

Social

Behind the screens

GWI.

2023 trends report



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Methodology & definitions

All figures in this report are drawn from GWI's online research among internet users aged 16-64 or 16+. Our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle East and Africa, and the Asia-Pacific region, low internet penetration rates can mean that online populations are more young, urban, affluent, and educated than the total population.

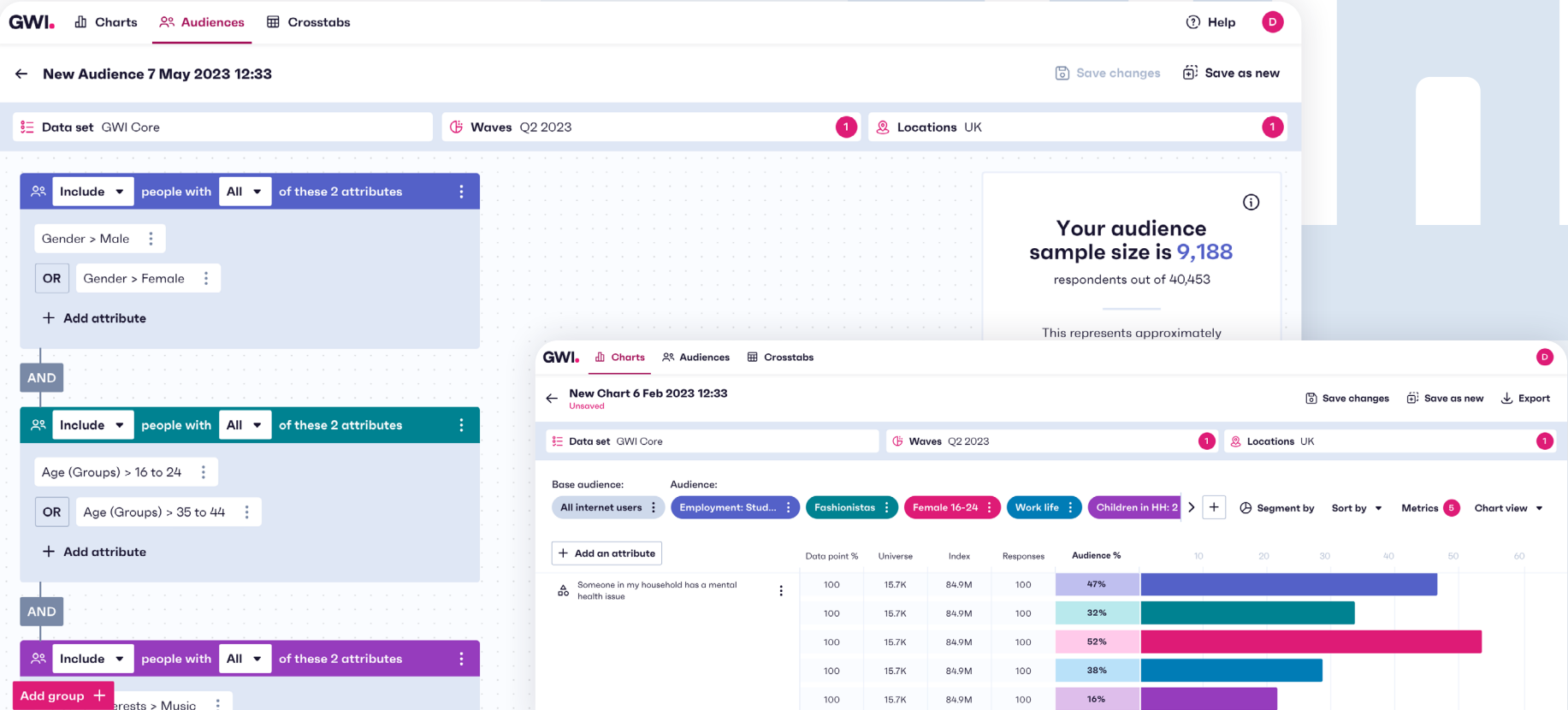
Each year, GWI interviews over 950,000 internet users aged 16-64 in 52 countries via an online questionnaire for our Core data set. A proportion of respondents complete a shorter version of this survey via mobile; hence the sample sizes presented in the charts may differ as some will include all respondents, and

others will include only respondents who completed GWI's Core survey via PC/laptop/tablet.

When reading this report, please note that we use a mixture of data from our ongoing global quarterly research, GWI USA, GWI Work, GWI Zeitgeist, GWI Custom, and GWI Kids. GWI USA is a quarterly online study among internet users aged 16+ in the US, representing Americans across all 50 states. GWI Work is our B2B data set that gives us a detailed view into the lives of business professionals across 18 markets. GWI Zeitgeist is a monthly recontact study of Core that we carry out in 12 markets. GWI Custom is a recontact study that we carry out in the US and UK only. And GWI Kids represents 8-15 year-old internet users in 18 markets.

Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyper-link that will bring you straight to the relevant question on our platform, where you can investigate all data by demographics, over time, and among your own audiences.



1 Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report

Just **click** this icon to explore the data on the platform

Source Information about the source and base

Base

Key insights

Daily social media usage hits a ceiling globally

Since the pandemic peak, average daily time spent on social media has leveled off or declined across most regions. Only North America's figures go against the grain, with usage continuing to rise here. Baby boomers are also an outlier, which is another reason why brands should keep them in mind during strategy discussions.

WhatsApp is the “favorite”, but TikTok is chasing

WhatsApp retains its position as the world's favorite platform, but rarely gets the attention it deserves. Meanwhile, TikTok's growth shows no signs of slowing, with the number of consumers saying it's their top pick doubling in the last two years. It's very important for brands to know which platforms are trending, but also be aware of platform usage overlaps, which remind us that it's the quality of their engagement that matters.

Reasons for logging on are changing in the West

The way Western consumers see social media and engage with certain platforms is shifting. The number of Western TikTokers saying they use the platform to keep up-to-date with the news has jumped by 41% in two years, while more turn to it for information about products and brands (+52%). Platform use cases aren't static, so it's key for brands to stay on top of consumers' perceptions in relevant markets.

Video and audio are king

Over the last year, the number of social media users who watch videos on a range of platforms has grown. Other audio formats are gaining traction too, with Gen Z embracing voice notes. Brands might benefit from including more audio formats in their marketing, such as an informative video on social media or the ability to provide customer feedback via a voice note.

Social media is a key tool for discovery

How we discover new brands and products is constantly evolving, and now more Gen Z say they find products on social media than on search engines, and millennials aren't far behind. With consumers preferring product discovery to happen more organically online, brands should aim to keep up with what's culturally important to their target audience, and the questions they're asking.

01

Time spent on social media



Time spent on social media has hit a ceiling

Of the 48 markets we’ve tracked since Q1 2022, users’ daily time spent on social media decreased in 36. This is only the second time we’ve seen global usage drop year-on-year since we started tracking it in 2012, with average daily usage in Q1 2023 also falling below that of 2019.

These shifts suggest that time spent on social media has reached a ceiling. While we see more drastic fluctuations in emerging regions like the Middle East & Africa, no other regions’ daily use has

changed by more than 6 minutes in either direction in any given wave over the past 3 years. North America is the only outlier, with usage continuing to tick upward past its lockdown peak.

Overall though, it’s fair to say the pandemic-induced boom has largely leveled out. The key takeaway for brands and businesses is that changes are less about how long online consumers spend on social media, and more about how and where they’re choosing to spend their time.

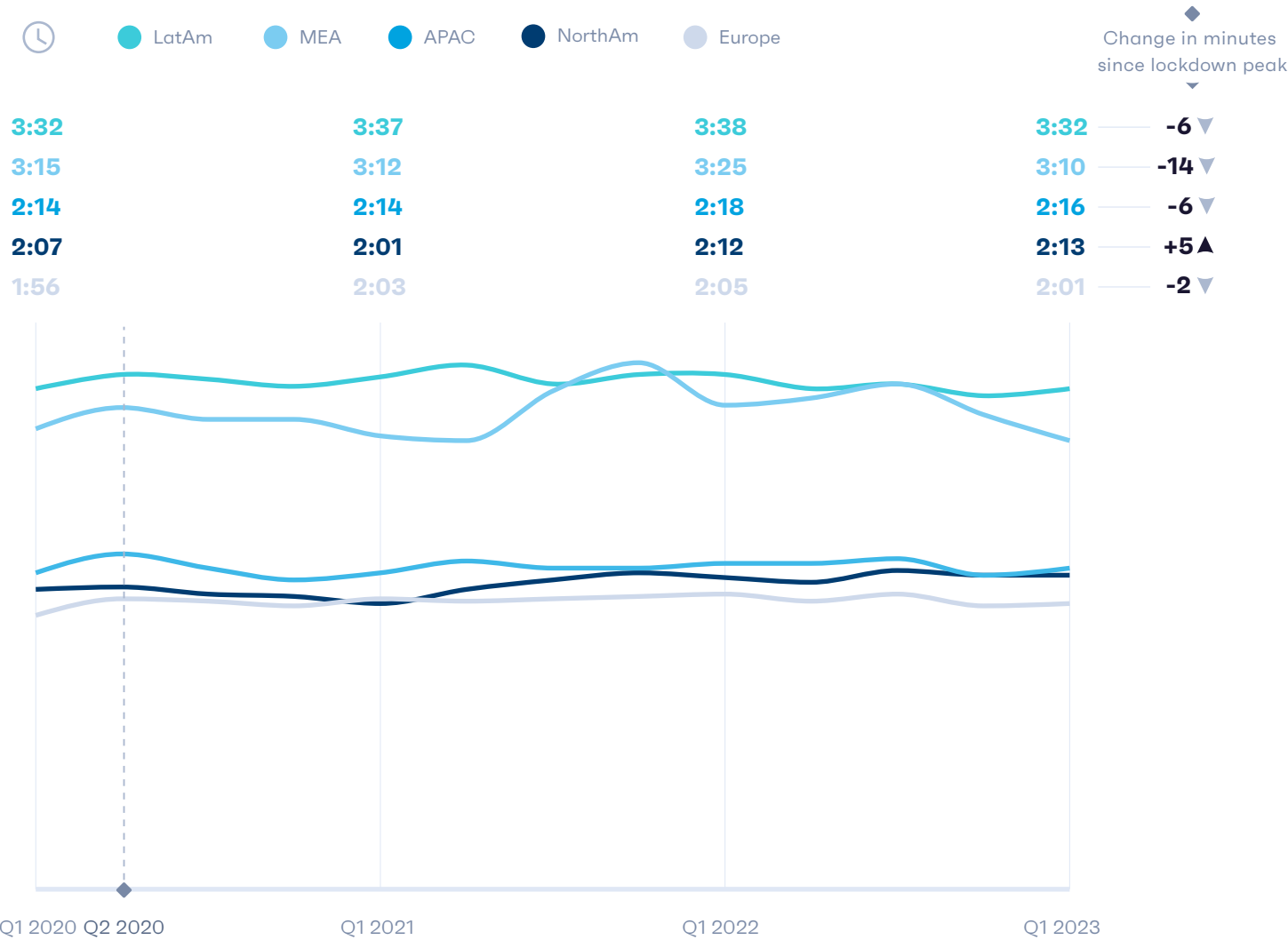
The world wide ebb: Has social media, and the internet as a whole, reached a tipping point?



