporarily. This can be detrimental for businesses and service operators, because fatigue results in withdrawal from service use, which translates into lower profits for these companies.

This report categorizes people who refrain from being constantly connected online as "Non-FOMO" networkers. These are people who do not feel the need to use social media because their friends are on them, nor because they fear that they will miss out on something socially rewarding.

Older generations are more likely to fall into this Non-FOMO category, with 16% of 45-54-year-olds (Index 1.12) and 10% of 55-64-year-olds (Index 1.15) categorized as Non-FOMOs. However, a significant percentage of the younger age groups also fall into this category. For example, the fact that nearly a quarter of 16-24-year-olds are Non-FOMOs reveals the relationship that younger individuals have with social media is complex.

Prevalence of Non-FOMO by age and gender

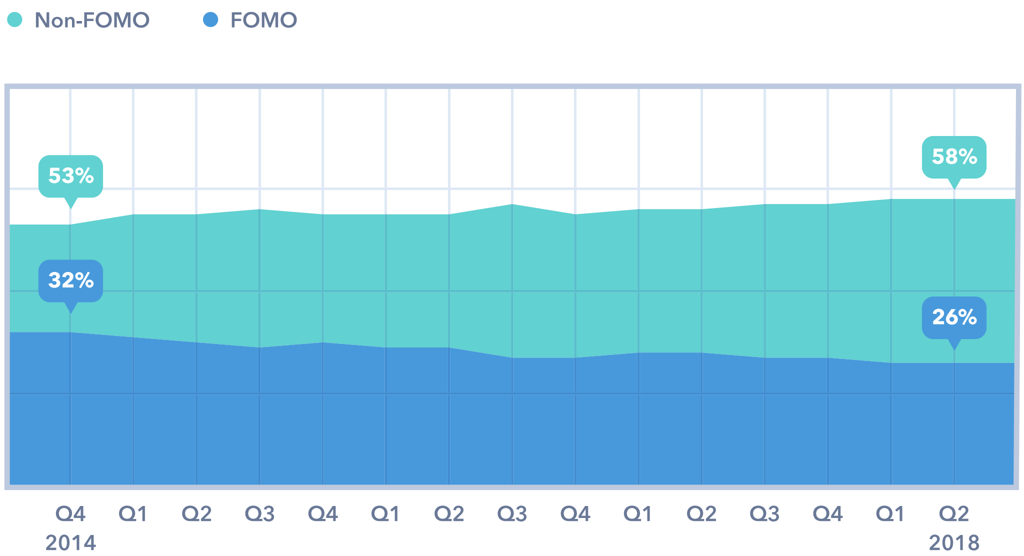


Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** Please tell us your gender // How old are you?

The Prevalence of FOMO

Non-FOMOs have been steadily increasing as a share of internet users (from 53% to 58%) since we began tracking this category towards the end of 2014. Conversely, FOMO Networkers have decreased from 32% to 26%. These results are telling; they demonstrate the decreasing burden of needing one's actions to be accepted and 'liked' by the rest of society, and reveal how individuals are learning to better manage their social media fatigue.

Prevalence of FOMO and Non-FOMO over time



The Rise of Digital Well-Being

One of the big additions at Google's I/O 2018 is 'Digital Wellbeing', a means to stop people staring into their phones all day. The Digital Wellbeing initiative allows users to monitor the amount of time they spend on the phone, as well as in individual apps. Custom timers can be established to remind users to put the phone down (or to stop using certain applications). As the initiative spreads, Google devices will include features that allow users to customize their experience and combat technological addiction.

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** Audience Size

The Prevalence of FOMO

Latin Americans have proved to be early adopters and heavy users of social media – they spend significantly longer online both on mobile (4hr10m vs 3hr10m) and on social media (3hr27m vs 2hr15m) than the global average. Compared to the global audience, they also have more social media accounts, follow more brands on social, and are more likely to have used or visited the top social media networks. **Social media is more intertwined in the daily lives of Latin American consumers** than digital consumers elsewhere and has emerged as a more important avenue for reaching these consumers than direct email marketing. And yet, despite these statistics indicating how reliant Latin Americans are on social media, only 22% (Index 0.86) are categorized as FOMO Networkers, dropping by 4% since 2015. In fact, there are three regions -- Latin America, Europe and Asia Pacific – that under-index for FOMO Networkers. In comparison, North America and the Middle East and Africa both over-index for this category. Why?

