globalwebindex

Social

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

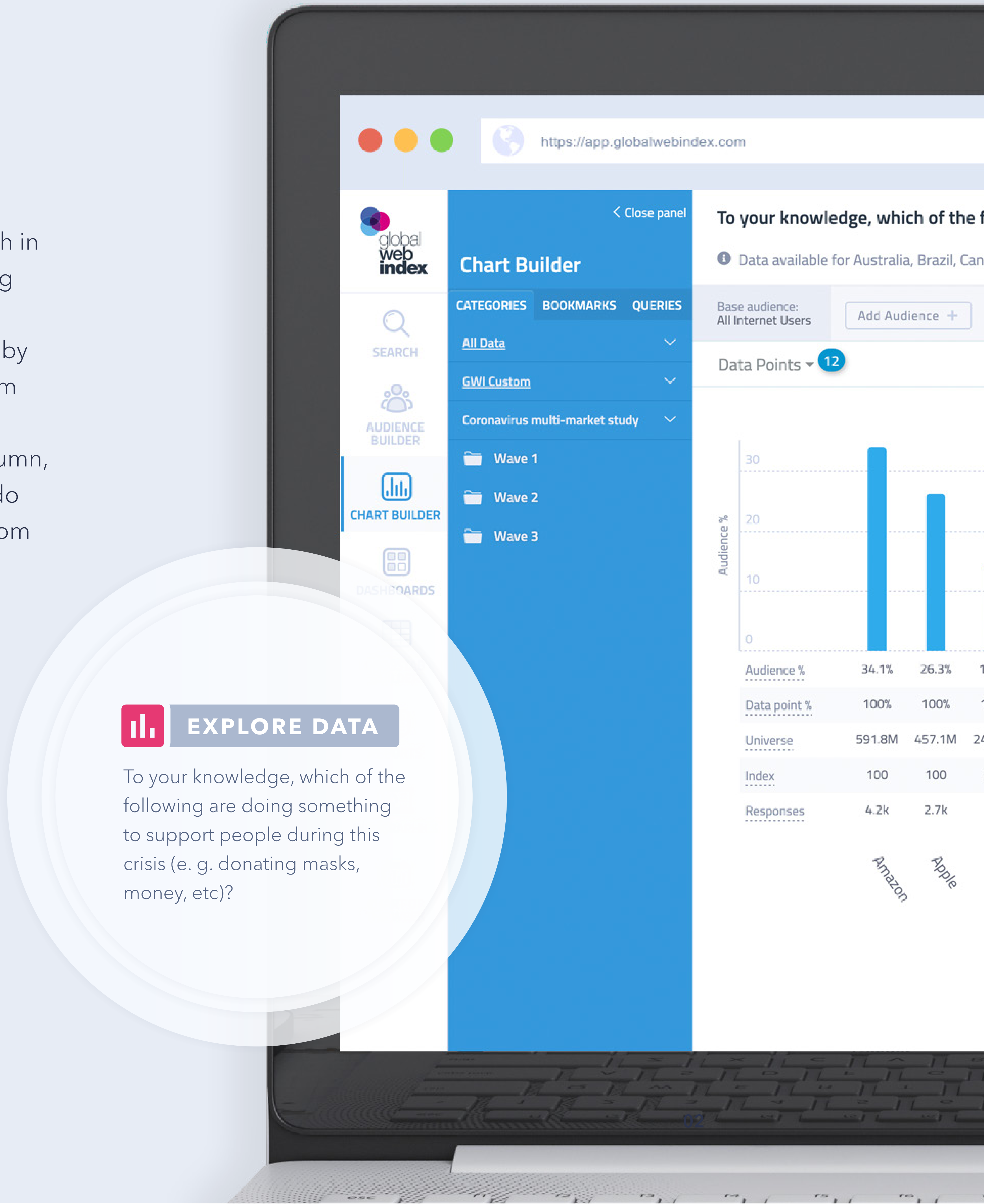
FLAGSHIP REPORT 2020

globalwebindex.com

What's inside?

RECREATE CHARTS FOR YOURSELF

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time and among custom audiences. You can find the corresponding question to each chart in the right hand column, starting from left to right. Any charts which do not contain a hyperlink are from a GWI custom study. Custom study data is not available to explore on our Platform.



Introduction

GlobalWebIndex's Social Media flagship report provides the most important insights on the world of social media, from keynotes on how attitudes are changing to the very latest figures for social media engagement. This is done with a particular focus on how COVID-19 is impacting key trends.

This report focuses on:

- **Post-COVID perspectives on social media –** how has the pandemic built upon or reversed key attitudes toward social media?
- **The social media landscape –** which social platforms are most popular, and have made the most headway in recent months?
- **Social media behaviors –** how have social media behaviors changed over the last year and since the outbreak?
- **The social purchase journey –** how is the momentum for social commerce looking, both before we started seeing the pandemic's impact on media habits, and since?

Methodology

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and 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 online populations are more young, urban, affluent and educated than the total population.

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

When reading this report, please note that we use a mixture of different research:

QUARTERLY GLOBAL RESEARCH

We use our quarterly global data across 46 markets to lay out the trends apparent in the social space before the pandemic's effects on media habits could be fully observed (January-March 2020).

CUSTOM CORONAVIRUS RESEARCH

Figures referring to our COVID-19 research are drawn from Wave 4 of a custom recontact study fielded in 20 countries between May 19-26 2020. Countries included Australia, Brazil, Belgium, Canada, China, France, Germany, India, Ireland, Italy, Japan, New Zealand, the Philippines, Poland, Romania, South Africa, Singapore, Spain, the UK and the U.S. We also reference our first three waves of research, fielded between March 16-20 in 13 countries (Wave 1), March 31-April 2 in 17 countries (Wave 2), and April 22-27 in 17 countries (Wave 3). Our custom data considers where the pandemic has advanced or undercut key trends.

CUSTOM RECONTACT RESEARCH

This research was conducted throughout April-June 2020 in the UK and U.S. only and develops on key findings from our global and coronavirus research.

INDEXES

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Key Insights

01

Social media has become the bedrock of our digital news habits.

Staying up-to-date with news and current events is the most commonly cited reason for using social platforms, and the COVID-19 pandemic has accelerated the global trend of relying on these sites for information updates.

02

Digital consumers are using social media for entertainment purposes on a greater scale than before the outbreak.

But recent events have given the more “social” elements of social media a new lease of life.

03

Younger consumers are understandably using social media, messaging services and apps more due to the outbreak.

But there are signs of Gen Z reverting back to old usage habits, as baby boomers continue to diversify their behaviors over the course of the pandemic.

04

Many younger consumers have taken to livestreaming in the last few months.

The question is whether livestreaming is a likely post-pandemic game changer for certain industries. With 23% of consumers planning to continue watching more videos post-outbreak, the future of livestreaming looks promising.

05

Social media ads have brought consumers closer to brands during the pandemic, but closing sales remains a challenge.

With only 13% saying a "buy" button would most increase their likelihood of purchasing, it’s clear that an uncommitted approach to social commerce won’t be enough to put the spending wheels in motion.

01

Social

Post-COVID perspectives on social media

News and narratives

Social media has become the bedrock of our digital news habits. Staying up-to-date with the news is the leading motivation for using social media across all age groups except Gen Z; and all regions except Europe and North America.

Though their reasons for using social media are more varied, Gen Z place a similar level of importance on reading the news as their older counterparts, with just two percentage points separating them and other age groups.

Since Western online populations tend to have a greater representation of older age groups, staying in touch with friends takes the top spot on their list. **But the pandemic has accelerated the global trend of reading news stories on social media, even among those lagging behind:** in April, as many as 6 in 10 Gen Zs reported using it to keep up-to-date with news during the outbreak.

