TRENDS 16

THE NUMBERS THAT MATTERED IN 2015
THE TRENDS TO WATCH IN 2016

globalwebindex

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globalwebindex

INTRODUCTION

Over the last twelve months, GlobalWebIndex has inter-viewed over 200,000 real-life internet users across 34 mar-kets. Drawn from our panel of 10m+ online adults, we asked our representative samples about a wide range of digital be-haviors and attitudes – covering everything from the social networks and apps they've used to the products they've re-searched online, the privacy measures they've adopted and the devices they've used to access the internet.

With our questionnaire harmonized across all 34 coun-tries, we have a truly global perspective on how trends are evolving and which markets/demographics are driving the change. We're also able to add insight about the beliefs and motivations which underlie this. In short, we can tell you not just what people are doing, but *why*.

In this report, we've analyzed our 2015 research to uncover the stories that have shaped the year gone by as well as the trends to watch in the year to come.

For clients, all of the questions and data-points featured in this re-port are available to explore on PRO Platform. They can be inves-tigated across any audience, date range or selection of countries/ regions, with users able to build bespoke audiences based on our wide range of demographic, attitudinal and behavioral variables. To this end, each chart is accompanied by a hyperlink which will take you to the appropriate section on PRO Platform; simply click on the relevant link to start exploring the data further.
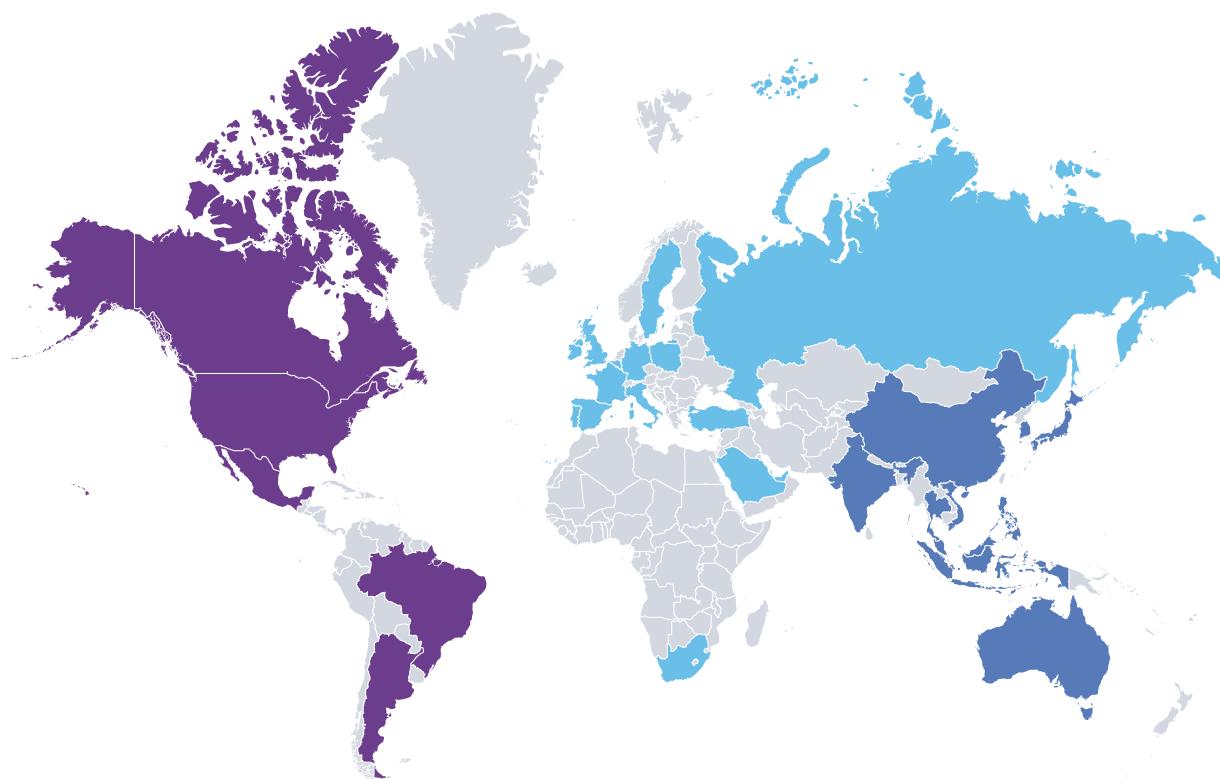
AMERICAS

- Argentina
- Brazil
- Canada
- Mexico
- USA

EMEA

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

APAC

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

We also have a wide range of off-the-shelf reports available to download, including:

Market and Region Reports

In-depth analysis of digital trends in a specific country or region.

Audience Reports

Must-know numbers and trends for high-interest groups. Recent reports include Teens, Instagrammers, Premier League Fans, Students and Business Travelers.

Profile Reports

Key trends and numbers across global services like Facebook, Twitter and Netflix.

Flagship Reports

Over-arching global trends across social networking, device usage, commerce, brand engagement and entertainment.

Insight Reports

Deep-dives into key digital themes, including Digital vs Traditional Media Consumption and the Sharing Economy.

Trend Reports

Tracking developments across zeitgeist topics like social commerce, ad-blocking and VPNs.

Tom Smith, CEO & Founder

Global Audience Data Can Change the World

When I founded GlobalWebIndex in 2009, my core motivation was to solve a marketing problem: the total failure of existing resources to provide the level of digital audience insight that 21st century marketing demands. Incredible as it sounds, it was totally impossible to understand an audience online, especially across multiple markets.

This was a problem of which I had first-hand experience. Prior to launching GWI, I worked as an agency researcher supporting global clients and I was completely unable to do my job with the tools and data sources that existed at the time. Our clients were constantly briefing us to deliver cross-market digital campaigns, and looking to invest in digital platforms across multiple markets, for which we could do nothing better than hold a finger in the air and guess.

The core reason for this was that legacy panel-based audience insight and measurement products were stubbornly local market (and still are), with almost zero comparable data across markets, regardless of whether built on market research or passive meters. This was fine in the analogue age where TV, radio and print could only operate within their market of origin, but for the digital age where platforms, content and information move freely without a thought for geographic borders, single market data-sets were (and are) archaic.

At the time, the industry feeling was that Passive Data, whether that be Analytics, Social Data or Big Data analysis, would erode the need for market research for audience insight and provide a global framework for developing marketing. Surely it's better to understand actual data, right? Well, the reality falls far short of the promise. Analytics in all its forms was (and still is) totally unfit for developing audience insight in the global age. This is primarily down to the fact that geo-targeting based on IP addresses is woefully inaccurate. The simple technology that underpins all ana-

lytics cannot cope with the complex world of proxies, VPNs and post-PC networks and it always overstates the size of the US audience. Every analytics geo-map always plots the US as the dominant source of traffic. In the global internet age where the US makes up less than 10% of the global internet universe, for the majority of publishers this simply shouldn't be the case. It would be fair to say that analytics is literally wiping billions of people off the map.

This problem is compounded by the reliance on utilizing cookie-based measurement that equates a device to a person. This leads to massive under-estimation of international audiences where device sharing is rife. These two endemic failures are key reasons why our data-set is built by combining market research directly with passive data at a respondent level.

In the real world, the pace of globalization has remained unstoppable. According to the ITU, over 3bn people are now online, with two thirds originating in emerging markets. With the ever falling costs of mobile computing, it is only a

matter of time until every human is connected. This technology spread is one of human history's great stories and the first technology revolution that has been truly global and democratic. In contrast, marketing budgets stubbornly refuse to globalize. At a macro level, eMarketer recently estimated that the USA and Western Europe represented 56% of global digital advertising investment in 2015, despite making up only 18% of the global internet population. Let's be clear: the core reason for this is bad data and localized measurement and it is not hyperbole to claim that billions of dollars of marketing are being mis-invested chasing phantom US audiences. Marketers continue to be blinded by bad data, missing the opportunity of a generation – to drive massive growth for their businesses by engaging audiences on a global scale.

Since launching we have been working day-in, day-out to fix this problem for marketers. We believe everyone who works in digital marketing needs single-source global data that allows a client to compare internet users in any location, whether that be in Brussels, Bangkok, Beijing or Belo Hori-

zonte. The need to be global drives all our developments and we continue to build our world footprint. For example, we recently rolled out a set of measurement solutions including advertising effectiveness, audience validation and website analytics that can all be delivered anywhere in the world. Today we are the only single-source global audience platform not only in digital but in marketing as a whole – something of which we're very proud. In 2016, we will continue to increase our global reach by expanding our audience panel to beyond 15m, adding mobile sampling and continuing to on-board key internet markets.

As a client, hopefully you will agree that using single source global data is truly disruptive. It identifies opportunities you would never otherwise find and creates marketing you could never action with localized data-sets. It enables you to identify what makes a market's digital behavior unique, ensuring that all multi-market strategies are truly localized to the behaviors and cultures that exist in different markets. It also enables the identification of massive cross-border target audiences for your brand, audiences that can drive

huge business growth. This also enables budgets to be set accurately for the first time, and it has been proven with numerous cases that our data has helped the flow of marketing budget to so-called emerging markets, where digital audiences are huge and often more engaged. Even if you are only operating in a single market, global data can enable better strategy by providing accurate context on what makes your market unique. Single market datasets the world over will tell you the same story as they do not have the benefit of context. For publishers and content owners, we enable the validation and monetization of audience that was previously invisible.

While I set out to solve a marketing problem, I have come to learn that global audience data can also have a more profound impact. GWI is for the first time putting billions of internet users on the map. This we believe will help all internet users to get their fair share of digital investment, so they all get the platforms, apps, content and digital services that everyone deserves. Marketing can be at the forefront of this, by working to drive up digital budgets in all markets.

Where advertising flows, digital investment will follow. This is how global audience data can help change the world. As clients you can help make this happen, by embracing global data and, crucially, a global mindset.

We're proud to say that our approach is resonating very strongly with digital marketers. 2015 was another incredible year of growth, doubling users and revenues. Today, over 1200 organizations actively use GWI as their basis for developing digital audience Insight and we look forward to working with ever increasing numbers of you next year.

Tom Smith,
CEO & Founder

Jason Mander, Director, Research & Insight

Profiling the Digital Consumer: The Case of Social Networking

Of all the digital stats I've come across over the last year, there's one that struck me particularly strongly: the average internet user now belongs to more than six different social networks/platforms. That's up from just three back in 2012 and underlines the sheer speed with which multi-networking has become a mainstream trend. It's particularly pronounced among younger age groups as well as in fast-growth markets (particularly in APAC), but it's present in every demographic segment and in every world region.

For the planners among you, that begs the question: how do you target your audience effectively when social networking behaviors have become so fragmented and diversified? How do you know which of the various platforms out there need to be prioritized, especially

when their own self-published engagement metrics seem so different and – at times – contradictory. Is Facebook still top dog, for example? Has Instagram really overtaken Twitter when it comes to active usage? Even if it has, could Twitter's claim to have significant numbers of logged-out visitors mean it's still the more important one to target? And perhaps most crucially of all, what's happening at a country or demographic level? Beyond the global headlines, what matters most for your particular user segment?

This is one of the many places where we believe GlobalWeb-Index's impartial data becomes especially powerful. Firstly, we measure engagement in the same way across all services. So, while Facebook's own definition of an active user might be quite different to the ones used by names like Twitter, Snapchat or WeChat, we use one metric for all. That allows us to make like-for-like comparisons and fair rankings.

Secondly, we have 4,500 self-reported data-points on each of our 200,000 annual respondents. That means an individual is only counted as an active user in our research if they consider themselves to be one. In traditional analytics data, someone could potentially be counted as an active user if they remain logged into an app without actually using it. Or

if they've visited a webpage but not actually done anything while there. As far as we're concerned, that's not really active usage in the way most people would define it.

Thirdly, and most significantly, we can marry someone's cross-device internet behaviors with their motivations and attitudes. As we're profiling individuals rather than devices or IP addresses, we can understand why people use social networks, which combinations of services they're using and how that's changing over time. So, our data shows how many Facebookers use Snapchat too, for example. And it reveals things such as Instagrammers being furthest ahead of average for using social networks in order to follow celebrities and to avoid "FOMO" (fear of missing out), whereas Google+ users over-index the most for work-related usage and Facebookers are most ahead for wanting to stay in touch with what their friends are doing.
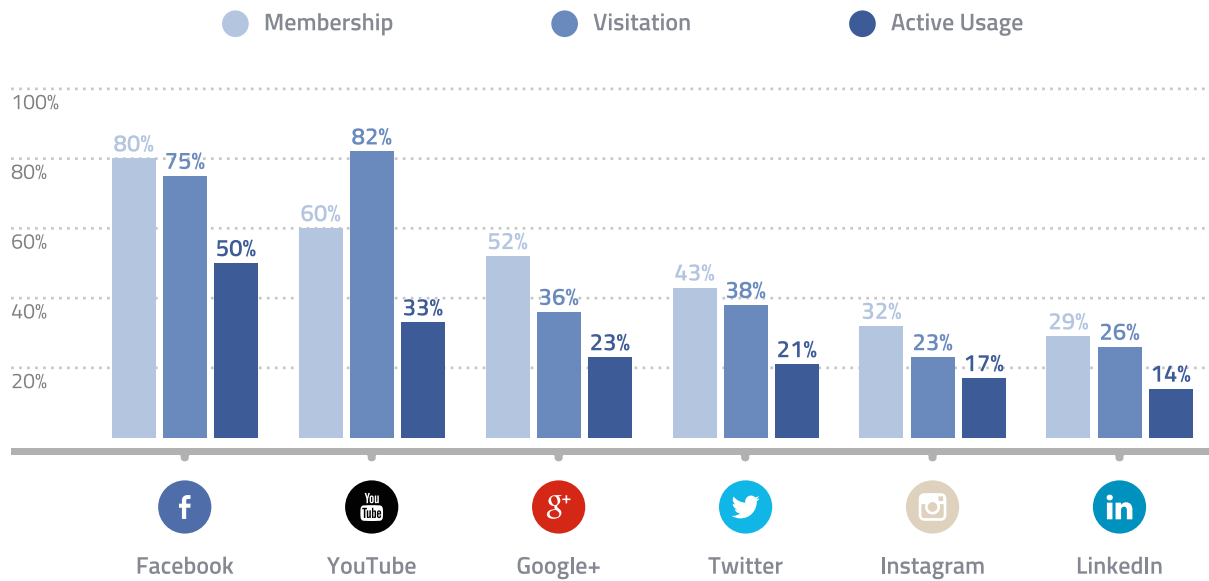
To demonstrate the power of this in action, let's take stock of some numbers. On traditional social media metrics like membership and active usage, there's no doubt that Facebook remains the dominant force. Outside of China, 8 in 10 online adults have an account on the service and some 50% are actively using it.

However, membership and active usage don't tell the whole story here. If we take the six biggest social platforms globally and add the extra metric of visitation into the mix, then YouTube takes the lead. In short, more people are visiting YouTube than Facebook, and that's a trend that holds true in all age groups as well as in 28 of the 33 countries being considered here.

The battle between Instagram and Twitter is interesting too. Use like-for-like engagement metrics across both services and Instagram is narrowing the gap in terms of active usage. Even so, Twitter remains leagues ahead in terms of visitation and that's an important differentiation to keep in mind for any campaign.

