European Social Media Trends
Behaviour, impact, evolution.
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globalwebindex.net
Today

European results from the Global Web Index

• Social Media involvement across Europe
• Motivations to use the web
• Impacts
• Evolution
Today: European perspective
Detailed web behaviour

- Web behaviour
- Social media
- Motivation
- Content
Web: Consumer + purchasing + communications
Launching with 32,000 consumer opinions annually

16-64 active web users (online monthly)

Representative by age, gender, income volume of usage, region

Self completion online questionnaires conducted via Lightspeed global panels

30 minute survey

Local language

Wave 1: 16,000 respondents

Wave 2: 16,000 respondents

32,000 annual survey release
Social Media Involvement
Hype goes something like this......
Global perspective: Motivations for involvement: Very important
Russia is the most socially driven

Motivations for involvement: Very important

Below are various reasons why you use the Internet. Please think about how important these reasons are for you using the Internet.
Germany and UK are most purchase orientated

Motivations for involvement: Very important

Below are various reasons why you use the Internet. Please think about how important these reasons are for you using the Internet.
<table>
<thead>
<tr>
<th>Motivations are fundamentally different by market</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Netherlands</strong></td>
</tr>
<tr>
<td>Stay up to date on news / events</td>
</tr>
<tr>
<td>Stay in touch with friends</td>
</tr>
<tr>
<td>Research / find products to buy</td>
</tr>
<tr>
<td>Fill up spare time</td>
</tr>
<tr>
<td>Entertainment</td>
</tr>
<tr>
<td>To get inspired / get ideas</td>
</tr>
<tr>
<td>Research for work</td>
</tr>
<tr>
<td>Share my opinion</td>
</tr>
<tr>
<td>Play games</td>
</tr>
<tr>
<td>Find music</td>
</tr>
<tr>
<td>Keep my friends up to date with my life</td>
</tr>
</tbody>
</table>
You will now see a number of online activities that you currently take in. For each one, please can you select the main reasons you partake in that activity online?
Remember the hype?.....
Reality is different

You will now see a list of items that represent different activities you can do online. Please read each one carefully and then indicate whether you have done that in the past month, or whether you have done it longer ago.

- Watch video clip
- Visit a forum
- Upload photos online
- Manage a social network profile
- Leave a comment on a story on a website
- Edit/managed own website
- Written your own blog
- Uploaded a video online
- Written a news story / article
- Use a micro-blogging service

Behaviour online – last month. Global
Russia and UK lead in social networking

You will now see a list of items that represent different activities you can do online. Please read each one carefully and then indicate whether you have done that in the past month, or whether you have done it longer ago.
Spain, Italy and Russia are mixed access

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Consistent pattern in all ages

Behaviour online – last month.

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Russia sharing huge volumes of content

You will now see a list of items that represent different activities you can do online. Please read each one carefully and then indicate whether you have done that in the past month, or whether you have done it longer ago.
Response to our motivations

- Staying in touch with friends
- Share my opinion / Share content
- Promote something

- Social Networking / Sharing photos
- Blogs
- Micro-blog / Twitter
Not all about Facebook

Social networks – active profile
This is where they’re going.....(in Russia)
IMPACTS all users + purchasing

85% used search last month to look for a specific product

49% used search to look for a specific recommendation
AND We research everything online

% of buyers who researched prior to purchase (offline and online)

Source: Global Web Index
Social makes search even more important

- Funnelling demand
- Managing reputation
- Overlaying of the social graph
- Going mobile
Below is a list of people whose opinions you come into contact with on a regular basis. Now think about when you seek an opinion on a brand you are considering buying. Which of the following people do you trust to provide you the most accurate opinion? Please score them on a scale of 1 – 5, with 1 = do not trust and 5 = trust strongly.
For all age groups

Trust in communications: UK

Below is a list of people whose opinions you come into contact with on a regular basis. Now think about when you seek an opinion on a brand you are considering buying. *Which of the following people do you trust to provide you the most accurate opinion?* Please score them on a scale of 1 – 5, with 1 = do not trust and 5 = trust strongly.
Now the consumer network is important

