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The era of We

and the rise of online communities

Contents

Foreword

globalwebindex

Jason Mander
Chief Research Officer

The internet has been a gathering place for different communities since its inception, from Usenet newsgroups, through to the messageboard era, and on to the social networks of the present. But the internet is a different beast these days, and questions over misinformation, trust, and the extent of brand involvement are never far away. Marketers are seeing how reaching users at their points of passion can be more relevant, offer more assurances about data security, and spark deeper connections with their consumers. Online communities have emerged as an ideal channel for this interest-based marketing approach.

In this report we set out to discover: what now drives social dynamics online, and what sort of opportunity is there for brands? At GlobalWebIndex, our research puts the focus on the user, to understand exactly what they do online and why. Through this report, we're able to shed light on the inner workings of online social spaces from a user's perspective. To help us understand the ties that bind online, we have the perfect partner in Reddit, a platform that's been connecting like-minded, passionate community members for well over a decade.

reddit

Jack Koch
Global Head of Marketing Sciences

When I mention that I work at Reddit, people are often eager to share stories of profound engagement, memorable anecdotes, and new hobbies or products they've discovered in our communities. For some users, Reddit is a place to learn and explore passions and interests. For others it's where they discuss personal issues and find comfort among those with similar experiences. And many come to Reddit purely for new content that makes them laugh or think – before they see it elsewhere. Our communities are a valuable part of user's lives, and where they can be themselves... something they might not get to do anywhere else.

As the social media landscape continues to fragment and people look for authentic connections based on shared interests, we're proud that Reddit offers a place for users to find community. And with consistent growth across our user base, time spent on our site and apps, and volume of conversations, it's clear that the need for online community is only growing stronger. We're excited to partner with GlobalWebIndex to quantify this movement, explore the differences between online communities and other destinations, and uncover the impact networks like Reddit bring to belonging, influence, and culture.

Key insights

01

Online communities are on the rise

Online community sites have emerged as the go-to platforms for the increasing amount of user-generated content posted online, and their perceived importance is growing as internet users move away from me-centric social sharing to more we-centric conversations online.

02

They fill a void for self-expression and belonging

Social media once provided an outlet for users to be themselves, but times have changed. Internet users still want to express who they are, but in a more communal environment. Community sites are felt to be more welcoming and have more meaningful peer-to-peer connections.

03

There's wisdom in crowds

Internet users in the US trust the consensus of community sites more than social media sites or influencer's recommendations. Gen Z view community sites to be more reliable than an expert's opinion and almost as reliable as mainstream news outlets.

04

Anonymity fuels authenticity

Visitors are more able to express themselves when there's less pressure to disclose who they are. Issues that internet users have with trust and self-image can be addressed in these spaces.

05

Brands are invited to join...

As consumers grow weary with messaging from influencers and celebrities, and meaningful connections become harder to find online, consumers are looking for more personal relationships with brands.

06

..but have to act like committed members

Community site visitors want brands to act like real people, champion an authentic persona, and embrace and contribute to the collective nature of community.

Introduction

We're now sharing huge amounts of content online – from photos and videos to product reviews. Our data shows that in 2019, **83% of global internet users regularly share this kind of information online on a monthly basis**, and this is a truly cross-demographic activity, ranging from 70% of Boomers to almost 90% of Gen Z and Millennials.

This rich stream of content finds its way into many different online environments. It permeates social media sites like Facebook, Instagram or Twitter; online community sites like Reddit; video sites like YouTube; livestreaming platforms and messaging apps. But what we share, and who we share it with, is changing.

Social media sites were once a place where users would comfortably share details about their personal life to hundreds of followers. Fast-forward to 2019, and these sites are now primarily places to consume media content, with personal sharing moving further to the sidelines.

For authentic connections internet users are increasingly turning toward online communities as places where they can express themselves. In the U.S. **64% of online community site visitors say they're visiting those sites more often now than they did a couple of years ago**, and 46% say the sites have become more important to them over time. Online communities provide a place for genuine human connection and belonging in the digital world. On them, we can meet people who share our interests, learn from others, and have meaningful conversations.

And these spaces offer marketers an opportunity to connect with consumers in a more meaningful and authentic way. As we cover in this report, **online communities have become an important touchpoint across the consumer journey, especially among younger generations** – and our research shows that there's a big appetite among the majority of online community participators for brands to join the conversation and have a voice. This marketing channel offers brands a way of staying ahead of emerging expectations, giving consumers a sense of involvement, and ultimately deepening their connection with today's consumers.

So why is online community culture flourishing? Why are we moving away from me-centric one way online experiences and gravitating toward we-centric communal experiences? To find out, we leveraged our ongoing online global research alongside a bespoke study among internet users in the U.S., with a deep-dive into those who regularly participate in online communities. This is what we found.

We're now sharing huge amounts of content online – from photos and videos to product reviews. Our data shows that in 2019, 83% of global internet users regularly share this kind of information online on a monthly basis.

GROWTH IN ONLINE COMMUNITY PARTICIPATION
% of global internet users who engage with online forums, blogs, and/or vlogs across all devices

2017
72%

2018
74%

2019
76%

Question: In the past month, which of the following things have you done on the internet via any device?
Source: GlobalWebIndex 2017-2019 (averages conducted between Q1 2017-Q3 2019)
Base: 303,502 (2017) 391,130 (2018), 351,239 (2019) global internet users aged 16-64

