globalwebindex

Social

GlobalWebIndex's **flagship report** on the latest trends in social media

Flagship Report 2018

www.globalwebindex.com

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Introduction

GlobalWebIndex Social Media Flagship provides the most important insights on the world of social media, from the very latest figures for social media engagement to the key trends within the social space and a comprehensive view of which social platforms are most popular.

Among others, this report covers the following topics in detail:

- How much time per day are digital consumers devoting to social media?
- How are the behaviors of social media users changing?
- Which social platforms are most popular (among the total online population and key audiences)?
- How are consumers using social media to engage with brands?
- How are social media services evolving as content and commerce platforms?

Definitions of Engagement

GlobalWebIndex defines consumer engagement with social platforms as:

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 platform's website or app via any device.

China

China is excluded from most of the global charts featured in this report which track specific/ named platforms. This is due to the unique nature of the Chinese social media industry, which maintains its own diverse ecosystem of homegrown social platforms and has official restrictions on many global social services. For detail on social media usage in China, see our special China section of this report and consult our China Market Report.

Key Insights

A saturated market

98% of digital consumers are social media users, and adoption is high even among 55-64s (94%). An average of 2 hours 22 minutes per day is spent on social networks and messaging, although this figure has started to decrease in specific markets.

Not as social as you'd think

As social networks have evolved into multi-media platforms, digital consumers are now as likely to use them for keeping up with the news as to stay in touch with friends. 16-24 year olds show slightly different preferences; their most cited motivations for using social media are to fill up spare time and find funny or entertaining content.

Social media integral for product research

22% of digital consumers have liked or followed a brand on a social network in the past month, and more than 4 in 10 use social networks to research new brands or products, making it the second-most important channel of all. Among 16-24 year olds, social media comes top, having overtaken search engines towards the end of 2017.

Close competition between top messaging services

While Facebook Messenger has a 5-point lead for membership, WhatsApp leads by 5 percentage points in terms of visitors rates. Snapchat comes in on a distant third, though this service does see much higher figures in North America, especially among the Generation Z.

Multi-networking slows down

People online have an average of 8.5 social media accounts, and tend to use each platform for different purposes. That said, over the past year we have seen an appreciable slowing in the number of accounts held per internet user, across generations.

Live video an essential asset

28% of users of four major social platforms outside of China engage with live streams each month on any one of these services. Facebook takes the lion's share, with the largest user base as well as the highest engagement rates with live video.

Facebook and YouTube dominate

Facebook is still the dominant social platform in terms of membership, but falls behind YouTube in terms of weekly visitors. YouTube has fewer registered members, but has visitor rates that is 7 percentage points higher than its membership. It's the only major social service to find itself in this situation, and shows that significant numbers of its visitors are either not logged into their accounts, or not even members in the first place.

Social

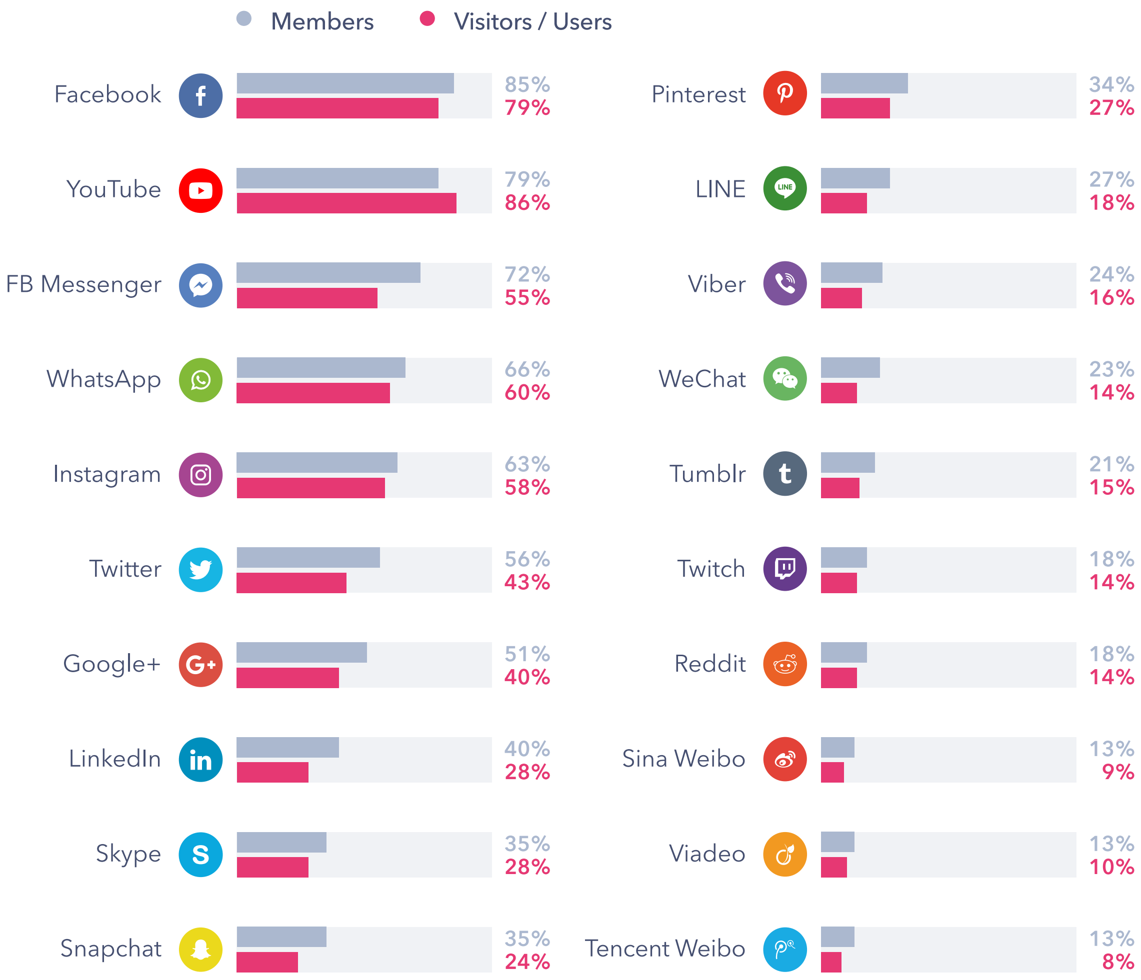
Social Media Landscape

How does the global social media landscape look like, and how does this differ between regions?

Most Popular Social Services

TOP 20 SOCIAL PLATFORMS

% outside of China who are members or visitors/users of the following services



Globally, **Facebook remains the dominant social platform by membership**. Outside of China, 85% of internet users say they have a Facebook account. This shows that Facebook is managing to retain members in the midst of it's stock being down nearly 36% since July, and in spite of increased competition from newer networks and messaging apps.

YouTube is a strong second, with **Facebook Messenger** then having a decent lead within the third tier of services that includes **WhatsApp, Instagram and Twitter**. However, many platforms which post lower figures in this chart are nonetheless popular among particular demographics or in certain markets (names such as Snapchat, LINE, Viber and WeChat).

Question: On which of the following services do you have an account? // Which of the following sites/applications have you visited in the past month via your PC/Laptop, Mobile or Tablet?
Source: GlobalWebIndex Q3 2018 **Base:** 98,011 Internet users aged 16-64 from outside China

Most Popular Social Services

If we narrow our focus to people who have visited or used the service in the last month, YouTube rises to top position. It's the only major social service to have more people visiting than those who are a member, revealing that **significant numbers of its visitors are either not logged into their accounts, or are not even members in the first place**.

For messaging services, it's a close race between Facebook Messenger and WhatsApp. While Facebook Messenger has a 5 point lead in membership rates – 72% to 66% – WhatsApp has more monthly users. Snapchat comes in at a distant third, though this service does see much higher figures in North America, especially among Generation Z.

The strength of Facebook's wider eco-system of services is clear once when we examine usage frequency across the major networks. **Facebook, YouTube and WhatsApp occupy the top three spots for at least daily visitation/usage**, underlining how Facebook remains the default hub for traditional networking activities, YouTube for entertainment and WhatsApp for simple peer-to-peer messaging. WhatsApp generally outperforms Facebook Messenger across world regions and age groups, and currently enjoys a 15 point lead over Facebook Messenger judging by users who use the service more than once per day. Instagram can boast a more engaged user-base than Twitter; the proportion who those who use Instagram at least daily (43%) is 17 percentage points higher than Twitter (26%), and this gap is slowly widening.

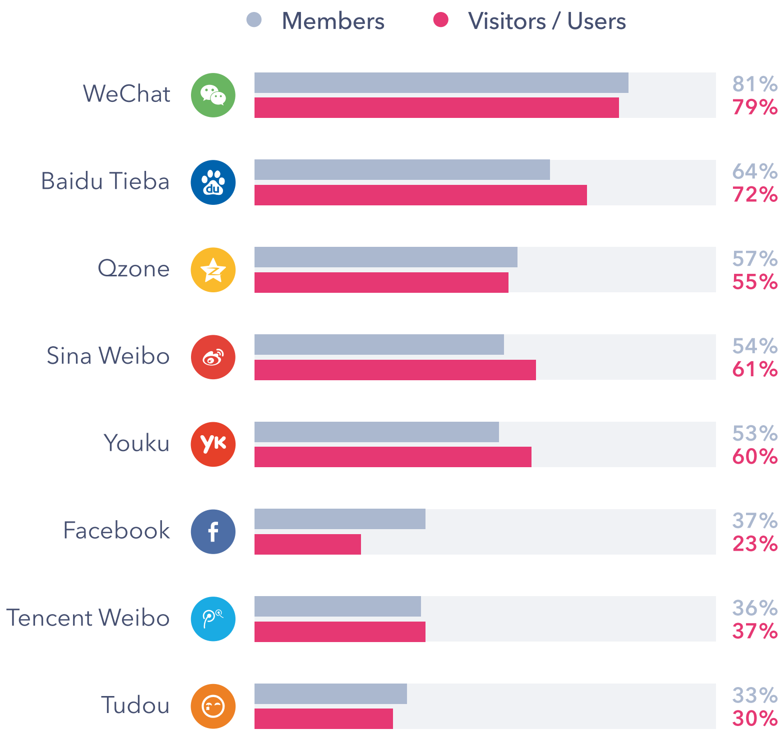
By age, it's expected that younger age groups are heavier social media users, while older demographics have a narrower portfolio of social accounts. Facebook and YouTube can boast a cross-age appeal that the other social platforms are unable to mirror, with nearly 7 in 10 internet users of all age groups visiting or using these platforms each month. However, while YouTube has kept consistent visitor rates among 16-24s, this age group seem to slowly be disengaging from Facebook. While approximately 85% of this age group were visiting/using Facebook at least on a monthly basis in Q1 2016, this has gradually dropped to 79% in Q3 2018.