One of the biggest challenges for Facebook comes from looking at some of our trended data on social media engagement. Back in 2012, its users were typically active on 2.5 networks (including Facebook itself). Minor quarter-by-quarter fluctuation aside, this number has been increasing on an annual basis, **with Facebookers now actively engaging with 4.6 networks.**

TOP 6 SOCIAL PLATFORMS
MEMBERSHIP, VISITATION AND ACTIVE USAGE

● Membership   ● Visitation   ● Active Usage

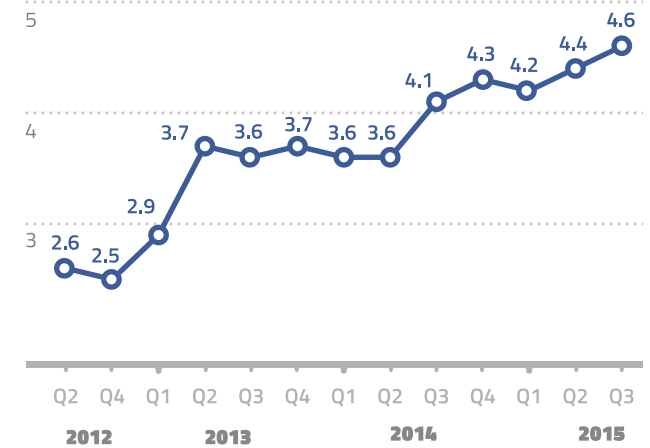|	Facebook	YouTube	Google+	Twitter	Instagram	LinkedIn
Membership	80%	60%	52%	43%	32%	29%
Visitation	75%	82%	36%	38%	23%	26%
Active Usage	50%	33%	23%	21%	17%	14%

Membership: On which of the following services do you have an account? // **Visitation:** Which of the following sites/applications have you visited in the past month via your PC/Laptop, Mobile or Tablet? // **Active Usage:** Which of the following services have you used or contributed to in the past month using any type of device? /// **Base:** Internet Users aged 16-64, exc. China /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here: **Cross Device > Web Brand Visitation**

AVERAGE NUMBER OF SOCIAL NETWORKS
USED BY FACEBOOKERS

Q2 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
2.6	2.5	2.9	3.7	3.6	3.7	3.6	3.6	4.1	4.3	4.2	4.4	4.6

Question: Which of the following services have you used or contributed to in the past month using any type of device? e.g. PC/Laptop, Mobile phone, Tablet, etc. /// **Base:** Facebook Active Users aged 16-64 /// **Source:** GlobalWebIndex Q2 2012 - Q3 2015

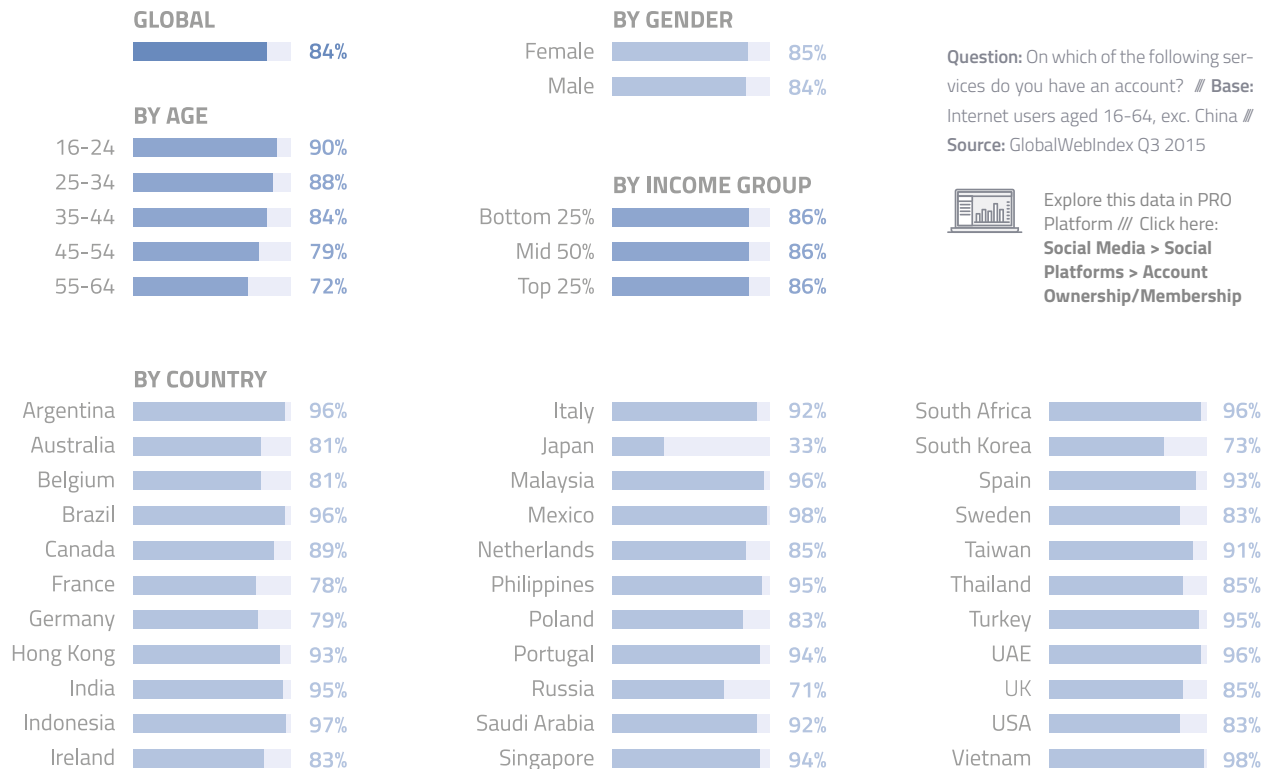Explore this data in PRO Platform /// Click here: **Social Media > Social Platforms > Active User**

Roughly speaking, that means that – compared to 2012 – Facebook now has to compete with an additional two networks for the attention of its users. And that's a trend which remains consistent even if you strip out the Instagram-effect (i.e. even if you allow for Facebook's own acquisitions within these numbers, its users are still engaging with a broadening range of networks).

Facebook does have a trump card to play, however. Look across its entire eco-system of services and it's some **84% of online adults who are a member of at least** *one* **of its four main services** (Facebook, Facebook Messenger, WhatsApp or Instagram).

What's more, the demographics are particularly revealing here. Engagement is equal by income and gender but it's the youngest age group who are furthest in the lead – with a striking **90% of 16-24s belonging to at least one of the four services.** That's food for thought the next time you hear that Facebook has lost relevance among the youngest users; even if some people might have moved away from the main site itself, chances are that they've started using one of its other services. And that's the beauty of tracking individuals rather than IP addresses: you don't just get information about how people are using one service on one device, you get a total, cross-device profile of their digital behaviors.

ENGAGEMENT WITH FACEBOOK SERVICES

% who have an account on Facebook, Facebook Messenger, WhatsApp or Instagram

GLOBAL

	84%

BY AGE

16-24	90%
25-34	88%
35-44	84%
45-54	79%
55-64	72%

BY GENDER

Female	85%
Male	84%

BY INCOME GROUP

Bottom 25%	86%
Mid 50%	86%
Top 25%	86%

Question: On which of the following services do you have an account? // **Base:** Internet users aged 16-64, exc. China // **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here: **Social Media > Social Platforms > Account Ownership/Membership**

BY COUNTRY

Country	%	Country	%	Country	%
Argentina	96%	Italy	92%	South Africa	96%
Australia	81%	Japan	33%	South Korea	73%
Belgium	81%	Malaysia	96%	Spain	93%
Brazil	96%	Mexico	98%	Sweden	83%
Canada	89%	Netherlands	85%	Taiwan	91%
France	78%	Philippines	95%	Thailand	85%
Germany	79%	Poland	83%	Turkey	95%
Hong Kong	93%	Portugal	94%	UAE	96%
India	95%	Russia	71%	UK	85%
Indonesia	97%	Saudi Arabia	92%	USA	83%
Ireland	83%	Singapore	94%	Vietnam	98%

Ali Little, Director, Product & Marketing

Delivering Active & Passive Data for the Ultimate Consumer View

2015 was a transformational year for us at GlobalWebIndex, as we continue to deliver on our core vision. We are committed to providing the global marketing industry with the most revealing digital audience data, in the most performant analytics platform, supported by the most responsive client services team in the industry.

10 MILLION PEOPLE

A major milestone in our journey has been surpassing 10 million active internet users in the **GlobalWebindex Panel,** which spans more than 34 countries. We leverage this reach for providing advanced measurement via our GWIQ™ audience analytics solution, as well as collecting the data that is available in our syndicated study. All of our panelists are 'doubled opted-in' for tracking in digital environments, and contactable directly, meaning we can explain any interaction with your customers and target audiences using the 4,500 data points in the GlobalWebIndex taxonomy (as well as any other profiling points that may be of interest).

The key advantage to this is bridging the gap between marketing strategy and activation. Our **GWIQ™ Audience Targeting Validation** solution demonstrates our unique ability to forge new ground in this area. Audience-centric marketing requires the buyers and sellers of advertising to demonstrate an ability to connect with hyper-defined segments. By enabling our clients to quantify the accuracy of their media targeting using the full granularity of our data set, they can move away from validating accuracy using proxy attributes that only marginally represent a brand's target audience.

COUNTRY	PANEL SIZE	COUNTRY	P. SIZE	COUNTRY	P. SIZE
USA	6,059,482	Colombia	42,951	Saudi Arabia	15,076
UK	684,231	Argentina	42,416	Taiwan	13,684
Canada	676,977	Philippines	41,078	Sweden	13,617
Japan	395,597	Netherlands	39,726	Portugal	13,567
India	330,391	Turkey	39,019	Hong Kong	13,113
Germany	310,548	Thailand	36,608	Puerto Rico	13,113
Brazil	288,181	Chile	33,950	UAE	12,311
Australia	287,260	Malaysia	28,517	Belgium	11,033
France	247,113	South Africa	27,272	Nigeria	9,120
China	164,015	Poland	22,765	Vietnam	8,013
Mexico	142,303	Singapore	22,765	Greece	7,940
Russia	109,870	New Zealand	22,243	Hungary	5,736
Italy	102,521	Ireland	22,008	Switzerland	5,543
Spain	99,610	Venezuela	18,752	Finland	5,267
Indonesia	71,304	Egypt	17,167	**TOTAL PANEL SIZE**	
South Korea	68,176	Peru	15,586	**10,758,383**	

An example in action: let's say you're looking to activate a campaign targeted to female 'fashionistas', with a strong influence in social media, a high degree of disposable income and ownership of an iOS or Android device. This is typical of the granularity required in enterprise-level marketing. To date, marketers have been able to validate the accuracy of targeting these types of segments using demographic attributes such as age, gender and income. The result of this is a methodology that measures against a very large proxy segment, within which your desired audience exists as a very small sub-segment. GWIQ™ has enabled marketers to measure directly against the specific audiences they are trying to engage (the definitions of which likely contain myriad attributes beyond demographics) using the known-truth data we amass from our global panel.

This approach, coupled with our innovations in **Advertising Effectiveness** and deeper **Website Analytics**, is reflective of our belief that a blend of active and passive data provides the most usable insights for marketers. Active data (in our case underpinned by the ongoing study we conduct across 34 countries) combined with passively-collected behavioral data (such as that from our GWIQ™ tag-based analytics solution) deliver observed actions alongside deeper insight such as the motivations behind the behavior. This level of design in data is key to creating the most accurate view of the consumer, that goes beyond observing devices to anticipating the actions of real people.

COMBINING ACTIVE & PASSIVE DATA

GWIQ™ has been a major step forward in marrying the world's largest study on the digital consumer with our clients' web and advertising analytics. 2016 will see us continuing our focus on enabling clients to leverage their first-party data in combination with ours, as well as connecting to other sources of insight.

We whole-heartedly believe in the power of this. Survey data is remarkably revealing with regards to understanding behaviors across platforms, but can be top-level when attempting to recall very specific actions such as spend amounts. Conversely, passive data can capture a huge wealth of log-level information such as product purchases or video views, but has failed entirely to accurately profile audiences at scale — principally due to the absence of technologies that can cater for shared device usage, multi-device ownership, cookie attrition, IP-masking and other challenges for analytics. Heightening these issues is the acceptance of the industry to accept inferred data points as actual behaviors, which typically happens when vendors group very different log-level actions into a single segment.

Our own analysis has shown cookies to be around 40% accurate when attempting to identify real people consecutively over the course of a month, a number that is strikingly similar to the findings of Atlas by Facebook. Knowing who our panelists are, and having deterministic IDs tied to panelists' login credentials, has enabled us to accurately de-duplicate users across devices, as well as cater for shared device usage and other third-party cookie-killing technologies such as operating systems, browsers, proxy servers and virtual private networks (VPNs).

Profiling people, rather than the devices they own, is the surest way to enable our clients to deliver marketing communications that can influence consumer actions and perceptions.

WORKING IN COLLABORATION WITH OUR CLIENTS

An approach that served us well throughout 2015 has been welcoming the contributions of our clients to our roadmap, and acting on those inputs with regard to feature prioritization and delivery. I have had the pleasure of speaking with many clients over the course of the year about our analytics and software solutions, which has helped us focus our engineering efforts and bring the most powerful feature sets to market.

In 2016, I look forward to continuing those conversations and starting many more. As ever, please don't hesitate to get in touch - your view is hugely appreciated.

Ali Little

Please direct any thoughts or commments to al@globalwebindex.net,
or drop him a line on +44 (0) 7943 298 091.

TRENDS 15

THE NUMBERS THAT MATTERED OVER THE LAST YEAR

JAN

NETFLIX BEGINS TO BLOCK VPN USERS

Top 10 Markets for VPN Usage

% of who have used a VPN to access the internet [Q1-Q3]

Indonesia	42%	UAE	35%
Thailand	39%	Vietnam	35%
Brazil	36%	India	34%
Turkey	36%	Taiwan	33%
Saudi Arabia	36%	Malaysia	32%

SNAPCHAT LAUNCHES DISCOVER FEATURE

Top 5 Snapchat Markets among Teens

% of teens using Snapchat [Q1-Q3]

Indonesia	42%	UAE	35%
Thailand	39%	Vietnam	35%
Brazil	36%	India	34%
Turkey	36%	Taiwan	33%
Saudi Arabia	36%	Malaysia	32%

SHAZAM REACHES VALUATION OF $1BILLION

Music Buying among Shazam Users

% of Shazam Users who purchased a music download last month [Q1-Q3]

16 to 24	29%
25 to 34	37%
35 to 44	36%
45 to 54	25%
55 to 64	21%

FEB

SUPER BOWL SUNDAY

Top 5 Markers for Following the NFL

% who say they watch the NFL on TV [Q1-Q3]

USA	53%
Mexico	46%
India	31%
Canada	27%
Vietnam	26%

TWITTER UNVEILS NEW HOMEPAGE

Top 10 Markets for Twitter Visitation

% who visited Twitter in the last month [Q1-Q3]

Indonesia	69%	Philippines	51%
Saudi Arabia	62%	UAE	48%
Turkey	62%	Argentina	45%
India	56%	South Africa	45%
Mexico	55%	Brazil	44%

AMAZON OPENS FIRST PHYSICAL STORE IN INDIANA, USA

Top 5 Purchase Drivers of Amazon Visitors

% of Amazon visitors who say the following are most likely to motivate them to buy online [Q2-Q3]

Free delivery	70%
Easy returns policy if items are unwanted	44%
Quick and easy checkout process	42%
Financial rewards/incentives (e.g coupons)	41%
Reviews from other consumers / customers	39%

MAR

PREMIUM SERVICE TINDER PLUS LAUNCHED

Paid-for Online Dating among Tinder Users

% of Tinder Users who paid for an online dating service last month [Q1-Q3]

16 to 24	20%	45 to 54	26%
25 to 34	33%	55 to 64	24%
35 to 44	33%		

FACEBOOK "LIKE-POCALYPSE" SEES MILLIONS OF 'LIKES' REMOVED

Top 5 Actions on Facebook

% of Facebook active users who did the following last month [Q3]

Clicked the "like" button	66%
Watched a video	51%
Messaged a friend on a 1-to-1 basis	50%
Commented on a friend's photo or video	48%
Read an article	47%

APPLE BEGINS TRADE-IN SCHEME FOR ANDROID PHONES

Purchase Consideration among Android Users

% of Android mobile OS users who say they would definitely consider buying the following handset brands [Q1-Q3]

iPhone	32%
Samsung	30%
Sony	17%
Huawei	16%
Xiaomi	14%

APR

APPLE WATCH LAUNCHES

45% of Smartwatch owners in UK/USA own an Apple Watch *[Q2-Q3]*

10th ANNIVERSARY OF YOUTUBE'S 1st VIDEO

The Popularity of YouTube

% of internet users outside of China who... [Q3 2015]

Are Members of YouTube	**60%**
Visited YouTube in the last month	**82%**
Actively used or contributed to YouTube in the last month	**33%**

TWITTER, GOOGLE+ AND FACEBOOK CENSORED IN TURKEY

Social Media Usage among Turkish VPN Users

% of Turkish VPN users who visited the following last month [Q1-Q3]

Facebook	**89%**
Twitter	**72%**
Google+	**52%**

MAY

SNAPCHAT VALUED AT $16 BILLION

The Age Profile of Snapchatters

% of Snapchat Active Users who are... [Q3]

16 to 24	**52%**
25 to 34	**30%**
35 to 44	**12%**
45 to 54	**5%**
55 to 64	**1%**

US PRESIDENT OBAMA GETS A TWITTER ACCOUNT

Top 5 Markets for Visiting a Celebrity's Twitter Feed

% of Twitter Active Users who visited a celebrity's feed last month [Q1-Q3]

Philippines	**42%**
Turkey	**36%**
India	**33%**
Thailand	**33%**
Taiwan	**32%**

JUN

FACEBOOK MESSENGER REMOVES NEED FOR FACEBOOK MEMBERSHIP

Popularity of Facebook Messenger by Region

% of internet users who have an account on Messenger [Q3]

Asia Pacific (exc. China)	**55%**
Europe	**40%**
Latin America	**72%**
Middle East and Africa	**56%**
North America	**46%**

APPLE MUSIC LAUNCHES

Apple Music's Competitors

% of iPhone owners who listened to the following services last month [Q3]

Google Play Music	**15%**
Spotify	**14%**
Pandora	**11%**
SoundCloud	**10%**

GOOGLE ANNOUNCES YOUTUBE GAMING

YouTube's Crossover with Twitch

% of YouTube Active Users who are Visiting Twitch.tv [Q3]

16 to 24	**9%**	45 to 54	**1%**
25 to 34	**4%**	55 to 64	**1%**
35 to 44	**3%**		

JUL

GOOGLE CONFIRMS INTRODUCTION OF "PURCHASES ON GOOGLE"

65% of Google visitors purchased a product online last month *[Q1-Q3]*

AMAZON'S MARKS 20TH BIRTHDAY WITH "PRIME DAY"

Top 5 Markets for Amazon
% who visited Amazon last month [Q3]

India	**81%**
Germany	**77%**
UK	**74%**
US	**71%**
Italy	**68%**

APPLE PAY LAUNCHES IN THE UK

% of iPhone 6/6Plus and Apple Watch owners who... [Q3]

Have used Apple Pay	**39%**
Have not used Apple Pay but are interested in doing so in the future	**31%**
Have not used Apple Pay and are not interested in doing so in the future	**30%**

