

Social

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



In this report

GWl's Social flagship provides the most important insights on the world of social media, from keynotes on how attitudes are changing, to the very latest figures for platform engagement. This is done with a particular focus on how COVID-19 has influenced crucial trends.

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Methodology & definitions

All figures in this report are drawn from GWl'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, GWl 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 GWl's Core survey via PC/laptop/tablet.

When reading this report, please note that we use a mixture of data from our ongoing quarterly global research, and insights from our Zeitgeist research and recontact studies throughout

May-November 2020, which are carried out in the U.S. and UK only. Our September Zeitgeist study is the only exception, as it covers the following 7 countries: Brazil, China, France, Germany, India, UK, and the U.S.

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.

China is excluded from most of the global charts featured in this report which track specific/named platforms, though we do have a dedicated section to it on page 28. This is due to the unique nature of the Chinese social media industry, which maintains its own diverse ecosystem of homegrown social platforms and has official restrictions on many global social services. For additional detail on social media usage in China, please consult our [China Market Snapshot](#).

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.

Sneak preview of our new platform

The screenshot displays the GWI platform interface. The top navigation bar includes 'Charts', 'Audiences', and 'Crosstabs'. The main area is divided into two panels. The left panel shows a filter configuration for 'New Audience 7 May 2020 12:33' with attributes like 'Gender > Male' and 'Gender > Female'. The right panel shows a summary for 'New Chart 6 Feb 2020 12:33' with a sample size of 9,188 respondents out of 40,453. Below this, a table displays data points for a specific question: 'Someone in my household has a mental health issue'.

	Data point %	Universe	Index	Responses	Audience %
Someone in my household has a mental health issue	100	15.7K	84.9M	100	47%
	100	15.7K	84.9M	100	32%
	100	15.7K	84.9M	100	52%
	100	15.7K	84.9M	100	38%
	100	15.7K	84.9M	100	16%

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

Initial lockdown spikes in people using social sites to connect are still trending.

In 2019, social networking had become less about connecting than consuming content. Yet, lockdowns initially breathed some life back into the more “social” elements of social media, and our latest wave of data shows a continuation of this trend.

Social media usage during widespread lockdowns has now fallen and stabilized.

The Q2 spike we saw in social media usage hasn't been maintained. Lockdown habits are therefore unlikely to leave a permanent mark on engagement. This does depend on age, however; boomers continue to use social media more than they did at the start of 2020.

Facebook remains the world's most popular social network.

It's true Instagram has taken the reins from Facebook among Gen Zs by establishing its place as their favorite and most-used app. Yet, a high proportion of this generation still use Facebook on a weekly basis, and it remains the leading global platform to date.

Influencers retain a strong hold on consumers, but there's demand for unfiltered content.

2020 sparked a widespread shift in focus, which can be seen in the ideals of influencer followers. Compared to the average, they're much more likely to say learning new skills and contributing to their community is important, and have a varied list of passions beyond travel and beauty.

Entertaining and inspirational content is the key to profitable social commerce.

Our data associates those who use social media to access content like livestreams and stories with an eagerness to buy on platforms. With this in mind, it's little wonder Instagram decided to expand Checkouts to IGTV and Reels, having previously rolled it out to Stories.

The psychology of social media

Usage remains high, but trust hangs low

The morality of social media has long been debated, and our data shows that positivity toward the impact of social networking is generally on the low side. But ultimately, **95% of the online population continue to use social websites or apps.**

Among other things, consumers have come to depend on them for connecting, entertainment, and news updates; so the discussion should really center around **how platforms can earn back the trust of their steady user base.**

European and North American internet users show the least positivity toward social media in general. These regions have also seen slight but consistent drops since Q2 2020, with recent events highlighting the potential **real-world** consequences of social networking.

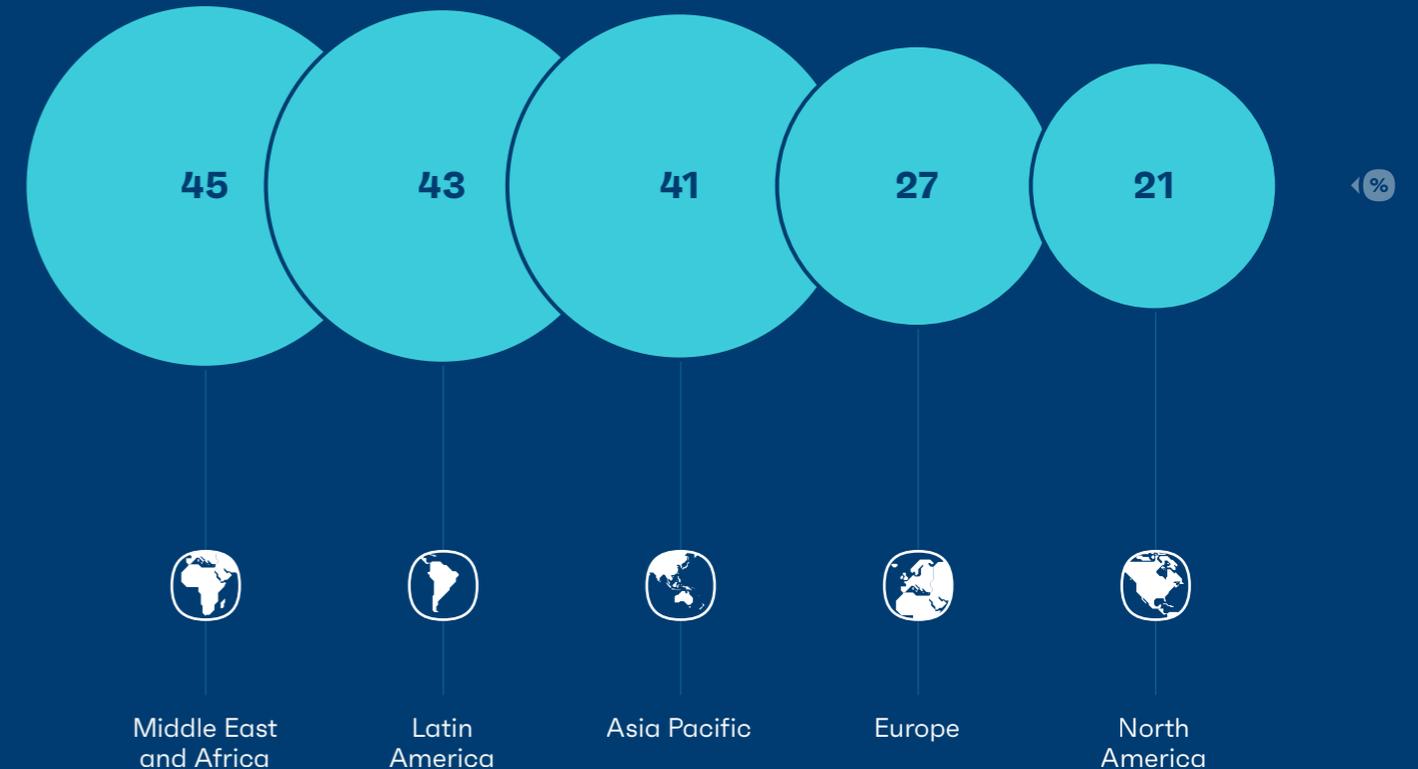
Platforms now have an opportunity to stand out in this part of the world and take the lead in changing public opinion. For example, YouTube and TikTok are rewarding **creators** for endorsing prosocial usage; and **Facebook News**, a

section of the site dedicated to news-reading in the U.S. and UK, will congregate articles from various prestigious outlets to promote authoritative journalism and fight disinformation.

While agreement over the benefits of social media is stronger in MEA, Latin America, and APAC, no region sees positive sentiment go above 50%. **The tactics that drive success in Western countries will eventually serve as examples of best practices, even in areas boasting some of the world's most hopeful networkers.**

Where the world's most hopeful social networkers are based

% of internet users in the following regions who think social media is good for society



GWI Core Q4 2020



180,852 internet users aged 16-64

Putting the meaningful back into social media

Up until the end of 2019, our data showed social media becoming less about connecting than consuming content. But back in August, we observed the **pandemic** breathing some life back into the more “social” elements of social media – with people relying on these platforms to replace the physical interactions they’d lost.

And our latest wave of data shows a continuation of this trend: keeping in touch with loved ones is now cited as the top reason for logging on. This is even the case among Gen Zs, who consume content on these platforms in much larger doses.

Though, they do subvert the general order in some cases. They’re the only generation equally as likely to use social media to follow famous people as to receive updates from brands – which

highlights the importance of partnering with influencers when targeting this demographic.

Using networks to see what’s trending is also on par with reading news stories, which accounts for this generation’s enhanced appetite for apps like Snapchat and Reddit. While they often passively consume content, many want to participate in emerging trends and long to impress their followers.