Usage of the other social platforms tends to drop off among older age groups. To take Instagram as an example, 16-24s are over four times as likely to be using this as 55-64s. It's a similar story for Twitter and Snapchat, where 16-24s hold a 15 point and 19-point lead, respectively.

The Social Media Landscape in China

TOP SOCIAL PLATFORMS IN CHINA

% in China who are members or visitors/users of the following services



In a market where the most popular social platforms globally are officially restricted, homegrown networks have flourished in China. **WeChat dominates: 81% of online adults have an account, and 79% use the app each month.** WeChat's broad functionalities, which reach far beyond that of a simple messaging app, have ensured it a central role in the digital activities of many Chinese internet users, and offers a clear example to other services of how social media, commerce and entertainment can merge.

WeChat dominates the social media landscape in China

Baidu Tieba and Qzone also perform strongly, though they're still about 20 points behind WeChat in membership. That said, Baidu Tieba's visitor number rates stand out; they eclipse their membership rates and are only 7 percentage points behind WeChat. As with YouTube, video-site Youku sees notably higher figures for visitors than members.

Question: On which of the following services do you have an account? // Which of the following sites/ applications have you visited in the past month via your PC/Laptop, Mobile or Tablet? **Source:** GlobalWebIndex Q3 2018 **Base:** 15,921 Chinese Internet users aged 16-64

Social Media Landscape Market Insights

	Facebook	YouTube	WhatsApp	FB Messenger	Instagram	Twitter	Snapchat
Argentina	90%	93%	62%	91%	67%	44%	44%
Australia	80%	79%	64%	28%	45%	25%	25%
Austria	73%	85%	50%	82%	42%	21%	21%
Belgium	80%	81%	63%	55%	44%	27%	27%
Brazil	90%	94%	67%	89%	71%	43%	43%
Canada	78%	83%	60%	26%	48%	36%	36%
Colombia	93%	96%	75%	90%	73%	60%	60%
Denmark	82%	79%	66%	18%	46%	23%	23%
Egypt	88%	82%	68%	77%	63%	48%	48%
France	75%	78%	53%	31%	37%	28%	28%
Germany	61%	75%	37%	75%	34%	20%	20%
Ghana	79%	55%	49%	88%	47%	27%	27%
Hong Kong	83%	82%	49%	81%	58%	27%	27%
India	89%	93%	63%	81%	70%	57%	57%
Indonesia	80%	88%	47%	84%	78%	51%	51%
Ireland	77%	83%	63%	65%	52%	42%	42%
Italy	80%	86%	52%	84%	55%	31%	31%
Japan	37%	75%	12%	1%	33%	49%	49%
Kenya	81%	63%	44%	80%	46%	32%	32%
Malaysia	91%	92%	65%	90%	70%	44%	44%
Mexico	93%	95%	75%	88%	65%	58%	58%
Morocco	73%	62%	43%	79%	45%	18%	18%
Netherlands	74%	78%	48%	82%	43%	27%	27%
New Zealand	84%	85%	70%	29%	48%	23%	23%
Nigeria	81%	55%	54%	85%	56%	30%	30%
Philippines	96%	96%	90%	28%	65%	56%	56%
Poland	84%	89%	64%	32%	42%	29%	29%
Portugal	89%	90%	71%	62%	62%	33%	33%
Russia	40%	85%	14%	61%	48%	19%	19%
Saudi Arabia	60%	71%	35%	70%	61%	57%	57%
Singapore	82%	86%	54%	86%	59%	33%	33%
South Africa	81%	84%	57%	91%	54%	42%	42%
South Korea	59%	79%	24%	7%	46%	31%	31%
Spain	80%	87%	42%	85%	53%	48%	48%
Sweden	81%	85%	65%	26%	64%	28%	28%
Switzerland	66%	80%	45%	78%	44%	24%	24%
Taiwan	87%	90%	53%	20%	50%	25%	25%
Thailand	93%	90%	74%	26%	66%	52%	52%
Turkey	80%	90%	54%	81%	82%	56%	56%
UAE	81%	81%	63%	81%	61%	49%	49%
UK	78%	80%	61%	59%	48%	46%	46%
USA	79%	82%	57%	18%	50%	42%	42%
Vietnam	96%	95%	78%	21%	52%	36%	36%

Social

Social Media Behaviors

Motivations for Using Social Media

MOTIVATIONS FOR USING SOCIAL MEDIA

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

To stay in touch with what my friends are doing	40%
To stay up-to-date with news and current events	40%
To fill up spare time	37%
To find funny or entertaining content	36%
To share photos or videos with others	33%
General networking with other people	33%
Because a lot of my friends are on them	31%
To research/find products to buy	29%
To share my opinion	29%
To meet new people	26%
To network for work	23%
To make sure I don't miss out on anything	22%
To watch/follow sports events	20%
To share details of what I'm doing in my daily life	20%
To follow celebrities/celebrity news	19%
To promote/support charitable causes	13%

TOP MOTIVATIONS AMONG 16-24S

% of 16-24s who say the following are the main reasons they use social media

To fill up spare time	46%
To find funny or entertaining content	46%
To stay in touch with what my friends are doing	42%
To stay up-to-date with news and current events	41%
To share photos or videos with others	37%

The role that social media plays in the lives of its users has evolved. **Digital consumers are now as likely to say they use social to follow the news as they are to identify it as a platform for keeping in touch with friends (40%).** Entertainment also now plays a key role in motivating digital consumers to engage with social media, ranking as the fourth most important reason for internet users (36%).

Eased by the spread of smartphone, social media has become a default activity for consumers looking to fill time. **The opportunities for social engagement, at all times of the day and in various locations, have facilitated the evolution of social platforms into entertainment and commerce platforms.**

16-24s are the most likely audience to list 'finding funny or entertaining content' as a main reason they use social media, following by using social media to fill up spare time and 'to stay in touch with what their friends are doing'. Keeping in touch with friends is consistently listed as a reason for using social media across all age groups, but it does seem to be waning as a motivator for 16-24 year olds. In fact, it dropped by 7 percentage points since Q1 2015. With Generation Z and millennials showing less interest in other people's updates, and the growing desire to extricate themselves from the social aspects of social media, social media as an entertaining hub could potentially outlast social media as a medium for human connection. Companies still have time to blend entertaining with commerce, content consumption and advertising in general – or better – to redefine how entertainment is delivered to future generations.

16-24s are most likely to use social media to find funny and entertaining content

Question: What are your main reasons for using social networking services?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Social Media Usage Segmentation

In our social media usage segmentation, individuals are classified into segments based on how they engage with social media. As of Q3 2018, the largest share of social users qualified as *personal* and/or *FOMO networkers*. The majority of social media users qualify as *brand followers*. Clearly, **many social networkers are happy to be exposed to branded content on their newsfeeds**, highlighting how today it is vital for brands to stand-out with an engaging presence across social platforms. Consumers' relationships with brands on these platforms are not always passive either: just under half (48%) can be classed as *brand interactors*, which includes those who are using social platforms to get in touch with brands and those who share posts from brands.

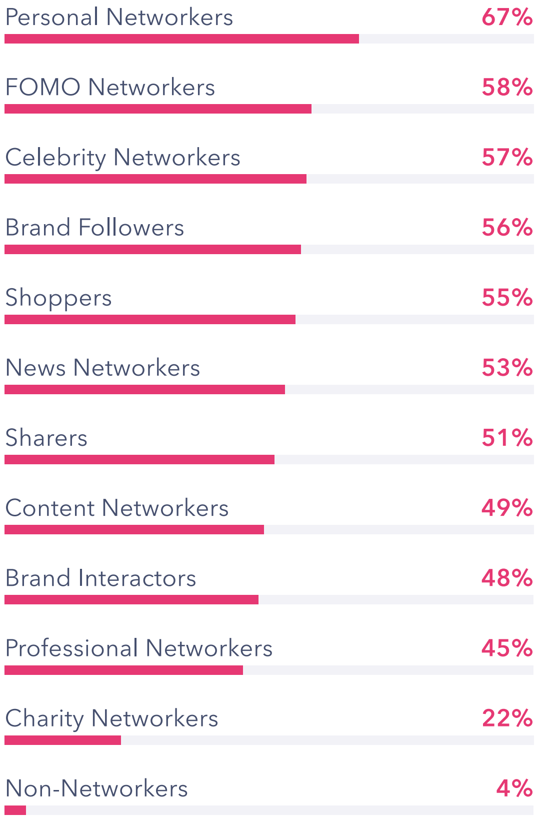
Just under half of consumers can be classed as *brand interactors*

The proportion of *news networkers, shoppers* and *content networkers* shows the extent to which social platforms have developed from being a place to share photos and keep up with friends, to a place to keep up with the news, watch videos, and to research products to buy.

To find how each of these segments are defined, click here.

SOCIAL MEDIA USAGE SEGMENTATION

% who fall into the following segments



Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Who Do They Follow?

