Social media: consumer survey

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About this report

This report focuses on aspects of Analysys Mason' consumer survey that relate to smartphone users' behaviour, preferences and plans in Europe, North America, Asia, the Middle East and South Africa. It focuses on respondents' usage of social media services BeReal, Facebook, Instagram, Threads, TikTok and X.

The survey was conducted in associated with Dynata in July 2024. The survey groups were chosen to be representative of the mobile-internet-using population. We set quotes on age, gender and geographical spread to that effect. There were a minimum of 750 respondents per country.

GEOGRAPHICAL COVERAGE

Western Europe (WE):

- France
- Germany
- Ireland
- Italy
- Norway
- Spain
- Sweden
- UK

Central and Eastern Europe (CEE):

- Poland
- Turkey

Sub-Saharan Africa (SSA):

- South Africa

Emerging Asia–Pacific (EMAP):

- Malaysia

North America (NA):

- Canada
- USA

Developed Asia-Pacific (DVAP):

- Australia
- New Zealand

Middle East and North Africa (MENA):

- Saudi Arabia
- UAE

KEY QUESTIONS ANSWERED IN THIS REPORT

- Which social media services are used the most within each age and gender category?
- How does social media usage vary by region?
- Are consumers interested in paying for premium social media accounts?
- How successful is X Premium in each country and age group?

WHO SHOULD READ THIS REPORT

- Strategy teams in telecoms operators that are interested in the take-up of social media services.
- Strategy teams in social media companies that are interested in the relative performance of different services.
- Other parties that are interested in social media usage, including regulators, governments, vendors, advertisers and developers.

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Meta continues to dominate the social media market via Facebook and Instagram. However, Threads is yet to reach double-digital penetration, despite its initial popularity and the decline of X (formerly Twitter).

Age is one of the best predictors of social media usage; 18–24-year-olds have the highest usage and those aged 65 and over have the lowest.

Facebook has over 50% penetration among all age groups; its peak appeal is among respondents aged 35–44.

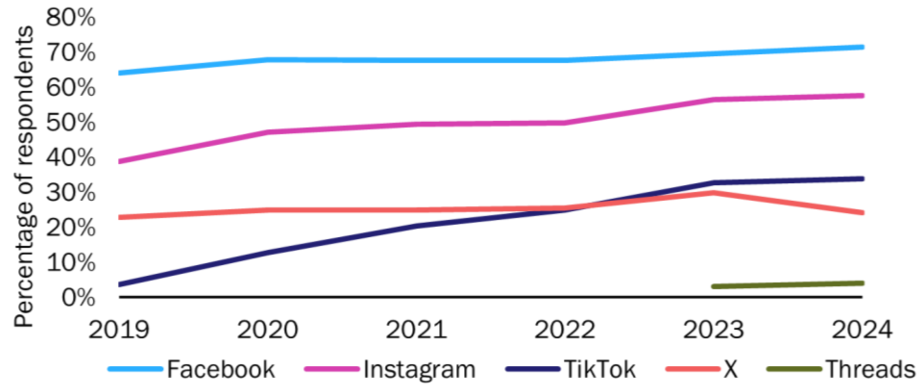
The use of X (formerly Twitter) has sharply declined in almost every country surveyed. This fall in penetration has been driven by younger people leaving the platform. Indeed, the number of 18–24-year-old X users has decreased by 25% since 2023, while that of 55–64-year-old X users has fallen by just 1%.

X Premium has had some success in countries such as the UAE (26% of X users have purchased the premium service). However, only 8% of all X users pay for X Premium.

Threads gained 100 million users within its first 5 days of operation, but this success has not been sustained. Nonetheless, its penetration across our entire panel grew by 0.9 percentage points (pp) year-on-year in 2024.

The growth in TikTok's penetration comes from people aged over 25; its penetration among 18–24-year-olds remained unchanged year-on-year.

Figure 1: Penetration of social media services, total panel



Source: Analysys Mason

Figure 2: Penetration of social media services, by platform and region, 2024

	Facebook	Instagram	X	TikTok	Threads
WE	65%	52%	18%	25%	4%
CEE	74%	62%	34%	31%	2%
NA	64%	47%	21%	22%	5%
EMAP	84%	69%	35%	60%	8%
DVAP	71%	45%	12%	22%	2%
SSA	82%	61%	29%	59%	4%
MENA	70%	76%	29%	54%	N/A

Source: Analysys Mason

Key findings

1

There has been little-to-no change in the penetration of Facebook, Instagram and TikTok among 18–24-year-olds since 2023, but the number of 18–24-year-old X users has fallen significantly.

The penetration of Facebook and TikTok among users aged 18–24 has remained at 57% and 53%, respectively, whereas that of Instagram has increased by 1pp year-on-year to 73%. The penetration of these platforms among the entire survey panel has risen year-on-year due to increased interest from respondents aged 25 and over (55 and over for Facebook). 25% of 18–24-year-old X users left the app in 2024, as did 13% of 25–34-year-old users.

2

Meta dominates the social media space; Facebook and Instagram are the most popular social media platforms in every country surveyed, though Threads has yet to reach double-digit penetration anywhere.

Facebook is the most popular social media platform in 16 of the 18 countries surveyed; Instagram leads in the other 2 (Turkey and Saudi Arabia). The second-most popular app has a significant lead over the third-most popular app in most countries. Threads has yet to onboard many of the 18–24-year-olds that have left X. Threads's highest penetration is in Malaysia (8%).

3

8% of all X users pay for X Premium; it is the most popular among younger users in Malaysia and the UAE.

X Premium offers a comprehensive suite of features and is available at three price points. Its services are differentiated depending on whether a user wants to have an enhanced experience or to be a content creator. X Premium is the most popular among people aged 18–24 (13% of users in this age group pay for the service). This is a concern for X because this is also the group that is most rapidly abandoning the platform.

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Women tend to use more social media platforms than men, but men are more likely to use microblogging platforms

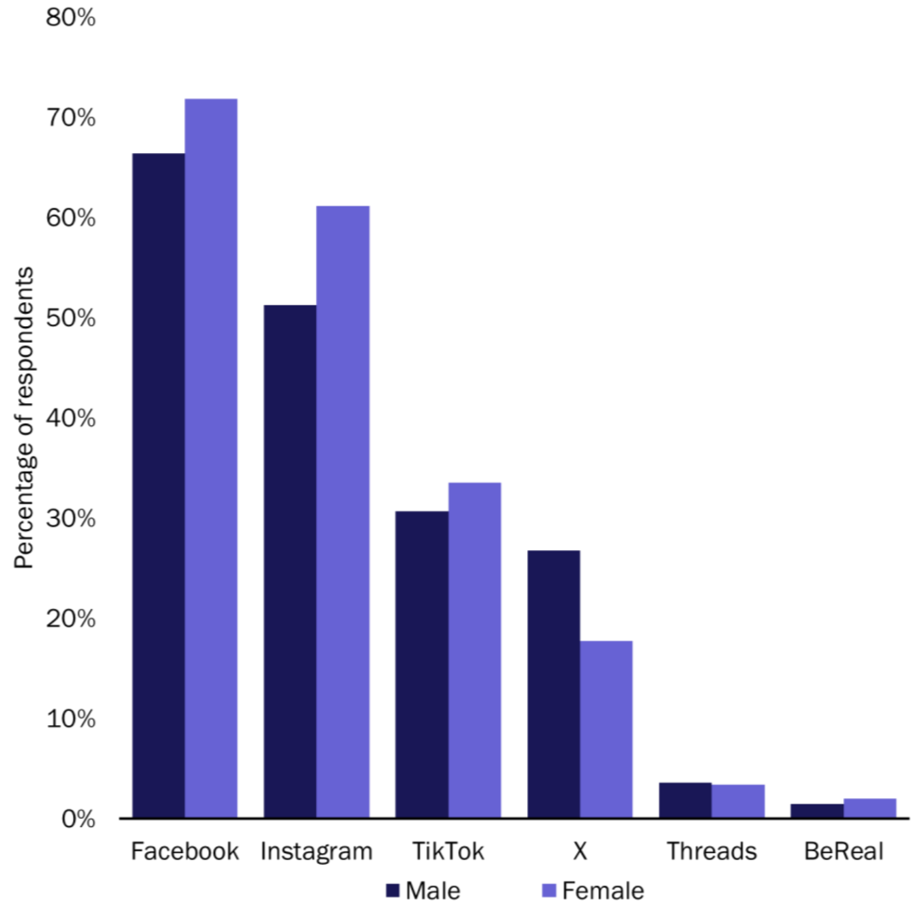
84% of the women in our panel use Facebook, Instagram, TikTok or X, compared to 79% of all men in the sample.

Men use an average of 1.8 social media accounts, while women use 1.9. This is unchanged from last year.

Facebook is more popular with women than men in every country surveyed, apart from Saudi Arabia, Turkey and the UAE. Instagram and TikTok are more popular with women in every country surveyed, while X is more popular with men everywhere except Saudi Arabia.

Threads (Meta's microblogging platform) had a similar demographic profile to X in 2023. This changed in 2024; the popularity of Threads among women increased. Instagram started to integrate a Threads API in late 2023 to show Instagram users Threads posts. This may have caused the increased adoption of Threads among women because Instagram appeals more strongly to women than men.

Figure 3: Penetration of social media services, by gender, total panel, 2024



Source: Analysys Mason

The penetration among 18–24-year-olds has not changed year-on-year for Facebook and TikTok, but it has increased by 1pp for Instagram and decreased by 9pp for X

The fall in the penetration of X has been caused by younger groups leaving the platform.

