Social

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

GWI.

In this report

GWI'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. It offers an update on long-standing trends, but also highlights any noteworthy changes over the past year.

Click the dots to navigate

Methodology & definitions

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

Each year, GWI interviews over 700,000 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 may differ as some will include all respondents, and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet.

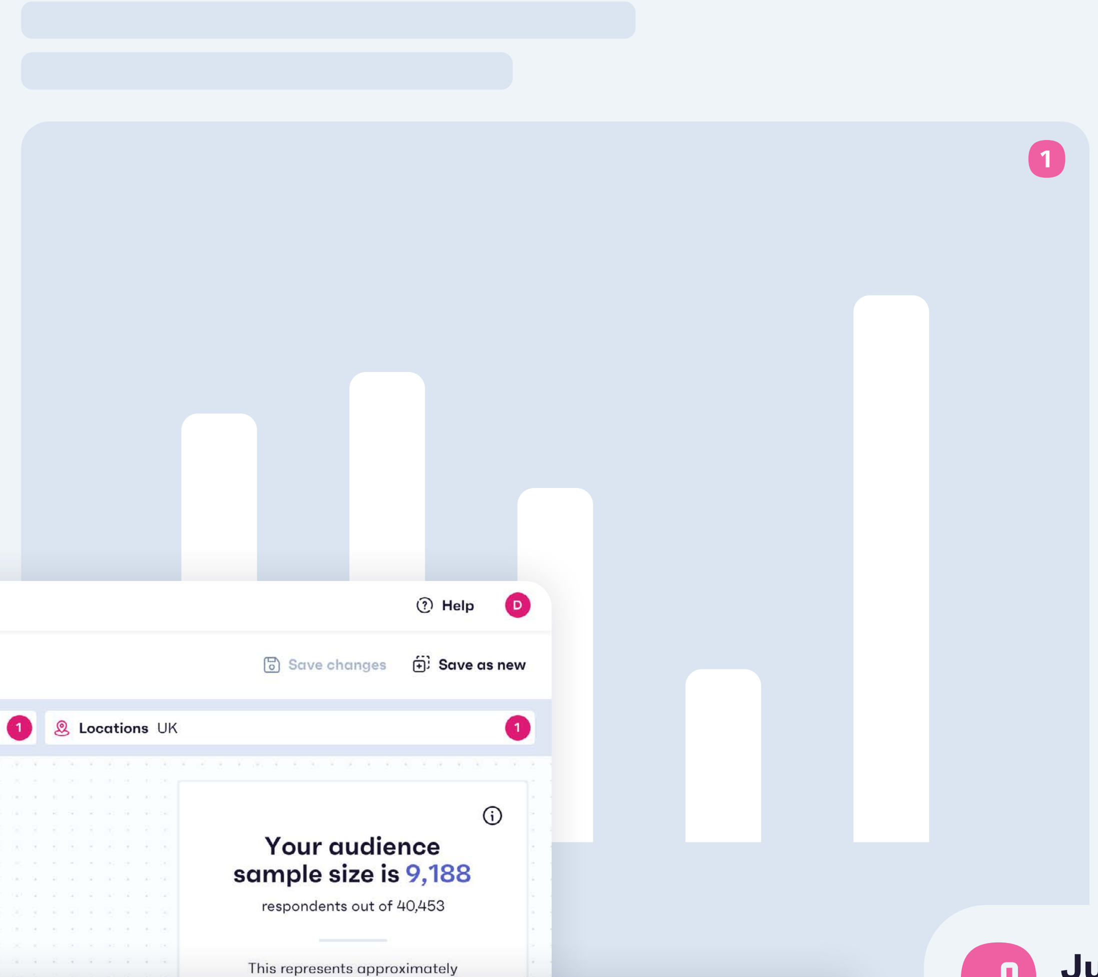
When reading this report, please note that we focus on data from our ongoing global quarterly research, but also draw on other research: GWI Zeitgeist, GWI USA, GWI Work, and GWI Custom. GWI Zeitgeist is a recontact study that we carry out monthly in 9 markets; GWI USA surveys over 20,000 internet users in the U.S. aged 16+ each quarter; GWI Work is conducted in 17 countries, and interviews over 28,000 business professionals aged 16-64; and GWI Custom is a recontact study that we carry out in the U.S. and UK only.

Throughout this piece of work, 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 global charts that track specific platforms. This is due to the unique nature of the Chinese social media industry, which maintains its own ecosystem of homegrown platforms, and has official restrictions on many global social services. We have a section dedicated to this market on page 30.

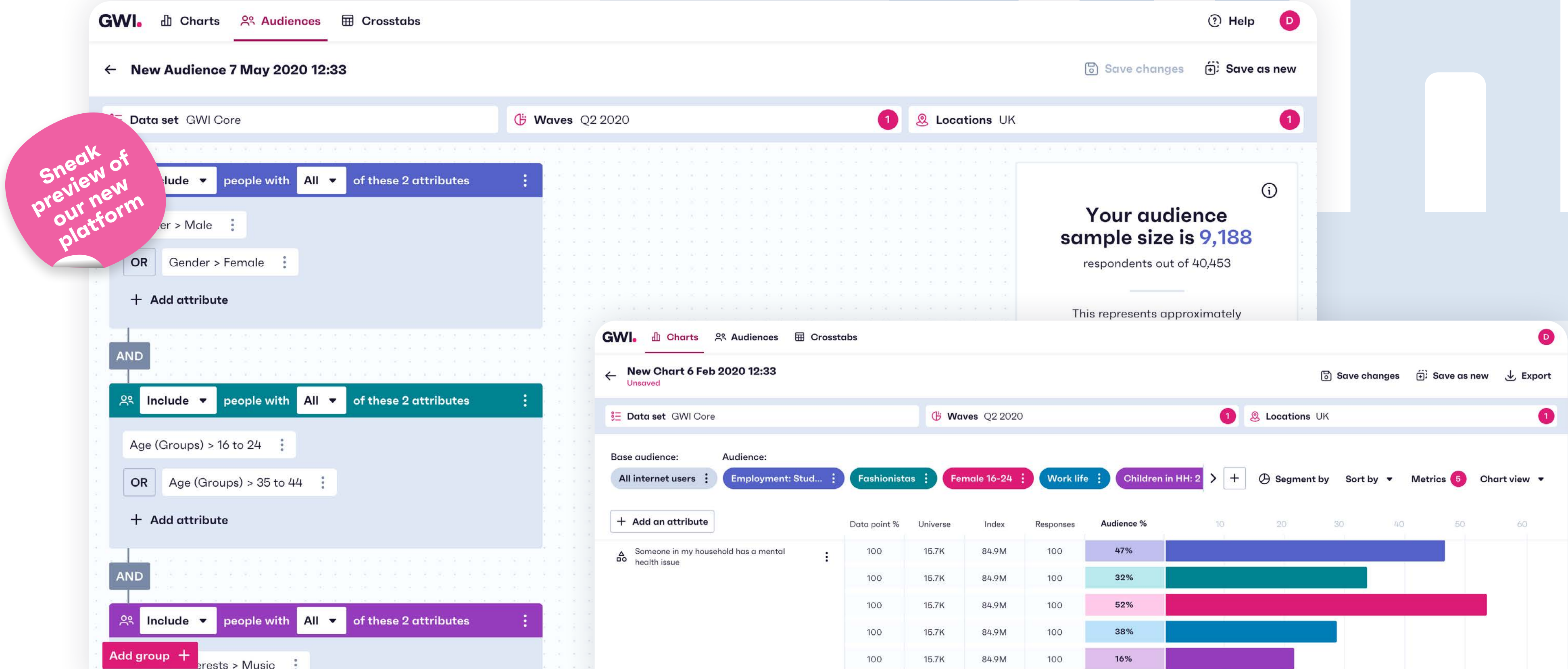
Discover the data on our platform

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 your own audiences.



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 / **Base** — Information about the source and base

Key insights

Social media engagement has plateaued globally

Q2 2020 boasts the highest figures on record for global social media usage as widespread lockdowns forced consumers to find ways to fill their free time. Engagement has fluctuated a little since, but ultimately leveled off. MEA bucks this overall trend, with its consumers still making leaps in usage.

TikTok continues its impressive growth

Since 2020, the number of consumers using TikTok monthly has gone from 32% to 43%. Despite its youthful reputation, engagement has grown the most among Gen X and baby boomers. Its popularity doesn't show any signs of slowing and older consumers have a hand in this trend.

Western social media is following in China's footsteps

Social media typically fulfils a wider brief in fast-growth markets like China than in the West. However, our data suggests change is coming. Compared to 2020, people in North America are more likely to log onto platforms with commercial activities in mind.

Short-form video is most popular, but long-form lands well with Gen Z

Outside China, 61% of social media users say they view or create a story on Snapchat, Instagram, or Facebook at least monthly, and there's been a rise in engagement with Reels. It's not all about bitesize content though – Gen Z are just as likely to be watching 20+ minute videos as they are <4 minute ones.

Social buying has made a lot of headway and is set to spread

Despite security worries, engagement with Facebook Marketplace and Instagram Shopping has gone up by 8% since 2020. Brands can drive progress by inspiring UGC – which will raise awareness – and help prevent cart abandonment by taking feedback on board.

01

Time spent on social media

Social media usage has plateaued

Since Q2 2021, time spent on social media has increased in 32 of the 47 countries we track, with consumers in MEA upping their usage by around 20 minutes in the space of a few months. This sounds promising, but after taking a step back, we can see that global engagement has generally slowed down.

Time spent on social media has been a bit of a rollercoaster over the last 5 years. Between 2014-2018, the average time spent on networks was making steady strides forward, increasing by almost 40 minutes. The numbers then started to plateau in 2019, only to be interrupted by the pandemic. Q2 2020, when around half the world's population was under some form of lockdown, still boasts the highest figures on record for global usage. Back then, the long-term impact of this uptick wasn't clear; but it is now. Engagement has fluctuated a little, but ultimately leveled off. If we take MEA out of the equation, the global average is what it was three years ago.

Since 2020, there's been a 12% rise in people saying they use social media less than they used to

Time spent yet to exceed pandemic heights

As vaccines give more people the confidence to venture outdoors, **competition** for their spare time is bound to intensify. New Year's resolutions offer clues into upcoming trends, and compared to 2020, this year's participants are more likely to have settled on traveling more (+24%) and spending less time on social media (+9%). For now, social platforms are maintaining the hold they have on users' time, but an attention recession could see action-based metrics gain even more relevance, and others like views to become less dependable; these could simply be a reflection of consumers spending less time scrolling, and not the true effectiveness of a brand's campaign or social strategy.