01

The era of we

The rise of the online community: why now?
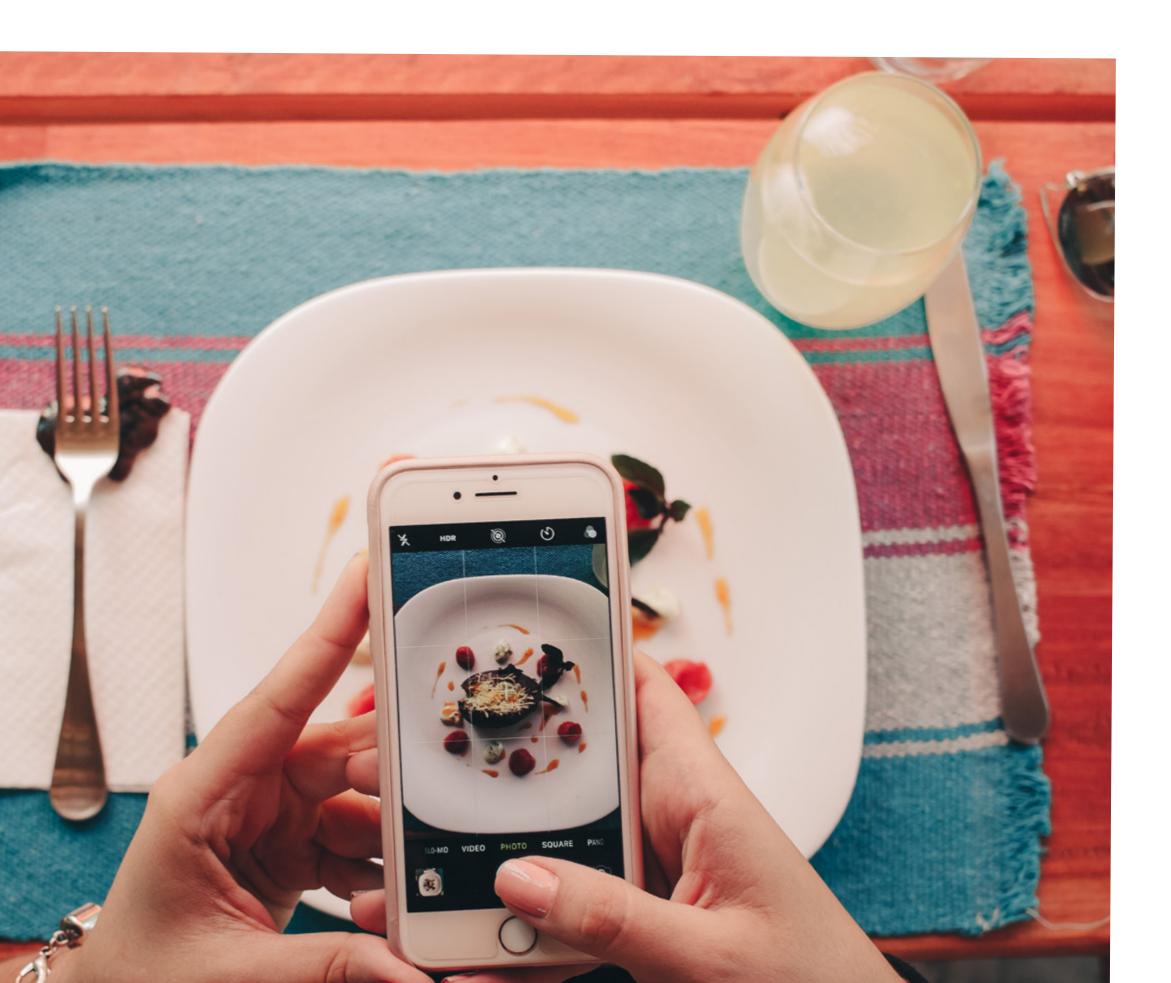
A space to connect and belong

With the saturation of technology in our lives, the processes of everyday living that once tethered us to other people have become increasingly fragmented. Membership in real-world social groups, clubs, and local organizations, has been underlined declining while the time we spend online continues to grow.

And while traditional social media has arguably carved out a space online for what we have lost offline, it has created its own set of issues. These issues typically center around an experience which is more individualistic and based on an ideal self image, where users often cultivate personal brands built on "likes" or views. The authentic connections that we look for, but don't always find, on social media are part of the fabric of online communities – and this is a major reason why people are turning to these spaces more and more. Findings from our study show that making connections with other people who have similar interests (66%) is one of the **primary drivers** behind why users engage in online communities.

Where social groups have become fragmented in the real world, online communities allow people to make connections and find belonging in the digital world.

Moving away from the "broadcasted" self

An integral purpose of social media has always been self-expression. Through photographs, videos, and other content that is representative of who we are – or who we want to be perceived as – we create our online identities to broadcast to the digital world.

Recently however, consumers have started to move away from this notion of the "broadcasted" self. We know this to be the case because social sharing behavior is declining. Between 2014 and 2019, the percentage of global internet users who said that sharing details of their lives is a key motivator for using social media declined from 27% to 20%.

SOCIAL SHARING IS DECLINING
% of global internet users who report "sharing the details of what I'm doing in my daily life" as a reason why they use social media

2014

27%

2019

20%

Question: What are your main reasons for using social media?
Source: GlobalWebIndex 2014 & 2019 (averages conducted between Q3 2014-Q4 2014 & Q1 2019-Q3 2019)
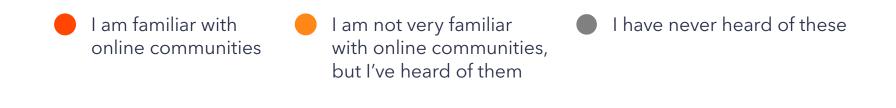**Base:** 83,804 (2014) and 351,239 (2019) global internet users aged 16-64
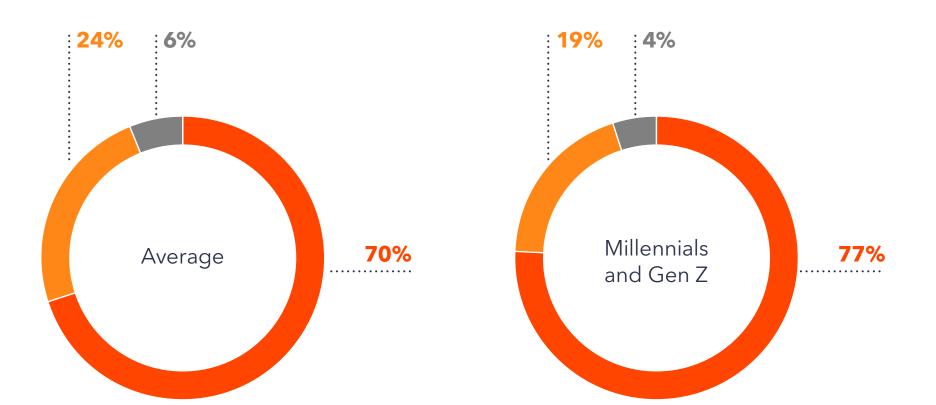
02