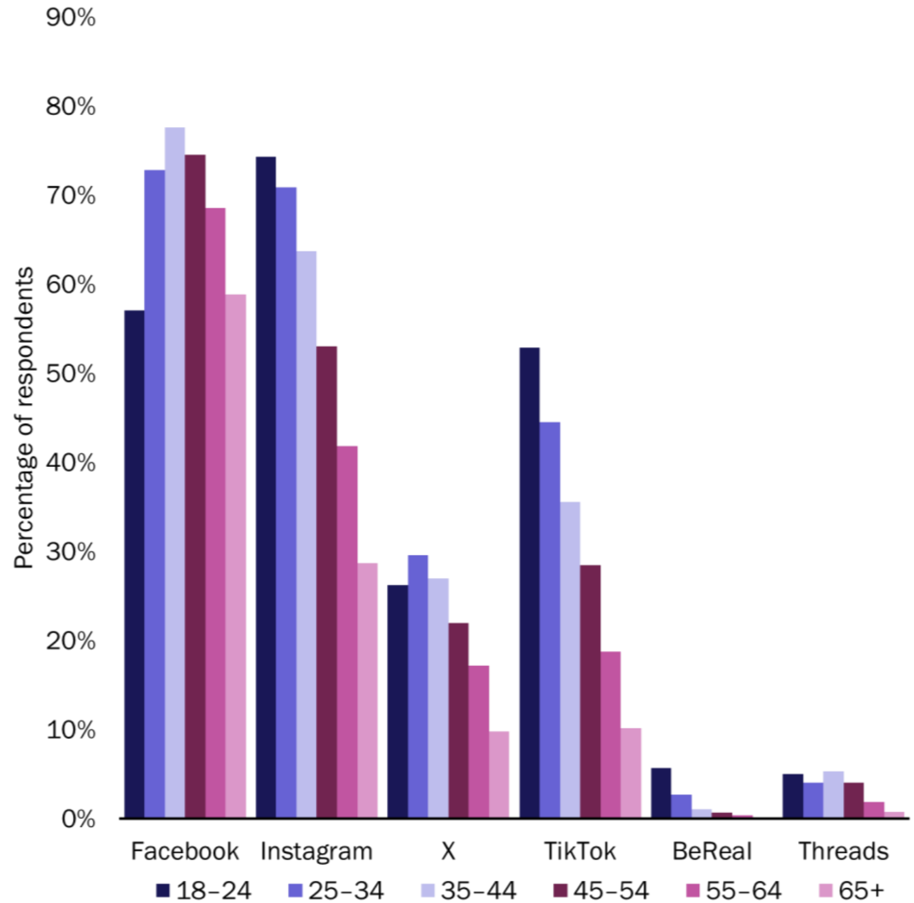
Facebook's penetration among people aged 18–54 has remained mostly unchanged year-on-year. However, the platform's penetration among 55–64-year-olds and users over 65 has increased by 5pp and 6pp, respectively.

Instagram's penetration has risen the most among older groups. Indeed, it has increased by 1pp among 18–24-year-olds, 2pp among 25–34-year-olds and 6pp among respondents over 35.

The 6pp fall in penetration for X has been caused by younger people leaving the platform. Indeed, X's penetration has fallen by 9pp, 4pp, 2pp and 1pp among 18–24-year-olds, 25–34-year-olds, 35–44-year-olds and 45–54-year-olds, respectively. It has remained unchanged among respondents aged 55–64.[1]

TikTok's penetration among people aged 18–24 has remained unchanged at 53% since 2023. However, its penetration has increased by 3–8pp for every other age group. TikTok has matured away from dancing videos to offer short-form insights, tutorials and reviews on almost every topic. The diversification of content and subsequent change to its reputation are probably the reasons for the increased appeal among people aged 25 and over.

Figure 4: Penetration of social media services, by age, total panel, 2024



Source: Analysys Mason

[1] For every 100 X users in each age group (18–24, 25–34, 35–44, 45–54, 55–64 and 65+) in 2023, there are now 75, 87, 93, 99 and 93 users, respectively.

Meta dominates the social media market; Facebook and Instagram are the two most popular platforms in every country surveyed

X was more popular than TikTok in eight countries in 2023; it is now only more popular in the UK and Turkey.

The most popular social media service has remained largely unchanged since 2023 in all countries surveyed. The UAE is the only exception; Instagram was the most popular service in 2023, but Facebook has since taken the lead. The worldwide penetration of both Facebook and Instagram has increased by 2pp year-on-year.

TikTok has overtaken X in terms of popularity in almost all countries surveyed. The UK is an exception, though X's lead is less than 1pp.

Controversial comments and commercial changes made by X's owner, Elon Musk, have resulted in a decline in the size of its user base in almost every country surveyed.[1]

Meta's Threads has yet to fulfil its potential to attract former X users in most countries. Indeed, X's penetration has declined by 5pp year-on-year, but Threads's penetration has increased by just 0.9pp.

Figure 5: Rankings for the top four social media services, by country, 2024

	First	Second	Third	Fourth
France	Facebook	Instagram	TikTok	X
Germany	Facebook	Instagram	TikTok	X
Ireland	Facebook	Instagram	TikTok	X
Italy	Facebook	Instagram	TikTok	X
Norway	Facebook	Instagram	TikTok	X
Spain	Facebook	Instagram	TikTok	X
Sweden	Facebook	Instagram	TikTok	X
UK	Facebook	Instagram	X	TikTok
Poland	Facebook	Instagram	TikTok	X
Turkey	Instagram	Facebook	X	TikTok
Canada	Facebook	Instagram	TikTok	X
USA	Facebook	Instagram	TikTok	X
Australia	Facebook	Instagram	TikTok	X
New Zealand	Facebook	Instagram	TikTok	X
Malaysia	Facebook	Instagram	TikTok	X
South Africa	Facebook	Instagram	TikTok	X
UAE	Facebook	Instagram	TikTok	X
Saudi Arabia	Instagram	Facebook	TikTok	X

Source: Analysys Mason

[1] X's penetration in the USA has remained unchanged year-on-year. However, it fell significantly year-on-year in 2023 (by 4pp).

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Premium tiers are not popular among most consumers, but this may represent an opportunity for operators

Several major communication platforms are moving towards a two-tier system, rather than relying on advertising revenue or business messaging.

Third-party communication apps are introducing premium subscription tiers such as Snapchat Plus and Telegram Premium. However, most consumers are hesitant to pay for such services. Operators could partner with these platform providers to offer access to their premium tiers as a value-added service on premium mobile contracts.

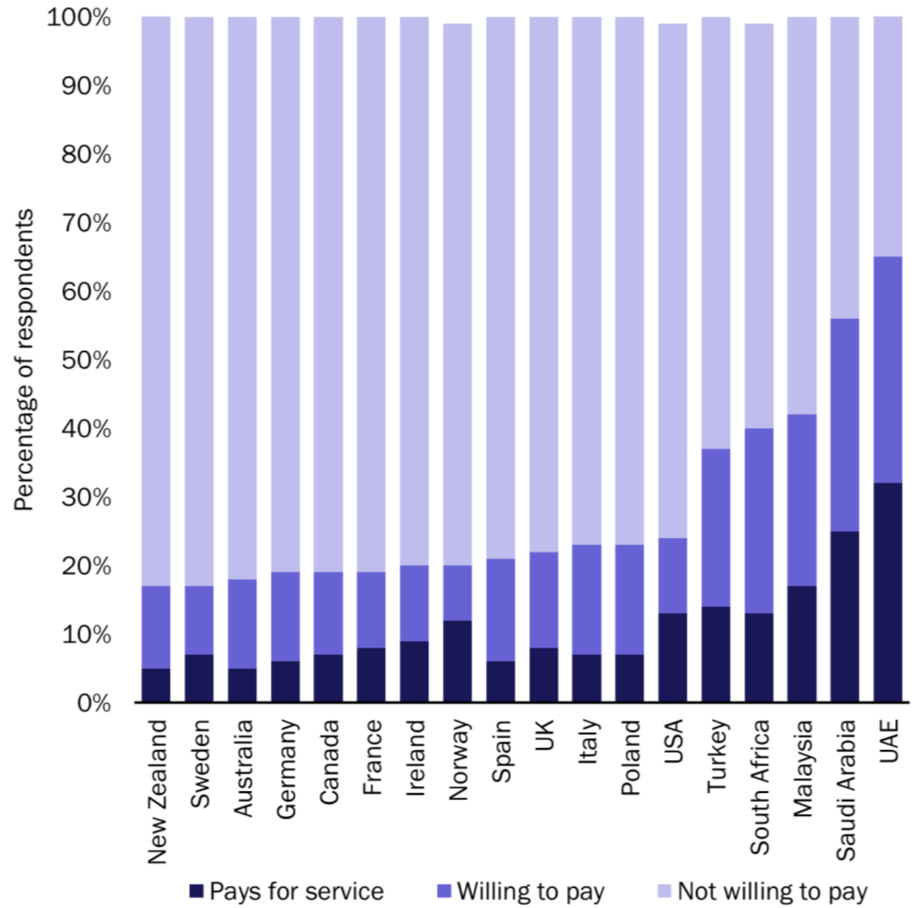
Younger groups reported being more likely to pay for premium communication app tiers than their older counterparts (26% of 18–24-year-olds versus 6% of over 65s).

Furthermore, men are more likely to pay for premium services than women (19% and 15%, respectively).

People living in urban areas were nearly twice as likely to say that they would be willing to pay for these services (20%) than people living in rural areas (11%).

Household income has a minimal effect on whether people are willing to pay for these services. 16% of people in low-income households said that they would, compared with 17% of people in high-income households.

Figure 6: Willingness to pay for a premium messaging or social media service, by country, 2024



Source: Analysys Mason

8% of all X users pay for its premium service; its penetration is the highest in the UAE

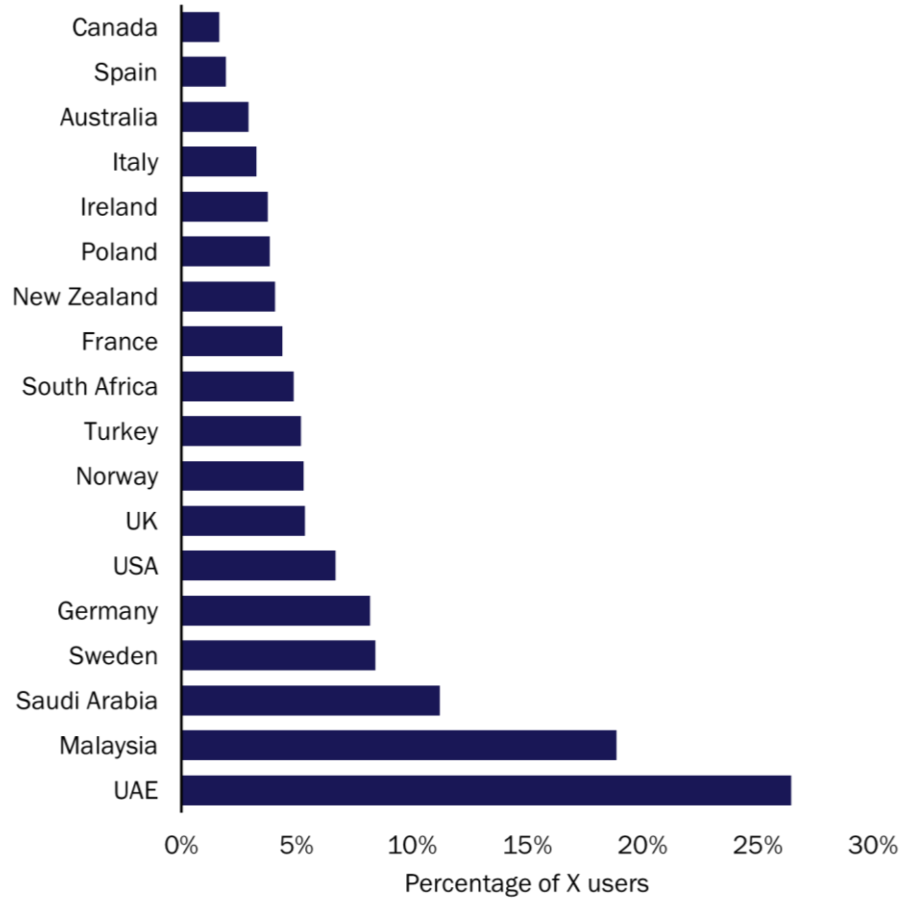
There are three tiers for X Premium, which are clearly distinguished through features such as longer posts, data analytics, creator tiers, X's generative AI model and ad removal.