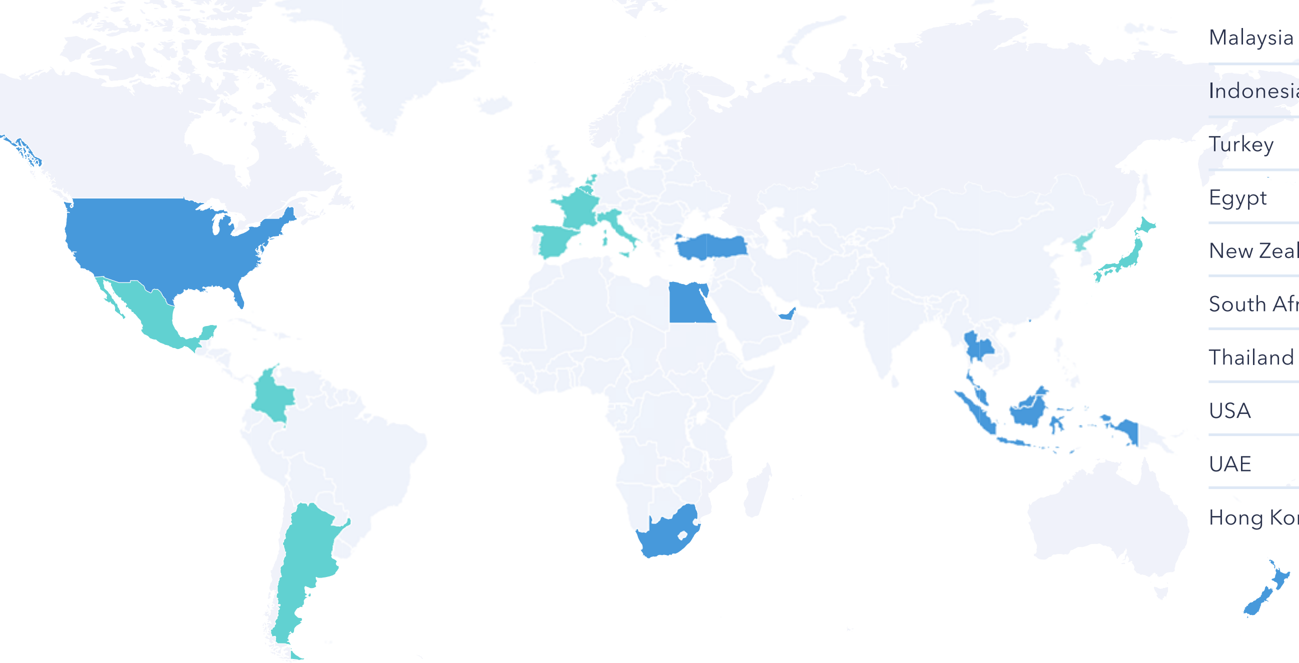
Taking Latin America as an example, individuals there are much more likely to cite non-social reasons for using social media. Staying up-to-date with news and current affairs, filling up spare time and finding funny or entertaining content were all more important reasons for using social media than to share photos or videos with others. Only a third (35%, Index 0.90) of Latin Americans say that staying in touch with what their friends are doing is a main motivator for their use of social media. **This suggests that because social media is so heavily integrated into their everyday life, it is easier to disconnect the social aspect of and to use it for more personal reasons.**

Why a country has a particularly high or low prevalence of FOMO Networkers (or Non-FOMOs) is not easily attributable to any one variable. However, there are a couple of factors that can help explain some of the difference between countries. Countries with a high percentage of 16-24-year-olds generally index higher for FOMO Networkers, although this offers a limited explanation.

The attitudes that a population have towards social media, and technology as a whole, can better explain the differences between high-FOMO and low-FOMO countries. For example, over half the FOMO between-country variance can be explained by how many respondents agreed with the statement 'the internet makes me closer to people'. This suggests that in countries where social media is used predominantly for human connection, as opposed to educational or entertainment purposes, FOMO follows.

