

GWISOCIAL

Summary

GlobalWebIndex's quarterly report on the latest trends in social networking – providing insights on topline and national levels of engagement as well as current behaviors across devices and age groups.



Q4 2014

INTRODUCTION

GWI Social is where GlobalWebIndex presents the very latest figures for social networking behaviors and engagement levels across more than 30 global markets.

Drawing on our Q4 2014 wave of research among 41,983 online adults, we highlight a range of demographic, region and market specific trends and offer insights on:

- The most popular social networks and apps, including rates of growth during 2014
- Time spent on networking, as well as average numbers of accounts per person
- The rise of mobiles, tablets and messaging services
- Trends among younger groups, and teens in particular

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

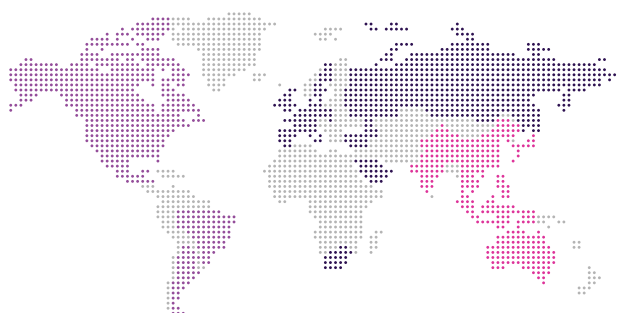
In this summary, we provide the key headlines and statistics from the report; for more detailed insights, coverage and implications, please see the full version.

Clients can access further detail on any of the topics covered in this report through our pre-cut data packs available to download in the Insight Store, or by analyzing them against bespoke, target audiences in our PRO Platform.

For further details on social trends at a national level, please see our Market Reports – each of which contains a section dedicated to networking platforms and behaviors.

NOTES ON METHODOLOGY

Each year, GWI interviews more than **170,000 internet users** across **32 markets** – making it the largest on-going study into the digital consumer instigated to date.



AMERICAS

US / Canada / Mexico / Brazil / Argentina

EMEA

UK / Ireland / France / Germany / Italy / Spain / Netherlands / Poland / Turkey / Russia / Sweden / Saudi Arabia / UAE / South Africa

APAC

China / Hong Kong / Singapore / India / Indonesia / Japan / Taiwan / Vietnam / Thailand / Malaysia / South Korea / Australia / Philippines

Research is conducted in quarterly waves, each of which has a global sample size of more than 40,000 internet users. Typically, we interview between 3,000 and 4,000 per market per year, with larger samples in key markets such as the UK and the US (30,000 each). Data is collected in the last six weeks of each quarter, ensuring it is as up-to-date as possible.

Respondents complete an **online questionnaire** that uses stratified sampling techniques to ensure that they are **representative of the internet population aged 16 to 64** in each country. No individual can participate in our survey more than once a year, and we set quotas to ensure correct proportions in terms of gender, age and educational attainment. This data is also used to calculate the **universe estimates** – which are designed to provide highly informed approximations as to the number of users (in millions) that any percentage represents.

Throughout GWI Social, we look at three forms of engagement with social platforms:

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

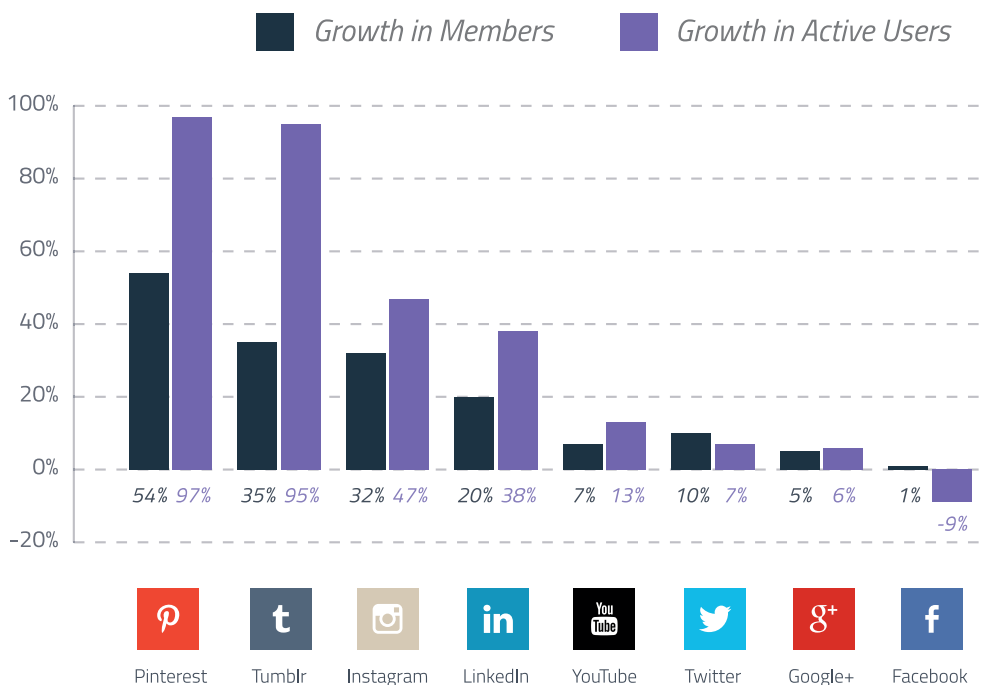
These definitions are consistent across all of the platforms we track and thus allow accurate comparisons between networks. In contrast, self-published figures from social networks tend to use a wide and competing range of factors.

