



# Global 'Digital Life' research project reveals major changes in online behaviour

- *New website showcases data from largest ever online research project covering 46 countries and 90% of world's online population*
- *Launched on 'digital day', first survey reveals major differences in online attitudes and behaviour:*
  - *Online is now the media of choice*
  - *Mature markets being left behind online as emerging markets become more active*
  - *Increase in mobile use as consumers seek greater access to social networking on the go*

**London – 10/10/10** – The largest ever global research project into people's online activities and behaviour - **Digital Life** - was launched today, 'digital day' by TNS, the world's biggest custom research company. Covering nearly 90 per cent of the world's online population through 50,000 interviews with consumers in 46 countries, the study reveals major changes in the world's online behaviour.

Core data from the study is being made publicly available via an interactive website - [www.discoverdigitallife.com](http://www.discoverdigitallife.com)

"This study covers more than twice as many markets as any other research." said TNS Chief Development Officer Matthew Froggatt. "It is the first truly global research into online activities, including all the key emerging markets of the BRICs 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 are confident that Digital Life will become the new benchmark for information on online consumer behaviour," continued Froggatt. "Making a lot of this publicly available was an important first step for us and obviously we have a wealth of further information behind those basic statistics covering the wider digital landscape, attitudes to brands and the path to purchase which we will offer to clients."

Among the key findings of the study are:

- ***Globally, people who have on-line 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.*** When looking at behaviour online, 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.
- ***Activities such as blogging and social networking are gaining momentum at huge speed in rapid growth markets.*** The research shows four out of five online users in China (88%) and over half of those in Brazil (51%) have written their own blog or forum entry, compared to only 32% in the US. The 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, whilst developed markets are more conservative. Less than a third of online consumers in Japan (28%) and under half of those in Germany (48%) have uploaded photos to such sites.
- ***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. The 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. When looking at how the digital landscape will change in the future, research shows that consumers expect their use of social networking on mobiles to increase more than use through PC. In the US, for example, a quarter (26%) of online consumers expect their use of social networking on a PC to increase in the next 12 months compared to over a third (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%.

### **Goodbye email, hello social networking**

One further finding of the study showed that online consumers are, on average, spending 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 checking their inboxes compared to just 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).

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.

#### Most popular

Country	Number of friends on social networking
Malaysia	233
Brazil	231
Norway	217

#### Least popular

Country	Number of friends on social networking
Japan	29
Tanzania	38
South Korea	50

Froggatt continued: “The Internet is a huge part of life in the 21<sup>st</sup> century but how it affects our lives varies depending upon where in the world you live. We’ve 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.”

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## **About Digital Life**

[www.DiscoverDigitalLife.com](http://www.DiscoverDigitalLife.com)

Digital Life is the world's largest study into consumers' digital behaviours and attitudes ever conducted. The study seeks to go beyond behaviour to understand the core emotional drivers behind what consumers do online.

TNS completed analysis of the results of its 46-country study into online behaviour and perspectives around the world in September 2010. A total of 48,804 people aged 16 to 60 years old were interviewed in the following countries: Argentina, Australia, Austria, Belgium, Brazil, Canada, China, Denmark, Egypt, Estonia, Finland, France, Germany, Greece, Hong Kong, India, Indonesia, Israel, Italy, Japan, Kenya, Luxembourg, Malaysia, Mexico, Morocco, Netherlands, Nigeria, Norway, Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Tanzania, Thailand, Turkey, UAE, Uganda, UK, USA and Vietnam.

A taster of the study is being brought to life online via an interactive data visualisation. This has been created by Digit: [www.digitlondon.com](http://www.digitlondon.com), a WPP partner company that specialises in design and interaction. The visualisation will be made available for anyone to sample at [www.discoverdigitallife.com](http://www.discoverdigitallife.com)

## **About TNS**

TNS is the world's largest custom research agency delivering actionable insights and research-based business advice to its clients so they can make more effective business decisions. TNS offers comprehensive industry knowledge within the Consumer, Technology, Finance, Automotive and Political & Social sectors, supported by a unique product offering that stretches across the entire range of marketing and business issues, specializing in product development & innovation, brand & communication, stakeholder management, retail & shopper, and qualitative research. Delivering best-in-class service across more than 75 countries, TNS is part of Kantar, one of the world's largest research, insight and consultancy network. Please visit [www.tnsglobal.com](http://www.tnsglobal.com) for more information.

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Kantar is one of the world's largest insight, information and consultancy networks. By uniting the diverse talents of its 13 specialist companies, the group aims to become the pre-eminent provider of compelling and inspirational insights for the global business community. Its 26,500 employees work across 95 countries and across the whole spectrum of research and consultancy disciplines, enabling the group to offer clients business insights at each and every point of the consumer cycle. The group's services are employed by over half of the Fortune Top 500 companies.

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