



SOCIAL INSIGHTS

MAKING SENSE OF BROADER ICT TRENDS FROM SOCIAL MEDIA AUDIENCE DATA

SIMON KEMP •  KEPIOS • #ITUWTIS 2020 • DECEMBER 2020

 **KEPIOS**



DIGITAL 2020

GLOBAL DIGITAL OVERVIEW

ESSENTIAL INSIGHTS INTO HOW PEOPLE AROUND THE WORLD USE
THE INTERNET, MOBILE DEVICES, SOCIAL MEDIA, AND ECOMMERCE

we
are
social





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ALL THE NUMBERS YOU NEED

THE BROAD THEMES WE COVER IN OUR REPORTS



INTERNET & WEB

OVERALL ADOPTION, CONNECTION SPEEDS, TOP WEBSITES, TIME SPENT, TOP ACTIVITIES



MOBILE & APPS

OVERALL ADOPTION, TYPES OF HANDSET, TOP MOBILE APPS, DATA CONSUMPTION



SOCIAL MEDIA

OVERALL ADOPTION, COUNTRY INSIGHTS, USE BY PLATFORMS, TIME SPENT, ACTIVITIES



ONLINE SHOPPING

ADOPTION BY DEVICE AND COUNTRY, SPEND BY CATEGORY, METHOD OF PAYMENT



DIGITAL ADVERTISING

BRAND DISCOVERY BY CHANNEL, TOP AD FORMATS, GLOBAL SPEND, TIME TRENDS

TOPICS I'LL EXPLORE TODAY



AGE

HOW SOCIAL MEDIA USE AND ADOPTION VARY BY AGE, AND WHAT THIS CAN TELL US ABOUT BROADER ICT ADOPTION BY AGE



GENDER

MAPPING DIFFERENCES IN SOCIAL MEDIA USE BETWEEN WOMEN AND MEN, AND WHAT THIS CAN TELL US ABOUT THE 'DIGITAL GENDER GAP'

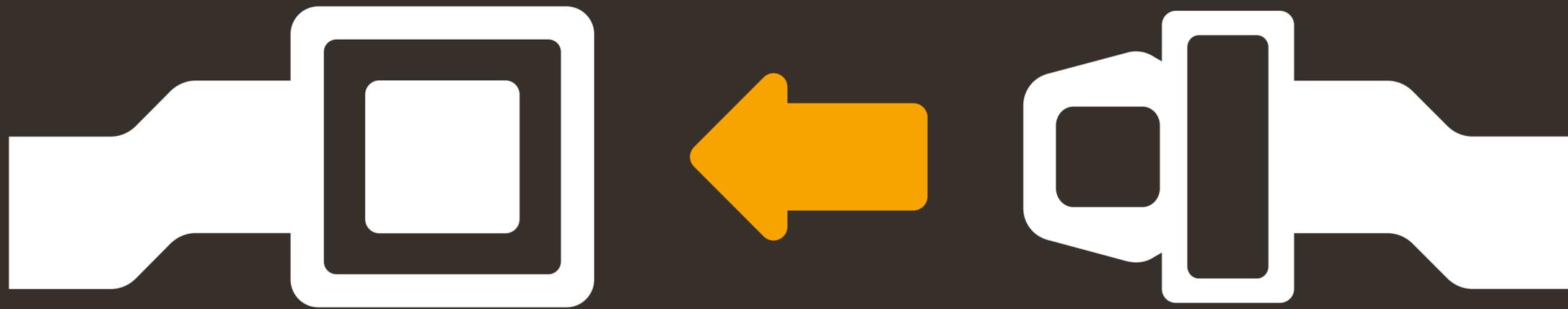


LOCATION

COMPARING SOCIAL MEDIA USE IN CITIES vs. SMALL TOWNS AND RURAL LOCATIONS, AND USING THIS AS A PROXY FOR OVERALL ICT ACTIVITY



SIMON KEMP
@ESKIMON



GLOBAL SOCIAL MEDIA OVERVIEW



MORE THAN HALF OF ALL THE PEOPLE
ON EARTH NOW USE SOCIAL MEDIA

OCT
2020

SOCIAL MEDIA USE AROUND THE WORLD

THE NUMBER OF PEOPLE WHO ACTIVELY USE SOCIAL NETWORKS AND MESSENGER SERVICES

TOTAL NUMBER OF
ACTIVE SOCIAL
MEDIA USERS



we
are
social

4.14
BILLION

SOCIAL MEDIA
PENETRATION (USERS
vs. TOTAL POPULATION*)