Due to the sheer scale of the Chinese market, its high number of local platforms and the official restrictions it places on sites such as Facebook and Twitter, China is excluded from our global charts which reference named/specific networks.

PINTEREST AND TUMBLR LEAD GROWTH RATES, BUT FACEBOOK DROPS BY 9%

- Of the major social networks, **Pinterest (+97%)** and **Tumblr (+95%)** recorded the biggest rises in active user numbers across 2014.
- **Instagram (+47%)** and **LinkedIn (+38%)** experienced very healthy rises too, reflecting the trend towards more diversified forms of networking as well as the ongoing rise of the smaller social platforms.
- **Facebook was the *only* big network to experience a drop in active usage in 2014 (of -9%).** This decline was consistent across all regions and age groups, peaking among 16-24s (-11%), 25-34s (-12%) and in Asia Pacific (-12%).

TOP SOCIAL PLATFORMS: GROWTH IN MEMBERS AND ACTIVE USERS DURING 2014



Question: On which of the following services do you have an account? // Active users: Which of the following services have you used or contributed to in the past month using any type of device? // **Source:** GlobalWebIndex Q1 2014 & Q4 2014 // **Base:** Internet users aged 16-64, exc. China

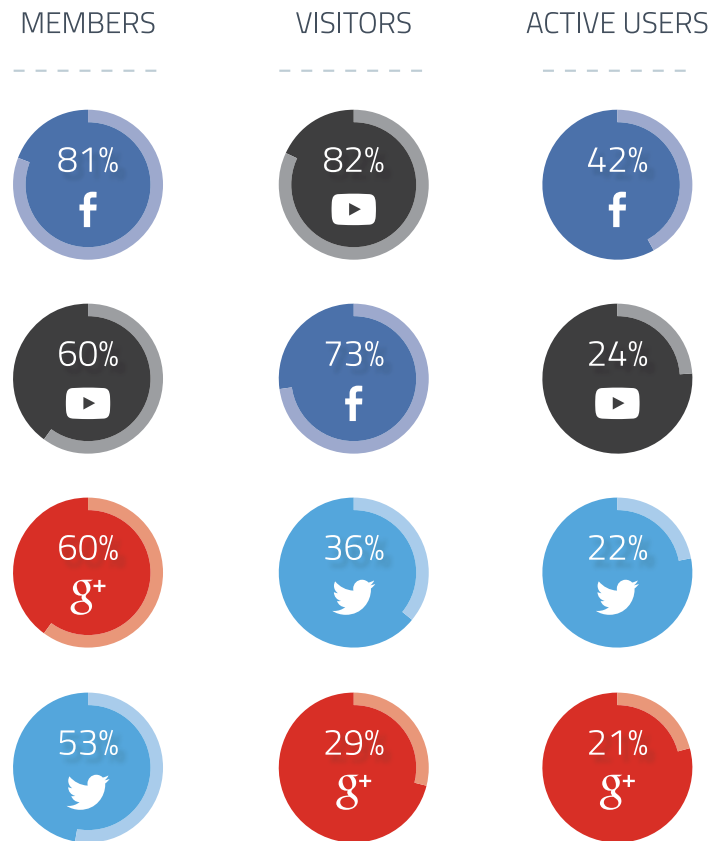


Want to explore this data on the PRO Platform? Enter "Account" or "Active" in the free search box, or click *Social Media > Social Platforms > Account Ownership / Active User*. Alternatively, you can download our pre-cut "Account Ownership: Social Platforms" or "Active Usage: Social Platforms" data packs