X offers three tiers for its premium service: basic, premium and premium+. They cost USD3, USD8 and USD16 per month, respectively.[1,2]

- The basic tier offers post editing, prioritised replies, longer posts and longer video uploads. It also offers greater customisation than the free version.
- The premium tier offers all the 'basic' features, plus a blue tick, reduced ads, the ability to apply for ad revenue sharing and creator subscriptions, ID verification, more strongly prioritised replies, analytics and access to Grok (X's large-language model).[3]
- The premium+ tier offers all the 'premium' features plus even more strongly prioritised replies and no ads.

The proportion of users that pay for the premium service for X in Germany, Malaysia, South Africa and the UAE is higher than that for Snapchat or Telegram. However, Snapchat Plus is the most popular premium service (in terms of the share of all users that pay for the service) across the total survey panel, followed by X Premium and then Telegram Premium.

Figure 7: Percentage of X users that pay for X Premium, by country, 2024



Source: Analysys Mason

[1] These are the web prices in the USA. X, *Pricing*.
[2] Our survey did not identify which tier of premium service a user subscribed to.
[3] A large-language model (LLM) is a type of generative AI; ChatGPT is an example of an LLM.

Younger people are the most likely to pay for X Premium; this poses challenges for X's commercial model

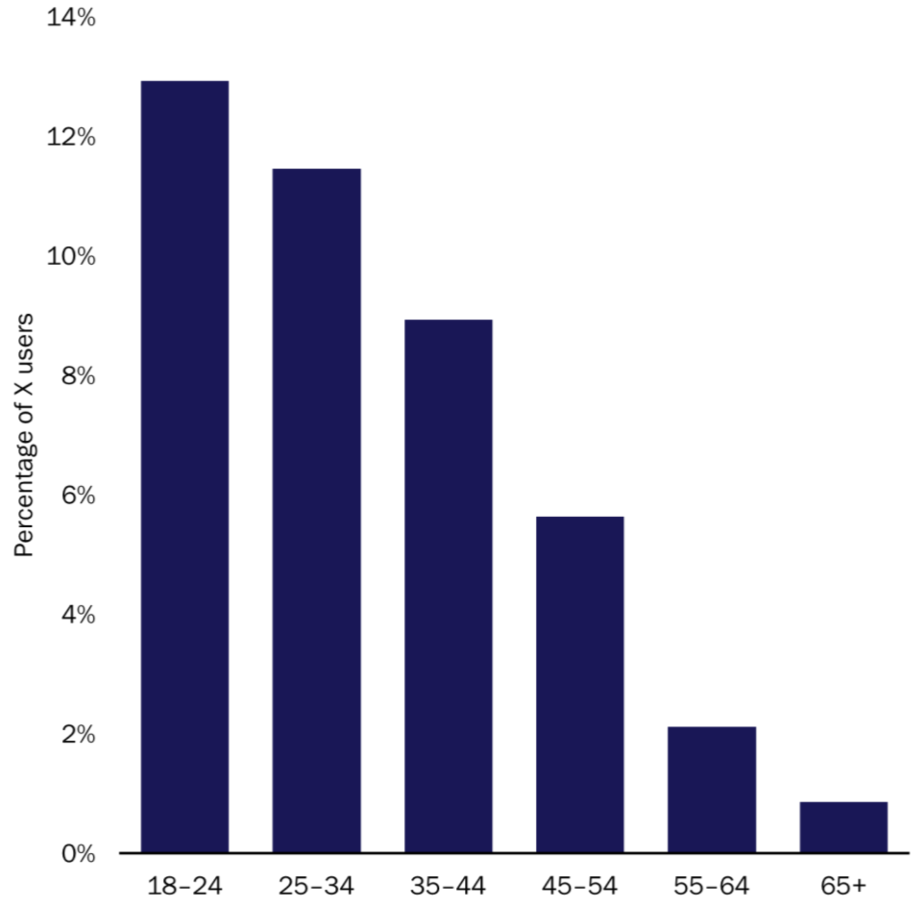
X is alienating the demographic that is the most likely to pay for its premium service.

X had more users in the 18–24-year-old age group than any other group in 2023. However, there are now more users aged 25–34. This is a problem for X because 18–24-year-olds are the most likely to pay for X Premium.

There are some exceptions to this trend. 25–34-year-olds are the most likely to pay for X Premium in Malaysia. Malaysia also has the second-highest penetration of the premium service among X users.

18–24-year-olds in the USA are less likely to pay for X Premium than any other group aged under 55. Indeed, only 3% of users aged 18–24 pay for X Premium, compared to 10% of users aged 25–34, 14% aged 35–44 and 5% aged 45–54.

Figure 8: Percentage of X users that pay for X Premium, by age, total panel, 2024



Source: Analysys Mason

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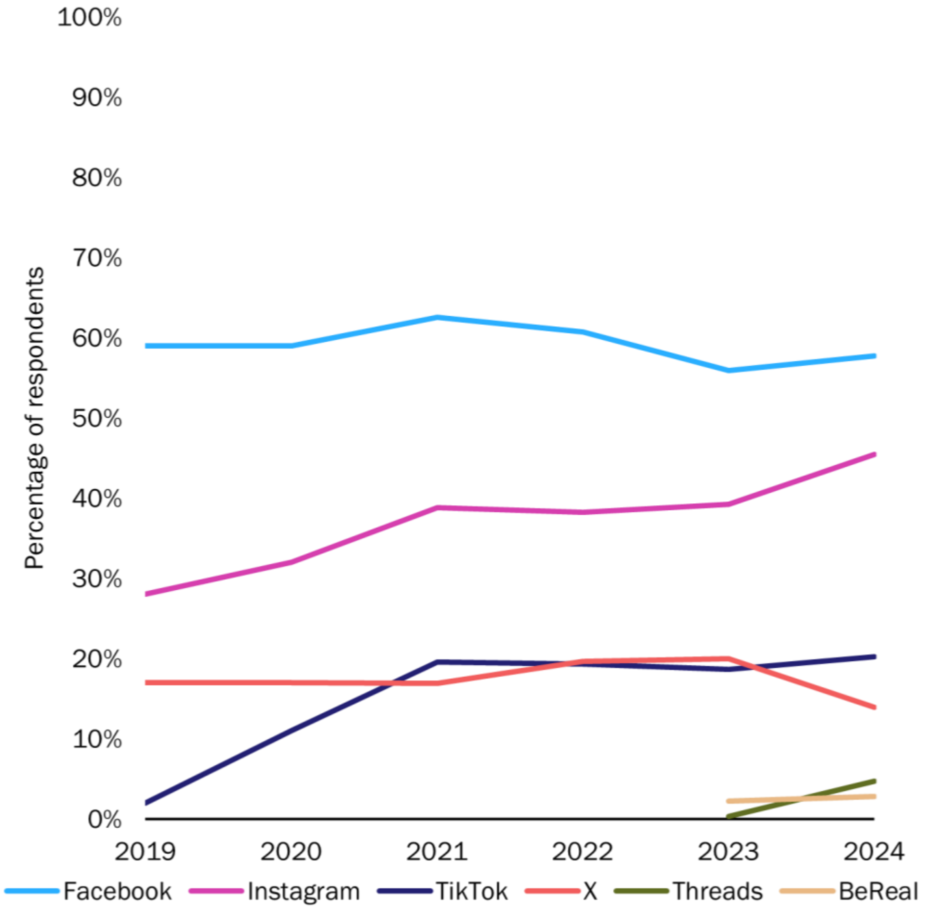
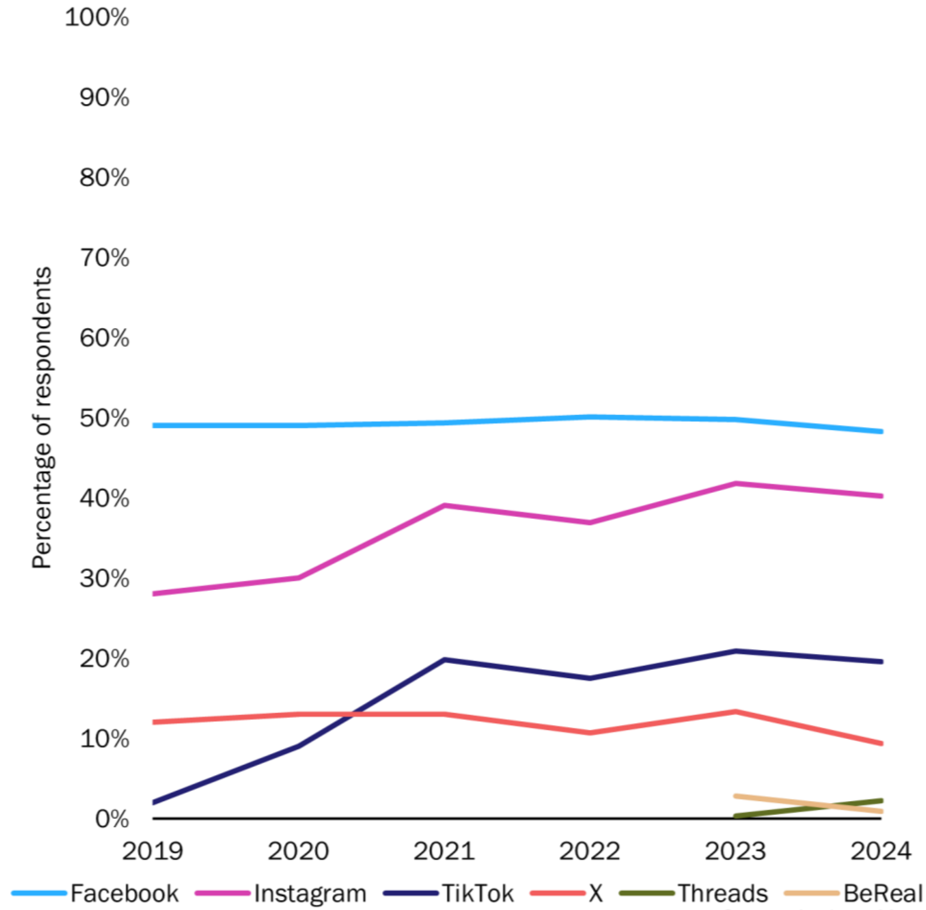
Facebook is the clear market leader in both France and Germany