AUG

TENCENT INVESTS IN KIK MESSENGER

Top 5 Markets for Kik Messenger *[Q3]*

Sweden	**9%**
Saudi Arabia	**8%**
India	**5%**
USA	**4%**
Indonesia	**4%**

GOOGLE BRINGS TWEETS TO DESKTOP SEARCH RESULTS

Top 5 Product Research Channels
% who use the following when actively looking for more information about brands, products, or services [Q3]

Search engines	**52%**
Consumer reviews	**34%**
Social networks	**32%**
Product/brand sites	**32%**
Price comparison websites	**29%**

SEP

INSTAGRAM CLAIMS TO PASS THE 400M USER MARK

The Growth of Instagram
% outside of China who say they actively use Instagram

Q2 2013	**7%**	Q3 2014	**15%**
Q3 2013	**8%**	Q4 2014	**13%**
Q4 2013	**8%**	Q1 2015	**14%**
Q1 2014	**9%**	Q2 2015	**15%**
Q2 2014	**10%**	Q3 2015	**17%**

ADBLOCKING FUNCTIONALITY ARRIVES ON APPLE'S IOS

Ad-Blocking by Age
% who have used an adblocker on their main computer in the last month [Q1-Q3]

16 to 24	**33%**	45 to 54	**21%**
25 to 34	**21%**	55 to 64	**17%**
35 to 44	**24%**		

APPLE ANNOUNCES RECORD SALES OF IPHONE 6S

Top Models among US iPhone Owners *[Q3]*

6	**26%**	4S	**11%**
5S	**21%**	6Plus	**11%**
5C	**11%**		

YOUTUBE INTRODUCES SHOPPING ADS

67% of YouTubers bought a product online in the last month *(Q1-Q3)*

OCT

TWITTER LAUNCHES 'MOMENTS'

% of Twitter active users who did the following last month [Q3]

Read a news story	36%
Logged in to see what is happening without posting/commenting on anything myself	31%
Watched a video	28%
Tweeted a friend	28%
Retweeted a friend	28%

FACEBOOK TESTS A DEDICATED SHOPPING FEED

11% of Facebook active users say that the chance to buy on a social network would make them more likely to purchase a product

YOUTUBE RELEASES ITS PAID SUBSCRIPTION SERVICE YOUTUBE RED

Top 5 Types of Online Content Bought by YouTubers

% of YouTube active users who paid for the following last month [Q3]

Application for mobile phone	21%
TV/Film Streaming Service	19%
A game on your mobile phone	19%
Music download to keep	18%
E-book	17%

NOV

PLAYSTATION 4 ANNOUNCES SALES OF 30 MILLION CONSOLES

% of internet users who are interested in purchasing the following [Q3]

PlayStation 4	18%	PlayStation 3	8%
Xbox One	10%	Nintendo Wii U	8%
Xbox 360	10%	Nintendo Wii	7%

PINTEREST ADDS BUYABLE PINS

45% of Pinterest active users say they use social networks to research products *[Q3]*

GOOGLE+ LAUNCHES NEW INTERFACE

% of internet users who used Google+ last month [Q3]

Asia Pacific (exc. China)	27%
Europe	20%
Latin America	32%
Middle East and Africa	29%
North America	17%

FACEBOOK ADDS SNAPCHAT-STYLE MESSAGING

% of Facebook Messenger Users who use Snapchat [Q3]

16 to 24	26%
25 to 34	14%
35 to 44	8%
45 to 54	6%
55 to 64	4%

DEC

TUMBLR EXPANDS INSTANT MESSAGING TO ALL USERS

% of Tumblr active users who used the following last month [Q3]

Facebook Messenger	65%
WhatsApp	52%
Skype	47%
Snapchat	38%
Google Hangouts	28%
LINE	26%
Viber	24%
WeChat	22%

WINDOWS 10 LAUNCHES ON MOBILE

Top 5 Markets for Microsoft Phones

% who own a Microsoft handset [Q3]

USA	12%
South Korea	12%
India	12%
Philippines	11%
South Africa	11%

NBC STREAMING SERVICE SEESO LAUNCHES BETA VERSION

Top OTT Video Services in the USA *[Q3]*

Netflix	51%	HBO Now	9%
Amazon Video	19%	Crackle	8%
Hulu	18%	Vimeo	7%
HBO Go	13%	Vudu	7%

TRENDS 16

10 KEY TRENDS TO WATCH
IN THE YEAR AHEAD

Every twelve months, trend forecasters are fond of saying that the year to follow will be the one when a certain device or behavior becomes dominant or widespread. Some have thus seen 2016 as the year in which wearables will finally convert on their promise. Others have focused on native content, ad-blocking or social commerce as the themes to watch. But look through all of these predictions and there's one constant that underlies pretty much all of them: mobile.

Of course, people have been talking about the "Year of the Mobile" ever since the first mainstream smartphones rolled off the production lines back in the noughties. As a result, it's hardly ground-breaking or daring to suggest that these devices are the ones to watch in 2016. Even so, crunch some of the numbers from GWI's ongoing research and there are several reasons why mobiles will be dominating trends and behaviors over the next twelve months.

As an internet access point, the speed with which mobiles have established themselves is striking. Way back in 2011, it was just 51% of internet users who were getting online via these devices; fast forward to the close of 2015 and that figure now stands at 75% (rising considerably higher in certain demographic segments or markets). Nevertheless, 2016 marks a particularly important moment in this process: while smartphones have long challenged PCs/laptops when it comes to the most popular or commonly owned device, they're now starting to overtake them in terms of time spent online too.

MOBILE INTERNET ACCESS

% of online adults accessing the web via mobile
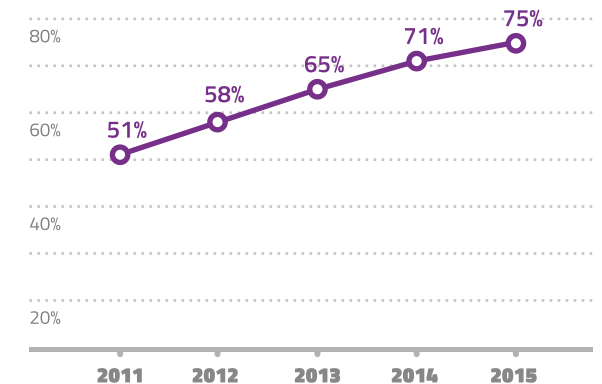
Question: In the past month, from which of the following devices have you accessed the internet either through a web browser or an application? /// Base: Internet Users aged 16–64 /// Source: GlobalWebIndex

In the year ahead, Saudi Arabia will become the first of GWI's 34 markets where online adults spend more time online on a mobile than all other devices combined. That the smartphone could capture more time than PCs, laptops and tablets combined is a pretty remarkable achievement for a small device which, however you cut it, simply cannot offer exactly the same functionality as larger ones. It's a theme we consider in the **Mobile Tipping Point** and is one which brings considerable implications for how and where brands can hope to engage consumers.

This becomes particularly important in light of ad-blocking making its way to mobiles. No longer are smartphones a point of refuge amid the rising tide of blocking; instead, they could be at the very forefront as awareness and availability of the tools in question continue to increase. And in **Ad-blocking is a Young Person's Game,** we consider how this behavior is likely to spread to older demographics, having so far been most popular among the younger groups. In turn, The **Rise of Live Streaming** assumes a new importance – it's inevitable that native creative on mobile will receive a boost as

ad-blocking becomes more prolific. So too does it raise the prospects of some social networks moving **From Cookies to Commerce,** with integrated buying options on social media services becoming more prominent and representing a more important source of revenue.

Snapchat is a particularly key name to watch here. Under pressure to monetize its relatively small but still growing user-base, **Why Snapchat Can't Get Old** considers why it's better for the service to push on with revenue streams centered around content and commerce rather than looking to win new users in older demographics.

What will be encouraging for all social networks here are the signs that certain mobile behaviors could finally break into the mainstream in the year ahead. To date, activities like instant messaging and music streaming have seen strong adoption on mobile devices, whereas content- or commerce-related ones have remained more firmly wedded to the larger screens of PCs and laptops. But there's real headway being made here; as we discuss in **M-Commerce Finally**

Gets Mainstream, younger mobile-centric consumers are now happy to use their phones rather than larger devices to research medium- to low-value categories. Although there's still a reluctance to use them to complete transactions, interest levels in services such as Apple Pay, Samsung Pay and Google Wallet suggest that this will soon start to change. Combine the convenience they offer with the efforts being made by companies to become the dominant player in the mobile payments area, and 2016 should be the year where consumers in all world regions (rather than just APAC) begin viewing their mobiles as viable purchasing devices for all but the biggest-ticket items.

Search is another area where we could see transformations in the year ahead. Whereas search behaviors on PCs and laptops are fairly established and ingrained, there's far less consistency on mobile (with some of the processes employed on larger devices simply not translating effectively). That presents a huge opportunity for voice search, especially as this is another area where major players are battling to become the default go-to service. As we explore in **Search**

Finds its Voice, the fact that Facebook is set to enter the fray with M on Messenger will help to push up engagement and will considerably blur the lines between search and social networking. It's also another reason why social commerce could see a boost.

One consequence of mobile's continuing progress is that it gets harder for wearables such as smartwatches to prove their value as anything other than nice-to-have devices. Despite the arrival of the Apple Watch on the scene, ownership of premium wearables remains low and, as tracked in **Waiting for the Wearable Revolution,** it's unlikely that new arrivals expected in 2016 can help this sector to achieve mainstream rather than niche status. As mobiles get more and more useful, wearables need to find things they can do in superior ways if they are to find an audience at their current price-point.

It's not just wearables that face challenges in the year to come, though. To date, names like Uber and Airbnb have dominated their respective sharing economy marketplaces.

But as they look for global coverage, they now need to face local competitors in key countries such as India and China as well as new players on the scene in established markets. In **Where Next for the Sharing Economy,** we discuss how some of these names will be looking to diversify their offers/services in order to reach the potentially huge audiences offered by mobile.

That's especially important in fast-growth markets, where opportunities for future expansion are vast. In the mature internet countries across North America and Europe, internet penetration is now very high and there are relatively few adults yet to come online. But look at some emerging markets in LatAm, MENA and APAC and it can be a dramatically different picture: here, penetration can fall as low as 20% or under in countries such as India and Indonesia, meaning that tens if not hundreds of millions of online adults will be going online for the very first time as the rest of this decade plays out. The vast majority of these new users will be accessing via mobile and, as we explore in **Connecting India,** that's a key reason why global social networking and media

services are spending so much time and effort in developing mobile-lite versions of their offerings. To keep on growing, engaging these new mobile-first or mobile-only consumers will be key.

As all this happens, it's worth noting that PCs and laptops aren't being abandoned. Mobiles might be the big drivers of growth but larger devices still remain hugely important access points – especially as time spent online on these devices in recent years has declined only very slightly. Although some behaviors are becoming more and more mobile-centric, it's a multi-device approach to internet usage which is now most widespread. And that makes the importance of tracking individuals across devices more important than ever.

#1

The Mobile Tipping Point

That consumers are spending more and more time online on their smartphones is hardly dramatic news; for some time now, we've all seen internet behaviors being transformed as a growing number of activities migrate away from desktop and laptop PCs towards mobiles.

Even so, look at GWI's trended data on how much time people are devoting to various devices each day and there's one particularly striking landmark on the horizon: by 2018, young internet users will be spending more time on their mobile devices each day than on their PCs, laptops and tablets combined. It's this moment that we're calling the Mobile Tipping Point – and it's one which brings profound implications for how and when brands will communicate with consumers.

Certainly, there's a caveat to be made here, and it's that the Mobile Tipping Point will arrive at different points for different demographics and markets. Currently, the youngest consumers in our research – the 16-24s – are already spending an average of over 3.25 hours per day online on a mobile, representing an increase from just under 2 hours

TIME ONLINE ON MOBILE, BY AGE
Number of hours per day typically spent online on a mobile
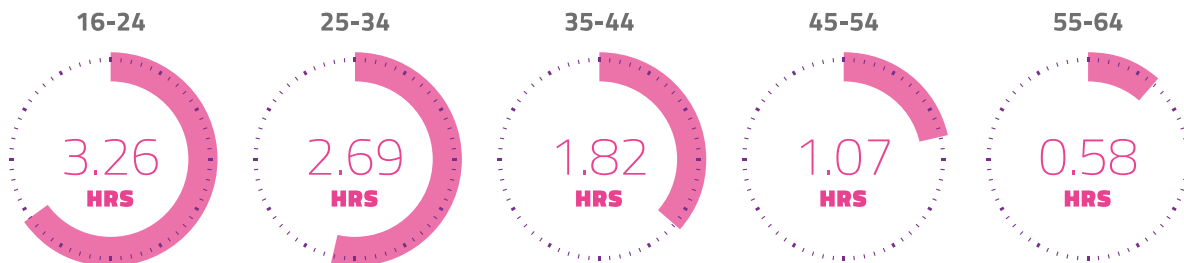
16-24	25-34	35-44	45-54	55-64
3.26 HRS	2.69 HRS	1.82 HRS	1.07 HRS	0.58 HRS

Question: Roughly how many hours do you spend online on mobile during a typical day?
/// **Base:** Internet Users Aged 16-64 /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here: **Media Consumption > Cross Media Consumption > Time Spent on Mobile**

TIME ONLINE ON MOBILE,
BY AGE - TRENDED BY YEAR

Number of hours per day typically spent online on a mobile
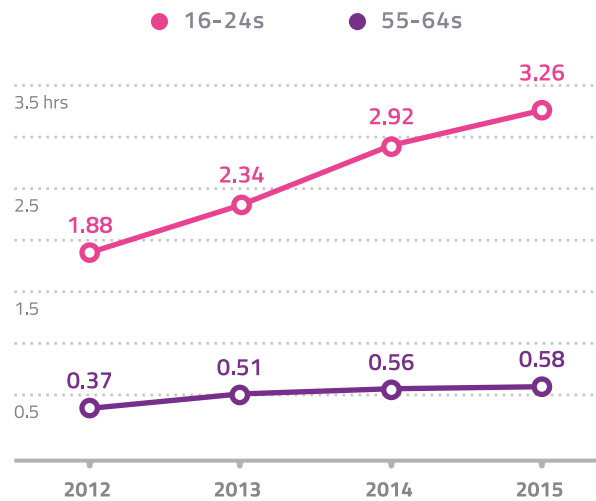
● 16-24s   ● 55-64s

3.5 hrs

2.5

1.5

0.5

	2012	2013	2014	2015
16-24s	1.88	2.34	2.92	3.26
55-64s	0.37	0.51	0.56	0.58

Question: Roughly how many hours do you spend online on mobile during a typical day? **//** **Base:** Internet Users Aged 16-64 **//** **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform **///** Click here:
**Media Consumption > Cross Media Consumption >
Time Spent on Mobile**

back in 2012. Look instead at the oldest group of consumers – the 55-64s – and the picture is quite different; this group spends just over 30 minutes per day online on their mobiles, with the figure having crept up only very slightly over the last few years.

The oldest group is also the only one where we're not seeing declines in time spent on PCs, laptops and tablets. Their much-documented love of tablets is one of the reasons behind this, but it does illustrate just how closely the Mobile Tipping Point is linked to demographics. So too does this have a strong knock-on influence over Mobile Tipping Points at a country level.

TIME ONLINE ON MOBILE, BY REGION

Number of hours per day typically spent online on a mobile.

● 2012   ● 2013   ● 2014   ● 2015

Region	2012	2013	2014	2015
Asia Pacific	1.44	1.78	2.25	2.53
Europe	0.89	1.14	1.36	1.57
Latin America	1.61	2.11	2.86	3.59
Middle East & Africa	1.98	2.39	3.09	3.43
North America	0.88	1.57	1.76	1.84
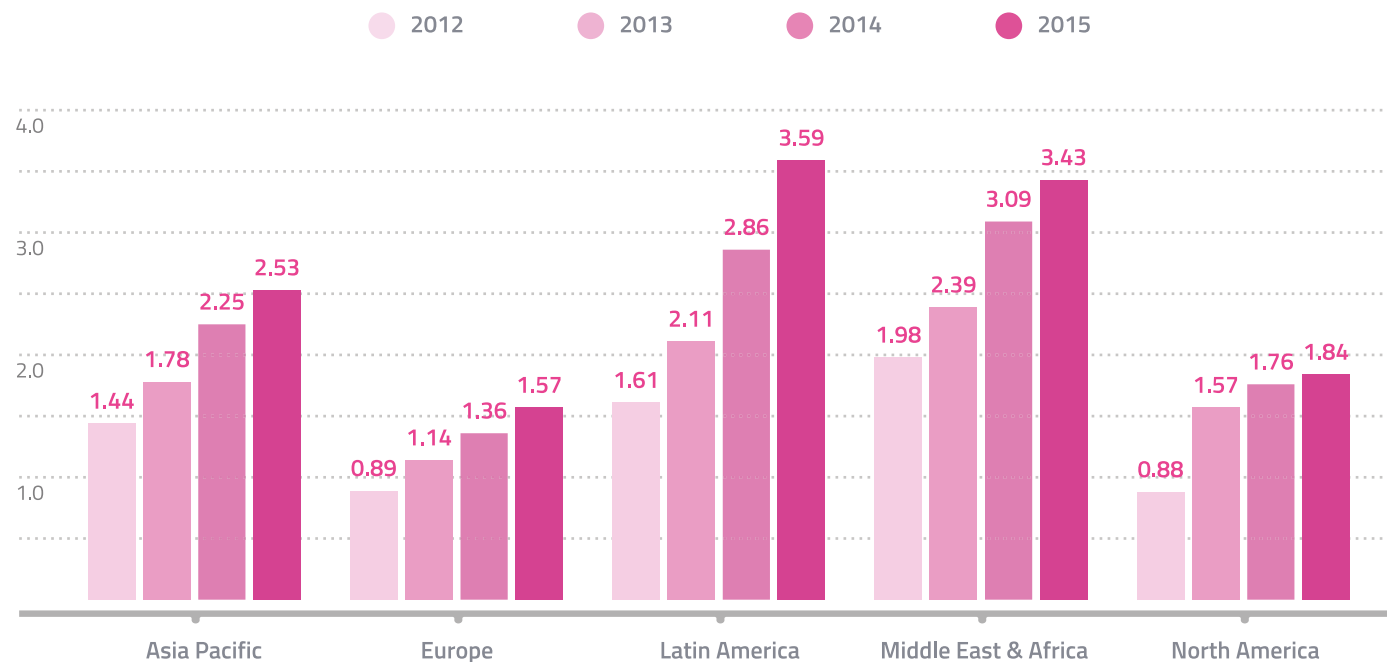
At the very forefront of the transition are fast-growth markets where internet penetration rates tend to remain relatively low and where online populations therefore have a younger age profile. Leading the pack are countries in the Middle East and Latin America. Across GWI's 34 markets, 16-24 year-olds in places such as Saudi Arabia, the UAE and Mexico reached the Mobile Tipping Point back in 2014 or early 2015. Now, the total online populations of these three markets are following closely behind, with Saudi Arabia forecast to be the very first to make the transition for its total internet population in 2016.