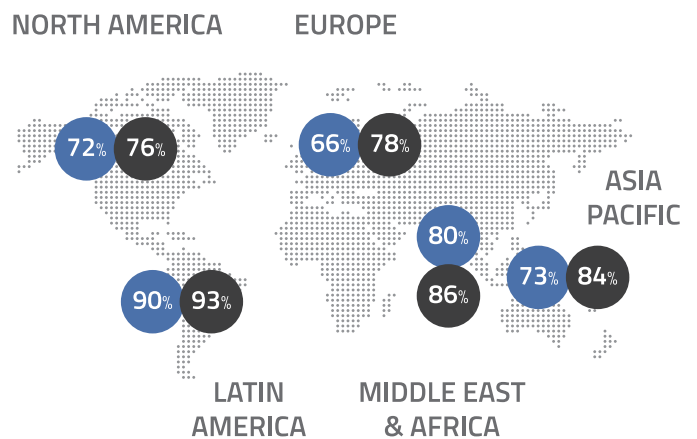
FACEBOOK STILL NUMBER ONE, BUT IS BEING USED MORE PASSIVELY

- Despite a decline in active usage, **Facebook is still by far the most popular social network** outside of China – with the most members (81%) and active users (42%).
- YouTube, Twitter and Google+ come next – each being actively used by between a quarter and a fifth – followed by Instagram, LinkedIn, Pinterest and Tumblr.
- That acknowledged, **YouTube is being visited by 82% of internet users aged 16-64**, putting it *ahead of* Facebook (73%) on this measure. This pattern holds true across 29 of the 32 countries surveyed by GWI.
- Facebook is being used more passively as it transitions into a hub that underlies our social behaviors rather than hosts them directly. **40% of Facebook users in fact say that they have “browsed their newsfeed for updates without posting/commenting on anything”** in the last month. What’s more, teens are less likely than others to be carrying out 17 of the 20 or so different Facebook behaviors tracked in the GWI survey.

THE BIG 4 SOCIAL PLATFORMS: MEMBERS, VISITORS AND ACTIVE USERS



Facebook vs YouTube Visitors, by Region



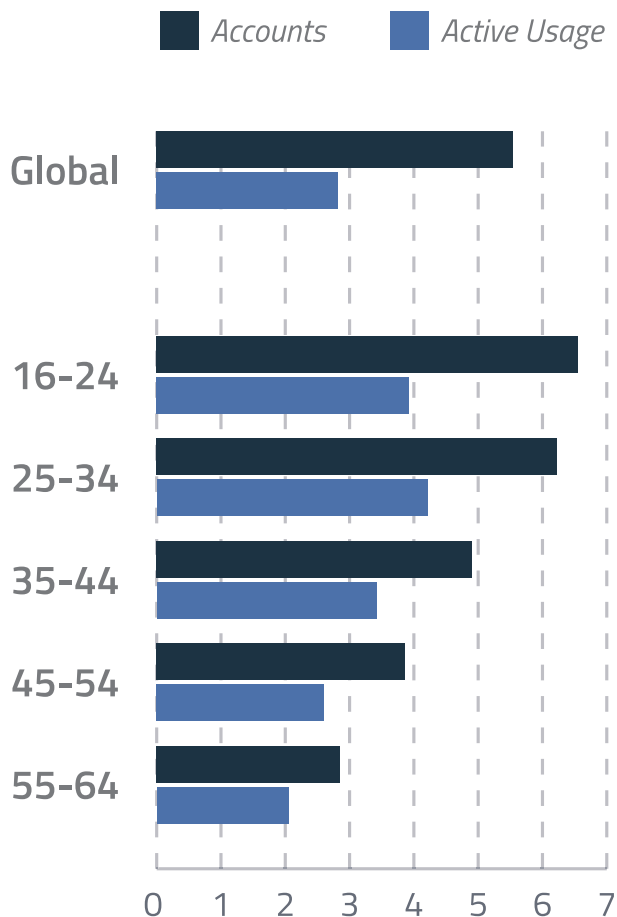
Question: Membership: On which of the following services do you have an account? // Visitation: Which of the following websites/services have you visited or used in the last month via any device? // Active usage: Which of the following services have you used or contributed to in the past month using any type of device? // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet users aged 16-64, exc. China