More than a third of internet users say they follow their favorite brands on social media, while 1 in 4 follow brands which they are thinking of making a purchase from. 3 in 10 follow news or media organizations via social media and, significantly, the likelihood of doing this doesn't vary appreciably by age except for a slight peak among 25-34s.

The opportunity for brand ambassadors to reach vast audiences via social meeting is apparent – it's 31% who say they like to follow actors and more than 1 in 5 who follow sports stars. *Content networkers* – those who use social media to find entertaining content, watch sports or follow vloggers – are 1.37x more likely than the average internet user to visit a brand's social network and like/follow a brand on a social network, and 1.4x more likely to click on sponsored posts. This reflects the shift we've seen generally in the social media landscape, whereby news, entertainment, shopping and content have taken up a greater role compared to classic social networking. Brands increasing their efforts for better quality content confirms this trend.

SOCIAL FOLLOWING

% who say they follow these types of social media accounts

Brands you like	36%
Actors	32%
Singers, musicians or bands	31%
News / media organizations	29%
Contacts relevant to your work	27%
Brands you are thinking of buying something from	25%
Comedians	24%
Sports stars	22%
Bloggers	22%
Entrepreneurs / business people	18%
Vloggers	17%
Charities / good causes	16%
TV Presenters	15%
Politicians	14%
Journalists	12%

TOP ACCOUNTS AMONG 16-24S

% of 16-24s who say they follow these types of social media accounts

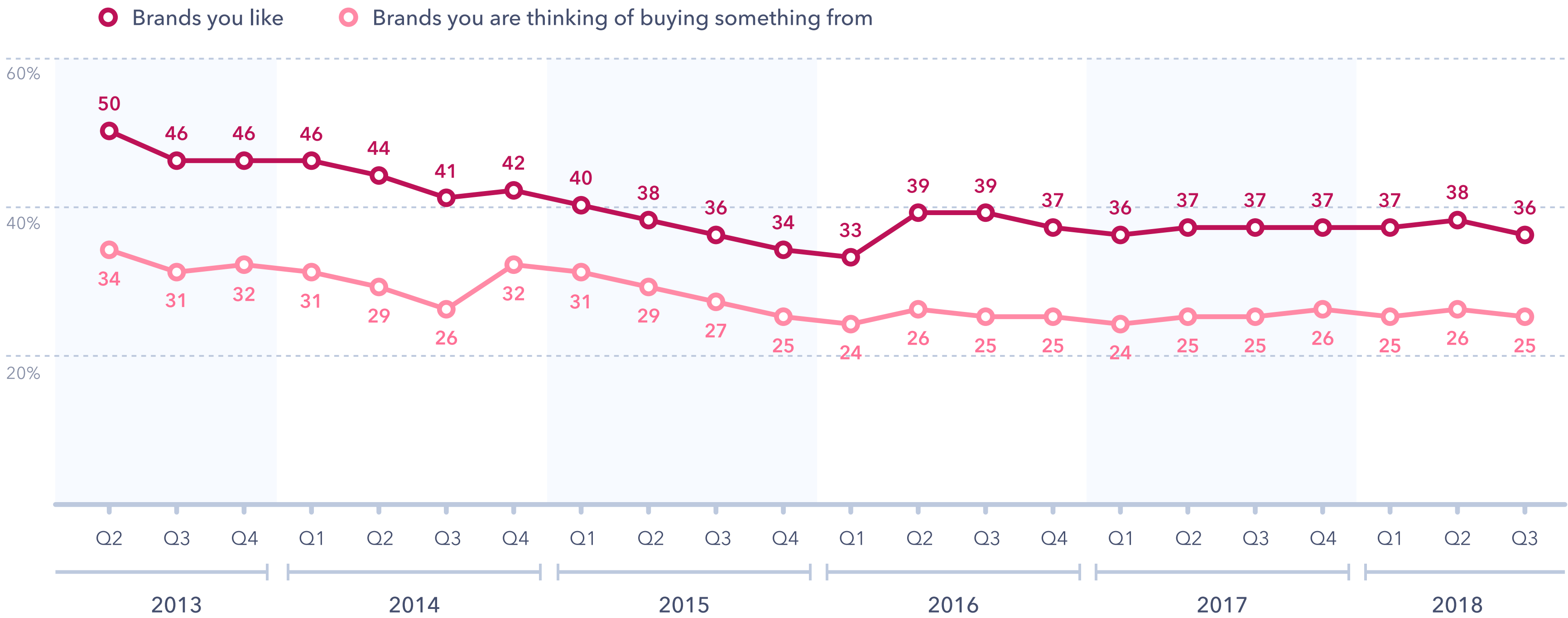
Actors	46%
Singers, musicians or bands	42%
Brands you like	42%
Comedians	33%
Bloggers	30%

Question: Which of these people or organizations do you prefer to follow online via social media services? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Who Do They Follow?

FOLLOWING BRANDS ON SOCIAL OVER TIME

% who say they follow these types of social media accounts



The accounts that **16-24s follow confirms the wide reach that influencers can have**. Almost half of 16-24s (46%) follow actors on social media, placing these accounts ahead of branded ones. And with other celebrities occupying places in the top five, traditional celebrity endorsements should not necessarily be abandoned totally for influencer marketing. In the face of ad-blocking and banner fatigue, many marketers have been attracted to influencer marketing and the opportunity it offers to build relationships on a more organic basis. But there's relatively less evidence that this will be a major route to reach younger consumers, at least from their perspective. Even among 16-24s (the most avid celebrity followers), just 19% say they find new brands via celebrity or influencer endorsements, clearly showing that this group aren't all beholden to influencers and can be reached with other 'traditional' means, too.

Brands don't automatically need an influencer strategy

Question: Which of these people or organizations do you prefer to follow online via social media services?
Source: GlobalWebIndex Q2 2013 – Q3 2018
Base: Internet Users aged 16-64

Social Commerce

Enabling consumers to finalize a purchase while remaining within social apps has been a goal for social platforms for some time now, since. Social commerce is seen to have the potential to be a major revenue generator and an important way to diversify revenue streams beyond advertising.

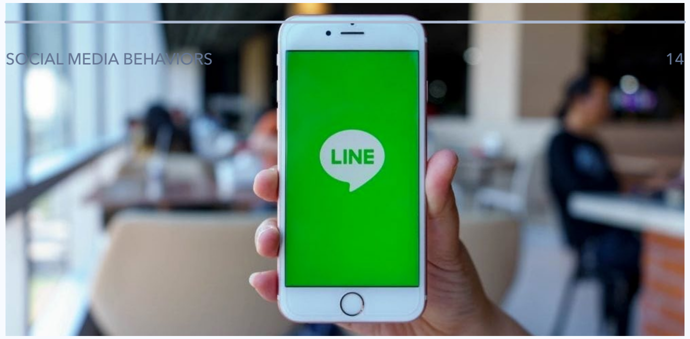
Across Asia, networks like WeChat and Line have successfully facilitated commerce via their platforms, allowing consumers to carry out a range of commerce activities from booking taxis to paying for restaurant bills or items in-store. **But social commerce has been a tough sell in many Western markets.** Online consumer habits here can be difficult to change, especially when it comes to the potentially sensitive information involved in financial transactions.

Social media plays a big role in the purchase journey, but not yet as a point of purchase

Social networks are already an important touchpoint for research: 42% say they use social media to research new brands or products, making this the second-most important channel of all.

And **among 16-24s, social media comes top, having overtaken search engines towards the end of 2017**. There's a decent proportion who are swayed by what people say about brands on these platforms – a quarter of 16-24s and 25-34s say that seeing a brand/product has lots of likes would encourage them to buy something, and even among 35-44s, it's a fifth who say so.

Social media can play a big role in the purchase journey right up to the point of purchase, but the appetite to complete a final purchase within the platform remains low. Most will move to retail sites. Even among 16-24s, just 12% say that a 'buy' button on social media would encourage them to buy something. Especially in Western markets, consumers have been given no real reason or benefit from choosing to buy through a social network rather than going direct to the retailer's e-commerce site. These benefits must be intrinsically social or deeply embedded with payment systems, and must be grounded in consumer-engagement strategies, in order for social commerce to achieve the roaring success seen in particular markets, such as China.



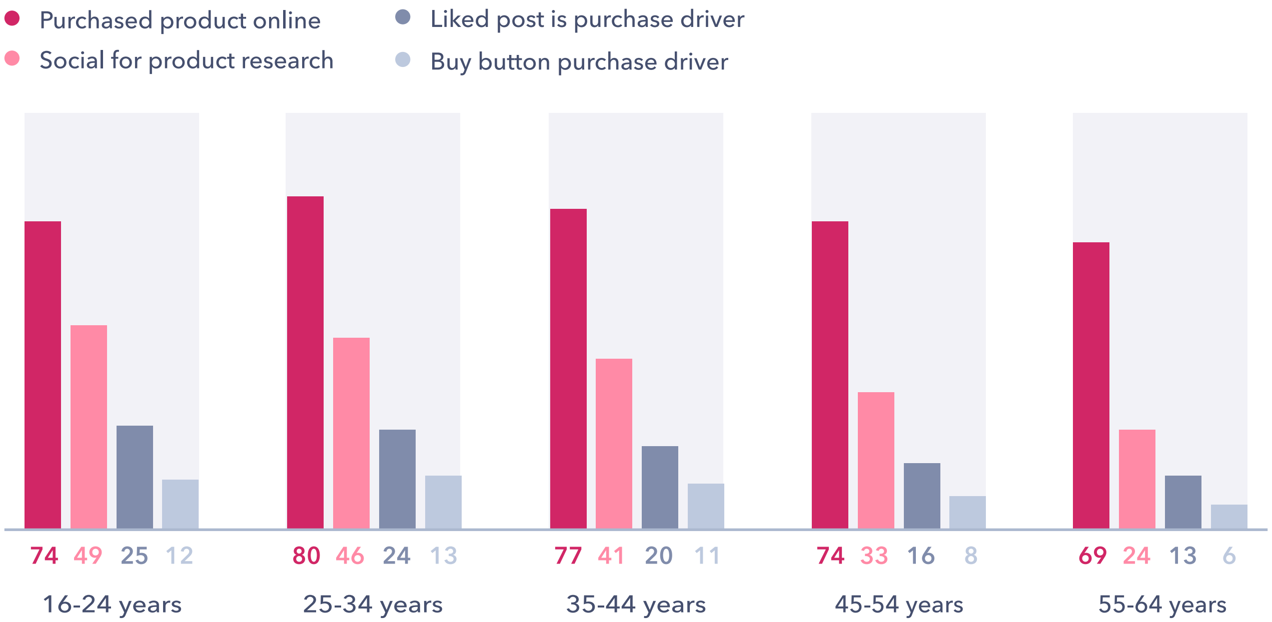
LINE has the highest membership rates and second highest visitor figures in Japan, a country that notoriously spends the least amount of time on social media.