Explore this data in PRO Platform ///
Click here: **Media Consumption >
Cross Media Consumption >
Time Spent on Mobile**

Highly relevant here is the more fundamental role that smartphones have played in the development of internet infrastructure in regions such as LatAM and MENA, together with the fact that mobiles often remain much more vital internet access points than they do in mature markets.

But it's not just emerging countries which are ahead of the curve. Within the first group to see time on mobile outscoring time devoted to all other devices put together are Hong Kong, Japan and South Korea. 16-24s in these three countries will see this transition take place in 2016-17, with the wider populations following suit before 2020. It's no coincidence that all three have invested heavily in 4G infrastructure and rank among the top 5 countries in the world for mobile broadband speeds. If fast-growth markets are reaching the Mobile Tipping Points because of demographics and a relative lack of PC infrastructure, then the mature countries in APAC are crossing over because of their heavy investment in mobile.

Elsewhere, 2020 is set to be a particularly key year. By this point, we'll have seen the three countries with the largest internet populations in the world – the US, China and India – all move past or be on the very verge of hitting the Mobile Tipping Point. Given that these three together represent more than half of the world's internet users, the fact that mobiles are set to grab the majority of their online time by the end of the decade is a hugely significant milestone.

Towards the end of GWI's 34 markets are some perhaps rather surprising stragglers, including what most of us would think of as rather advanced tech markets like the UK, Singapore, Germany and Sweden. Demographics are once again key here. If we looked just at younger consumers in these markets, the transition will take place long before 2020. In contrast, examine behaviors among the large numbers of older internet users within their ageing populations and it's clear that they remain much more attached to traditional devices. They're still embracing mobiles, but time spent on PCs, laptops and tablets is not decreasing significantly and this causes an obvious delay to when they'll reach the Mobile Tipping Point. But that we'll still see them reaching the Mobile Tipping Point in spite of this is yet another sign of just how much mobiles are changing the game.

#2

Why Snapchat Can't Get Old

Although Snapchat remains some distance behind names like Facebook Messenger, WhatsApp and WeChat in terms of adoption, it's Evan Spiegel's app which has continued to grab headlines over the last year. It might have a relatively modest following on a global scale, but its continuing growth and huge popularity among teens means that it's still the one to watch in this space.

Since the end of 2013, Snapchat has seen the numbers engaging with its app almost treble from 3% to 8%. Though such user figures may seem unimpressive in light of those posted by Facebook Messenger (37%) or WhatsApp (34%), what continues to set Snapchat apart are the demographics of its user base: 82% of Snapchatters come from the youngest two age groups tracked by GWI and it does extremely well among the much-coveted teen segment. China aside, 22% of teens globally use Snapchat, with this figure reaching the 50% mark in key markets like Canada, Sweden and Ireland. In fact, Evan Spiegel's app is now ahead of WhatsApp or Messenger for teen usage in parts of North America and Western Europe. And in some places, it's not far from toppling even the main Facebook app.

Explore this data in PRO Platform /// Click here:
Apps > Specific Applications > Specific Applications Used

Teens   **All Internet Users**

44%

North America

12%

31%

Europe

Asia Pacific

5%   **5%**   **3%**

8%

Latin America

20%

22%

10%   Middle East & Africa
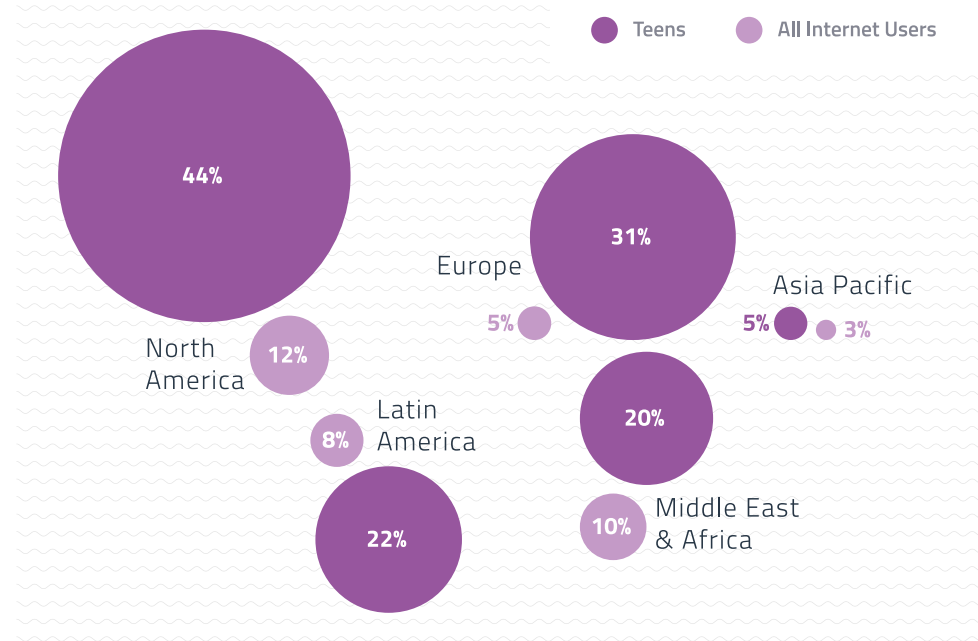
REGIONAL POPULARITY OF SNAPCHAT
% of internet users and teens in each region who use Snapchat
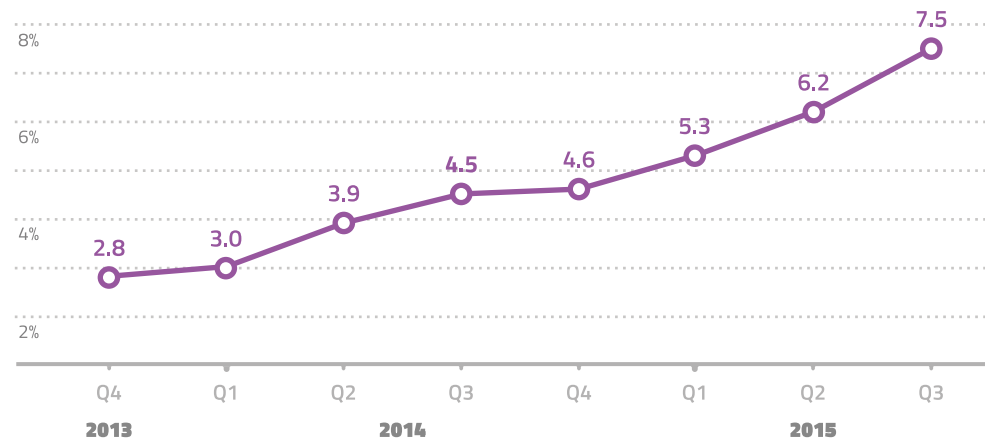
SNAPCHAT'S GROWTH OVER TIME
% who say they have used Snapchat in the last month

8%

7.5

6%

6.2

5.3

4.5   4.6

4%

3.9

2.8   3.0

2%

Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3
2013   **2014**   **2015**

33

Like so many other services in this area, Snapchat's challenge is to drive revenue from its users; after all, headline writers and investors might like consistent growth, but it's monetizing the audience in question which matters most. We'd already seen the introduction of "Discover", which about 1 in 4 Snapchatters say they use, but over recent months this has been supplemented by the arrival of paid-for and sponsored lenses, geo-filters, 'speed modifiers' for videos and paid-for replays of snaps.

Look at the general online behaviors of Snapchatters and there are plenty of positives here. It's not just that 56% of Snapchatters say they follow their favorite brands on social media. It's also that Snapchatters over-index hugely for using social networks to find entertaining content such as articles or videos; some 60% cite this as a key motivation. They are also 68% ahead of average for viewing branded videos.

TOP 10 SNAPCHAT ACTIONS
% of Snapchatters who did the following last month

💬	Sent a message	70%
🖼	Sent a photo snap	61%
👤⁺	Added a friend	53%
▶	Sent a video snap	47%
●	Created or viewed a story	45%
💬	Video chatted with a friend	31%
👻	Viewed the Snap Channel	31%
⠿	Contributed to or viewed a Live Story	30%
⣿	Used Discover	26%
♥	Started following a new brand/company	21%

Perhaps ironically, one of the most promising moves within all this has been the shift away from purely ephemeral messaging in the form of paid-for replays and the introduction of "Live Stories". Disappearing Snaps may appeal to many – and were one of the core reasons why the service first became popular – but in today's multi-networking landscape it means that Snapchatters wanting to swap photos permanently have to turn to another platform. It's surely telling that three quarters of Snapchatters also use Facebook Messenger each month, while around 3 in 5 use WhatsApp. With these apps having greater functionality than Snapchat, it seems likely that some are using rival services to carry out some of their sharing behaviors. So, just as Facebook has been working hard to introduce Snapchat-esque features to its own services, it's absolutely in Snapchat's interests to remove some of the reasons that users might have for looking elsewhere. This is about revenue and engagement.

In order to boost profits, some commenters have suggested that Snapchat should also be looking to broaden its user base to move beyond the youngest demographics. But it's not hard to see why this move could bring more damage than benefit: Snapchat's lack of cross-age engagement is one of the key reasons why teens like it so much. Without doubt, Snapchat is still the "cool" name at the moment but it might struggle if older groups start engaging and then something newer or more on-trend comes along and tries to woo its notoriously fickle young users. In short, it could only become genuinely mainstream if it attracted older users, but growth in this area is likely to deter its core users who have driven the app's success to date. Yes, young Snapchatters might be relatively cash-poor, but much better to find ways to monetize and broaden their existing engagement rather than attract older groups. In more ways than one, Snapchat simply can't get old.

MULTI-NETWORKING BEHAVIORS AMONG SNAPCHATTERS

% of Snapchatters who used the following apps last month
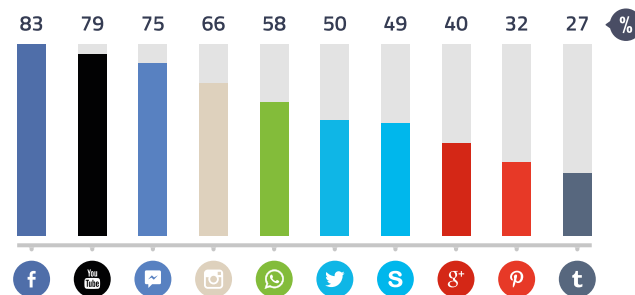
f	You Tube	💬	📷	whatsapp	twitter	skype	g+	pinterest	t
83	79	75	66	58	50	49	40	32	27

Question: Which of the following mobile / tablet applications have you used in the past month? (on any device) /// **Base:** Snapchaters aged 16-64 /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here:
Apps > Specific Applications > Specific Applications Used

AGE PROFILE OF MESSAGING APPS

% of active users in the following age groups

⚪ Snapchat   ⚪ WhatsApp   ⚪ Facebook Messenger

	16-24			25-34			35-44			45-54			55-64		
	52	31	28	30	32	33	12	21	22	5	12	12	1	5	5
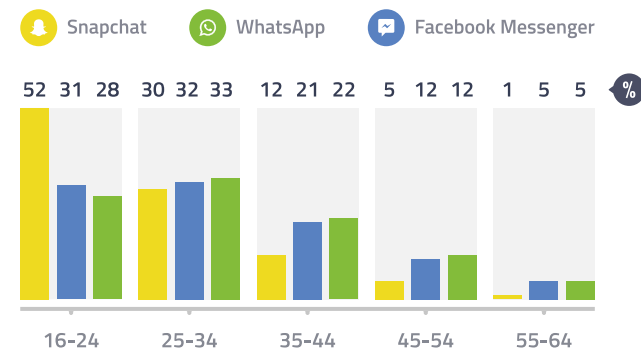
Question: How old are you? /// **Base:** Users of each messaging app aged 16-64 /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here:
Personal Profiling > Demographics > Age Groups

#3

Search finds its Voice

For most consumers, voice-powered search tools on mobile are yet to make a big impact; according to GWI's global data from our 34 markets, less than a fifth of online adults are regularly using them, putting them some distance behind traditional search engines. Yet with Facebook set to enter the fray with M – the AI-powered personal assistant tool that will sit inside its Messenger app – voice search could be about to get a whole lot more mainstream.

Certainly, there's no shortage of alternative voice tools on the market. From Apple's Siri and Microsoft's Cortana to Google Now and Baidu's Duer, consumers have a wide range of voice-powered search services at their disposal. Significantly, though, none of these other players can boast such a sizable and immediately available global mobile audience as Facebook Messenger. Nor, arguably, could they integrate their voice tool inside a service which is already so widely used by digital consumers. Outside of China, GWI figures show that over 50% of online adults have an account on Messenger – rising still higher in many individual mar-

USAGE OF VOICE SEARCH ON MOBILE
% of young mobile users who are using voice search tools...

47%
More than I did a year ago

31%
About as frequently as I did a year ago

10%
Less than I did a year ago

13%
I have never used this function

Question: How often would you say you use voice search functions on your mobile phone e.g. Siri, Cortana, Google Now or other voice recognition tools? /// **Base:** Mobile internet users aged 16-34 in Brazil, India, Italy, Malaysia, UK and USA /// **Source:** GlobalWebIndex Q3 2015

kets. That means Facebook could become a dominant player in this area even if just half of its (still growing) user base started engaging with M.

What's particularly important here is that there's a pronounced appetite for voice search among younger demographics – the segment that would be most important for Facebook to engage. Among young mobile users aged 16-34, just 13% say they haven't used voice search on their smartphone. Moreover, almost 50% say they are using this feature more frequently than they were a year ago, with another 30% reporting no change in their usage. So, once younger age groups begin using voice search on mobile, they're highly likely to continue engaging with it. That's an important statistic for the prospects of M on Messenger.

Ask people about their reasons for using voice search and there's further good news for Zuckerberg and co. Convenience might be key here – over 40% say they use voice search when driving or at other times when they can't interact with

TOP REASONS FOR USING VOICE SEARCH TOOLS ON MOBILE

43%   It is **quicker** than using a website/app

42%   I can **use it while driving**

38%   **It is more fun** than other search methods

38%   **It is easier** than using a website/app

28%   It is a **more accurate** way of searching

21%   **I don't like typing** on my mobile phone

1%   Other
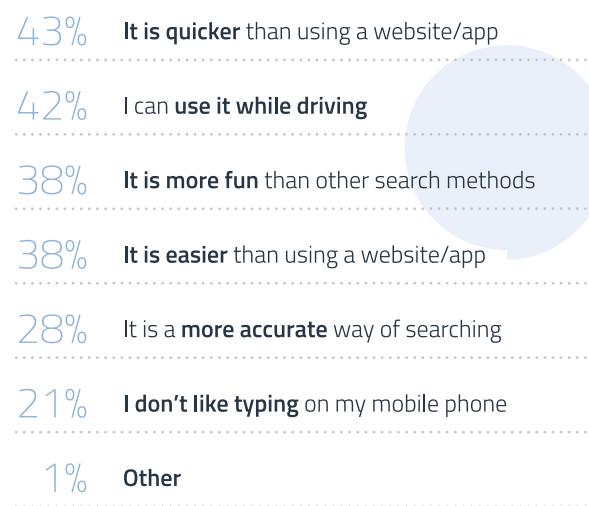
Question: What are you main reasons for using voice search on your mobile? /// **Base:** Mobile internet users aged 16-34 in Brazil, India, Italy, Malaysia, UK and USA /// **Source:** GlobalWebIndex Q3 2015

their handset – but about the same number believe it's a quicker or easier option than going to a dedicated search engine or app. What's more, about 40% see voice search as a more fun way of finding the information they need.