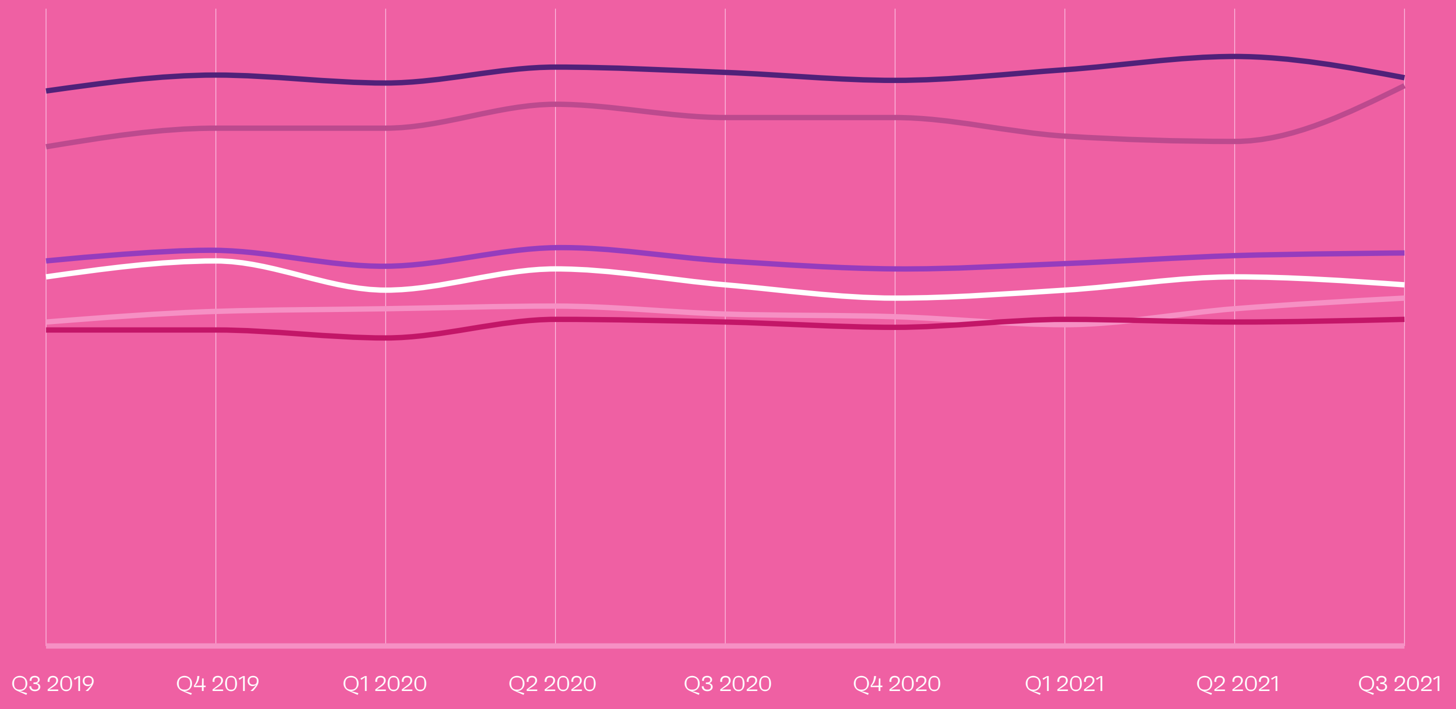
We discuss the attention economy in more detail within our Connecting the dots ***report***.

Average time in h:mm that each region's online consumers spend using social media on a typical day

1

Latin America · Middle East & Africa · Globally · Asia Pacific · North America · Europe

3:29	3:35	3:32	3:38	3:36	3:33	3:37	3:42	3:34
3:08	3:15	3:15	3:24	3:19	3:19	3:12	3:10	3:31
2:25	2:29	2:23	2:30	2:25	2:22	2:24	2:27	2:28
2:19	2:25	2:14	2:22	2:16	2:11	2:14	2:19	2:16
2:02	2:06	2:07	2:08	2:05	2:04	2:01	2:07	2:11
1:59	1:59	1:56	2:03	2:02	2:00	2:03	2:02	2:03



GWI Core Q3 2019-Q3 2021 · 1,606,432 internet users aged 16-64

Daily time spent on social media

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

Country	2017	2018	2019	2020	2021
Globally	2:16	2:20	2:26	2:25	2:26
Argentina	3:13	3:18	3:20	3:23	3:25
Australia	1:40	1:35	1:46	1:48	1:56
Austria	1:16	1:16	1:19	1:22	1:27
Belgium	1:32	1:32	1:35	1:41	1:40
Brazil	3:40	3:39	3:40	3:41	3:46
Canada	1:48	1:48	1:51	1:46	1:53
China	1:59	2:01	2:13	2:01	1:58
Colombia	–	3:34	3:46	3:41	3:41
Denmark	–	1:36	1:36	1:39	1:48
Egypt	3:07	3:05	3:02	2:52	2:57
France	1:25	1:23	1:37	1:41	1:46
Germany	1:13	1:08	1:19	1:24	1:29

Country	2017	2018	2019	2020	2021
Ghana	2:59	3:10	3:07	3:22	3:20
Greece	–	–	–	1:51	1:55
Hong Kong	2:01	1:53	1:55	1:55	1:58
India	2:25	2:29	2:29	2:30	2:33
Indonesia	3:27	3:23	3:19	3:19	3:20
Ireland	1:46	1:56	1:53	1:52	1:55
Israel	–	–	1:59	2:02	2:02
Italy	1:53	1:49	1:51	1:50	1:49
Japan	0:46	0:40	0:44	0:49	0:50
Kenya	2:51	2:59	3:17	3:33	3:08
Malaysia	3:07	3:04	2:56	3:03	3:02
Mexico	3:11	3:15	3:22	3:25	3:25
Morocco	2:23	2:34	2:31	2:34	2:31

Country	2017	2018	2019	2020	2021
Netherlands	1:25	1:17	1:20	1:22	1:25
New Zealand	1:50	1:43	1:47	1:51	2:00
Nigeria	3:04	3:26	3:31	3:46	3:42
Philippines	4:01	4:09	4:01	4:05	4:08
Poland	1:42	1:45	1:55	1:56	1:54
Portugal	2:13	2:13	2:11	2:19	2:29
Romania	–	2:34	2:20	2:19	2:18
Russia	2:20	2:22	2:29	2:22	2:24
Saudi Arabia	2:38	2:52	3:08	3:11	3:16
Singapore	2:08	2:11	2:13	2:17	2:24
South Africa	2:47	2:59	3:15	3:32	3:37
South Korea	1:11	1:12	1:13	1:12	1:13
Spain	1:38	1:42	1:49	1:53	1:53

Country	2017	2018	2019	2020	2021
Sweden	1:54	1:50	1:49	1:50	2:01
Switzerland	1:19	1:20	1:19	1:22	1:28
Taiwan	2:06	1:53	1:53	1:53	2:08
Thailand	3:07	3:14	2:58	2:48	2:55
Turkey	2:49	2:53	2:56	3:01	3:03
UAE	2:56	3:01	3:04	3:07	3:12
UK	1:54	1:52	1:47	1:47	1:47
U.S.	2:03	2:05	2:01	2:08	2:08
Vietnam	2:36	2:33	2:24	2:22	2:29

GWI Core Q1 2017-Q3 2021
2,730,111 internet users aged 16-64

Bringing more wellness to social networks

While some consumers are looking to spend less time on social media, there are things brands can do to add value and ensure their content lands with younger audiences.

Gen Z is trying to adopt healthier social media habits, not just by changing how long they spend on platforms, but also how they use them. In America, this group stands out for saying social platforms are good for society and help them feel connected to others; but also for believing there's too much pressure to be perfect in this space, and that it causes them anxiety.

Averaging around three hours of social media usage a day, 16-24s see these networks as an essential part of everyday life. Rather than turning their backs on them, they're rewriting the narrative.

Compared to 2020, more Gen Z social media users in the U.S. say posting about their life is a top reason for using networks. This can be linked to the casual posting trend and the rise of new layouts like the "**photo-dump**" in the West. Now this less polished, messy aesthetic has caught on, over 3 in 10 feel more confident sharing photos of themselves. And it's a good thing too; **research** shows that when we're active on social media, we have a more positive experience than when we're passive.

This means campaigns like Lay's **#DoUsAFlavor** or **#PostYourPill**, which push people to get involved and personal, are good models to follow. They show brands care and want to hear about what their customers have to say, even if it means relaxing their production standards. If younger consumers are putting more raw, socially-aware material out into the world, brands need to match and encourage it.

Demand for feeds that mirror real life

% of social media users in 7 countries who agree with the following

%	Gen Z	Millennials	Gen X	Baby boomers
I care less about impressing others on social media than I used to	39	34	26	22
I am more open about how I'm feeling online	32	32	21	13
I'm more confident posting photos of myself online/on social media than I used to be	31	31	19	10

Gen Z is the most concerned about time spent on social media

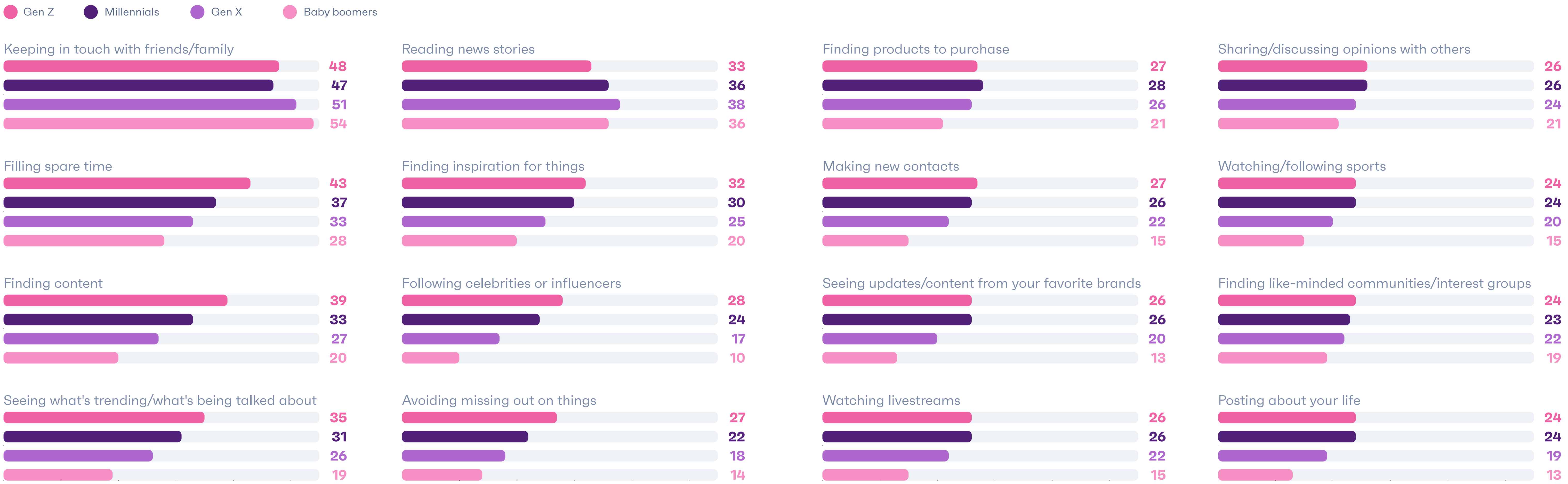
% of global internet users in each generation who agree with the following

GWI Zeitgeist September 2021 & GWI Core Q3 2021

9,223 social media users in Brazil, France, Germany, India, Italy, UK, USA aged 16-64; 204,493 internet users aged 16-64

Connecting is still at the heart of social media

% of social media users in each generation who say the following are the main reasons they use social media



GWI Core Q3 2021 199,419 social media users aged 16-64

A trip down memory lane

Nostalgia marketing is another great way to capture user attention. While it isn't anything new, **strategies** have picked up and matured in recent years. Fortunately for emerging businesses, "the past" doesn't have to mean decades ago. The pandemic shrunk our nostalgia loop, with the "good old days" potentially referring to any moment over the past few years. And platforms have become a prime place to express 2019-21 nostalgia.