Figure 9: Penetration of social media services, France



Source: Analysys Mason

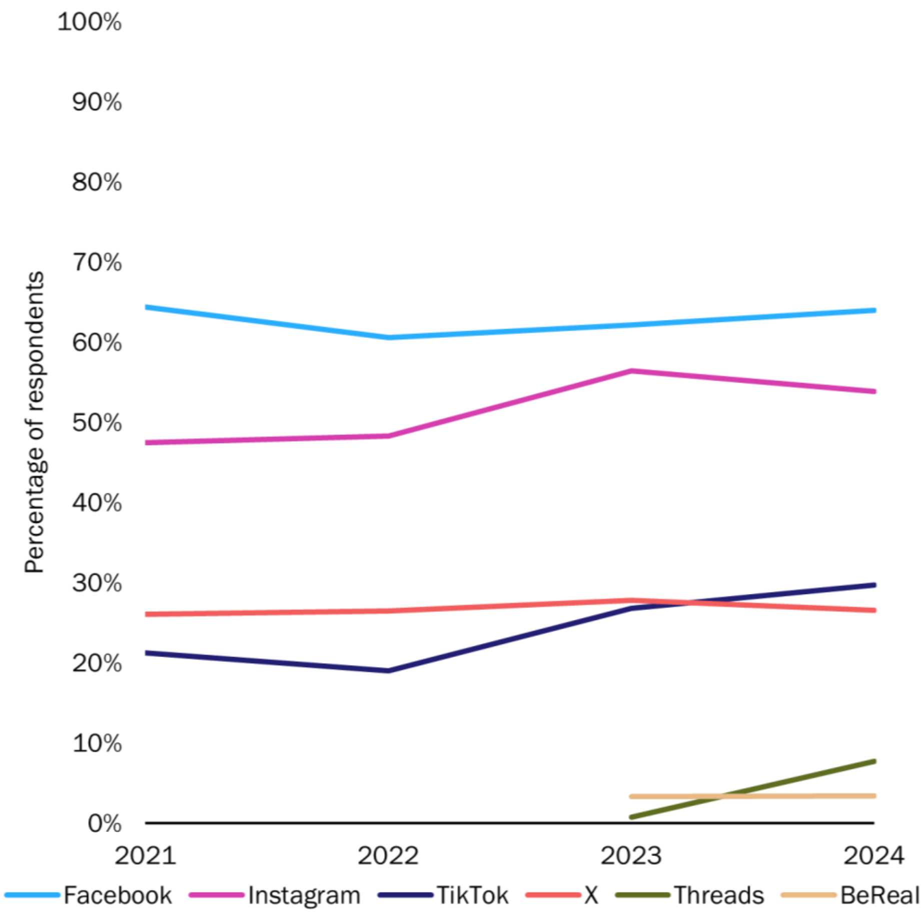
Figure 10: Penetration of social media services, Germany



Source: Analysys Mason

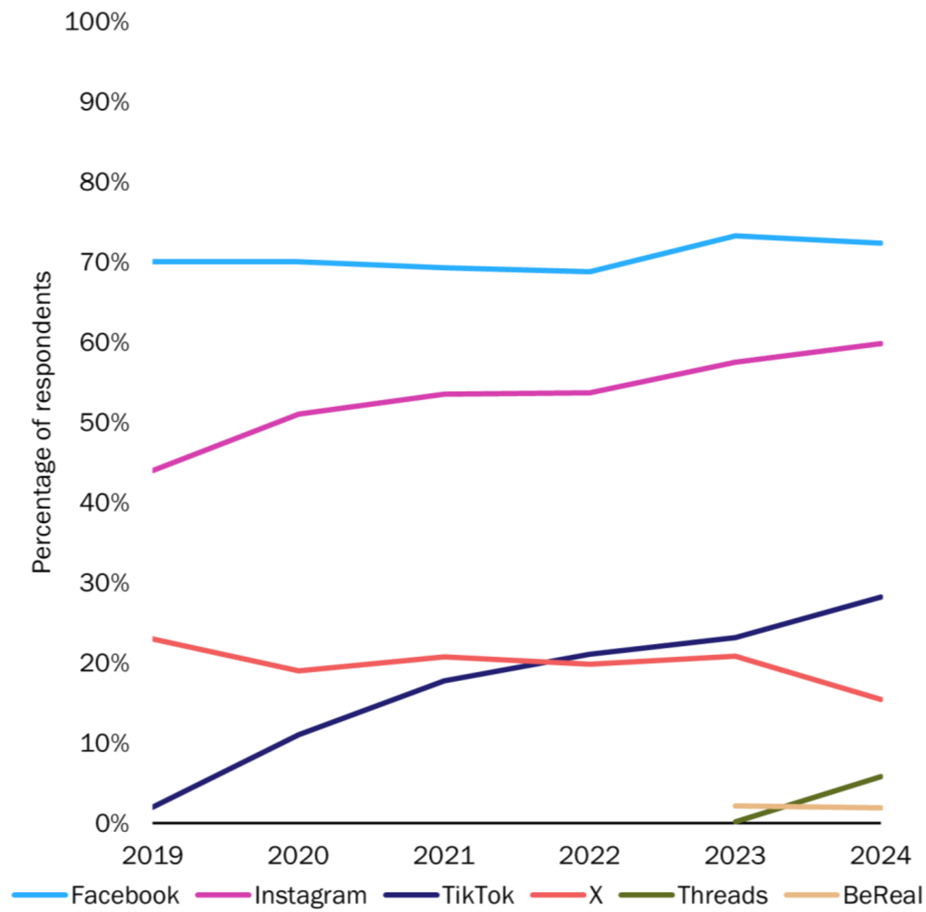
The penetration of Instagram is growing consistently in Italy, but Facebook remains the most popular platform, as it does in Ireland

Figure 11: Penetration of social media services, Ireland



Source: Analysys Mason

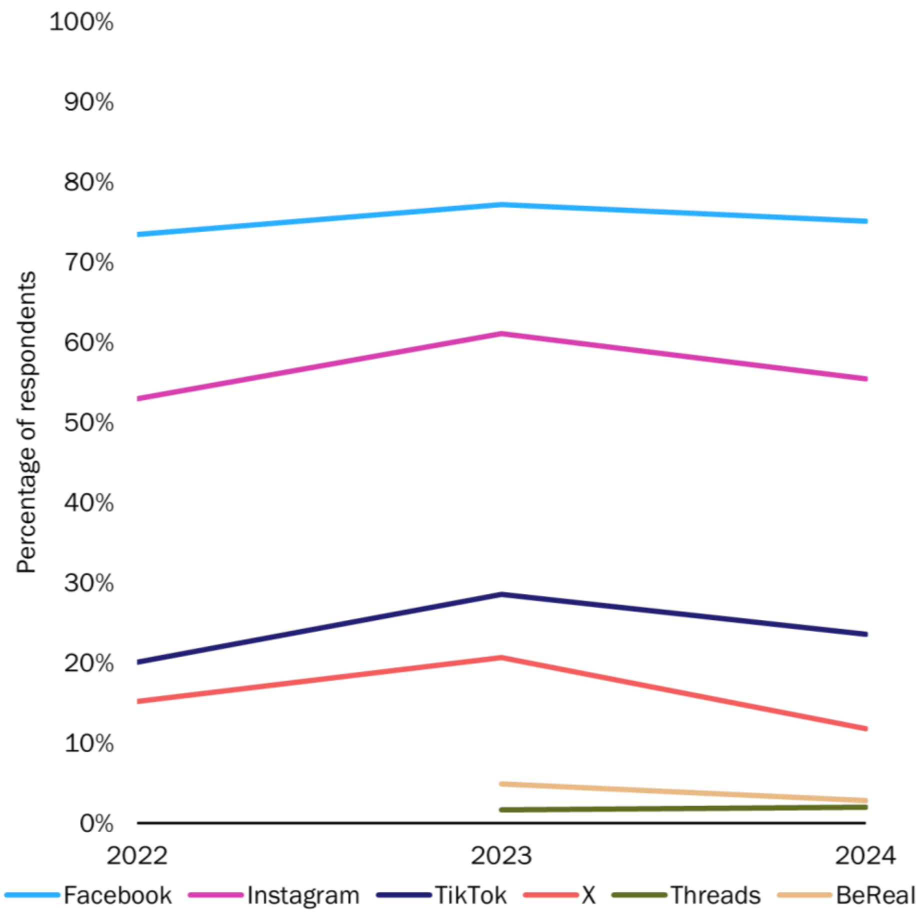
Figure 12: Penetration of social media services, Italy



Source: Analysys Mason

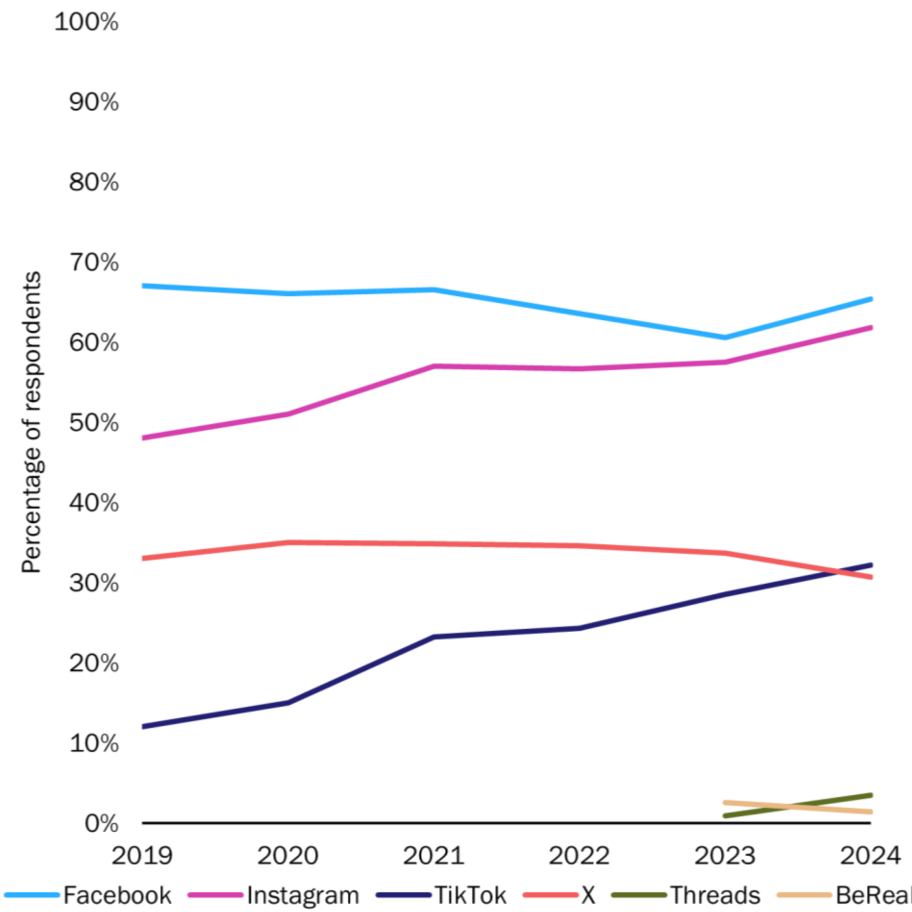
TikTok overtook X to become the third-most popular platform in Spain in 2024