Certainly, the novelty factor of voice search won't last forever but it's not hard to see how it could be crucial in getting people to engage with it initially. As we've already seen, once you start using voice search on mobile you're pretty unlikely to drift away from it, and Facebook will know that emphasizing the convenience and fun of its new feature is likely to resonate very strongly with its young and engaged audience. Look at the qualitative responses among young users and it can also trade on one other important factor: many are using it because they are too lazy to type what they need. Equally telling is that the biggest barrier to engagement at the moment is one that's very easy to overcome: 40% of those not currently using voice search say they don't think it works particularly well. As the tools in question become more sophisticated and intuitive, this type of resistance could well disappear.

That Facebook is betting big on mobile voice search is a sign of how search behaviors are set to evolve. Already, 80% of internet users have a smartphone and, in many demographics and markets, mobiles have moved ahead of PCs/laptops as the most common or important way of accessing the internet. But traditional search providers and tools don't always have the same dominance on mobile as they have enjoyed on other devices, especially because search behaviors are so fundamentally different. With so much of the consumer's time on mobile being spent inside apps, there's an obvious benefit to being able to complete search actions inside the app being used rather than having to open up a separate one or use a mobile web browser.

What's more, social networks and mobile apps are already more natural product research channels for younger consumers than they are for older groups. Currently, about half of all online adults say they would normally turn to search engines for product research, compared to 30% who cite social networks. But among 16-24s, search engines dip a little while networks (and apps) both climb. They haven't overtak-

PRODUCT RESEARCH CHANNELS
% who use the following when researching products
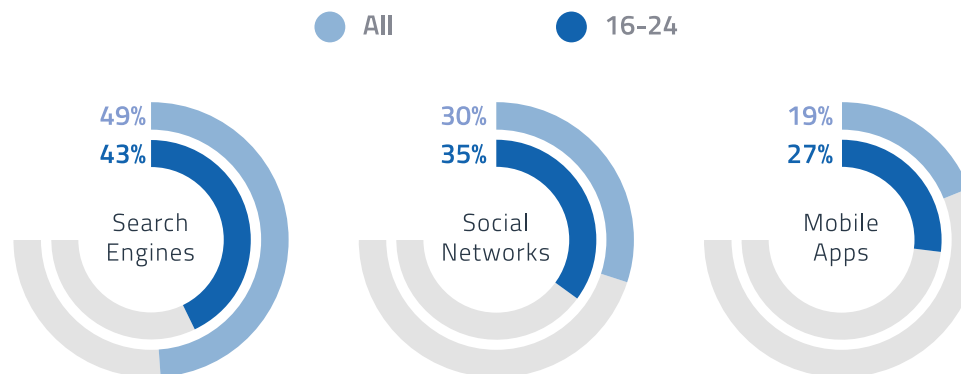
● All   ● 16-24

49% / 43% — Search Engines

30% / 35% — Social Networks

19% / 27% — Mobile Apps

Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?
/// **Base:** Internet Users aged 16-64 /// **Source:** GlobalWebIndex Q2-Q3 2015

Explore this data in PRO Platform /// Click here:
Marketing Implications > Brand Discovery >
Online Research Channels Used

SEARCH ENGINES VS SOCIAL NETWORKS, BY AGE
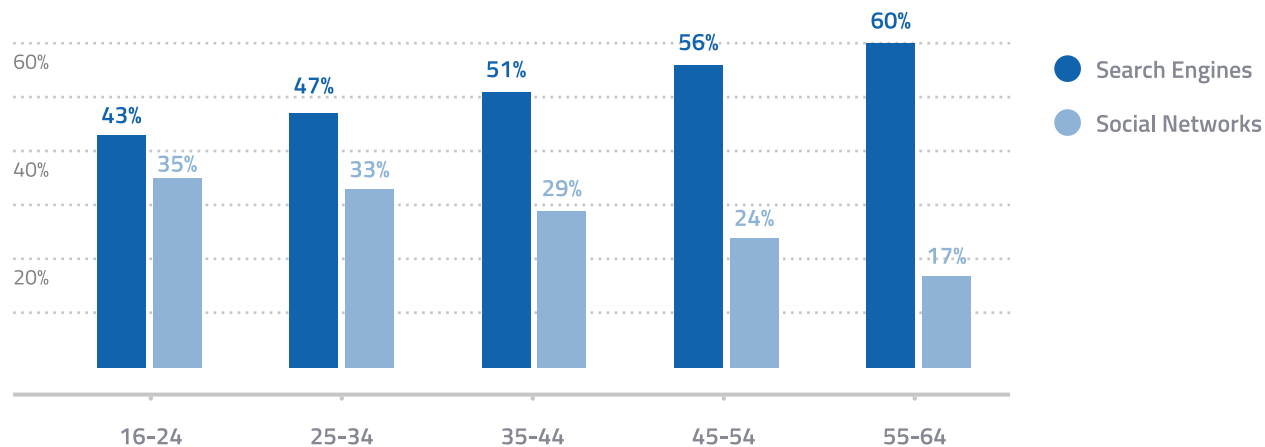
- **Search Engines**
- **Social Networks**

	16-24	25-34	35-44	45-54	55-64
Search Engines	43%	47%	51%	56%	60%
Social Networks	35%	33%	29%	24%	17%

Question: Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? /// **Base:** Internet Users aged 16-64 /// **Source:** GlobalWebIndex Q2-Q3 2015

Explore this data in PRO Platform /// Click here:
**Marketing Implications > Brand Discovery >
Online Research Channels Used**

en search engines yet but it's not hard to see how this trend could evolve over time.

It's here where Facebook has another advantage over its rivals; it doesn't have to rely on previous search histories to know what the user's potential interests or queries could be. Instead, it can draw on the rich behavioral data gleaned through their usage of Facebook itself – meaning it can carry out effective voice searches inside an app which they already use heavily. In fact, Facebook's M is very much in line with how search tools are set to evolve, becoming more intuitive and responsive at the same time as becoming less reliant on AdWords (which have been the powerhouse behind Google search behaviors to date).

So, as Messenger continues its rapid evolution from a simple messaging app into a fully-fledged platform in its own right, it's not hard to see why we could all be talking a lot more about – and to – M.

#4

Where Next for the Sharing Economy?

In the 10s decade, we've seen a number of Sharing Economy companies start to challenge for mainstream status, as well as generate sometimes eye-watering valuations. Taxi-hailing app Uber (founded 2009) is now valued at over $50billion, for example, while Airbnb (also 2009) recently raised investment on a valuation of over $25billion. In India, meanwhile, Ola Cabs has grown from foundation in 2008 to an estimated $5billion valuation and China's ride-sharing app Didi Kuaidi has an estimated value of $16.5billion, despite the fact that the service only launched in 2015 (from a merger of two companies that were established in 2012).

In many cases, the basis for these valuations comes from their potential as much as their success to date. But look at attitudes and behaviors among young groups in particular and it's not hard to see why there's so much room for further expansion. It's now half of 25-34s who say they would rather sign up for a membership to a product/service than pay extra to own it (compared to only 1 in 4 55-64s). And it's 84% of this age group globally who now own a smartphone. Younger consumers have both the mindset and the gadgets that will drive the Sharing Economy further and further into the mainstream. Traditional competitors and local regulators alike might be intent on thwarting progress, but it's clear that the consumer appetite for these services is pronounced – suggesting that counter-innovation rather than stubborn resistance is the best response.

Nevertheless, there are challenges ahead here for the biggest players in the Sharing Economy. At the moment, Uber is perhaps the most well-known of them. In its home market of the USA, it has a healthy lead over rival service Lyft – especially in young and affluent demographic segments – with almost 2.5x as many users. In fact, 7 in 10 US Uber users aged 16-34, 32% come from the top income quartile and users are 75% more likely than the average person to say that they would buy a product/service simply for the experience of being part of the community built around it (52% do), indicating how much the 'cool' factor benefits Uber in this market.

UBER VS ITS COMPETITORS

% who used the following apps last month
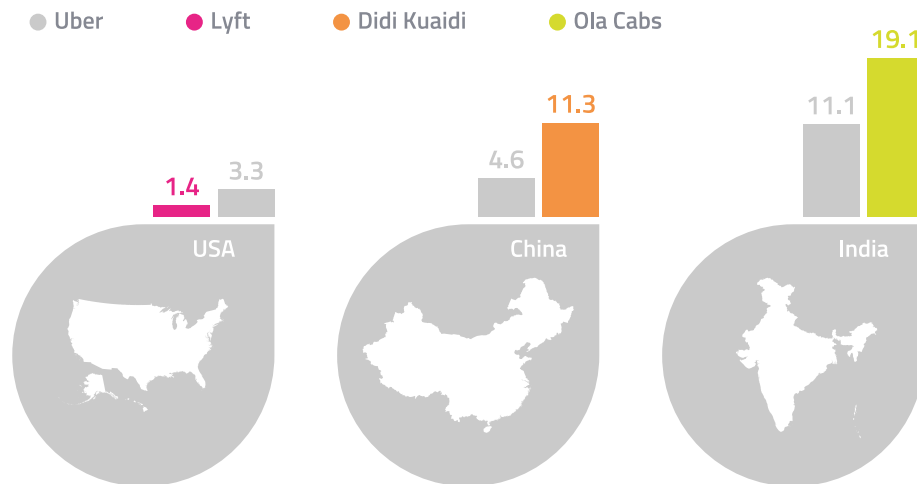
● Uber   ● Lyft   ● Didi Kuaidi   ● Ola Cabs

USA
1.4   3.3

China
4.6   11.3

India
11.1   19.1

Question: Which of the following mobile / tablet applications have you used in the past month? (on any device) /// **Base:** Internet Users aged 16-64 in the USA, China and India /// **Source:** GlobalWebIndex Q2-Q3 2015

Explore this data in PRO Platform /// Click here:
Apps > Specific Applications > Specific Applications Used

But Uber's plans for global dominance won't go unchallenged. The company has faced serious difficulties in its ambitious expansion into China, not least from local authorities. Although Uber does have a presence in this market – last month, about 5% of Chinese internet users say they accessed the Uber app – this pales in comparison to the figures posted by local market leader, Didi Kuaidi. This service can claim that 1 in 8 of China's internet population are using its app each month, rising to 15% among 25-34s. And it's not just in China that Uber has to fear the competition of Didi Kuaidi; in September of 2015, the Chinese service invested in Uber's US rival, Lyft.

It's a similar story in India. Uber may have a respectable presence in urban areas (13% of 25-34s in this market are using the Uber app) but its figures are dwarfed by local service Ola Cabs (which almost a fifth are using). All this begs the question: is Uber too late to the game in India and China, two of the biggest markets in terms of population size? And as the ride-hailing industry grows, will it need to worry about local services like Ola Cabs and Didi Kuaidi (or indeed, these companies themselves) in other fast-growth markets? The expansion and diversification of this marketplace will be a key area to watch.

Another important battleground in the sharing economy revolves around travel accommodation. Travel is among the most popular interests of internet users and over a third are vacationing abroad each year. Services like HomeAway and Chinese site Tujia.com (which has plans to expand outside China) are just two new companies making an impact here.

Faced with a growing number of competitors, the most well-known brand Airbnb will need to work hard to retain its market lead. Currently, 3% of the internet population across GWI's 34 markets are visiting the Airbnb website on a monthly basis. These figures may not seem vast but a travel site can hardly expect the monthly reach of a social network or search engine. And a market like Singapore is a shining example of Airbnb's progress – here, 1 in 8 say they visit the Airbnb website each month. The 7% in Ireland and 6% in Italy who visit each month also represent important successes for the service.

As other accommodation providers enter the fray, Airbnb won't want to rest on its laurels. That's almost certainly one of the reasons behind its 'Business Travel Program', the service's big push towards grabbing a slice of the lucrative business travel market. This might be a step away from its rather non-traditional reputation but the potential benefits are vast: GWI's data shows that some 45% of Airbnb users are taking business trips at least annually (with 1 in 5 doing this at least once a quarter). So, although leisure travel will continue to be the core market for Airbnb and although it will need to work hard to compete with the high level of service that hotels offer business travelers, there is a pretty substantial new user base on the horizon.

Airbnb
% who visited the Airbnb website last month

GLOBAL   **3%**

TOP 10 MARKETS

Singapore	12%	Hong Kong	5%
Ireland	7%	Spain	4%
Italy	6%	Philippines	4%
Malaysia	5%	Indonesia	4%
France	5%	Canada	4%

Question: Which of the following sites/applications have you visited in the past month via your PC/Laptop, Mobile or Tablet? Airbnb /// **Base:** Internet Users aged 16-64 /// **Source:** GlobalWebIndex Q2-Q3 2015

Explore this data in PRO Platform /// Click here: **Cross Device > Web Brand Visitation - Device Split > Web Brand Visited in the Past month on PC, Mobile or Tablet**

LEISURE AND BUSINESS TRAVEL FREQUENCY AMONG AIRBNB VISITORS

● **Vacation in their own country**   ● **Vacation Abroad**   ● **Travel abroad for business**

	At least once a month	Once every 2 or 3 months	Once every 6 months	Once a year	Less often	I don't do this
Vacation in their own country	16%	24%	23%	22%	9%	6%
Vacation Abroad	4%	12%	21%	29%	21%	13%
Travel abroad for business	4%	13%	15%	12%	13%	41%
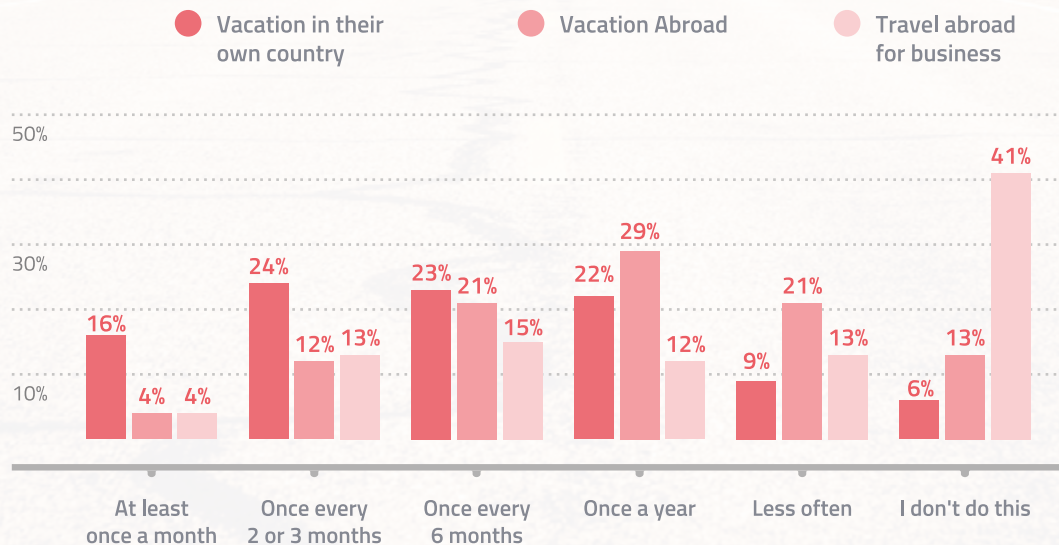
Question: Which of these best describes how often you do each of the following activities? /// **Base:** Airbnb Website Visitors Aged 16-64 /// **Source:** GlobalWebIndex Q2-Q3 2015

Explore this data in PRO Platform /// Click here:
Personal Profiling > Travel > Travel Frequency

In the years ahead, there's little doubt that other sectors will see the disruptive effects of the Sharing Economy. After all, companies such as Travelling Spoon are already linking tourists with home-cooked meals and TaskRabbit is attempting to provide a reliable marketplace for casual labor. Established names are also set to move into other marketplaces; UberRUSH, a delivery service challenging local courier companies, is just one example. And although no Sharing Economy company can expect an easy ride, they can take advantage of the ever-changing online landscape: each year, tens of millions of new internet users are coming online, almost all of them armed with a smartphone, and hence the desire to cut out middle-men or traditional suppliers is likely to grow stronger (just as the ease and immediacy with which this can be done can only increase). Relatively speaking, the Sharing Economy is still a niche proposition at the moment. But you have to wonder for how much longer that will remain the case.

#5

M-Commerce
(finally) Gets Mainstream

To date, the m-commerce revolution hasn't quite taken off in the way that many expected. That's a bit puzzling when you consider that – whether online or in-store – the conditions are now perfect for mobiles to be mainstream commerce devices. For a start, almost all online purchases could now be carried out easily and quickly via a mobile. But just as importantly, with 8 in 10 internet users personally owning a smartphone, the vast majority of internet users could use their mobile to purchase an item online or make their payment at a bricks-and-mortar cash register.

So, why are mobiles yet to reach their true potential as online commerce devices? Why are almost all online shoppers still using PCs/laptops to complete at least some of their monthly purchases, whereas only about 50% are using mobiles? Why are

just 8% of online shoppers using mobiles as their only purchasing device? And how might this change in the year ahead?

The demographics of m-commerce can be pretty revealing here. As you might expect, younger age groups have a notable lead: about a third of 16-34s say they bought a product online last month using a mobile. But that global headline masks some very strong regional differences; while mobile-centric digital consumers in APAC are leading the charge towards m-commerce (37% in this region are mobile shoppers), places like Europe lag behind on just 15%. The influence of online retail giants like Alibaba as well as commerce-friendly apps like WeChat is not hard to see in this.