Young consumers are especially gripped by these vibes on social media. If we look at an audience of Snapchatters, we can see Gen Z and millennials make up the majority of those who use its Memories feature; plus, those who engage with it are 43% more likely than average to say they prefer thinking about the past, rather than the future. Without getting into the debate of whether this is constructive, it's clear people are comforted by nostalgia and that it carries a lot of influence, which is why new annual events like **Instagram Playback** keep cropping up.

To trigger this emotion, brands can take part in throwback events or ask fans to share relevant memories. As long as they seem natural, many will appreciate these blasts from the past.

02

The top performing platforms

Gen Z social media is coming of age

Despite growing competition, Facebook isn't going anywhere. It tops our global leadership board and most younger consumers use it each month. Especially with so many websites using Facebook Login to speed up the sign-in process, it's well-embedded in people's online experience.

That being said, Gen Z has a special place for Instagram. In every quarter since Q2 2019, more 16-24s have visited Instagram than Facebook. A quick glance back at their social media motivations helps explain this: for all other generations, finding news is one of their top three reasons for using social networks; whereas Gen Z places more priority on finding content and seeing what's trending.

Baby boomers have an average of 4.6 social media accounts

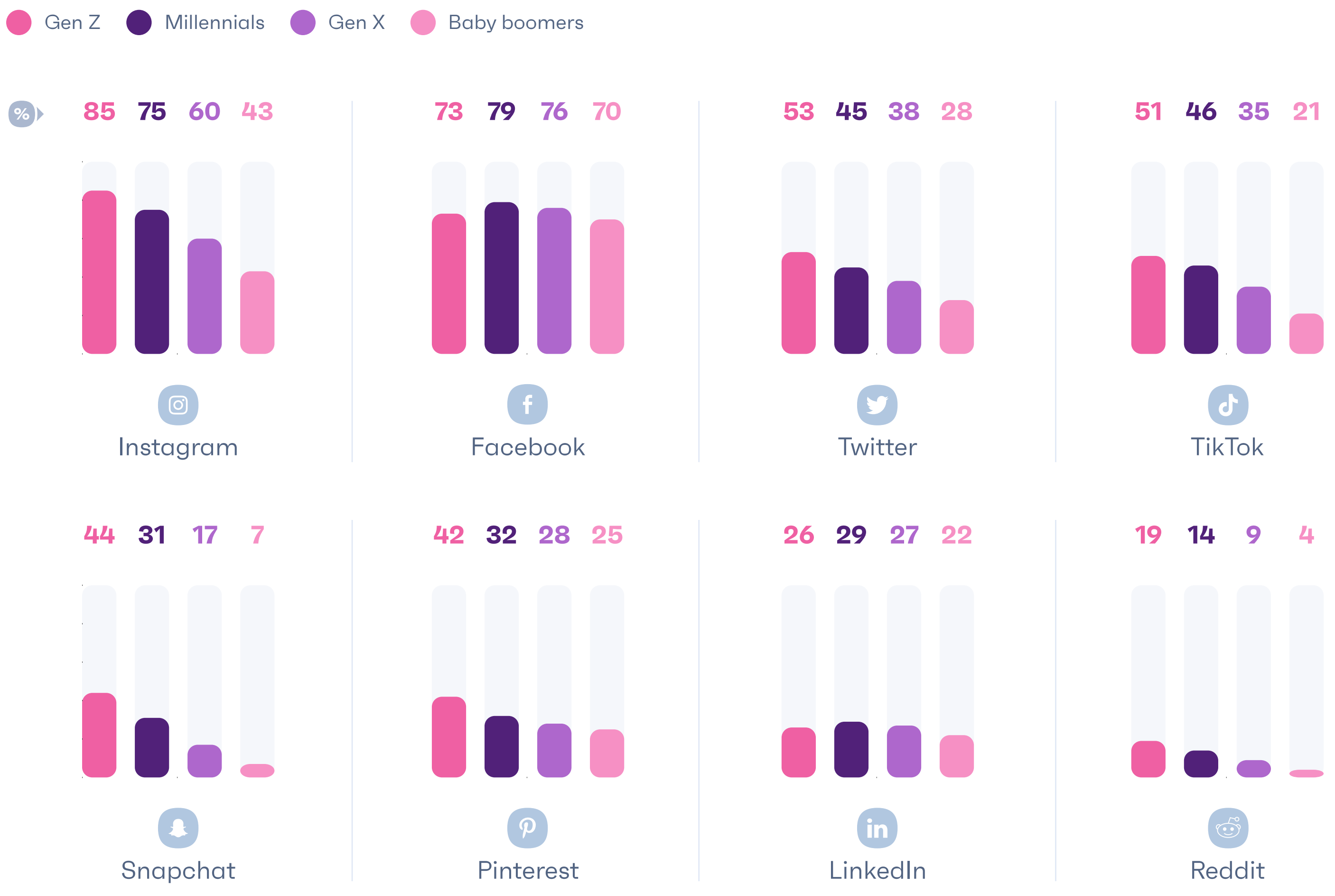
Gen Z always gets a lot of attention for challenging the status quo, but older groups are the ones who've made the clearest changes to their platform portfolio in the last few quarters. Since 2020, the number of consumers using TikTok monthly outside China has grown by 32%, with the biggest increases coming from Gen X and baby boomers. The app's growth doesn't show any signs of slowing and older consumers have a hand in this trend.

Since the end of 2020, slightly more 57-64s log onto social platforms to follow influencers, avoid missing out on things, and connect with good causes. And apps like TikTok are great spaces for them to see fresh content and get bursts of inspiration. Many older adults see themselves as creative (43%), adventurous (28%), and ambitious (26%), especially the TikTokers and Pinners among them. Brands marketing on these sites need to ensure they're showing older consumers in this light and that their content empowers them to live their best life.

5

Instagram tops Gen Z's charts

% of internet users outside China who use the following social media services monthly



GWI Core Q3 2021 | 179,510 internet users outside China aged 16-64

Top changes in the messaging space

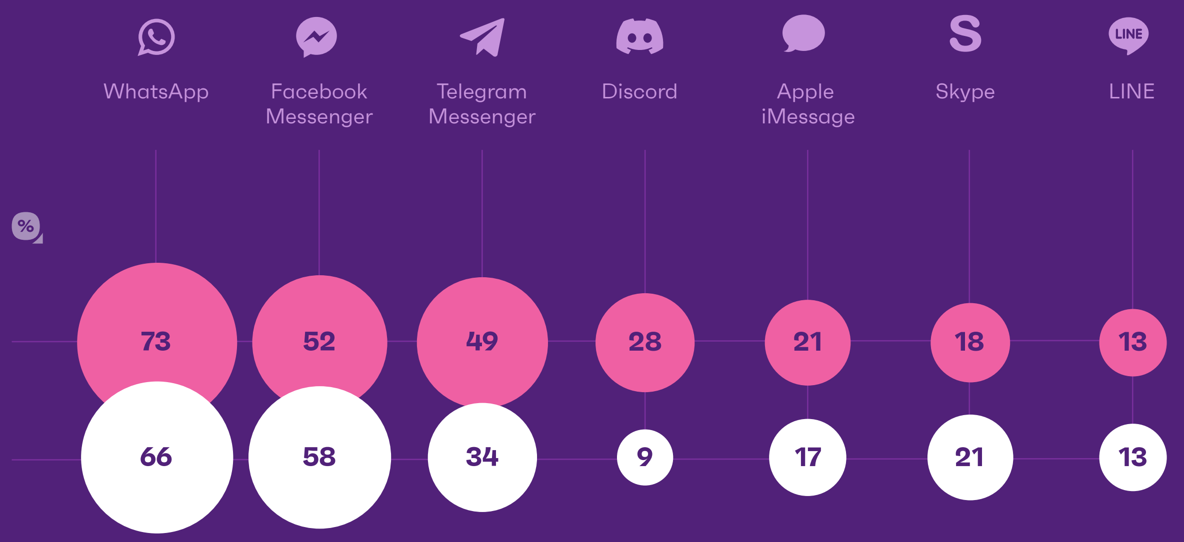
WhatsApp and Facebook Messenger are the most popular global messaging services. While Facebook Messenger leads in North America, WhatsApp comes out on top overall, and it's strengthened its lead over the past few quarters. Engagement with WhatsApp has almost reached a saturation point among consumers in Latin America (95%), with its figures even surpassing WeChat's penetration in China. But few people only use one messaging service and new players with unique selling points are making a name for themselves.

Gen Z's most distinctive messaging apps are also the ones that have seen the most growth lately, with Telegram and Discord both upping their overall usage figures by 19% since 2020. More importantly, while more people use WhatsApp and Facebook Messenger, Discord and Telegram users are more likely to interact with brands in these spaces. They might not seem like natural marketing channels, but there's a clear and growing business case for experimenting with these apps, and brands like AllSaints and Jack in the Box have already hosted events in their **Discord servers**.

Gen Z stands out for wanting companies to run communities, which explains their love of Discord. On the other hand, millennials are generally more tech-driven, with over a quarter wanting brands to offer personalized products and transparency around data collection. This makes Telegram, which puts privacy and customization at the heart of its organization, more attractive in their eyes. The app recently announced a new advertising tool that lets users see **sponsored messages** in public channels; these will be related to the topic of the group they appear in, allowing brands to reach this generation while respecting their privacy.

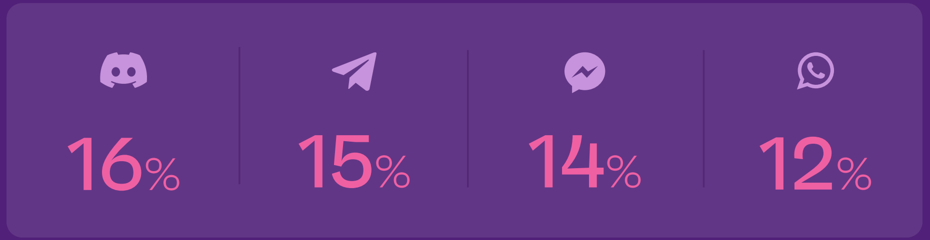
New messaging apps have disrupted this space

% of internet users outside China who use the following messaging services monthly



The potential for brand interactions on messaging services

% of social media users in each group who have interacted with a brand on a messaging app in the last month



GWI Core Q3 2021 · 204,493 internet users aged 16-64, and 179,510 outside China

Making sense of platform overlaps and differences

Well-known companies often rush to make early investments in up-and-coming platforms like Telegram. These sites are a great way to reach more niche and engaged audiences, and take part in emerging subcultures. That being said, smaller businesses with less capacity or smaller budgets don't need to feel anxious about maintaining a limited social media presence.

New sites do have a unique set of usage motivations, but these aren't exclusive to any one platform. For example, there's considerable overlap when it comes to citing product research as a use case: 54% of Pinners who say they use the site to find brand-related information also visit Instagram for the same reason.

Some SMBs are better off managing a few platforms well, rather than trying to be everywhere at once and neglecting additional accounts. This means taking the time to ensure shopping experiences feel at home on specific apps, as each has its own communication style. Looking at what each audience wants from brands is a good place to start: while Facebook's visitors stand out for favoring brands that are smart, consumers on Reddit over-index most for wanting them to be bold.