Figure 13: Penetration of social media services, Norway



Source: Analysys Mason

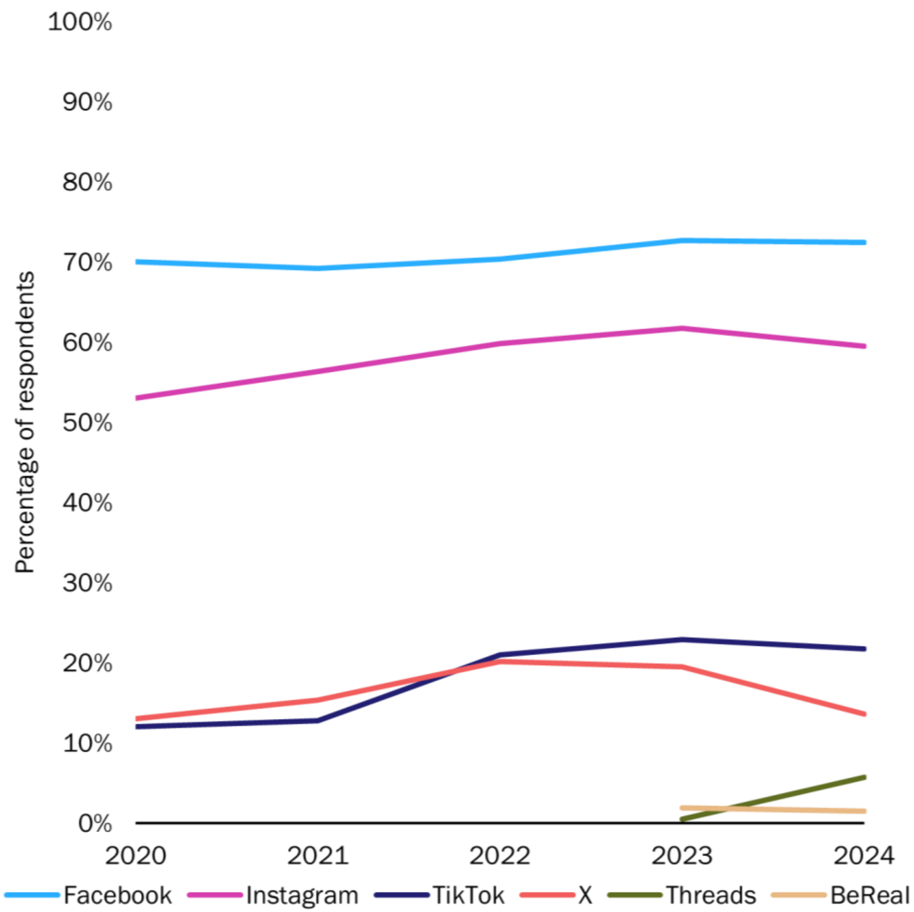
Figure 14: Penetration of social media services, Spain



Source: Analysys Mason

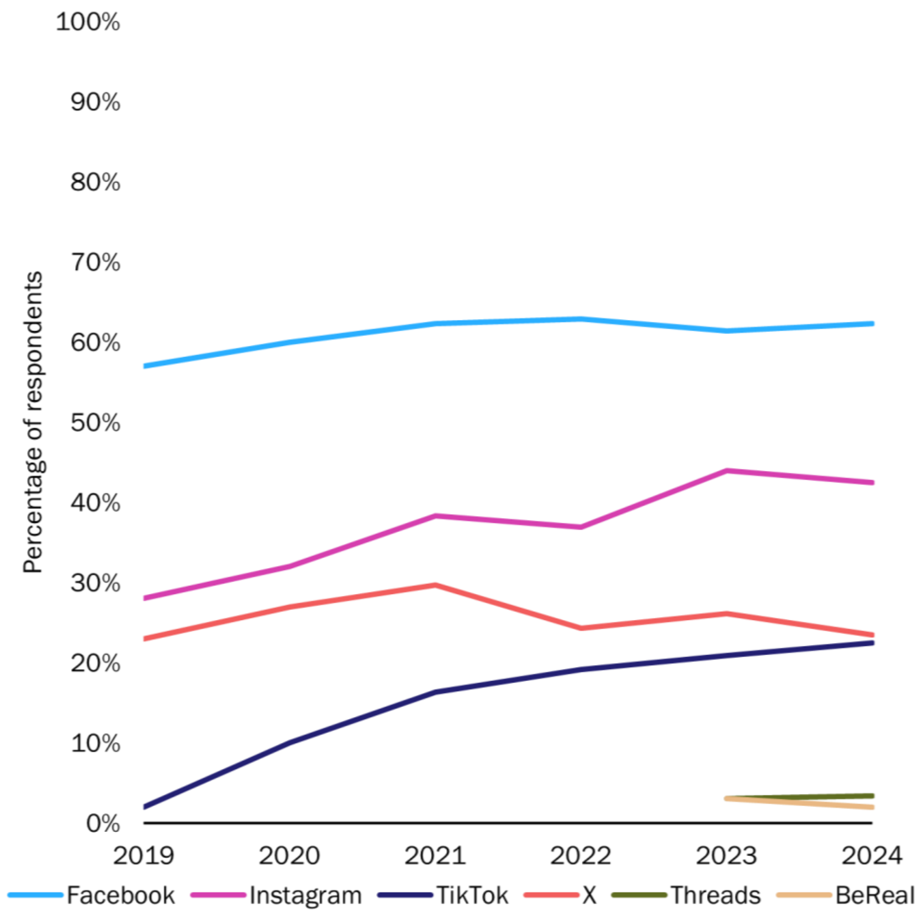
The penetration of TikTok continues to grow steadily in the UK

Figure 15: Penetration of social media services, Sweden



Source: Analysys Mason

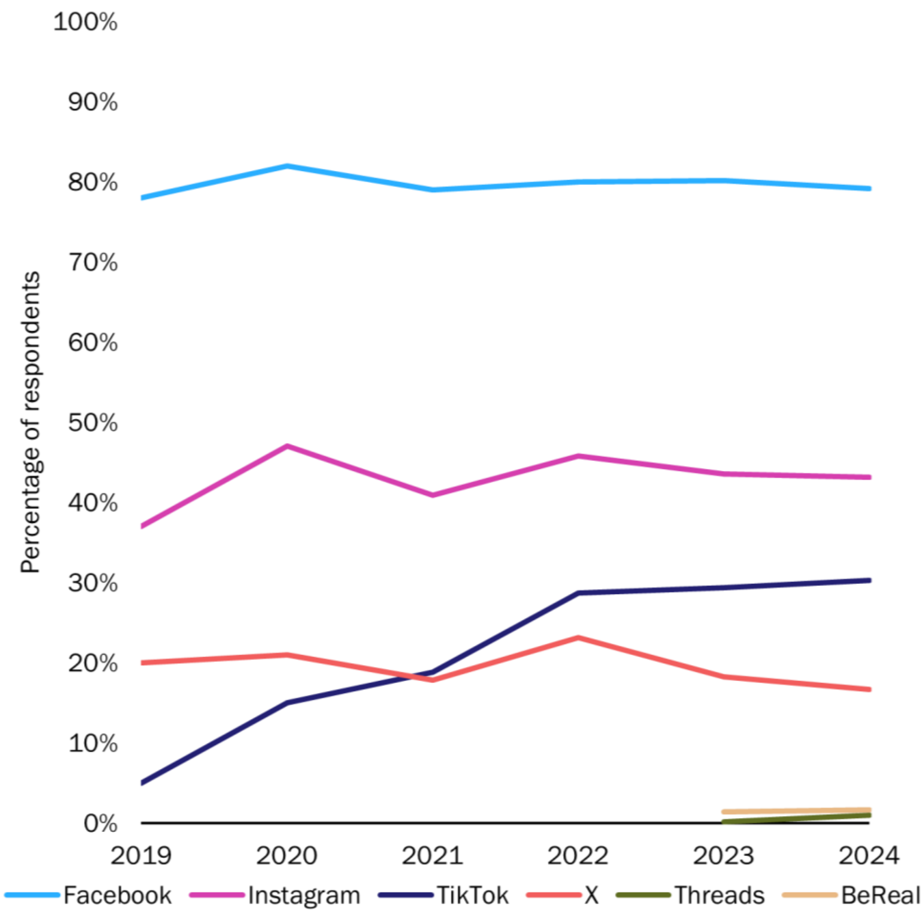
Figure 16: Penetration of social media services, UK



Source: Analysys Mason

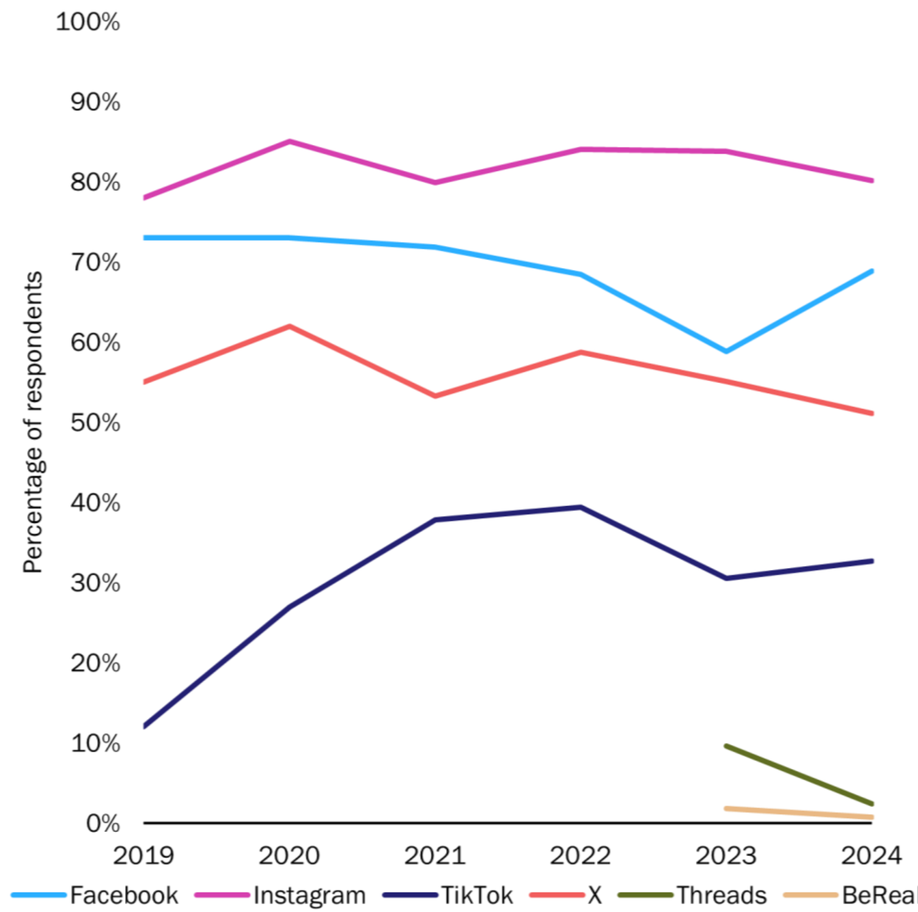
All social media platforms are more popular in Turkey than in Poland, apart from Facebook