The messaging app has recently made a push to make Japan cashless, and accelerate the uptake of its Line Pay wallet app, by introducing a little gadget that allows shoppers to scan QR codes and pay via LINE. The move comes as Japan pushes to hike its cashless payment ratio to 40% by 2025 – up from 20% in 2016.

Social Commerce

THE POTENTIAL FOR SOCIAL COMMERCE

% of internet users who fall into the following groups



The disconnect between research and purchase has been difficult to crack for retailers, but chatbots – which have been pegged to be a major trend for 2019 as machine learning becomes more nuanced and sophisticated – could change this. Using a live-chat service been gradually decreasing as a brand interaction, from 15% in Q3 2015 to 11% in Q3 2018. The rise of smarter and more efficient chatbots may be able to reverse this trend, and have the potential to encourage consumers to discover new products and services, and complete purchases, all in the same place, and create more engaged and better satisfied customers.

TREND IN ACTION

meesho

Meesho, a Bangalore-based startup in social commerce, has closed its latest series C investment with $50 million funding. The company is a facilitator of social commerce, with a particular focus on WhatsApp. Meesho provides sellers with products and inventory management online, and one of its hallmark features is letting sellers set their own prices across customers.

In our content we often talk about how Instagram, Pinterest and visual platforms are most likely to usher in social commerce in the West, but in India, WhatsApp may be the winner. Not only does it have a huge user base, it added an Enterprise service to the app this year to help out businesses. Meesho allows dynamic price setting, a form of digital haggling, helping it cater to the local market requirements.

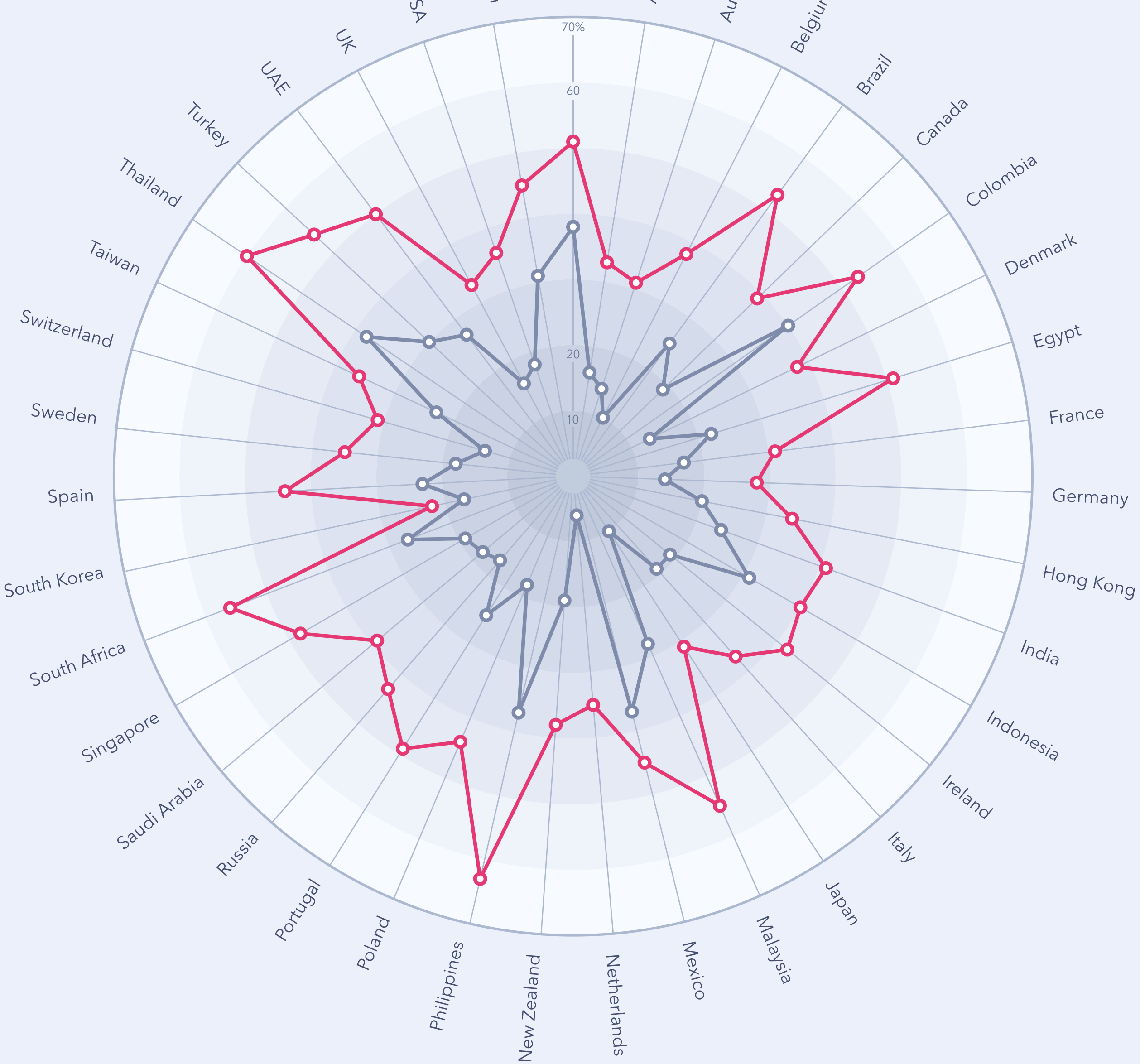
Question: In the past month, which of the following things have you done on the internet via any device? // Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? // When shopping online, which of the following things would increase your likelihood of buying a product?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users Aged 16-64

Social Media Behaviors Market Insights

● % who use social for product research
● % who use 'buy button' as a purchase driver

% who use 'buy button' as a purchase driver	Country	% who use social for product research
41%	Argentina	9%
22%	Australia	6%
23%	Austria	4%
19%	Belgium	3%
47%	Brazil	10%
25%	Canada	6%
45%	Colombia	13%
24%	Denmark	5%
36%	Egypt	16%
20%	France	4%
19%	Germany	3%
24%	Hong Kong	9%
33%	India	16%
38%	Indonesia	13%
31%	Ireland	6%
29%	Italy	5%
17%	Japan	4%
47%	Malaysia	12%
38%	Mexico	11%
16%	Netherlands	4%
22%	New Zealand	6%
59%	Philippines	15%
29%	Poland	8%
30%	Portugal	5%
34%	Russia	6%
31%	Saudi Arabia	15%
36%	Singapore	7%
41%	South Africa	10%
17%	South Korea	5%
26%	Spain	6%
24%	Sweden	5%
20%	Switzerland	5%
23%	Taiwan	9%
49%	Thailand	20%
45%	Turkey	16%
38%	UAE	11%
21%	UK	6%
23%	USA	6%
42%	Vietnam	14%

○ % who use social media for news
○ % who follow brands on social



Social

Social Media Engagement

Who is using social, for how long each day and on what devices?

Social Media Reach

98% of digital consumers are using social media

There's practically no digital audience that cannot be reached via social media. 98% of digital consumers have used a social media network in the past month, showing how in virtually all demographics and markets, **being an internet user means being a social media user**. Even in Japan, where the internet population are relatively older (with an average age of 41), figures only drop to 90% of respondents that are social media users. When we focus in on 16-24s in Japan, though, it's 100% who say they use social media. For more details on the social media engagement across all our markets, please consult the Market Insights section on p. 22.

Mobiles are now the primary social device, as the importance of PC/laptops declines rapidly

Internet users are most likely to be accessing social media via their mobiles, having seen a sharp increase in engagement over the past few years. Although it's still true that the majority of social media users are accessing social platforms via computers *at least some of the time*, PC/laptops are declining as social devices.

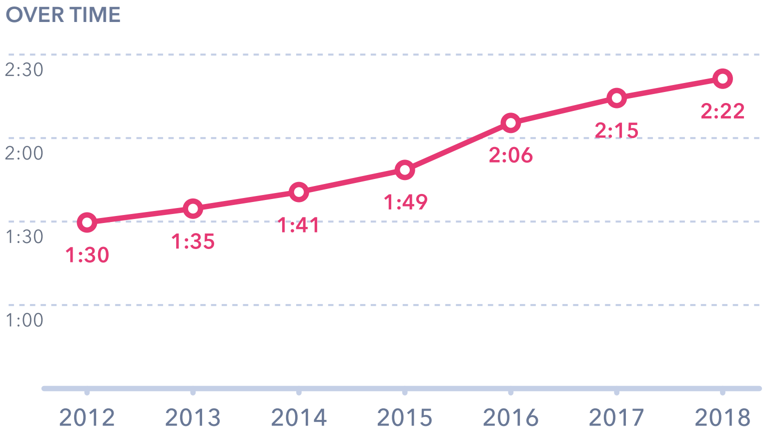
Time Spent on Social Media

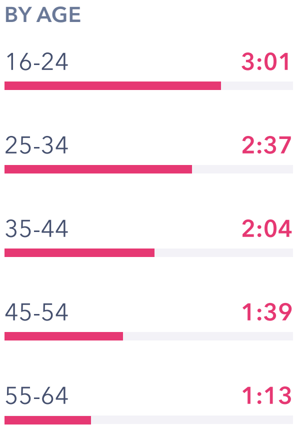
Globally, **digital consumers are now spending an average of 2 hours and 22 minutes per day on social networks and messaging**. However, a look at the trended data here suggests that we might be approaching saturation in social media consumption. In our last flagship report on social media, we found that all 31 countries where trended data from 2012 is available had increasing figures for daily time spent on social media. In Q3 2018, we are starting to see many countries where time spent on social media is plateauing – in 11 out of these 31 markets, time spent online has either stayed the same or decreased. This is likely a result of many internet users having a better awareness of the time they spend looking at screens, as well as the negative effects associated with social media usage, and wanting a digital detox as a result.