53%

ANNUAL GROWTH IN
THE TOTAL NUMBER OF
SOCIAL MEDIA USERS



+12.3%
+453 MILLION

TOTAL NUMBER OF SOCIAL
MEDIA USERS ACCESSING
VIA MOBILE PHONES



4.08
BILLION

PERCENTAGE OF TOTAL
SOCIAL MEDIA USERS
ACCESSING VIA MOBILE



99%



MORE THAN 2 IN 3 PEOPLE AROUND THE WORLD
AGED 13+ ARE ALREADY SOCIAL MEDIA USERS



**SOCIAL MEDIA USER NUMBERS HAVE ALSO BEEN
GROWING QUICKLY OVER RECENT MONTHS**

+453 MILLION

NEW SOCIAL MEDIA USERS OVER THE PAST 12 MONTHS



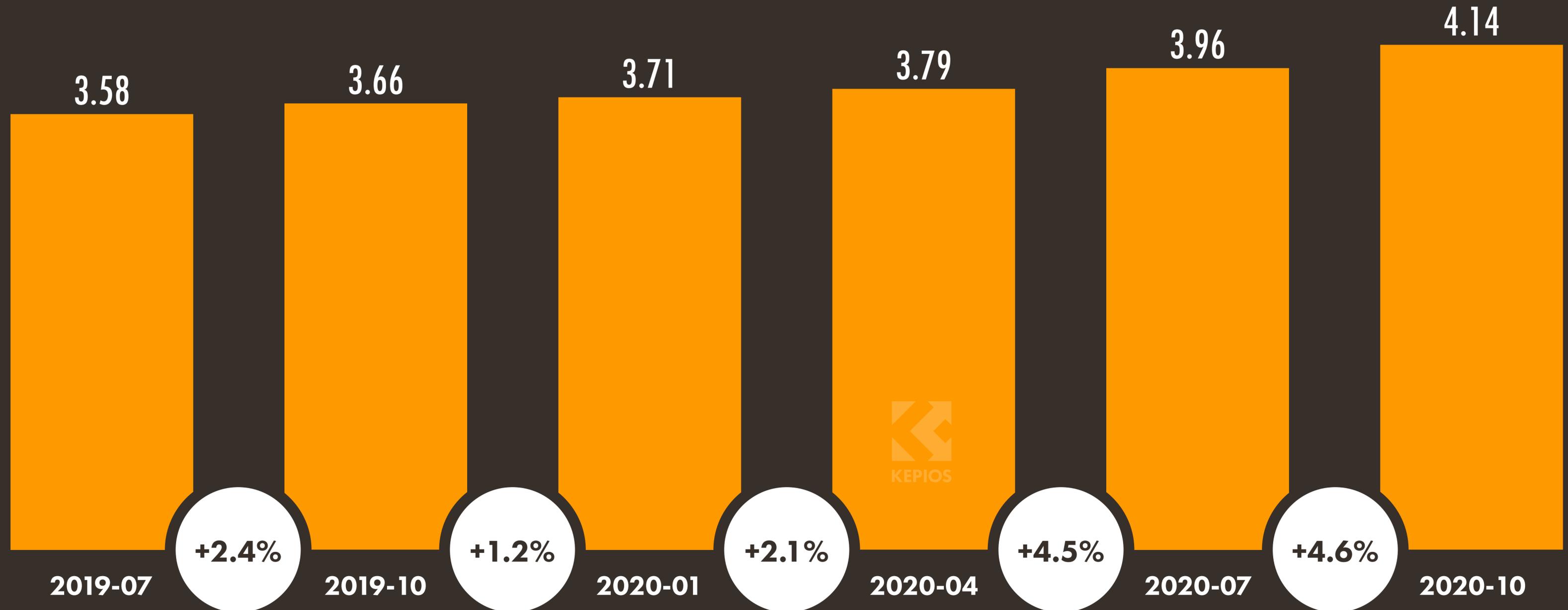
**SOCIAL MEDIA USER GROWTH APPEARS TO
HAVE **ACCELERATED** OVER RECENT MONTHS**

OCT
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QUARTERLY GROWTH IN GLOBAL SOCIAL MEDIA USERS

THE NUMBER OF PEOPLE AROUND THE WORLD USING SOCIAL MEDIA, INCLUDING QUARTER-ON-QUARTER RATE OF CHANGE

 FIGURES PRESENTED HERE USE THE LATEST AVAILABLE DATA, AND MAY NOT MATCH VALUES PUBLISHED IN OUR PREVIOUS REPORTS



+2 MILLION

NEW SOCIAL MEDIA USERS *EVERY SINGLE DAY*

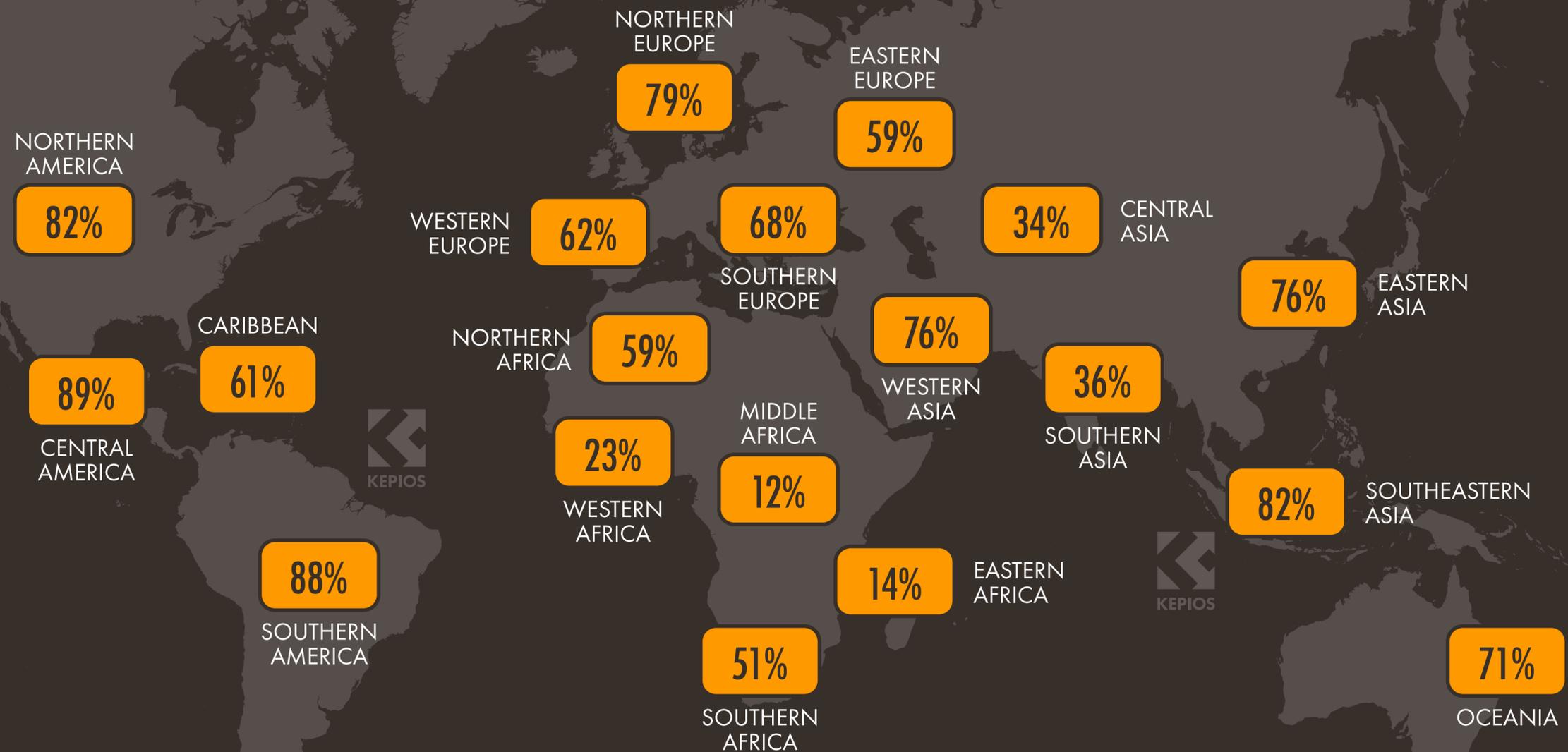


**HOWEVER, SOCIAL MEDIA ADOPTION STILL
ISN'T EVENLY DISTRIBUTED AROUND THE GLOBE**

OCT
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ELIGIBLE SOCIAL MEDIA ADOPTION BY REGION

THE NUMBER OF MONTHLY ACTIVE SOCIAL MEDIA USERS AS A PERCENTAGE OF THE POPULATION AGED 13+



SOURCE: KEPIOS ANALYSIS (OCTOBER 2020). **NOTES:** DUE TO DIFFERENCES IN DATA AVAILABILITY AT A COUNTRY LEVEL, FIGURES SHOWN HERE MAY NOT CORRELATE TO THE GLOBAL FIGURES WE REPORT FOR SOCIAL MEDIA USE. POPULATION DATA IS BASED ON FIGURES FROM THE UNITED NATIONS AND THE U.S. CENSUS BUREAU. REGION NAMES AND ASSOCIATED COUNTRY GROUPINGS FOLLOW THE UNITED NATIONS GEOScheme.



BUT THE **VALUE OF THIS DATA MAY EXTEND WELL
BEYOND TRACKING SOCIAL MEDIA ADOPTION**



OUR ANALYSIS SUGGESTS THAT ALMOST **9 IN 10 INTERNET USERS ACCESS SOCIAL MEDIA TODAY**

POTENTIAL OPPORTUNITY



COULD SOCIAL MEDIA DATA HELP US TO IDENTIFY
BROADER TRENDS IN ICT ADOPTION AND USE?