The Prevalence of FOMO

FOMO dominates in EMEA and North America



Top 10 Countries

Malaysia	41%	Japan	79%
Indonesia	39%	Netherlands	77%
Turkey	38%	Italy	74%
Egypt	36%	Belgium	72%
New Zealand	36%	South Korea	71%
South Africa	35%	France	70%
Thailand	34%	Spain	69%
USA	33%	Colombia	68%
UAE	33%	Mexico	67%
Hong Kong	32%	Argentina	64%

ASIA PACIFIC

0.97 25%
0.98 57%

39% 37% 36%

EUROPE

0.94 24%
1.08 63%

44% 42% 39%

LATIN AMERICA

0.86 22%
1.07 62%

52% 50% 50%

MIDDLE EAST & AFRICA

1.29 33%
0.91 53%

49% 48% 44%

NORTH AMERICA

1.28 33%
0.95 55%

53% 38% 37%

KEY

- FOMO
- Non-FOMO

0.00 00%
IDX

SOCIAL MEDIA MOTIVATIONS

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

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** World regions (this data is auto-generated based on country) // What are your main reasons for using social media? // Current country of residence

Fear of Missing Out (FOMO) on Social Media

Profiling FOMO Networkers

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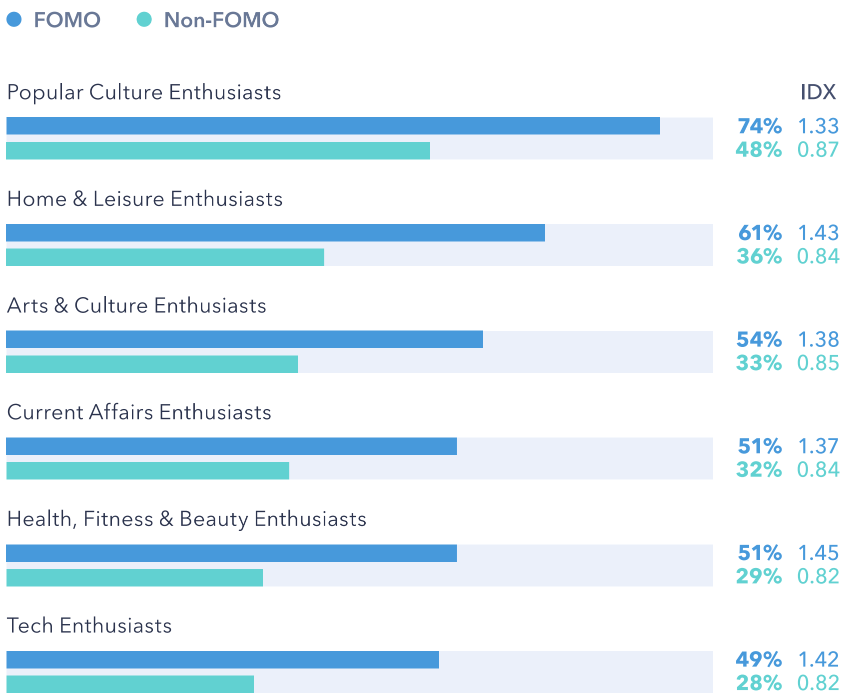
Profiling FOMO Networkers

FOMO Networkers are (very) enthusiastic



FOMO Networkers tend to have wide and varied interests, over-indexing on all personal interest categorizations. They're popular culture enthusiasts across all generations and world regions. Even segmenting by gender, there are only slight differences: popular culture still holds the largest audience percentage for both genders, but male networkers over-index highest as tech and current affairs enthusiasts and female networkers over-index highest for health, fitness and beauty, and home and leisure enthusiasts.

Note: Since Q2 2017 this segmentation is not answered by respondents directly; it is auto-generated based on their responses to the Personal Interests question (q25).

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64

Profiling FOMO Networkers

People whose social media usage is motivated by a fear of missing out have a distinct attitudinal profile. These individuals are 50% more likely than the general population to be technophiles, a group that are defined by their need to be connected online. Over 70% of this group agree that the internet makes them feel closer to people, and 65% say that it is critical for them to be contactable at all times. This group have become so accustomed to being permanently and instantly connected online that feelings of insecurity and anxiousness can arise if they are without their phones. Having a FOMO attitude towards social media can therefore permeate one's relationship to devices and technology in general.