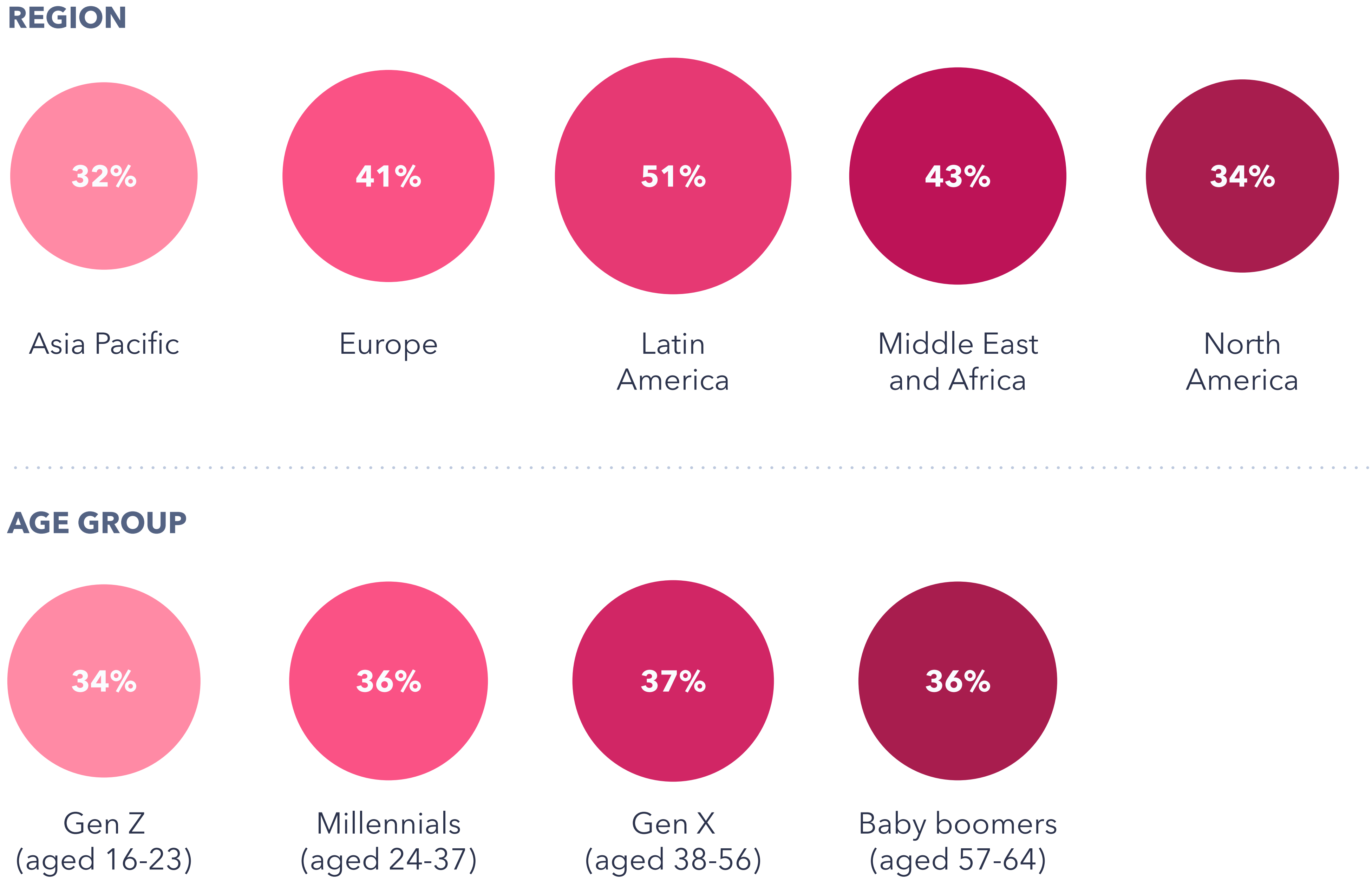
Trust does remain an issue: 47% of all internet users use social media for news updates, yet only 14% deem it the most trustworthy source. But these sites are used far more than updates from health organizations (29%), despite more people trusting them (34%).

When looking for information, many want the fuller picture and to take part in discussions around it. Even fighting the "infodemic" is presented as something to do collectively via social media, rather than a reason to avoid it. **News is therefore a well-embedded and increasingly important aspect of the online social experience.**

Staying up-to-date with news and current events is the most commonly cited reason for using social media

SOCIAL MEDIA MAKES THE WORLD'S NEWS GO ROUND

% of global internet users in each demographic who say staying up-to-date with the news is a main reason for using social media

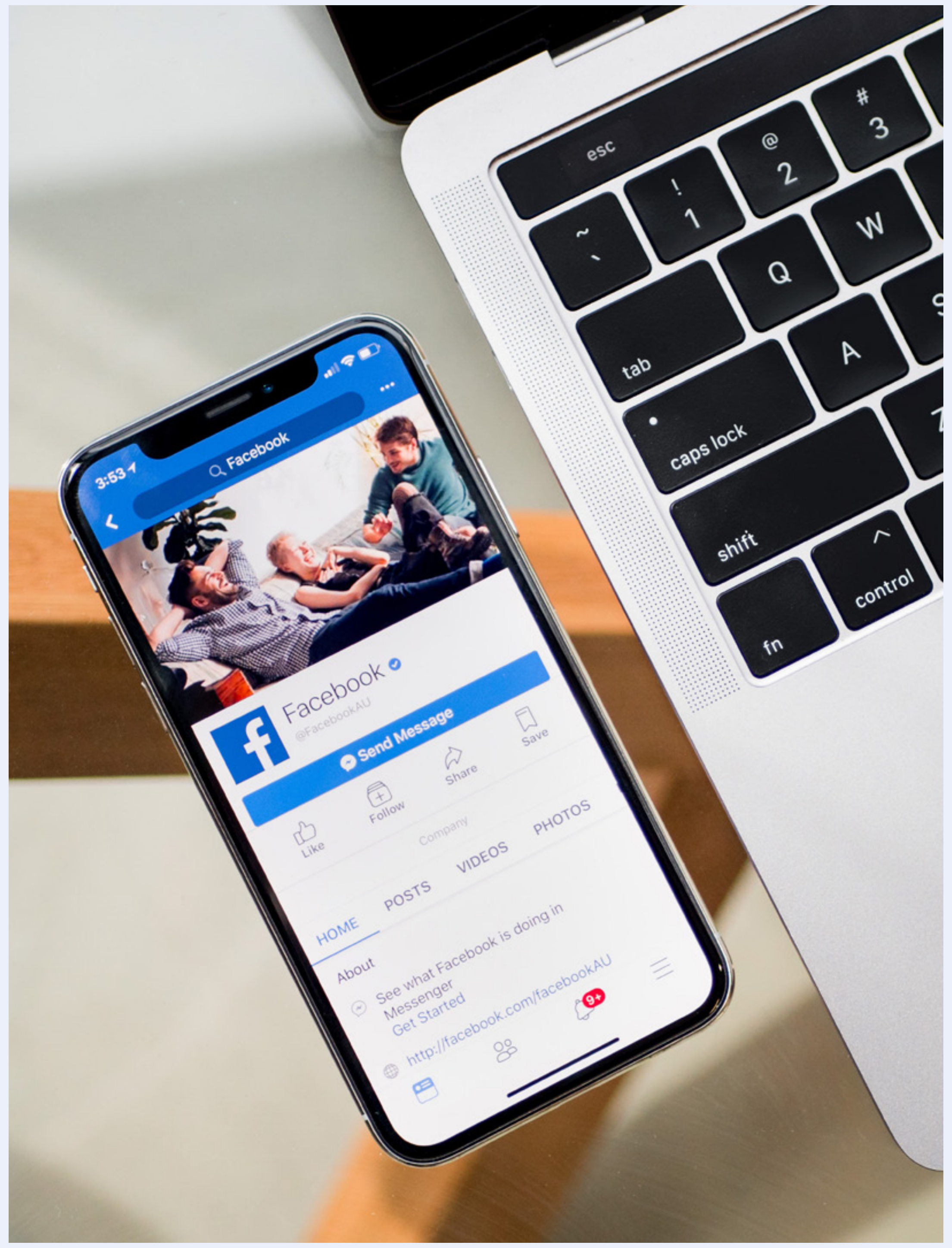


EXPLORE DATA

Question: What are your main reasons for using social media? (To stay up-to-date with news and current events)
Source: GlobalWebIndex Q1 2020
Base: 143,232 internet users aged 16-64

• **TREND IN ACTION** •

Responsibility in the hands of the provider



The great thing about the Internet is everyone can be a publisher. The really bad thing about the Internet is everyone can be a publisher.

Steven Brill, CEO of NewsGuard

Social media moves and shapes the public dialogue, and companies operating within it are responding more to their impact on society. One reason for this is the general public and government authorities demanding that they be held more accountable for the information circulated on their sites. For example, President Trump **signed** an executive order aiming to undermine the legal shield that protects social media companies from liability for user-created content.

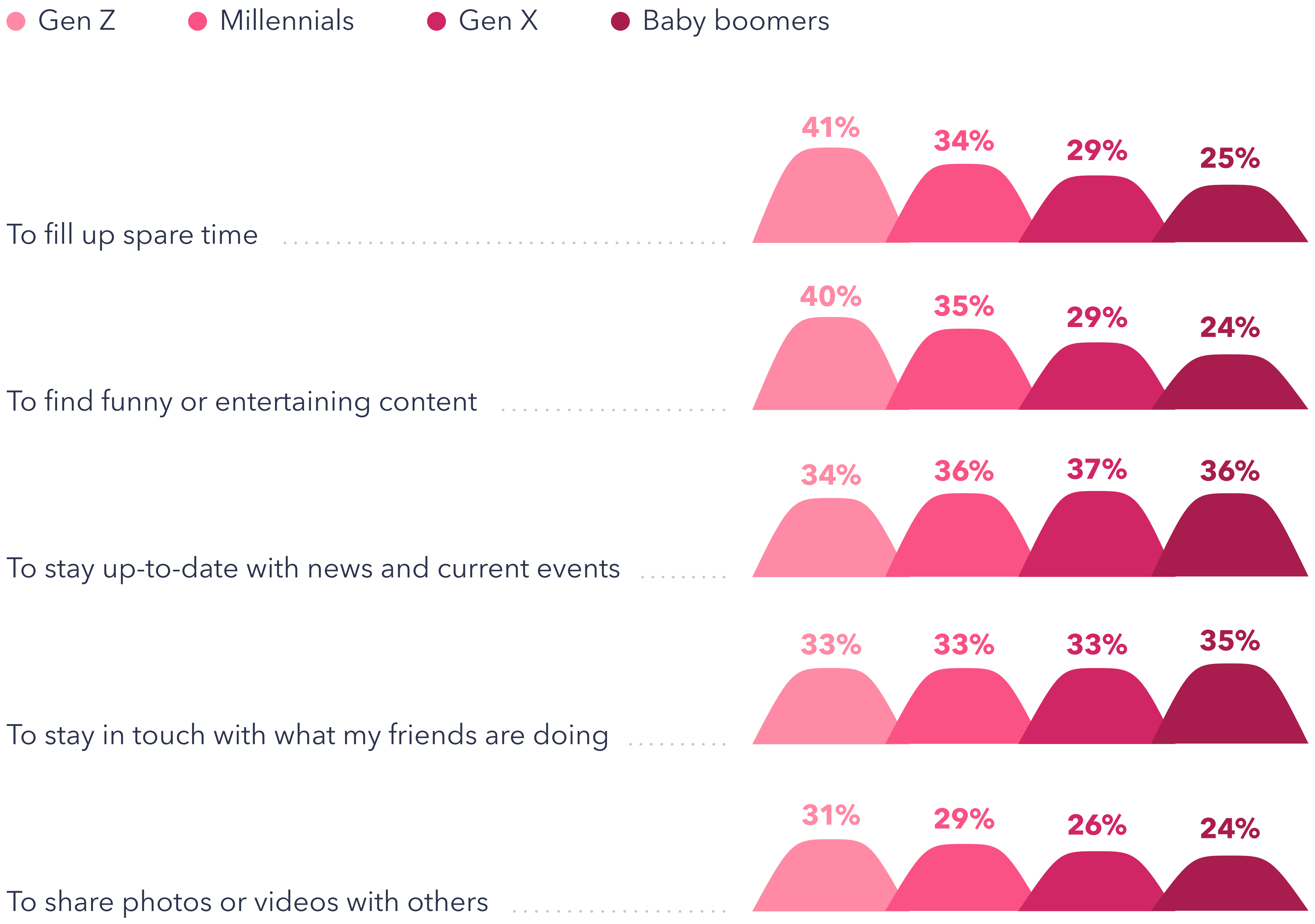
Social media's top players have responded to these calls to action: Facebook is **notifying** users about sharing outdated news stories, and is **trialing** a new offering of media literacy tips to help them recognize truthful and misleading headlines. Likewise, Twitter recently **announced** it will be asking users to open links and read articles before resharing them.