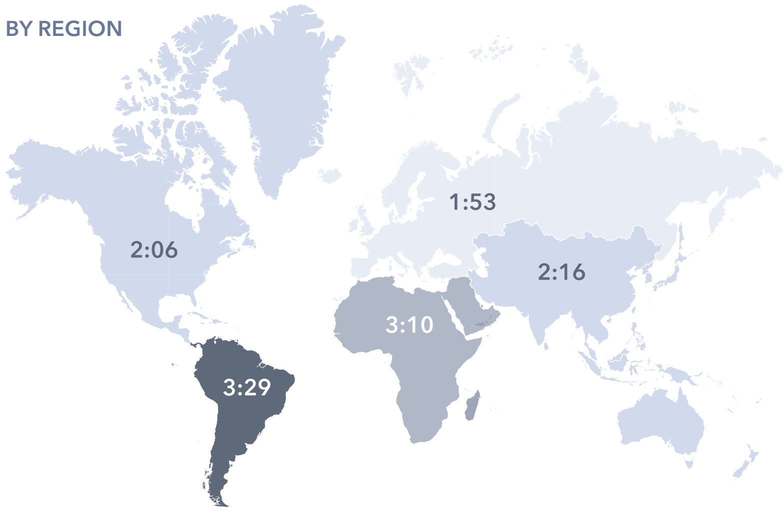
Despite this, there have still been significant increases in time spent on social media in certain countries, The current internet population of Philippines, for example, is spending 11 minutes more per day on social media (4:11) than in 2017 (4:00), even though Philippines already boasts the largest time spent on social media out of all countries we survey. Likewise, countries in the Middle East, such as UAE and Saudi Arabia, have seen significant increases since 2017 in time spent (15 and 19 minutes increase per day respectively).

DAILY TIME SPENT ON SOCIAL MEDIA

Average h:mm spent engaging with/connected to social networks/services during a typical day







16-24s spend 3 hours per day on social media

Question: Roughly how many hours do you spend engaging with/connected to social networks or services during a typical day? **Source:** GlobalWebIndex 2012-2018 (avg. conducted across each wave of research) **Base:** 61,196 (2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,052 (2017), 113,932 (Q3 2018) Internet Users aged 16-64

Time Spent on Social Media

DAILY TIME SPENT ON SOCIAL MEDIA

	2012	2013	2014	2015	2016	2017	2018	Change since 2017
Philippines	2:49	3:06	3:25	3:41	4:07	4:00	4:11	▲ 0:11
Brazil	2:41	2:40	2:50	3:18	3:45	3:40	3:41	▲ 0:01
Indonesia	2:12	2:21	2:26	2:50	3:02	3:26	3:22	▼ 0:04
Argentina	2:42	2:49	2:50	3:13	3:31	3:12	3:20	▲ 0:08
Thailand	1:59	2:34	2:41	2:49	2:46	3:06	3:17	▲ 0:11
Mexico	2:35	2:50	2:53	3:14	3:33	3:11	3:12	▲ 0:01
UAE	2:21	2:29	2:48	3:01	3:24	2:56	3:11	▲ 0:15
Malaysia	2:39	2:53	2:48	2:59	3:18	3:06	3:09	▲ 0:03
South Africa	1:58	2:07	2:16	2:42	2:50	2:47	3:04	▲ 0:14
Saudi Arabia	2:23	2:18	2:35	2:55	2:56	2:38	2:57	▲ 0:19
Turkey	1:56	2:17	2:25	2:34	2:57	2:49	2:50	▲ 0:01
Vietnam	1:47	1:57	2:07	2:16	2:34	2:36	2:40	▲ 0:04
India	1:44	1:57	2:03	2:15	2:30	2:25	2:30	▲ 0:05
Russia	1:40	1:46	1:49	1:52	2:17	2:20	2:26	▲ 0:06
Singapore	1:12	1:30	1:36	1:38	1:58	2:07	2:12	▲ 0:05
USA	1:22	1:34	1:40	1:43	2:04	2:02	2:08	▲ 0:06
China	1:19	1:17	1:24	1:27	1:45	1:58	2:06	▲ 0:08
Hong Kong	1:34	1:26	1:27	1:29	1:39	2:00	1:57	▼ 0:03
Sweden	1:13	1:13	1:22	1:33	1:37	1:54	1:54	–
UK	1:11	1:14	1:19	1:29	1:42	1:54	1:53	▼ 0:01
Canada	1:12	1:29	1:29	1:27	1:41	1:48	1:49	▲ 0:01
Taiwan	1:28	1:30	1:41	1:50	2:03	2:06	1:49	▼ 0:17
Italy	1:33	1:49	1:47	1:58	2:02	1:53	1:44	▼ 0:09
Poland	1:02	1:12	1:13	1:17	1:40	1:42	1:44	▲ 0:02
Spain	1:30	1:30	1:26	1:38	1:43	1:38	1:42	▲ 0:04
Australia	1:15	1:13	1:11	1:10	1:36	1:39	1:39	–
France	01:01	01:05	01:11	01:17	01:23	01:24	01:27	▲ 0:03
Netherlands	0:56	0:59	1:02	1:10	1:16	1:24	1:21	▼ 0:03
South Korea	0:47	0:47	0:58	1:05	1:04	1:11	1:11	–
Germany	0:58	1:04	1:04	1:08	1:07	1:13	1:07	▼ 0:06
Japan	0:23	0:18	0:17	0:20	0:33	0:46	0:39	▼ 0:07

Across the globe, **16-24s are devoting the most time per day to social media – a significant 3 hours 1 minute, on average**. The importance of messaging apps to this demographic is a key reason behind this, as is the centrality of smartphones to their digital lives. But 25-34s are not far behind.

With younger groups being the most enthusiastic about social media, and with the internet populations of fast-growth markets tending to be younger than most mature markets, we have clear context for why the topline figures for daily time spent on social media differ so significantly between markets (from a high of 4 hours 11 minutes in the Philippines to much lower figures of c.1 hour in countries such as South Korea and Germany).

If we examine the habits of 16-24s in isolation, we see many mature markets posting high numbers – with this age group in the UK and Portugal spending more than 3 hours on social media daily. But the effects aren't down to age alone. Even among 16-24s, certain markets primarily in Asia and Latin America stand out for their occupation with social media. Particularly notable are the Philippines, Indonesia, Malaysia, Brazil and Colombia.

Digital consumers average 8.5 social media accounts, but multi-networking seems to be approaching its peak

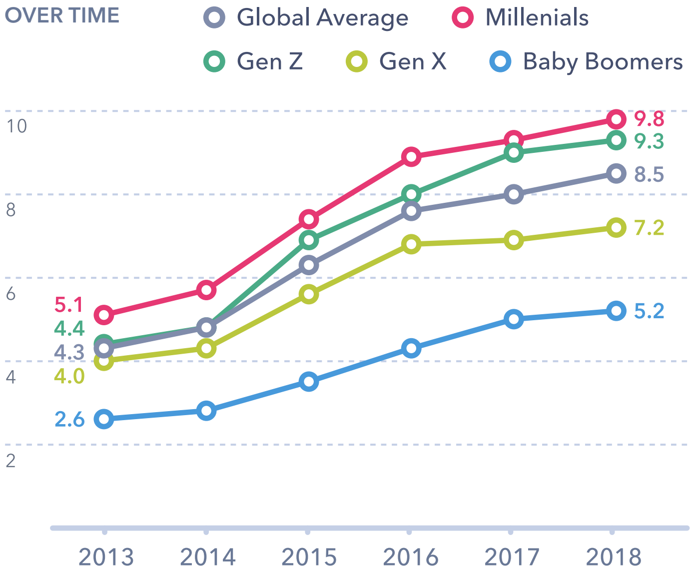
Question: Roughly how many hours do you spend engaging with/connected to social networks or services during a typical day? **Source:** GlobalWebIndex 2012-2018 (avg. conducted across each wave of research) **Base:** 61,196 (2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,052 (2017), and 113,932 (Q3 2018) Internet Users aged 16-64

Multi-Networking

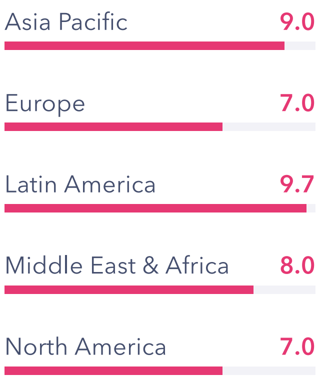
MULTI-NETWORKING

Average number of social media account held by internet users

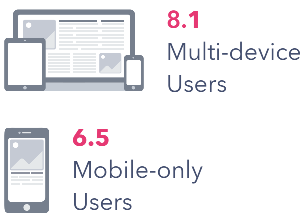
OVER TIME



BY REGION



2018



Social media users are comfortable maintaining a presence across a number of platforms; while the average internet user had about 4 social media accounts in 2013, the figure has now risen above 8. This multi-networking is a response to the widening choice of platforms, but it is also being caused by a **degree of specialization**, where some users turning to particular platforms to carry out certain types of networking behaviors.