The top 3 reasons consumers give for using each platform

Based on the % of each platform's monthly visitors who use the service for the following

Facebook/Facebook Messenger

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

Smart

Pinterest

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

Trendy/cool

Linkedin

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

Exclusive

Reddit

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

Bold

Snapchat

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

Trendy/cool

TikTok

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

Young

Instagram

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

Trendy/cool

Twitter

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

Trendy/cool

The vibe: based on what each platform's users want brands to be (top over-index)

GWI Core Q3 2021 199,419 social media users aged 16-64

03

The main differences between markets

What's going on in China

The Chinese market is a potential goldmine for international businesses looking to expand. But the nation's social media landscape, with its own set of homegrown platforms, can seem intimidating at first. So, we've highlighted some key insights to help companies make sense of this space.

The Chinese online experience centers around mobile and consumers here are used to "super apps" that cover a lot of bases. Many sites have their own payment systems and buying often takes place within the app. WeChat is a perfect example: 76% of visitors use WeChat Pay monthly, rising to 85% among those who use its Mini Programs feature. Various competitors are hoping to share WeChat's spotlight, with **Douyin** launching a new Groupon-like tool back in March.

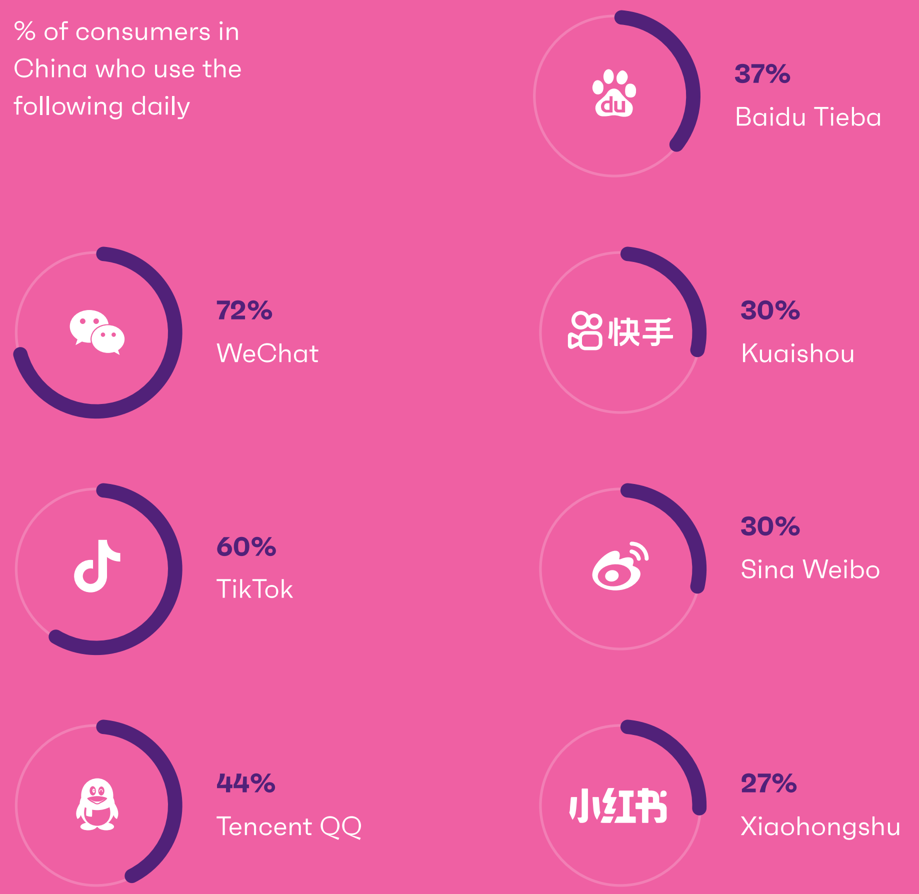
The Chinese social scene is very dynamic. WeChat's topped China's list since we started tracking it in 2015, but the gap between it and its competitors is closing. Since 2020, the difference in the number of people naming WeChat or Douyin as their favorite platform has lessened by 9 percentage points, with daily usage figures also narrowing within this timeframe. We're likely to see some big shifts in 2022, especially now that a range of new **antitrust rules** have been introduced.

There's room for more than one super app to dominate among different demographics. Baby boomers and rural consumers are the top users of WeChat, while millennials and urbanites lead when it comes to apps like Douyin and Weibo. Taking the time to select the right channels is therefore crucial for brands hoping to tap into this market.

Audio is also important when thinking about customer service, as Chinese consumers are 34% more likely to interact with brands on messaging apps. Almost two-thirds of WeChatters send a voice message monthly, which shows how mainstream audio chat has become. This behavior seems to be making its way West, with Discord (which is known for its voice chat function) rising through the ranks, and both **Facebook** and **Twitter** adding new chatroom features. This trend is definitely one to watch as it could influence how global brands conduct business on social media.

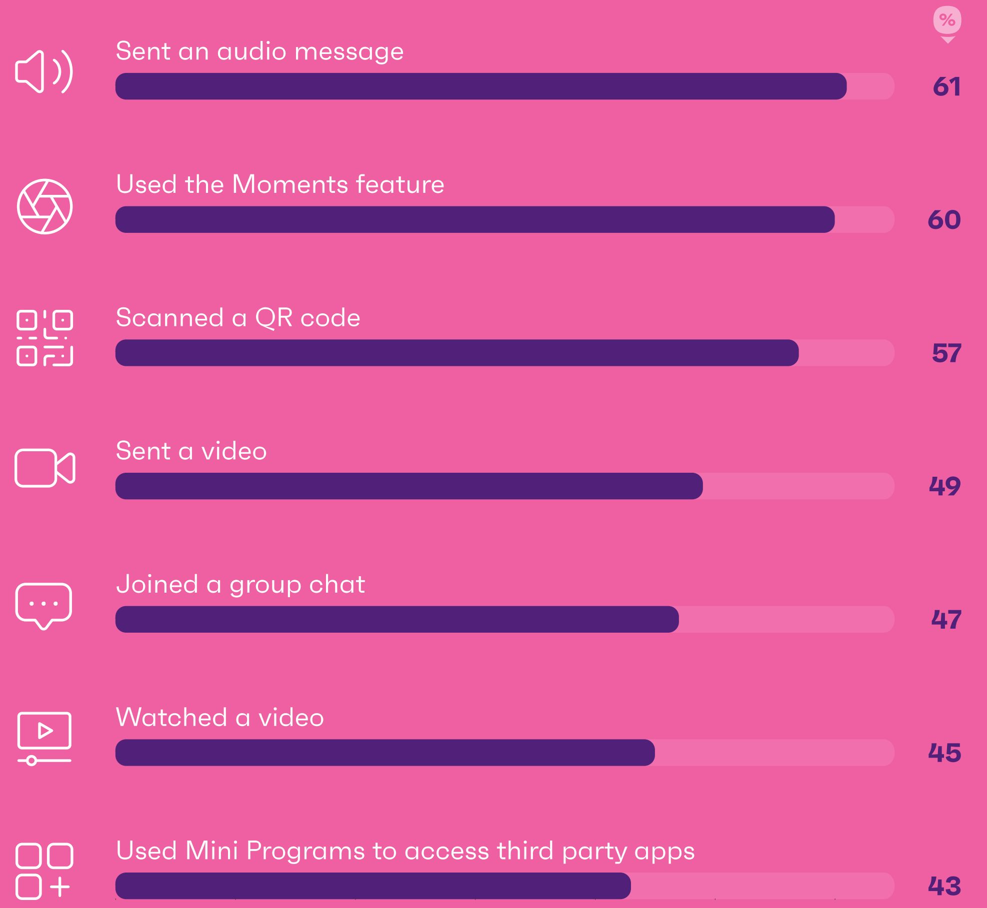
Most don't go a day without WeChat

% of consumers in China who use the following daily



The super app covers all creative and commercial bases

% of WeChat users who have done the following on the app in the last month



GWI Core Q3 2021 24,983 internet users in China aged 16-64; and 19,328 WeChat users

The behaviors moving West

Social media typically fulfils a wider brief in fast-growth markets like China than in the West. For example, consumers in Asia Pacific over-index most for using platforms to watch livestreams, and those in Latin America for finding things to buy; whereas in North America, the most distinctive reason for logging on is keeping in touch with friends and family.

However, our data suggests change is coming. Compared to 2020, people in this region are more likely to log onto platforms with commercial activities in mind. We've also seen increases among work decision-makers in **the West** using sites like YouTube, Instagram, and Facebook for product research.

It's going to take time, but efforts to integrate content and commerce in the West haven't been in vain. WhatsApp's shift toward in-app ecommerce is a nod in the right direction. Having introduced catalogs and shopping carts last year, the app lets users complete online **purchases** with one text message. Likewise, TikTok plans to follow in Douyin's footsteps by introducing online **food delivery** in America.

New **solutions** that blur the line between payment services and social media have also gained influence, with Cash App growing its U.S. engagement figures by 24% since Q1 2021. As attitudes soften, and as messaging and mobile payment services continue to mesh, the pace of social commerce is set to pick up in the West.

The changing face of social media in North America

9

% of social media users in North America who say the following are the main reasons they use networks (sorted by % change)

	%	% change since Q4 2020
Work-related networking/research	15	+13
Finding content	29	+12
Watching livestreams	19	+12
Finding products to purchase	19	+11
Finding inspiration for things	25	+10

GWI Core Q4 2020 & Q3 2021

27,954 (Q4 2020) and 28,422 (Q3 2021) social media users in North America aged 16-64

Each country's leading light

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

GWI Core Q3 2021 204,493 internet users aged 16-64

04

Keeping tabs on behavioral trends

Why short-form videos are on trend

Across every age group and country in our Zeitgeist study, short-form content is more popular than long-form. TikTok may have kickstarted a new era of bite-sized videos, but many social platforms now offer their own alternative. Reels have been around for some time, but they're picking up steam. In fact, there's been a 20% increase in the number of Instagram users engaging with this feature since 2020. Companies need to meet consumers where they are to make the most impact, which means upping their investments in this format is likely to pay off.

Short videos are quick to create and tend toward the less polished, more spontaneous content people are after. A good example is **Puma** challenging followers to recreate its logo more successfully, after dueting to a video of a **barista** trying to make a coffee with a puma on top. Consumers on these channels are far more likely to use social media for creative inspiration and favor brands that offer this, so editing tools like TikTok's Stitch or Instagram's Remix feature are good resources to draw on.

While short-form content is the preference, long videos have their place. Short clips are typically associated with Gen Z, but the gap between the two types is greatest in Western markets and among baby boomers. This is explained by younger consumers' appetite for how-to videos and vlogs. A large portion of Chanel buyers are 39 or under, and the brand's very successful **YouTube** channel caters to its audience well by offering a stream of make-up tutorials and product review videos. Different categories are also more powerful in certain countries; for example, German consumers are most likely to watch medium length videos about news or politics, whereas Indian viewers favor comedy.