The era of we

The modern community

Online communities are hugely prominent in users' daily lives, and play an increasingly important role in both keeping us connected and exploring our personal interests. And it's not just a youth trend, but one that has broad recognition. Results from our study in the U.S. reveal that these types of platforms are well-known by all age groups. Even among internet users who haven't visited community sites recently, 7 in 10 of them are at least somewhat familiar with these platforms, a figure which rises to 77% for Millennials and Gen Z.

FAMILIARITY WITH ONLINE COMMUNITIES

% of internet users in the U.S. who have not visited a community site in the last month who agree with the following statements

- I am familiar with online communities
- I am not very familiar with online communities, but I've heard of them
- I have never heard of these

24%   6%

70%

Average

19%   4%

77%

Millennials and Gen Z

We're all in this together

**WHAT DRIVES USERS
TO VISIT ONLINE COMMUNITY SITES?**
% of online community visitors in the U.S. who
visit for the following reasons

Discover new things — **77%**

Connect with people who
have similar interests — **66%**

Find funny/entertaining
content — **62%**

Keep up with the news/
current events — **60%**

Ask a question to people
knowledgeable about a topic — **60%**

To seek honest advice — **55%**

Get a recommendation for
a product/service to buy — **54%**

To have a safe space to
share ideas, thoughts, etc. — **49%**

To have genuine conversations
with other people — **44%**

To share advice — **38%**

Communities help us feel united in an accelerating world of fractured media, competing interests, and dynamic change.

When asked why they visited online community sites, **the second-most popular answer among users in the U.S. was to connect with people who have similar interests (66%)**, only behind discovering new things (77%).Shared experience is important across all age groups, and even comes ahead of finding funny or entertaining content. It also comes ahead of factors such as staying up-to-date with news/current events, and asking for knowledge, advice or recommendations from others; all of which demonstrate the importance of using online community sites to be hyper-informed.

Exploring these underlying motivations is key for understanding how online community engagers interact and engage with one another. And it's not only relevant among peer interactions, but in helping brands shape a strategy around online communities as distinct from social networks. We found that 28% of Gen Z and 29% of Millennials say they use social media to share their opinion. For some time now, social media has been used to nurture this type of immediate self-expression. However, while social media sites may encourage self-expression, this doesn't always translate into prompting action; whether that's via product recommendations, advice, or any other call to action.

People see shared experience as powerful sources of connection.

Online community sites, meanwhile, tend to make a more compelling case when encouraging users to act. This is because members seek and trust the recommendations of fellow community members. **As highlighted in the chart, members actively seek advice, opinions, and guidance. Our research also found that more than half of users in the U.S. are actively looking for product recommendations on community sites.** Understanding the power of this is crucial for brands who want to engage their audiences at a more ready point of conversion.
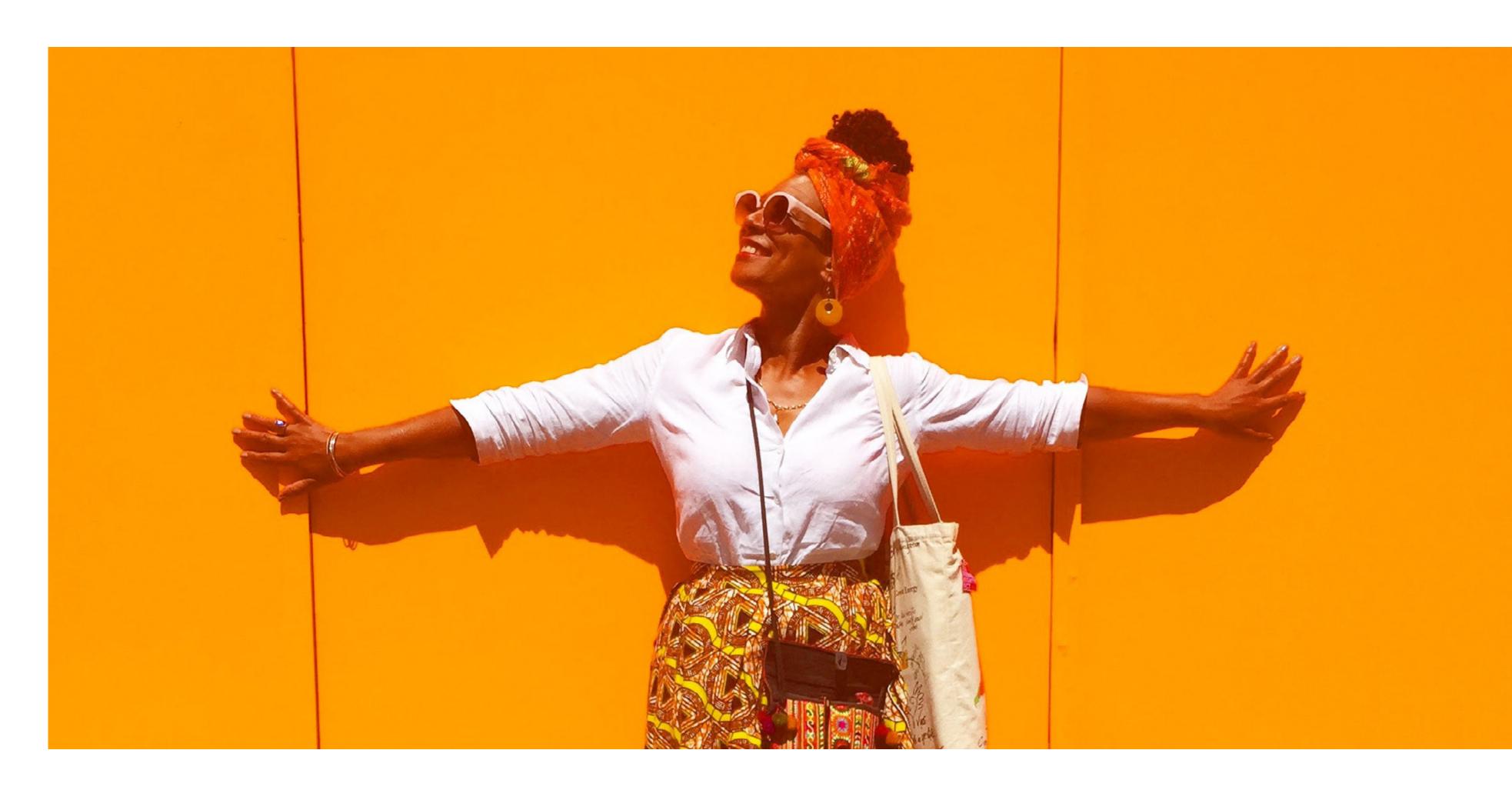
03