Figure 17: Penetration of social media services, Poland



Source: Analysys Mason

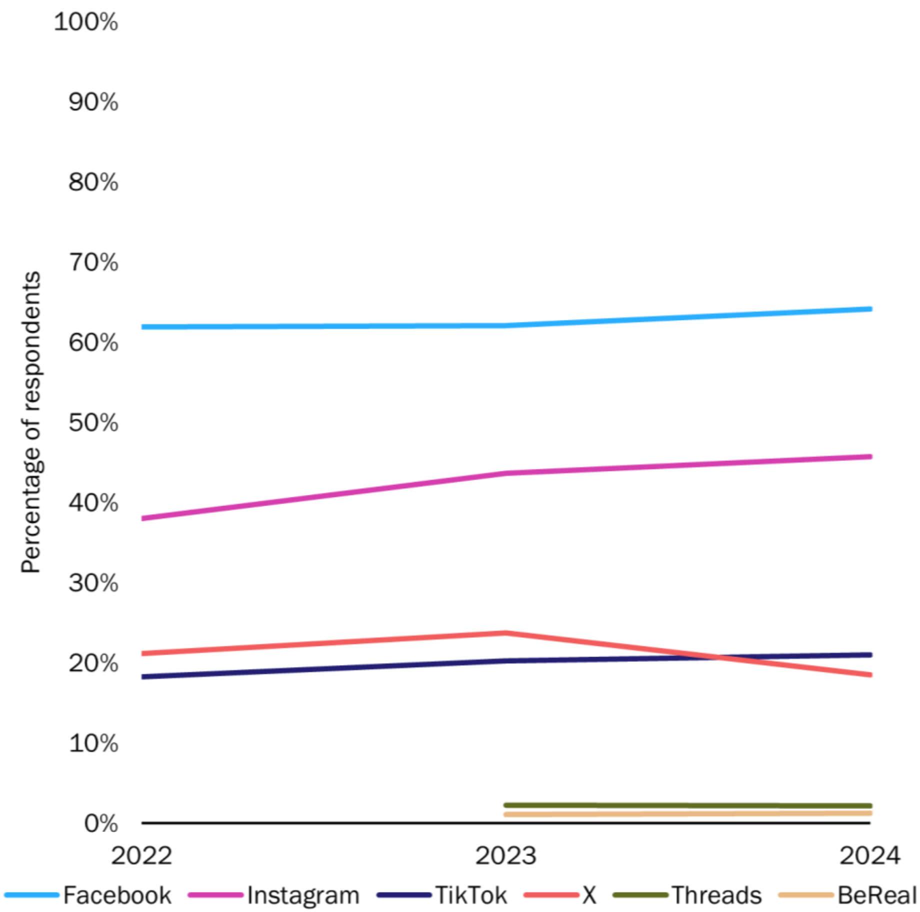
Figure 18: Penetration of social media services, Turkey



Source: Analysys Mason

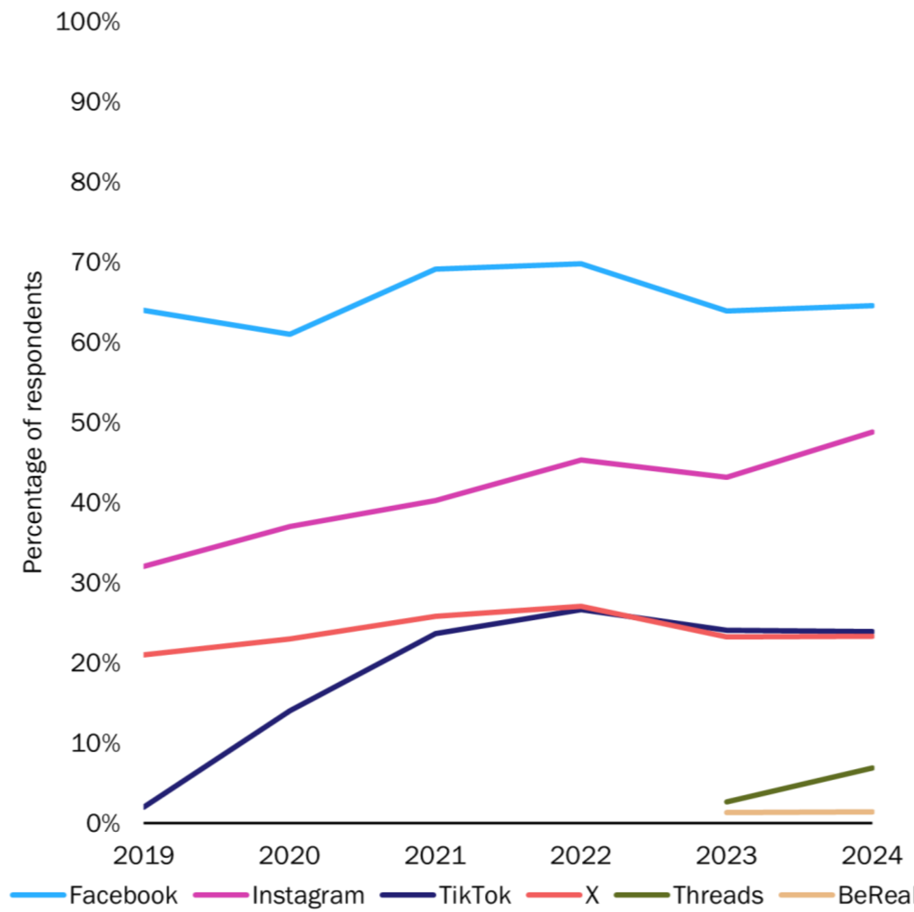
The penetration of all social media platforms in Canada is similar to that in the USA

Figure 19: Penetration of social media services, Canada



Source: Analysys Mason

Figure 20: Penetration of social media services, USA



Source: Analysys Mason

Facebook and Instagram continue to grow in popularity in both Australia and New Zealand

Figure 21: Penetration of social media services, Australia

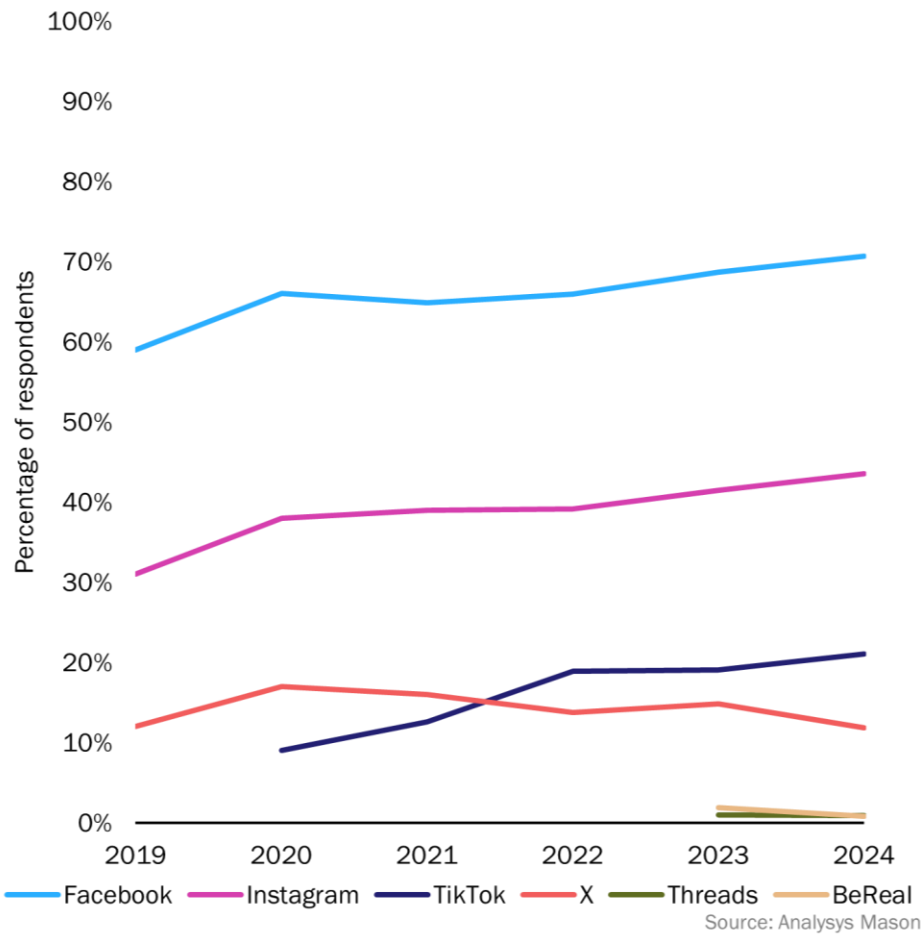
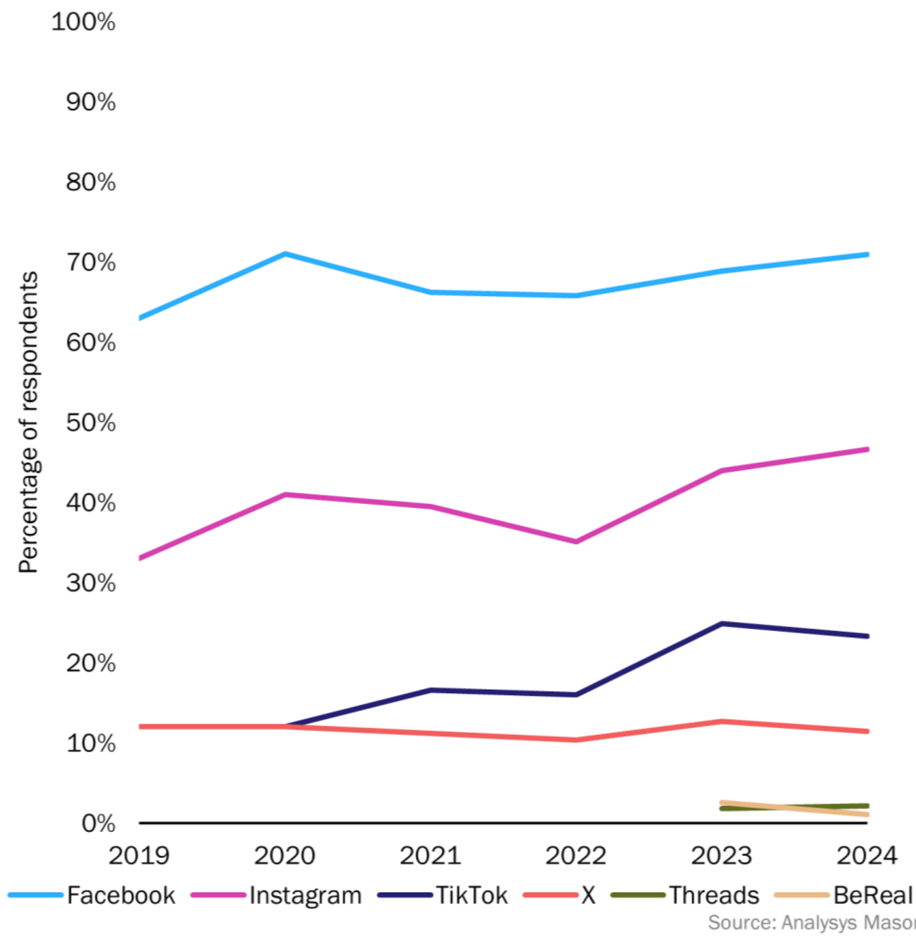