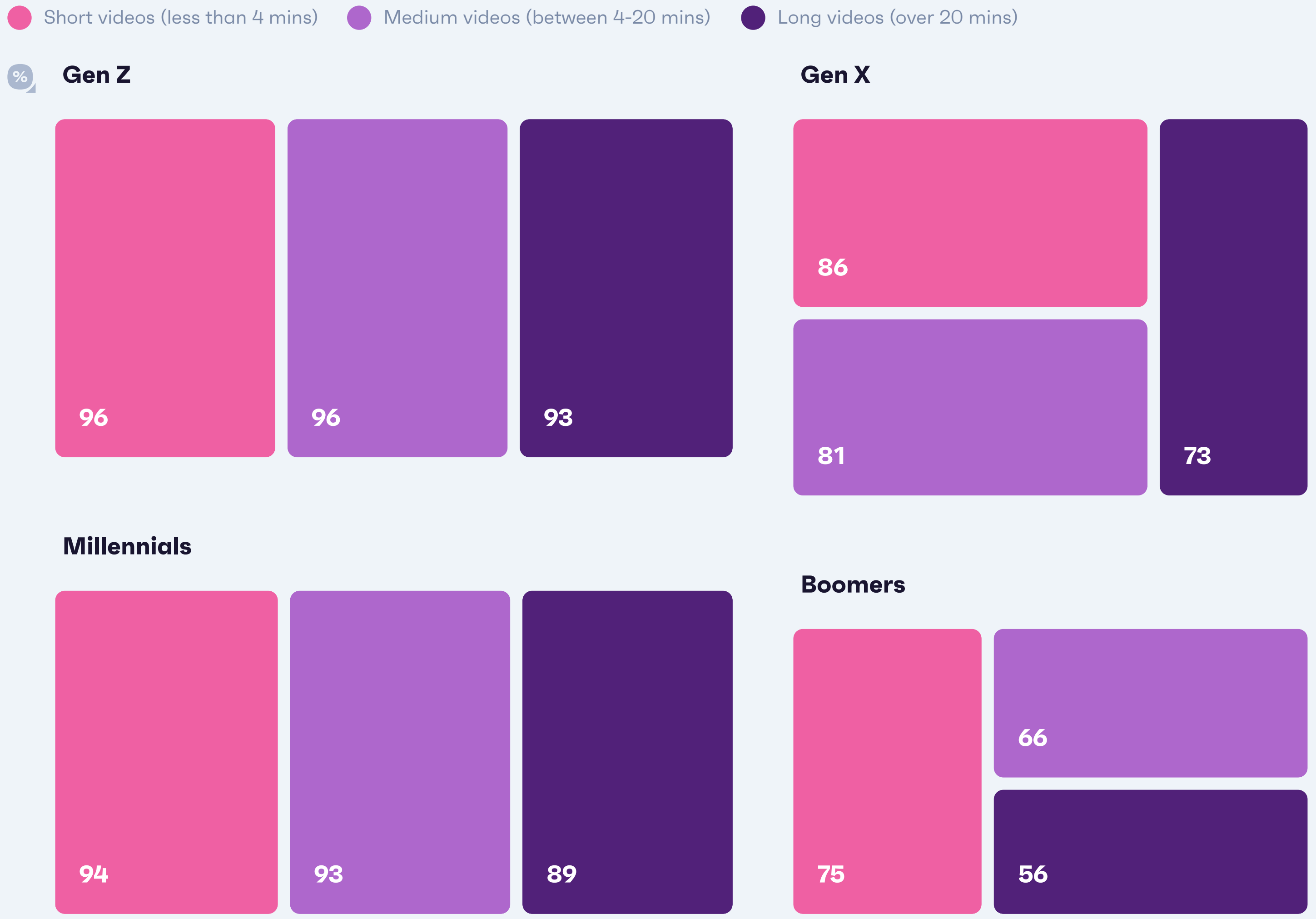
Short videos are the general preference, but longer ones are well-liked among younger consumers

1 in 4

consumers watch a video made by a brand each month

11

% of social media users in each age group who have watched the following in the last month



GWI Zeitgeist August 2021

9,382 social media users in Brazil, France, Germany, India, Italy, Japan, UK, USA aged 16-64

The power of a good story

Stories are very widespread. Outside China, 61% of social media users view or create a story on either Snapchat, Instagram, or Facebook monthly. This number has increased slightly since the end of 2020 and already surpassed three-quarters of all internet users in Latin America.

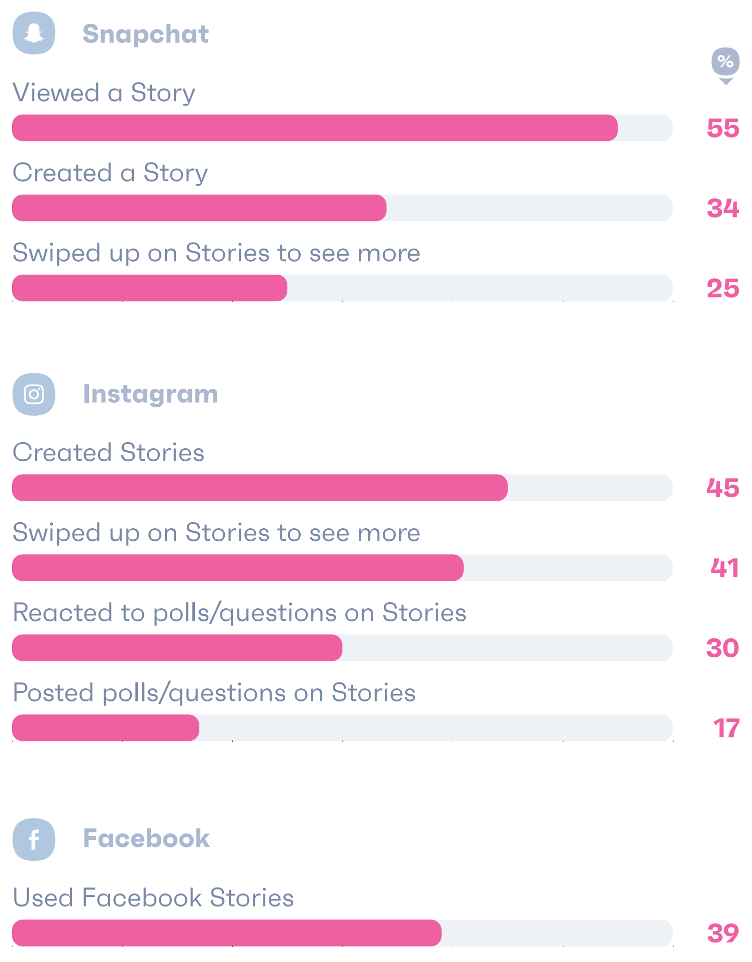
Attitudes toward posting have, and continue to, change. While some are posting more, many prefer their updates to be temporary or semi-private. Less than 1 in 10 in America post comments online that they'd never say in real life, which suggests that most think twice before posting publicly; and the number who prefer to share content with friends and family privately has increased by 9% since Q4 2020. This evolving mindset is prompting more to lean on stories.

Stories are also getting better at catering to engagers, who are far more likely to say they mainly use social networks to see what's trending and to share opinions. New additions like Instagram's "Add Yours" sticker are helping businesses answer these demands; this call to action has already been used to fire up response chains sharing **sports match** viewing locations or **outfits of the day**, with extraordinary results. Given Instagrammers are the most likely to create Stories each month, the site and its growing catalog of tools are a boon to brands hoping to stir up UGC.

Instagrammers are the most active Story creators

12

% of each platform's users who do the following each month



GWI Core Q3 2021

123,714 Instagram users, 52,049 Snapchat users, and 147,189 Facebook/Facebook Messenger users aged 16-64

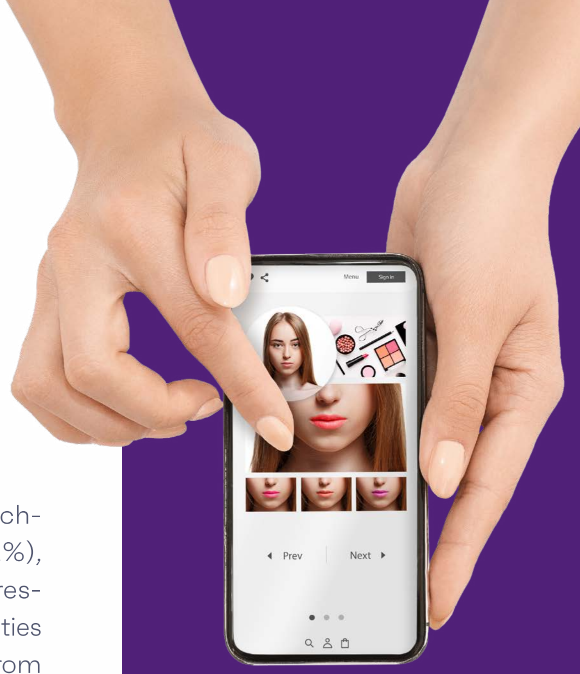
How to crack AR

Lockdowns and ongoing restrictions left a gap for augmented reality to fill, with around a third of social media users in the U.S. and UK saying AR is helpful for trying on products they wouldn't otherwise during the pandemic. L'Oréal and MAC already offer virtual product **testing** for cosmetics on Instagram, and the possibilities for fashion, tech, and lifestyle industries are **expanding**.

As well as working to convert buyers, ads that use AR tend to be more attention-grabbing, with examples from early adopters confirming its benefits. Pet care company **Purina** used AR in a brand awareness campaign that allowed viewers to interact with an animated cat; this achieved over 170 million paid impressions on Facebook and Snapchat. Plus, many describe businesses that use AR in advertising as technologically advanced (42%), innovative (41%), and progressive (28%) – which are all qualities that help separate brands from their competitors.

While AR can do a lot of good, this does depend on how companies use it. Since 2020, there's been a drop in filter usage in various parts of the world, with 1 in 5 social media users wanting to see pictures that don't use filters from the people or organizations they follow. It seems some consumers are impressed by companies using AR to enhance the shopping experience, but feel let down when it's used to augment promotional content.

We discuss filter usage in more detail within our Connecting the dots ***report****.*



Thanks to social media, AR is familiar ground

This technology turns scrollers into buyers

% of each platform's global users who have done the following on the app in the last month

Snapchat

Used filters/geofilters	39
Used Lenses	30

Instagram

Used filters	28

TikTok

Used an effect	24

% of each platform's users in the U.S./UK who agree with the following...

TikTok · Snapchat · Instagram

56 | 49 | 43

AR makes the shopping experience easier

42 | 37 | 31

I pay more attention to advertising that incorporates augmented reality

GWI Core Q3 2021 & GWI Custom November 2021

123,714 Instagram users, 52,049 Snapchat users, and 90,038 TikTok users aged 16-64; 1,105 Instagram users, 422 Snapchat users, and 432 TikTok users in the U.S./UK

How news is consumed on social

Interest in the news has generally dropped over the past few quarters. Consumers that have switched off news cite too much negativity and COVID-19 content as their main reasons for doing so. Twitter's end-of-year analysis supports this change in preference. In **2020**, its most used hashtag was #COVID19, which was dethroned by #BTS (often used to rally against Asian hate crimes) in **2021** – a sign many are now more receptive to other issues.