Download report

Usage has peaked across most world regions

Average time spent using social networks per day in h:mm (by region)

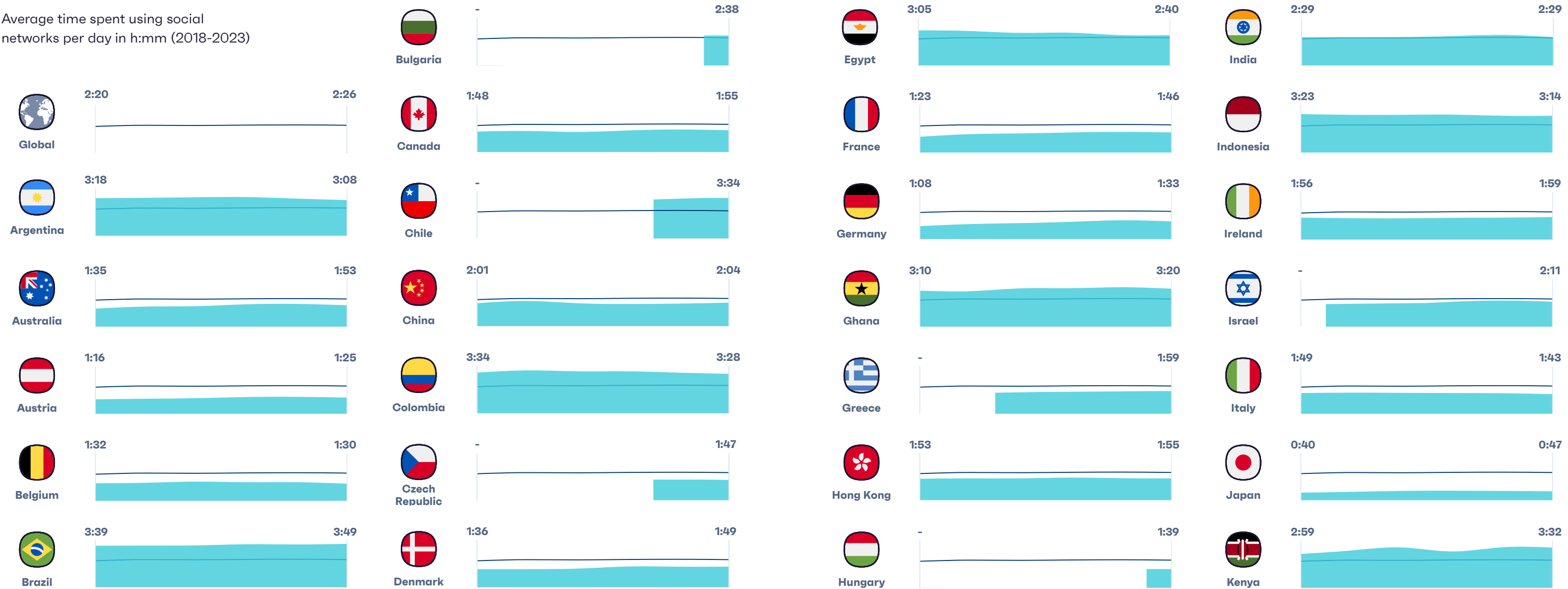


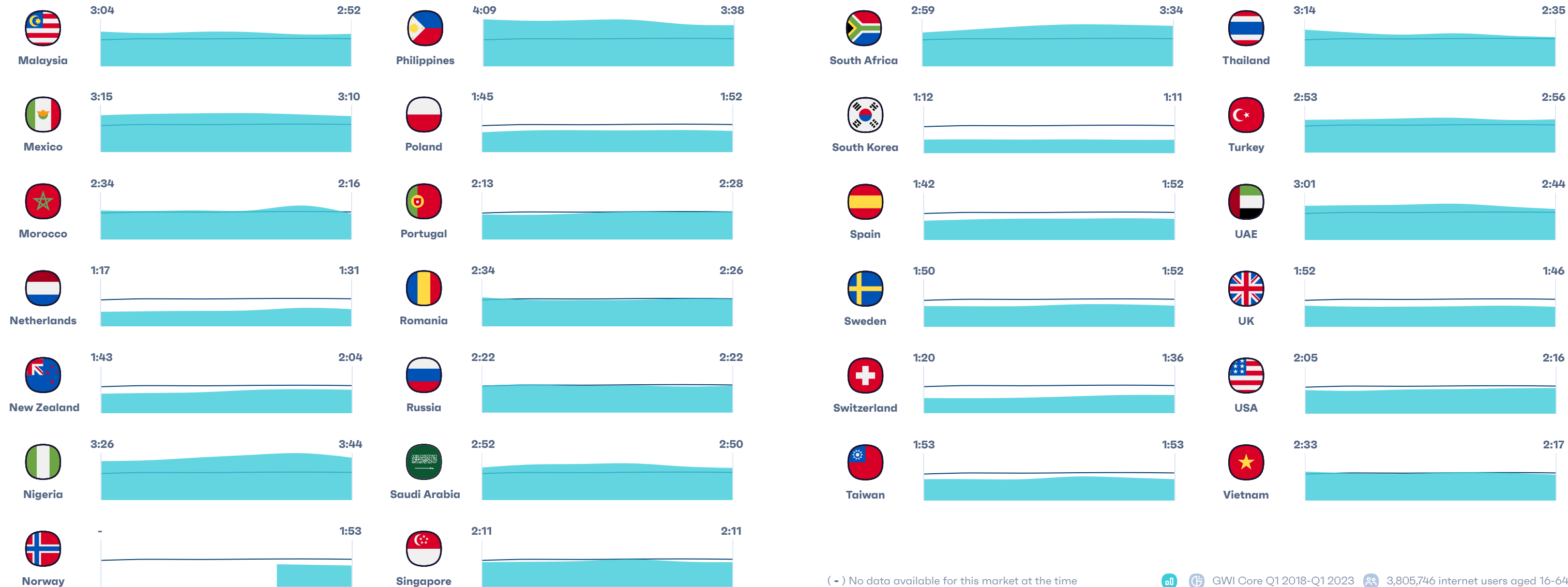
GWII Core Q1 2020-Q1 2023 2,732,988 internet users aged 16-64



Daily time spent on social media by market

Average time spent using social networks per day in h:mm (2018-2023)





The number of baby boomers saying they follow influencers has risen by 12% since Q1 2021



The social and mobile boom(er)

While other generations' social media use has shown signs of reaching a ceiling, baby boomers are telling us a different story. Regional lockdowns and isolation created barriers that pushed many baby boomers to increase their time on social and mobile. They were forced to play “digital catch-up” to remain connected with family and friends and get their basic essentials, among other things. But years on, instead of their usage returning to pre-pandemic levels, their time spent on both social media and mobile has continued to rise. This shows us just how sticky their digital behaviors have become – it wasn’t just a lockdown fad.

Keeping in touch with friends and family is their stand out reason for using social media, but since 2021, more baby boomers are turning to social platforms to watch sports (+9%), find products to purchase (+8%), follow celebrities (+7%), and watch livestreams (+5%). While many still have a lingering unease with online networks over privacy, others are starting to look to social media for the same reasons as younger users. For brands and marketers, it’s important to ditch stereotypes around older consumers’ digital behaviors and meet them where they’re at.

Baby boomers’ online usage sees the biggest growth

Average time that each generation spends using the following per day in h:mm



GW I Core Q1 2020-2023 202,877 Gen Z born between 1997-2007 and 61,927 baby boomers born between 1959-1963

Swapping URL for IRL

Across every region worldwide, Gen Z spend more time on social media than their older counterparts – an average of 2h 51 mins everyday. While they’re unlikely to be knocked off the top spot, some are looking to cut down on their time online and spend it in the real world.

In 2023, Gen Z are 30% more likely to worry about the amount of time they spend on social media, and these feelings are translating into **actual behaviors**. In the US, a third are now actively trying to limit their time on social media, and their fear of missing out (FOMO) is creeping down. Plus, Gen Z are the only generation whose daily time on social media has fallen since Q1 2021.

Key years of their youth were disrupted by the pandemic and it had a noticeable impact on their lifestyle. As of Q1 2023, Gen Z are the least likely

to describe themselves as social or outgoing (37% vs 41% of older generations). To make up for this, some are on a path of self-discovery; nearly 2 in 3 say they’re seeking out new activities/hobbies compared to 2019, and nearly half are making more of an effort to build new friendships/relationships. Platforms are well-aware of this, offering users insight into their time online or nudging them to take breaks – even TikTok has no problem **reminding users to snooze**.

And this trend has no end in sight. Since 2021, talking to friends online on weekends has dropped 13% among 12-15s, while seeing friends in-person has increased by 28%. Content has always been “something to talk about”, but it’s possible that the modern “network effect” of platforms is more about having a common talking point in real life (IRL), with sites like TikTok **driving young people** to pursue passions like reading.

“

Pinterest’s mission is to bring everyone the inspiration to create a life they love. We not only allow, but encourage users to put down their phones and bring their ideas to life, because we believe that time well spent online enhances your life IRL.