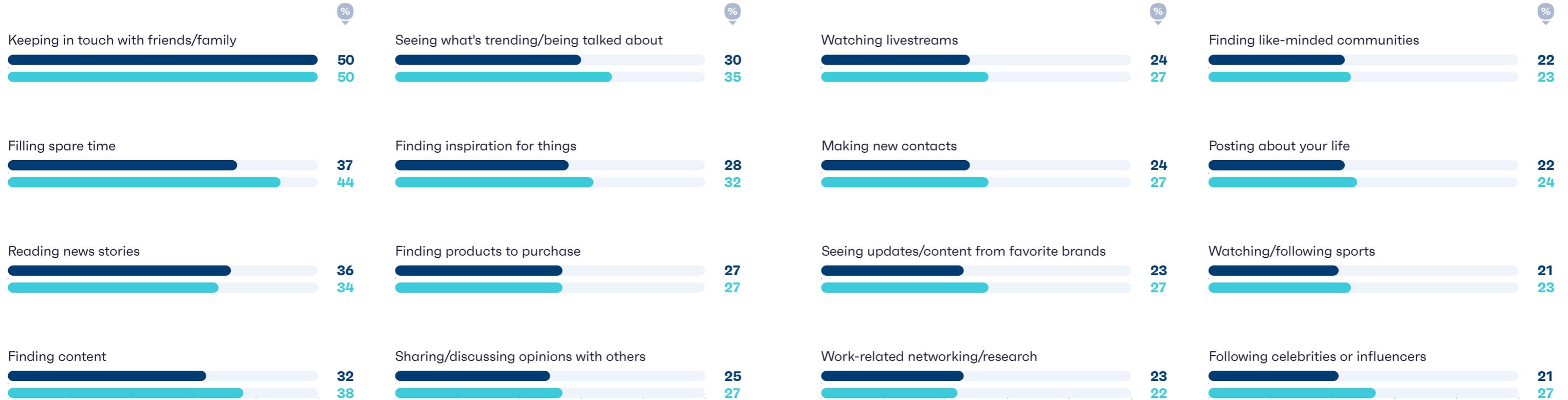
So despite the return of more “traditional” incentives for using social media, we should be aware of how it continues to evolve – which is well-demonstrated by Gen Z. A good example is livestreaming, with around 1 in 4 consumers now listing them as a leading motivation, even with China excluded; such figures were unheard of pre-pandemic.



The many faces of social media

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

● All internet users ● Gen Z (aged 16-23)



GWJ Core Q4 2020 180,852 internet users aged 16-64, and 37,473 Gen Zs aged 16-23

02

Tracking time spent

Daily time spent on social media

Average time spent using social networks on an average day in h:mm

	2017	2018	2019	2020
Argentina	3:12	3:17	3:20	3:23
Australia	1:39	1:34	1:46	1:48
Austria	1:16	1:15	1:18	1:22
Belgium	1:31	1:31	1:34	1:41
Brazil	3:40	3:39	3:40	3:41
Canada	1:48	1:47	1:50	1:45
China	1:58	2:00	2:13	2:01
Colombia	-	3:34	3:46	3:40
Denmark	-	1:35	1:35	1:39
Egypt	3:06	3:05	3:02	2:51
France	1:24	1:22	1:36	1:41
Germany	1:13	1:08	1:19	1:24
Ghana	2:59	3:09	3:07	3:21

	2017	2018	2019	2020
Greece	-	-	-	1:50
Hong Kong	2:00	1:53	1:55	1:55
India	2:25	2:28	2:28	2:29
Indonesia	3:26	3:23	3:18	3:19
Ireland	1:45	1:55	1:53	1:51
Israel	-	-	1:59	2:02
Italy	1:53	1:48	1:51	1:50
Japan	0:46	0:40	0:44	0:48
Kenya	2:50	2:59	3:16	3:33
Malaysia	3:06	3:03	2:56	3:03
Mexico	3:11	3:14	3:21	3:25
Morocco	2:22	2:34	2:30	2:34
Netherlands	1:24	1:17	1:19	1:21

Despite starting to plateau in 2019, time spent on social media gained new ground in 2020 – climbing in 32 of our 47 tracked markets

	2017	2018	2019	2020
New Zealand	1:49	1:42	1:46	1:51
Nigeria	3:03	3:26	3:30	3:46
Philippines	4:00	4:08	4:00	4:05
Poland	1:42	1:45	1:54	1:56
Portugal	2:13	2:12	2:10	2:19
Romania	-	2:34	2:20	2:18
Russia	2:20	2:21	2:28	2:21
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	1:53
Sweden	1:54	1:49	1:49	1:49

	2017	2018	2019	2020
Switzerland	1:18	1:19	1:18	1:22
Taiwan	2:06	1:52	1:53	1:53
Thailand	3:06	3:14	2:57	2:47
Turkey	2:49	2:52	2:56	3:00
UAE	2:56	3:00	3:03	3:06
UK	1:54	1:51	1:47	1:46
U.S.	2:02	2:05	2:01	2:08
Vietnam	2:36	2:33	2:23	2:22

GWI Core Q1 2017-Q4 2020 (averages of all waves conducted each year)
 370,051 (2017), 474,573 (2018), 598,185 (2019) and 714,817 (2020) internet users aged 16-64

Lockdown upticks in usage have stabilized

Average time spent by each demographic using social networks on an average day across 2020 in h:mm



ad
 GWI Core Q1-Q4 2020
 714,817 internet users aged 16-64

The social usage journey throughout 2020

Hot on the heels of Latin America, MEA now boasts some of the world's most active social media users, with countries like Kenya (+17 mins), South Africa (+17), Nigeria (+16), and Ghana (+14) having made the most headway from a global perspective since 2019.

There was a universal uptick in Q2 (April-June), as countries started going into lockdown; the global figure then fell, before stabilizing. Restrictions did generate noticeable increases in usage, but they were ultimately one-offs, and we've since returned to pre-pandemic levels.

This does depend on age, however. Younger consumers still spend the most time on platforms, but their initial spikes were the first to settle down. In contrast, boomers are using social media more than they did at the start of the year, with their Q2 peak largely being maintained. **Holding a lot of purchasing power, this group's heightened presence on social sites should be addressed by marketers in 2021.**

We cover the online habits of Gen X & boomers in more detail within our annual Connecting the dots [report](#).

The impact on mental health

An increase in time spent on social media does have implications, as our data links higher levels of usage with enhanced feelings of anxiety. **Overall, younger consumers feel the connection between social media and mental health most strongly.** Gen Zs are more prone to anxiety in general, and have been badly affected by the pandemic, so we can expect this tension to resonate in other social interactions – including online ones.

Various initiatives have taken steps to lighten their emotional load, like

Snapchat's "**Here For You**" campaign. Such schemes are well-positioned to succeed as this generation feels more comfortable turning to social media (36%) than medical professionals (29%) for support with their mental wellbeing.

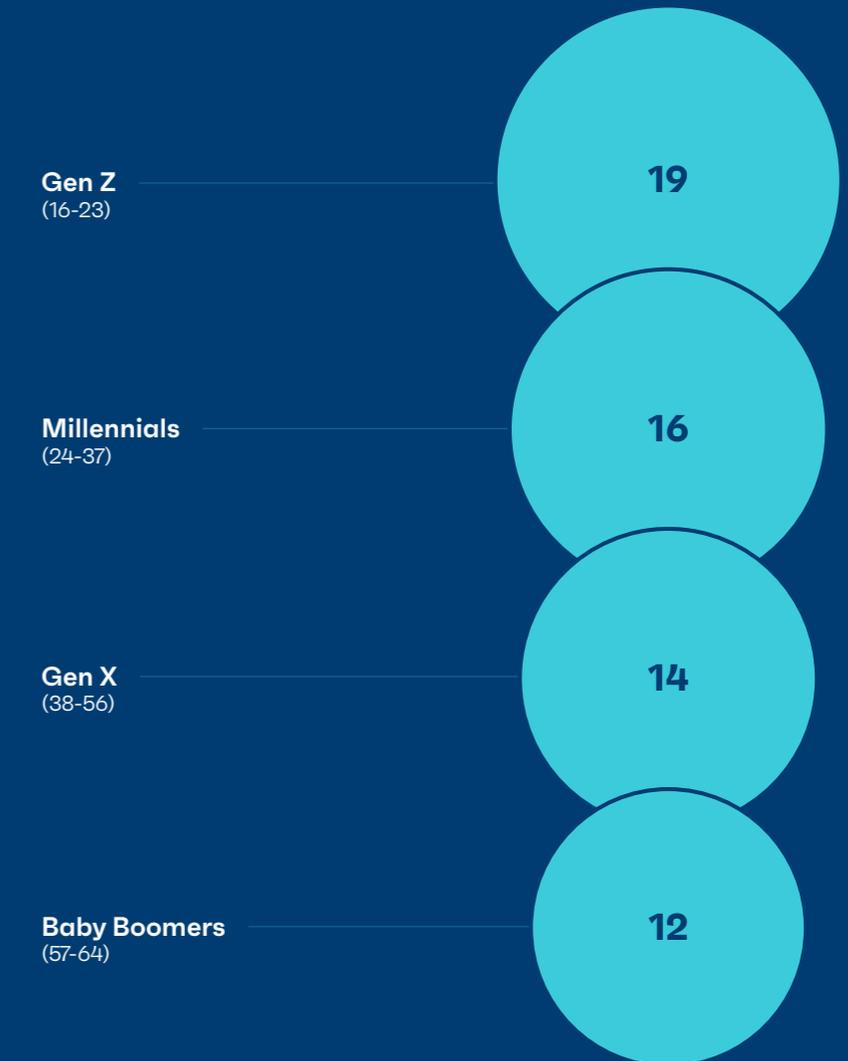
Understandably, demand for digital wellbeing tools has inched back up to pre-pandemic levels, and companies are moving fast to make worthwhile investments. Having the necessary tools doesn't guarantee successful results though. Heavy networkers are more likely than average to worry

about their usage levels, but less likely to have succeeded in cutting back. **While their awareness is relatively high, many would benefit from further guidance.**

It's up to brands to fill in the gaps and encourage healthier habits. In 2020, TikTok asked leading **influencers** to tell its users to stop scrolling and go outside, and the platform's working with Barnardo's Children's Charity to launch a webinar on **screen time**. This shows how social media companies can work alongside brands to protect consumers.