This all shows the burden of responsibility shifting in the direction of social media companies. If successful, these steps will encourage higher levels of trust in the online social space more generally.

Back to some "social" basics

SOCIAL MEDIA AND ENTERTAINMENT

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



In 2019, we noted that social platforms were starting to look like entertainment hubs, with finding entertaining content ranking as the third-most important reason for using social media and the motivation showing the most growth. Since then, the portion of the online population using social media for this purpose has remained consistent.

Staying in contact with friends has dropped nine percentage points between 2017 (42%) and 2020 (33%). Sharing photos or videos has also decreased gradually as a motivation for using these sites over the past few years. **These are signs that social media has become less about connecting and sharing than consuming content.**

But COVID-19 has shaken this up. With more time on their hands, digital consumers are using social media for entertainment purposes on an even greater scale than before the outbreak. **Equally important though, is the impact recent events have had in terms of breathing some life back into the more "social" elements of social media.**

55% of those who communicate via public or private channels in the U.S. and UK admit to sharing more over the last two months. Similarly, 3 in 10 internet users in these countries report being more open about the struggles they're facing on public social channels.

This points to a resurgence in people using social platforms to connect with loved ones and reach out to their wider social network.

EXPLORE DATA

Question: What are your main reasons for using social media?
Source: GlobalWebIndex Q1 2020
Base: 37,418 Gen Z aged 16-23, 64,945 millennials aged 24-37, 57,866 Gen X aged 38-56 and 15,316 baby boomers aged 57-64

PARTNER PERSPECTIVES:

A resurgence of meaningful connections on social media during COVID-19

By **Mobbie Nazir,** Chief Strategy Officer, We Are Social

When the COVID-19 pandemic hit, social media became the primary way of communicating and socializing for many people all over the world, almost overnight. **There was a resurgence in the way people used to use social years ago; to make meaningful connections.**

It's hardly surprising that social media has helped us feel less lonely. This sentiment reaches a high of 65% among Gen Z and 61% among millennials; for younger generations who missed seeing their friends in school or building new relationships in their first job out of education, **connecting with social media has been a lifeline to maintain friendships.**

The way we are communicating has changed too. With 42% of social media users saying they are under less pressure to portray an unrealistic image of their life during the COVID-19 pandemic and corresponding lockdowns, this marks a very positive shift in the way we perceive ourselves and others online.

Perhaps surprisingly, 46% of male social media users say they have been more open on their public social channels about the struggles they are facing, compared to 31% of women. **While the last few months have been a rollercoaster of emotions, it's encouraging to see more people – men, in particular – feeling comfortable enough to open up about the pressures of life in quarantine, and feel less pressured to present a polished, perfect version of themselves online.**

That's not to say every piece of content has to be gritty and showcasing the struggles of today's lives. There's plenty of room for escapism and humor – **our research also showed that funny content was one of the most-shared categories right now.**

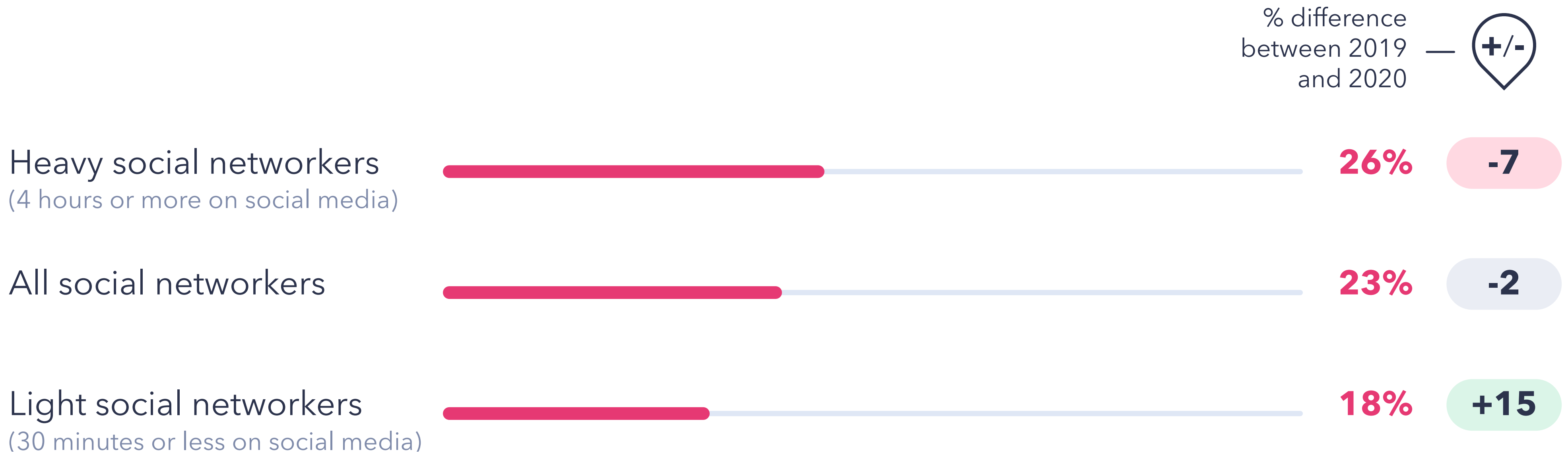
Social media has also been helping us maintain a sense of community when IRL contact is lacking. The content sources that have inspired us the most have been our friends and family (falling within 74% of respondents top three sources) and our local communities (52%). While friends and family would remain consistently high in any situation, **the pandemic has really propelled this sense of online social media communities, from local Facebook groups that help those self isolating, to street specific WhatsApp groups to share knowledge and advice.**

As the role social media plays in both supporting and impacting these aspects of our lives, continue – it is my hope that we see the shift toward more honest, open and community-led social media persist, and grow.

Concerns over digital wellbeing have taken a back seat

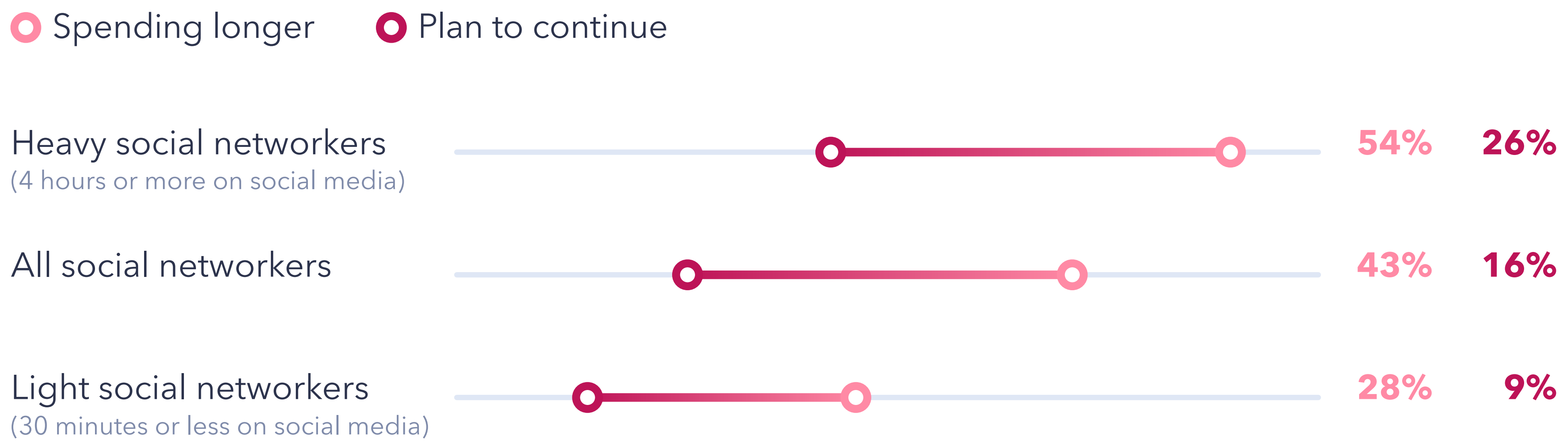
IDEAS AROUND WELLNESS ARE BECOMING LESS DIGITALLY-FOCUSED

% in each usage bracket who have tracked their screen time or set limits for certain apps in the last month



INCREASED USAGE DRIVEN BY HEAVY NETWORKERS

% in each usage bracket who are spending longer on social media/plan to carry on doing so post-outbreak



Digital wellbeing was a popular topic in 2019, with tech giants like Google investing heavily in tools that **allow** users to switch into "Focus Mode", track app usage and personalize their "do not disturb" settings. But internet users have had other things to think about, particularly in recent months, and moderating time online has become less of a priority.