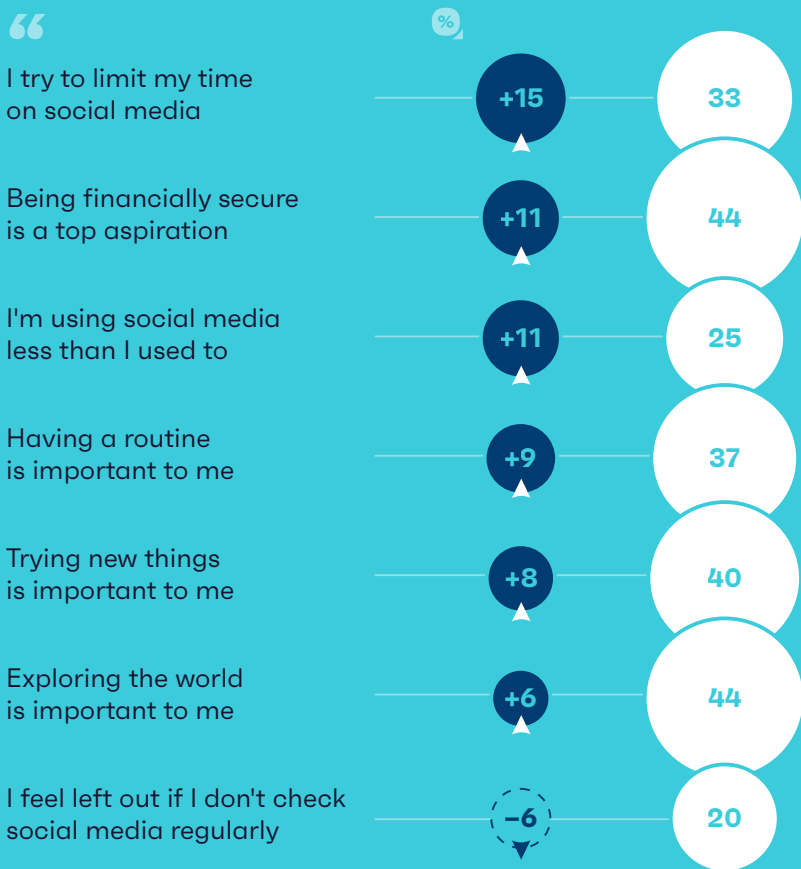


DARON SHARPS,
Pinterest, Global thought
leadership research lead

Gen Z have become more focused on real-world goals

% of Gen Z social media users in the US who say the following (sorted by % change)

● % change since Q1 2022 ● Q1 2023



GW
GW
GW

GW USA Q1 2022 & Q1 2023

7,020 US Gen Z social media users born between 1997-2007

How different generations see social media

5

% of social media users in each generation who say the following are their main reasons for using platforms

%	Gen Z	Millennials	Gen X	Baby boomers
Keeping in touch with friends/family	46	49	55	60
Filling spare time	42	38	36	34
Finding content (e.g. articles, shows, videos, memes, etc)	34	31	28	24
Seeing what's trending/what's being talked about	32	30	27	22
Reading news stories	31	36	39	41
Finding inspiration (e.g. places to visit, things to buy, etc)	29	28	26	22
Finding products to purchase	25	28	27	25
Following celebrities or influencers	25	22	16	12
Making new contacts	24	24	21	17
Seeing updates/content from your favorite brands	24	25	21	15
Watching live streams (e.g. events, shows, etc)	24	25	22	18
Watching/following sports	24	24	21	18
Avoiding missing out on things	23	21	17	15
Sharing/discussing opinions with others	23	25	23	23
Posting about your life (e.g. food, pets, vacations, etc)	21	22	18	15
Work-related networking/research	21	25	22	14
Finding like-minded communities/interest groups	20	21	21	20
Supporting/connecting with good causes	16	16	14	13



Get the scoop on today’s “it” consumer with our latest Gen Z report



Download report

More Gen Z want to see what’s being talked about than read news stories

02

Breaking down the top platforms



Separating hype from reality

People love to read about trending apps, and marketers get very excited by them. It's very useful to track changes, but sometimes the most important story is what's not changing. The media can often overstate things by showing incredibly high growth percentages, rather than how platforms are performing overall.

The first thing to note is Facebook isn't dying out; it's still the most widely used app worldwide and has a lot of staying power among younger consumers. The number of monthly users has dipped slightly since Q4 2020,

and our Work data set shows a drop in the number of business professionals saying their company uses the platform in the last year. But brands should think twice before jumping ship in favor of a hot new platform because it's still incredibly popular.

Next up, WhatsApp is the second biggest platform worldwide, and also one that often doesn't get the attention it deserves. This is partly because it's not as big in the US market, with only 9% of workers here saying their company has a work-related account on the app. Brands, especially international ones,

are benefiting from **experimenting on** WhatsApp - creating community groups, offering one-on-one consultations, and sending promotional blasts to subscribers.

Another thing that can pull focus is short-form content. It's a huge trend, but interestingly, it's not at the expense of longer content. While 45% of consumers are on TikTok, 67% are on YouTube. Not only that, but Instagram Live can last up to four hours, and Reels are **getting longer** too. The point is that things don't just move in one direction, and it's useful to vary up content length.

Despite increased competition, Facebook still leads the pack

% outside China who say they've used or visited the following platforms in the past week | Low High



GWJ Core Q1 2023 216,646 internet users outside China aged 16-64

WhatsApp is the world’s “favorite”

Consumers’ list of favorite platforms also points to the dominance of WhatsApp, which has held the top position for another year running. WhatsApp is especially popular among older groups, so it’s wrong to assume that companies with young target audiences are the only ones that stand to benefit from reaching out to customers on this platform.

On the other hand, Instagram is the favorite among Gen Z by a significant margin. Like we noted with Facebook, new players aren’t diminishing its popularity; it’s still very much at the heart of their social media experience.

TikTok has continued to gain more appeal over time. And while Gen Z are by far the most likely to say it’s

their favorite app, the number of baby boomers who list it as their top pick has more than doubled since 2021. According to Dr Reuben Ng, the author of “Not Too Old for TikTok”, an **increasing number of accounts** belong to users aged 60 and older with millions of followers – creators who are using the platform to defy ageist stereotypes.

It’s ultimately important to know which platforms resonate with a target audience, rather than jumping to conclusions. Each audience is unique and worth exploring, and our generational analysis shows why it’s worth taking the time to dissect this. Contrary to what we might expect, WhatsApp has strong appeal across the board, with TikTok’s likeability increasing among both younger and older groups.

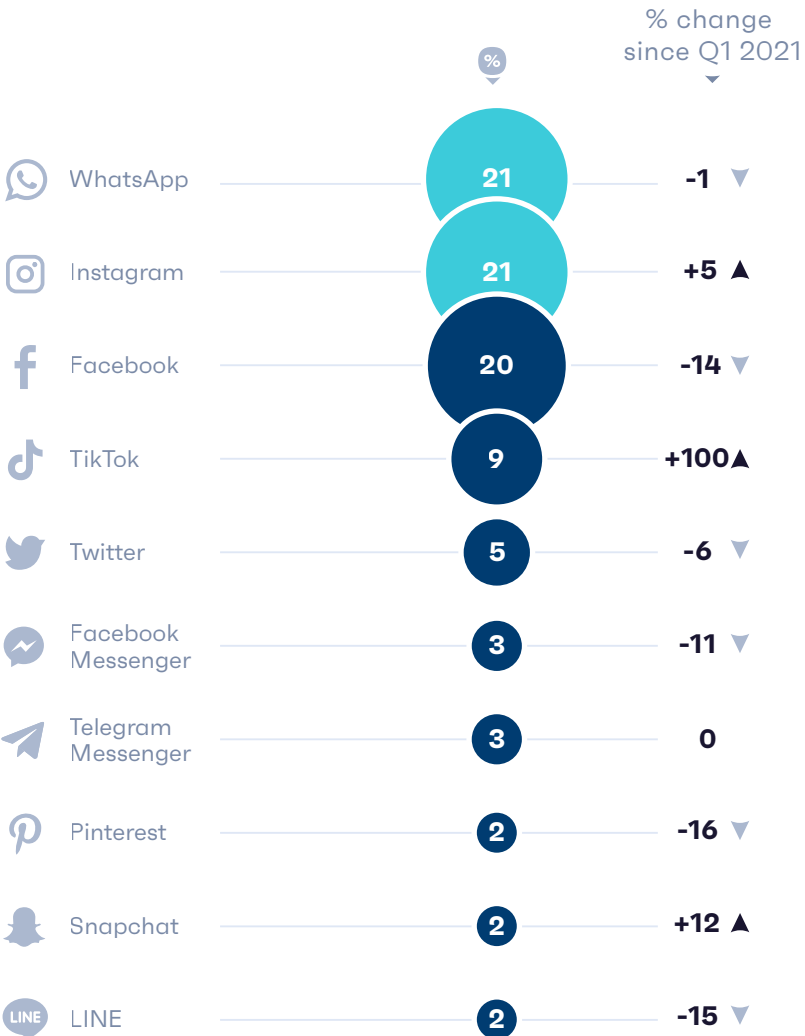


WhatsApp and Instagram remain fan favorites



% of social media users outside of China who say the following is their favorite platform

7



GWII Core Q1 2021 & Q1 2023



350,083 social media users outside China aged 16-64



Why social media overlaps are important

As we've pointed out, marketers with limited budgets often feel FOMO when there's a shiny new platform on the scene. And here, we're going to offer another reason why they shouldn't: platform usage overlaps.

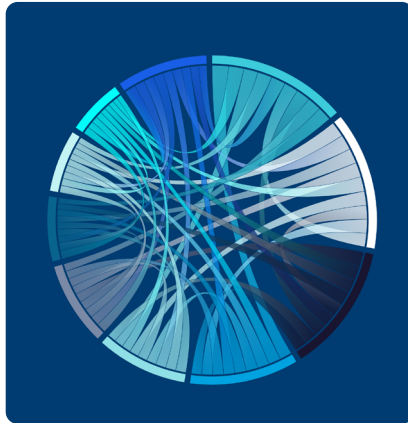
People have multiple accounts that they log into regularly. On average, Gen Z and millennials use over 6 social media and messaging apps monthly (6.7 and 6.5, respectively), Gen X use 5.8, and baby boomers, 4.9.

Generally speaking, SMEs don't need to get worked up over the quantity of platforms they use as no newcomer has an isolated audience. For example, 7 in 10 BeReal users are also on Facebook. More importantly, brands should be selective in their choices, considering how their communication strategy and tone of voice suits each platform to get the most out of their social media engagement. It's not the quantity of their interactions that matters, it's the quality. The best tried-and-tested approach is to tell a well-adapted story across a few key platforms, rather than blasting the same creative across every channel.