The era of we

Reviving the conversation

A community of one's own

We know that users no longer turn to social media to broadcast who they are, what they think, and what they do to the same degree they once did. But beyond that, social media as a whole has fragmented. **In 2015, the typical internet user had 6.1 social media accounts. In 2019, this has risen to 8.8.**

This growth in multi-networking is both a cause and symptom of why consumers have come to see social media differently. When users had a more limited selection of social platforms to choose from, and when the culture of social media was generally less developed, users could share more of their authentic self on each. But as the number of networks available has grown, users are having to curate a different persona for each account.

There's another side to this, too. As social platforms reach near-universal scale, their demographics change and broaden, mirroring the internet at large. How different is one platform from the other, really, if over 90% of internet users in a given country are actively on both? This flattening of platforms is encouraging users to seek out more tightly-knit or controlled peer groups in different places.

Finding a voice

As a term, "social media" encompasses many different ways of socializing. So we investigated from a user's point of view, exactly how environments differ between conventional social platforms and those with a community-led model.

Compared to social media platforms, online community site's conversations were regarded as more meaningful, its atmosphere judged more respectful, and users felt more able to be themselves and respected by others in turn. Social media offers a wide network of people for users to connect with, but community site visitors feel more comfortable in their own skin.

Online community conversations are regarded as more meaningful, their atmosphere judged more respectful, and users felt more able to be themselves and respected by others in turn.

THE COMMUNITY FEELING
GWI asked users of community sites and social media sites how each platform makes them feel. The following chart shows community site visitors responses compared to social media visitors, represented in a percent difference

% difference community sites over social media platforms

I can have meaningful conversations — **+36%**

I am respected by others — **+28%**

I can really be myself — **+24%**

I feel appreciated by other people — **+21%**

My voice is heard — **+19%**

I have a sense of belonging — **+18%**

And what exactly about social media makes its users feel more inhibited than those on community platforms? To gauge this, we asked respondents to identify areas where their social media experience could be improved.

WHAT USERS WOULD IMPROVE ABOUT SOCIAL MEDIA
% of social media users who think the following would improve their experience of using it

More trustworthy news **59%**

Less bullying/offensive commentary **45%**

A more genuine connection with others **36%**

Less pressure to project a certain "self image" **34%**

More opportunities to have meaningful conversations **33%**

More groups or forums to connect with people of similar interests **27%**

Less content from influencers **26%**

A significant group of users reported grievances with the climate of social media. For example, 45% were frustrated with offensive language or bullying, and 36% desired a more genuine connection with others. A third would prefer less pressure to project a certain self-image.

Social media platforms command users in the hundreds of millions, but in spite of their size, users don't always feel like they can be their truest selves, or that the space is truly respectful. **Community platforms, with hubs geared to connect people around more common interests, and often with tighter controls around who can participate in discussions, allow their users to feel more self-confident, more validated, and less intimidated.**

The biggest outright issue users identified with social media was the prevalence of misinformation, or "fake news". Fake news is just the tip of an iceberg that looms into view when looking at how users view social media – that of trust.

Question: Which of the following things, if any, would improve your overall experience using social media?
Source: GlobalWebIndex November 2019
Base: 1,718 social media visitors in the U.S. aged 16-64

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04

The era of we

Creating trust

Trust disrupted

In the digital age, social media is a frequent culprit in the disruption of trust. As mentioned earlier, social platforms can serve as the breeding grounds for "fake news", while widespread data privacy breaches rock consumers' confidence. At the same time, we have to deal with influencers who often portray very unrealistic ideals or lack credibility.

Traditional social media encourages users to post daily life updates to all of their followers. This involves portraying a self-image that's the best version of themselves, whether it's genuine or not, often because they think it's

what others want to see or hear. We've reached a point where the lines between what's real and what's not are blurred, and this has undeniably dented consumer trust.