Factors important when looking for content:
All content will be dictated by the social ecosystem
We will have one digital identity
Now: Digital networks are bigger than face to face

Network Size: How many people you stay in touch with

- Brazil: 31.2
- China: 51.5
- USA: 42.8
- UK: 49.3
- Russia: 38
Networks of strangers: comfortable with the unknown

Facebook: 9%*
LinkedIn: 3%*
Twitter: 0.3%*

*Percentage of people I would phone up for a beer
That network will become Augmented Reality
Social will inform everything and everywhere

- Immediate social group
- Connected group
- People like me

- Actions, behaviour and reviews will be overlaid on our real life experience
Evolution
## Make social central to all communications

### Path to purchase

<table>
<thead>
<tr>
<th>Improve my opinion of the brand</th>
<th>Keep me informed of the brand</th>
<th>Get me to buy the brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>A face to face recommendation</td>
<td>Television advert</td>
<td>A face to face recommendation</td>
</tr>
<tr>
<td>Television advert</td>
<td>An email sent to you</td>
<td>Television advert</td>
</tr>
<tr>
<td>A website created by the brand</td>
<td>A face to face recommendation</td>
<td>A recommendation online from a contact / friend</td>
</tr>
<tr>
<td>An email sent to you</td>
<td>A website created by the brand</td>
<td>An email sent to you</td>
</tr>
<tr>
<td>Magazine advert</td>
<td>A direct mail sent to your house</td>
<td>A website created by the brand</td>
</tr>
<tr>
<td>A recommendation online from a contact / friend</td>
<td>Newspaper advert</td>
<td>A direct mail sent to your house</td>
</tr>
<tr>
<td>Newspaper advert</td>
<td>Newspaper or magazine featuring the brand</td>
<td>Newspaper advert</td>
</tr>
<tr>
<td>Newspaper or magazine featuring the brand</td>
<td>Poster on a high street</td>
<td>Magazine advert</td>
</tr>
<tr>
<td>Poster on a high street</td>
<td>Advert in a store / shop front</td>
<td>Radio advert</td>
</tr>
<tr>
<td>Advert in a store / shop front</td>
<td>Film or television programme featuring the brand</td>
<td>Advert in a store / shop front</td>
</tr>
<tr>
<td>Film or television programme featuring the brand</td>
<td>Sponsorship of a major event e.g. sports or music concert</td>
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<td>Radio advert</td>
<td>Advert on a major website</td>
<td>Cinema advert</td>
</tr>
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<td>Sponsored link on a search engine</td>
<td>Online video featuring the brand</td>
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Think beyond: Content, apps and ideas

Europe: Role for brands

Please think again about the same brand. Below are list of activities that the brand can implement. Which of the following actions are most relevant to you as a person? Where 1 = not at all relevant and 5 = very relevant.
Below is a list of activities that brands can engage in online. Some of these are very new and some will be more familiar to you. Please can you state your opinion on brands engaging in these activities?

- Providing a page in a social network where you can ask questions directly to the company
- Listening to the comments that people say on forums, or social networks
- Contacting me with helpful information if I mention the brand on a microblog e.g. Twitter
- Creating blogs to talk about the company and product
- Talking to bloggers directly about relevant products and services
- Creating videos online featuring the brand
- Using targeted advertising (advertising that analyses your web behaviour and provides relevant advertising)
- Sponsoring music downloads
- Creating groups in social networks
- Becoming your friend in a social network
- Sponsoring blogs

UK V Italy DATA: Perception of brands in social media / new channels

Below is a list of activities that brands can engage in online. Some of these are very new and some will be more familiar to you. Please can you state your opinion on brands engaging in these activities?
Be there with purpose

- 31.4% Providing a page where you can provide feedback directly
- 12.2% Starting a group in a social network
- 10.8% Being a Friend

Europe DATA: Perception of brands in social media / new channels. Improve my opinion of the brand
Impacts the whole business

- External Comms
- Recruitment
- Product development
- Customer service
- Market Research

Brand X
Wrap up
Wrap up

Active social media involvement is big

Passive impact is bigger

Social is powerful and impacts purchase decisions

Embrace conversation and relationship