As well as technophilic, FOMO Networkers fall into aspirational (47%, Index 1.29), altruistic (46%, Index 1.20) and status-seeking (42%, Index 1.16) categorizations. This is a group who are constantly made aware of other's achievements and highlights through social media, and therefore it is perhaps unsurprising that they agree it's important to strive to challenge and push themselves to live their best life (77%, Index 1.15), and to feel respected by their peers (80%, Index 1.16). Individuals on social media often showcase a biased view of their lives by only sharing their most impressive successes, or their life's 'highlights'. Although this can result in feelings of lack of self-worth and anxiety, FOMO Networkers have a much more positive outlook towards technology and social media compared to the average consumer. They appear to be able to mitigate the negative emotional effects of social media, and instead use others' successes to motivate them to come across equally as successful.

In comparison, Non-FOMOs' attitudinal profile mirrors the global average quite closely – they under-index as technophiles (20%, Index 0.82) and aspirational (32%, Index 0.87), but do not over-index to a significant degree for any attitudinal characteristic. A significant share of Non-FOMOs agree that technology makes life more complicated (33%, Index 1.03) and that new technology and computers are confusing (24%, Index 1.10). Almost half are unconcerned to what is 'in' and popular right now (47%, Index 1.02), but this could be the cause or the effect of not being constantly connected online.

FOMO Networkers: technophilic, aspirational, altruistic status-seekers

	FOMO	IDX	Non-FOMO	IDX
Privacy Conscious	64%	1.05	59%	0.97
Aspirational	**47%**	1.29	32%	0.87
Altruist	**46%**	1.20	35%	0.92
Status Seeker	42%	1.16	33%	0.92
Technophile	**37%**	1.50	**20%**	0.82
Informed	31%	1.15	26%	0.95
Image Conscious	**25%**	1.26	18%	0.91
Cosmopolitan	23%	1.17	18%	0.93
Economical	16%	1.05	15%	1.02
Spontaneous	8%	0.98	9%	1.02

Note: This data is auto-generated based on responses to the Attitudinal Statements

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64

Fear of Missing Out (FOMO) on Social Media

Digital Behavior

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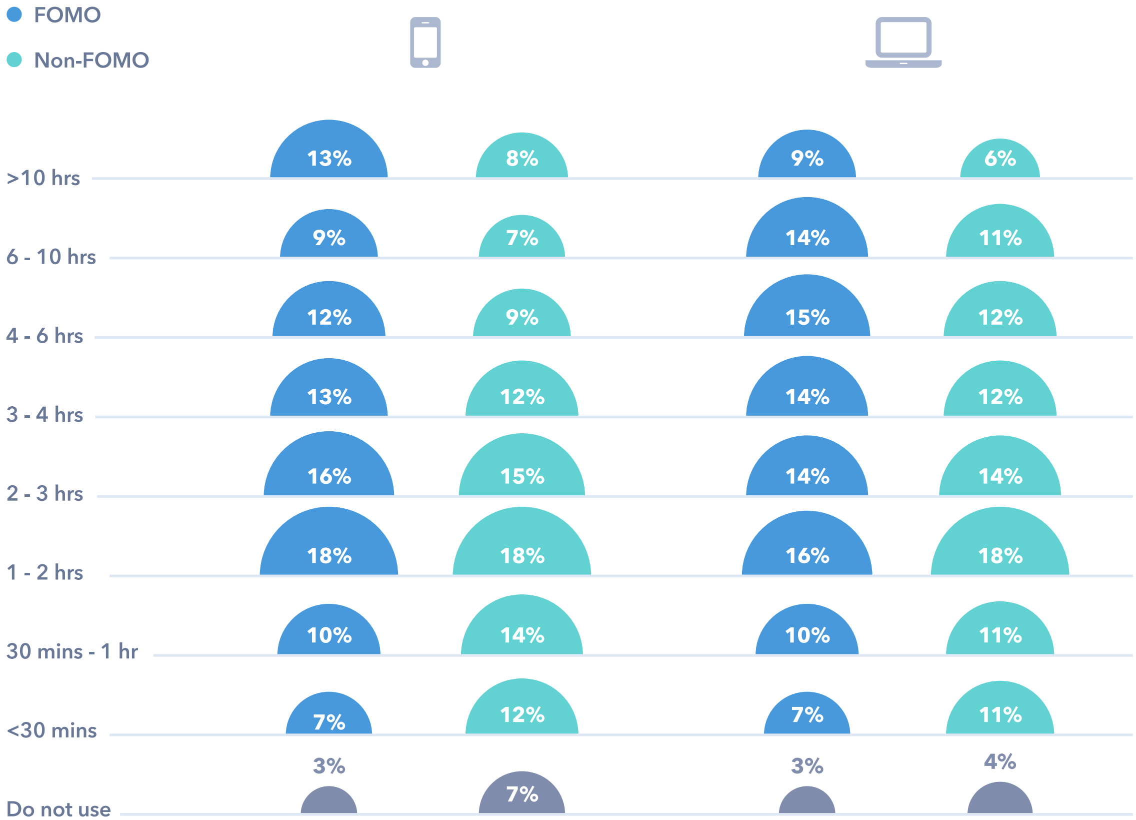
Digital Behavior