Overall, the portion of global consumers tracking their screen time each month has decreased slightly over the last year, most noticeably among heavy users of social media. Light users are the ones raising the average and resisting this overall trend, which is likely due to them having already taken a stance on self-control and their ongoing efforts to keep social media usage to a minimum.

Despite relying on the internet more during the outbreak, only 14% in the U.S. and UK feel that the amount of time they spend online has become a matter of increased concern; whereas 34% cite their own mental wellbeing. **Internet users therefore aren't currently making strong connections between their mental wellbeing and internet usage, as social media has been a crutch to many in recent months and one of the few means of communication while distancing.**

Though fewer intend on making this a long-term habit, it's still almost a quarter of heavy users who plan to continue spending longer on social media post-outbreak. **The question is whether this move is temporary or represents something more like a change in attitude.**

We'll consider the groups most likely to make lasting changes to their media habits later on in the report.

Access the "**Heavy**" and "**Light**" Social Networkers audiences on our platform.

EXPLORE DATA

Question: Which of these have you done on your mobile in the last month? (Tracked your screen time or set limits for apps)
Source: GlobalWebIndex Q4 2019-Q1 2020
Base: 349,404 internet users aged 16-64

EXPLORE DATA

EXPLORE DATA

Question: Which of the following have you been doing at home, because of the outbreak? (Spending longer on social media) | Once the outbreak is over, do you think you'll carry on doing the following?
Source: GlobalWebIndex Coronavirus study, May 19-26 2020
Base: 17,149 internet users in 20 countries aged 16-64

02

Social

Social media engagement

Time spent on social media

DAILY TIME SPENT ON SOCIAL MEDIA | Average h:mm spent using social networks on a typical day

	2017	2018	2019	2020
Argentina	3:12	3:17	3:20	3:21
Australia	1:39	1:34	1:46	1:47
Austria	1:16	1:15	1:18	1:16
Belgium	1:31	1:31	1:34	1:37
Brazil	3:40	3:39	3:40	3:38
Canada	1:48	1:47	1:50	1:45
China	1:58	2:00	2:13	1:57
Colombia	-	3:34	3:46	3:30
Denmark	-	1:35	1:35	1:34
Egypt	3:06	3:05	3:02	2:38
France	1:24	1:22	1:36	1:36
Germany	1:13	1:08	1:19	1:20
Ghana	2:59	3:09	3:07	3:13
Hong Kong	2:00	1:53	1:55	1:54
India	2:25	2:28	2:28	2:36
Indonesia	3:26	3:23	3:18	3:18
Ireland	1:45	1:55	1:53	1:42
Israel	-	-	1:59	2:10
Italy	1:53	1:48	1:51	1:48
Japan	0:46	0:40	0:44	0:46
Kenya	2:50	2:59	3:16	3:34
Malaysia	3:06	3:03	2:56	2:55
Mexico	3:11	3:14	3:21	3:23

	2017	2018	2019	2020
Morocco	2:22	2:34	2:30	2:19
Netherlands	1:24	1:17	1:19	1:17
New Zealand	1:49	1:42	1:46	1:41
Nigeria	3:03	3:26	3:30	3:42
Philippines	4:00	4:08	4:00	3:50
Poland	1:42	1:45	1:54	1:51
Portugal	2:13	2:12	2:10	2:19
Romania	-	2:34	2:20	2:15
Russia	2:20	2:21	2:28	2:16
Saudi Arabia	2:38	2:52	3:08	3:11
Singapore	2:07	2:11	2:12	2:17
South Africa	2:47	2:58	3:15	3:32
South Korea	1:11	1:11	1:13	1:12
Spain	1:38	1:41	1:49	1:47
Sweden	1:54	1:49	1:49	1:41
Switzerland	1:18	1:19	1:18	1:18
Taiwan	2:06	1:52	1:53	1:42
Thailand	3:06	3:14	2:57	2:49
Turkey	2:49	2:52	2:56	3:05
UAE	2:56	3:00	3:03	3:17
UK	1:54	1:51	1:47	1:41
U.S.A.	2:02	2:05	2:01	2:08
Vietnam	2:36	2:33	2:23	2:22

Between 2019 and 2020, time spent on social media has continued to plateau, but it's increased in 18 markets – most noticeably in Kenya, South Africa, the UAE and Nigeria

Please note the data on this page shows time spent figures between January and March – before the true extent of the pandemic's impact on social media behaviors could be fully observed

EXPLORE DATA

Question: On an average day, how long do you spend on social media? **Source:** GlobalWebIndex Q1 2017-Q1 2020 (averages of all waves conducted each year) **Base:** 370,051 (2017), 474,573 (2018), 598,185 (2019) and 175,545 (2020) internet users aged 16-64

Recent jumps in usage

The biggest social media users pre-outbreak are the ones driving the usage spike during lockdown

Between January and March, digital consumers were spending an average of 2 hours and 22 minutes per day on social networks and messaging apps. In 2018, we started to see time being spent on social media plateau across a handful of countries – where time spent online either stayed the same or decreased. **This pattern continued into 2020 (as shown on the previous page), only to be interrupted by the pandemic.**

Younger groups continue to be the most enthusiastic about using social media amid the crisis, along with the internet populations of fast-growth markets – who tend to be younger than most mature markets. **It's therefore been the case that Gen Z and millennials, together with digital consumers in the MEA and Latin America, have been the driving force behind recent increases in social media consumption.**

It's worth noting that over a quarter of baby boomers have also been spending longer on social platforms, **which is giving this less experienced audience (where social media is concerned) a chance to embrace new habits** – rather than simply build upon old ones. For these reasons, changes among older consumers are likely to be more impactful in the long run.

DAILY TIME SPENT ON SOCIAL MEDIA (JANUARY-MARCH)
Average hh:mm spent using social networks on a typical day

SPENDING LONGER ON SOCIAL MEDIA (MAY)
% in each demographic who have been spending longer on social media because of the outbreak

		Daily time spent	Spending longer
AGE GROUP	Gen Z	02:41	54 %
	Millennials	02:22	44 %
	Gen X	01:49	35 %
	Baby boomers	01:11	27 %
REGION	Asia Pacific	02:08	44 %
	Europe	01:40	35 %
	Latin America*	03:38	56 %
	Middle East and Africa*	03:32	57 %
	North America	02:06	32 %

*Please note that in our COVID-19 research, we only track Brazil in Latin America, and South Africa in the MEA

EXPLORE DATA

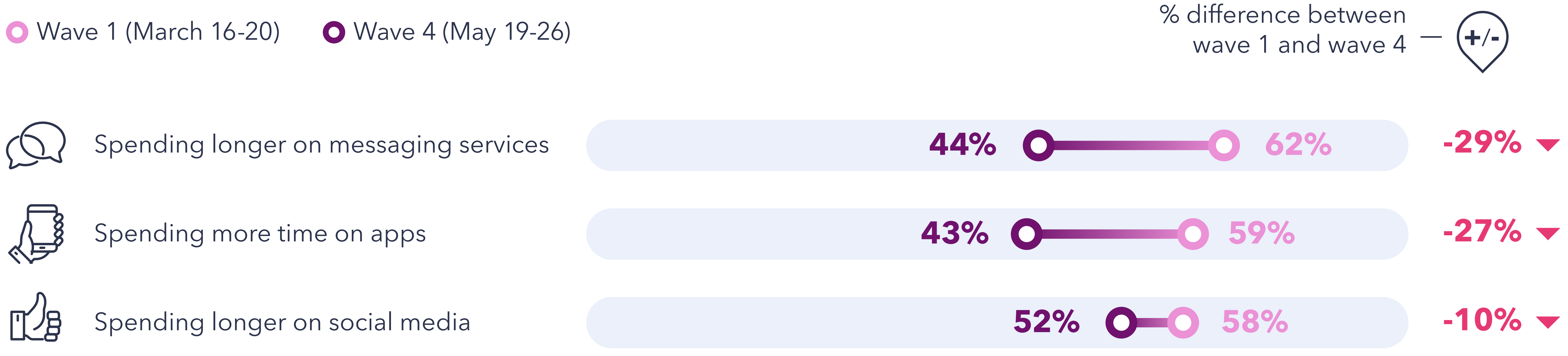
EXPLORE DATA

Question: On an average day, how long do you spend on social media? | Which of the following have you been doing at home, because of the coronavirus / COVID-19 outbreak? (Spending longer on social media) **Source:** GlobalWebIndex Q1 2020; Coronavirus study, May 19-26 2020 **Base:** 125,777 internet users aged 16-64 across 20 countries; and 17,149 internet users across 20 countries aged 16-64

Age-specific fluctuations

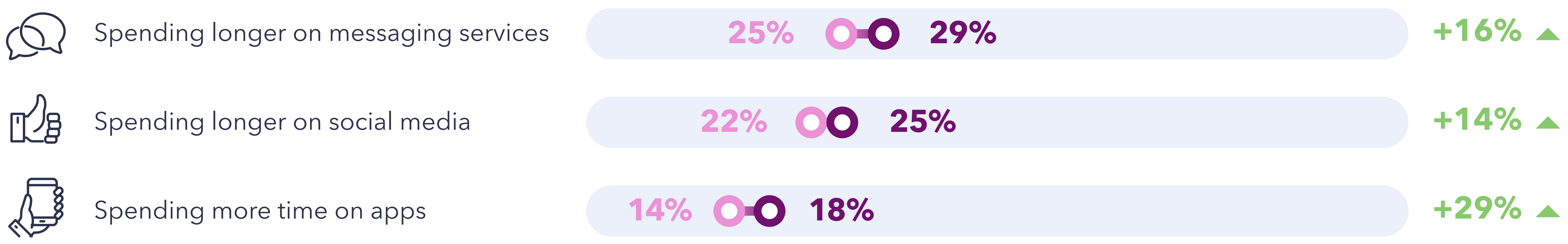
GEN Z: NEW BEHAVIORS ARE SHORT-LIVED

% of Gen Z in 13 countries who have been doing the following because of the outbreak



