

Online activities report shows emerging markets more active

TNS, one of the world's biggest custom research companies, released its largest ever global research project into people's online activities and behaviour on Sunday, 10 October 2010. Covering 88% of the world's online population through 50 000 interviews with consumers in 46 countries (and 1 000 in South Africa), the Digital Life study reveals a number of very significant findings as well as providing indicators for the future of the world's online behaviour.

"This study covers more than twice the markets of any other research of this kind," said TNS chief development officer Matthew Froggatt. "Not only is it the first truly global research into online activities, including all the key emerging markets of BRIC and many of the next 11, we have also researched beyond basic behaviour to provide more detailed data into attitudes and emotional drivers of that behaviour."

"We believe that our research data, which we intend to do annually, will become the new benchmark for information on online consumer behaviour. Providing some of the data to the world was an important first step for us and obviously we have a wealth of further information behind those basic statistics."

Key findings

- Globally, people who have online access have digital sources as their number one media channel
- 61% of online users use the internet daily against 54% for TV, 36% for radio and 32% for newspapers
- Online consumers in rapid growth markets have overtaken mature markets in terms of engaging with digital activities
 - Rapid growth markets such as Egypt (56%) and China (54%) have much higher levels of digital engagement than mature markets such as Japan (20%), Denmark (25%) or Finland (26%)
 - This is despite mature markets usually having a more advanced internet infrastructure
 - South Africa fits neatly into the emerging market pattern with 51% having high levels of engagement
 - Activities such as blogging and social networking are gaining momentum at huge speed in rapid growth markets. China (88%) and Brazil (51%) have written their own blog or forum entry, compared to only 32% in the US. South Africa does not follow the rapid growth pattern with only 35% having written a blog.
 - Internet has also become the default option for photo sharing among online users in rapid growth markets, particularly in Asia. The number of online consumers who have ever uploaded photos to social networks or photo sharing sites is 92% in Thailand, 88% in Malaysia and 87% in Vietnam, Japan (28%) and Germany (48%). South Africa falls between these two extremes with 60% having uploaded photos
- Growth in social networking has been fuelled by the transition from PC to mobile. Mobile users spend on average 3.1 hours per week on social networking sites compared to just 2.2 hours on email. South Africans online spend over double that time on social networking (6.7 hours) but a little less on e-mail - 1.6 hours.
- Drive to mobile is driven by the increased need for instant gratification and the ability of social networks to offer multiple messaging formats, including the instant message or update function.
- Consumers expect their use of social networking on mobiles to increase more than use through PC. In the US, 26% of online consumers expect their use of social networking on a PC to increase in the next 12 months compared to 36% who will be looking to their mobile to increase usage. In Australia the figures are 26% and 44% respectively, and in Sweden they are 28% and 53%. In South Africa, both figures sit at 65%, so we can expect a massive increase in social networking from both platforms - social connectivity in South Africa is set to rise exponentially.

Goodbye email, hello social networking

Online consumers on average spend more time on social networking sites such as Facebook and LinkedIn than on email, despite the former only becoming mainstream in many markets over the last few years. In rapid growth markets such as Latin America, the Middle East and China, the average time spent, per week, on social networking is 5.2 hours compared to only 4 hours on email. Online consumers in mature markets remain more reliant on email, spending 5.1 hours compared to 3.8 hours on social networking. The heaviest users of social networking are in Malaysia (9 hours per week), Russia (8.1 hours per week) and Turkey (7.7 hours per week). South Africans online spend 6.2 hours per week on social networking and just 2.6 on e-mail.

When it comes to who has more friends, online consumers in Malaysia top the list with an average of 233 friends in their social network, closely followed by Brazilians with 231. The least social are the Japanese with just 29 friends and Tanzanians have, on average, 38 in their circle of friends. Surprisingly, Chinese consumers only have an average of 68 friends in their networks despite being heavy users of social networking sites, indicating a culture that embraces fewer but closer friendships. South Africa falls between these extremes with an average of 133 friends.

Most popular		Least popular	
Country	Number of friends on social networking	Country	Number of friends on social networking
Malaysia	233	Japan	29
Brazil	231	Tanzania	38
Norway	217	South Korea	50
South Africa	133		

Growth is in emerging markets

Froggatt continued, "The Internet is a huge part of life in the 21st century but how it affects our lives varies depending upon where in the world you live. We have seen that in mature markets, where people have been online for years and where access is ubiquitous, the Internet has already become a commoditised item that consumers take for granted. However, in rapid growth markets that have seen recent, sustained investment in infrastructure, users are embracing these new channels in much more active ways. The digital world is transforming how they live, develop and interact and online consumers in these markets are leaving those in the developed world behind in terms of being active online and engaging in new forms of communications."

Analysis available

TNS completed analysis of the results of its 46-country study into online behaviour and perspectives around the world in September 2010, interviewing 48 804 people aged 16 to 60 years. The South African study was conducted by TNS Research Surveys amongst 1 000 people aged 15 years and more, who had used the internet in the past four weeks either via a computer or via a mobile device and who lived in the seven major metropolitan areas of South Africa. It has a margin of error of under 3.5% for the results found for the total sample.

The core data from the study is publicly available on www.discoverdigitallife.com, with TNS providing more detailed reports and breakdowns to its clients.

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