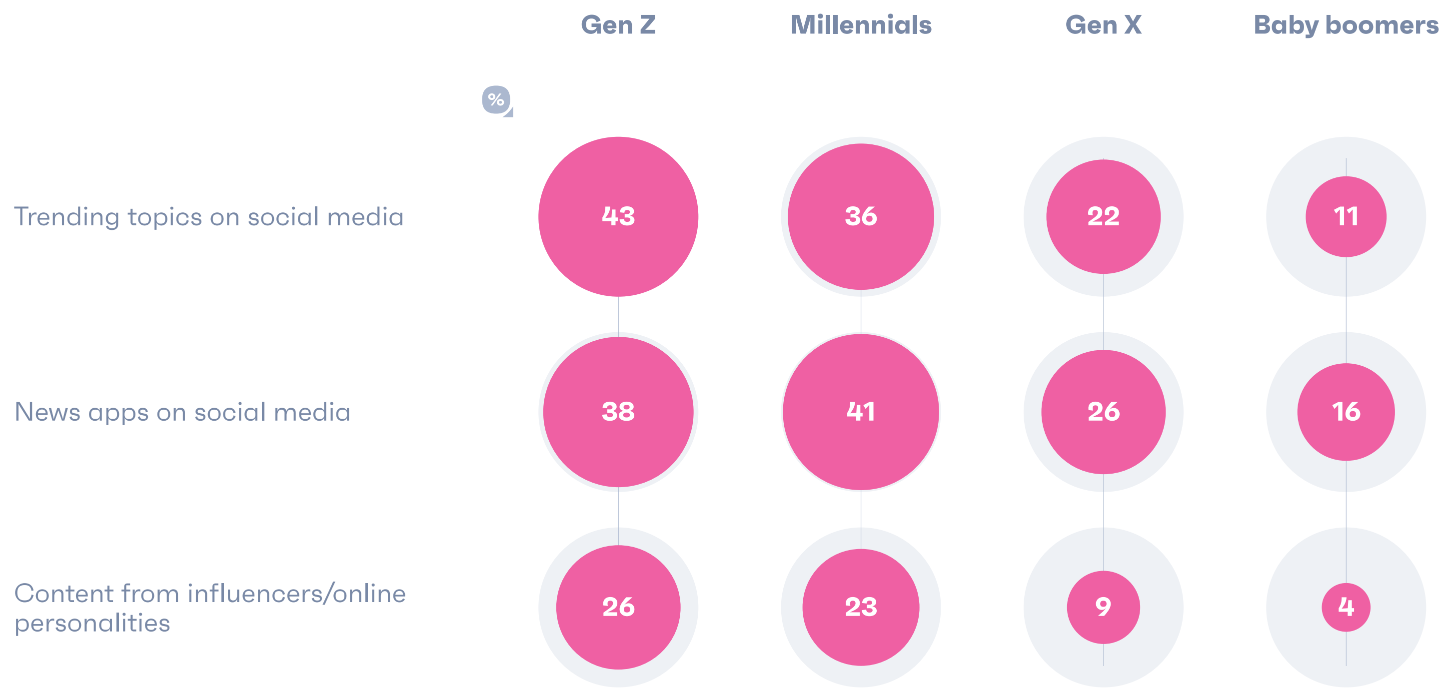
This is where social channels have an advantage over TV. News apps and trending topics allow a network's audience to collectively decide on what's in the spotlight and for coverage to be customized. This helps explain the 13% rise in the number of consumers reading or watching the news on social media since the start of 2020.

People have a habit of associating traditional social sites with older groups, but Twitter's most popular among Gen Z. The app's Topics feature is a major selling point for this generation, who are 36% more likely to want news coverage to be tailored to their interests. The fact that a large number get their updates from influencers also suggests they want perspectives that aren't in mainstream media.

To ensure they're resonating with younger groups, brands and media companies can lean on trending topics. 64% of consumers who use Twitter Communities and Topics in the U.S./UK would like their favorite brands to be more engaged in this space. As well as taking part, companies can use these tools to stay on top of what issues are important within their industry, find engaging things to share on social media, and get ideas for their own content.

Many younger consumers want fresh perspectives

% of social media users in each generation who typically consume news content in the following ways



GWI Zeitgeist September 2021 9,223 social media users in 7 markets

Other spaces are becoming more social

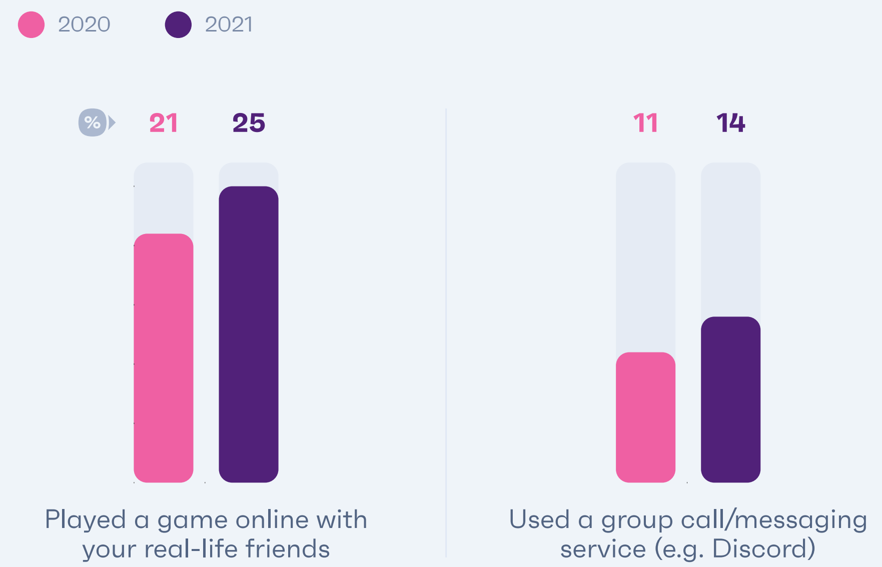
Today, people socialize in a cocktail of different virtual spaces. 3 in 10 smartphone gamers play online with their real-life friends monthly, and even more streamers say they listen to music to be able to share with friends and family. The last five years have seen many music and gaming services lean more on the social side of things – whether that's in the form of livestream events on Fortnite or campaigns like **Spotify Wrapped**, which encourages music fans to share their most-played songs and artists. The online dating industry followed suit. Video chat was introduced early on in the pandemic, with apps like Hinge later adopting **audio**.

These social layouts are having an impact. Since Q2 2020, there's been an 11% increase in the number of Americans saying they feel more connected to people online than in real life. Given the rising demand for social features on these platforms, they stand to have a positive impact on engagement levels.

More importantly, as other sectors become more social, they bring new opportunities for non-endemic brands to meet consumers in these spaces or stay relevant by participating in discussions around them. **Gucci** has hosted fashion exhibitions on Roblox, allowing avatars to try on virtual outfits and make purchases. And among others, Netflix's social accounts made **references** to the Wrapped campaign, aligning it with popular trends while promoting its original content soundtracks. With the overlap growing, good things will come to brands that get creative.

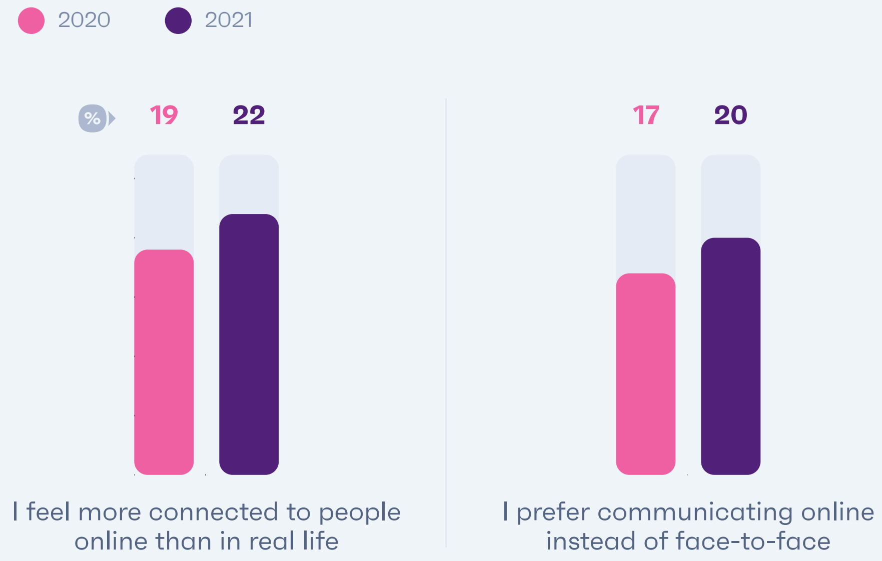
Efforts to make gaming more social are paying off

% of gamers in the U.S. who have done the following in the last month



Some daters have developed a preference for online interactions

% of online daters in the U.S. who agree with the following



Many streamers have social motivations for listening to music

% of global music streamers who listen to music for the following reasons

To express my individuality — **42%**

To be able to share with friends and family — **41%**

GWI USA Q2 2020-Q3 2021; GWI Core Q3 2021

8,923 online daters and 46,884 gamers in America aged 16+; 37,147 music streamers aged 16-64

Marketing in the metaverse

First coined in a 1992 novel, the term "metaverse" is thought by some – Mark Zuckerberg included – to represent the future of social media, if not the whole internet. But for all the buzz around it, what do consumers actually think?

Most internet users (70%) have heard of the term, though the majority of those (53%) don't actually know what it means. 51% would be interested in participating, though this drops with age. It's too early to say if the metaverse is the next big thing, but there are useful insights we can share with brands looking for a first-mover advantage.

While the metaverse is often imagined as a gaming space first and foremost, its impact on content creation shouldn't be overlooked. The most popular reason for wanting to take part in the metaverse is based on the idea that it will make online gaming more popular (43%), but hopes that it'll make content creation easier or more prominent is also a powerful incentive (41%). As the gaming industry's tie to the creator economy continues to **strengthen**, companies looking for some cultural clout could consider partnering up with influencers in these virtual spaces.

> "It is really the creators and developers who are going to build the metaverse and make this real
>
> **MARK ZUCKERBERG**

05

Speaking of social commerce

How research leads to discovery

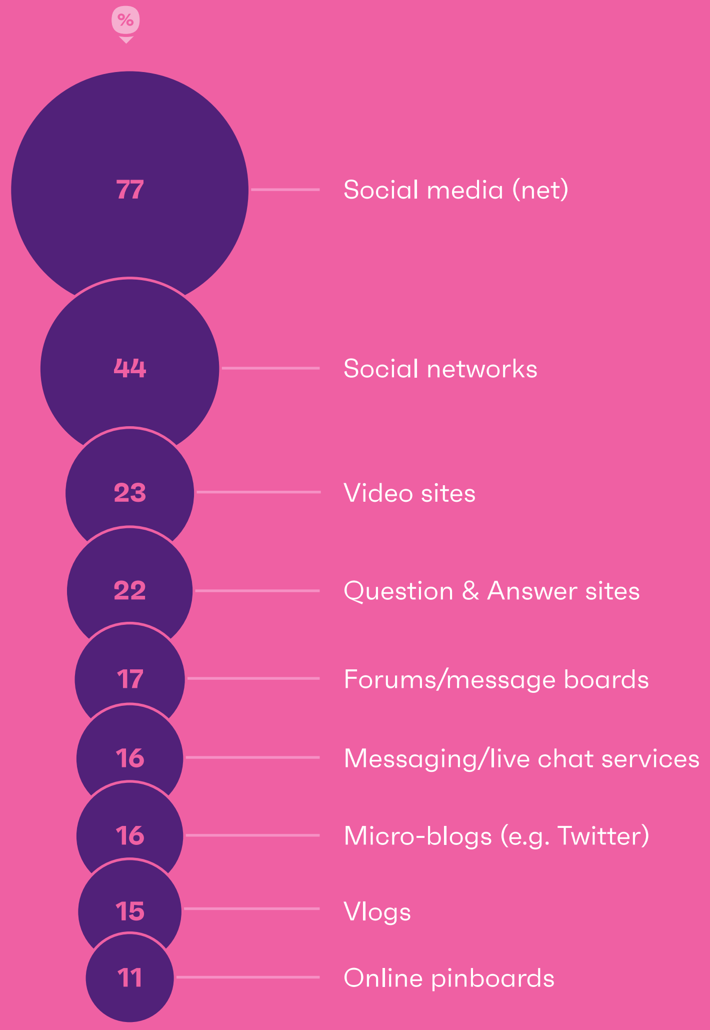
Overall, search engines (32%), ads seen on TV (31%), and word-of-mouth recommendations (28%) top our brand discovery chart. But social media comes in all shapes and sizes, with sources like Q&A sites also falling under its umbrella. ROI agency Zenith predicts that 2022 is the year that'll see social media's **ad market** overtake TV, which seems reasonable given how big this channel's combined impact is.