BABY BOOMERS: MEDIA HABITS HAVE DIVERSIFIED

% of baby boomers in 13 countries who have been doing the following because of the outbreak



Though younger consumers are far more likely to say they've been spending longer on social media since the outbreak, this was to be expected, given their higher levels of engagement beforehand. **But in looking at the paths taken by different age groups across all four waves, we begin to see more compelling stories in the data.**

Younger consumers are understandably using social media, messaging services and apps more due to the outbreak. Yet, Gen Z haven't been doing so with the same levels of enthusiasm they demonstrated back in mid-March. **Despite this initial burst in engagement, the novelty of having excess time to devote to these activities has slowly worn off, and they've begun a process of reverting back to their old usage habits.**

In contrast, older consumers have continued adopting new behaviors. Previously less inclined to use social media, baby boomers have diversified their behaviors over the course of the pandemic. **This is a sign that those once reluctant to rely on social media are abandoning any preconceived notions and finally allowing themselves to be absorbed by the social sphere.**

EXPLORE DATA

EXPLORE DATA

Question: Which of the following have you been doing at home, because of the coronavirus / COVID-19 outbreak?
Source: GlobalWebIndex Coronavirus Studies, March 16-20 and May 19-26, 2020
Base: 806 (wave 1) and 793 (wave 4) Gen Z aged 16-23; 2,234 (wave 1) and 1,991 (wave 4) baby boomers aged 57-64 across 13 countries

Multi-networking

As a phenomenon, multi-networking has plateaued overall. Meanwhile, the average number of accounts held by baby boomers continues to rise, slowly but surely. Consumers are clearly comfortable maintaining a diverse membership portfolio, but it could be the case that any additional free time set aside for social media in recent months has been invested in their favorite apps – rather than left space for new ones.

It's difficult for fresh players to steal time away from their more established competitors, but examples of newer apps like TikTok making a dramatic entrance upon the social stage show that this space is not set in stone. **Time has not yet demonstrated a limit to the number of memberships consumers are willing to maintain, with internet users in India and Indonesia demonstrating a particularly broad portfolio (averaging 11.5 and 10.5 accounts, respectively).**

Time is precious to many consumers. The ability to understand their needs and wants as they continue to change will set the competition apart. What's more, the definition of social media is becoming ever more fluid. Multiplayer video games, video conferencing software (as we cover later in the report), and even Google Docs have been cited as such for their ability to bring users together in real time. **Services with unique features and agile enough to adapt are less likely to get lost in the clutter.**

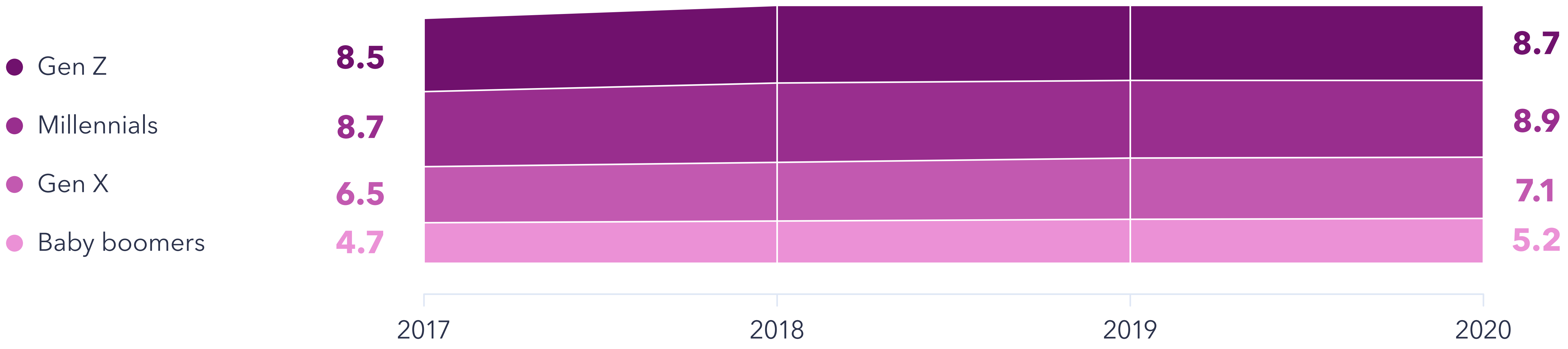
> **The world is only going to continue to get more connected, [meaning…] there are a lot of users to be had yet in the global social media market**
>
> **John Darwin,** Editor of Social Media Contractors

*The average number of accounts is calculated based on analysis of 53 named networks + "Other". Of the 53 individual platforms, 24 are global and 29 are specific to certain countries or regions.

MULTI-NETWORKING BY AGE

Average number of social media accounts held by internet users in each generation

This chart uses a select and constant group of social networks to allow for accurate comparison over time



MULTI-NETWORKING BY REGION

Average number of social media accounts* held by internet users in each region

Asia Pacific	9.3
Europe	7.5
Latin America	9.7
Middle East and Africa	8.4
North America	7.3

EXPLORE DATA

Question: On which of the following services do you have an account?
Source: GlobalWebIndex Q1 2017-Q1 2020 (averages of all waves conducted each year)
Base: 370,051 (2017), 474,573 (2018), 598,185 (2019) and 175,545 (2020) internet users aged 16-64

03

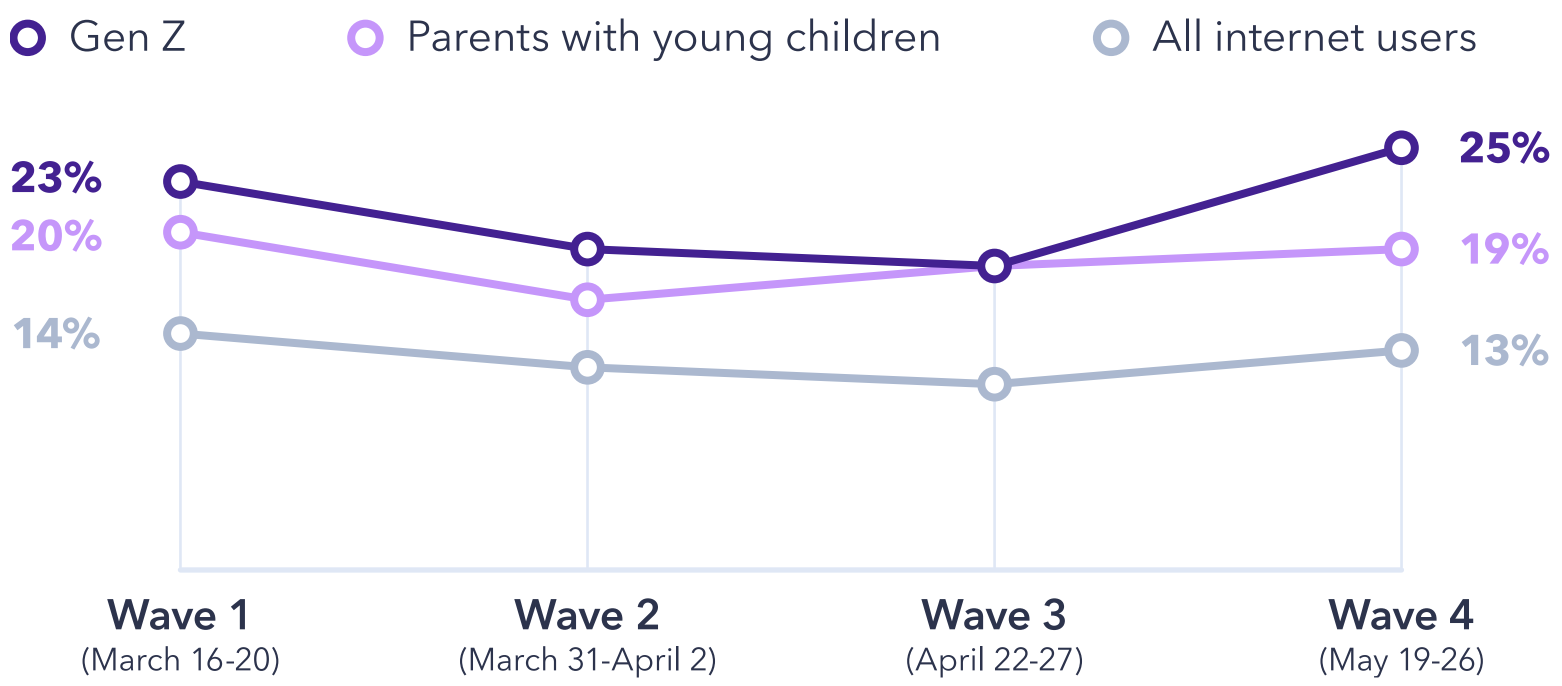
Social

The social media landscape

TikTok for the win

THE NEW "FAMILY VIDEO"

% in each audience segment across 13 countries who have been creating/ uploading videos because of the outbreak



TikTok has become a household name over the last year, and its growing popularity continues to gather momentum. **Our coronavirus research shows this service and other related platforms beginning to speak to a wider demographic.**

We expect Gen Z to be the most involved when it comes to posting videos, and this has been the case. But video-sharing platforms have also proved popular among other audiences, like parents with young children. **Platforms like TikTok can offer a space for family-oriented content, and our research points to a burgeoning culture of fun, household videos as families have sought to reconnect.**

Back in March, we wondered whether this initial spike was situational. **But despite dropping amid the outbreak, levels have recovered to what they once were.**

This testifies to short-term video's continued growth and ability to draw in more diverse audience segments.