Just as time spent on social media is beginning to plateau, online consumers seem to be close to maxing out the number of platforms that they are members of. 2017 marked the first year that we observed no appreciable growth in the average number of social media accounts per internet user, and this trend has continued into 2018. There are many factors that have influenced this plateauing, including the growth in internet usage among older consumers who tend to be less likely to multi-network, and the stagnation of user growth on certain key platforms. However, the most important trend to understand regarding this peak in multi-networking is **the rise of the mobile-only internet user** who focus their social engagement on a select group of platforms, highlighting how choice of platform is influenced by device preference.

Certain demographics and countries stand out for their enthusiasm for multi-networking. Millennials are still ahead of Generation Z in the number of accounts they hold (9.8 vs. 9.3), which emphasizes the continuing importance of social media across the millennial generation. Younger audiences are perhaps less beholden to certain platforms, making it easier to be more selective about which they actively engage and contribute in. Indonesia, India and Vietnam mark themselves out as the keenest on having a diverse social media portfolio. While social media use has generally plateaued among many of the advanced economies surveyed, emerging nations seem to be much heavier social media users. Meanwhile, the relatively lower figures in certain African markets is illustrative of the widespread nature of mobile-only usage in these countries. So, for example, the internet population of Morocco, in which mobile is the only point of access among many consumers, averages just over six social media accounts. For more detailed information, please see our Market Insights infographic on p. 22.

Question: On which of the following services do you have an account? **Source:** GlobalWebIndex 2013-2018 (avg. conducted across each wave of research) **Base:** 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,052 (2017), 113,932 (Q3 2018) Internet Users aged 16-64

Social Media Engagement Market Insights

Country	Social accounts 2017	Social accounts 2018	Daily on social AVG.	Daily on social 16-24	Use social	On mobile	PC/Laptop
Argentina	8.4	8.9	3:20	3:50	100%	79%	94%
Australia	5.6	6.2	1:39	2:59	96%	76%	78%
Austria	5.7	6.2	1:17	2:02	98%	82%	83%
Belgium	6.1	6.8	1:29	2:24	97%	83%	75%
Brazil	9.2	9.3	3:41	4:14	100%	87%	94%
Canada	6.4	6.8	1:49	3:01	98%	77%	76%
China	7.9	8.2	2:06	2:28	98%	65%	94%
Colombia	–	7.0	3:27	4:02	100%	87%	96%
Denmark	–	10.5	1:43	2:43	100%	76%	81%
Egypt	9.7	10.0	3:00	3:03	100%	87%	96%
France	5.7	6.0	1:27	2:38	98%	76%	81%
Germany	5.1	5.1	1:07	2:04	100%	77%	92%
Ghana	6.2	6.7	3:05	3:30	95%	77%	73%
Hong Kong	8.5	9.0	1:57	2:49	93%	76%	73%
India	11.2	11.8	2:30	2:37	100%	76%	92%
Indonesia	11.6	10.8	3:22	4:03	100%	82%	93%
Ireland	7.4	8.0	1:59	3:32	100%	72%	97%
Italy	7.0	7.1	1:44	2:50	98%	79%	87%
Japan	3.6	3.8	0:39	1:29	98%	77%	88%
Kenya	6.4	6.9	3:02	3:19	90%	62%	69%
Malaysia	9.4	9.8	3:09	4:02	100%	77%	97%
Mexico	9.3	10.4	3:12	3:50	100%	83%	95%
Morocco	5.9	6.2	2:43	3:21	96%	74%	76%
Netherlands	6.1	6.2	1:21	2:18	98%	81%	83%

Social Media Engagement Market Insights

Country	Use social	Social accounts 2017	Social accounts 2018	Daily on social Avg.	Daily on social 16-24	On mobile	PC/Laptop
New Zealand	100%	6.9	7.1	1:41	2:36	85%	96%
Nigeria	99%	6.8	6.9	3:34	3:40	90%	84%
Philippines	100%	9.8	10.3	4:11	4:27	86%	88%
Poland	99%	6.4	7.5	1:44	2:34	91%	80%
Portugal	99%	8.0	8.6	2:12	3:27	55%	94%
Russia	99%	7.2	7.1	2:26	3:52	80%	92%
Saudi Arabia	100%	9.6	9.3	2:57	3:31	84%	92%
Singapore	96%	8.5	8.8	2:12	3:24	65%	87%
South Africa	99%	8.3	8.2	3:04	3:50	78%	86%
South Korea	99%	5.8	6.2	1:11	2:04	70%	86%
Spain	97%	7.6	7.8	1:42	3:19	78%	81%
Sweden	99%	6.9	7.1	1:54	2:58	83%	93%
Switzerland	100%	6.5	6.5	1:19	2:08	64%	96%
Taiwan	99%	8.4	8.4	1:49	2:34	74%	94%
Thailand	100%	9.7	10.5	3:17	3:29	76%	97%
Turkey	96%	9.1	9.6	2:50	3:00	71%	79%
UAE	97%	9.4	9.9	3:11	3:21	79%	81%
UK	100%	6.8	7.1	1:53	3:13	81%	96%
USA	98%	6.7	7.1	2:08	3:05	70%	84%
Vietnam	100%	9.9	10.8	2:40	2:47	84%	96%

Social

Entertainment on Social Media

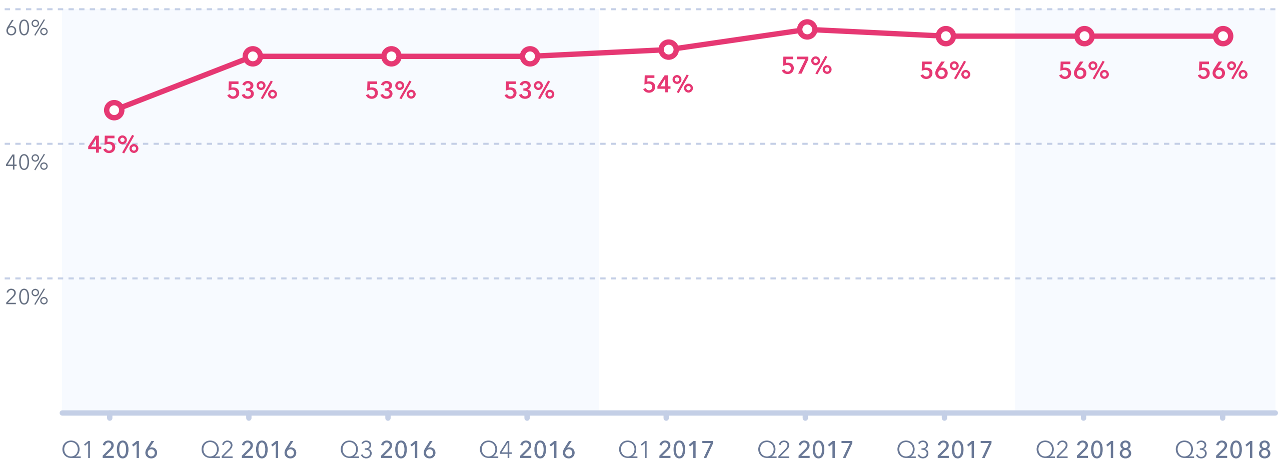
How do internet users engage with entertainment content on social media?

Social Video

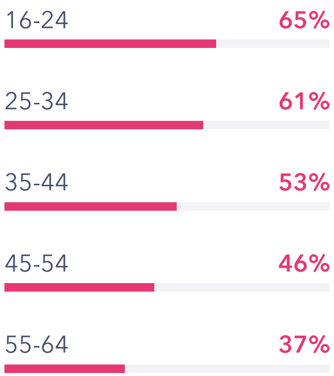
SOCIAL VIDEO VIEWING

% of internet users who are Social Video Viewers

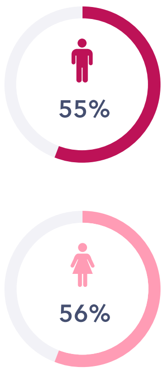
OVER TIME



BY AGE



BY GENDER



56% of internet users outside China have watched a video on Facebook, Twitter, Snapchat or Instagram in the past month. As more and more become acclimatized to consuming video on social networks, and as online TV takes off more generally, clear opportunities will arise for Facebook and other platforms to move aggressively into the world of TV.

Facebook recently announced IGTV (Instagram Television), a longer-form video hub found on both the Instagram app and through a separate IGTV app, to compete with the dominance of YouTube.

This comes after Facebook Watch – Facebook's on-demand service – failed to takeoff, despite a reported 2018 budget of $1 billion. An important advantage that IGTV has is that users have full control over what videos they watch, meaning users will only see the shows they have actively chosen.

Question: Which of these things have you done within the last month on Facebook/ Instagram/Snapchat/Twitter? **Source:** GlobalWebIndex Q1 2016 – Q3 2018 **Base:** 98,011 Internet Users aged 16-64 (Excl. China)/804,272 Internet Users aged 16-64 (Excl. China)

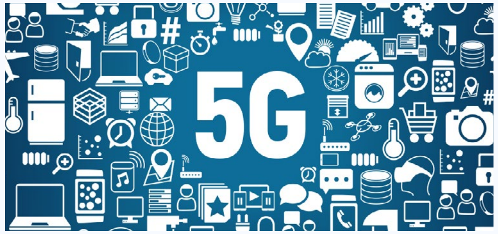
Live Streaming

Live video has quickly 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 resembles one of the most important trends in which entertainment and marketing overlap the most. For brands, live video allows them to engage with consumers in a two-way interaction, with a greater sense of trust, transparency and immediacy. While there was no official live stream from London Fashion Week organizers this year, brands instead streamed their own shows from their sites – something Burberry pioneered a few seasons ago. This is an innovative meger of social content, commerce and event broadcasting that's uniquely crafted to the fashion market.

Among users of four major social platforms outside of China, 28% engage with live streams each month on any one of these services. **Facebook takes the lion's share here, having the largest user base as well as the highest engagement rates with live video.** Despite being one of the earliest entrants into the live video market, Twitter's Periscope attracts a much smaller share of its user base.