Want to explore this data on the PRO Platform? Enter "Account" or "Active" in the free search box, or click *Social Media > Social Platforms > Account Ownership / Active User.*

MULTI-NETWORKING IS WIDESPREAD

- On average, **adults have accounts on 5.54 networks** and are active users on 2.82 of them.
- **18% of internet users have visited YouTube, Facebook, Twitter and Google+ during the last month**, while a third have visited YouTube, Facebook and Twitter – dispelling the notion that there is no or little overlap between the audiences of the three leading networks. In fact, 9 in 10 Facebook visitors are also accessing YouTube each month, while close to half are visiting Twitter.
- This trend towards multi-networking helps to explain why the **total time being spent on social networks continues to rise** – from an average of 1.61 hours per day in 2012 to 1.72 in 2014.

AVERAGE NUMBER OF SOCIAL MEDIA ACCOUNTS



Question: On which of the following services do you have an account? // Active users: Which of the following services have you used or contributed to in the past month using any type of device? //

Source: GlobalWebIndex Q4 2014 // **Base:** Internet Users aged 16-64



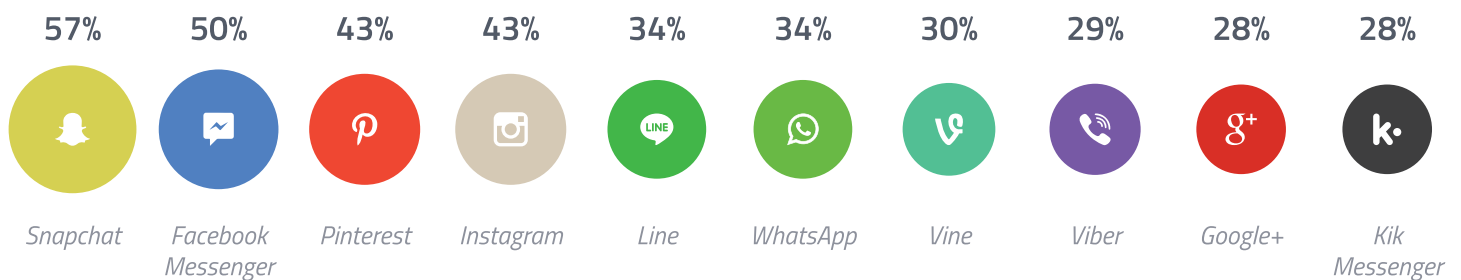
Want to explore this data on the PRO Platform? Enter "Account" or "Active" in the free search box, or click *Social Media > Social Platforms > Account Ownership / Active User*.

FACEBOOK RULES THE APP SPACE, BUT SNAPCHAT IS GROWING THE FASTEST

- **Facebook is the most popular social app** (41%), with Facebook Messenger (27%) and WhatsApp (25%) being the leading messaging services.
- In the messaging space, Facebook Messenger tends to be top in mature markets while **WhatsApp is ahead in fast-growth countries** – underlining why the latter was such a valuable acquisition for Facebook. That said, Kakao Talk is the clear number one in South Korea, LINE is ahead in a handful of APAC countries and WeChat is absolutely dominant in China.
- What's more, **Snapchat was the fastest growing social/messaging app overall in 2014 (+57%)**, with teens over-indexing more strongly for this service than for any other; more than a third of 16-19s are now using Snapchat in the UK, Ireland, Sweden and the USA

SOCIAL AND MESSAGING APPS: GROWTH IN 2014

Top 10 Fastest Growing Social/Messaging Apps in 2014



Snapchat: Top countries for teen usage



Snapchat

| | Teens | Over-Index |
|---------|-------|------------|
| UK | 39% | 8.46 |
| Sweden | 38% | 8.22 |
| USA | 35% | 7.58 |
| Ireland | 33% | 7.23 |
| Canada | 26% | 5.55 |

Question: Which of the following mobile / tablet applications have you used in the past month?
Source: GlobalWebIndex Q1 2014 - Q4 2014 // **Base:** Internet Users aged 16-64, exc. China