8

Example

Interactive graph



For a better reading experience try our full interactive graph

f Facebook



Instagram



 **Facebook Messenger**



 Telegram Messenger



Snapchat

in LinkedIn

 Twitter

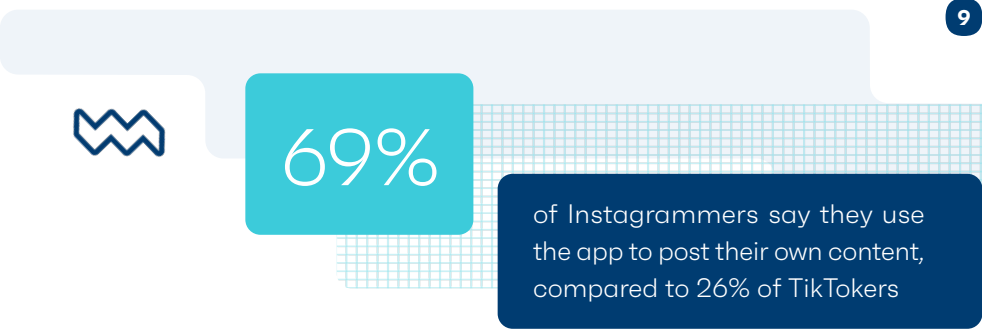
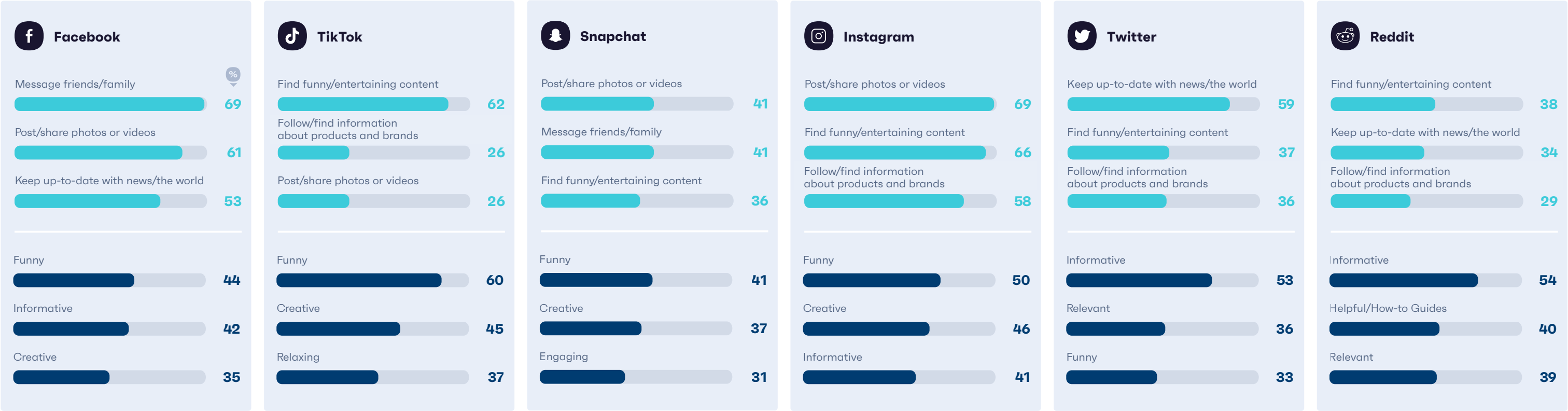
f	i	wh	wa	d	g	p	s	i	t
-	82	81	95	83	81	81	83	87	83
78	-	80	80	81	84	86	88	84	88
73	76	-	72	73	86	78	80	82	76
70	62	59	-	67	63	66	68	70	65
51	52	50	56	-	56	60	59	52	59
43	48	51	46	48	-	52	53	57	55
32	37	35	36	39	39	-	44	49	40
32	36	34	36	37	38	42	-	41	40
29	30	31	32	29	36	41	36	-	39
47	53	48	51	55	59	57	58	65	-

Each platform's USP

The social fabric of the top performing platforms

% of users of each social platform who say they mainly use it for the following reasons/want to see the following type of content on the app

Top 3 use cases for each platform The content users most want to see on there



03

Differences between markets



Getting to grips with China

Even though many social platforms struggle **to get going** in China, it's a great place for brands to get stuck in, with big names like **Chanel**, **Nike**, and **Gucci** making it work. Here are the latest must-knows on China's unique social media landscape.

WeChat, China's go-to **super app**, is still the most popular overall. In 2021, we noticed the gap between WeChat

and its competitors starting to close, but it's managed to hold strong. The platform **apparently saw** a 23% boom during Chinese New Year, and 9x more consultations on its "WeChat customer service" feature since 2022. Our data shows 80% of Chinese WeChatters use WeChat Pay monthly, 61% scan a QR code on the app, and 42% use its Mini Programs to access third-party sites.

But WeChat isn't the only platform that's rising. Xiaohongshu - known as Little Red Book or "RED" internationally - is a social ecommerce app that allows users to discover and share product reviews, recommendations, and experiences. Brands have been **betting big on** the platform, and it's easy to see why. The number of consumers saying they use it daily has risen

faster than WeChat or Douyin since 2021. Its popularity has also ballooned among China's Gen Z, with the number saying they use it daily growing 25% in this time frame. RED was initially focused on female beauty products. And like Discord's relationship to the gaming sector, its roots are still very visible. RED's audience skews toward young

women, who are more likely to say they use social media to find products and follow beauty experts. But 48% of its user base is male, and this audience has a wide variety of interests like film, fashion, and fitness. RED is now **the go-to app** for lifestyle content and shopping, and it's a great channel for brands operating in recovering sectors like travel.

Xiaohongshu has made headway

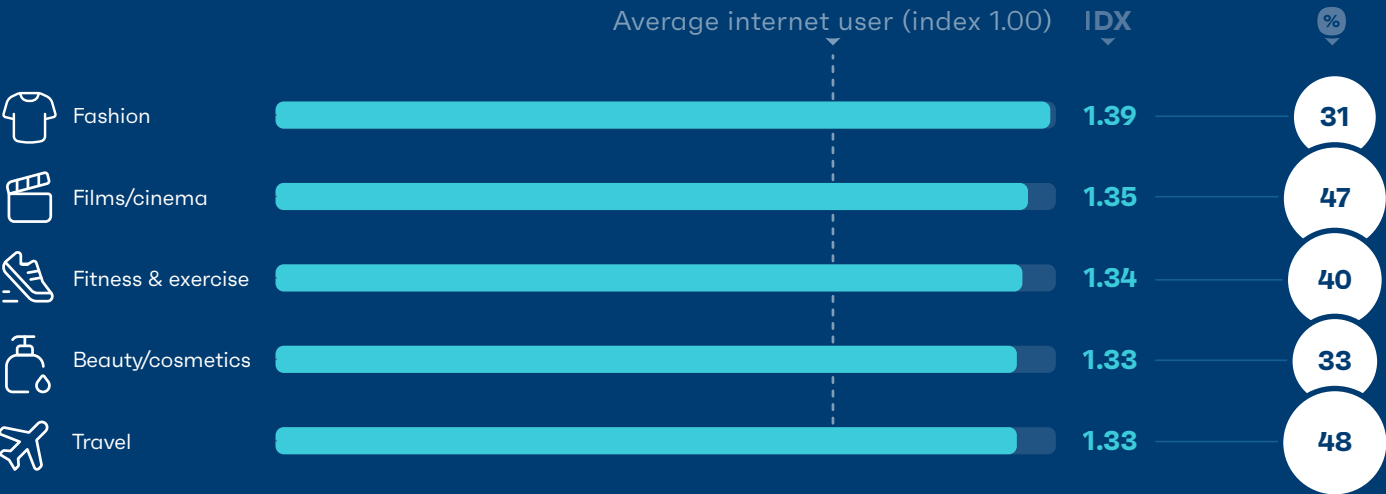
% change in the number of consumers in China who say they use the following platforms daily



GWl Core Q1 2021 & Q1 2023 49,489 Chinese internet users aged 16-64, and 23,953 Xiaohongshu (RED) users

...and has a lot of room to grow

Xiaohongshu (RED) users' top over-indexing interests, compared to other Chinese consumers



The global media landscape in 2023: Understand the media consumer of today



Download report

Compared to Q1 2021, there's been a rise in North Americans saying they use social to:



Engage with content
+11%



Find inspiration
+10%



Watch sports
+10%



How Western consumers use social platforms is changing

Compared to people in emerging markets, those in the West are more set in their social media ways. North Americans' most distinctive reasons for using platforms are keeping in touch, posting about their lives, and filling up spare time. In APAC, on the other hand, watching livestreams is the most stand out motivation, while finding products is top among Latin Americans. Still, we've noticed changes over time. Like baby boomers, Western consumers are starting to use social media for a wider variety of reasons and expanding their use cases for different sites.

We pointed out that each app has its own niche but the way consumers see and use social platforms isn't fixed, even in mature markets. The number of Western TikTokers saying they use the site to keep up-to-date with the news has risen by 41% in the last two years, alongside using it to find information about products and brands (+52%). And it's not just newer apps like TikTok.

On Instagram, the balance is shifting away from personal sharing and more toward entertainment. In the

US, the number of Instagram users watching or uploading Reels has risen by 46% since Q1 2021, overtaking the percentage creating stories in 2022.

And we can see similar things happening on Twitter. Since February 2022, Western Twitter users have slightly different expectations around what they'd like to see on the platform. The biggest climber is exciting material, with demand for inspirational tweets dropping the most. While informative, relevant content is still their top priority, it's likely that many will rethink their relationship with the app as it evolves. Elon Musk has **noted that** video is a primary focus going forward, with NBCUniversal's current head of advertising Linda Yaccarino reportedly set to take over as CEO. It's possible that more video and exclusive content will change the fabric of the app.

It's key for brands to keep track of consumers' perceptions, especially in the markets they operate in, as they affect what consumers expect and seek out in these spaces.

Some markets seek anonymity more than others

Partly because they don't want their whole lives to **be on display**, and partly because of concerns around personal privacy, many consumers prefer to set some or all of their social media profiles to private. This is especially true in certain APAC and Western markets, with 41% of Singaporeans saying they'd rather be anonymous online. We also see this pattern among younger groups. Since Q1 2021, there's been a 17% drop in the number of 12-15 year old social media users saying they post everything they do, rising to 23% in Australia, and 30% in Malaysia. So, this trend seems to be sticking around.

Brands rely heavily on user data from social media platforms to gather insights about their target audience, track trends, and personalize their marketing strategies. When accounts are set to private, brands may have limited or no access to this valuable data, making it harder for them to understand their customers and tailor their marketing efforts effectively. This is where detailed audience profiles can help. Brands, particularly those in markets where anonymity is favored, will also need to focus on building trust and fostering authentic relationships to compensate for this growing preference.

There's been a **24%** rise in Indonesians saying they prefer to be anonymous online since Q1 2021

Privacy is more in demand in certain markets

11

% in each market who say they would prefer to set all their accounts to private



#community driver



Turning authenticity into brand love

By Rob Gaige

When makeup-free selfies became popular as far back as 2017, it felt like a new wave of authenticity. At last, people showing who they really are! But on Reddit, the concept of authenticity goes back to our creation in 2005. There's no disputing the performative nature of social media, but amidst that, there exists a counter trend for realness and vulnerability. For every perfectly contoured cheekbone, there's an acne-ridden closeup. For every perfect family photo, there's a story of fertility struggles.

So how does a brand navigate this? How do you lean in to authenticity without overstepping? When do you present your best self and when do you open yourself to a harsher light?

First, believe in something—anything! On Reddit, our 100,000+ communities

are deep and passionate, and they're excited when brands love what they love as much as they do. Don't posture or pretend, truly love it. When you have conviction, you can't fake it.

Second, listen to the community. You are their guest. Participate. Don't dominate. Ask for their opinions! And yes, not everyone will agree with you, but isn't there significantly more value in receiving real feedback than in constantly fighting for the attention of the uninterested?

Finally, remember this isn't about you. This is about a passion you and the community share for a topic. Resist the temptation to bring everything back to your brand or your proof points. Stay in the moment and geek out with them. That's how you turn authenticity into brand love.



ROB GAIGE,
Reddit, Director
of global insights

04

Navigating the latest behavioral trends



“

Videos have grown in popularity among social media users, with the number of platform users who watch videos increasing 5% since Q1 2021 across a range of platforms as per GWI data. Internally, we have seen quarter-on-quarter growth of Snapchat’s daily users and our work over the past 3 years has revealed that Snapchatters are paying more attention to video and this includes both branded content or ads on the platform. Our work with Amplified Intelligence and OMD showed that brands can deliver purpose-driven messages and get audiences to pay twice as much active attention to ads on Snapchat than other platforms, land their message, and drive impact.