Social media's impact on mental wellbeing is most heavily felt by younger consumers

% of internet users in each generation who say social media causes them anxiety



Engagement with the siblings of social media: gaming and online dating

During the pandemic, both gaming and online dating platforms started to resemble fully-fledged social media.

A survey we conducted in May 2020 uncovered demand among potential online daters for game setups, synchronized movies, and virtual speed dating events. Apps like Hinge and Bumble were quick to add in-app video chat features and encourage people to get imaginative with online dates. Virtual speed dating events on Facebook groups even managed to spice up this year's Valentine's Day in the West.

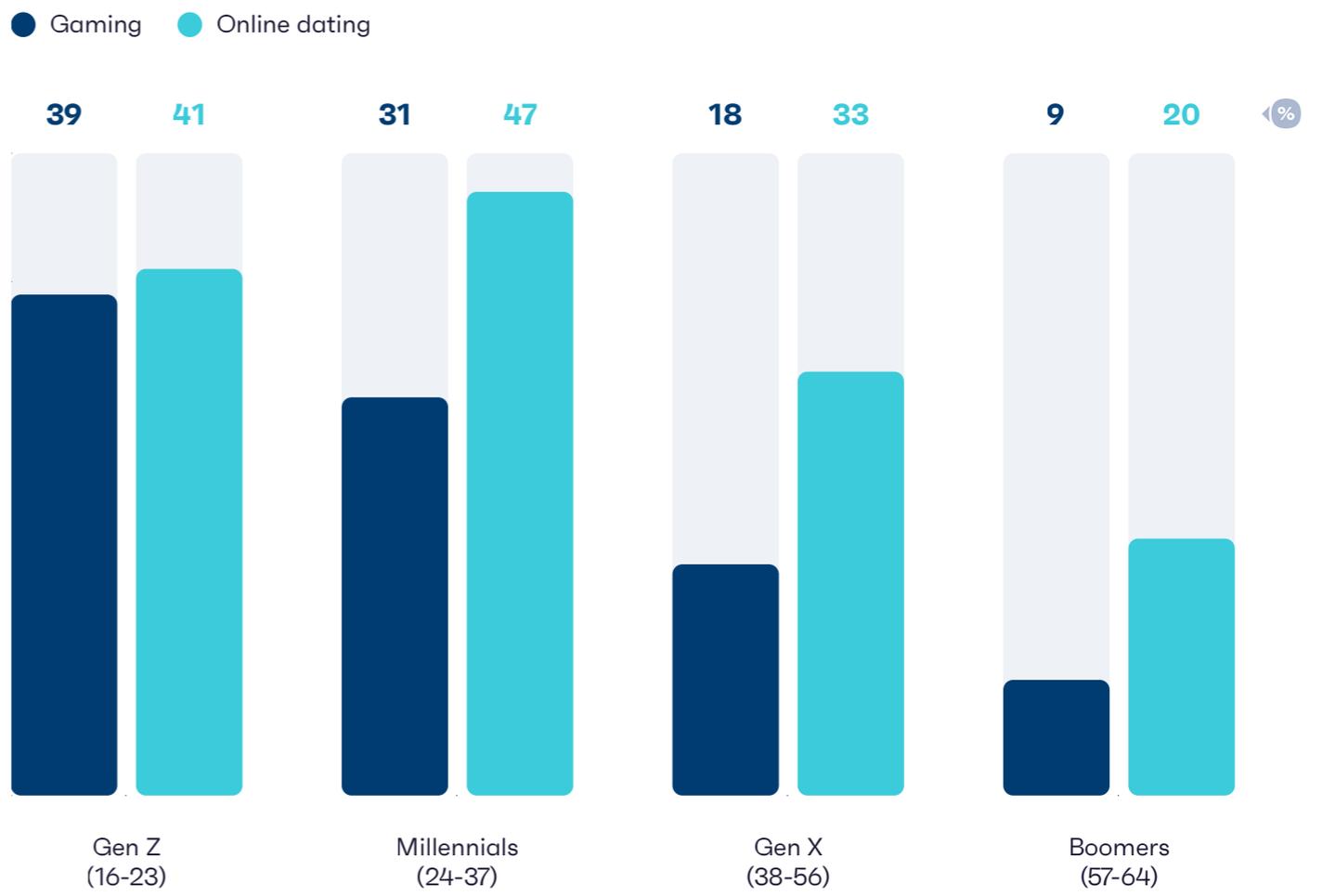
The gaming industry opted for similar tactics, as consumers used video games to socialize during lockdowns – with a fifth of gamers in the U.S. and UK citing this as a main reason for playing in

October. Among other new features, the latest PS5 controller includes a microphone that lets users chat in-game without a headset, which hints at where industry players are likely to make future investments. Ultimately, it's best to stay on the ball; as, like social media, engagement with games consoles has seen its initial Q2 spike level off.

Both industries have prioritized developing or marketing their most social and inclusive offerings. Facebook Gaming has created a series spotlighting over 100 inspiring women, who openly discuss their time in the industry to help others feel more at home on the app; and Tinder launched an interactive series called Swipe Night to highlight the conversational power of shared experiences.

Gaming vs online dating

% in each group who have played a game online with their real-life friends and/or have used an online dating service on any device in the last month



GW I Core Q4 2020 180,852 internet users aged 16-64

Lining up the leading platforms

Facebook remains resilient

Despite reports of **Facebook deleters** growing in ranks, **it remains the world's most popular social network**.

Breaking down platform engagement by generation also reveals more nuance. **While a high proportion of Gen Zs still use Facebook on a weekly basis, it falls significantly behind Instagram in popularity.** A quick glance back at their motivations for using social media explains this; they stray from the standard by ranking

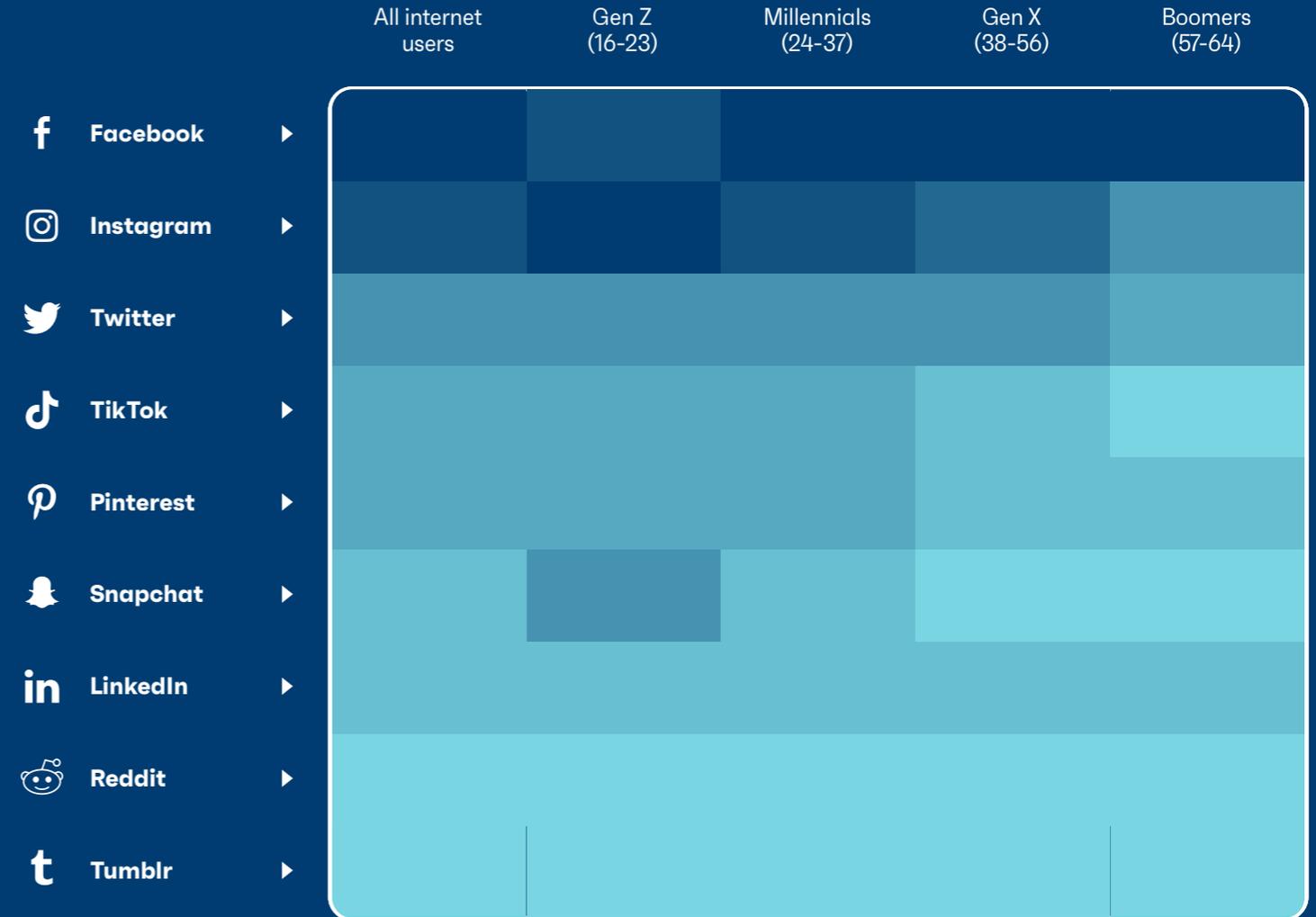
content consumption and trending topics above news stories.