#1

**SOCIAL MEDIA
USE BY AGE**

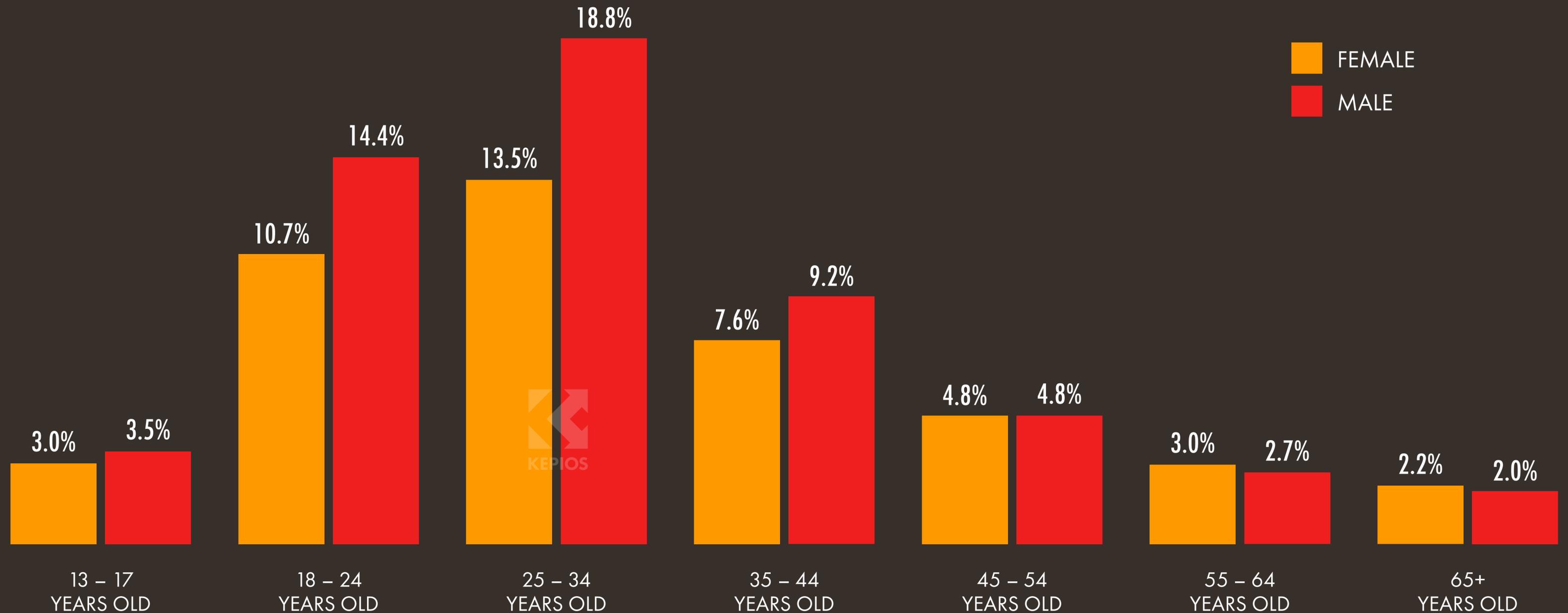


YOUNGER PEOPLE ACCOUNT FOR THE LARGEST
SHARE OF THE WORLD'S SOCIAL MEDIA USERS

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PROFILE OF THE SOCIAL MEDIA ADVERTISING AUDIENCE

SHARE OF THE COMBINED GLOBAL ADVERTISING AUDIENCE* OF FACEBOOK, INSTAGRAM, AND FACEBOOK MESSENGER BY AGE AND GENDER*



SOURCE: EXTRAPOLATIONS OF DATA FROM FACEBOOK'S SELF-SERVICE ADVERTISING TOOLS (OCTOBER 2020). ***NOTES:** FACEBOOK REPORTS THAT THESE FIGURES HAVE BEEN DE-DUPLICATED, SO FIGURES SHOULD NOT DOUBLE-COUNT USERS OF MULTIPLE PLATFORMS. FACEBOOK'S TOOLS DO NOT PUBLISH AUDIENCE DATA FOR GENDERS OTHER THAN 'MALE' OR 'FEMALE'. ***ADVISORY:** DATA ON THIS CHART REPRESENTS THE ADVERTISING AUDIENCE ONLY, AND MAY NOT CORRELATE TO RESPECTIVE SHARES OF TOTAL ACTIVE USERS.

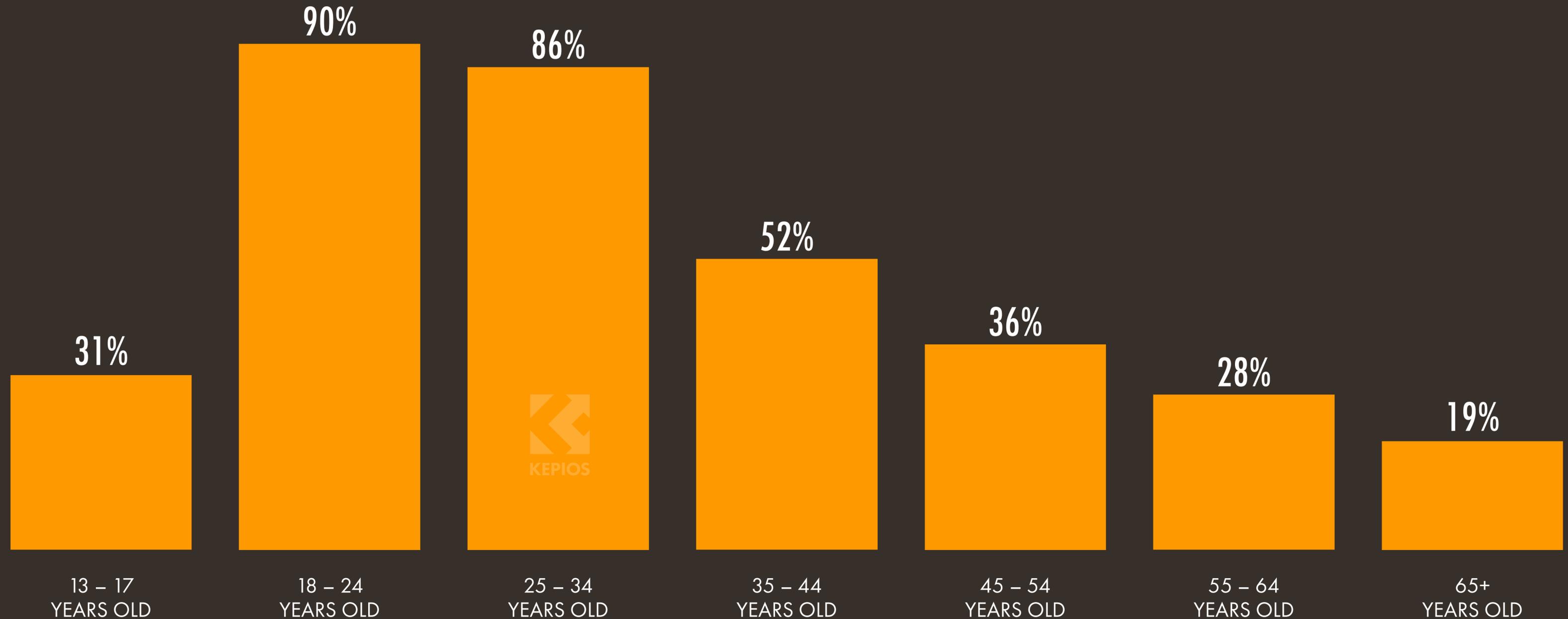


**PEOPLE AGED 20-39 REPRESENT THE LARGEST
GROUP OF **SOCIAL MEDIA USERS** IN CHINA TOO**

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SOCIAL MEDIA ADOPTION BY AGE GROUP