To understand the extent of the damage, we used a combination of our ongoing global and bespoke research to understand how trust differs across traditional news publications, social media networks, and online communities.
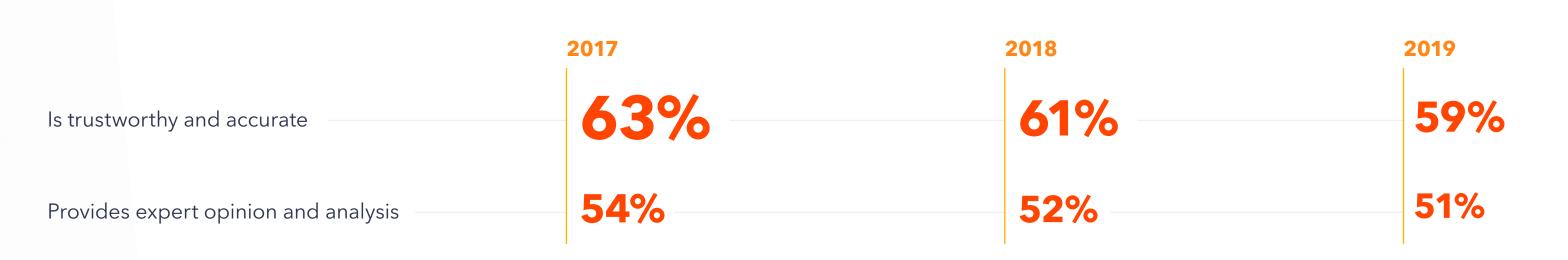
While traditional news publications are generally considered to be the most

trustworthy sources for news, trust in them has been steadily declining both globally and in the U.S. Our global data reveals that among all internet users, the number of those who perceive well-known, established media sources as "trustworthy" has declined from 63% in 2017 to 59% in 2019, while the feeling that these sources provide "expert opinion and analysis" went down from 54% to 51% over the same two years. In the U.S. specifically, trust in these sources dropped from 65% to 58% in that time period.

The number of those who perceive well-known, established media sources as "trustworthy" has declined from 63% in 2017 to 59% in 2019

THE CHALLENGE FOR TRADITIONAL NEWS
% of global internet users who associate the following qualities with major traditional news publications*

	2017	2018	2019
Is trustworthy and accurate	63%	61%	59%
Provides expert opinion and analysis	54%	52%	51%

Although trust in traditional media is declining globally, our bespoke research in the U.S. among those who are familiar with or use online community sites shows that trust in content on traditional news sources is still relatively higher compared to content on social media networks and online communities overall.

But perhaps more importantly we see that trust varies across generations, and will likely continue to change as the credibility provided by online communities becomes even more powerful, especially for younger generations. Our data shows **Gen Z in the U.S. trust community sites (48%) almost just as much as traditional news sources (51%), and notably more than social media sites (36%),** making this group a key audience for online communities.

Looking at disagreement rates, we can see **internet users overall are more decisive when it comes to which content they distrust the most, with social media (31%) topping the list, ahead of both traditional news (18%) and community sites (14%).** It's clear that users are more skeptical with content posted on social media, which leaves a gap that online community sites can fill: honest and credible information, without an agenda.

Gen Z in the U.S. trust community sites (48%) almost as much as traditional news sources (51%).

TRUST IN CONTENT ACROSS DIFFERENT CHANNELS
% of internet users in the U.S. who use/know about community sites and agree/disagree that the following sources are trustworthy

● Agree   ● Neither agree or disagree   ● Disagree

Trust content on...

Community sites
| 42% | 44% | 14% |

Social media sites
| 38% | 34% | 28% |

Traditional news sites
| 52% | 29% | 19% |

Let's get real

In the world of online communities, users are not judged based on their profile picture or how many friends they have. Anonymity, which is part and parcel to certain online communities, removes much of the pressures of perception that come with conventional social media. From our data, we've found that **most internet users in the U.S. either don't mind the anonymous nature of online communities (55%) or they think it's generally a good thing (40%).** Just 6% think it's a negative aspect.

Fundamentally, online communities foster more genuine connections around shared interests, and they level out the playing field between people. Instead of trying to be everything to everyone, online communities allow users to interact within their subculture – whether that's fashion and style fanatics, science enthusiasts, or cat lovers – and truly feel comfortable being themselves. It's a refreshing departure away from the hyper-focus on self-image that we see on social media, and it's probably the closest we have come to "realness" online. This is a sentiment that's echoed among those in the U.S. who think anonymity is a good thing. They believe people are inclined to share things they

wouldn't normally when they're anonymous (66%), are more honest online when they can be anonymous (60%), and are inclined to post positive/inspirational things when anonymous (36%).

People are inclined to share things they wouldn't normally when they're anonymous, are more honest online when they can be anonymous, and are inclined to post positive/inspirational things when anonymous.

Authenticity drives influence

Genuine connections play a key role in influencing purchase decision making. Our data shows that consumers trust the recommendations of people they are familiar with, like friends and family, or those they have a genuine bond with, such as like-minded people on online community sites, more than social media related recommendations.

When we break it down by generation, we see that Gen Z trust the recommendations on online communities more than specialist review sites; it's on a par for Millennials. Essentially, online communities overtakes expert opinion for these younger generations, which really highlights the importance and the considerable pull that online communities have for these groups.

Notably, online communities overtake specialist reviews for Gen Z, and are on a par for Millennials.

Recommendations that are often associated with social media – such as those from a vlogger, an influencer on social media, or an endorsement from a celebrity – are all less important for consumers overall, reinforcing the noticeable trust gap. Ultimately, consumers value knowledge and opinions from people they know in real life, or people they have a genuine connection with above all else.

Our data also shows that among those who follow influencers on social media, one of the most sought after qualities is trust (47%). Interestingly, a higher follower count doesn't equate to greater consumer trust, but rather the opposite. Influencer followers in the U.S. trust smaller influencers the most; 34% of them think influencers with a follower count between 1,000-10,000 are the most credible, while just 13% think influencers with over a million followers are trustworthy. From our data, we can see that influencers/celebrities simply don't match up in trustworthiness compared to other forms of recommendations.

In an industry that's plagued by influencer fraud, it's not the big-time celebrities that gain the trust of consumers, it's the more niche "micro" influencers, or everyday consumers, who show the most exciting potential. Given all this, it makes sense why consumers are turning to people they know, online communities, or expert sources more as sources of authentic recommendations.