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.

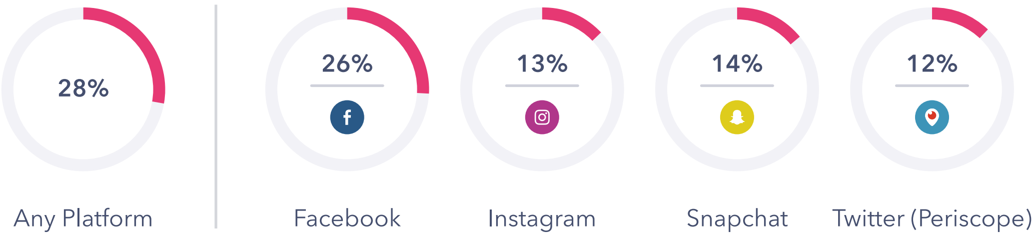
As we mentioned earlier, sports entertainment has been a focal point for many major social platforms. Live video has proven an important gateway for users to interact with sports events on these platforms, as well as engage in the conversation around these events. That's partly why **internet users who have watched a live stream on Facebook, Twitter, Snapchat or Instagram are 82% more likely than the average internet user to say watching sports events is a main reason for using social media, with 37% saying so**. As more sports leagues look to further explore online distribution channels to expand their global reach, social media will continue to strengthen its position in the sports entertainment industry. Platforms have been sliding into this space for a while now, such as Facebook's deals with the MLB, MLS and La Liga, and Twitter's deals with the NBA and WNBA.



The imminent rollout of 5G networks around the world will have huge applications for media consumption, with users being to seamlessly stream data-heavy applications, from gaming and videos to VR and AR. 5G networks will have very low latency (very responsive with no delay), meaning they will be exponentially faster than current networks and more robust, and will be able to unlock a new level of immersive video offerings for brands and advertisers.

LIVE-STREAM VIEWING ON SOCIAL

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



Live streaming represents an important trend in which entertainment and marketing overlap the most

Question: Which of these things have you done within the last month on Facebook/Instagram/Snapchat/Twitter?
Source: GlobalWebIndex Q3 2018 **Base:** 98,011 Users of each platform aged 16-64

Social Music

TIME SPENT ON MUSIC STREAMING SERVICES

Average time spent listening to music streaming services per day in h:mm

	All Users	Facebook	Snapchat	Instagram	Twitter
2017	1:09	1:15	1:47	1:31	1:29
2018	1:17	1:24	1:57	1:38	1:42

Although music entertainment has been a part of the social media story for some time now, it hasn't quite established itself commercially, or received the same hype, as video and live streaming. Even so, **many social platforms have taken significant strides towards making inroads into music entertainment**.

It's not difficult to see why offering a music streaming service could open up significant revenue streams for the major Western platforms, especially considering their sheer reach and impressive daily engagement frequencies. Our data also shows that **users of Facebook, Snapchat, Twitter and Instagram are all spending longer on music streaming services per day on average, and this engagement climbs significantly among their younger users**.

The traditional music streaming industry has shown that sustainable business models in this market require extremely deep pockets to offset the inevitable losses and high royalty fees, and platforms like Facebook could position themselves well here. But navigating the complexity and legislation of the licensing deals and contracts needed to build up a large and competitive music library will mean that the path to social music will be fairly long and drawn out. The shift in consumer perspective in seeing social as an important means of engaging with many forms of entertainment will certainly reassure the likes of Facebook, but it might still be a while before we see Facebook or Snapchat follow suit from other platforms around the world in offering a fully-fledged music streaming platform to contend with Spotify and Apple Music.

Question: Which of these things have you done within the last month on Facebook/ Instagram/Snapchat/Twitter? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

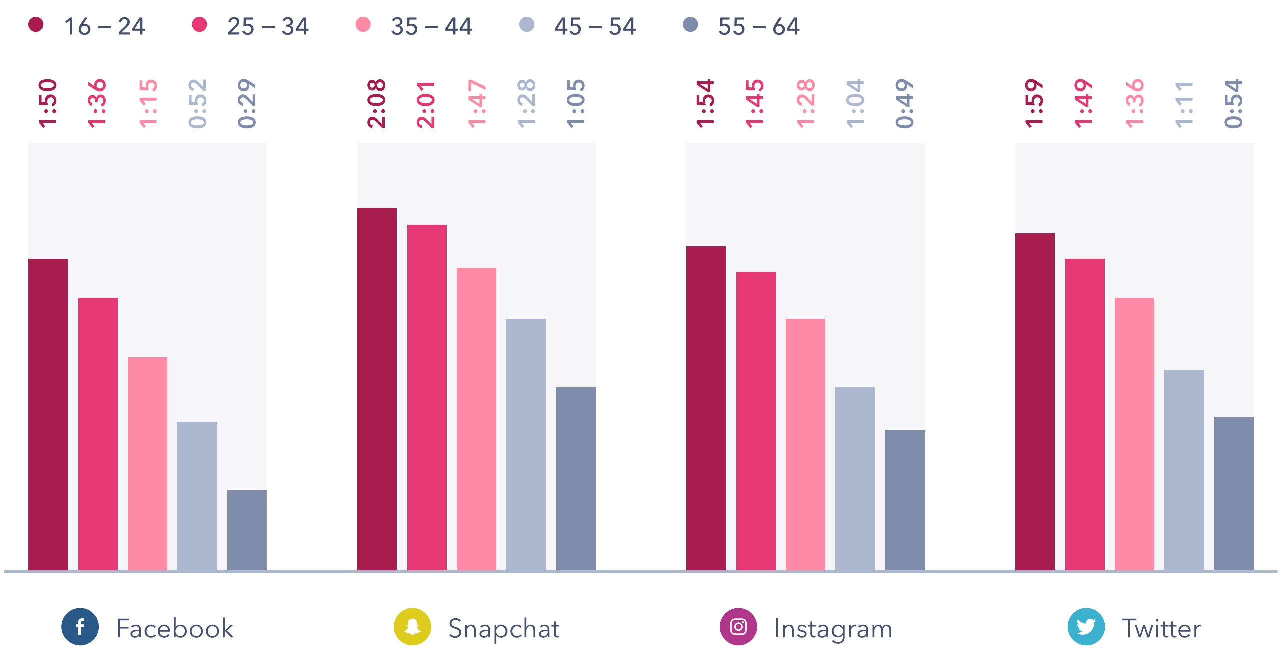
Social Music

In other parts of the world, **major regional social platforms have already moved into the music streaming sector, and serve as important examples for their Western counterparts**. Facebook's Russian equivalent, VKontakte (or VK, for short) reported 1.5 million subscribers for its music streaming service, which makes the service by far the country's biggest paid subscription music service. In China, parent company Tencent holds a combined 76% of the Chinese music streaming market with it's four music apps – Tencent Music, QQ Music, Kugou Music and Kuwo Music. However, despite their regional success, the planned listing of Tencent Music Entertainment in the U.S., where Tencent was expecting to raise an estimated $2bn from the initial public offering, has been put on a hold because of a general slump in global tech stocks.

Social media users spend longer per day on music streaming services

TIME SPENT ON MUSIC STREAMING SERVICES

Average time spent listening to music streaming services per day in h:mm



TREND IN ACTION

Facebook is working to bring back teenagers with a standalone music platform

Facebook is working on an app to enter the lip-syncing/teen music app trend, inspired by TikTok/Musical.ly. Codenamed Lasso, it will stand alone from Facebook's current platforms. Instagram has also recently launched music stickers on its Stories, a feature that lets users click through to SoundCloud, and Facebook's core platform began letting users pin their favourite songs to their profile.

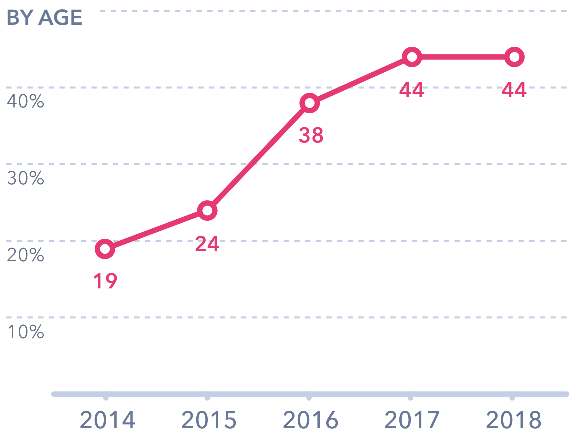
Social music was one of the trends we highlighted in our Trends 18 report, though developments since then have been thin on the ground. We're beginning to see what Facebook's strategy for its music-licensing deals will be; not an independent streaming service, but a way to entice teens back to their platform and capitalize on the trend of sharing music-enhanced content.