PERCENTAGE OF THE TOTAL POPULATION* IN EACH AGE GROUP THAT USES AT LEAST ONE OF FACEBOOK, INSTAGRAM, OR FACEBOOK MESSENGER



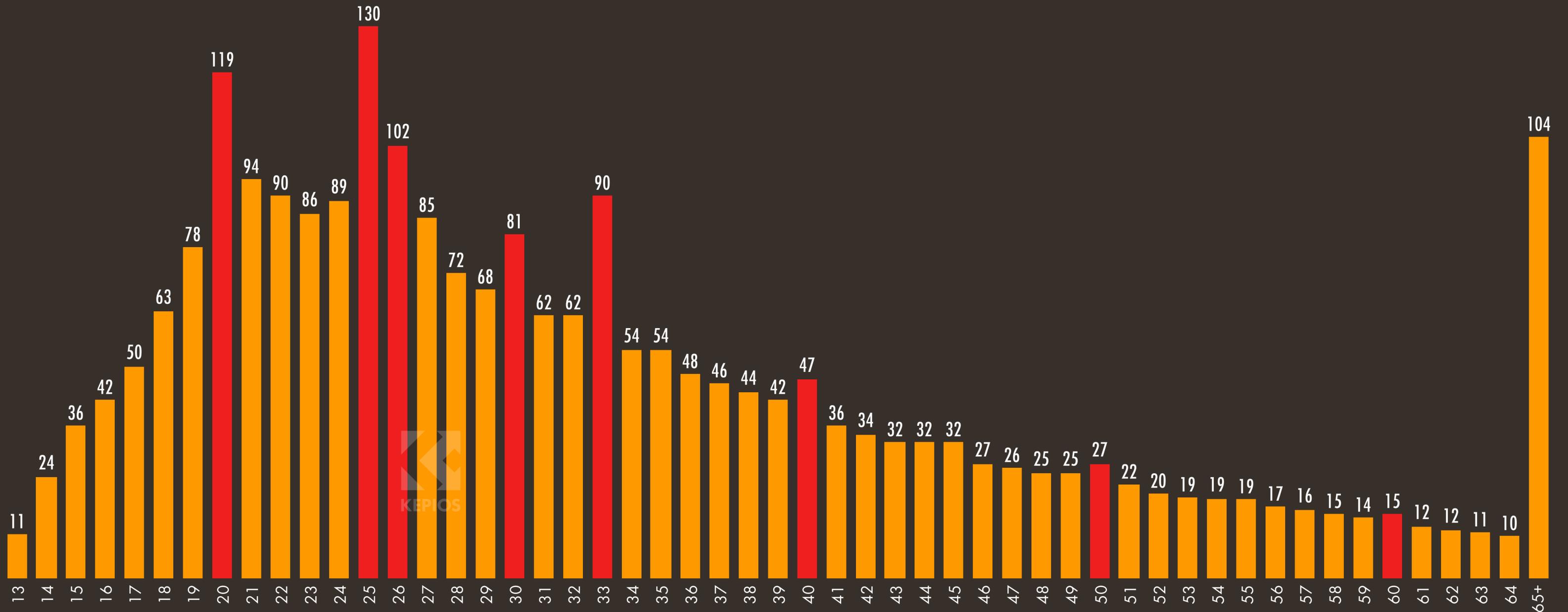


AGE IS **USER-DECLARED** ON FACEBOOK, SO WE SEE SOME INTERESTING **CURIOSITIES** IN THE DATA

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2020

FACEBOOK INC.'S AD AUDIENCE BY SELF-DECLARED AGE

MILLIONS OF PEOPLE THAT USE AT LEAST ONE OF FACEBOOK, INSTAGRAM, OR FACEBOOK MESSENGER EACH MONTH, BY THEIR SELF-DECLARED AGE