Even if we look at the habit of researching products on social networks alone, we can see they're slowly gaining on search engines. The space between the two, which was 7 percentage points in 2020, now rests at 4. Plus, Gen Z passed an important milestone in Q3 2020; social networks are now the most common way they find out about brands or products. For them, the gap has already been filled and then some. Traditional formats are still important and this is unlikely to change anytime soon, but social networks are taking up more room at the discovery table.

There's a couple of things brands should bear in mind when looking to take their social media investments up a level. Consumers are more open to commercial propositions on channels like Instagram; while brand discoveries occur on all sites, marketing on platforms like Reddit or Snapchat might benefit from being more content-driven and less overt. Industry is also important when considering niche networks. International vacation buyers are 56% more likely to discover brands via forums or messaging boards, but it might not be the best fit for beauty companies, whose buyers lean more toward visual media and influencer recommendations.

Some research essentials

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



How brand discovery happens

16

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

GWI Core Q3 2021 204,493 internet users aged 16-64

With great power comes great responsibility

Lockdowns had a huge effect on how we all see and engage with social media, which hasn't always been good news for influencers. A number of famous personalities received **backlash** for seeming unrelatable or insensitive during difficult times, causing some to predict "the death of the influencer".

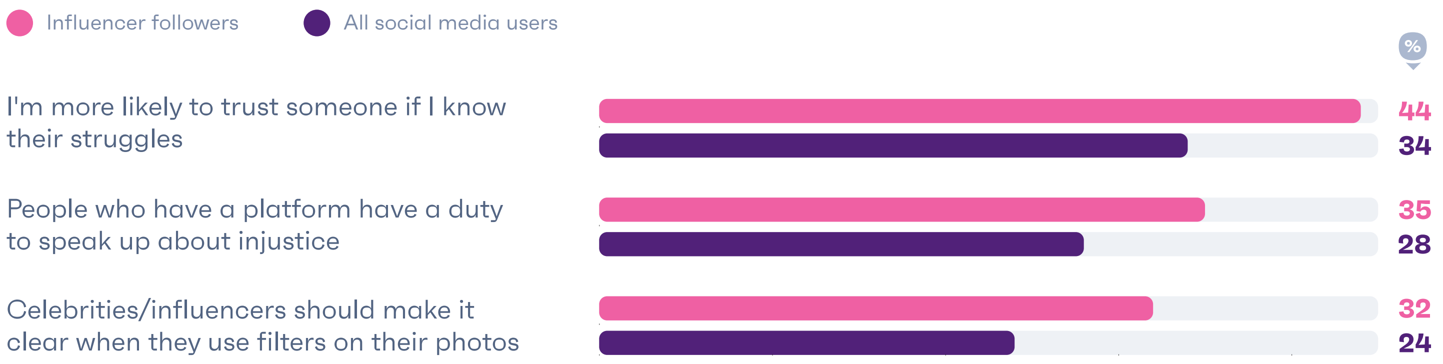
But this idea has a few holes. For starters, more social media users have started following influencer accounts since 2020, with beauty experts making the most headway. Sports stars also appear to be gaining influence; we've seen big names like Simone Biles and Marcus Rashford emerging as spokespeople for progressive issues, and our GWI Sports **research** shows that people are more likely to follow individual athletes than teams.

There's a reason why these woke figures have received so much **positivity** on social media, and it links back to what people want from influencers. The practice may be going strong, but the culture has shifted. To many consumers, those who have a platform should be speaking up about injustice and helping to curb unrealistic beauty standards by ensuring the pictures they put out there are "natural".

A growing number of brands work in long-term partnerships with influencers, rather than on one off-projects, which means they're associated more closely with the content their ambassadors create. Socially-aware, untouched work promises to give both parties the home advantage in a space where people are more likely to trust those who own their imperfections.

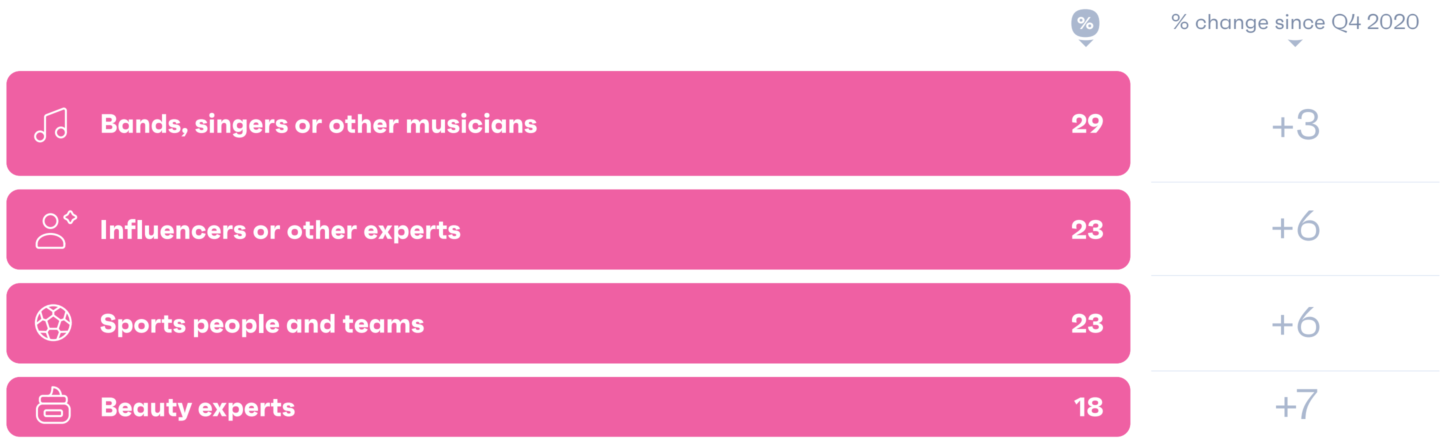
Reality sells...

% of social media users in each group who say...



...and people are buying

% of global social media users who subscribe to the following social media accounts



GWI Zeitgeist September 2021; GWI Core Q4 2020 & Q3 2021

9,223 social media users in 7 markets; 199,419 social media users aged 16-64

The next phase of livestream shopping

China is a pioneer for livestream shopping and often looked to as a shining example in other markets. 47% of online shoppers here watch a livestream weekly, and billions were sold in goods by individual influencers during **Single's Day 2021**.

Livestreaming definitely isn't a market exclusive trend, though. Consumers in four countries have surpassed China for livestream engagement, with MEA countries like Morocco (+20%), UAE (+14%), and South Africa (+13%) making significant jumps since Q1 2021. Lockdowns might have given live videos more momentum, but they've managed to keep this going.

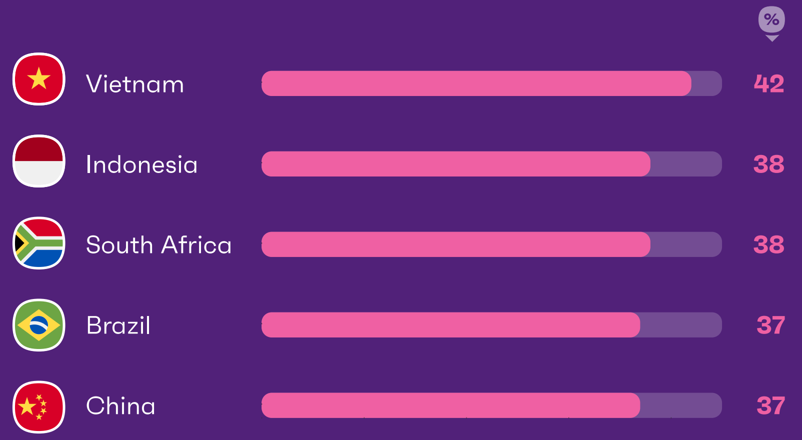
Livestreams should be on the radar of any brand looking to engage an attentive, and often impulsive, audience. Depending on their target customers and where they typically meet online, marketers wanting to go live have a range of platforms to choose from, especially now Twitter's joined the ranks. Whatever site they land on, they're raising the chances of social buying by investing in live video. Gaming and social livestreamers are far more likely than average to list a social media "buy" button as a top online purchase driver (20% vs 13%), and these figures are higher than for other consumer groups like IGTV/Reels users or Stories viewers.

2022 will likely see more high-end brands get involved. Luxury companies in China are used to going live, and those in other regions are starting to break the ice. Over 1 in 4 luxury buyers in the West watch a livestream weekly, which ensured a large audience for Burberry's live debut of its spring/summer 2021 collection on **Twitch**.

Where livestreams are most popular

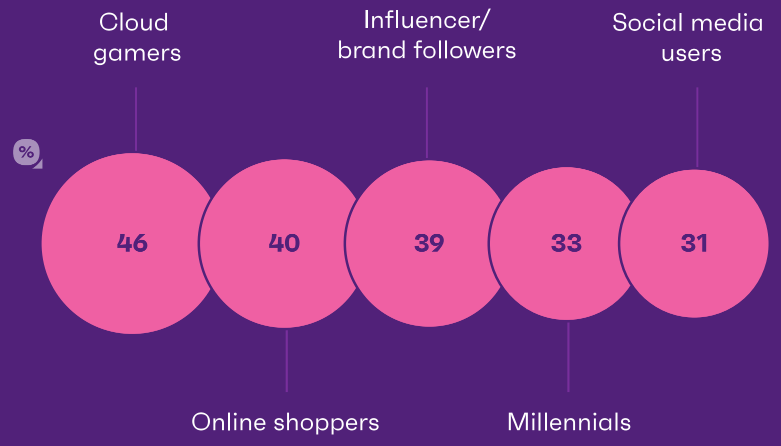
18

% of social media users in each country who have watched a livestream in the last week



Who's watching them?

% in each group who have watched a livestream in the last week



GWI Core Q3 2021

204,493 internet users and 199,419 social media users aged 16-64

Social commerce is leading the future of online shopping

Social shopping has taken flight, but it's landing differently around the world. Latin Americans lead when it comes to engaging with promoted content and making in-app purchases. At the other end of the spectrum, Europeans are the most likely to use ad-blockers, the least confident about handling their data online, and the most reluctant to checkout in social spaces.