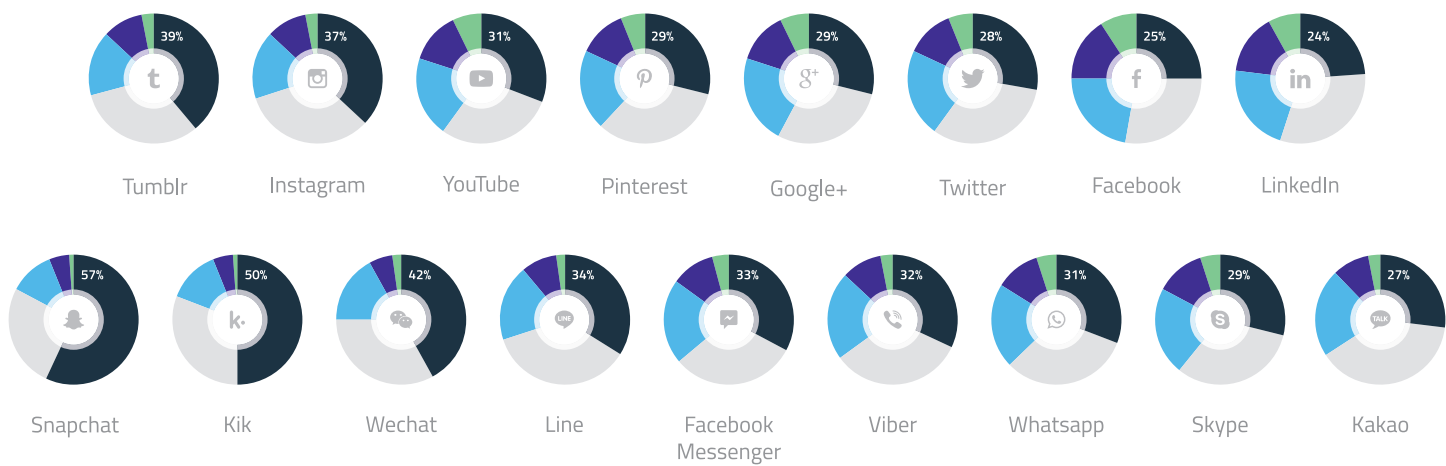
Want to explore this data on the PRO Platform? Enter "Applications" in the free search box or click *Apps > Specific Applications > Specific Applications Used*. Alternatively, you can download our pre-cut "Mobile Apps Active Usage: Named Apps" data pack

16-24s HAVE FOMO, 55-64s JUST WANT TO KEEP UP

■ In terms of social networking motivations, **16-24s over-index the most for following celebrities, for the fear-of-missing-out and for finding content.** This helps to explain why Tumblr has the youngest audience of all the major networks, and why Pinterest has seen a rise of 90% in active usage among 16-24s.

■ In contrast, 55-64s are ahead for using networks out of habit and because lots of their friends use them too. Hence Facebook is the second-oldest network of all in terms of the age profile of its active users, and saw the smallest decrease in active usage among the oldest age group.

ACTIVE USERS OF THE TOP SOCIAL PLATFORMS, BY AGE



Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/laptop, mobile phone, tablet, etc. // **Source:** GlobalWebIndex Q4 2014 // **Base:** Active social network and active app users aged 16-64, exc. China

Want to explore this data on the PRO Platform? Enter "Account" or "Active" in the free search box, or click *Social Media > Social Platforms > Account Ownership / Active User.*

SOCIAL NETWORKING MOTIVATIONS: BIGGEST OVER-INDEXES

| | | | |
|--------------|---|--------------|---|
| 16-24 | To follow celebrities / celebrity news | 35-44 | To promote my work |
| | To make sure I don't miss out on anything | | To network for work |
| | To find funny or entertaining content | | To stay up to date with news and current events |
| 25-34 | To share details of what I'm doing in my daily life | 45-54 | To stay in touch with what my friends are doing |
| | To promote my work | | General networking with other people |
| | To network for work | | Because a lot of my friends are on it |
| | | 55-64 | To stay in touch with what my friends are doing |
| | | | Because a lot of my friends are on it |
| | | | It's just one of the sites I always tend to visit |

Question: What are you main reasons for using social networking services? // **Source:** GlobalWebIndex Q4 2014 // **Base:** Social networkers aged 16-64, exc. China

Want to explore this data on the PRO Platform? Enter "Motivations" in the free search box, or click *Social Media > Social Network Services > Motivations to use a Social Network*



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