THE PATTERN OF THESE SPIKES IS IDENTICAL IN AGE DATA FOR BOTH FEMALE AND MALE USERS



**USING OVERLY GRANULAR AGE DATA MAY LEAD
TO SOME **DISTORTIONS** IN YOUR FINDINGS**



ADVISORY: IT'S PROBABLY SAFER TO ANALYSE **AGE GROUPS**, RATHER THAN SINGLE-YEAR AGE BANDS

HOWEVER



**THESE ANOMALIES ARE STABLE, SO ANALYSING
TRENDS OVER TIME CAN STILL PROVIDE **INSIGHTS****

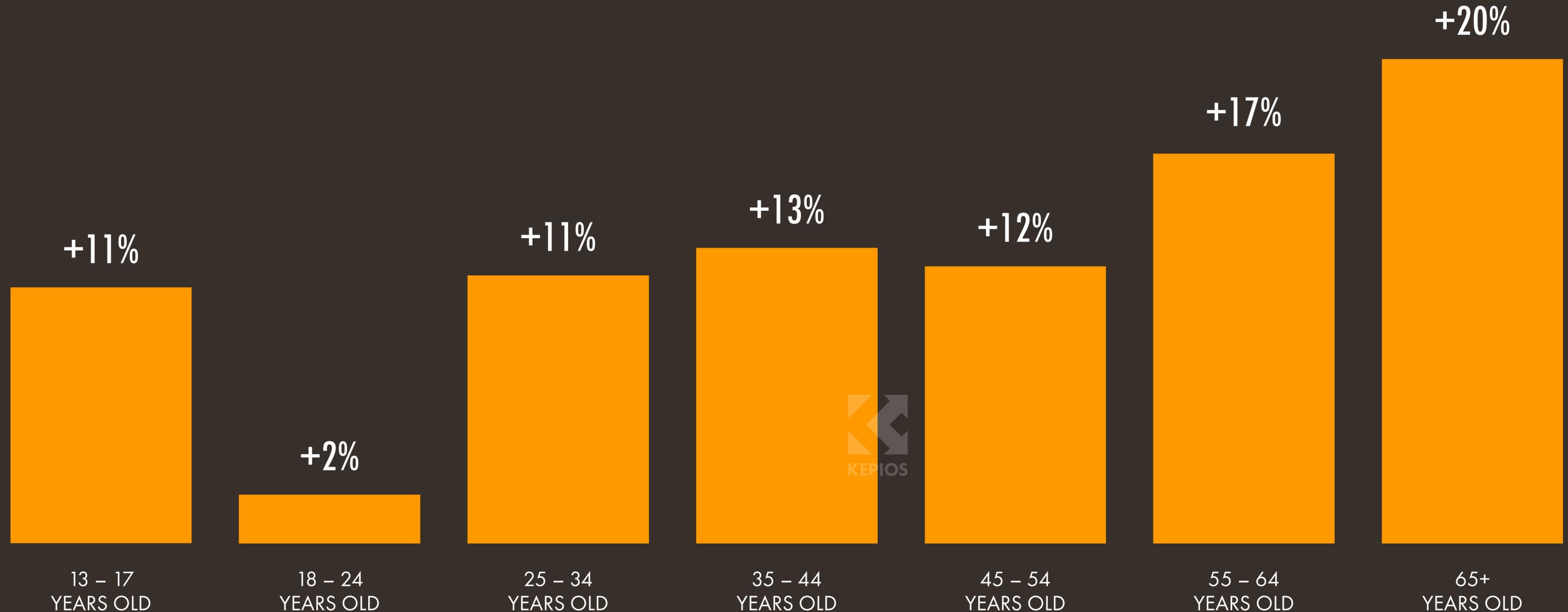


FOR EXAMPLE, **SENIORS** REPRESENT TODAY'S
FASTEST-GROWING FACEBOOK AUDIENCE

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ANNUAL GROWTH OF FACEBOOK'S AUDIENCE BY AGE

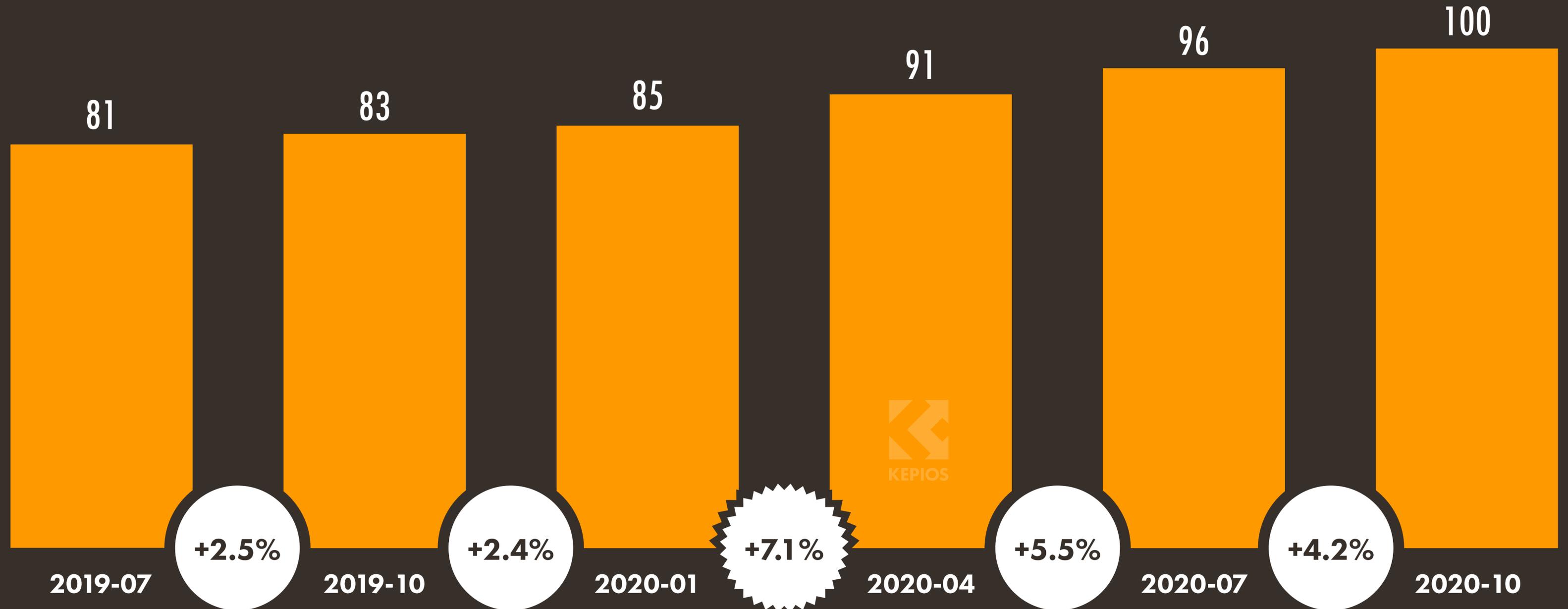
YEAR-ON-YEAR INCREASE IN THE NUMBER OF PEOPLE THAT ADVERTISERS CAN REACH USING FACEBOOK, BY AGE GROUP



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QUARTERLY GROWTH IN FACEBOOK USERS AGED 65+