Yet, social media users of all ages are paying more attention to whether platforms tackle the threat of misinformation and work to promote social justice. Facebook is responding by testing changes to its News Feed that would downrank **political content**, and has been active in removing **conspiracy theories** discouraging vaccination.

Want a closer look at how Facebook engagement is changing? [Try the platform for free.](#)

Weekly usage of social media

% of internet users in each category who use the following platforms weekly



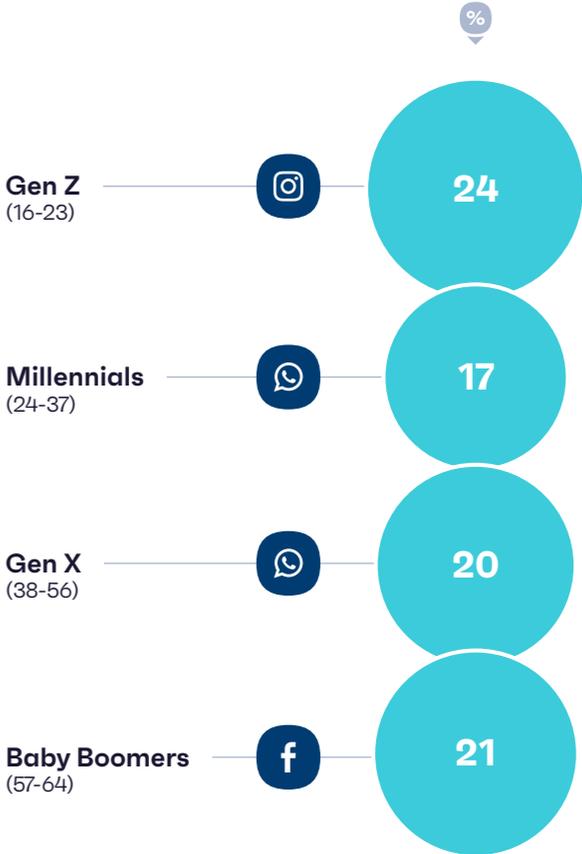
Every market has its favorite

% in each market who say the following is their favorite service

Country	Platform	%
Argentina	WhatsApp	38
Australia	Facebook	29
Austria	WhatsApp	39
Belgium	Facebook	26
Brazil	WhatsApp	39
Canada	Facebook	26
China	WeChat	46
Colombia	WhatsApp	39
Denmark	Facebook	34
Egypt	Facebook	41
France	Facebook	29
Germany	WhatsApp	43
Ghana	WhatsApp	44
Greece	Facebook	35
Hong Kong	WhatsApp	41
India	WhatsApp	30
Indonesia	WhatsApp	41
Ireland	WhatsApp	28
Israel	WhatsApp	50
Italy	WhatsApp	42
Japan	LINE	36
Kenya	WhatsApp	44
Malaysia	WhatsApp	33
Mexico	Facebook	39
Morocco	Instagram	26
Netherlands	WhatsApp	46
New Zealand	Facebook	30
Nigeria	WhatsApp	41
Philippines	Facebook	49
Poland	Facebook	43
Portugal	Facebook	31
Romania	Facebook	41
Russia	VK	26
Saudi Arabia	WhatsApp	26
Singapore	WhatsApp	37
South Africa	WhatsApp	41
South Korea	Kakao Talk	58
Spain	WhatsApp	43
Sweden	Facebook	24
Switzerland	WhatsApp	43
Taiwan	LINE	51
Thailand	Facebook	45
Turkey	Instagram	40
UAE	WhatsApp	35
UK	Facebook	22
USA	Facebook	28
Vietnam	Facebook	49

The top in each age bracket 8

% in each generation who say the following is their favorite service



Want our latest market and regional insights? Our market **snapshots** offer an easy way to discover the digital consumer in your area.

GW I Core Q4 2020
180,852 internet users aged 16-64

Will 2021 be YouTube's year?

Outside China, YouTube comes before every other TV, video, or film service we track when it comes to monthly engagement.

YouTube Kids, the company's stand-alone app built for children, was only launched in late 2019. It therefore scores relatively low for monthly engagement, but has seen considerable success in Asian countries like Vietnam and the Philippines.

In spite of these offerings, YouTube still has several tricks

up its sleeve. Shorts, its TikTok-like functionality, already gets 3.5 billion views each day. Like YouTube Kids, this feature is set to see higher consumption figures in coming years, should the service succeed in raising more awareness.

The platform is also working to enhance its ecommerce capabilities by enabling **creators** to tag the products showcased in their videos. **This move will facilitate broader opportunities for shopping within the app and expand its use cases.**

51% of U.S./UK consumers use YouTube to research or find products to buy



Changes in China

WeChat has long been at the forefront of China's list of homegrown platforms due to its multi-functionality.

While keeping in touch with friends and family is currently the top reason for using social media in China, **the gap between this motive and others is much lower**. For example, the percentage difference between the former and watching livestreams is 15 points in China, and 39 in the U.S. – a sign that social media fulfils a much wider brief here than in the West.

Tencent dreams of WeChat becoming an app that covers *all* bases; and 46% of Chinese consumers say it's their favorite platform, putting it miles ahead of the next competitor, Douyin (15%).

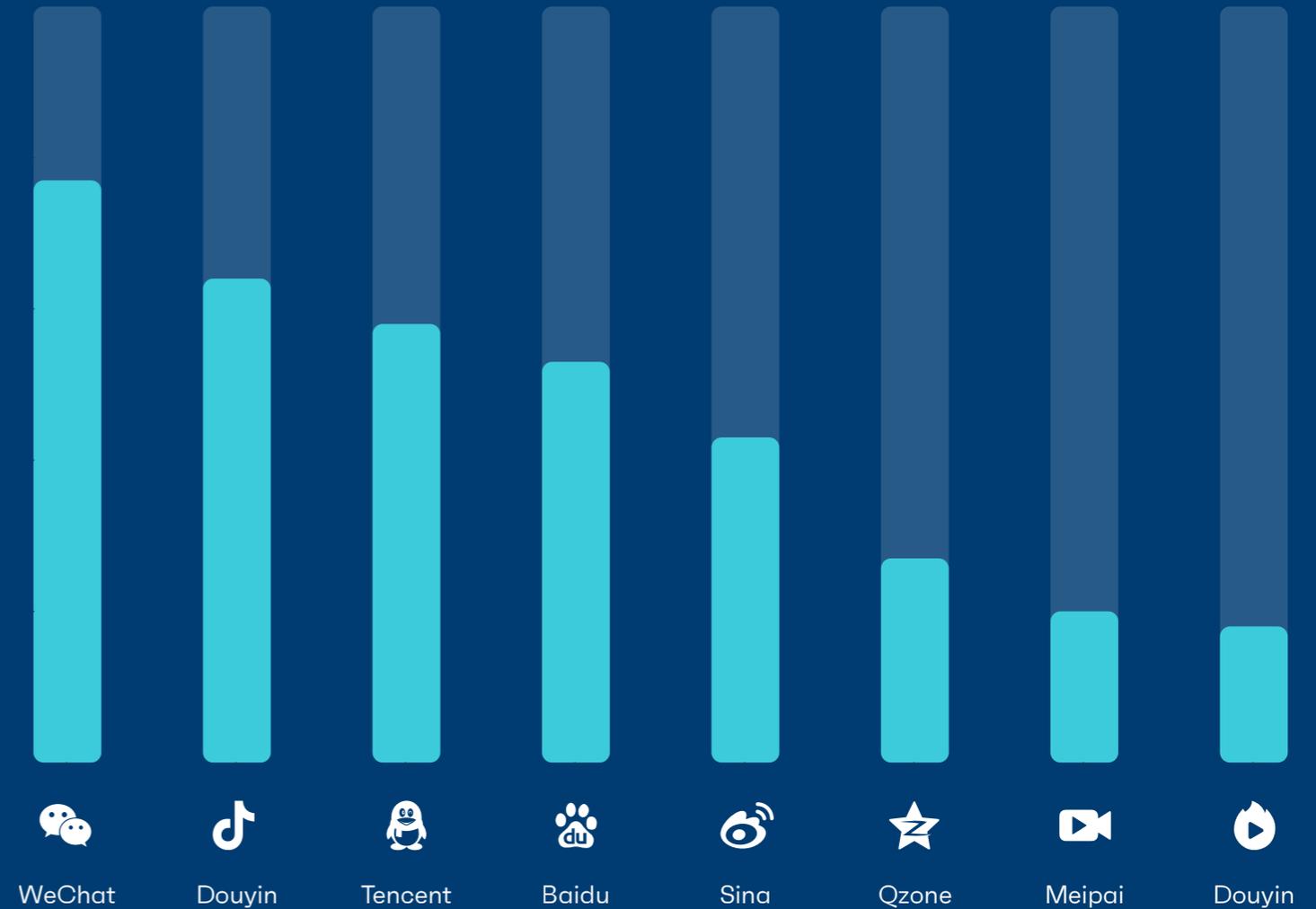
That being said, Douyin (the Chinese version of TikTok) is starting to leave a

greater mark on the social space. In 2019, WeChat had a 47 percentage-point lead on Douyin; **since then, the rift has closed between WeChat and its contenders**. According to Bytedance, **Douyin** surpassed 600 million daily active users last August, which is a 50% increase from 400 million in January – with the platform adding free **movie streaming**, an **e-wallet**, and **live podcasts** to its list of offerings in 2020.