Figure 22: Penetration of social media services, New Zealand



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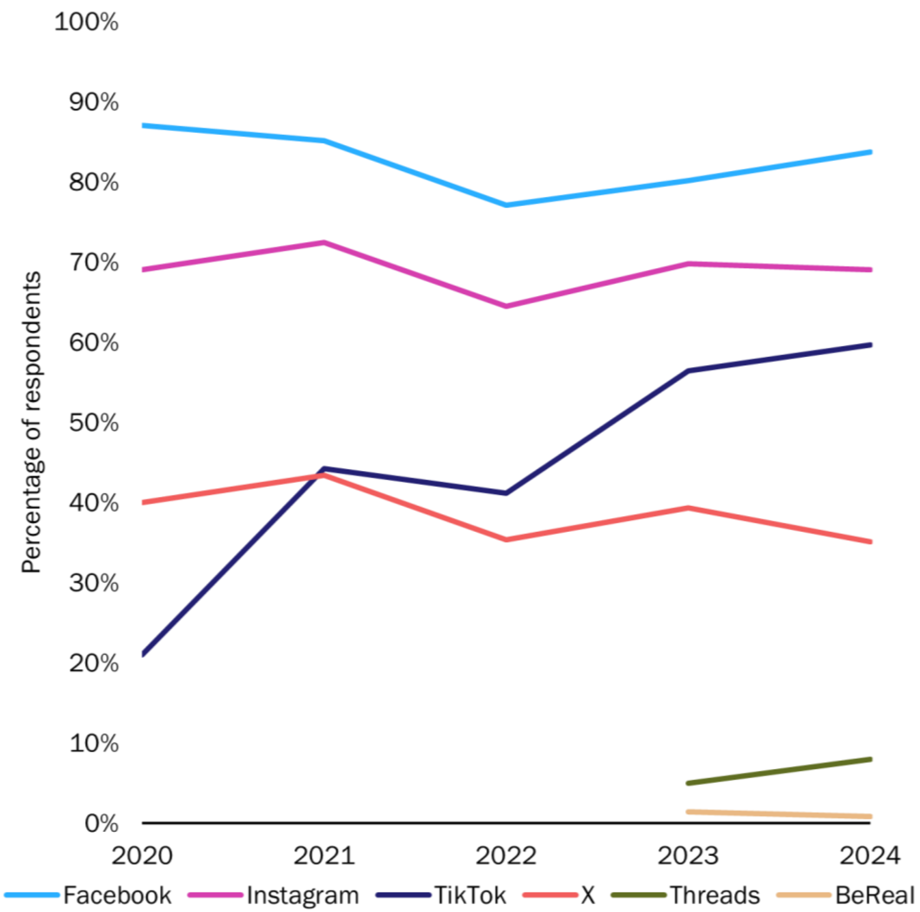
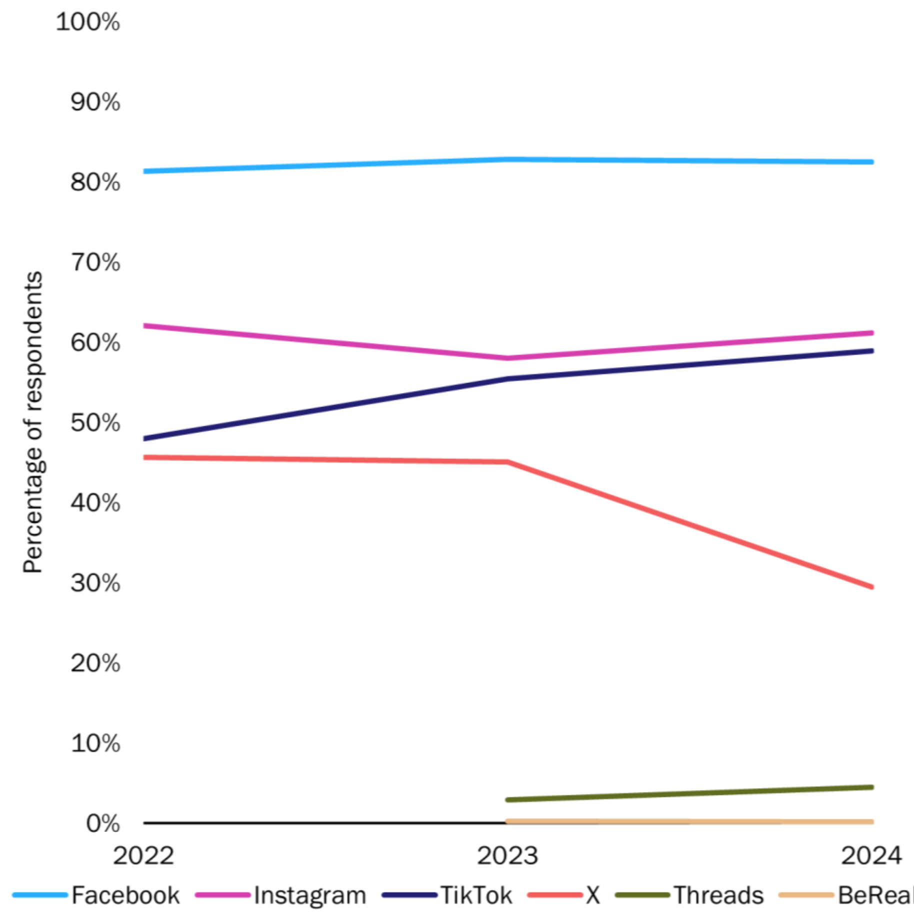
Malaysia has the highest TikTok penetration of all countries surveyed

Figure 23: Penetration of social media services, Malaysia



Source: Analysys Mason

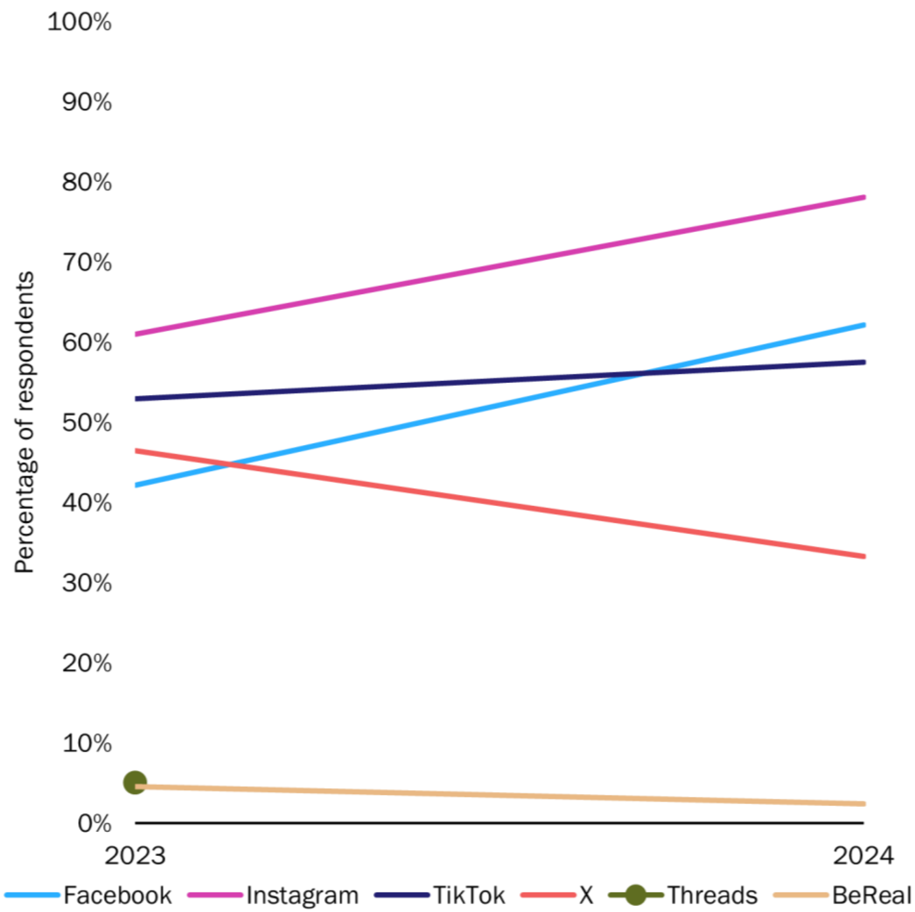
Figure 24: Penetration of social media services, South Africa



Source: Analysys Mason

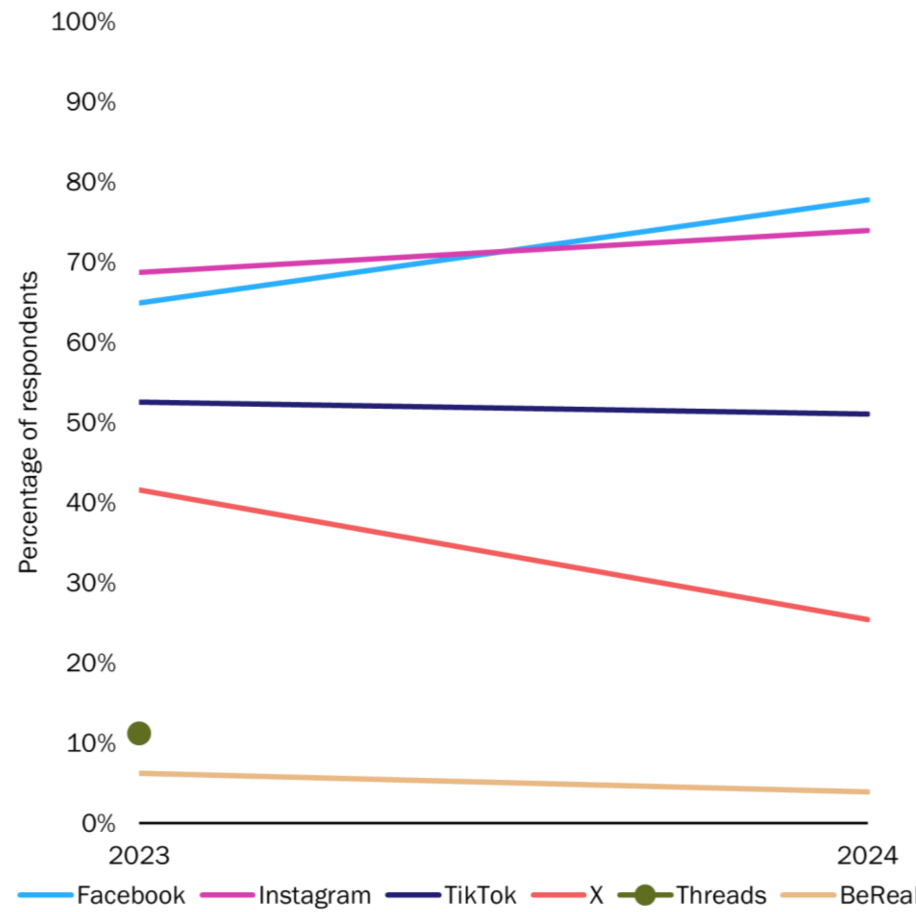
Instagram is very popular in both Saudi Arabia and the UAE, but Facebook is more popular in the UAE

Figure 25: Penetration of social media services, Saudi Arabia[1]



Source: Analysys Mason

Figure 26: Penetration of social media services, UAE[1]



Source: Analysys Mason

[1] Threads take-up data for Saudi Arabia and the UAE in 2024 is unavailable due to technical issues.