Considering that online communities are very tight-knit groups, often sharing experiences and knowledge about a specific subject they care about, the implications for brands are significant. But what does it all mean for marketers?

TRUST IN ONLINE COMMUNITIES OVERTAKES SPECIALIST REVIEWS FOR GEN Z

% of Gen Z and Millennials in the U.S. who say they seek trustworthy product reviews from the following sources

● An online community/
forum site

● A specialist review
(e.g. from a trade magazine)

Gen Z

43%

33%

Millennials

42%

41%

05

The era of we

The brand journey

Community forums have become synonymous with trust, authenticity, and some of the most genuine personal interactions in the digital space. Undoubtedly this is a place where brands are drawn to engage consumers because of how strong the community connections are. But can they do so without the risk of co-opting a very real, creative, and equitable representation of internet culture?
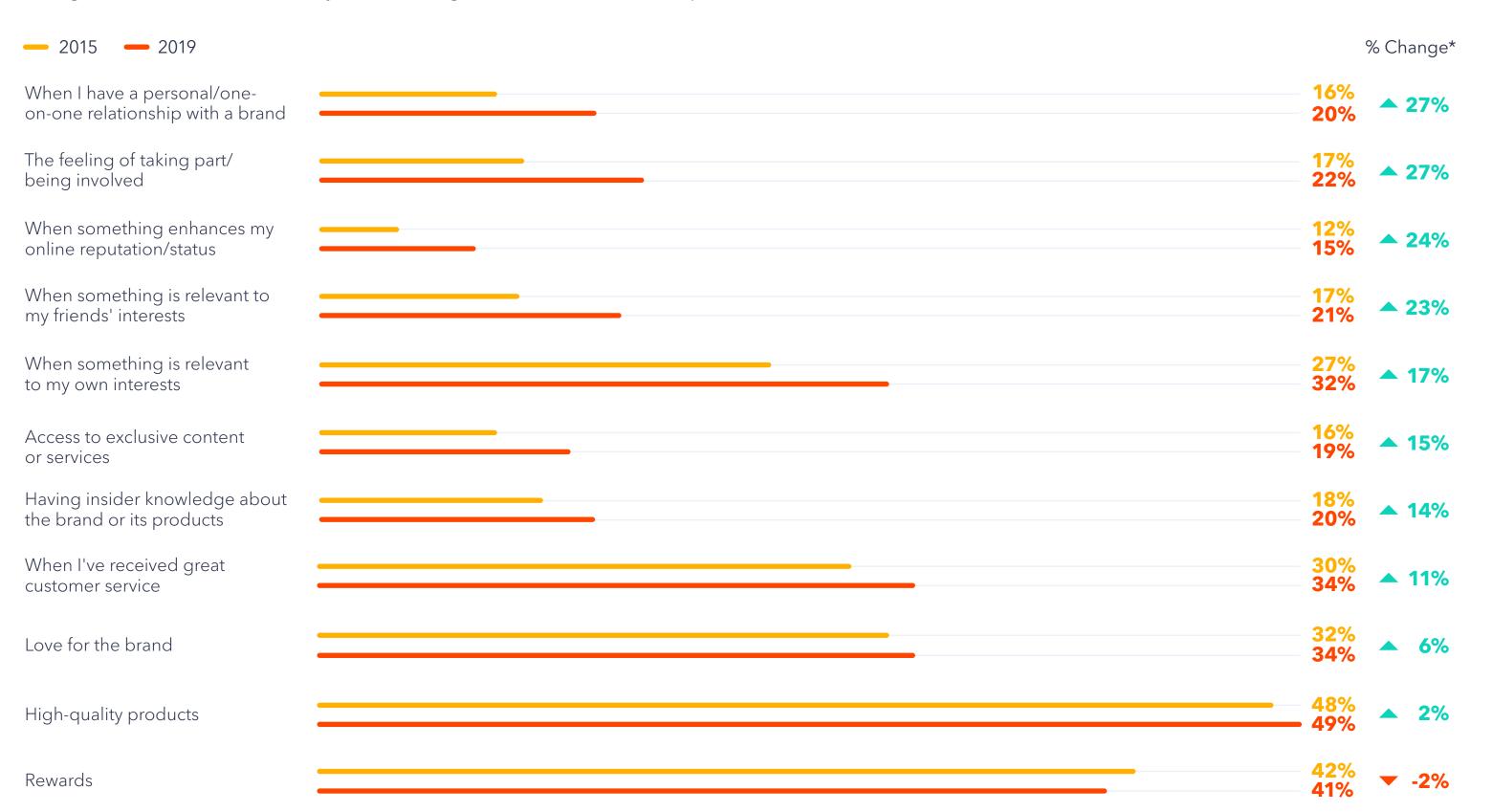
The answer is yes. Our research shows that people are not hostile toward a brand's presence on community sites. Quite the opposite, in fact **82% of community site users would be receptive toward brands participating on these sites.**

Brand relationships are wanted too

AUTHENTICITY AND INTIMACY DESIRED ACROSS THE BOARD

% of global internet users who say the following would motivate them to promote their favorite brand online

— 2015   — 2019

% Change*

	2015	2019	% Change*
When I have a personal/one-on-one relationship with a brand	16%	20%	▲ 27%
The feeling of taking part/being involved	17%	22%	▲ 27%
When something enhances my online reputation/status	12%	15%	▲ 24%
When something is relevant to my friends' interests	17%	21%	▲ 23%
When something is relevant to my own interests	27%	32%	▲ 17%
Access to exclusive content or services	16%	19%	▲ 15%
Having insider knowledge about the brand or its products	18%	20%	▲ 14%
When I've received great customer service	30%	34%	▲ 11%
Love for the brand	32%	34%	▲ 6%
High-quality products	48%	49%	▲ 2%
Rewards	42%	41%	▼ -2%

This comes as little surprise when you see how the brand-customer relationship has changed in recent years.