AARTI BHASKARAN,
Snap Inc., Head of global
ad research & insights



The power of social videos

Videos are becoming more and more popular in the eyes of social media scrollers. For viewers, the growth of short-form video means it’s easier to digest more information on the go - whether that’s news, reviews, or just general entertainment. For brands, this is good news too, as social video is estimated to generate **1200% more shares** than text and image combined. It also allows brands to bring more personality and experiment with their content.

Younger groups are more likely to say they trust online reviews, possibly because they’re more likely to seek out products on vlogs, micro-blogs and video sites, and lean less on traditional search tools. Visual results can be very persuasive as they show real

people and their views - something which is doing wonders for the world of ecommerce.

Seeing people interact with products online is particularly helpful for industries like fashion, where shoppers may not be able to try before they buy and may not want to rely entirely on written reviews. This is where user-generated content (UGC) can be really helpful.

American shapewear and **clothing company Skims** is a good example of this. They post videos of real people showcasing their purchases on their TikTok channel, which is a way for the brand to show off their clothes on real bodies, a move which is likely to build trust among their customers.

#authentic



STEPHEN GRAY,
Meta, Senior business
marketing insights researcher

“

Short-form video consumption continues to rise, especially in younger generations, due to how easy it is to consume and share with others. Brands who want to win with the seemingly elusive Gen Z and Alpha need to learn the language of short-form video and be prepared to test and learn. Creative assets need to be entertaining, relatable, digestible, and most of all - authentic. You don't necessarily need high production value - but you do need to connect with consumers in a way that's aligned with their expectations when watching short-form video.

Video content gains popularity

% change in the number of each platform's users
who say they've watched a video in the last month

12



Instagram users

+8 ▲



Twitter users

+7 ▲



Facebook users

+6 ▲



Snapchat users

+6 ▲



Reddit users

+5 ▲



GWJ Core Q1 2021 & Q1 2023

290,534 Facebook users, 256,751 Instagram users, 155,327 Twitter users, 53,571 Reddit users and 102,595 Snapchat users aged 16-64

Voice notes: embracing audio in a texting era

While videos are growing in popularity, other audio formats are gaining traction too. Younger generations have often been criticized by their older counterparts for not picking up the phone for a call, and relying on text too much.

There might be some truth to this: Gen Z in the US and UK are the least likely of all generations to make a voice call, but they're the generation most likely to send voice notes at least daily - 28% more likely than older generations.

It seems many feel that texting can muddle the meaning behind a message, perhaps something we can all identify with, while calls trigger anxiety for some. Voice notes, on the other hand, offer an easier, low pressure alternative in a world that's growing more familiar with different audio formats. It's something which likely started growing in popularity during lockdowns, and has gained momentum since.

Tech fatigue is likely another reason why phone calls are losing their luster among younger generations, with traditional calls increasingly seen as a work-related activity. In addition to that, the saturated media landscape is feeding into this feeling of overwhelm - people's attention is spread very thinly. Voice notes have appeal because they don't require individuals to carve out time to be on the phone, and in the fast-paced world we live in today, it's no wonder it's an attractive option.

For brands, it's key to adapt to changing communication preferences and leverage the power of audio. This may be incorporating audio formats into their social media presence or content. It may also come in the form of allowing customers to ask queries or provide feedback in the form of a voice note - a way of catering to the fast-paced nature of modern life.

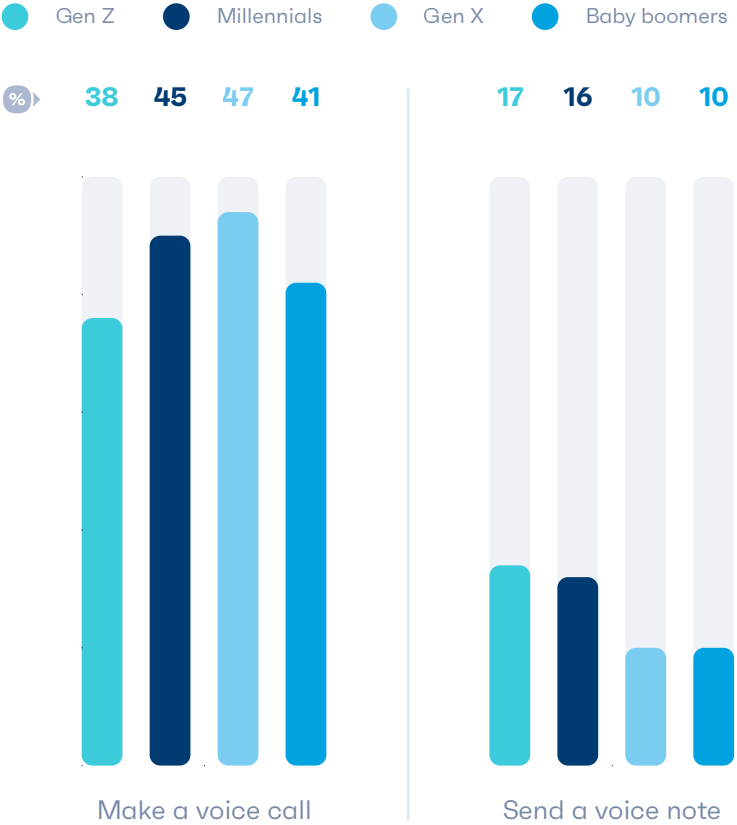
Gen Z are 28% more likely than older generations to send voice notes daily



Voice notes have more appeal for younger generations

13

% who do the following at least daily



GWl Custom December 2022
3,021 internet users in UK and US aged 16-64

Unlocking the power of content creators

Social media is a big way for budding artists and creators to get their work out there and start to build a following. The number who consider themselves an audio creator or have shared their own blog or video in the past week is relatively high. This proportion climbs further if we look at Gen Z and millennials, who are more likely than their older counterparts to branch into the creator economy.

Content creators **differ** from influencers - while influencers are social media personalities who influence their followers to do or buy something, content creators create and distribute their own content. Many established creators have built up an audience of engaged followers, which can be **handy** for brands who are looking to reach a specific audience.

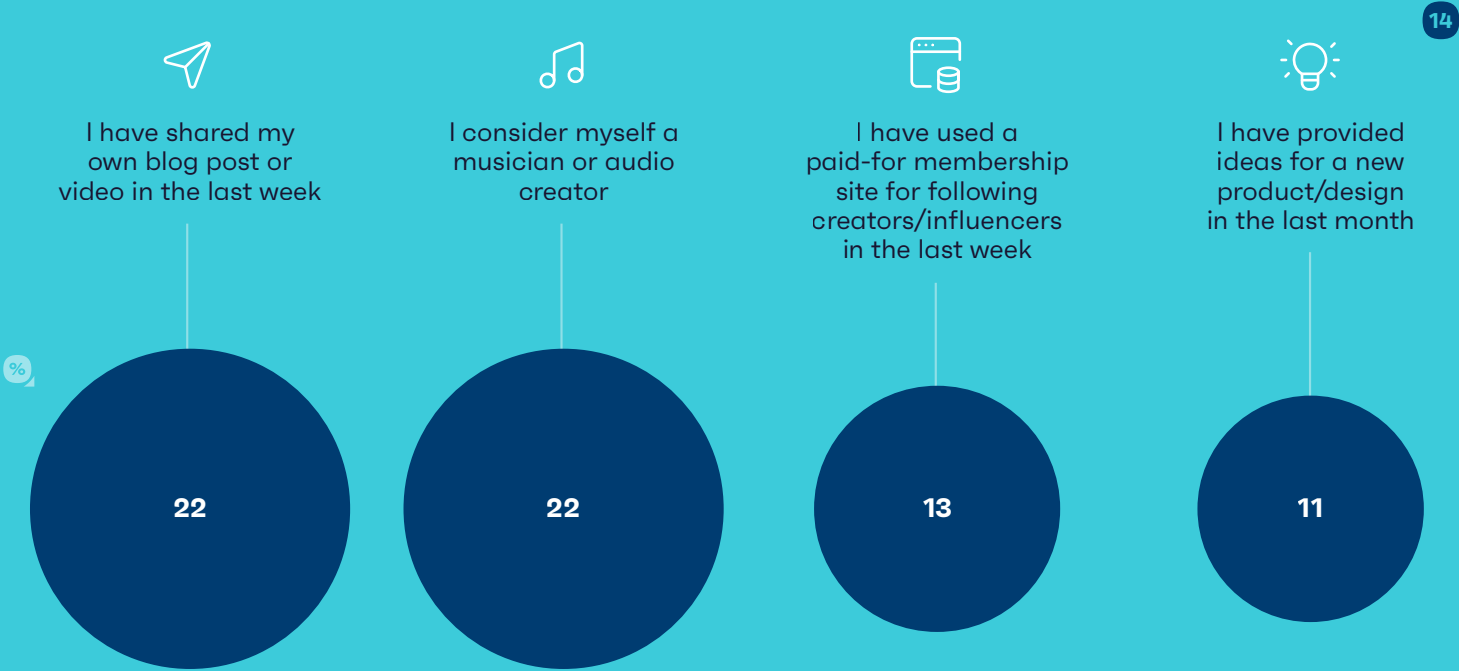
Content creators have worked hard to separate themselves from influencers, so they can often be seen as more **authentic and trustworthy**, which is pretty key at the moment.

As a result, many followers want to support creators in their work – 17% say they pay for a regular subscription, while 14% say they send a virtual tip. Social platforms like **TikTok**, **YouTube** and **Instagram** have recently made it easier for fans to tip their favorite creators.

For brands, this highlights a potential opportunity - consumers are clearly willing to pay for content they value and support. Brands could offer subscriptions or enable fans to send virtual tips to support favorite creators, which could create new revenue streams.

Content creators come in all forms

% of Gen Z and millennials who say they do the following




 GWI Core Q1 2023
 59,197 Gen Z aged 16-26 and 81,921 millennials aged 27-40



Dipping into AI

ChatGPT has taken the world by storm since its release in November 2022. And artificial intelligence is developing at such a speed that even **Bill Gates** says AI will “change the way people work, learn, travel, get health care, and communicate with each other”, and that “businesses will distinguish themselves by how well they use it.”

This is where Snap noticed a gap in the market. The social media company integrated its own AI **chatbot** powered by ChatGPT into the Snapchat app.

While many have been using ChatGPT to help them with their **productivity**, Snap has implemented the tool into their app, making it look more like a persona and another friend to chat with. This move makes sense too, as 64% of ChatGPT users say they chat to the bot the way they would a live person.

Snapchat says that **My AI** can recommend birthday gift ideas, plan a trip or a weekend, or suggest a recipe for dinner. The bot can also be used

in **conversations with friends**, eliminating the need to leave a chat in the middle of a conversation to check something on Google.

Snap has clearly recognized the demand for it and acted, and once other social media sites incorporate AI into their platforms, they’ll set further expectations for the entire online experience. So retailers should make sure they’re investing in this tech to keep up with the times, which will pay off in the long-run.