78% (Index 1.33) of FOMO Networkers can be categorized as Followers: users who follow brands they like or are thinking of buying from on social media. That does not mean that they are a passive group who just follow and listen; they also over-index as Sharers (51%, Index 1.28) and Commenters (68%, Index 1.14). These networkers don't only enjoy sharing other people's content, but also their own opinions. They aren't afraid of putting themselves out there and actively engage with what they see on social media.

These customer interactions are a crucial marketing strategy in getting content viral, and so this is a valuable group to market to.

FOMO and Non-FOMO average time spent online



FOMO and Non-FOMO digital behavior segmentations

FOMO Non-FOMO

	FOMO	IDX	Non-FOMO	IDX
Followers	78%	1.33	50%	0.85
Sharers	51%	1.28	35%	0.87
Commenters	68%	1.14	55%	0.92
Creators	90%	1.13	75%	0.93

FOMO Networkers are enthusiastic content interactors

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** Roughly how many hours do you spend online on a mobile during a typical day? // This data is auto-generated based on responses to the Online Activities questions

Digital Behavior

Top 5 FOMO internet usage motivations

Stay in touch with friends	57%
Stay up-to-date on news/events	55%
Research how to do things	55%
Education	52%
Research/find products to buy	50%

Top 5 social media motivations

To stay in touch with what my friends are doing	91%
To stay up-to-date with news and current events	63%
To find funny or entertaining content	63%
To fill up spare time	62%
To share photos or videos with others	60%

In defining FOMO Networkers, ‘staying in touch with friends’ was one of the inclusion criteria. It turns out to be the their most common motivator for both using the internet, and more specifically using social media. Over 50% of this group think it’s very important to use the internet to stay in touch with friends, research how to do things, and find new products to buy.

FOMO networkers are more socially engaged than the average. Staying in touch with friends and finding entertaining content are defining characteristics, but this group also over-indexes for reasons such as networking with other people and researching products to buy. With over 81% of FOMO Networkers agreeing that they try to find the best deals for products they want to buy, this is a subset of people who are much more likely to combine social and non-social aspects in their internet and social media use.

FOMO Networkers are not exclusively social on social

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** How important are these reasons for you using the internet? // What are your main reasons for using social media?

Digital Behavior

Compared to the typical social media user, FOMO Networkers are roughly **twice** as likely to:

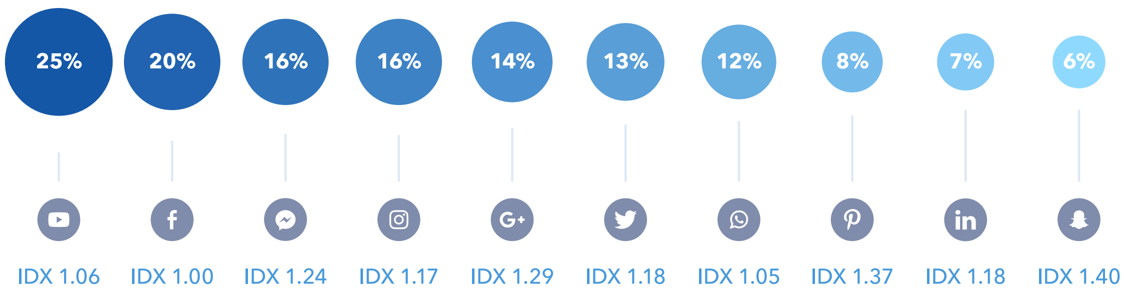
- read or click on trending topics, or start following a new product or brand on **Facebook**
- click on a sponsored post, or swipe up on a user/brand's story to see more on **Instagram**
- to view 'Discover' content from providers like Daily Mail, CNN etc. on **Snapchat**
- to visit a product, brand or company's twitter feed on **Twitter**