Since 2015, consumers have become more keen to advocate brands that make them feel involved, or let them feel like they're in a one-to-one relationship.

This is an important point; the appetite for meaningful social bonds online is bigger than just what happens between people. Brands are part of the solution in providing internet users with the authentic relationships they increasingly desire.
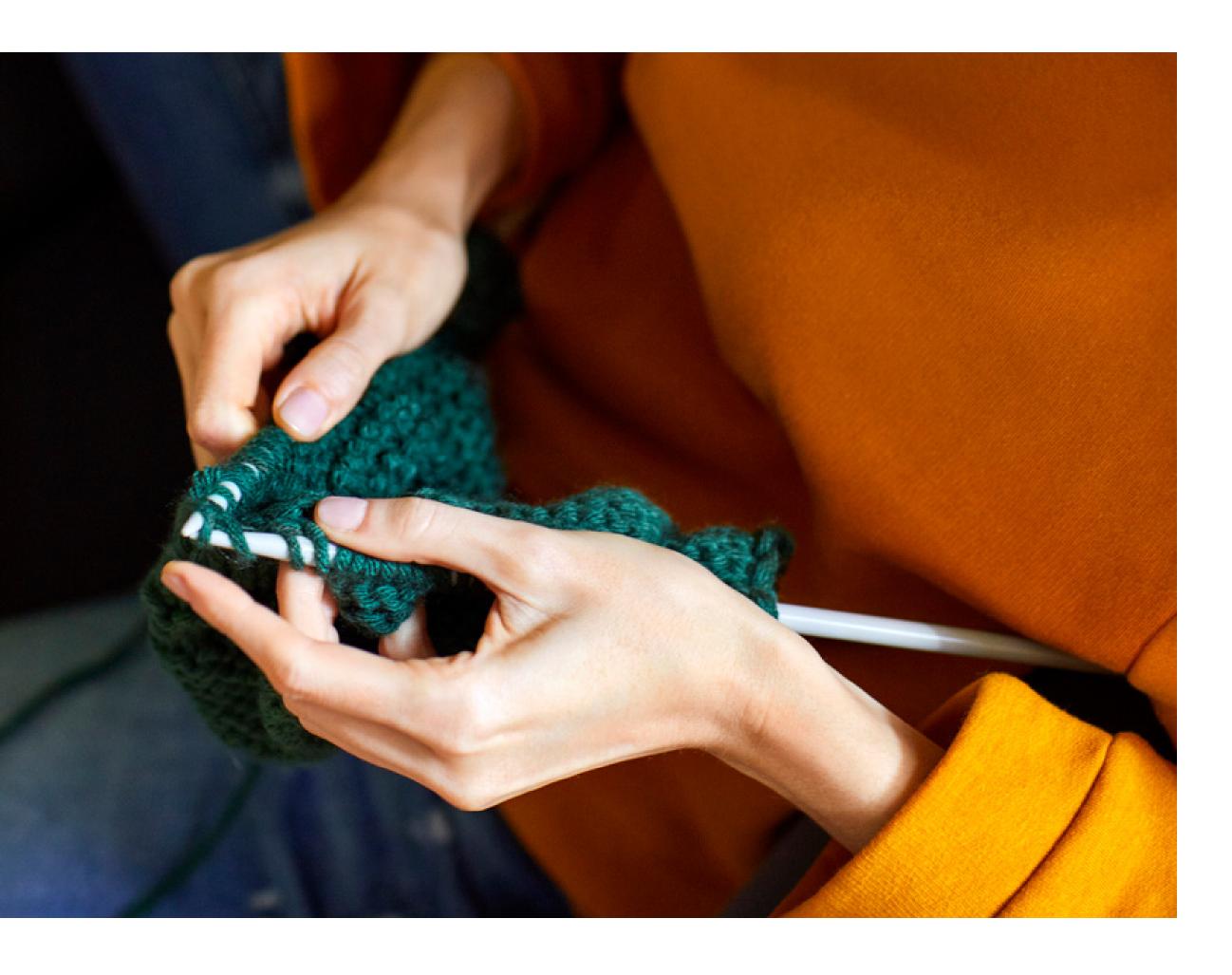
Targeting the niche

These personal relationships are likely to make an impact when dealing with niche interest groups – an area where community sites thrive. While some marketers are doubling down on mass marketing, there's a lot to be said for zeroing in on specific communities with dedicated interests. Sometimes called "micro-tribes," these are high-value consumer groups worth engaging with because they show greater brand loyalty and brand advocacy vs. the mass market.

In our global data, we track personal interest levels in 52 named topics, ranging from things as common as "eating out" to those as particular as "adventure sports." The data shows that the more niche the interest group, the more highly engaged they are in digital life.

Global consumers who are interested in the most uncommon pursuits we track, such as vegan food, urban art, and reality TV, are more likely than average to use the internet to make new connections (35%) and use social media to meet new people (29%).

These niche enthusiasts are also more inclined to want brands to run customer communities or forums, which explicitly points to how strong the link tying niche interest groups, online communities, and brand engagement opportunities really is.

It's worth mentioning, too, just how much of a long tail of subcultures are served by these spaces. In our bespoke survey, we asked community site users what topics they typically read or posted about when browsing. More "classic" interests like humor and music came out strongly for both genders. But what was striking was that "other specific interests" was so high, with over half of community site visitors, male or female, going online to read and post about more obscure interests. It's proof that **broad category labels don't always cover the sheer number of passions and interests that people seek community for online.**

TOP 5 ONLINE COMMUNITY CONTENT TOPICS BY GENDER
% of online community visitors in the U.S. who read/post about the following content

Female

1. Humor
2. Other specific interests
3. News/current events/politics
4. Food
5. Technology and gadgets

Male

1. Technology and gadgets
2. News/current events/politics
3. Humor
4. Other specific interests
5. Movies

Question: When visiting community sites, what kind of content do you typically read/post about?
Source: GlobalWebIndex November 2019
Base: 915 community site visitors in the U.S. aged 16-64