Livestreaming-specific apps like Yizhibo once created a **precedent** for WeChat and Douyin, who quickly integrated this technology into their platforms. And now, audio-focused social apps like Dizhua, Tiya, and Yalla have risen in popularity alongside Clubhouse's growing visibility in the West. With Clubhouse **blocked** in China, there's fresh opportunity for homegrown solutions to bring the audio-chat phenomenon into the mainstream.

China's main social players

% of internet users in China who visit the following services weekly



04

Keeping tabs on behavioral trends

Where we're at with Stories

Stories may be short-lived, but they can leave a lasting impression on viewers and brand followers by showcasing the people and meaning behind an organization in a more laid-back and authentic way.

Snapchat was the first to introduce ephemeral content, and its users still have the highest engagement rate with this format; though it's achieved popularity among Instagram and Facebook users as well. **In fact, more Instagram users create their own Stories each month than Snapchat users.**

With additional features like Q&As, polls, and shopping tags, Instagram Stories are particularly beneficial for brands and influencers as they drive participation.

Swell – a brand selling stylish, reusable water bottles and containers – uses polls to share pertinent information by quizzing their audience on eco-friendly topics and revealing some surprising answers. **And these tools can also be used for customer feedback, market research, or purely for entertainment.**

Instagram is developing **a vertical Stories feed**, similar to that of TikTok, and looking to make them more **desktop-friendly**. **As it continues to innovate, and other platforms follow suit, Stories' ability to enhance brand-consumer relationships and drive meaningful conversations will only strengthen. It's up to brands to create inspiring, topical, and ongoing narratives.**

Stories aren't just for Snapchatters

“If brands want their audience to know something, they should wrap exciting, memorable content around that something and repeat, repeat, repeat”

– Christina Moravec, Marketing Manager at Zyl

% of each platforms' users who have done the following in the last month

10



 GWI Core Q4 2020
43,829 Snapchat users, 107,584 Instagram users, and 132,764 Facebook/Facebook Messenger users aged 16-64

The future of AR in social media marketing

Many of us remember Pokémon GO taking the world by storm in 2016, and the latest word from Sensor Tower is it's even more **successful** now than during the launch. The app's augmented reality (AR) features are its main selling point, which **gives us some context into the demand for such technology and what it could do for social media.**

Lenses and filters are tools that enable users to customize images by transforming the way they look and the world around them. On Snapchat, geofilters even augment hot spots within local communities.

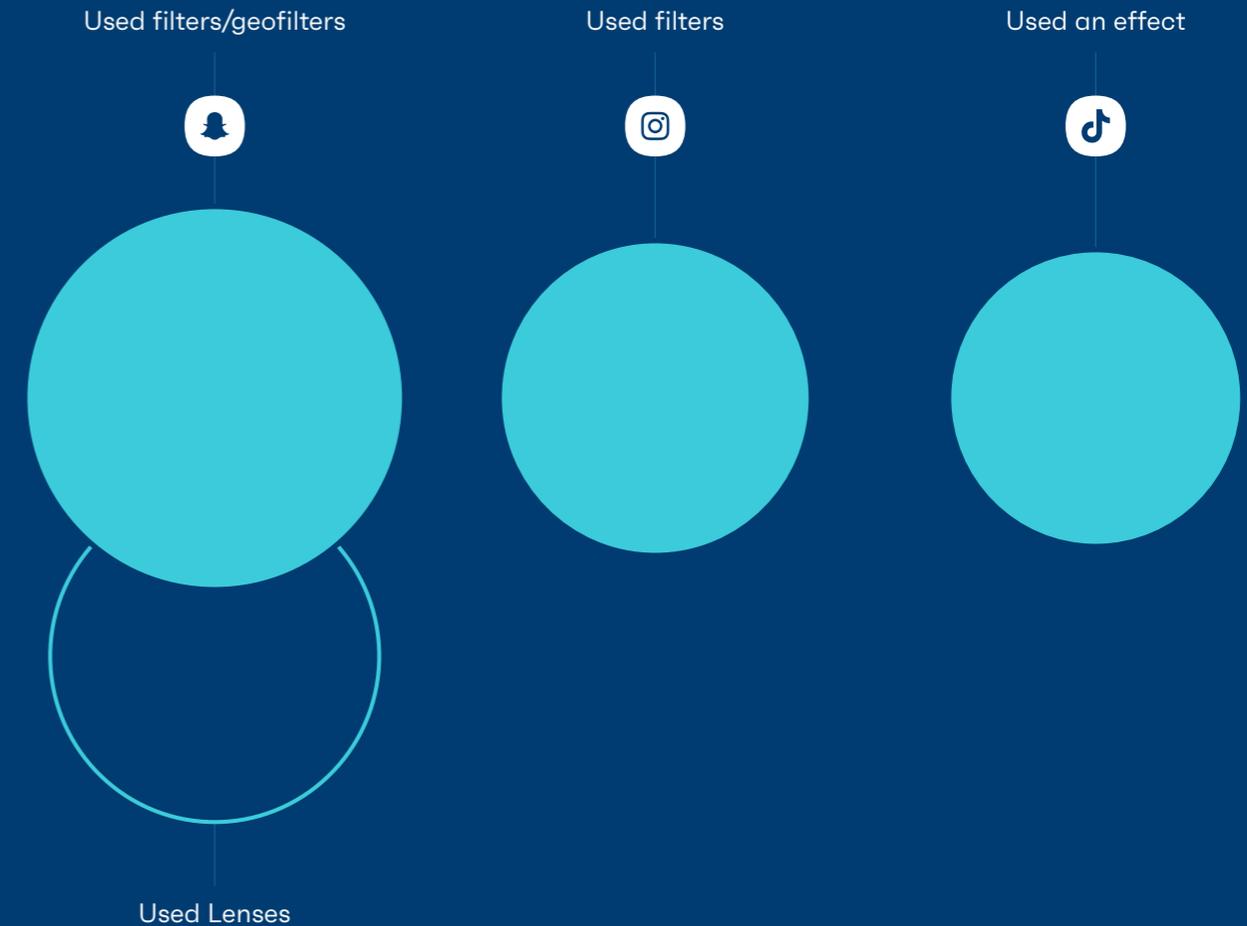
Our audience of filter users over-index most for being interested in things like urban art and they travel much more than the average. They're also keen for brands to enhance their online image, so features addressing this group's impulse to celebrate their lifestyle and share cultural experiences are positioned to do well.

Instagram and TikTok users aren't far behind Snapchat's in terms of enthusiasm. TikTok effects have helped various influencers and brands in their efforts to go viral. Michael DiBenigno, the cofounder of an **AR startup**, teamed up with a Chicago professor to produce content on the spread of COVID-19 in the U.S. Their **video**, which heavily leant on AR, generated 2.2 million views, 323,000 likes, and 3,500 comments.

What's more, AR is particularly useful in the current climate. Due to the COVID-19 pandemic, only 22,000 fans were permitted to watch this year's Super Bowl in person. As a result, several brands adopted **AR effects** to create immersive and shareable experiences. Pepsi, for example, added QR codes to its packaging, allowing fans to access exclusive videos and custom filters when scanned. **AR therefore has the potential to enhance other campaigns, as well as support creators.**