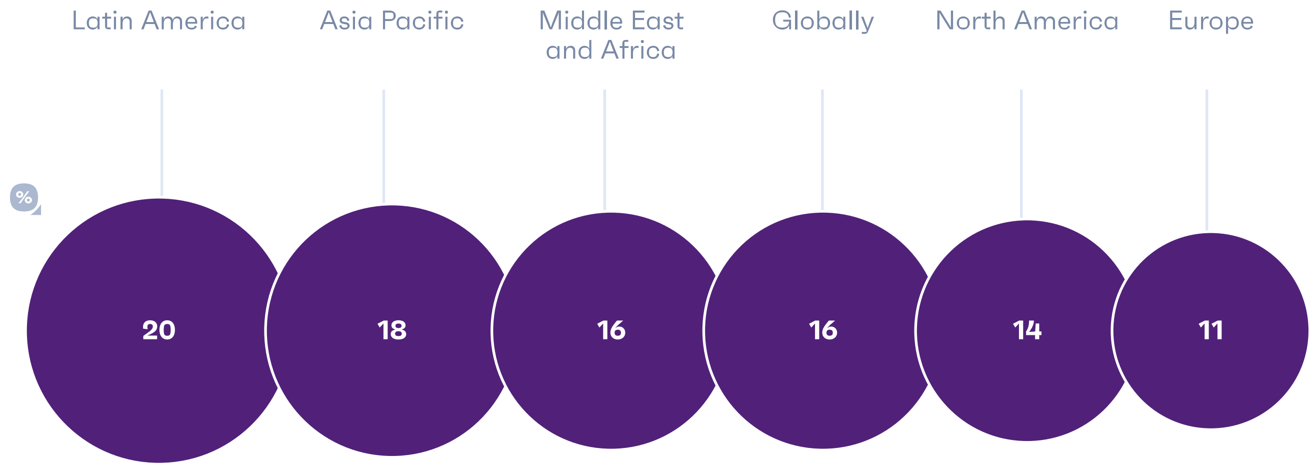
Raising awareness will help tone down their security concerns. Many data hesitant consumers cite reviews (33%) and positivity on social media (20%) as top purchase influencers. Brands could therefore benefit from sparking discussion about their shop using features like polls, encouraging social shoppers to share their purchases, and prompting creators to review their storefront – as visitors are more likely to give social shopping a go if the idea comes from someone they trust.

Despite some groups remaining unsure, globally, social commerce is expanding. The number engaging with Facebook Marketplace and Instagram Shopping Bag has climbed since 2020, and these channels are set to claim an increasingly **bigger** share of total ecommerce sales. Brands that understand what drives their target audience to make social purchases and use this data to shape their strategy are likely to be among tomorrow's winners.

It's worth remembering that each platform lends itself to social commerce differently. Across seven leading apps, Instagrammers interact most with paid social campaigns, while more Facebook users checkout on the platform. For now, the former is better at inspiring decisions, and the latter at closing the loop. Though, strategies will need tweaking over time as each site's functionalities evolve and players like TikTok carve out their own unique piece of the pie.

Engagement with paid social is highest in LatAm

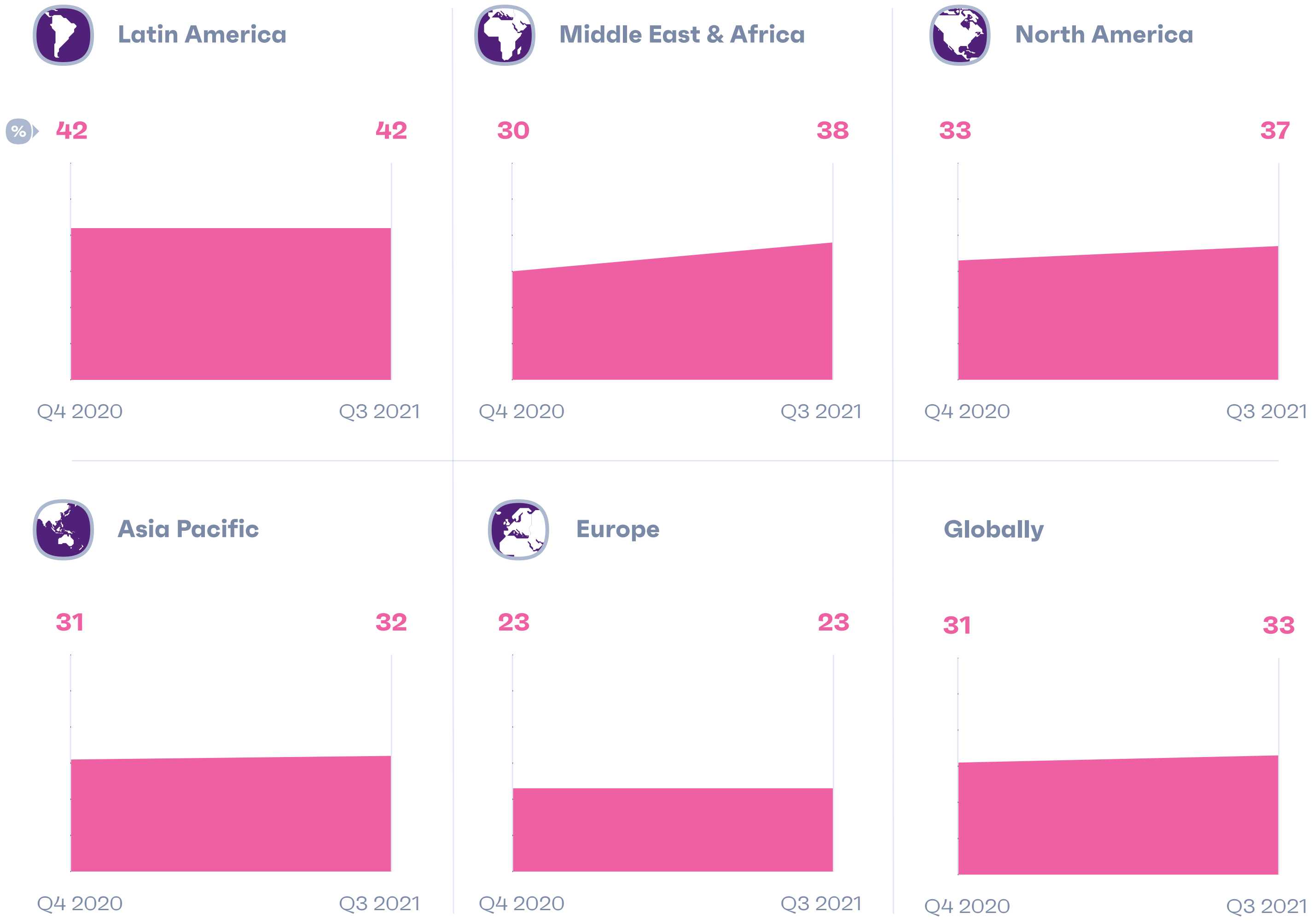
% of social media users in each region who have clicked on a promoted/sponsored post on a network in the last month



Social commerce is making steady progress

19

% of platform users in each region who have used Facebook Marketplace/Instagram Shopping Bag in the last month



GWI Core Q3 2021 199,419 social media users aged 16-64

Want more answers?

Need more answers? Our custom research gives you the power to ask whoever you want, whatever you want

Find out more

Appendix

1. On an average day, how long do you spend on social media?
2. On an average day, how long do you spend on social media?
3. Which of these statements do you agree with? • Which of the following do you feel describes you?
4. What are your main reasons for using social media?
5. How often do you visit or use these services? (At least monthly)
6. How often do you visit or use these services? (At least monthly) • Which of the following actions have you done online in the past month? (Interacted with a brand on a messaging app)
7. Which platforms/services do you use to do the following? • Which of these do you want brands to be?
8. How often do you visit or use these services? • What have you done on WeChat in the last month?
9. What are your main reasons for using social media?
10. Which of these social networks would you say is your favorite?
11. In the last month, I have watched a short online video (less than 4 minutes long) about... • In the last month, I have watched a medium-length online video (between 4 and 20 minutes long) about... • In the last month, I have watched a long online video (over 20 minutes long) about...
12. What have you done on Snapchat/Instagram/Facebook in the last month?
13. What have you done on Snapchat/TikTok/Instagram in the last month? • To what extent do you agree or disagree with the following statement?
14. How do you typically consume news content?
15. Which of these gaming-related actions have you done in the last month? • Which of these statements do you agree with? • Which of the following describe the reasons you listen to music?
16. Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? • How do you typically find out about new brands and products?
17. Which of these statements do you agree with? • Which social media accounts do you follow or subscribe to?
18. In the last week, which of these have you watched, listened to, or done online? (Watched a live video stream)
19. Which of the following actions have you done online in the past month? (Clicked on a promoted/sponsored post on a social network) • What have you done on Instagram/Facebook in the last month?

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.

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.

Mobile Survey Respondents

From Q1 2017 on, GWI has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, **click here**.

Internet Penetration Rates Across GWI's Markets

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of around 20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case in North America, much of Europe and places in APAC such as Japan and Australia.

Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. In some Middle Eastern, African and Asian countries (e.g. India, Indonesia), we would also expect a gender-based skew towards males. Generally, younger internet users are more active and engaged with a lot of the behaviors and services tracked by GWI, which means % scores will typically be higher in low-to-medium-penetration markets.

Internet Penetration Rates (GWI's Forecasts for 2021 based on ITU 2017 and 2018 data)

The table here refers to the total population in each market. The above internet penetration estimates are calculated using the most recent data from the International Telecommunication Union - a United Nations agency responsible for issues concerning communication technologies. The most recent published data from this source is from 2018 (and in some countries 2017), so GWI forecast the data forward to 2020 by making calculations based on the trend of internet growth in each country from 2000 onwards. This calculation is then adjusted based on other (usually national government) sources which can be used to provide an accurate overview of internet usage in each country. Note that the figures used to calculate GWI's own universe figures will be among 16-64s only, and will therefore be higher.

	%		%
Argentina	83	Morocco	74
Australia	91	Netherlands	96
Austria	91	New Zealand	94
Belgium	92	Nigeria	51
Brazil	77	Philippines	68
Canada	95	Poland	83
China	66	Portugal	79
Colombia	69	Romania	78
Denmark	98	Russia	89
Egypt	59	Saudi Arabia	93
France	87	Singapore	91
Germany	93	South Africa	64
Ghana	51	South Korea	98
Greece	80	Spain	93
Hong Kong	93	Sweden	96
India	47	Switzerland	96
Indonesia	49	Taiwan	91
Ireland	88	Thailand	63
Israel	90	Turkey	80
Italy	79	UAE	99
Japan	94	UK	97
Kenya	42	USA	92
Malaysia	86	Vietnam	73
Mexico	74		

Internet Penetration Rates: GWI Versus ITU Figures

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

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

SAMPLE SIZE BY MARKET

This report draws insights from GWI's Q3 2021 wave of research across 47 countries, with a global sample of 204,493 respondents.

Argentina	1,582	Morocco	1,064
Australia	4,382	Netherlands	1,313
Austria	1,300	New Zealand	1,312
Belgium	1,311	Nigeria	802
Brazil	5,785	Philippines	3,155
Canada	4,860	Poland	2,102
China	24,983	Portugal	1,279
Colombia	2,574	Romania	1,359
Denmark	1,557	Russia	4,334
Egypt	1,847	Saudi Arabia	1,568
France	10,725	Singapore	3,181
Germany	10,698	South Africa	1,583
Ghana	847	South Korea	1,975
Greece	1,299	Spain	10,535
Hong Kong	1,833	Sweden	2,625
India	13,743	Switzerland	1,564
Indonesia	5,251	Taiwan	2,339
Ireland	1,303	Thailand	3,860
Israel	1,551	Turkey	2,048
Italy	5,253	UAE	1,874
Japan	5,291	UK	10,428
Kenya	796	USA	24,692
Malaysia	3,834	Vietnam	2,557
Mexico	4,339		

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