FOMO Networkers are much more likely to interact with platform-specific brand content

Highest indexing mobile activities

		IDX
Used a music-streaming service	55%	1.32
Watched a vlog	40%	1.29
Used an online encyclopedia such as Wikipedia	51%	1.28
Uploaded/shared a video	57%	1.28
Used an app/website to order hot/take-away food for delivery (Since Q2 2018)	45%	1.27
Uploaded/shared a photo	73%	1.26

Top 10 Social Platforms (Daily Usage)



Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** In the past month, which of the following things have you done on the internet via any device? // How frequently do you visit/ use these social platforms/ services?

Fear of Missing Out (FOMO) on Social Media

The Purchase Journey

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Brand Discovery

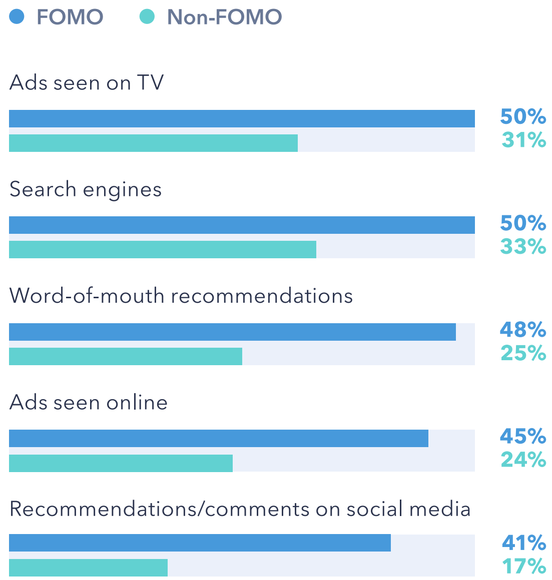
FOMO Networkers may be constantly tuned in to all forms of media, but traditional channels are still the most impactful during the discovery phase of the journey to purchase. **TV ads and search engines are the top two ways that FOMO Networkers come across new brands, products or services** (both at 50%), with word-of-mouth recommendations (48%) completing the top three. Although FOMO networkers feel strong personal motivations to use social media, this orientation hasn't shifted them away from traditional sources of brand discovery. Commerce and social aren't yet integrated to the point that higher social media use necessarily supplements traditional channels. Some social content formats do over-perform, though.

For the youngest FOMO Networkers, online ads reign over TV ads for brand discovery

Despite online channels sitting behind TV among the average FOMO Networker, the difference is reducing. In fact, if we look at those aged 16-24s, online ads now place just ahead of TV ads as a method of discovery - falling in line with wider global age-based trends.

Some discovery routes resonate strongly with the FOMO networker audience compared to the online average, including vlogs, endorsements by celebrities or posts from expert bloggers. This really does demonstrate the potential success for those marketers who choose to integrate influencers into their strategies across the right social channels. Importantly, though, "word-of-mouth recommendations by friends and family" (44%) are still chosen for brand discovery by more 16-24-year-old FOMO networkers than "recommendations on social media" (40%).

Most popular sources for brand discovery



Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** In which of the following ways are you most likely to find out about new brands, products, or services?

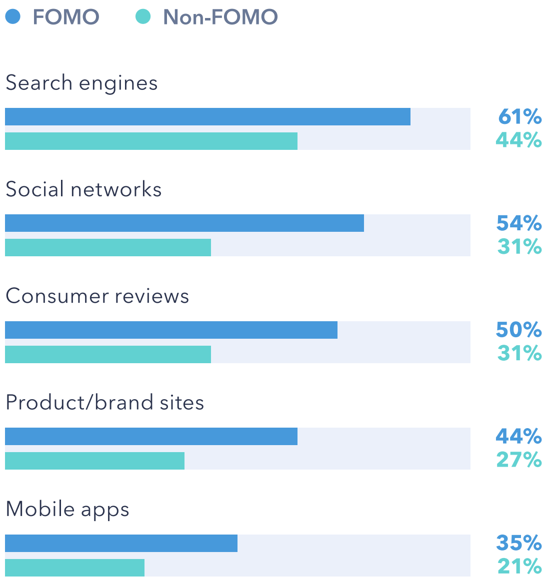
Brand Research

We're seeing a disconnect between the dominant position of social media in FOMO networkers' online lives, and the relatively more traditional purchase journeys they take. FOMO Networkers are more eager than average to do online research before purchases, and as with most audiences, **search engines remain top for FOMO Networkers wanting to research a brand online (61%).**