More than anything, though, this is a story that differs by category. Ask young mobile

ONLINE PURCHASING BY DEVICE
% internet shoppers who have used the following devices to buy a product

PC/Laptop	Mobile	Tablet
88%	46%	21%
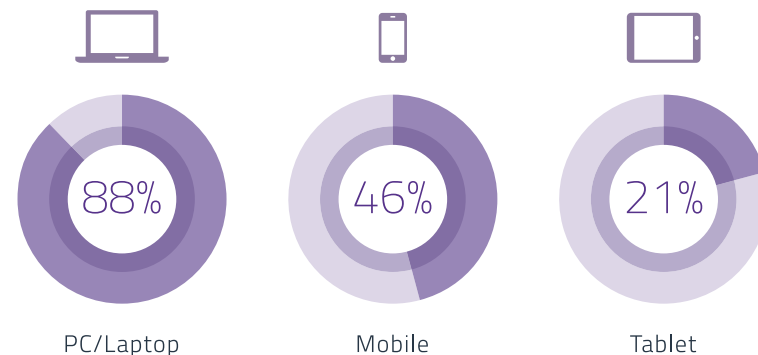
Question: Which of the following activities have you done online on your PC/Laptop, Mobile or Tablet in the past month? Purchased a product online /// **Base:** Online Shoppers aged 16-64 /// **Source:** GlobalWebIndex Q1-Q3 2015

Explore this data in PRO Platform /// Click here:
**Cross Device > Online Activities - Cross Device Split >
Online Activities Done in the Past Month on PC, Mobile or Tablet**

RESEARCHING
PRODUCTS BY DEVICE

BUYING
PRODUCTS BY DEVICE

💻	📱		💻	📱
71%	44%	CAR	71%	36%
59%	63%	MOBILE PHONE	63%	52%
60%	62%	CLOTHES	62%	56%
62%	56%	HOLIDAY/VACATION	63%	46%
56%	60%	GROCERY PRODUCTS	60%	52%
54%	61%	PERFUME/AFTERSHAVE	58%	55%
70%	37%	INSURANCE	70%	37%

% who would use the following devices to research these products

% who would use the following devices to buy these products

Question: Which of these devices would you use to research the following products? And which of these devices would you use to buy the following products? /// **Base:** Mobile internet users aged 16-34 in Brazil, India, Italy, Malaysia, UK and USA /// **Source:** GlobalWebIndex Q3 2015

users which devices they would consider using to research or buy certain products and the results fluctuate. If we start with product research, younger demographics are more likely to turn to their smartphones rather than their PCs/laptops in order to investigate items which are of low or medium value – e.g. mobiles, clothes, groceries and perfume. In contrast, PCs/laptops remain the favored devices for bigger-ticket or more complex purchases, with notable gaps recorded for things such as cars and insurance. So, mobiles are now the favored research device for some but certainly not all items.

Ask the same demographic about which devices they would use to purchase, rather than research, these items and a rather different picture emerges. Now, PCs/laptops are in the lead across all categories. What's more, while PCs maintain fairly equal figures for both research and purchase, mobiles see a fairly consistent drop when it comes to the very end of the purchase journey. Put another way, people might turn to either device when it comes to product research but remain more wedded to traditional devices when it comes to completing their transaction.

Important in all this is that it's smaller or lower-value items which score the best figures on mobile. Clearly, it's these cat-

egories which are going to lead the charge towards m-commerce breaking into the mainstream, and it's in this context that we should be monitoring the progress of services like Google Wallet, Samsung Pay and Apple Pay. Considering that well over a third of internet users say a quick-and-easy checkout would motivate them to complete a purchase, and that mobile payments are so far concentrating on transactions for low-value amounts of money, it's these services which are likely to "normalize" the idea of m-commerce and mobile payments.

A promising sign here is that engagement and interest levels among key target groups are pretty high. If we take iPhone 6 or Apple Watch users in the UK and USA, for example, it's already 4 in 10 who say they've used Apple Pay. A further 3 in 10 say they are interested in doing this in the future. So, a mighty 70% of the potential audience for this feature have used it already or would consider doing so in the future. And the smart money would be on these numbers increasing over the next 12 months. Just as 2014-2015 saw us looking at mobile messaging services to see which name would become the leading player, so 2016 is the year to watch which name(s) manage to become the dominant players in mobile payments.

ENGAGEMENT WITH APPLE PAY
IN THE UK & USA

39%

Yes, I have used Apple Pay

30%

No, I have not used Apple Pay and am not interested in doing so in the future

31%

No, I have not used Apple Pay but am interested in doing so in the future

 Pay

% of iPhone 6/6Plus and Apple Watch Owners who have used or are interested in Apple Pay
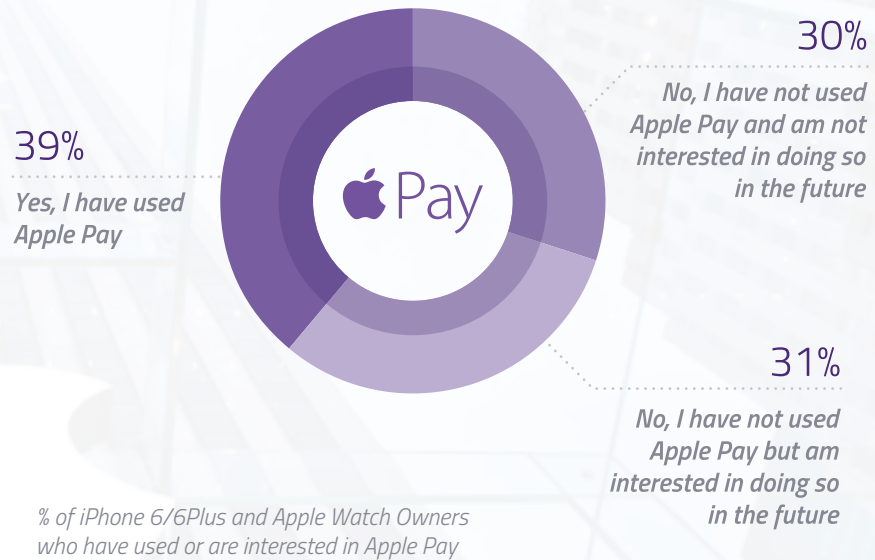
Of course, there are still other barriers to overcome. It's one thing to convince a consumer to pay for a drink or a snack with their mobile; it's quite another for them to purchase a new TV via the same device. And, whether perceived or real, long-standing issues surrounding the security and function-ality of mobile transactions still need addressing. Even so, it's hard to avoid the fact that nearly a fifth of online adults globally have an iPhone and almost a third have a Samsung, indicating just how much potential there is for lower-end m-commerce activities to (finally) enter the mainstream.

Explore this data in PRO Platform /// Click here:
Mobile > Apple Pay > Apple Pay Usage

Ad-Blocking is a young person's game, but not for long

Several privacy-related behaviors have come to prominence in recent years as consumers have looked to exercise greater control over their personal data and digital footprints. Currently, the most common tactic is to use a private browsing window (44% did this last month). However, a not insignificant 39% are deleting cookies in order to prevent websites from remembering them and, by association, to stop ads and other content from being personalized and specifically targeted at them.

Question: Which of the following things apply to you when you access the internet from your main computer? Have done in the last month /// **Base:** Internet Users aged 16-64 /// **Source:** GlobalWebIndex Q1-Q3 2015

Explore this data in PRO Platform /// Click here:
Internet Landscape > Access Points > Online Privacy Measures

ONLINE PRIVACY MEASURES BY AGE
% in each group who did the following last month on their main computer

16 - 24
37%
33%

25 - 34
31%
42%

35 - 44
24%
39%

45 - 54
21%
38%

55 - 64
34%
17%

10 20 30 40 50

- Deleted Cookies
- Used an Ad-Blocker

ONLINE PRIVACY MEASURES
% who did the following on their main computer last month

44%	39%	28%	14%
Used a Private Browsing Window	Deleted Cookies	Used an Ad-Blocker	Used Anti-Tracking Service
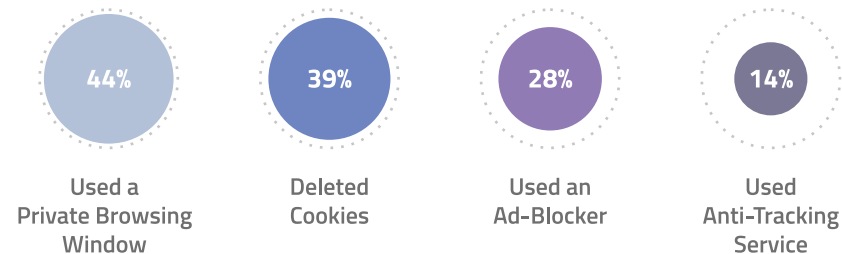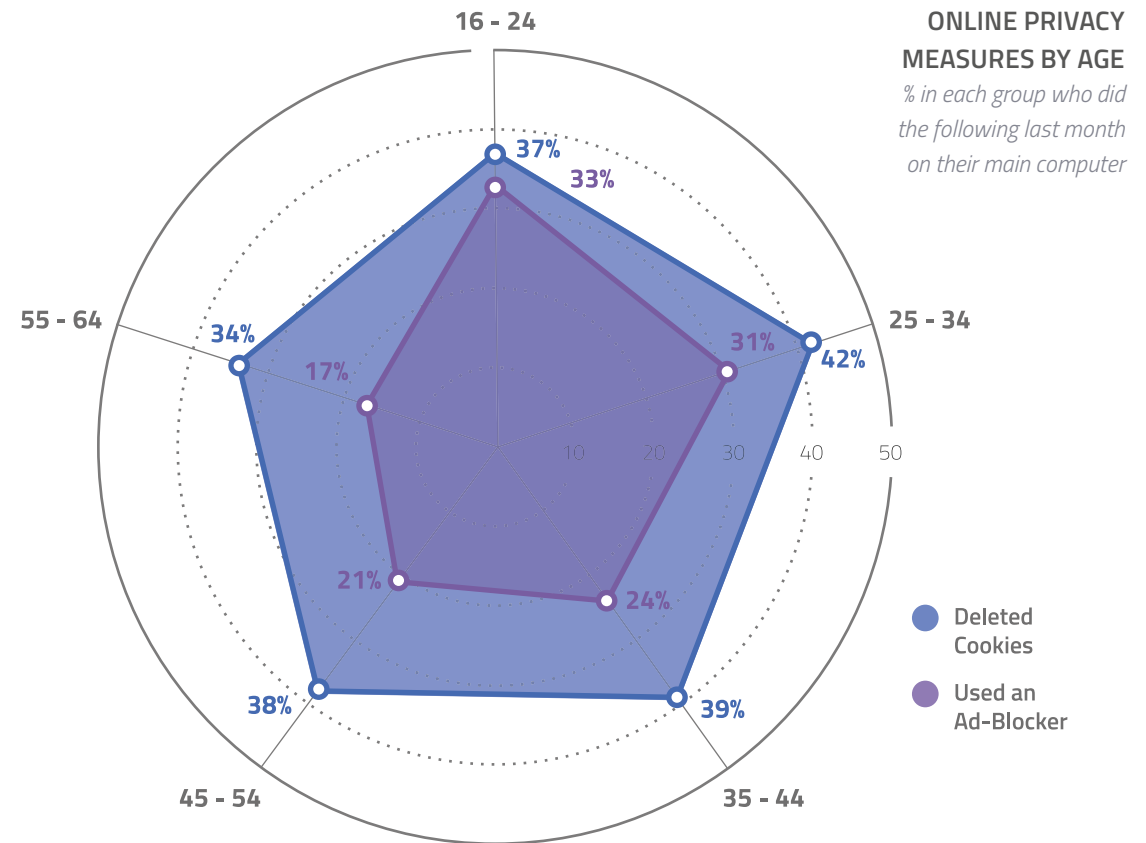
With ad-blocking much in the news at the moment, it's worth noting that it's still just 28% of online adults who say they deploy one of these tools on a monthly basis. Now that Apple is allowing iOS users to adopt a similar approach on their smartphones, though, this is a number which will inevitably creep upwards.

From an industry perspective, the arrival of ad-blocking capabilities on mobile platforms has been a worrying and wholly unwelcome development. After all, ads ultimately fund much of the free content that people are accustomed to enjoying across the internet and, year-on-year, GWI's

data shows that the amount of time being spent online on mobiles continues to rocket. In fact, 2015 is the first year where the typical internet user is online on their smartphone for an average of more than 2 hours per day. That the equivalent figure back in 2012 was just 1.25 hours per day underlines how quickly mobiles are coming to dominate internet behaviors, especially as usage is so much higher among the youngest age groups (across the 34 countries that we survey, 16-24s are now spending over 3.25 hours per day online on their mobiles).

These trends cause an obvious tension: people are doing more and more on their smartphones but it's going to get ever easier for them to disrupt the revenue models that have traditionally funded many of these activities. And although the creator of Peace – one of the most high-profile mobile ad-blockers – decided to withdraw the app shortly after its release on moral grounds, can we really expect mobile users to have their conscience troubled in a similar way?

At the moment, the picture varies significantly by age. The heaviest consumers of the internet, the 16-24s, are at the very forefront of the trend with over a third of them already blocking ads. That dips to just 17% among the oldest group within our research, the 55-64s.

Interestingly, younger consumers are the least concerned about online privacy and data usage. Ask them if they are worried about how companies are using their data or if they prefer to be anonymous when using the internet and they very consistently post the lowest figures in our research. For today's teens and twenty-somethings, ad-blocking is less about privacy and more about improving their online experience; quite simply, they're online for the most amount of time each day and so are the most keen to use simple tools to give them an ad-free landscape. It's not just that mobile

CONCERN OVER DATA
% who worry about how companies are using their personal data

59%	62%	62%	65%	66%
16 - 24	**25 - 34**	**35 - 44**	**45 - 54**	**55 - 64**

Question: To what extent do you agree/disagree with the following statement? I worry about how my personal data is being used by companies ///
Base: Internet Users aged 16-64 /// **Source:** GlobalWebIndex Q1-Q3 2015

Explore this data in PRO Platform /// Click here:
Personal Profiling > Attitudes & Lifestyle > Self-Perceptions

ads are a drain on battery life and data allowances, it's that many of them are barely optimized for smartphones and so can be even more intrusive and irksome than those seen on PCs or laptops.

At the other end of the age spectrum, we have the paradox that older consumers are the most concerned about their privacy but the least likely to be blocking ads as a result. But that's surely a symptom of awareness; currently, older groups are the least likely to know what ad-blockers are. As such tools become more mainstream, there can be little doubt that usage levels will creep upwards and show fewer variations by age. It's certainly telling that 55-64s are already just as likely as 16-24s to be deleting cookies on a regular basis, an action which is rather more established and well-known among internet users. Equally revealing is that

older groups are the least likely to want to see personalized recommendations or ads based on their browsing histories or previous purchases, the fodder on which so many of today's ads are based.

In light of these trends, trying to resist the spread of ad-blocking feels rather futile. It's akin to the complaints that traditional suppliers in other sectors have been leveling at disruptor services such as Uber and Airbnb; rather than hoping that the problem will disappear and that consumers will suddenly become ultra-moral or self-aware, we need to recognize that the game has changed. With our research showing that smartphone owners (and those with an iPhone 6 in particular) are already ahead of average for using ad-blockers, this trend is here to stay. That means native content is one obvious solution; with as many as 40% of

young mobile users saying that they are watching branded videos more frequently than they were a year ago, advertising is going to have to get a lot more creative – and entertaining – if it wants to keep up with evolutions in consumer behaviors.

#7

Waiting for the Wearable Revolution

Apple has a proven track record of entering already-established marketplaces and building up serious dominance. And with GWI's data showing that close to 50% of smartwatch owners in the US and UK have opted for an Apple Watch, this seems to be a case of history repeating itself.

However, there's still a big problem here. Apple might have become a leading name among the pool of smartwatch owners, but it's a pool which remains very small. Months after the launch of Apple's high-profile and long-awaited wearable, it's clear that this sector remains anything but mainstream. The Apple Watch and other new releases might have given us a glimpse of how ultra-convenient the smartwatches of the future are likely to be, but they have failed to become must-have devices. Quite simply, most consumers are yet to be convinced that they need a wearable.