MILLIONS OF PEOPLE THAT ADVERTISERS CAN REACH USING ADVERTS ON FACEBOOK, WITH QUARTER-ON-QUARTER RATE OF CHANGE



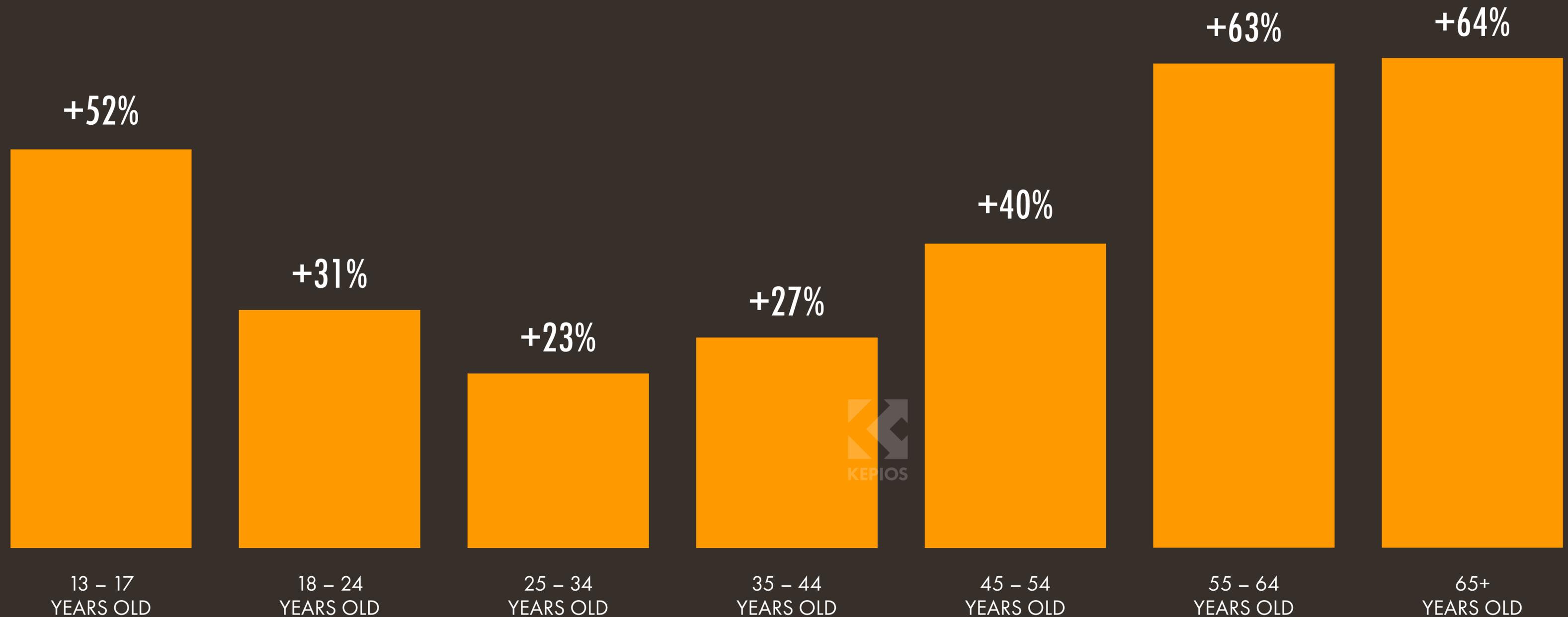


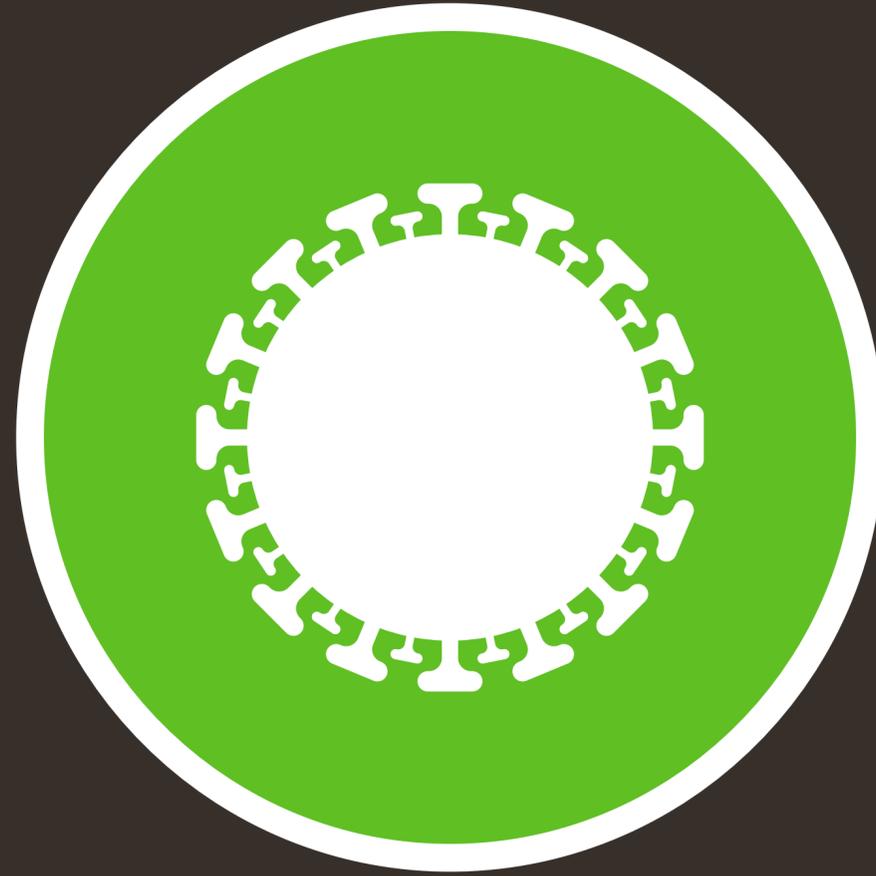
INSTAGRAM HAS ALSO BEEN SEEING STRONG
GROWTH IN USERS AGED 65 AND ABOVE

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2020

ANNUAL GROWTH OF INSTAGRAM'S AUDIENCE BY AGE

YEAR-ON-YEAR INCREASE IN THE NUMBER OF PEOPLE THAT ADVERTISERS CAN REACH USING INSTAGRAM, BY AGE GROUP

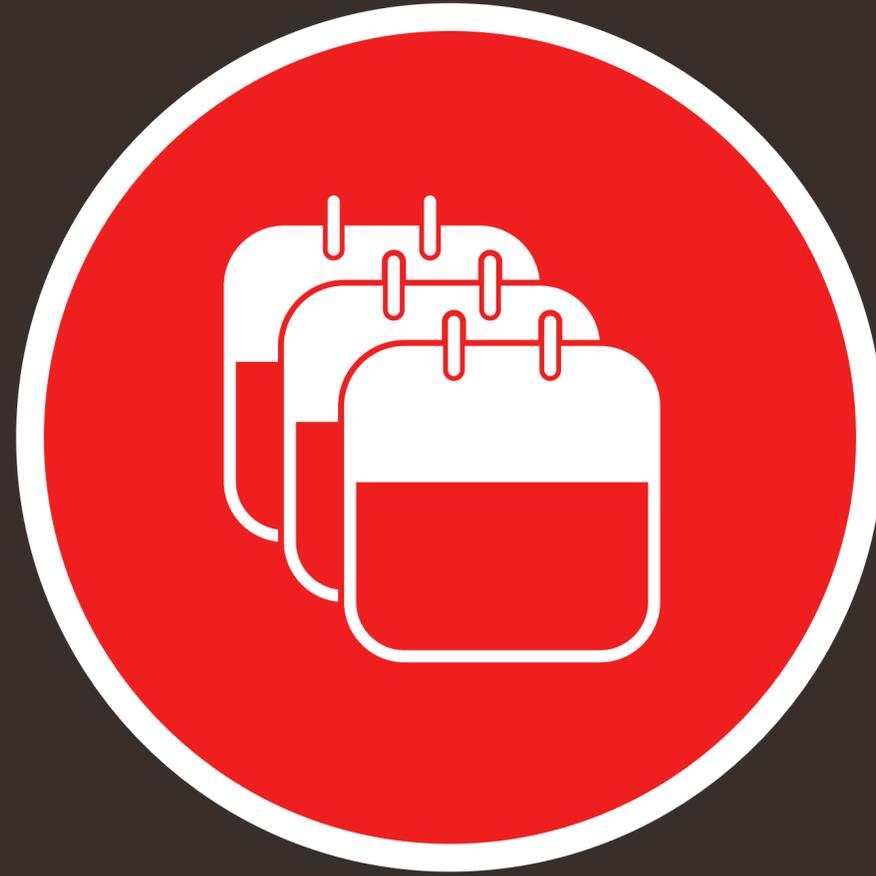




COVID 'LOCKDOWNS' MAY HAVE CONTRIBUTED TO THESE INCREASES AMONGST OLDER USERS



**WHILE THE CAUSE MAY ONLY BE TEMPORARY,
THE IMPACT SHOULD BE MORE **ENDURING****



**SOCIAL MEDIA IS A HIGH-FREQUENCY ACTIVITY,
WITH MOST USERS 'LOGGING ON' EVERY DAY**

IMPLICATION



**AS SENIORS' 'DIGITAL FAMILIARITY' INCREASES,
ACTIVITY MAY **EXTEND** TO OTHER AREAS OF ICT**

#2

**SOCIAL MEDIA
USE BY GENDER**



NOTE: MANY PLATFORMS ONLY REPORT **BINARY**
'FEMALE' OR 'MALE' GENDERS IN AUDIENCE DATA

SHARE OF SOCIAL MEDIA USERS BY GENDER

FEMALE SOCIAL MEDIA USERS AS A PERCENTAGE OF TOTAL GLOBAL SOCIAL MEDIA USERS*



45.9%



MALE SOCIAL MEDIA USERS AS A PERCENTAGE OF TOTAL GLOBAL SOCIAL MEDIA USERS*



54.1%



**GLOBAL SOCIAL MEDIA USERS ARE CURRENTLY
18% MORE LIKELY TO BE MALE THAN FEMALE**

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SHARE OF SOCIAL MEDIA USERS BY GENDER