Boldness and authenticity

Throughout our exploration of online communities a few themes have repeatedly come to light, and perhaps one of the strongest of these is authenticity. In a space where users feel more comfortable being themselves than probably most other areas of the internet, it is crucial that brands respect and mirror this. A lack of authenticity is a big part of what is eating away at influencer culture, and avoiding that pitfall is especially important in the sacred space of online communities.
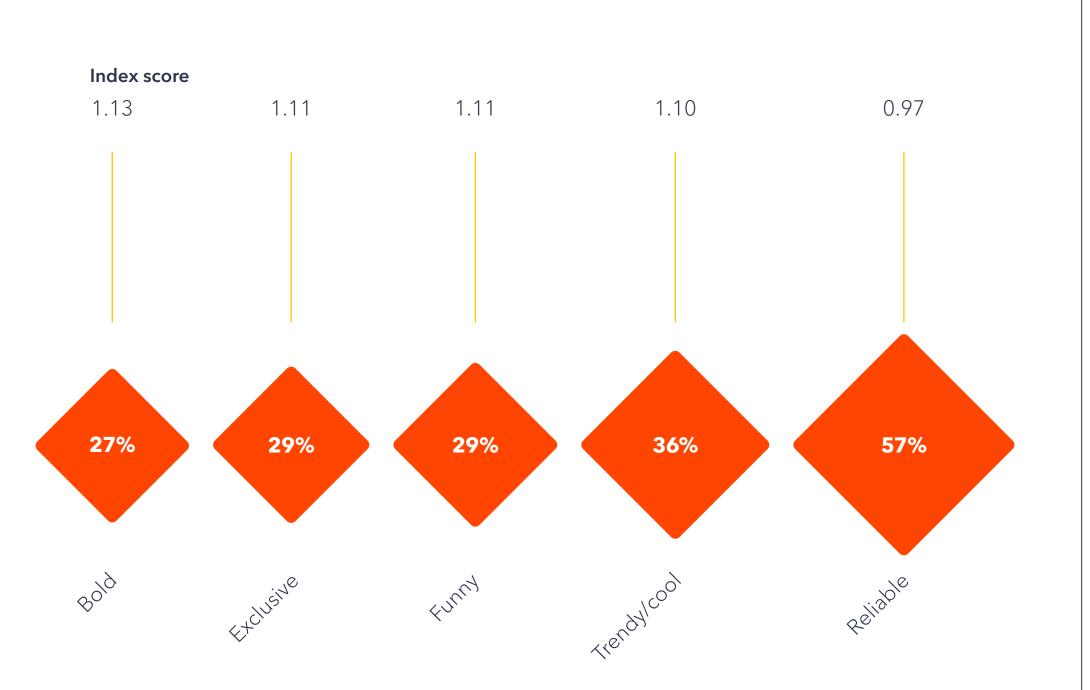
What often aligns with authenticity, especially in the realm of online communities, is the courage to be bold, offbeat, and funny. These are some of the characteristics that online community users most appreciate, over-indexing among most of them. Users also want a brand to be reliable and it's still the most sought after quality overall, however, they under-index for this compared to the average. This indicates that there is something about moving away from the safety of what's comfortable and predictable that resonates strongly with this community. Essentially, they want more from brands than just reliability, so when brands adopt a more informal personality they can build a lot of credibility in these

spaces. The challenge here, however, lies in the unknown. Being bold and authentic requires companies to relinquish some level of control, which is unknown territory when many brands seem to be tethered to a strict set of marketing guidelines around messaging, tone, and color scheme. Allowing your path to deviate from this invites a world of creative possibilities and authentic connections. And perhaps this is a step toward the future of brand engagement online, beyond communities. Allowing the consumer to be a partner in the storytelling, not just a passive listener, may be what we need to successfully engage them. And online communities might be exactly where this starts.

82% of community site users would be receptive toward brands participating on these sites.

WHAT COMMUNITY USERS WANT BRANDS TO BE
% of internet users who engage in community-oriented behaviors who want brands to exhibit the following qualities (sorted by index):

Index score

1.13	1.11	1.11	1.10	0.97
27%	29%	29%	36%	57%
Bold	Exclusive	Funny	Trendy/cool	Reliable

Bringing it together

Let's recap. As social dynamics have changed for both offline institutions and for social media, online communities have emerged to connect people with like-minded interests and experiences. Their users feel more free to act like their authentic selves, are more welcomed by other users in turn, and this drives trust and influence. These communities are particularly attractive to followers of subcultures, whose online experience as a whole is often framed by how they can connect with similar people.

Marketers have much to gain from embracing and engaging in these spaces, and the opportunity differs from mass marketing channels. Members of online communities want brands to get involved, and want to have a personal relationship with them. To succeed, adopting a more offbeat humanistic tone, championing an authentic persona, and contributing to the collective nature of community are just some of the ways marketers can take advantage of the opportunities to be found in the era of *We*.

Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

For an in-depth explanation of GlobalWebIndex's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please click here.

OUR RESEARCH

As part of our ongoing global research, each year GlobalWebIndex interviews over 575,000 internet users aged 16-64 across 46 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.
To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.
This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

SAMPLE SIZE BY MARKET

Unless otherwise stated, the data in this report is taken from a bespoke survey from **November 2019** among **2,057 internet users in the U.S.** Please note, where clearly stated, this report also draws insights from GlobalWebIndex's ongoing global research.

IMAGE CREDITS:

Cover: Mike Erskine
Contents: Wallace Chuck
p5: Asya Cvusima
p6: Victor Freitas
p11: nappy
p13: Clem Onojeghuo
p17: Elle Hughes
p20: Travis Yewell
p25: Brett Sayles

For more information please contact:

Reddit:
email: research@reddit.com
web: www.redditinc.com

GlobalWebIndex:
email: trends@globalwebindex.com
web: www.globalwebindex.com