Let’s BeReal about social media

As we touched on before, the concept of social media started as a way to keep up with friends - think MySpace, Facebook, and Bebo. But now, usage is evolving, with younger generations going to social media platforms to get advice, research brands, and find interesting content.

But **BeReal** is changing the game. The app prompts users to take two pictures each day, one using the front camera, and the other using the back one. The idea is for the user to snap a picture of whatever they’re doing at the time, along with a selfie showing what they look like, and no filters are allowed.

In our September 2022 **Zeitgeist** research, 42% said they’d be interested in using BeReal, pointing to further growth in the future.

While the news tends to focus more on the authentic side of BeReal, the top 3 **reasons** users give for engaging with it are it’s easy to use, it’s fun, and their friends use it. So, a big string to BeReal’s bow is its usability. The fact that it’s easy to use (and fun) shows how well BeReal has cut through the noise by having one clear feature.

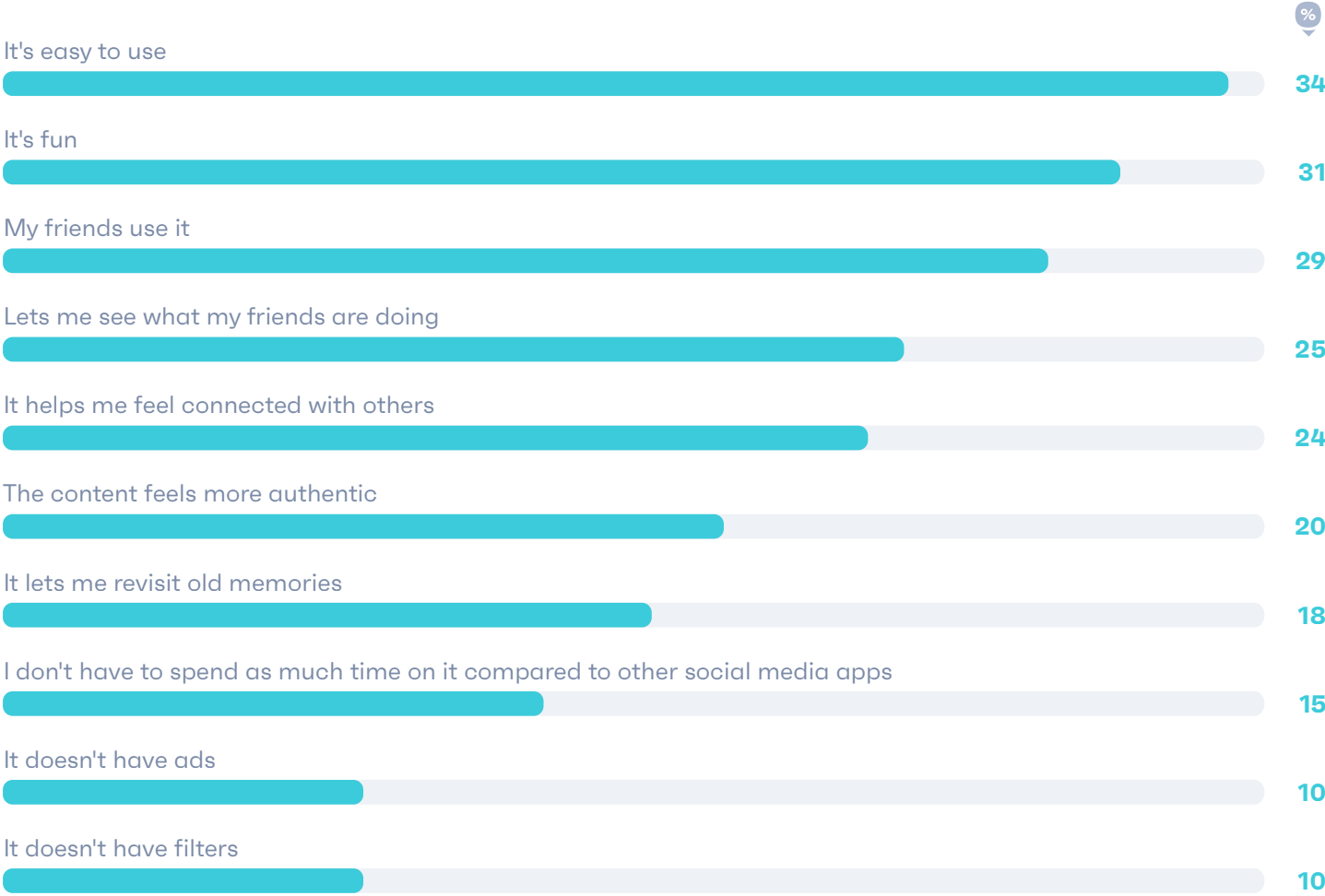
The future for brands on this platform is unclear at the moment, but it could help them build communities with consumers. Beauty brand e.l.f was an **early adopter** of the platform, posting a **mixture** of unfiltered moments at the headquarters, as well as communicating with customers.

There are opportunities within other industries here too, with skincare brands **Kiehl’s** and fast food restaurant **Chipotle** also **joining** the gang on BeReal.

42% say they’d be interested in using BeReal

BeReal isn’t necessarily all about authenticity

% of BeReal users who say they use it for the following



GWJ Zeitgeist September 2022 205 BeReal users aged 16-64 in 12 markets

05

Sizing up social commerce



#shop_new_jacket

#shop_popular_hat



Social media as a discovery tool

Product and brand discovery is evolving. More Gen Z say they discover products on social media than they do on search engines, and millennials aren't far behind.

Social media is also increasingly used as an **inspiration tool**. Since Q1 2019, finding new ideas or inspiration has jumped from 9th to 6th place in reasons for using the internet, overtaking product research in the process. Older consumers have embraced the trend too - among baby boomers "finding products to purchase" as a reason to use social media has jumped from 6th place in Q1 2021 to 4th place in Q1 2023.

It's a shift toward consumers allowing product discovery to happen more organically online, rather than actively seeking out information.

For brands, this means it's key to keep up with what's culturally important to their target audience, and what questions they're asking.

For example, **#QuietLuxury** has been **trending on TikTok**, gaining over 100 million views. The focus is on minimalist styles and a neutral palette, a far cry from the maximalist vibe of the **Y2K era**. The move matches how people are feeling too; only 8% of Americans

say they like to be the center of attention, a 13% drop since Q1 2022. This is likely because people change their style during **economic slowdowns**. When the economy is **unstable**, people don't fancy wearing flashy outfits, and many can't afford them. The trend also extends to **beauty, wellness, and homeware**.

The takeaway here is that social media is becoming as important (if not more in some cases) as search engines for product research. It's also unlikely that we'll change the direction we're headed, especially as younger generations take more control of the narrative.



As seen on social: How are consumers finding products in 2023?



Download report

Almost 3 in 10 Gen Z use social media to find inspiration for things

Where brand discovery happens

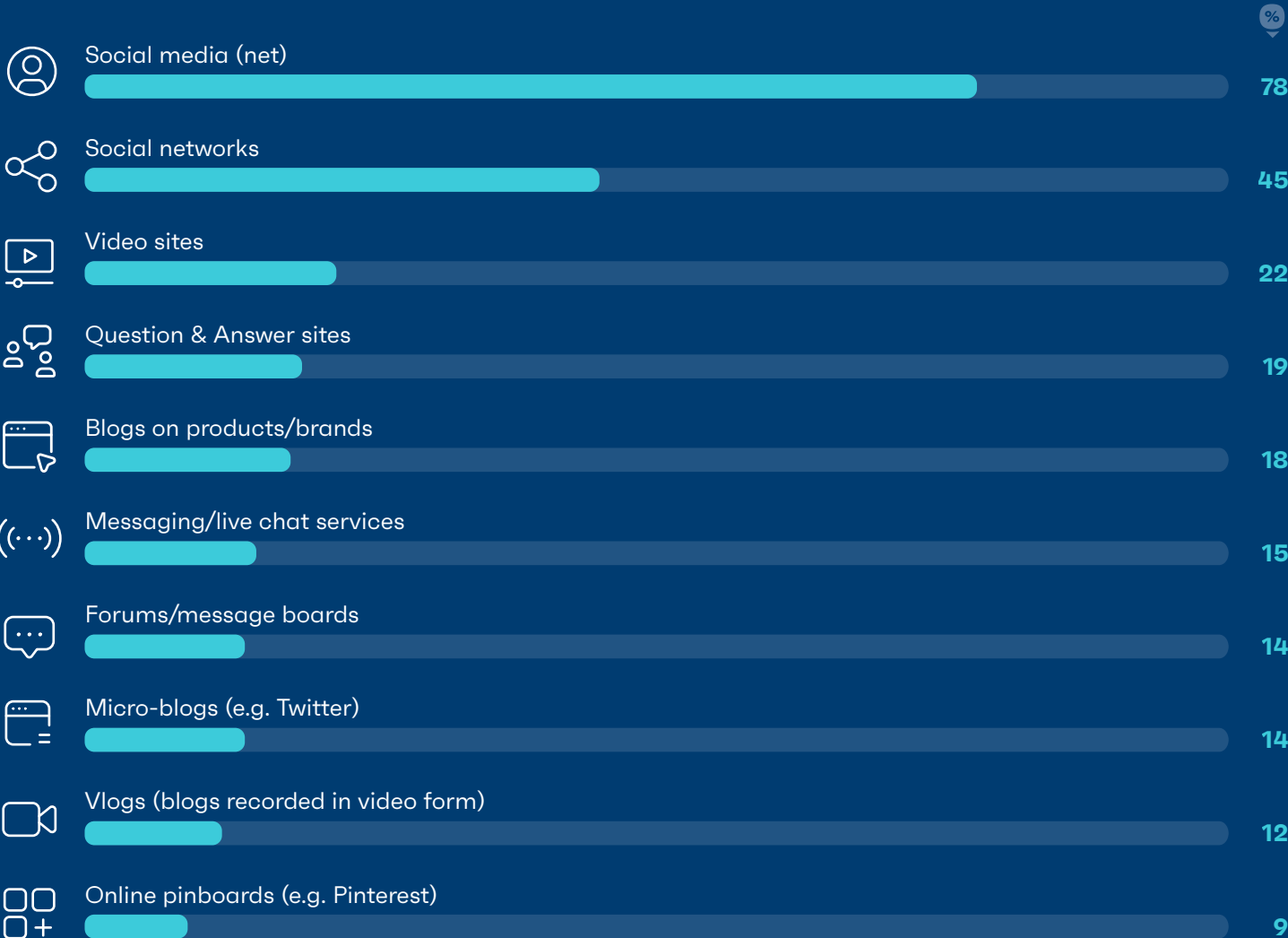
% of internet users who typically find out about new brands/products via the following



GWK GWI Core Q1 2023 241,138 internet users aged 16-64

Research essentials

% of internet users who mainly use the following when looking for more information on brands



The influence of influencers

#Deinfluencing is the name given to social media personalities recommending which hyped products you shouldn't buy, and sometimes suggesting alternatives. The trend initially gained traction due to its focus on more authentic content, and as an antidote to overconsumption but it's also taking hold due to the cost of living crisis - people are growing tired of expensive recommendations. But this means that deinfluencing is still influencing - just with a different slant.