PERCENTAGE SHARE OF EACH REGION'S SOCIAL MEDIA USERS BY GENDER*



FEMALE GLOBAL AVERAGE: 46%
 MALE GLOBAL AVERAGE: 54%

SOURCE: KEPIOS ANALYSIS OF DATA FROM VARIOUS SOURCES (OCTOBER 2020). ***NOTES:** FIGURES REPRESENT EACH GENDER'S SHARE OF TOTAL SOCIAL MEDIA USERS IN THE RESPECTIVE REGION. MOST SOCIAL MEDIA ADVERTISING TOOLS DO NOT PUBLISH AUDIENCE DATA FOR GENDERS OTHER THAN 'FEMALE' OR 'MALE', SO PERCENTAGES SHOWN HERE REPRESENT SHARE OF THOSE TWO GENDERS ONLY. REGIONS AND COUNTRY GROUPINGS AS DEFINED BY THE UNITED NATIONS GEOScheme.



THE SOCIAL MEDIA GENDER GAP IN SOUTHERN ASIA **PERSISTS**, DESPITE RAPID USER GROWTH

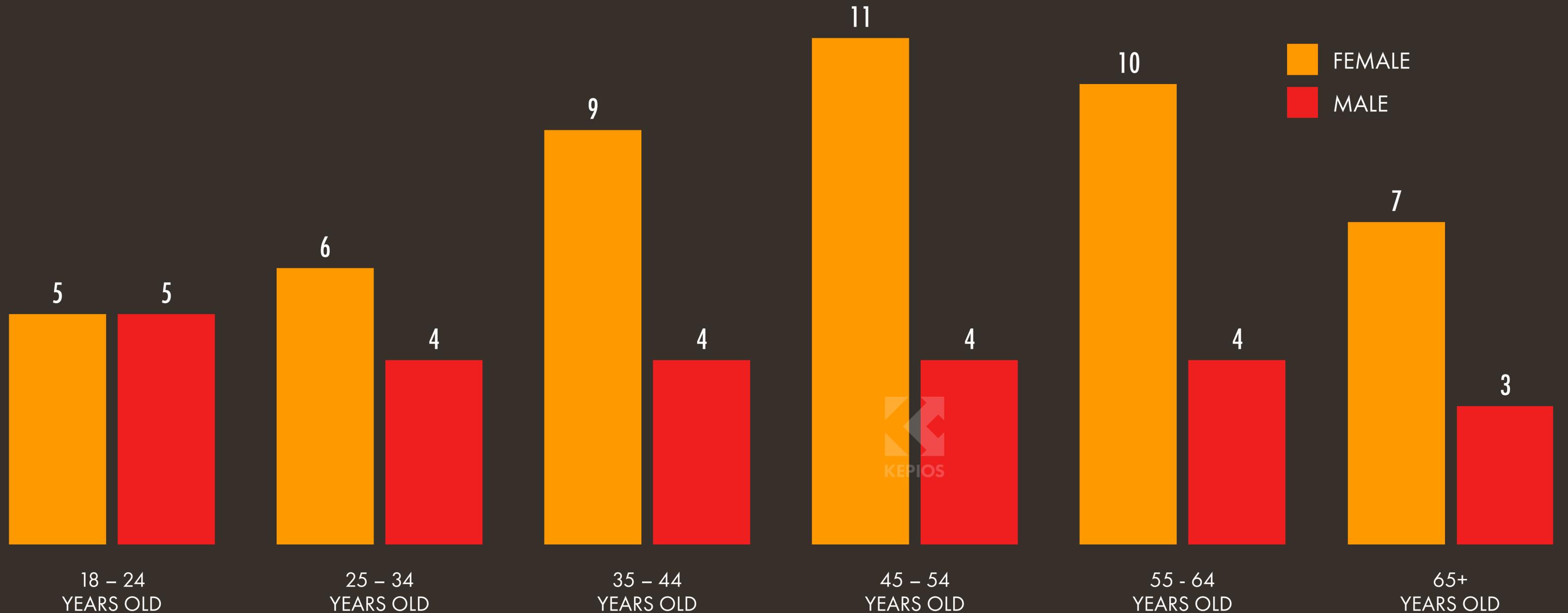


**BUT ONCE THEY START USING SOCIAL MEDIA,
WOMEN TEND TO BE **MORE ACTIVE** THAN MEN**

OCT
2020

FACEBOOK MONTHLY COMMENTS BY AGE AND GENDER

MEDIAN NUMBER OF TIMES EACH MONTH THAT TYPICAL GLOBAL FACEBOOK USERS* COMMENT ON FACEBOOK POSTS



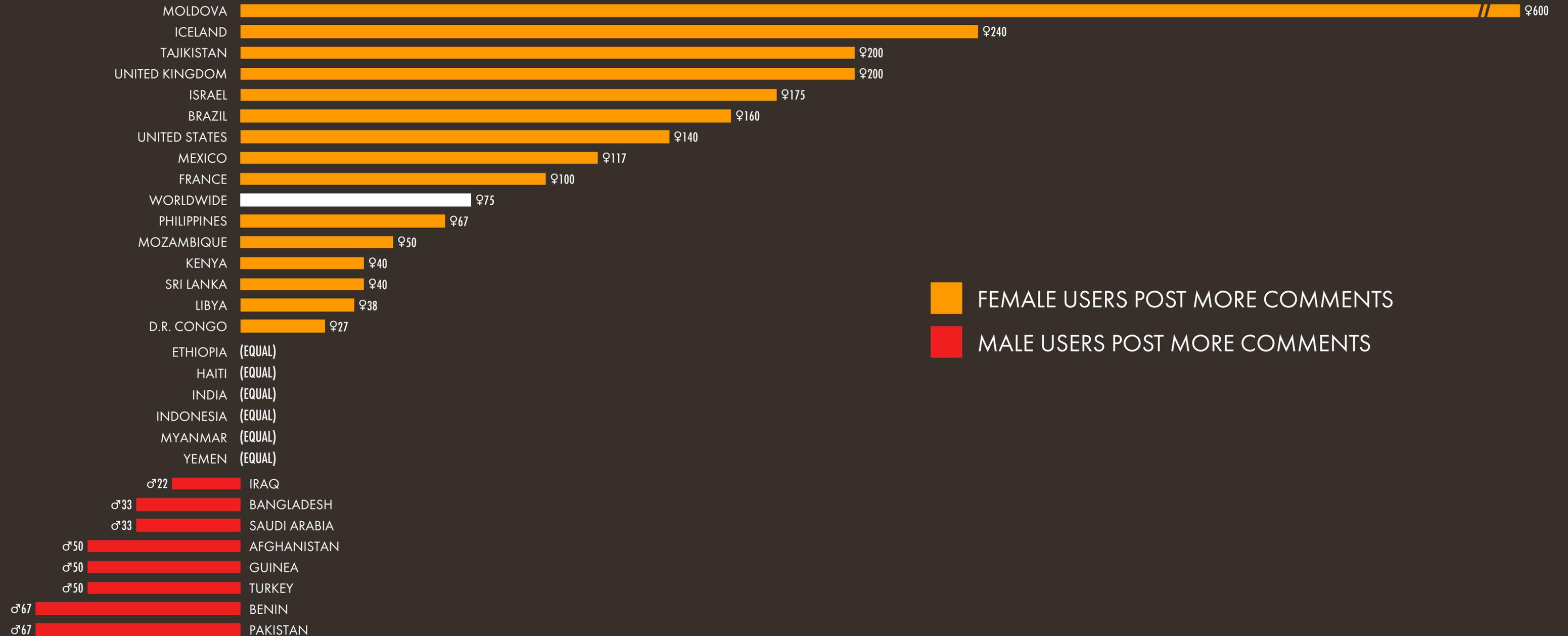


RATIOS VARY BY COUNTRY, BUT OUR ANALYSIS SUGGESTS INCOME IS **NOT THE PRIMARY DRIVER**

OCT
2020

COMPARING FACEBOOK COMMENTS BY GENDER

THE MEDIAN NUMBER OF FACEBOOK COMMENTS POSTED BY EACH GENDER, SHOWN AS AN EQUALISED INDEX



 FEMALE USERS POST MORE COMMENTS
 MALE USERS POST MORE COMMENTS



**THESE FINDINGS MAY OFFER INSIGHTS INTO
HOW WOMEN INTERACT WITH **BROADER ICT****

#3

SOCIAL MEDIA USE IN URBAN AND RURAL CONTEXTS



THERE'S NO GLOBALLY AGREED DEFINITION FOR 'URBAN', SO I'LL FOCUS ON **BIG CITIES INSTEAD**

More than half of the combined global audience of Facebook, Instagram, and Facebook Messenger lives in cities with at least **500,000 inhabitants**.



SOCIAL MEDIA USERS ARE **MORE LIKELY TO LIVE
IN BIG CITIES THAN THE OVERALL POPULATION**

SOCIAL MEDIA USERS TEND TO BE URBAN



PERCENTAGE OF THE WORLD'S **TOTAL POPULATION** THAT LIVES IN CITIES WITH 500,000 OR MORE INHABITANTS:

29%



PERCENTAGE OF THE COMBINED **SOCIAL AUDIENCE** OF FACEBOOK, INSTAGRAM, AND FB MESSENGER THAT LIVES IN CITIES WITH 500,000 OR MORE INHABITANTS:

52%



**SOCIAL MEDIA USE IS LOWER IN RURAL AREAS,
SUGGESTING LOWER OVERALL ICT ADOPTION**



**CITIES' SHARE OF TOTAL SOCIAL MEDIA USERS
IS EVEN HIGHER IN DEVELOPING ECONOMIES**

**NOV
2020**

PEOPLE LIVING IN CITIES WITH 100,000+ INHABITANTS