Question: Which of the following devices do you personally own? /// **Base:** Internet Users aged 16-64 /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here:
Internet Landscape > Access Points > Device Ownership

DEVICE OWNERSHIP
% who say they personally own the following

89%	**80%**	**44%**	**34%**	**32%**
PC / LAPTOP	SMARTPHONE	TABLET	GAMES CONSOLE	SMART TV

29%	**16%**	**13%**	**9%**	**9%**	**1%**
MOBILE/ CELLPHONE (Not a smartphone)	E-READER	TV STREAMING STICK / DEVICE	SMART WRISTBAND	SMARTWATCH	NONE OF THE ABOVE

WEARABLE OWNERSHIP BY REGION
% in each region who own the following

Europe
4%
5%

North America
8%
10%

● Smartwatch
● Smart Wristband

APAC
12%
10%

MENA
8%
7%

LatAm
7%
5%

WEARABLE OWNERSHIP BY MARKET
% in each market who own the following

20%
10%

India, UAE, China, Hong Kong, Thailand, Vietnam, Taiwan, Indonesia, Saudi Arabia, Turkey, Singapore, Malaysia, South Korea, USA, Mexico, Philippines, Brazil

10%

Spain, Australia, Italy, Poland, South Africa, Sweden, UK, Netherlands, Germany, Canada, Portugal, France, Ireland, Argentina, Belgium, Russia, Japan
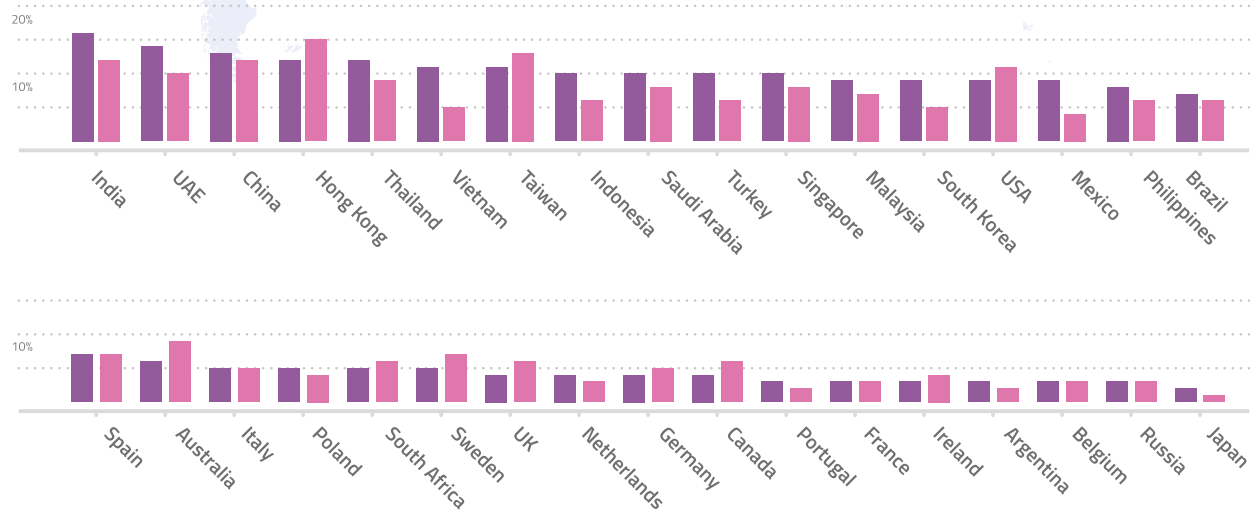
Globally, it's now almost 10% who say they have a smartwatch (with smart wristbands posting a similar figure). Compare that to the 44% who have a tablet, the 1 in 3 who have a smart TV or the 13% who have a TV streaming device and it's clear how much ground wearables still need to cover. Certainly, a figure of nearly 10% might sound decent for a device still in its nascent stages; after all, the other devices tracked in our chart have been around for much longer periods of time. However, there are some important caveats to note here. Firstly, smartwatch ownership is lower in many key developed markets like the UK (4%), Australia (6%), Canada (4%) and Japan (2%).

That means the global figure is being driven largely by higher ownership rates in many Asian markets – with countries like Hong Kong, Singapore, China and India all posting numbers of 10%+. The fact that their internet populations tend to be young is one reason for this, but so is that fact that the smartwatch market has been flooded by low-end options which cost as little as 20 USD.

If we take China as an example, a site like Taobao now has a huge range of smartwatches available, and at all sorts of price-points. The Ticwatch by Mobvoi is just one of the latest editions to enter the market,

while Xiaomi has made smart wristbands more accessible via its cheap fitness bands. So too does China have its own – much more affordable – take on Google Glass in the form of Cool Glass One. What's more, the price-points of branded smartwatches on certain commerce sites across APAC suggest there's another factor at work as well: it would appear that not all branded owners have genuine articles. So, we're not looking at a situation where all of today's smartwatch owners have premium devices like the Apple Watch. And that means the global progress to date for high-end smartwatches has not been as solid as the headline figure might suggest.

The demographics of ownership give an-other cause for concern. Currently, it's younger age groups who are in the lead for smartwatches, with the strongest fig-ures of all seen for 25-34s (a group with a developed interest in tech as well as the disposable income necessary to make purchases). In contrast, 16-24s might be at the absolute forefront of smartphone usage but many are finding themselves priced out of the smartwatch market. This expense factor becomes particularly clear if we examine ownership by income: the top quartile are over twice as likely as the lower one to have invested in a smart-watch.

THE DEMOGRAPHICS OF WEARABLES
% in each group who own the following
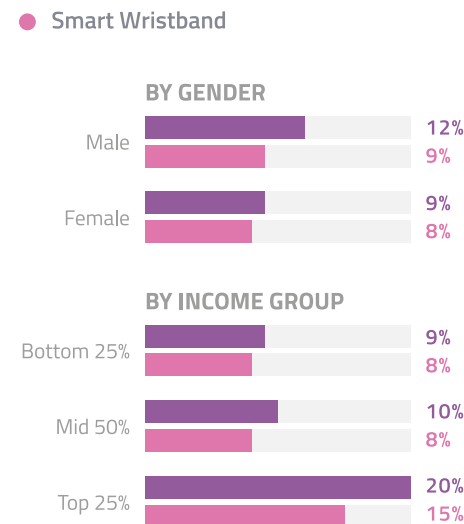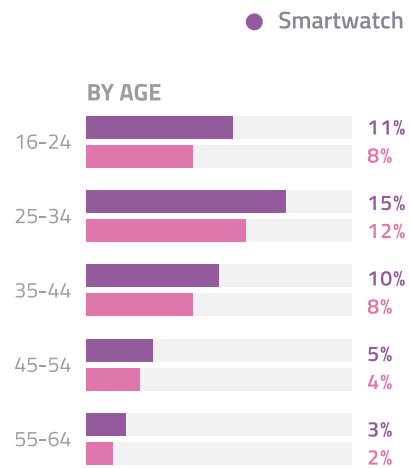
● Smartwatch   ● Smart Wristband

BY AGE

16-24   11%
         8%

25-34   15%
         12%

35-44   10%
         8%

45-54   5%
         4%

55-64   3%
         2%

BY GENDER

Male   12%
         9%

Female   9%
         8%

BY INCOME GROUP

Bottom 25%   9%
              8%

Mid 50%   10%
              8%

Top 25%   20%
              15%

Question: Which of the following devic-es do you personally own? // **Base:** Internet Users aged 16-64 // **Source:** GlobalWebIn-dex Q3 2015

Explore this data in PRO Platform /// Click here: **Internet Landscape > Access Points > Device Ownership**

It's these demographic trends which give the clearest sign of why smartwatches are likely to remain a relatively niche possession for some time to come. Rewind the clock to late 2012 and the situation for tablet usage offers a useful comparison. Three years ago, we were seeing some similar patterns for tablets as we're now recording for smartwatches. Specifically, the cash-rich 25-34s were in the lead and the top income quartile was ahead of the lower one. Nevertheless, there are some clear differences too. Back in 2012, the top income group was more than 3x as likely to be using a tablet as the lower one; for smartwatches in 2015, they are only 2x as

likely, suggesting that smartwatches haven't enthused wealthier groups in quite the same way.

Also, while both tablets and smartwatches have low figures among cash-poor 16-24s, tablets managed to establish serious appeal among older age groups. As 2015 draws to a close, that means 55-64s are in fact more likely to own a tablet than 16-24s. Critically, though, we were already seeing the start of this trend back in 2012, when 45-54s were only just behind the youngest group for tablet usage. Fast-forward to 2015 and the current situation for smartwatches is poles apart from this: 45-

64s are barely engaging with smartwatches. Even if we allow for the fact that older consumers are traditionally late to adopt new tech, the figures remain remarkably low. The core problem for smartwatches is that their most natural user-base – the 16-24s – are exceptionally heavy smartphones users and either can't afford or simply don't want a smartwatch.

Of course, 2016 will bring some progress. There's a new version of the Apple Watch on the horizon, which will tempt some existing users to upgrade and bring others into the market for the first time. The advice from many to wait for the second

edition of such a groundbreaking device might well lead to a small spike, as will the fact that many of those who upgrade will sell their existing devices on the secondary market. Worth noting too is that competitors are upping their game, with the latest release from Huawei arguably being one of the most stylish smartwatches to date.

There's also the intriguing prospect of a second-edition Google Glass device. Although v1 failed to make the impact that some had hoped, it was still 1 in 4 internet users in the UK and US who said they were interested in using Google Glass in early 2015 (interestingly, making it more sought

PROSPECTS FOR THE NEW GOOGLE GLASS

% in the UK and US who said the following about Google Glass in 2015

11%

Strongly interested in
using this in the future

45%

Not interested in
using in the future

16%

Quite interested in
using this in the future

28%

I'm not sure what this is
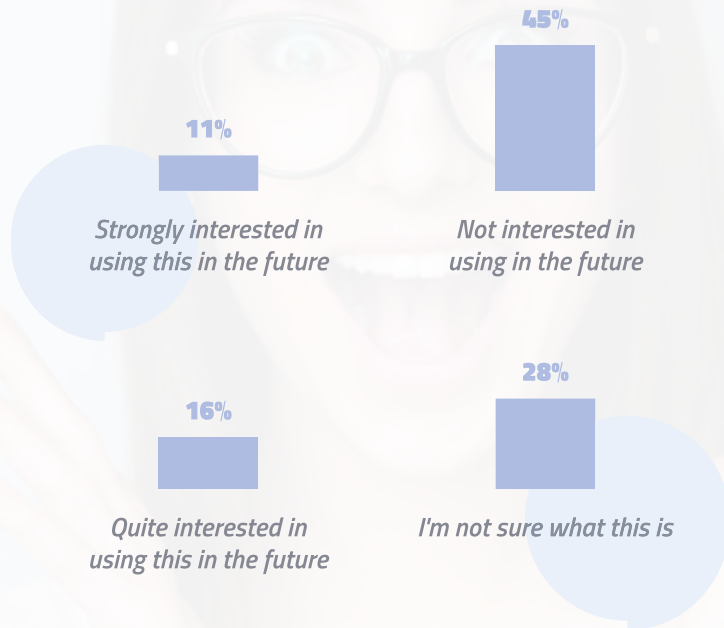
Question: Which of the following services, features or devices are you interested in using in the future? /// **Base:** Internet users aged 16-64 in the UK and USA /// **Source:** GlobalWebIndex Q1 2015

Explore this data in PRO Platform /// Click here:
Internet Landscape > Interest in New Services and Devices

after than the Apple Watch). With a refined and less-expensive model in the pipeline, this could generate another small boost in terms of engagement with wearables.

The entrance of Apple into the wearable tech market this year effectively altered its landscape, and some would say it kick-started its revolution. But don't expect this revolution to gather too much pace in 2016. Yes, we'll see the ownership figures rise. And yes, smartwatches will continue to get better and better. But until they start doing lots of things in superior ways to smartphones, they will struggle to move beyond their niche status.

#8

From Cookies to Commerce:
The Next Step for Social Media

For many social networks, ad revenues have long been at the core of their impressive quarterly revenues. But this situation is facing a threat: many of today's increasingly tech- and privacy-savvy internet users now know how to combat the tactics that make platforms like Facebook billions of dollars. By using ad-blocking tools, regularly deleting cookies or using anti-tracking software, networkers can seriously disrupt traditional advertising strategies.

Social networkers are typically ahead of average when it comes to managing their digital footprints, with as many as 4 in 10 Facebookers and almost 1 in 2 Redditors saying they delete cookies each month in order to prevent websites from remembering them. Elsewhere, 31% of Facebookers say they use ad-blocking software on their main computer, with figures even higher among Redditors and Instagrammers.

ONLINE PRIVACY MEASURES
AMONG SOCIAL NETWORKERS
% of active users who did the following last month
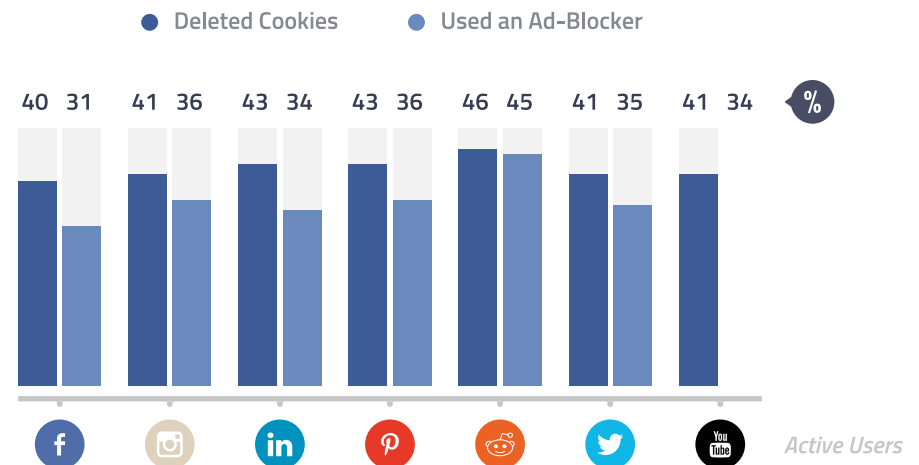
● Deleted Cookies   ● Used an Ad-Blocker

	f	instagram	linkedin	pinterest	reddit	twitter	youtube
Deleted Cookies	40	41	43	43	46	41	41
Used an Ad-Blocker	31	36	34	36	45	35	34

%

Active Users

Question: Which of the following things apply to you when you access the internet from your main computer? /// **Base:** Active Users of these platforms aged 16-64 /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here:
Internet Landscape > Access Points > Online Privacy Measures

64

Naturally, some social networks will be impacted by this much more heavily than others. After all, disable ads on Facebook and it can still show you a range of commercial posts based on what other users have liked (or are voluntarily sharing on their newsfeeds). What's more, most networks will have behavioral data as well as at least some self-reported demographic stats which they can draw on to push relevant native content. Also worth noting here is that the majority of active users on all major networks are *not* yet blocking ads or deleting cookies.

For some services, native content is one solution to all this – something we cover in the next trend in this report – but social commerce is another avenue that could open up a highly lucrative future revenue stream for the major networks.

There's no doubting that social media already acts as an important consumer touch-point for brands. Globally, over a third of internet users say they are "following" their favorite brands on social media and almost as many say they use social networks in order to research products. But while networkers are comfortable using social platforms as part of their purchase journey, the desire to complete transactions on these sites is much less pronounced. In fact, just 11% of internet users say that being able to buy directly through a social network would encourage them to purchase a product – putting the "buy button" at the bottom of the 14 purchase drivers tracked by GWI.

Certainly, some social networkers show more enthusiasm for "buy buttons" than others. At the front of the pack here are Snapchatters, 22% of whom see the appeal of social commerce. Interestingly, that puts them ahead of even WeChatters, a group of users who are much more used to the proposition of social commerce (APAC-based social networks and messaging apps have led the way here to date in terms of integrating commerce options into their platforms).

PROSPECTS FOR SOCIAL COMMERCE
% of internet users who...
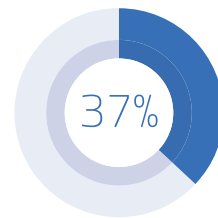
37% Follow Favorite Brands on Social Media
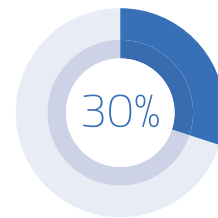
30% Use Social Networks to Research Products
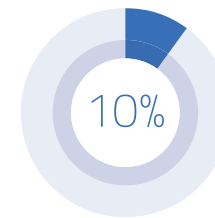
10% Say a Buy Button on a Social Network Would Make Them More Likely to Purchase a Product

Question: Which of the following types of people or organizations do you prefer to follow online via social media services? // Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? // When shopping online, which of the following things are most likely to increase your likelihood of buying a product? /// **Base:** Internet Users Aged 16-64 /// **Source:** GlobalWebIndex Q2-Q3 2015

Explore this data in PRO Platform /// Click here:
Marketing Implications > Brand Discovery > Online Research Channels Used

In contrast, Facebookers are rather less engaged (a direct result of Facebook having the broadest age profile in terms of its user base). But as it also has the biggest global audience, even a relatively small percentage could still translate to it having the largest number of potential social commerce engagers. What's more, with 2015 seeing Instagram, Twitter, Facebook and others all experimenting with social commerce options, it's clear that 2016 is the year where we'll see far more emphasis being placed on converting potential into reality. With names like WeChat and LINE having pushed social commerce into the mainstream in many parts of Asia, the battle to achieve the same in other world regions will be contested fiercely.

Question: When shopping online, which of the following things are most likely to increase your likelihood of buying a product? // **Base:** Active Users of these platforms aged 16-64, exc. China // **Source:** GlobalWebIndex Q2 2015

Explore this data in PRO Platform /// Click here: **Marketing Implications > Brand Activation > Motivation to Drive Purchase Consideration**

THE POTENTIAL OF SOCIAL COMMERCE
% who say a 'buy button' on a social network would motivate them to purchase

Snapchatters	Sina Weibo Users	WeChatters	Instagrammers	Pinterest Users	LinkedIn Active Users	Facebook Messenger Users	Twitter Users	YouTubers	Google+ Users	Facebook Users
22%	20%	19%	17%	16%	16%	15%	15%	13%	11%	11%

#9

The Rise of Live-Streaming

It's hard to escape the buzz surrounding Meerkat and Periscope at the moment, especially since the ever-influential Taylor Swift started taking action to prevent fans using the apps to broadcast her concerts from inside venues. Just ask Apple about the impact she can have on a service's name recognition.