Despite the trend, younger generations still trust brand and product recommendations from influencers, but there's still some way to go with older groups. Brands can still build trust in older generations though, and appeal to younger consumers in the process.

For starters, trust comes with high expectations. Younger generations want to identify with influencers they follow with 56% of Gen Z or millennials saying they follow influencers who have the same beliefs or values as them. So, it's important to consider the audience you're looking to reach when working alongside influencers.

Consumers also have expectations of brands too. If a celebrity or influencer collaborating with a brand did anything offensive, 74% of consumers say the brand should stop working with them immediately. So it's critical to choose partnerships wisely and act quickly.

Authenticity is key here - 53% of consumers say celebrities should only endorse products

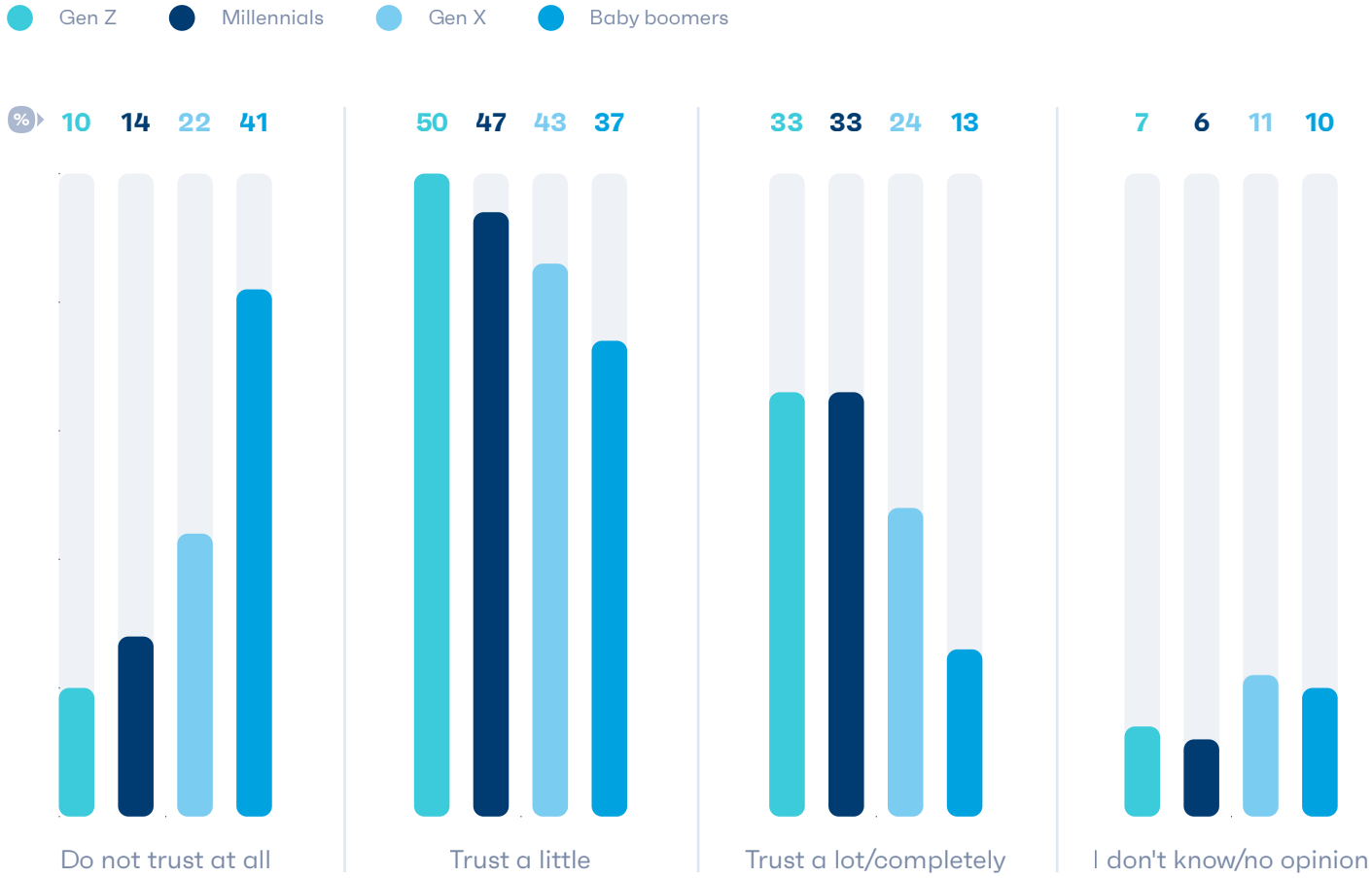
that are relevant to their lifestyle. With the deinfluencing trend gaining traction, authentic partnerships are more important now than they may have been in the past.

As baby boomers are more skeptical when it comes to influencer recommendations, building trust is vital. Older consumers often feel under-represented in advertising. But by featuring older influencers and showcasing diverse body types, brands can not only appeal to older consumers but also meet the demands of younger generations like Gen Z, who value authenticity and inclusivity. This approach can bridge the gap between generations and foster a sense of connection and relatability.



Trust in influencers tapers off with age

% who trust product/brand recommendations made by social media influencers the following amounts



Measuring the influencer impact

% who agree with the following statements (sorted by Gen Z)



Unlocking social shopping

The impact of social shopping varies worldwide, and is evolving continuously. Consumers in Latin America come out on top for clicking on sponsored posts or ads on social media, but social media users in North America are most likely to make in-app purchases. In contrast, social media users in APAC are most likely to use an ad-blocker.

Latin America dominates Facebook Marketplace and Instagram Shopping, but North America shows significant growth, with the number of consumers using either platform growing 16% since Q1 2021.

Bearing this in mind, brands must tailor strategies to different markets. Consumers in

Latin America lead the way when it comes to engagement with sponsored content and are the biggest users of Facebook Marketplace and Instagram Shopping Bag. This region presents an opportunity for brands to drive conversions and sales through social media advertising, so partnering with local influencers and creating culturally relevant content will be key.

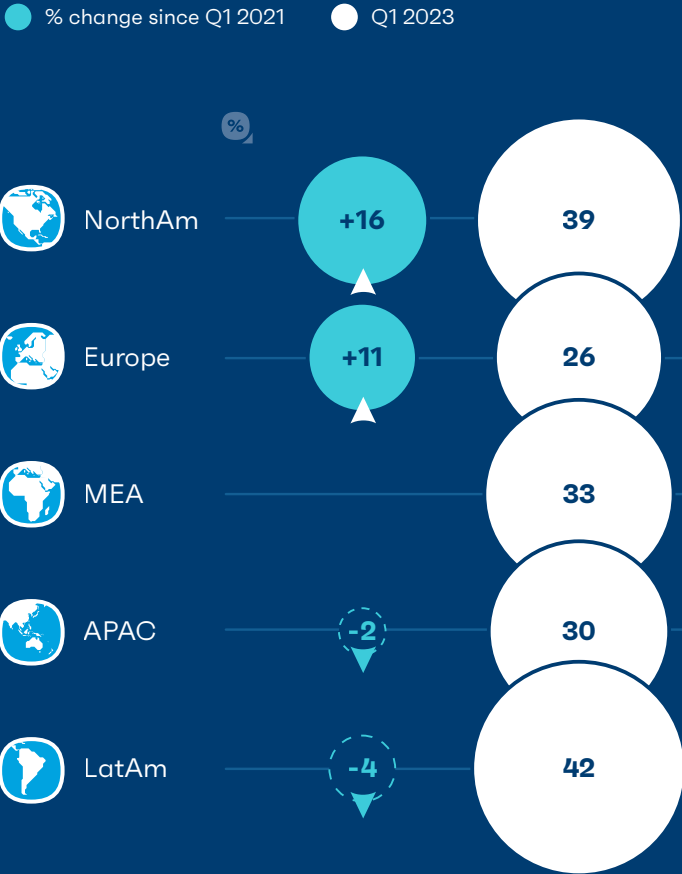
With social media users in North America being more likely to make in-app purchases, brands should prioritize creating seamless and convenient shopping experiences within social platforms. Integrated features where users can buy directly from posts are likely to further enhance the shopping experience for these users.

Given consumers in APAC are the most likely to use ad-blockers, brands should approach social shopping in a more nuanced way - alternative approaches like influencer collaborations and UGC are likely to be more successful than traditional advertising methods on social media.

Make-up brand Glossier excels in integrating shopping on social platforms. Their social storefront is a place for product discovery and integrates their social media posts to their online store. The brand also collaborates with influencers, posting videos of their **routines** on YouTube, but with a difference; they embrace mentioning competitors in influencer collaborations, showcasing authenticity and fearlessness.

Social commerce grows in some regions more than others

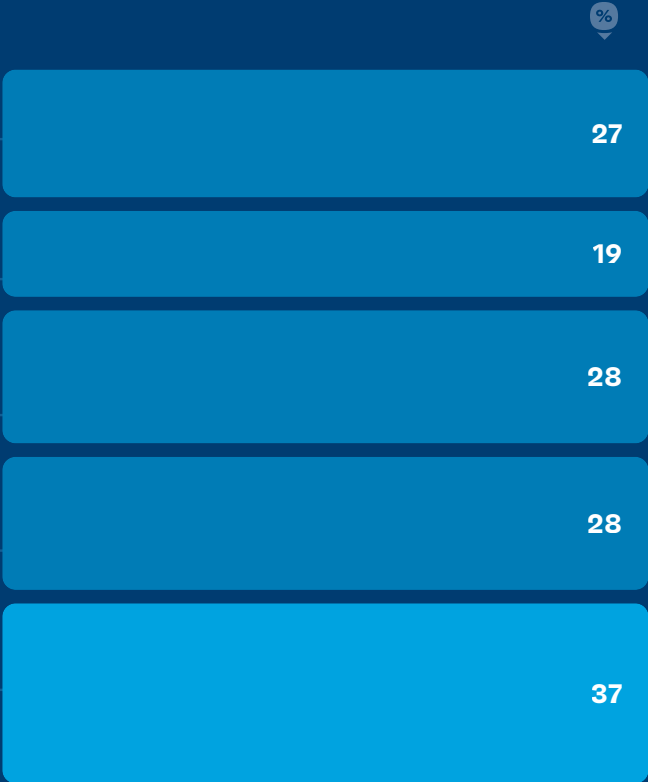
% of platform users in each region who say they've used Facebook Marketplace/Instagram Shopping Bag in the last month



GW Core Q1 2021 & Q1 2023
335,289 platform users aged 16-64

Latin America sees the most consumers clicking on social ads

% of social media users in each region who say they've clicked on a promoted/sponsored post on a network in the last month



GW Core Q1 2023
225,744 social media users aged 16-64

The future of livestream shopping

Livestream shopping took China by **storm**, particularly during the pandemic when shoppers were grounded in their homes.