Yet, as usage increases, TikTok is increasingly **falling** under the microscope in terms of privacy. Though this arguably **has** "nothing to do with TikTok, and everything to do with China", it will have to tread carefully if it's to avoid being targeted and risking further growth in the future.

EXPLORE DATA

Question: Which of the following have you been doing at home, because of the coronavirus / COVID-19 outbreak? (Creating/ uploading videos e.g. on YouTube, TikTok, etc.)
Source: Coronavirus Studies, March 16-20, March 31-April 2, April 22-27 and May 19-26
Base: 12,845 internet users (wave 1), 12,246 internet users (wave 2), 12,426 internet users (wave 3) and 12,578 internet users (wave 4) aged 16-64 across 13 countries

Engagement on video-sharing sites

TWITCH/TIKTOK USERS EXPECT MORE IN TERMS OF COMMUNICATION AND INTERACTION

% of each platform's daily users who approve of brands doing the following in response to coronavirus (the top platform)

93%	93%	92%	88%	87%
Providing **practical information** which help people deal with the situation	Running **offers/loyalty perks** for customers	Offering **flexible payment** terms	Running advertising to show how they're **responding to coronavirus**	Providing **light-hearted videos or content** to entertain people
TikTok users	**TikTok users**	**Twitch users**	**TikTok users**	**Twitch users**

Platforms that rose in popularity during lockdown, like TikTok and Twitch, can prove an effective gateway for brands to reach consumers at a disruptive time - something to bear in mind in the event of any future disruption. Users of both show high approval rates for coronavirus response marketing. Facebook's platforms may have enjoyed renewed trust at a time of crisis, but audiences on TikTok and Twitch are particularly receptive to hearing about how companies have navigated a turbulent period.

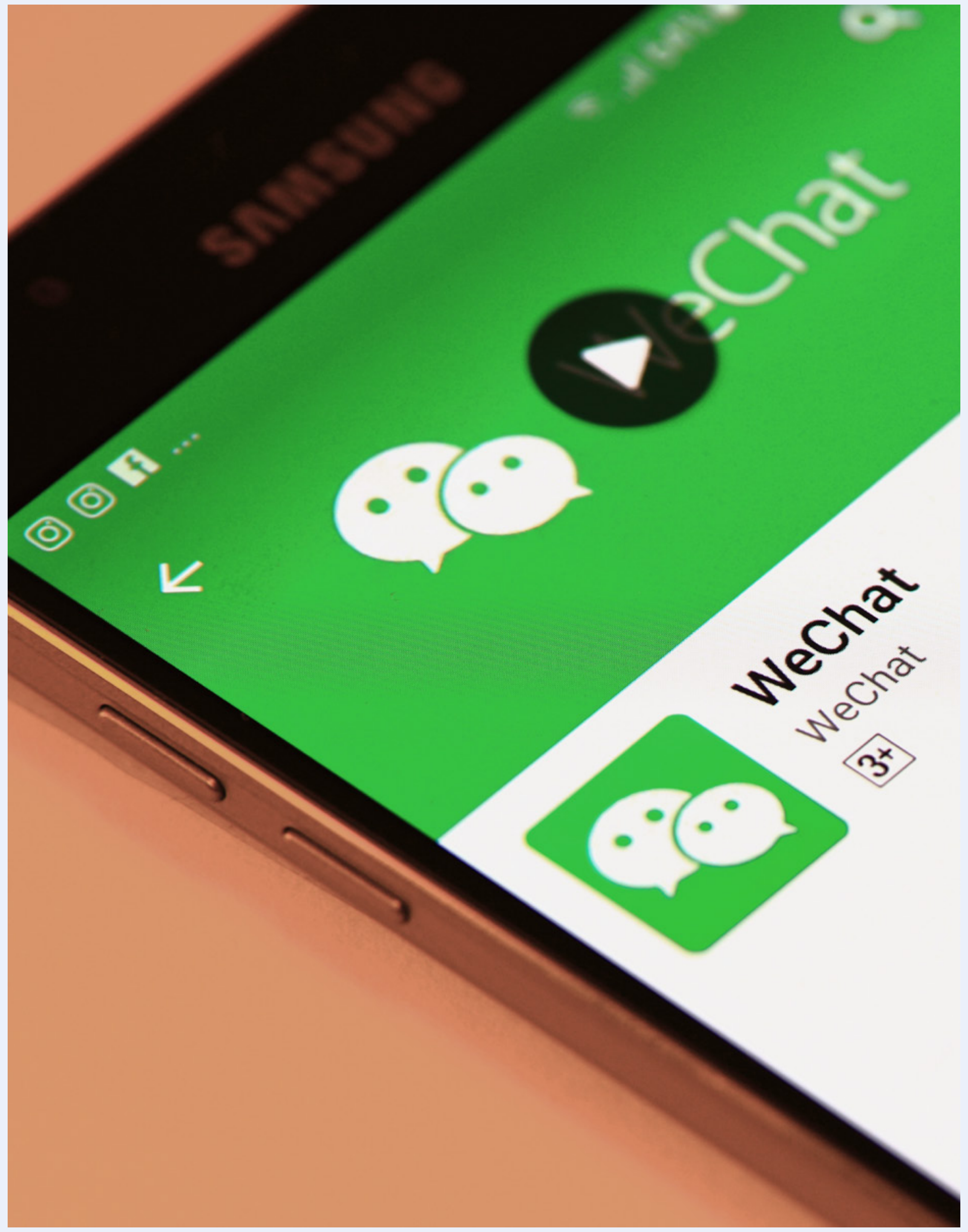
Two-thirds of daily Twitch and TikTok users fall within our Brand Interactors Segmentation

EXPLORE DATA

Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? (Strongly Approve/Somewhat Approve)
Source: GlobalWebIndex Coronavirus study, May 19-26 2020
Base: 790 daily TikTok users and 531 daily Twitch users across 20 countries aged 16-64

• TREND IN ACTION •

Super-apps in the West



Ever since WhatsApp launched its payments feature, people have speculated on the service's potential to become a super-app like WeChat. **But India hasn't yet embraced the one-app concept,** and its internet users continue to boast high figures for the average number of social media accounts.

Services outside APAC are also trying to achieve super-app status: Apple's next iPhone operating system will introduce App Clips – a new feature similar to WeChat's mini programs. Snap is similarly embracing the idea of mini-apps within Snapchat, by modeling its latest features on the Chinese example. And also refusing to sit on the sidelines, Instagram users can now order food via the app.

This all sounds positive. But upon being asked their sentiment toward linking their social media account to other services or apps, 1 in 4 U.S. and UK consumers claimed to feel uneasy; and 34% said it depends on whether they trust the service. This provides insight into the current potential for a super-app in these countries, able to mimic the likes of WeChat. **This underlying resistance means that services with super-app aspirations will need to do a lot in terms of changing mindsets first and rethink their data exchange business models – which are currently quite self-contained.**

04

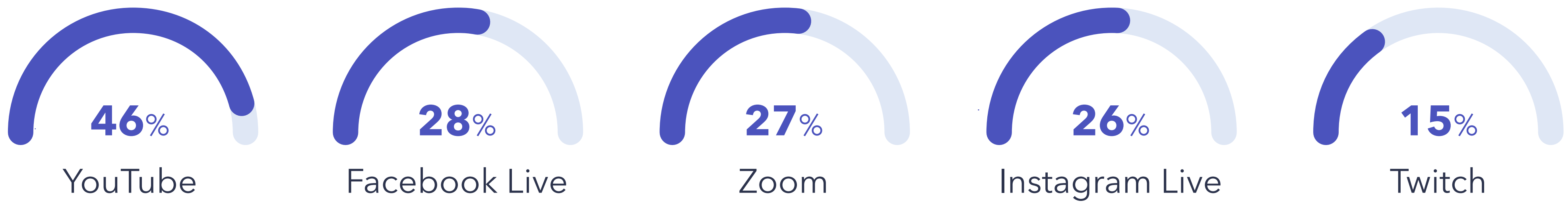
Social

Social media behaviors

Video and live content

YOUNGER CONSUMERS ARE WATCHING VIRTUAL EVENTS VIA THE FOLLOWING

% of U.S./UK Gen Z and millennials who have watched a livestream/virtual event on the following in the past 2 months



Even before the pandemic's impact on media habits had taken general effect, there was a clear appetite for video and live content. Alongside watching standard video clips, newer formats (like IGTV and Facebook Watch) aimed to hold onto today's growing audience of video enthusiasts.

We've already **considered** the outbreak's effect on livestreaming, and data we collected in May dives deeper into the emerging market for virtual events, which younger consumers in particular have adopted as a happy alternative during this period. The question is now whether livestreaming is a likely post-pandemic game-changer for certain industries, and **with 23% of global consumers planning to continue watching more videos post-outbreak, the future of livestreaming looks promising.** Social media may also see significant competition from the likes of video communication platforms like Zoom, judging by the figures in our chart.

