

A Global Social Media Snapshot

[CONSUMER](#) [GLOBAL](#) [SOCIAL MEDIA](#)

TOM SMITH 31 AUG 2011

Social media is fundamentally impacting the way we globally consume media and communication. Over 50% of the population worldwide is active in social media.

The internet is all social

Sometimes the hype is right. Consumer internet adoption across the world is now increasingly defined by social media. Since launching in 2009, the GlobalWebIndex and the 4 waves of research that have been delivered to date, have demonstrated substantial growth in social media adoption. The fastest growing type of website between July 2009 and February 2011, is unsurprisingly Social Networks, with the percentage of consumers visiting on a monthly basis rising 29% to 49%. This is mirrored with video sharing sites (increase of 18), photo sharing (15%) and consumer review sites (7%) In contrast static

sites such as news, portals and even search have declined in consumer visits globally. This shows a dramatic shift from the early model of the internet defined by siloed URLs, static content and automated algorithms, to a model today that is defined by social technologies and the internet users that use them.

The result is a stunning level of consumer involvement in social media. When looking at a combination of active participation in, blogging, Forums / BBS, microblogging, uploading video and social networks via a PC device we can see that in all markets at least 50% of internet users take part in one activity on a monthly basis. In some markets such as Brazil, China and Russia this climbs to over 80%. Even more telling is that this percentage has grown slightly in all markets over the last 18 months, showing that social is cemented and here to stay.

Real-time taking over from

There is a major shift taking place in terms of the social platforms that internet users actively contribute too. As of February 2011 the fastest growing form of social contribution was Microblogging (not just Twitter), growing 28.4% in 18 months, with 14% of global internet users now actively contributing on a monthly basis. This is followed by Social Networking, which grew 20.8% and video sharing 19.9%. In contrast, contributing to a website, only grew 6.4%, blogging 3.4% and posting in a forum or BBS actually declined 5.8%.

In short consumer contribution via social media platforms is increasingly in Real-Time environments, whether that be Twitter and Facebook in the US or Sina Microblog or RenRen in China. This has a major implication of the impact of social media. When social technologies arrived, it was defined by consumers creating and publishing their content. This was seen very much as threat to the established media industry and professional content producers, however realtime platforms do not enable content creation and are focusing users on sharing opinions, other peoples content or responding to or interacting with live events. As our research shows, the top three forms of microblogging behaviour after sharing photos or images, are linking another microblog, linking to videos and linking to news stories.

Consequently real-time has created a renaissance in the traditional media business, as they have the content, live events and access to journalists, celebrities and people in the public eye. Thanks to this trend, social media in many ways is becoming less social.

BRIC and emerging markets lead the way

The adoption of all mainstream social technologies is being led by fast growing internet markets. This is demonstrated clearly by monthly involvement in social networking, where 76% of internet users in Philippines and Indonesia use one. This is followed by Malaysia with 68%, Brazil and Russia with 64% and India 63%. Compare this to the US , where 53% are active, UK 46%, France 41% and Japan just 16%.

The higher levels of adoption are demonstrated regardless of which demographic, attitudinal outlook or job type you compare. Users in fast growing markets are doing more with social media. The country you are born in, is without doubt the key factor in how you will go on to adopt and use social media.

At the GlobalWebIndex we have spent much time exploring the why we see this and there are a number of clear reasons. Firstly in developed markets, people have been online longer and their online behaviour has been defined from a pre social age, focused on purchasing, information research and news content. We also see far greater competition from traditional media, where high cost fixed infrastructure of cable/satellite, multi room TV households, or games consoles erode our need to turn to the internet. In fast growing markets, the internet and social media are thanks to a lack of competition from traditional media usually the number one form of entertainment for the connected consumer. We also see that users in fast growing markets are using social media to achieve personal success, either through education, their own business or through work – something that is not universal in developed markets. Social platforms have also been adopted as form of free expression and a chance to express individuality, something that traditionally didn't come easily in hierarchal societies like China, South Korea or India.

The new opportunity for brands

The massive adoption of social media has fundamentally changed the way that consumers want to interact with brands and there is now a real desire to interact, converse and be entertained by brands. When asked about what “social brand activation” techniques are most likely to improve their opinion of the participating brand, the number one action regardless of age was to “listen to comments on forums/social networks”, this was followed by a “website/presence to interact with the brand directly” and then “creating applications / online services”. It is clear the role of a brand as simply an advertiser is over and concerns about a brands right to be active in social spaces is misplaced. Consumers crave and value brand interaction in all forms.

The impact of the Post PC era

As we look forward, we can see that social media will be revolutionised by the way that people get online. This is already happening with the massive growth of mobile internet adoption that has grown from 32% of internet users to 45% of internet users on a monthly basis, in just 18 months. This is only the start in the shift to the post PC world. In February 2011, we asked what the favourite internet device was today and 86% stated their personal PC / Laptop and just 1% a tablet device and 5% their mobile. However when asked what their favourite device will be in one year, just 54% stated their PC / Laptop and a massive 15% stated Tablet and 15% mobile. Even 8% mentioned an internet connected television set. This demonstrates clearly the massive demand to move to post PC devices, a shift that will again radically transform social media. Mobiles, tablets and TVs are dominated by applications and shift consumers from the open platform of the browser based internet. This will focus social involvement on content sharing not creation and re-enforce the shifts that have been initiated by the real-time revolution.

CONSUMER GLOBAL SOCIAL MEDIA