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Methodology

Figure 27: Information about the survey methodology

Category	Details
Countries included	▪ Western Europe: France, Germany, Ireland, Italy, Norway, Spain, Sweden and the UK ▪ Central and Eastern Europe: Poland and Turkey ▪ North America: Canada and the USA ▪ Developed Asia–Pacific: Australia and New Zealand ▪ Emerging Asia–Pacific: Malaysia ▪ Sub-Saharan Africa: South Africa ▪ Middle East and North Africa: Saudi Arabia, UAE
Type of survey	20-minute web-based survey, comprising yes/no, multiple choice, text and numerical answer questions.
Panel	18 500 respondents aged 18 years or over, representative of the demographic characteristics of internet users in each country, which closely matches the national demographic characteristics of individual countries sampled. Conducted in July 2024.
Language	Translated into local languages by professional translators and checked in-house. Non-technical language was used in the survey to ensure a high level of inclusion and understanding.
Filtering and weighting	Despite maintenance of the survey panel base and the filtering out of respondents who had provided inconsistent results to previous surveys, a minority of respondents occasionally provided anomalous results (referred to as 'outliers') that suggested that they had made an error or experienced technical difficulties. Such outliers were filtered from aggregate results as appropriate. The number of respondents ('n') reported beside each question in this report takes this filtering into account. Further, we apply a weighting to individual respondents to best reflect the demographic characteristics of the online population.
Net Promoter Score (NPS)	NPS is a metric used to calculate customer loyalty and satisfaction. Respondents are asked to rate on a scale from 0–10 whether they would recommend a product, service or company to a friend. A score of 0–6 is considered a detractor, 7–8 is considered neutral and 9–10 is considered a promoter. The percentage of detractors is subtracted from the percentage of promoters to give a score between +100 and –100.

Panel information

Figure 28a: Age and gender splits for respondents

Country	Male						Female						Other/prefer not to say					
	18–24	25–34	35–44	45–54	55–64	65+	18–24	25–34	35–44	45–54	55–64	65+	18–24	25–34	35–44	45–54	55–64	65+
France	52	74	79	83	76	112	50	74	81	84	82	147	1	1	1	1	-	1
Germany	46	78	75	84	92	115	42	74	73	82	92	147	1	-	-	-	-	-
Ireland	57	82	104	95	72	86	52	81	110	91	72	94	1	-	1	-	1	-
Italy	41	64	76	95	85	123	38	61	75	98	88	154	-	-	-	1	-	1
Norway	60	86	75	79	75	104	62	79	77	82	78	140	1	-	1	-	-	-
Poland	43	86	101	80	78	87	40	83	100	83	83	134	-	-	-	-	1	-
Spain	43	68	91	98	81	103	41	67	90	97	84	133	-	-	-	2	-	2
Sweden	52	92	81	82	74	119	46	86	77	80	73	136	-	1	-	-	-	-
Turkey	74	106	107	86	67	54	70	111	107	86	66	65	-	1	-	-	-	-
UK	53	82	80	83	78	105	52	87	84	86	81	126	-	-	1	-	-	1
Canada	52	90	81	77	86	108	52	91	98	81	82	101	-	-	-	-	-	-
USA[1]	122	174	164	156	162	192	118	172	166	162	172	236	2	-	-	-	-	-
Australia	50	83	90	82	74	101	48	92	94	90	78	115	2	-	-	1	-	-
New Zealand	67	89	75	79	73	100	61	89	80	86	79	118	-	-	2	-	1	-
Malaysia	84	125	116	100	58	28	78	120	114	96	48	28	3	-	1	-	1	-
South Africa	97	129	101	65	45	38	90	133	103	76	60	61	1	1	1	-	-	-

[1] The US panel consisted of 2000 respondents, but for consistency of comparison with previous years' data, we have reweighted it to 1000 respondents in all charts and statistics that relate to the panel as a whole, rather than to individual countries.

Panel information

Figure 28b: Age and gender splits for respondents

Country	Male						Female						Other/prefer not to say					
	18–24	25–34	35–44	45–54	55–64	65+	18–24	25–34	35–44	45–54	55–64	65+	18–24	25–34	35–44	45–54	55–64	65+
Saudi Arabia[1]	230	227	77	21	7	2	73	72	24	8	3	-	1	3	1	2	-	-
UAE[1]	183	178	67	22	6	-	109	119	53	8	2	-	2	2	2	-	-	-

[1] Saudi Arabia and UAE had 750 respondents , but for consistency of comparison with previous years' data, we have reweighted them to 1000 respondents in all charts and statistics that relate to the panel as a whole, rather than to individual countries.

How you can make more of our annual consumer survey data

The data featured in this report is a small fraction of the data that we have collected as part of our consumer survey series since 2008. All information that you see in this report can be cross-tabulated and analysed in more detail to meet your needs or to answer particular questions that you might have. The full data set contains detailed information about device brands, operators, geographical regions of each country, and more.

You can access more information and data from our surveys in the following ways.

- Read the full survey report series here.
- If you are a subscriber, use our **unlimited analyst enquiry** service to discuss the data in more detail and derive a single table of new results.
- You can use your **analyst support hours** allowance to ask us to produce multiple tables or charts or conduct statistical analysis.
- Commission a **custom project** to use the survey to produce an evidence-driven perspective paper based on strategic insights, broader and deeper tabulations and analysis of the results.

For a detailed description of the topic areas and questions included in our survey, contact clientsuccessteam@analysysmason.com.

Examples of recent work completed using our consumer surveys.

- For an incumbent telecoms operator, we produced a multi-country analysis of household profile types (demographics, size of family, connectivity type (FWA/mobile/fixed)). The output was a PowerPoint deck providing insights and analysis and an Excel spreadsheet with ten tables.
- For a regulator interested in sizing the domestic streaming video market for the first time, we provided a single country data cut that included 40 tables related to who was taking which streaming video service, their satisfaction, telecoms provider and various demographic details.
- For a multinational consultancy, providing a 5-year timeseries of how touchpoint preferences have changed for telecoms operator customer service and sales, by country. The output was an Excel file of 25 tables.
- For Nokia, we produced a perspective paper analysing the relationship between NPS and aspects of broadband satisfaction and how AIOps potentially helped operators to improve customer experience. Full paper here.
- For Huawei, we produced an article exploring the 'QoE gap' that many consumers felt as they upgraded to gigabyte broadband services and how fibre-to-the-room (FTTR) services might help to alleviate this issue. Full paper here.

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Stefano Porto Bonacci (Principal Analyst) is the lead analyst for the *Fixed–Mobile Convergence* and *Mobile Services* research programmes. He provides insights into what consumers want from telecoms operators and how operators can meet consumers' needs. He has more than 7 years of experience in developing and delivering data and reports in the technology, media and telecoms space. He holds an MSc in economics and has experience as an economic analyst.

Analysys Mason is a global technology, media and telecoms management consulting firm

We help clients navigate complex transformation journeys and make and act on the decisions that steer their progress and connect our world.

We have been at the forefront of pivotal moments that have shaped the technology, media and telecoms industry for four decades, from guiding government agencies to forge the path for mass connectivity, to defining the strategies for companies exploring the opportunities of space and satellites.

Together we are shaping the next

Our research and insights put clients at the forefront of change

Research and insights programmes

Consumer Services

- Fixed Services
- Fixed–Mobile Convergence
- Future Comms
- Mobile Services
- Smart Devices
- Video, Gaming and Entertainment

Business Services

- Enterprise Services
- IoT Services
- Private Networks
- SME Services

Operational Applications

- Automated Assurance
- Customer Engagement
- Digital Experience
- Monetisation Platforms
- Network Automation and Orchestration
- Service Design and Orchestration
- Applications Data and Strategies

Networks and Cloud

- Cloud and AI Infrastructure
- AI and Data Platforms
- Fibre Infrastructure
- NaaS Platforms and Infrastructure
- Wireless Technologies
- Operator Spending
- Sustainable Networks
- Wireless Infrastructure

Space

- Earth Observation
- Government and Military Space
- Satellite Capacity
- Satellite Infrastructure
- Satellite Mobility
- Satellite Strategies for Telcos
- Space Ground Segment

Data modules

Telecoms Data

- Americas Metrics and Forecasts
- Asia–Pacific Metrics and Forecasts
- European Core Forecasts
- European Country Reports
- European Quarterly Metrics
- Global Telecoms Data and Financial KPIs
- Middle East and Africa Metrics and Forecasts

SMB Technology Forecaster

- Business Applications
- Cyber Security
- Devices and Peripherals
- IT Infrastructure
- IT and Managed Services
- UC and Digital Services

Knowledge Centre and DataHub

We support clients with decision-making and complex change journeys

Strategy

We assist clients in shaping and determining the decisive moments that steer their progress and chart the course for lasting change.

We deliver essential advice and insights that drive efficiencies, mitigate risk and accelerate growth and put our clients at the forefront of change.

Research and insights

We provide qualitative and quantitative subscription research, bespoke research, and access to DataHub, our analyst-supported intelligence platform. These are essential assets for strategic planning and for our clients' investment and marketing decisions.

Regulation and policy

We advise major government and industry stakeholders on regulation and policy and have shaped the pivotal moments that have defined technology, media and telecoms (TMT) and connect our world.

Transaction support

We help investors with their investment and divestment decisions. We identify, evaluate and help implement investment decisions that deliver lasting results.

We provide robust and precise appraisals of investment opportunities related to capabilities, commercial, technical and ESG risks, their mitigants and investment upsides.

Transformation

We support clients to act on the decisions that create lasting value, advantage and change

We guide them through every phase of change on their complex transformation journeys and strategic change programmes.

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