Brands have sensed the opportunities stemming from this uptick in demand, and taken the time to improve their tech offerings: Facebook has **rushed** to make the planned updates for its live producer streaming platform available to creators. Instagram has likewise been quick to **expand** shopping features on Instagram Live and **incorporate** ads into IGTV videos. **Expanding the list of tools available to allow for better interaction is necessary if the popularity of livestreaming is to stick post-pandemic.**

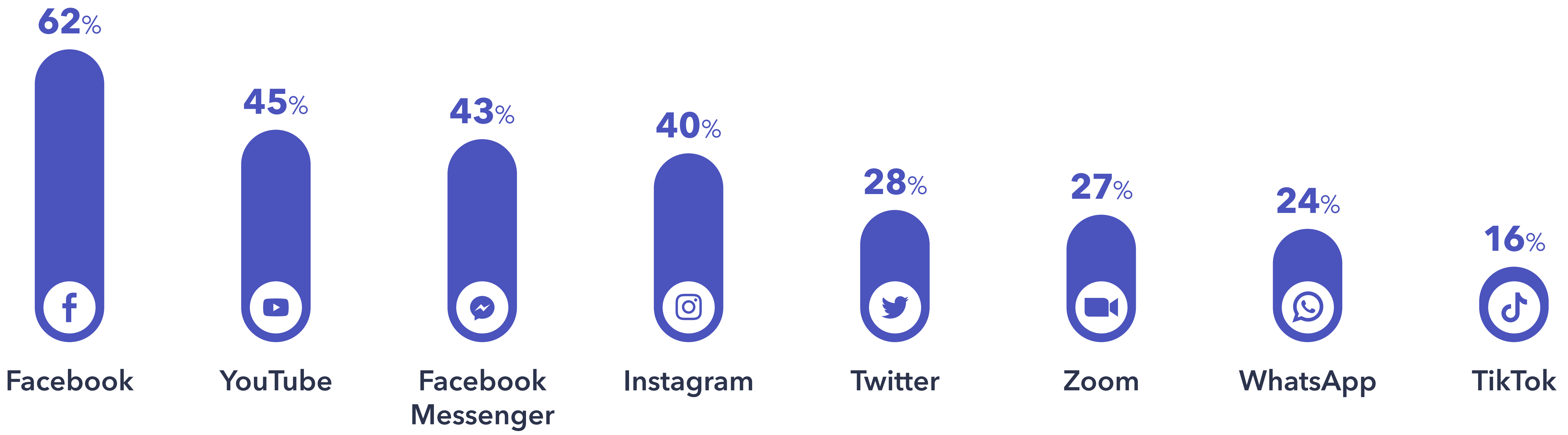
> **There isn't a one-size-fits-all approach to monetization, so we're focused on building a suite of tools that can support the different needs and ambitions of creators**
>
> **Justin Osofsky,** COO of Instagram

Question: On which of the following platforms, if any, have you watched a livestream or virtual event in the past 2 months? **Source:** GlobalWebIndex Recontact study, May 2020 **Base:** 530 (U.S.) and 259 (UK) Gen Z and millennials aged 16-37

Comfort vs. entertainment

FOR SOCIAL INTERACTIONS AND GENUINE CONNECTIONS...

% of U.S./UK private and public channel users who have used the following to feel more connected to others



FOR LIGHT AND ENTERTAINING CONTENT...

% of TikTok/Instagram/Facebook members and visitors who have been sharing more of the following

	TikTok	Instagram	Facebook
Funny videos	48%	42%	36%
Personal news/updates	47%	43%	40%
Memes	39%	34%	29%
News stories related to coronavirus	28%	26%	25%
Influencer social media posts	24%	16%	13%
A brand's social media posts	21%	14%	11%
News stories not related to coronavirus	21%	21%	19%
Brand/product recommendations	21%	15%	12%

In our upcoming Q2 2020 wave of data, we're beginning to see some of the patterns from our COVID-19 research crystallize into long-term behaviors. Consumers are engaging significantly more with live content, frequently clicking "like" and "reaction" buttons and sending more 1-to-1 messages.

But for now, **it's important to understand where these changes are occuring, as shifts in behaviors tend to be concentrated among certain platforms.** When asked to name the platforms they've been using to feel more connected to others over the last two months, U.S. and UK consumers rallied around Facebook, YouTube and Facebook Messenger. Throughout the string of global events urging social communication and collective action (like counteracting new environmental threats and protesting Black Lives Matter), **these are the platforms people have most turned to in the name of solidarity.**

Fresh demand for entertainment has absorbed other platforms. While news stories are shared in similar amounts by users regardless of the platform, when it comes to funny videos, memes and influencer content, the differences are striking and instructive in which tones of voice work on different platforms. Facebook attracts more serious content, like news and personal updates. TikTok has more funny videos and memes, but a lot of personal updates as well; and Instagram seems to be somewhere in the middle.

Question: Which of these social media / video conferencing platforms, if any, have helped you feel more connected to others in the last 2 months? | Which of the following are you sharing more of on social media or private messaging platforms? **Source:** GlobalWebIndex Recontact study, May 2020 **Base:** 1,558 (U.S.) and 861 (UK) public/private channel users aged 16-64; of this sample, there were 291 TikTok members/visitors, 1,208 Instagram members/visitors and 2,112 Facebook members/visitors

Social media and gaming

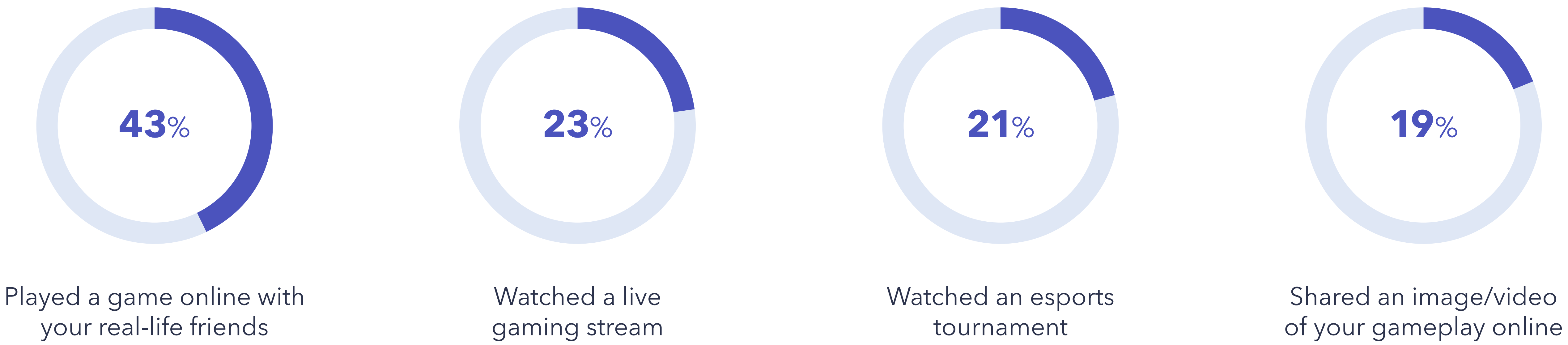
The gaming industry has always benefited from its relationship with social media. According to Facebook, more than 700 million people interact with gaming-related content on its platform each month. **Beyond this relationship between the two industries, it's been suggested that online games have already become their own category of popular social platforms.**

With 43% of gamers playing a game online with their real-life friends each month, rising to 55% in China and the Philippines, gaming is clearly a medium through which genuine social connections are forged. Connected gaming (a category of games designed to encourage virtual interactions) is gathering momentum in the post-pandemic landscape. **People have turned to gaming for social interaction during lockdowns, and now place a premium on connected experiences – which will boost the more interactive elements of gaming like chat and live video in the future.**

53% of gamers have been spending more time playing video games because of coronavirus, and a fifth plan to continue doing so

GAMING IS OFTEN A SOCIAL ACTIVITY

% of global gamers who have done the following in the last month



WITHIN THE GAMING COMMUNITY...

- Gamers are **33%** more likely to cite **meeting new people** as a main reason for using social media
- **Twitch users are 34%** more likely to want brands to run customer communities or forums
- **Cloud gamers** are **36%** more likely to advocate a brand that lets them **take part or be involved**

EXPLORE DATA

Question: Thinking about gaming, which of these things have you done? (In the Last Month)
Source: GlobalWebIndex Q1 2020
Base: 28,489 gamers aged 16-64

05

Social

The social purchase journey

Social media in the early stages

BRAND DISCOVERY DURING THE OUTBREAK

% in the U.S./UK who say they've discovered new brands via the following channels since the outbreak

Ads seen on social media	27%
Ads seen on TV	27%
Ads seen on websites	24%
TV shows/films	22%
Recommendations on social media	21%
Word-of-mouth recommendations	21%
Online retail websites	21%
Search engines	19%

BRAND RESEARCH IN THE AGE OF SOCIAL MEDIA

% of global internet users who mainly use the following when actively looking for more information about brands

	Gen Z	All internet users
Search engines	47%	51%
Social networks	47%	42%
Consumer reviews	32%	36%
Mobile apps	32%	28%

Since we first started collecting brand discovery data, search engines have consistently been the go-to. Research has noted the growing influence of social media in the early stages of the purchase journey, but it's not yet managed to overtake more traditional channels like TV ads or peer recommendations. **This gap has closed among younger generations and across various fast-growth markets, but overall it remains a sizable one.**

But as with many things, COVID-19 has accelerated this trend. **Partly explained by the fact that consumers are spending more time on these platforms, social media ads were first on their brand discovery list, significantly ahead of search engines and on par with TV ads.** This is particularly surprising given where the survey was carried out – as, because the U.S. and UK's internet users skew older, they've typically leaned on traditional channels more heavily. It's testament, too, to the power direct response ads have had.

Brand research also rests on the back of social media, particularly among Gen Z. **Just because the cost of social media ad impressions has dropped, doesn't mean consumers are paying less attention to these adverts – quite the opposite.**

But with consumers' receptiveness to certain social issues heightened, many brands have adopted a new responsibility framework: 47% of consumers across 18 countries say that brands should show their support via social media in response to the Black Lives Matter movement. **This change is throwing new light on advertising content, but also *where* brands choose to advertise,** which is why the latest social media advertising boycott is **arguably** more impactful than those in the past.