Currently, though, it's only a tiny minority of consumers who are using these live-streaming apps; according to GWI's Q3 2015 data, about 1.5% globally are engaging with Meerkat and just under 2% are using Periscope. Numbers remain low in all of the 34 markets we survey and, while both apps have seen growth from around 1% in Q2 2015, it's hardly the type of dramatic increase that we might expect given the high-profile coverage that they have been receiving.

In light of this, we might well ask why brands are falling over themselves to have a presence on the live-streaming apps, and why many are touting them as the future of how consumers will engage with companies online. Well, dig a little deeper into the numbers and the potential of these apps is not hard to see.

TOP FACEBOOK ACTIONS

% of active Facebook users who did the following last month

|		
👍	Clicked the "like" button	66%
▶	Watched a video	51%
💬	Messaged a friend on a 1-to-1 basis	50%
💬	Commented on a friend's photo or video	48%
📰	Read a news story	47%
📄	Read an article	47%
f	Logged in to see what is happening without posting/commenting on anything	44%
💬	Commented on a friend's profile status	44%
🖼	Uploaded and shared my own photos	37%
💬	Updated my profile status	34%

Question: Thinking about when you use Facebook, can you please tell us if you have done any of the following within the last month? /// **Base:** Facebook Active Users aged 16-64, exc. China /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here: **Social Media > Social Platform Past Month Activities > Facebook Actions**

LIVE-STREAMING APPS
AND THE MAJOR SOCIAL NETWORKS
% of Meerkat and Periscope users who have accounts on...
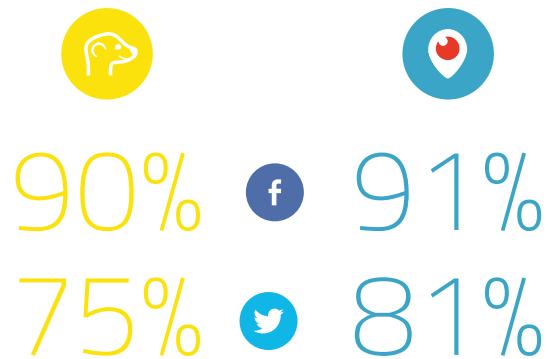
90% **f** 91%

75% **t** 81%

Explore this data in PRO Platform /// Click here: **Social Media >
Social Platforms > Account Ownership/Membership**

On a site like Facebook, watching a video is one of the most popular activities. Each month, over half of the site's active users say they are doing this – putting it some distance behind clicking the "like" button but making it more common than uploading photos or posting a status update. It's a major trend on Twitter too, where over a quarter of the micro-blog's active users are now watching videos.
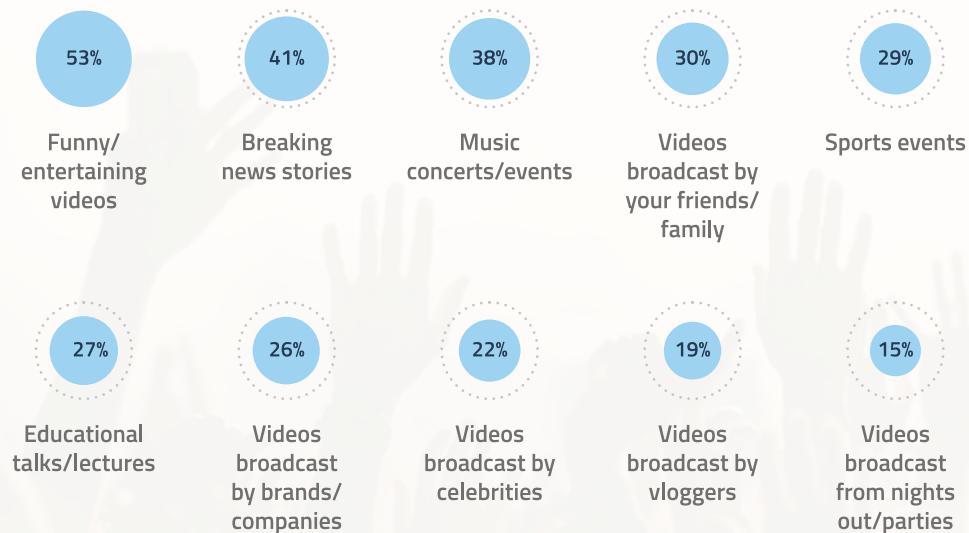
But it's the crossover between the giants of the social networking world and these new apps which is particularly striking: our data shows that the vast majority of Meerkat and Periscope users have accounts on Facebook and Twitter, and that virtually all of them have a presence on at least one of them. Clearly, then, Meerkat and Periscope users are getting something from the specialist apps not currently offered by the more established networks and it makes complete sense that both networks should be investing so much time and effort into integrating live streaming inside their newsfeeds.

The arrival of ad-blocking on mobile is particularly relevant here. That surely sounds the eventual death-knell for the mobile banner ad and, while in-app advertising remains out-of-reach of most mobile ad-blockers for now at least, the smart money is on native advertising on mobile becoming more and more important in the years ahead.

In this context, the future importance of live-streaming for brands is obvious. As advertising-weary consumers take steps to prevent their web experience from being interrupted, we'll undoubtedly see more emphasis on less overt forms of advertising where the consumer experience moves far beyond simply hearing about a brand or its latest product.

INTEREST IN LIVE-STREAMING EVENTS

% who would be interested in watching the following via live-streaming apps

53%	**41%**	**38%**	**30%**	**29%**
Funny/ entertaining videos	Breaking news stories	Music concerts/events	Videos broadcast by your friends/ family	Sports events

27%	**26%**	**22%**	**19%**	**15%**
Educational talks/lectures	Videos broadcast by brands/ companies	Videos broadcast by celebrities	Videos broadcast by vloggers	Videos broadcast from nights out/parties

Question: Many social networks and apps have been introducing live video streaming features. This allows their users to use their mobile phones in order to broadcast live videos from any location. Which of the following types of live video broadcasts would you be most interested in watching? /// **Base:** Mobile internet users aged 16-34 in Brazil, India, Italy, Malaysia, UK and USA /// **Source:** GlobalWebIndex Q3 2015

Look specifically at young mobile users at the moment and 40% of them say they are watching native forms of video on their smartphone more frequently than they were a year ago. And their preferences when it comes to live broadcasts offer fertile ground for brands. Most popular of all are broadcasts of funny/entertaining content, which over half of mobile users aged 16-34 say they are interested in watching. Following behind are live broadcasts of breaking news stories on just over 40% and music concerts on 38% (sorry Taylor). Smaller but still important groups express interest in watching videos broadcast by brands (26%), celebrities (21%) or vloggers (19%).

It's among these audiences in particular that brands could hope to carve out an important presence on smartphones despite the inevitable rise of mobile ad-blockers. The numbers might be relatively modest at the moment but they do represent a point of refuge amidst the growing anti-advertising tide. And would it really be such a bad thing if the industry is forced to get better at native creative on mobile in preference to traditional forms of advertising which simply haven't evolved well enough to find their place on mobile? Meerkat and Periscope might be highly niche names at the moment, but not for long.

#10

Connecting India

India's 1.25 billion strong population is relatively young, increasingly brand-hungry and, most importantly, largely unconnected to the internet. Of the 34 countries tracked by GWI, it has one of the very lowest internet penetration rates, with the figure still stuck below the 20% mark.

Inevitably, this vast swathe of unconnected individuals is gathering considerable interest – not least from Mark Zuckerberg. India is already a major market for the service, with over 9 in 10 internet users having an account. But with Facebook penetration having reached saturation point in most mature markets, countries like India are now a top target for a network which needs to keep reporting quarter-on-quarter increases in user numbers. While there are few individuals left to convert into new users in places like the USA, a market like

India offers tens, if not hundreds, of millions of potential new Facebookers in the years ahead. Indeed, if digital patterns remain on their current trajectory, the vast majority of new internet users in India are set to join Facebook. Little wonder that Mark Zuckerberg went to the trouble of visiting the country himself, then.
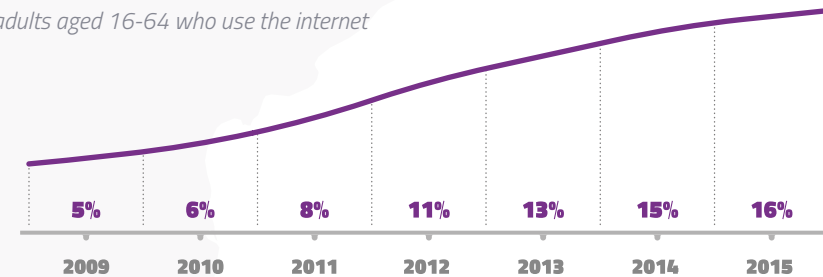
Question: In the past month, from which of the following devices have you accessed the internet either through a web browser or an application? /// **Base:** Indian Internet Users Aged 16-64 /// **Source:** GlobalWebIndex Q2 2012 - Q3 2015

Explore this data in PRO Platform ///
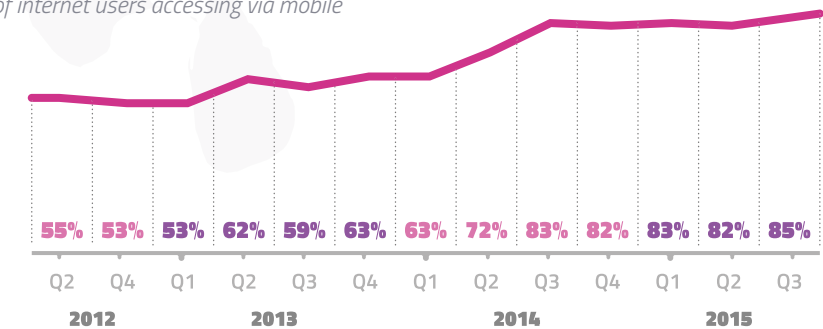Click here: **Internet Landscape > Access Points > Internet Device Access**

INDIAN INTERNET PENETRATION
*% adults aged 16-64 who use the internet*

2009	2010	2011	2012	2013	2014	2015
5%	6%	8%	11%	13%	15%	16%

INDIAN MOBILE INTERNET ACCESS
% of internet users accessing via mobile

2012		2013				2014				2015		
Q2	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
55%	53%	53%	62%	59%	63%	63%	72%	83%	82%	83%	82%	85%

While China remains by far the biggest country overall – whether in terms of current or future numbers of internet users – India benefits from the fact that global services are not subject to the same type of government censorship that they face in China. And while home-grown names like Flipkart, Snapdeal, Hike Messenger and Ola Cabs have all resonated strongly with Indian internet users, the country doesn't have an ecosystem dominated by domestic tech players in the same way that WeChat, Sina Weibo, Alibaba, Baidu et al rule over China. Indian internet users are as receptive to global brands as they are to those based in India itself. The opportunity for quick and relatively easy expansion here is just so much bigger than it is in China.

DEVICE SHARING

% of Indian users who share their mobile with others

10%
7%
11%
10%
62%

MOBILE OWNERSHIP IN INDIA
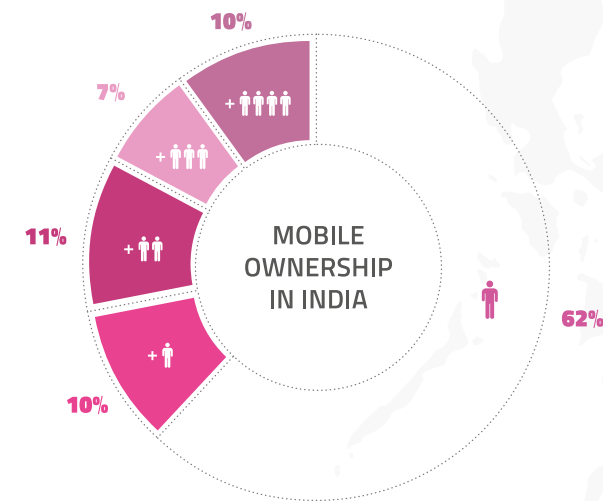
○ **I am the only person who uses this**

● **1 other person uses it**   ● **2 other people use it**

● **3 other people use it**   ● **4+ other people use it**

Question: Thinking about the devices you use to access the internet, can you please tell us how many, if any, other people use each device? /// **Base:** Mobile Internet Users aged 16-64 in India /// **Source:** GlobalWebIndex Q1-Q3 2015
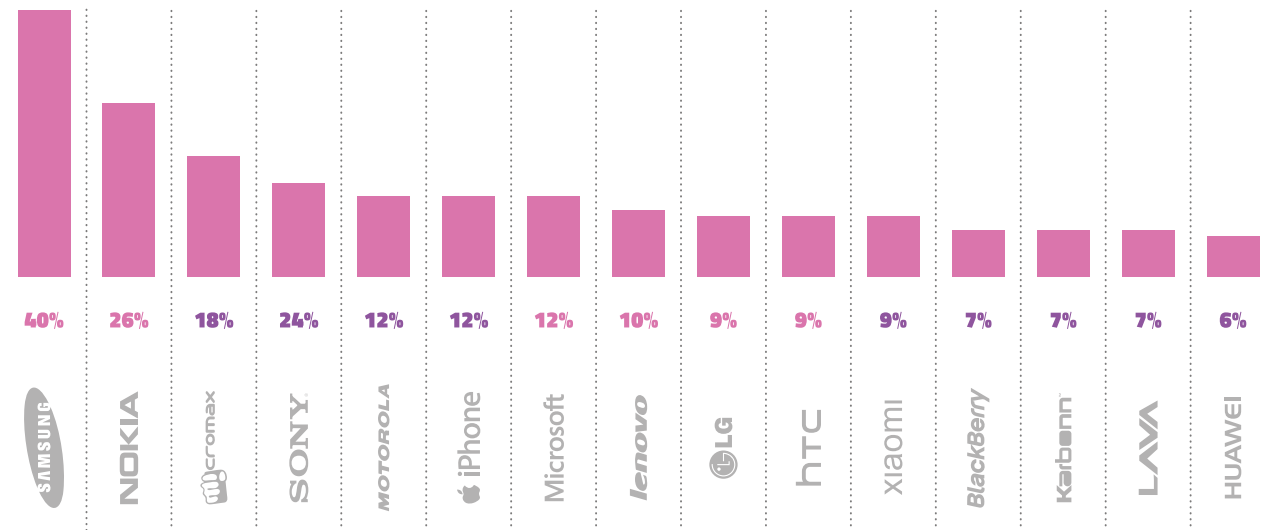
Explore this data in PRO Platform /// Click here: **Internet Landscape > Access Points > Device Sharing**

Unsurprisingly, it's mobile which is the metric to watch in India; 85% of India's digital population are now accessing the internet via these devices, a figure which has increased by 30 percentage points since Q2 2012. Over the same period, internet access via PCs/laptops remained relatively stable, with a slight drop of 3 percentage points. But there are two particularly important facets to this. Firstly, the average time devoted to mobile each day has more than doubled since 2012, jumping from about 1.5 hours to cross the 3 hour per day mark in 2015. Secondly, 40% of mobile web users say they share their handset with someone else; that makes mobile sharing a more pronounced trend in India than in almost any other market tracked by GWI. The vast majority of these additional users will be hidden from passive analytics, but mobiles are their major gateway to getting online.

Particularly striking is the rate of mobile internet growth among India's rural population. Since 2012, the number of internet users in rural areas who say they connect via phones has almost doubled from 43% to 81%. Look at the country's current composition and it's not hard to see why this is such an important development: India's rural population currently contributes just 11% of the country's internet users but represents 70% of its entire population. Further, explosive growth here is inevitable.

MOBILE BRAND OWNERSHIP

% Indian internet users who own the following

SAMSUNG	NOKIA	Micromax	SONY	MOTOROLA	iPhone	Microsoft	lenovo	LG	HTC	Xiaomi	BlackBerry	Karbonn	LAVA	HUAWEI
40%	26%	18%	24%	12%	12%	12%	10%	9%	9%	9%	7%	7%	7%	6%

Question: Which of the following mobile brands do you currently own? ///
Base: Indian Internet Users Aged 16-64 /// **Source:** GlobalWebIndex Q3 2015

Explore this data in PRO Platform /// Click here:
Mobile > Handset Brand > Mobile Brand Ownership

The availability of cheap mobile handsets is vital to this. As our chart makes clear, Samsung may be ahead by some margin for overall ownership, but Nokia and Micromax with their affordable, internet-ready handsets also feature prominently. Compared to other markets, Indian internet users over-index considerably for cheaper devices, particularly in the lower income groups. So, around a quarter in the lowest quartile are using Micromax, compared to 17% in the highest group. Similarly, 36% in the least affluent group are using Samsung versus around half in the highest quartile. And while names like Micromax and Nokia hold similar usage rates among rural and urban Indian internet users, a name such as Samsung enjoys much higher usage within the urban segments.

Seen in this light, it's obvious why Mark Zuckerberg is keen to increase internet coverage in countries like India and why the company has invested so much time and effort into Facebook Lite – a version of the service designed for those who need to use it in relatively data-light ways. Over the last year, we've had the arrival of a comparable offering from LINE and you can bet that others will follow suit in 2016. Quite simply, for those global services eyeing up new growth opportunities, stripped-down or lite versions of their offerings will be key to winning over tomorrow's mobile-first but data-poor internet users.

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Photo Credits: Page 49-50 /// New York Apple store on Fifth Avenue | Andrey Bayda - Shutterstock.com   Page 53 /// Empty Billboard on the Highline Park, Meatpacking District in Manhattan, New York | Snorpey – flickr.com

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