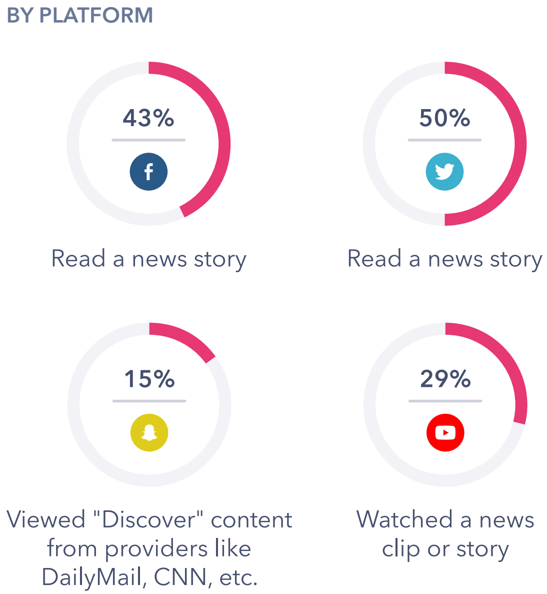
Question: Which of these things have you done within the last month on Facebook/Instagram/Snapchat/Twitter? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

News Consumption on Social Media

SOCIAL NEWS ENGAGEMENT BY PLATFORM

% of Facebook, Twitter, Snapchat, YouTube Users who have engaged with news content in the past month





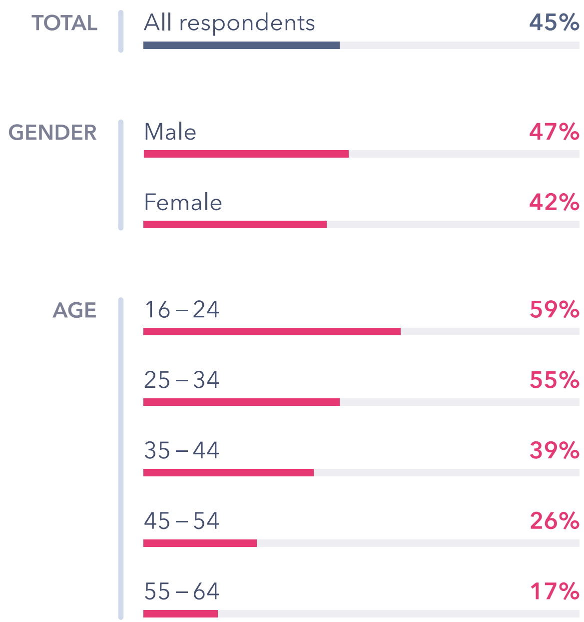
Staying up-to-date with current events is – along with keeping in touch with friends – the joint most cited reason (40%) for using social media.

As we saw earlier, **internet users are now devoting almost 2 ½ hours to social media per day. That's nearly 40 minutes more per day than print press (0:43) and online press (1:01) combined.** So it's not difficult to see why news consumption has grown year-on-year across Facebook, Twitter, YouTube and Snapchat. Facebook and Twitter are the top destinations for social news consumption outside China -- half of Facebook's user base are reading news stories on the platform each month, with a similar rate of Twitter users doing the same on the micro-blogging platform.

We also ask respondents about how they tend to access content from 28 online news services. Social media are the leading source, well ahead of the publishers' own websites and apps. **45% of internet users access any of these 28 news services on social media in the last 30 days, a behavior which increases to 59% for 16-24s and 55% for 25-34s**.

NEWS CONSUMPTION ON SOCIAL MEDIA

% who have viewed a news article/video/story on social media in the past 30 days



In order to establish beneficial relationships which work for both social platforms and publishers, **the social media industry needs to reassure publishers that it will harness the increasing consumer preference for social news in a way that upholds their business models**.

Question: Which of these things have you done within the last month on Facebook/ Twitter/Snapchat/YouTube? **Source:** GlobalWebIndex 2014 – 2018 **Base:** 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,052 (2017), 113,932 (2018) Internet Users aged 16-64

Question: For these services, could you tell us where you have seen one of their videos, articles or stories online during the last 30 days? Please select all places that apply for each service **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

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 Q3 2018 wave of research across 44 countries, which had a global sample size of 113,932.

Argentina	1,573	Morocco	1,000
Australia	2,346	Netherlands	1,276
Austria	1,303	New Zealand	1,287
Belgium	1,276	Nigeria	1,000
Brazil	2,381	Philippines	1,581
Canada	2,321	Poland	1,856
China	15,921	Portugal	1,297
Colombia	1,323	Russia	2,287
Denmark	1,293	Saudi Arabia	1,505
Egypt	1,754	Singapore	2,563
France	3,292	South Africa	1,547
Germany	2,889	South Korea	1,289
Ghana	1,000	Spain	2,881
Hong Kong	1,889	Sweden	1,287
India	4,157	Switzerland	1,286
Indonesia	1,773	Taiwan	1,830
Ireland	1,264	Thailand	1,562
Italy	2,870	Turkey	1,610
Japan	1,731	UAE	1,784
Kenya	1,000	UK	7,869
Malaysia	1,575	USA	16,125
Mexico	2,667	Vietnam	1,612

Notes on Methodology

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

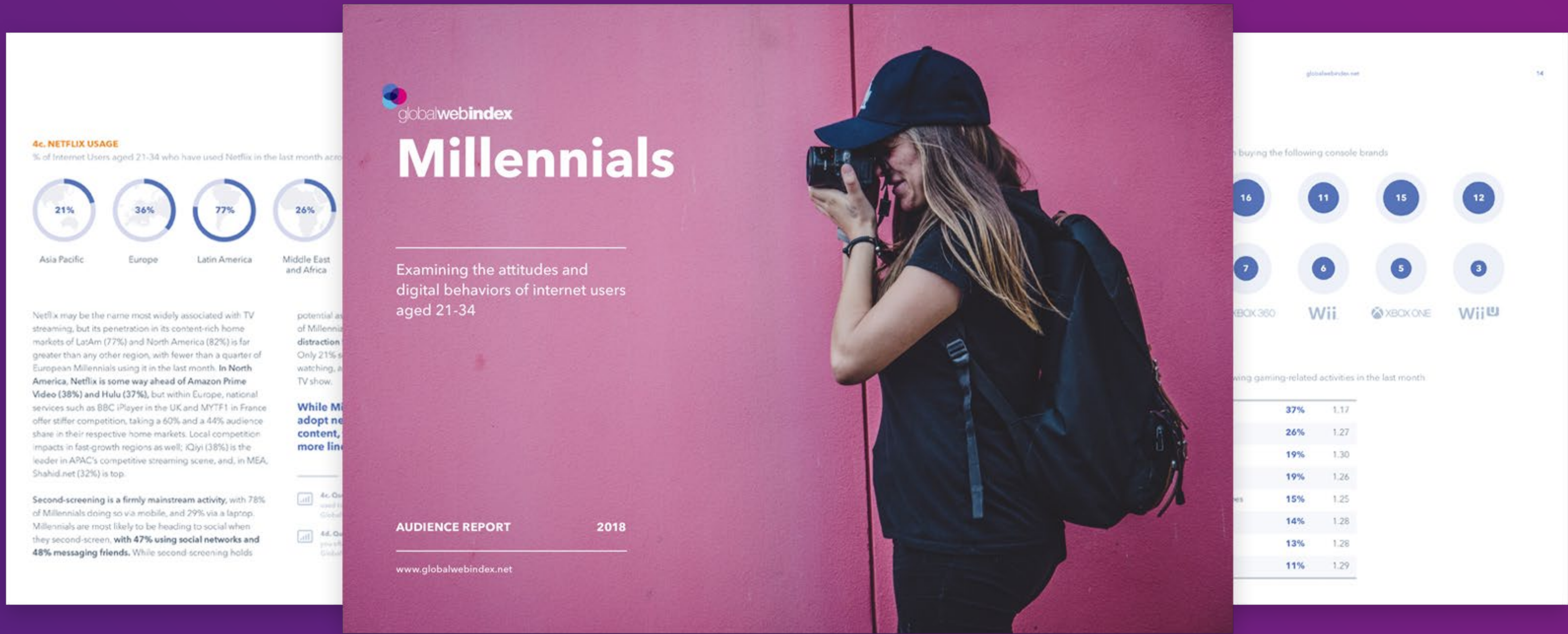
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

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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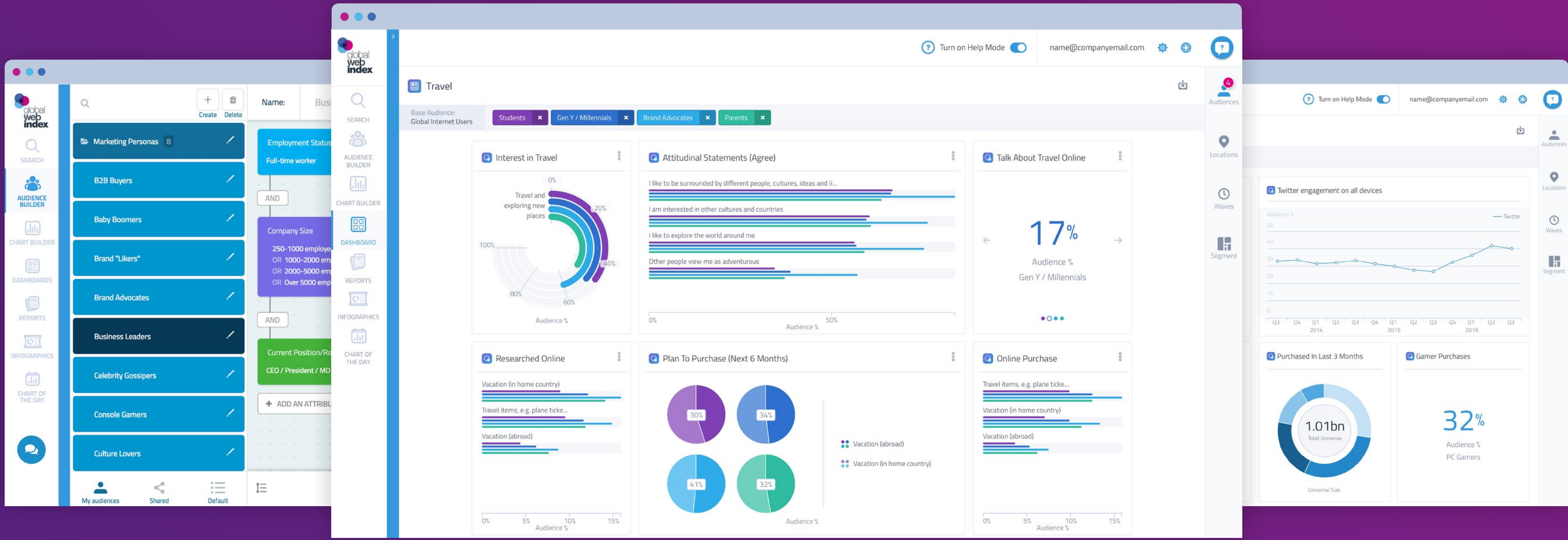

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