This disconnect might simply be a delayed effect. **Social networks are catching up, increasing from 47% to 54% in the past 3 years,** followed by consumer reviews as FOMO Networkers third choice for brand research. These three sources are top across all ages and regions - apart from in Latin America where social media is particularly impactful and leads by more than 10 percentage-points.

Beyond this, other channels like a brand's website, mobile apps and price comparison websites all remain important in this journey phase for a good 35% of this audience. And like in the discovery phase, FOMO Networkers are over 50% more likely to say they turn to blogs and vlogs on products or brands when looking for more information.

Top 5 sources for brand research



Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?

Online Purchase Drivers

FOMO Networkers are enthusiastic online shoppers. **81% made a purchase online last month, with mobile (65%) the primary device, followed by laptop (49%).**

FOMO Networkers are ahead of the average digital consumer for purchasing all types of online content, but in particular for making in-app purchases (15%, Index 1.51). They're also 30% more likely to have paid for movie and TV streaming services, which at 30% are also their most widely purchased type of content. (30%, Index 1.30). Music-streaming services are a close second, with 28% adoption (Index 1.24). This is largely a reflection of the relative youth of the audience.

Free delivery (72%, Index 1.22) has the biggest influence whether FOMO Networkers' will ultimately complete an online purchase; it enjoys a 12 percentage-point lead over all other options. Coupons and discounts (60%, Index 1.31) and reviews from other customers (51%, Index 1.41) make up the other two spots in the top three. Perhaps surprisingly, only a third of FOMO Networkers cite endorsements on social media as a purchase driver (33%, Index 1.60), which translates as the eighth most important reason this audience will make a purchase.

Having the option to use a 'buy' button on a social network is last in this list, with only 16% of FOMO Networkers citing this as a purchase driver. This is a low proportion, but it's nevertheless almost 50% higher than internet users at large (Index 1.48). Social commerce goes beyond 'buy' buttons, but this does hint that this group have the potential to be early adopters if and when social commerce is properly introduced to major social platforms.

Top 5 purchase drivers

	FOMO	Non-FOMO
Free delivery	72%	54%
Coupons and discounts	60%	40%
Reviews from other customers	51%	30%
Easy returns policy	49%	29%
Loyalty points	40%	26%

TREND IN ACTION

Instagram moving further into e-commerce with a stand-alone shopping app

Instagram

According to a report from The Verge, Instagram is currently working on an e-commerce shopping app that enables users to browse and purchase products directly from merchants. It's been more than a year since Instagram opened up shoppable organic posts to apparel, jewelry and beauty brands. Since then, they have offered retailers the option to add an e-commerce element within their Stories on the app, expanded its Collection ads for Stories to all brands, and has begun offering booking and payment features for businesses on the app.

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** When shopping online, which of these features would most increase your likelihood of buying a product?

Brand Advocacy

As with any brand who want to maintain their reputation, ensuring that consumers speak positively about their experiences is hugely important – both offline and online. For FOMO Networkers, high-quality products (62%) are most likely to encourage brand advocacy, followed closely by rewards (56%).

FOMO Networkers are a good group to target, as they are much more likely than the average social media user to advocate for their favorite brand across all options. They index highest for when something is relevant to their friends' interests (16%, Index 1.43).

Understanding that this group care almost as much about what would interest their friends as what interest themselves is key to securing brand advocates. And with two-thirds saying that once they find a brand they like they tend to stick to it, enlisting these brand advocates can be a quick win with a long-term gain.

Top 5 FOMO internet usage motivations

High-quality products	62%	44%
Rewards (e.g. discounts, free gifts, etc)	56%	39%
Love for the brand	46%	28%
When something is relevant to my own interests	44%	28%
When I've received great customer service	44%	28%

Source: GlobalWebIndex Q2 2018 **Base:** 111,899 internet users aged 16-64 **Question:** What would most motivate you to promote your favorite brand online?