Livestreams are still very popular in APAC, with the biggest proportions watching them in Indonesia, Vietnam, and China. There are new opportunities in other markets too. The number of social media users watching livestreams in the Netherlands and UAE has grown 9% and 6% respectively since Q1 2021, and their popularity is also **growing in the US**. So while lockdowns gave people the opportunity to watch these videos, they've continued to build momentum since. In fact, the global live shopping market is projected to **grow** to more than \$2 trillion by 2025.

Social platforms are also increasingly investing in this space. TikTok has started testing TikTok Shop, a feature which allows users to buy directly from the app. The feature has not yet fully launched around the world, but has taken off in **Indonesia**. YouTube's also **expanding** its shopping capabilities, with users being able to buy before leaving the platform.

For brands, there's a few key audiences to connect with. Gamers, for example, should be a target audience here as livestream watchers are 21% more likely to be gamers and 62% more likely to be interested in esports than the average consumer. Livestream

watchers are also 43% more likely than average to say they buy the premium version of products. This gives **luxury retailers** an opportunity to dip their toes in the world of livestreams and for potential customers to see an interaction with a product before a big purchase.

Livestreams offer brands an opportunity to connect on a more **personal** level with an often impulsive audience who value influencer recommendations. They also offer a platform for collaborations with content creators, allowing brands to tap into their following and bridge the **gap** between digital and physical selling.

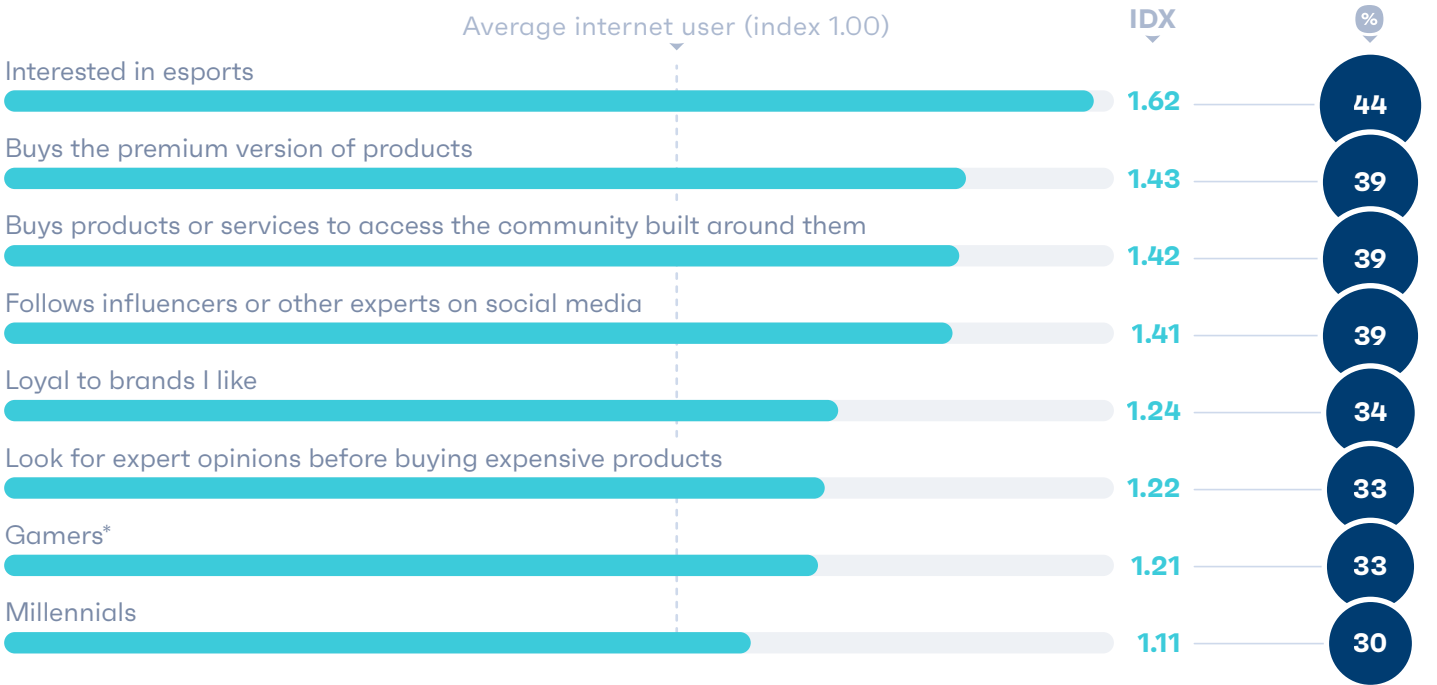
Where livestreams are most popular

% of social media users in each country who say they've watched a livestream in the last week



Who are the keenest livestream watchers?

% in each group who say they've watched a livestream in the last week (sorted by top over-index)



*Gamers are defined as those who use games consoles, handheld devices, media streaming devices, PC/laptop, tablet or VR headsets to play games

GWI Core Q1 2023 225,744 social media users and 241,138 internet users aged 16-64

Want fresh audience insights on tap?

See what GWI can do for you.



Book a free demo



Appendix

- | | | | | |
|--|---|--|--|---|
| <p>1 On an average day, how long do you spend on social media?</p> <p>2 On an average day, how long do you spend on social media?</p> <p>3 On an average day, how long do you spend on the following?</p> <p>4 From this list, what would you say are your top 3 hopes or aspirations right now? • Which of the following are important/not important to you? • Which of these statements do you agree with?</p> <p>5 What are your main reasons for using social media?</p> | <p>6 How often do you visit or use these services? (At least weekly)</p> <p>7 Which of these would you say is your favorite?</p> <p>8 How often do you visit or use these services? (At least monthly)</p> <p>9 Which of the following describes the type of content you would like to see on this app? • Which platforms/services do you use to do the following?</p> <p>10 How often do you visit or use these services? • Which of</p> | <p>these things are you interested in?</p> <p>11 Which of these best describes your approach to your social media account(s)? (I would prefer to set all my accounts to private)</p> <p>12 What have you done on Facebook/Instagram/Twitter/Reddit/Snapchat in the last month?</p> <p>13 How often do you do each of the following?</p> <p>14 Which of the following describe you? • In the last week, which of these have you</p> | <p>watched, listened to, or done online? • Which of the following actions have you done online in the past month?</p> <p>15 What are your main reasons for using BeReal?</p> <p>16 How do you typically find out about new brands and products? • Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?</p> <p>17 How much do you trust product/brand recommendations made by social media</p> | <p>influencers? • Thinking about social media influencers, to what extent do you agree or disagree with the following?</p> <p>18 What have you done on Facebook/Facebook Messenger in the last month? • What have you done on Instagram in the last month? • What have you done on Facebook/Facebook Messenger/Instagram/LinkedIn/Reddit/Snapchat/TikTok/Twitter in the last month?</p> <p>19 In the last week, which of these have you watched, listened to, or done online?</p> |
|--|---|--|--|---|

Notes on methodology

Introduction

All figures in this report are drawn from GWI’s online research among internet users aged 16-64 or 16+. Please note that our figures are representative of the online populations of each market, not its total population.

Our research

Each year, GWI interviews over 950,000+ internet users aged 16-64 across 52 markets, representing 2.7 billion internet users worldwide. 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 GWI 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.

Sample size by market

This report draws insights from GWI’s Q1 2023 wave of research across 52 countries, with a global sample of 241,138 respondents.

	Argentina	1,781		Malaysia	4,339
	Australia	7,986		Mexico	5,085
	Austria	2,019		Morocco	847
	Belgium	2,037		Netherlands	2,530
	Brazil	8,872		New Zealand	1,900
	Bulgaria	1,250		Nigeria	917
	Canada	6,360		Norway	1,258
	Chile	1,264		Philippines	3,820
	China	24,492		Poland	3,107
	Colombia	3,811		Portugal	2,277
	Czech Republic	1,297		Romania	1,264
	Denmark	1,529		Russia	4,189
	Egypt	1,764		Saudi Arabia	1,797
	France	10,509		Singapore	3,424
	Germany	10,507		South Africa	1,818
	Ghana	851		South Korea	2,280
	Greece	1,273		Spain	10,358
	Hong Kong	1,957		Sweden	2,531
	Hungary	1,250		Switzerland	1,515
	India	14,768		Taiwan	2,680
	Indonesia	6,394		Thailand	4,463
	Ireland	1,386		Turkey	2,030
	Israel	1,527		UAE	1,818
	Italy	10,145		UK	10,140
	Japan	10,217		USA	25,340
	Kenya	984		Vietnam	3,181

Mobile survey respondents

From Q1 2017 on, GWI 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 GWI’s Core survey via PC/laptop/tablet. For more details on our methodology for

mobile surveys and the questions asked to mobile respondents, [click here](#).

Internet penetration rates across GWI’s markets

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of around 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 in North America, much of Europe and places in APAC such as Japan and Australia.

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. In some Middle Eastern, African and Asian countries (e.g. India, Indonesia), we would also expect a gender-based skew towards males. Generally, younger internet users are more active and engaged with a lot of the behaviors and services tracked by GWI, which means % scores will typically be higher in low-to-medium-penetration markets.

Internet penetration rates: GWI versus ITU figures

As GWI’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 (GWI’s forecasts for 2022 based on ITU 2017 and 2018 data)

The table on the right refers to the total population in each market. The internet penetration estimates are calculated using the most recent data from the International Telecommunication Union - a United Nations agency

responsible for issues concerning communication technologies. The most recent published data from this source is from 2018 (and in some countries 2017), so GWI forecast the data forward to 2020 by making calculations based on the trend of internet growth in each country from 2000 onwards. This calculation is then adjusted based on other (usually national government) sources which can be used to provide an accurate overview of internet usage in each country. Note that the figures used to calculate GWI’s own universe figures will be among 16-64s only, and will therefore be higher.

%		
	Argentina	92
	Australia	99
	Austria	95
	Belgium	97
	Brazil	90
	Canada	99
	Chile	76
	China	90
	Colombia	82
	Czech Republic	96
	Denmark	99
	Egypt	68
	France	96
	Germany	98
	Ghana	60
	Greece	91
	Hong Kong	99
	India	44
	Indonesia	63
	Ireland	97
	Israel	96
	Italy	90
	Japan	96
	Kenya	67
	Malaysia	94
	Mexico	82
	Morocco	74
	Netherlands	98
	New Zealand	97
	Nigeria	68
	Norway	99
	Philippines	75
	Poland	92
	Portugal	89
	Romania	92
	Russia	95
	Saudi Arabia	91
	Singapore	99
	South Africa	78
	South Korea	100
	Spain	97
	Sweden	98
	Switzerland	98
	Taiwan	97
	Thailand	71
	Turkey	88
	UAE	97
	UK	99
	USA	98
	Vietnam	72

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