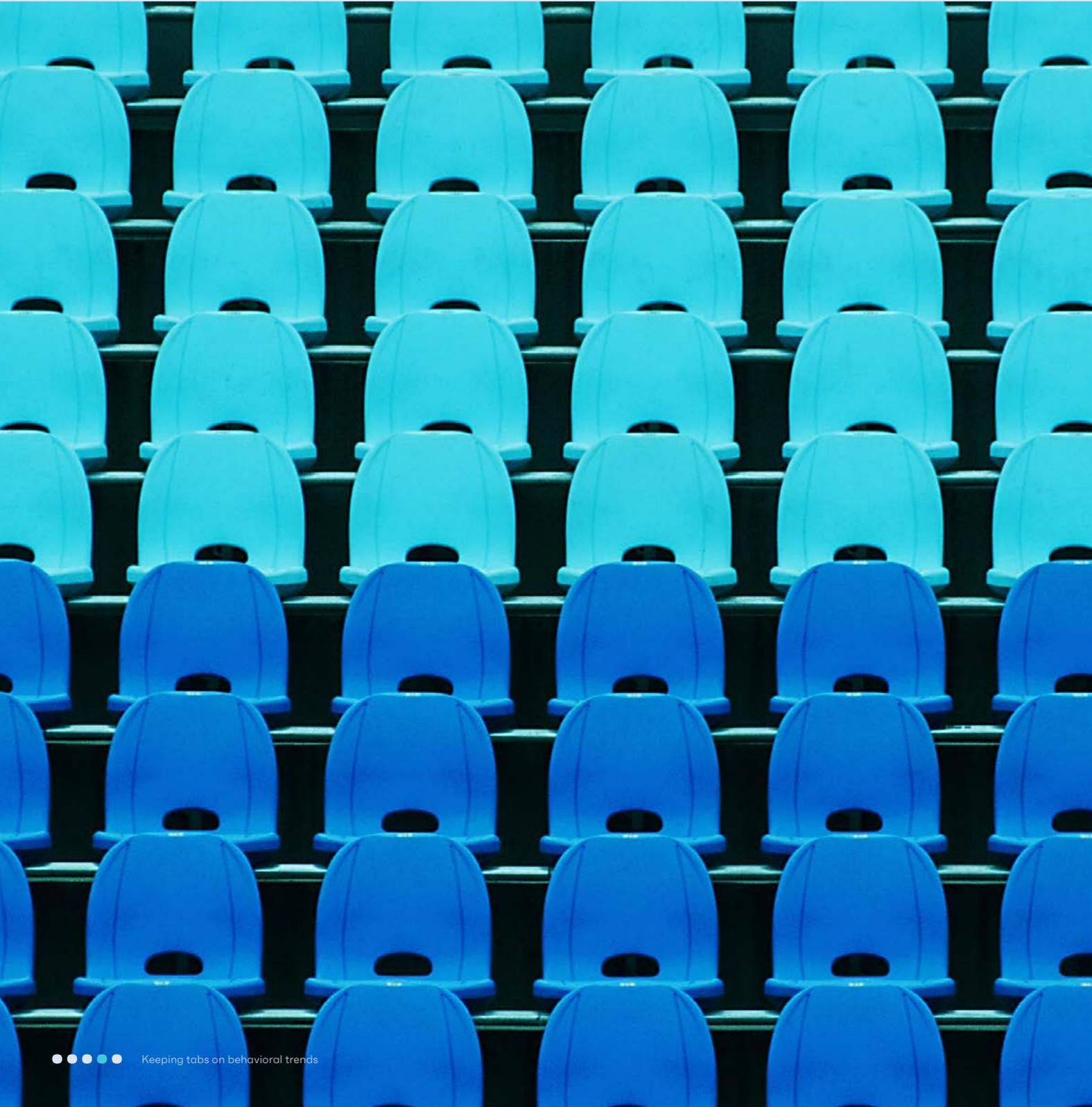
The latest AR has to offer

% of each platforms' users who have done the following in the last month



GWJ Core Q4 2020

107,584 Instagram users, 43,829 Snapchat users, and 65,522 TikTok users aged 16-64



The distinct stamp of social platforms

12

% of each platforms' monthly visitors who mainly use the service for the following

Facebook/Messenger

- 1 Message friends/family
- 2 Post/share photos or videos
- 3 Keep up-to-date with news/the world

Instagram

- 1 Post/share photos or videos
- 2 Find funny/entertaining content
- 3 Follow/find information about products/brands

Pinterest

- 1 Follow/find information about products/brands
- 2 Find funny/entertaining content
- 3 Post/share photos or videos

Reddit

- 1 Find funny/entertaining content
- 2 Keep up-to-date with news/the world
- 3 Follow/find information about products/brands

LinkedIn

- 1 Keep up-to-date with news/the world
- 2 Follow/find information about products/brands
- 3 Post/share photos or videos

TikTok

- 1 Find funny/entertaining content
- 2 Post/share photos or videos
- 3 Keep up-to-date with news/the world

Snapchat

- 1 Post/share photos or videos
- 2 Find funny/entertaining content
- 3 Message friends/family

Twitter

- 1 Keep up-to-date with news/the world
- 2 Find funny/entertaining content
- 3 Follow/find information about products/brands

 GWI Core Q4 2020  167,125 social networkers aged 16-64

The power of Pinterest

Around 4 in 10 Pinterest users log onto the site to research brands and products, making discovery a lot more likely. What's more, the majority seek purchase and life-style inspiration, which has been in high demand during the pandemic. This makes it an ideal spot for brands hoping to bolster their online sales.

Home décor, food, and fashion are the top categories among Pinners. As expected, interest in these categories is much higher among women, but men take the lead when it comes to seeking fitness, travel, and family inspiration; so sellers operating across the latter three industries shouldn't overlook them when creating content for the site.

And even more Gen Zs are monthly users, which puts them above other generations. Compared to other 16-23 year olds, this group over-indexes most for being interested

in DIY and environmental issues. Pins that appeal to their dreams of a wholesome home and planet are therefore primed for success.

In a similar vein, U.S. Pinners are especially eager when it comes to food inspiration. With 1 in 5 Americans using food box services, there's an excellent opportunity for CPG brands to demonstrate what can be achieved using their products.

Ecommerce-driven brands in the above-mentioned industries ultimately stand to benefit from investing in Pinterest, particularly as it continues to introduce features that facilitate buying and selling. Last May, the platform enabled **Shopify merchants** to feed their whole product catalog directly into shoppable Pins, and product tagging for influencers on their **Story Pins** is reportedly in the works.

Pinterest: a place for aspirational shoppers

% of Pinterest users who have used the site for the following in the last month

13



GWI Core Q4 2020 52,430 Pinterest users aged 16-64

How livestreams empower online communities

The pandemic created a gap for virtual live events to fill, as many began craving human connection. A report we published in July on **virtual interactions** showed its long-term potential, with 51% in the U.S. and UK saying they planned to communicate online to the same extent once restrictions were lifted.

In the same way users know those in their Reddit community or Facebook group share similar interests, livestreams tend to draw in like-minded crowds.

Early on **Bon Appetit's** Test Kitchen crew hosted a livestream from their kitchens and living rooms, filled with cooking challenges, games, and company updates. And on a smaller scale, the Facebook group **Come Dine Online With Me** offered livestreams and tutorials, while encouraging members to share their creations, which serves as a good

example for local retailers or D2C brands.

Companies should be thinking along these lines, and aim to create online communities centered around the themes or interests most relevant to them. **Creating enclosed spaces will encourage people to open up and share experiences, enhancing brand loyalty in the process.**

Selecting appropriate influencers to host livestreams builds trust, while finding ways for viewers to participate before, during, and after an event through activities like challenges and Q&As will drive social interaction and sentiments of belonging. This is largely the appeal behind the trending invite-only, audio-based app, **Clubhouse**, which provides an intimate setting for communities across the spectrum.

Going live, and growing bonds

% of each platforms' users who have done the following in the last month 14



GWI Core Q4 2020
 65,522 TikTok users, 132,764 Facebook/Messenger users, 22,138 Reddit users, and 45,062 LinkedIn users aged 16-64

The deal with social shopping

Social media in the early stages

Overall, search engines (34%) and ads seen on TV (33%) remain the most common modes of brand discovery. Ads on social platforms are only just behind, but carry even more weight when combined with our other social media-specific options.

Close to half typically find out about new brands or products via social media ads, recommendations, or updates on brands' pages – up from 32% in 2017.

What's more, this figure witnesses jumps across MEA, APAC, and Latin America, reaching

unprecedented highs in places like Kenya (73%), Nigeria (72%), and the Philippines (67%). **With a considerable number using these sites to find products to buy, for purchase inspiration, or to see updates from their favorite brands, social media is clearly a space where advertising content isn't just expected, but often desired.**

The portion of consumers using social networks to research brands has increased by 5 points since 2017, also inching its way up to half of all internet users. Though not all platforms are equal in this

respect; as fondness for online social research peaks among Instagram and Snapchat users, with Pinners being the most likely to discover brands.

In addition, brands should invest in niche networks alongside the main players. Q&A sites, forums, and messaging apps are all common research spots. Industry will dictate the right channel to some degree; travel enthusiasts favor Q&A and consumer review sites when seeking information, while those with an interest in beauty stand out for their use of online pinboards.

Brand discovery

15

% in each category who typically find out about new brands via the following

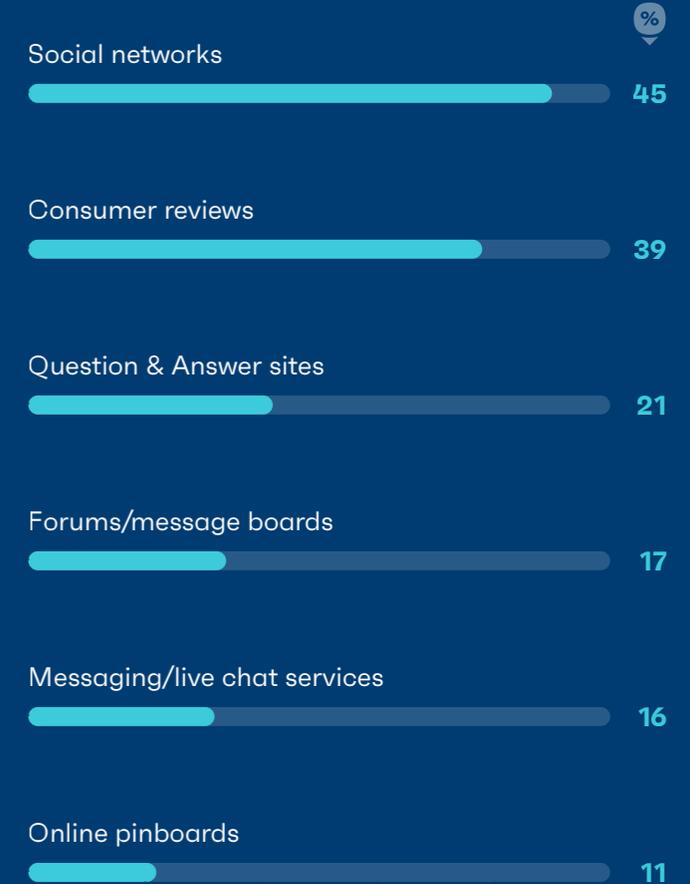


GWI Core Q4 2020
180,852 internet users aged 16-64

Brand research

16

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



GWI Core Q4 2020
180,852 internet users aged 16-64

The social justice stakes are higher

Like never before, consumers are calling on brands to lead the fight against coronavirus, support the vulnerable, and take a stance on important social issues – with social media being a prime vehicle for communication. Across 7 countries, nearly as many want brands to focus on treating staff fairly (44%) and being vocal about social causes (41%), as on producing high-quality products (49%).

While some businesses are worried about potentially alienating customers, the consequences of refusing to open up this kind of dialogue are often greater, given a fifth of millennials would think twice about buying from a brand lacking in political or social activism. Younger consumers increasingly expect companies to broadcast

advocacy, and those that don't risk growing stale or irrelevant.