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 400,000 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 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 GlobalWebIndex'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 Q2 2018 wave of research across 40 countries, with a global sample of 111,899 respondents. Among this sample, there were 24,800 respondents from 40 countries.

	TOTAL	FOMO Networkers
Argentina	1581	219
Australia	2291	598
Austria	1326	264
Belgium	1301	168
Brazil	2330	454
Canada	2288	609
China	15142	3304
Colombia	1301	191
Denmark	1334	275
Egypt	1759	455
France	3329	527
Germany	2906	526
Hong Kong	1787	530
India	4063	1102
Indonesia	1785	490
Ireland	1250	310
Italy	2836	437
Japan	1791	114
Malaysia	1556	415
Mexico	2602	368

	TOTAL	FOMO Networkers
Netherlands	1312	125
New Zealand	1288	371
Philippines	1561	349
Poland	1833	396
Portugal	1310	195
Russia	2296	527
Saudi Arabia	1256	191
Singapore	2517	653
South Africa	1527	358
South Korea	1280	126
Spain	2849	422
Sweden	1292	318
Switzerland	1265	209
Taiwan	1819	499
Thailand	1533	362
Turkey	1576	407
UAE	1781	422
UK	7810	2206
USA	16179	4989
Vietnam	1573	315

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 2018. 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 2018 based on 2016 ITU data

Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%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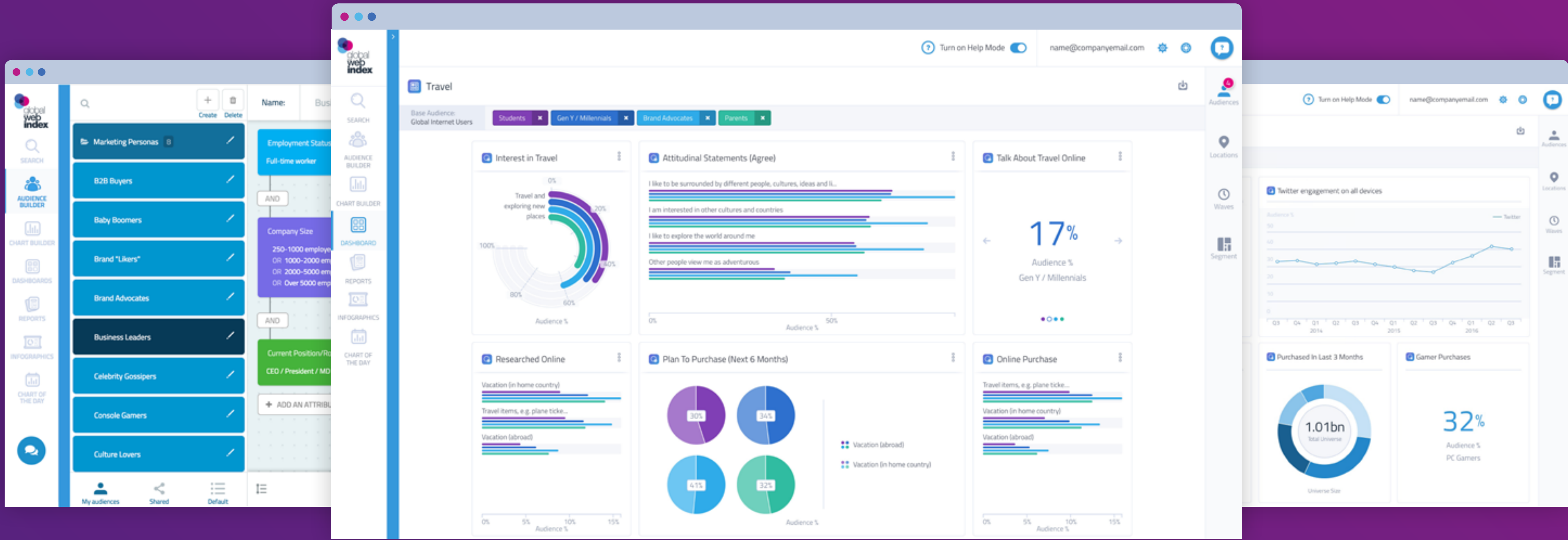

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