Question: Since the coronavirus outbreak, have you discovered any new brands or products via the following?
Source: GlobalWebIndex Custom study, 2-6 April 2020
Base: 2,004 (U.S.) and 1,538 (UK) internet users aged 16-64

EXPLORE DATA

Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?
Source: GlobalWebIndex Q1 2020
Base: 29,468 Gen Z aged 16-23 and 143,232 internet users aged 16-64

Sealing the deal

Social commerce has a lot of potential, but it's still only 13% who say a "buy" button on a social network would most increase their likelihood of purchasing a product. **This does vary depending on the platform and country in question, but the main point is that an uncommitted approach to social commerce won't be enough to put the spending wheels in motion.**

Platforms like Snapchat and TikTok demonstrate real promise, especially as their audience skews young and leans more heavily on influencer culture. Snapchat has recently ramped up its augmented reality tools; in June Gucci became the first brand to launch a shoe try-on Lens. And recognizing the platform's budding potential, several big brands are also moving to TikTok.

But advertising on newer platforms won't ensure success; companies need to understand an audience before determining whether they're a good fit.

DIFFERENT PLATFORMS HAVE DIFFERENT ENERGIES

% of each social platform's visitors/users who want brands to be the following (top over-index)

TikTok users	Snapchat users	Twitter users	Instagram users	Facebook users
Young	Bold	Exclusive	Trendy	Smart
36%	30%	30%	35%	50%
1.44 IDX	1.35 IDX	1.22 IDX	1.19 IDX	1.15 IDX

A "BUY" BUTTON ALONE ISN'T ENOUGH

% of each social platform's visitors/users who say a "buy" button would most induce them to buy

	TikTok users	Instagram users	Facebook users	Twitter users	Snapchat users
	19%	16%	16%	15%	13%
Top countries	Vietnam 23%	Saudi Arabia 19%	Egypt 18%	China 17%	Thailand 17%

Brand messaging should also be tailored to fit the general vibe of each site: TikTok users stand out for wanting brands to be young, while Instagram users take a fancy to those that seem trendy or cool.

Influencers can make a real difference. **Around a fifth of Gen Z in the U.S. and UK have been sharing more influencer content via social media or messaging platforms since the outbreak.** With many turning to brands for support during this time, demonstrating authenticity will be particularly important going forward. Influencers are familiar with the nuances of their local communities and, with consumers' sensitivities sharpened at present, marketers can really benefit from influencer content when crafted in a tactful way.

EXPLORE DATA

EXPLORE DATA

Question: When shopping online, which of these features would most increase your likelihood of buying a product? (Option to use "buy" button on a social network) | Which of these do you want brands to be?
Source: GlobalWebIndex Q1 2020
Base: 33,897 TikTok users, 43,586 Snapchat users, 71,759 Twitter users, 124,267 Facebook users and 99,693 Instagram users aged 16-64

Key implications

- Coronavirus has sparked a massive jump in internet usage. Consumption levels will likely return to normal, but how we think of and use social media has shifted – with lasting implications. Social news hubs have become more in demand and better equipped to handle the threat of disinformation.

- Increased engagement with private channels is a trend that has continued, and even gained speed. Consumers currently have enhanced needs for online social interaction and this will likely bleed into brand engagement. Companies should continue to act preemptively by making themselves increasingly available on these channels.

- Our research highlights the emerging market for virtual events, alongside other forms of video and live content. Livestreaming is set to leave its stamp on certain industries, especially when attitudes toward attending live events remain unsettled. Social and tech companies will have to continue developing and expanding the list of tools available to creators if it's to become an entrenched aspect of people's daily lives.

- While platforms like TikTok and Twitch post lower visitation figures than the main social media giants, they have certain advantages making users and advertisers gravitate toward them. These spaces were designed for creators and influencers, so big names will have to focus on establishing fresh features capable of retaining younger demographics and niche communities.

- Social media is deeply embedded in the purchase journey – most noticeably in a discovery and research setting. While social buying hasn't blasted off in a single moment, and isn't likely to, it's made incremental gains and there are signs this will continue. Brands need to be strategic when selecting a suitable platform, influencer and message in order to create a strong base for a sale.

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 688,000 internet users aged 16-64 across 46 markets. 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.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q1 2020 wave of research across 46 countries, with a global sample of 175,545 respondents.

Argentina	1,559	Morocco	1,009
Australia	4,149	Netherlands	1,294
Austria	1,274	New Zealand	1,273
Belgium	1,297	Nigeria	1,041
Brazil	5,803	Philippines	3,104
Canada	4,816	Poland	1,810
China	24,332	Portugal	1,285
Colombia	1,300	Romania	1,306
Denmark	1,281	Russia	3,660
Egypt	1,812	Saudi Arabia	1,540
France	5,111	Singapore	2,759
Germany	5,115	South Africa	1,556
Ghana	1,006	South Korea	1,268
Hong Kong	1,765	Spain	5,066
India	13,016	Sweden	1,273
Indonesia	5,114	Switzerland	1,265
Ireland	1,261	Taiwan	2,341
Israel	1,284	Thailand	3,947
Italy	5,078	Turkey	2,085
Japan	3,283	UAE	1,812
Kenya	1,047	UK	10,295
Malaysia	1,567	U.S.A.	25,347
Mexico	4,314	Vietnam	2,625

Notes on methodology

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**.

INTERNET PENETRATION RATES: 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 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 2019. 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.

INTERNET PENETRATION RATES

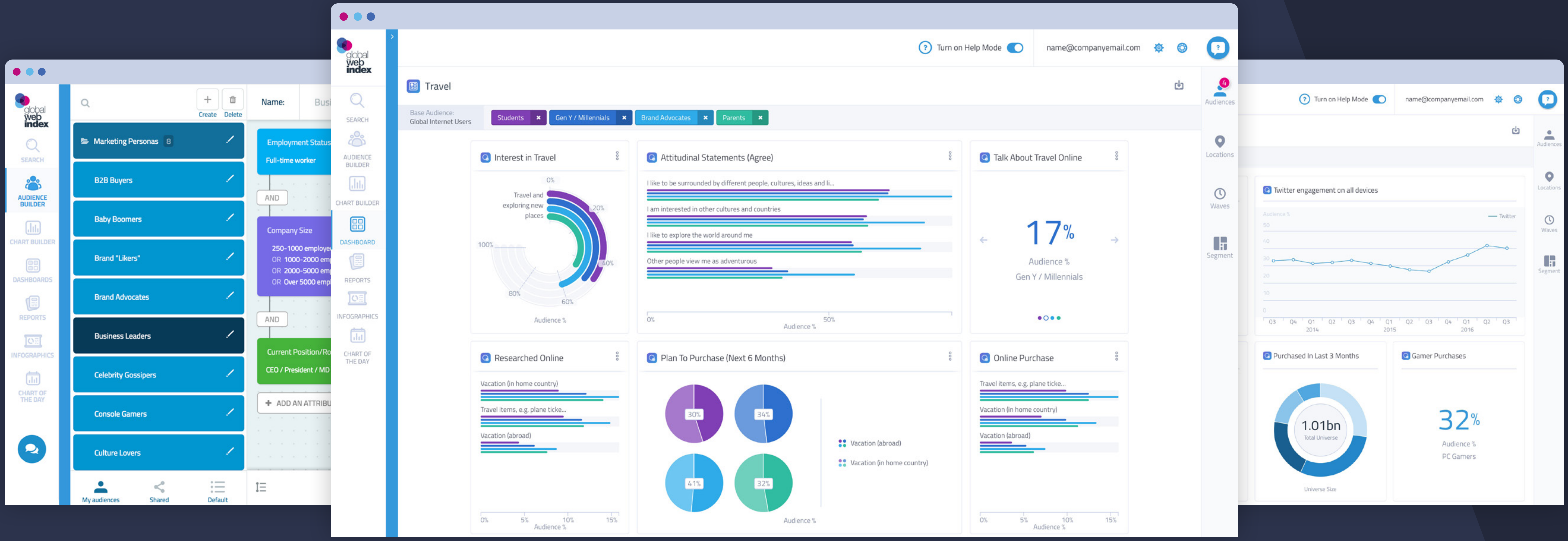
GlobalWebIndex's Forecasts for 2020 based on 2018 ITU data

Argentina	78%	Morocco	69%
Australia	88%	Netherlands	93%
Austria	88%	New Zealand	93%
Belgium	89%	Nigeria	36%
Brazil	71%	Philippines	64%
Canada	94%	Poland	79%
China	59%	Portugal	78%
Colombia	66%	Romania	72%
Denmark	97%	Russia	80%
Egypt	54%	Saudi Arabia	83%
France	85%	Singapore	85%
Germany	88%	South Africa	62%
Ghana	48%	South Korea	95%
Hong Kong	91%	Spain	87%
India	42%	Sweden	96%
Indonesia	39%	Switzerland	96%
Ireland	87%	Taiwan	83%
Israel	85%	Thailand	58%
Italy	62%	Turkey	71%
Japan	92%	UAE	95%
Kenya	43%	UK	96%
Malaysia	83%	U.S.A.	80%
Mexico	69%	Vietnam	55%

Like what you've read?

There's plenty more where that came from. Browse our latest reports and infographics examining key consumer trends across markets.

Access more reports



Get more from your data.

Run your own custom studies using our panel of 22 million consumers, and get instant access to insight tailored to your business needs.

Request custom research

Jason Mander
Chief Research Officer

jason@globalwebindex.com

Chase Buckle
Trends Manager

chase@globalwebindex.com

Shauna Moran
Junior Insights Analyst & Writer

smoran@globalwebindex.com

globalwebindex.com