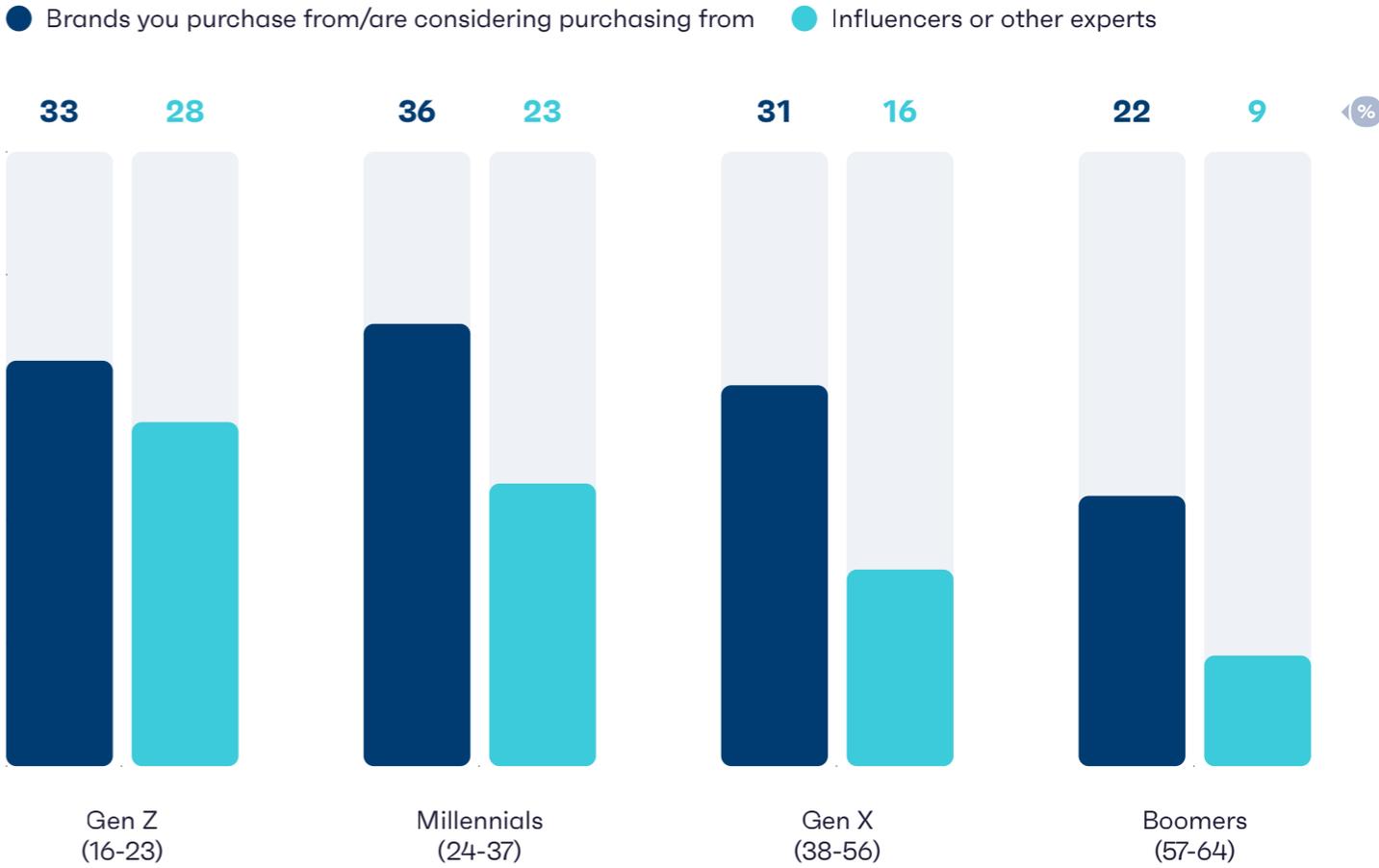
Panda Express' Instagram account is a good example of highlighting a specific brand purpose and reiterating it over time. It consistently demonstrates solidarity and support for minorities across the States. Last June, the company **donated** \$1M in books written by authors of color to over 500 Boys & Girls Clubs, in the hopes of addressing perceptions at an early age; and its latest **donation** to Asian Americans Advancing Justice again promotes a fair and equitable society for all.

We cover the kindness economy in more detail within our annual Connecting the dots **report**.



Gen Z follow influencers almost as much as brands

% in each generation who subscribe to the following social media accounts



How the tide has changed for influencers

A group of influencers came under serious fire in January after they traveled to Dubai for a photoshoot under the label of “essential” work. Consequently, several **reality stars** lost thousands of followers, causing some to speculate about the kind of place influencers have in our post-pandemic world.

Ultimately, our data demonstrates the strong hold they have on consumers, particularly younger generations – with Gen Zs being almost as likely to follow influencers as brands. Especially now typical brand-building tools like physical retail have taken a backseat, and mental health is suffering, influencers are a valuable tool to help brands engage with customers in a more human, empathetic, and personal way.

Writer Chloe Combi argues 2020’s **ideological shifts** caused young people to shift their focus onto “true role models” and away from polished influencers. This aligns with several aspects of our data; **in Q4 2020,**

influencer followers were much more likely than other consumers to say challenging themselves, learning new skills, and contributing to their community was important to them.

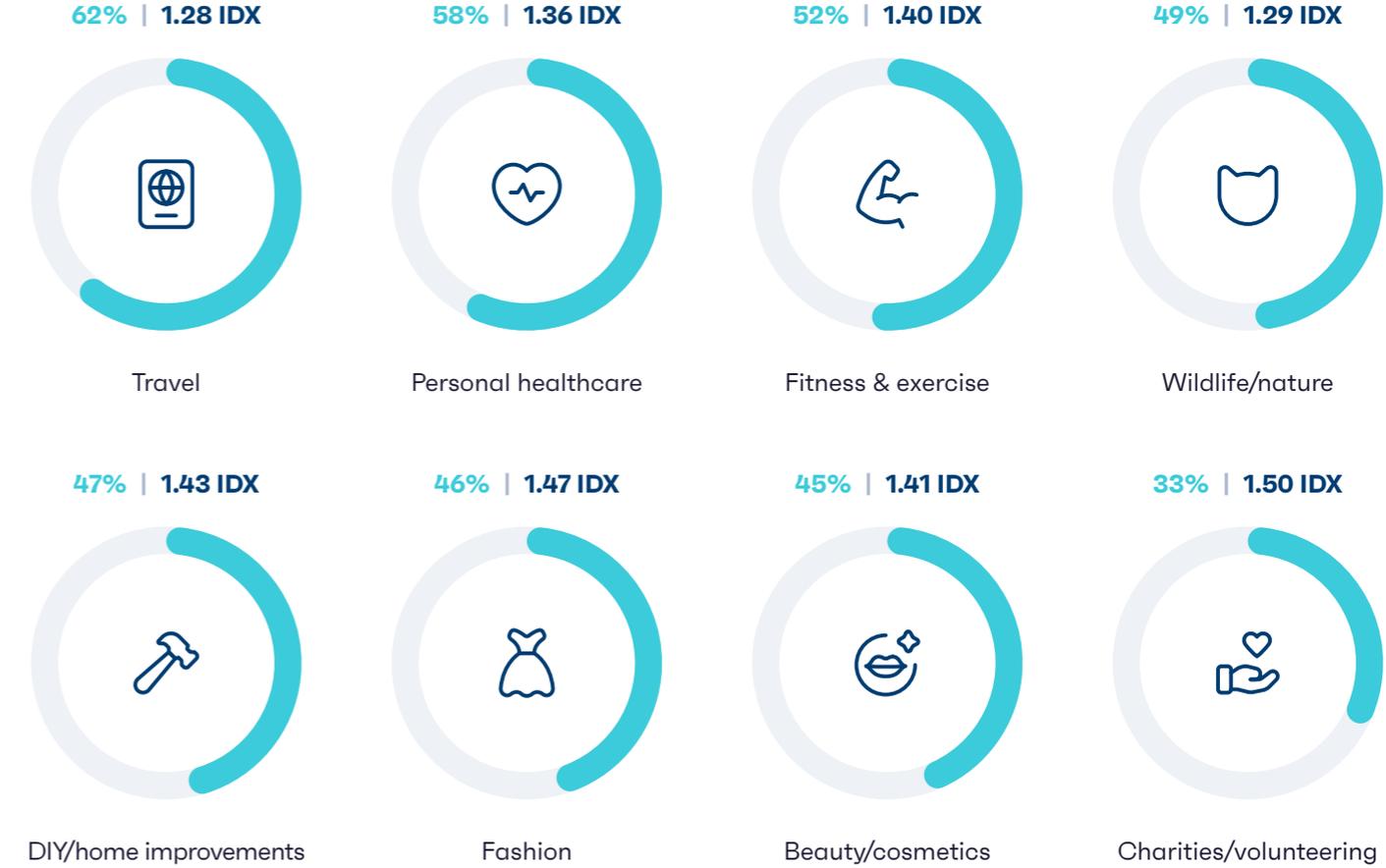
Influencer followers also have a varied list of passions beyond travel and beauty. They over-index for being interested in personal healthcare, wildlife, DIY, and volunteering. The gap between personal healthcare and beauty/cosmetics is actually wider among influencer followers than the average, which underscores their emphasis on wellness and self-care. **So it’s not that influencers have less potential, but that followers want more raw, unfiltered content, which they currently relate to better than glitzy backdrops.**

Influencers that offer lifestyle tips and encourage people to open up and express their frustrations, while voicing their own, are best-placed to engage their followers in a meaningful way.