COMPARING THE CONCENTRATION OF NATIONAL POPULATIONS* AND SOCIAL MEDIA USERS LIVING IN CITIES WITH 100,000 OR MORE INHABITANTS

#	COUNTRY	SHARE OF POPULATION	SHARE OF SOCIAL	SOCIAL vs. POPULATION	#	COUNTRY	SHARE OF POPULATION	SHARE OF SOCIAL	SOCIAL vs. POPULATION
01	INDIA	16%	68%	4.1	16	FRANCE	15%	33%	2.2
02	UNITED STATES	32%	43%	1.3	17	UNITED KINGDOM	44%	49%	1.1
03	INDONESIA	35%	49%	1.4	18	THAILAND	41%	43%	1.1
04	PAKISTAN	19%	76%	3.9	19	ITALY	23%	42%	1.8
05	BRAZIL	55%	58%	1.1	20	SOUTH AFRICA	41%	52%	1.3
06	NIGERIA	21%	87%	4.2	21	TANZANIA	12%	79%	6.4
07	BANGLADESH	14%	63%	4.5	22	MYANMAR	20%	42%	2.1
08	MEXICO	64%	66%	1.0	23	COLOMBIA	60%	73%	1.2
09	PHILIPPINES	29%	46%	1.6	24	KENYA	12%	67%	5.5
10	DEM. REP. OF THE CONGO	17%	86%	5.1	25	SPAIN	50%	62%	1.2
11	EGYPT	22%	53%	2.5	26	ARGENTINA	60%	54%	0.9
12	ETHIOPIA	6%	68%	11.4	27	ALGERIA	54%	63%	1.2
13	VIETNAM	12%	62%	5.3	28	UKRAINE	90%	67%	0.7
14	TURKEY	81%	84%	1.0	29	UGANDA	7%	87%	11.8
15	GERMANY	35%	51%	1.5	30	IRAQ	62%	86%	1.4



SOURCE: KEPIOS ANALYSIS; EXTRAPOLATIONS OF DATA FROM FACEBOOK'S SELF-SERVICE ADVERTISING TOOLS (NOV 2020); POPULATION DATA FROM THE UNITED NATIONS AND THE WORLD POPULATION REVIEW (BOTH ACCESSED NOV 2020). ***ADVISORY:** POPULATION DATA MAY BE CONSIDERABLY OLDER THAN SOCIAL MEDIA DATA, AND MAY NOT BE AS COMPREHENSIVE. AS A RESULT, THE COMPARISONS SHOWN ON THIS CHART ARE FOR DISCUSSION ONLY, AND WE RECOMMEND FURTHER RESEARCH AND ANALYSIS BEFORE BUILDING ANY PLANS USING THIS DATA.



SOCIAL MEDIA DATA MAY MAKE IT **EASIER TO
TRACK PROGRESS TOWARDS CLOSING THIS GAP**

RECAP

SUMMARY OF KEY FINDINGS

1. **53%** OF THE WORLD'S POPULATION USES SOCIAL MEDIA
2. **9 IN 10** INTERNET USERS ARE ACTIVE ON SOCIAL MEDIA
3. 2 IN 3 SOCIAL MEDIA USERS ARE **BELOW THE AGE OF 35**
4. **SENIORS** ARE THE FASTEST-GROWING SOCIAL MEDIA AUDIENCE
5. MEN ARE **18% MORE LIKELY** TO USE SOCIAL MEDIA THAN WOMEN
6. WOMEN ARE **MORE ACTIVE** ONCE THEY START USING SOCIAL MEDIA
7. SOCIAL MEDIA USERS ARE MORE LIKELY TO **LIVE IN LARGE CITIES**
8. DIGITAL URBANISATION IS GREATER IN **DEVELOPING ECONOMIES**



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SIMON KEMP



@ESKIMON



REPORTS@KEPIOS.COM



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