Influencer followers have a varied list of interests

% of influencer followers who are interested in...



GW I Core Q4 2020 180,852 internet users and 38,049 influencer followers aged 16-64

The social commerce race is speeding up

Facebook Marketplace helps people discover, buy, and sell items within their local communities. **And the feature's expansion into new markets has facilitated its evolution.**

Facebook Marketplace recently launched in **Nigeria** – joining other MEA countries like South Africa. It therefore has the potential to go big in this part of the world, while working to curb the spread of coronavirus and bolster local businesses in the process.

Instagram Shopping was introduced much later than Facebook Marketplace, and understandably hasn't attained the same level of reach just yet. **But there's an appetite already developing for it, particularly among millennials.**

Our **Work dataset** shows that 38% of knowledge workers say their company has a work-related Instagram account, a 20% increase since Q1 2019. And around a third of this group say their profile is used for the purpose of selling. In response to the rising number of organizations marketing on Instagram, the platform has introduced a **professional dashboard** for businesses and creators.

Alongside Facebook, TikTok and Instagram users come out on top when it comes to following brands and seeking information about products on social media. Both platforms are hoping to claim a larger share of the ecommerce action, and only time will determine a victor.

Sites with their own ecommerce functionalities

% of each platforms' users who have used the following in the last month



Facebook Marketplace



Instagram Shopping Bag

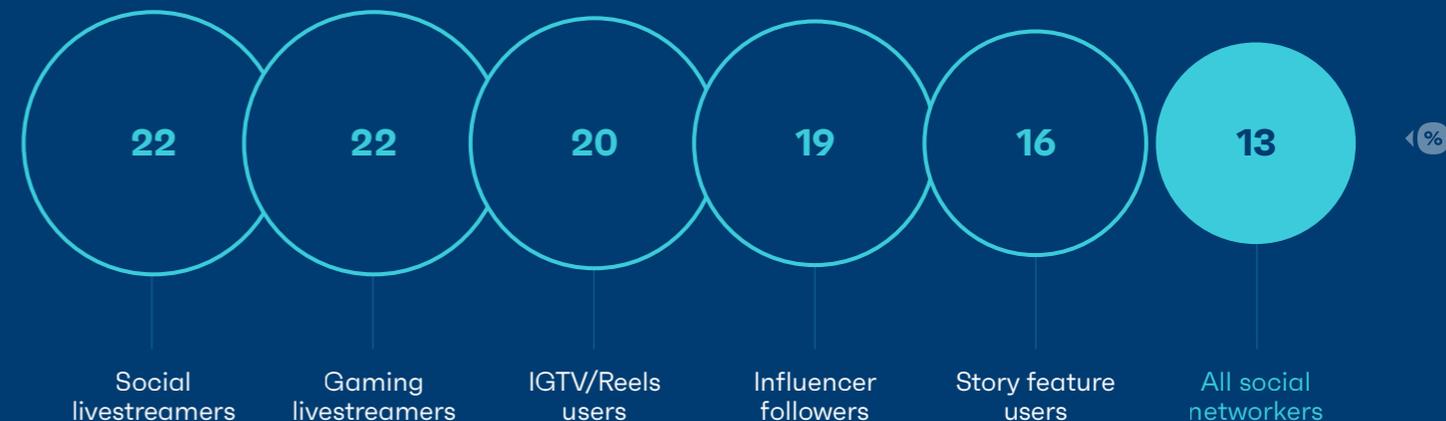
The top channels for clicking on sponsored or promoted posts

% of each platforms' users who have clicked on a sponsored/promoted post in the last month



Social selling is bolstered by content

% of internet users in the following categories who say a “buy” button is a top purchase driver



When content and commerce collide

Our data shows that 13% of social networkers would be most inspired to make a purchase by a “buy” button. Yet, **this just means they prioritize other incentives like free delivery, not that many wouldn’t be tempted to make unplanned purchases from brands telling compelling stories on social media.**

Platforms are continuously adding new functionalities and features that make content more shoppable – and these are happening in line with increased demand for social entertainment.

Our data associates those who use social media to access content like livestreams and

stories with an eagerness to buy on platforms. A fifth of IGTV and Reels engagers show enthusiasm toward buying through social sites, so it’s little wonder Instagram has decided to expand **Checkouts** to both these features, having previously rolled out the ability to buy via Stories.

While fashion categories like **apparel and accessories** remain the most relevant, other lifestyle brands looking to market **food & beverage, health products,** and **home décor** are also key players.

As leading platforms offer increasingly innovative tools, those most able to leverage

social commerce as it matures are best-positioned to succeed in the future. It’s also worth remembering that shopping experiences need to feel at home on specific apps; so brands will benefit from repurposing and adapting content to fit the distinct vibe of each site.

For example, Guess’ Facebook posts do things like highlight nostalgic **campaigns** and **interview** models for those interested in the culture of fashion, and often showcase its **family aesthetic.** In contrast, the brand’s **TikTok page** is saturated with glamorous and creative clips of influencers making good use of the app’s effects, as well as hosting challenges like **#InMyDenim.**

The main vibes on leading platforms

% of each platforms’ users who want brands to be the following (sorted by over-index)



GWK GWI Core Q4 2020
 121,244 social networkers aged 16-64; 41,188 social livestreamers, 38,049 influencer followers, 9,474 gaming livestreamers, 40,913 IGTV/Reels users, and 89,376 Story users

Appendix

Survey questions used per chart

- 1 Which of the following do you feel describes you? (I think social media is good for society)
- 2 What are your main reasons for using social media?
- 3 On an average day, how long do you spend on social media?
- 4 On an average day, how long do you spend on social media?
- 5 Which of the following do you feel describes you? (I feel using social media causes me anxiety)
- 6 Thinking about gaming, which of these things have you done? (Played a game online with your real-life friends) | In the past month, which of the following things have you done on the internet via any device? (Used an online dating service/app)
- 7 How often do you visit or use these services? (At least weekly)
- 8 Which of these social networks would you say is your favorite?
- 9 How often do you visit or use these services? (At least weekly)
- 10 What have you done on Snapchat/Instagram/Facebook in the last month?
- 11 What have you done on Snapchat/Instagram/TikTok in the last month?
- 12 Which platforms/services do you use to do the following?
- 13 What have you used Pinterest for in the last month?
- 14 What have you done on TikTok/Facebook/Reddit/LinkedIn in the last month?
- 15 How do you typically find out about new brands/products?
- 16 Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?
- 17 Which social media accounts do you follow or subscribe to?
- 18 Which of these things are you interested in?
- 19 What have you done on the following social platforms in the last month?
- 20 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?

Notes on methodology

Introduction

All figures in this report are drawn from GWI'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.

Figures referring to our COVID-19 research are drawn from Wave 5 of a custom recontact study, among 15,271 internet users, fielded in 18 countries between June 29-July 2 2020. Countries included Australia, Belgium, Brazil, China, France, Germany, India, Italy, Japan, New Zealand, the Philippines, Poland, Romania, South Africa, Singapore, Spain, the

UK and the U.S. Our custom data considers where the pandemic has advanced or undercut key trends.

Our research

Each year, GWI interviews over 700,000 internet users aged 16-64 across 47 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 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 Q4 2020 wave of research across 47 countries, with a global sample of 180,852 respondents.

Argentina	1,491	Morocco	1,008
Australia	3,995	Netherlands	1,241
Austria	1,245	New Zealand	1,239
Belgium	1,248	Nigeria	974
Brazil	5,499	Philippines	2,988
Canada	4,780	Poland	2,008
China	24,105	Portugal	1,243
Colombia	2,499	Romania	1,253
Denmark	1,502	Russia	3,515
Egypt	1,675	Saudi Arabia	1,512
France	5,018	Singapore	2,750
Germany	4,983	South Africa	1,492
Ghana	896	South Korea	1,877
Greece	1,278	Spain	4,998
Hong Kong	1,779	Sweden	2,494
India	14,037	Switzerland	1,499
Indonesia	5,012	Taiwan	2,244
Ireland	1,247	Thailand	3,766
Israel	1,511	Turkey	2,001
Italy	4,995	UAE	1,782
Japan	4,878	UK	10,007
Kenya	993	USA	24,475
Malaysia	2,835	Vietnam	2,682
Mexico	4,303		

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, please download this [document](#).

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 to the right) 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 GWI's markets

GWI'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.

Internet penetration rates (GWI's Forecasts for 2020 based on 2018 ITU data)

This table provides GWI forecasts on internet penetration (defined as the number of internet users per 100 people) in 2020. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GWI conducts online research in.

Argentina	80	Morocco	67
Australia	89	Netherlands	95
Austria	89	New Zealand	94
Belgium	90	Nigeria	50
Brazil	75	Philippines	67
Canada	94	Poland	80
China	62	Portugal	79
Colombia	68	Romania	76
Denmark	98	Russia	85
Egypt	54	Saudi Arabia	90
France	86	Singapore	90
Germany	92	South Africa	64
Ghana	50	South Korea	97
Hong Kong	92	Spain	90
India	45	Sweden	96
Indonesia	42	Switzerland	96
Ireland	87	Taiwan	90
Italy	77	Thailand	59
Israel	88	Turkey	76
Japan	93	UAE	98
Kenya	40	UK	96
Malaysia	84	USA	90
Mexico	71	Vietnam	70

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Bought something online in the last week



Posted a comment in a forum

1/4

buyers say blogs are very influential when researching a new product



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