



Press information

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IS OUR LEISURE TIME BECOMING DIGITAL TIME?

New survey into global digital life reveals strongest online engagement and participation in Asian countries

Singapore, November 28th — A TNS global survey entitled *Digital World, Digital Life* examining online behaviours and perspectives shows that, on average, people across the 16 countries surveyed are spending close to a third (30%) of their leisure time online.

It appears we like our 30% digital time regardless of how much free time we have. *Digital World, Digital Life* found that respondents with up to 2 hours leisure time each week day, spent the same proportion of their leisure time online as respondents who had between 7 and 8 hours of leisure time on a week day. This means there is no direct link between the amount of leisure time we have and how much of it we spend online.

What are the top 5 activities that people undertake while online? TNS asked people to identify a range of activities in the month before they took the survey. A total of 81% had used a search engine to find information; 76% had looked up the news; 74% had used online banking; 65% had looked up the weather; and 63% had researched a product or service before buying it. These activities are all inherently very practical. The highest ranking classic leisure activity – “watching a video clip” – only came in at number 8, with half (51%) saying they had done this in the past month. Another leisure activity – “listening to an audio clip” – came in at number 10 (44%).

Who and where are the most avid onlineers in the world? If the world is to take its lead from Japan and Korea – countries that are seen as being innovative and pioneering in the online world – then we can expect from these countries to spend a lot of their time online. In those countries, respondents say they currently spend on average around two-fifths of their leisure time online. And if we look specifically at younger people under 25, they spend well over a third (36%) of their time online with Chinese respondents under 25 even spending half (50%) of their leisure time online.

China's digital enthusiasm stood out in another section of the survey which looked at **levels of engagement** with social media. In China, nearly nine out of ten (88%) of respondents say they either actively 'view' blogs or 'contribute' to them. Just over nine out of ten of Chinese respondents (94%) engaged in forums, again as 'viewers' or 'contributors' Slightly less than nine out of ten (85%) 'are using chat rooms. More than four fifths (82%) engage in sharing photos or videos online. And two thirds (66%) have the same level of engagement

with virtual worlds or communities. In all seven categories, China's scores outrank other countries. China is only surpassed by wiki contribution (Germany has the highest level of engagement with nine out of ten Germans – 92% – claiming they are 'viewers' or 'contributors'), and engagement with social network sites (Korea scored highest at 86%).

What is the **frequency for adding content online**? In every case across nine channels identified – blogs, message boards, forums, chat rooms, social network sites, sharing photos and videos online, podcasts and videocasts, wikis and virtual worlds – people claim they create content. China too is once again highly active, with over half (54%) of Chinese blog users saying that they regularly ⁽¹⁾ added content to blogs, followed closely by Italy (51%) Korea (47%), Japan (45%) and Spain (44%) all with over four out of ten respondents making regular blog contributions.

Lee Ryan, TNS Regional Qualitative Director in ALM, comments: "This has significant implications for marketers and market research agencies. Clients who are embarking on social media outreach should start by utilising new tools to observe what is important to consumers. Brands that can develop relevant and inspiring content for consumers to utilise are more likely to be part of future online conversations."

However, the real story appears to be forums. Six out of ten (62%) of Chinese Forum visitors regularly *contribute* to these forums, or Bulletin Board Services (BBS) as they are more popularly referred to. This makes them the most active participants globally. Italians were the next biggest contributors to forums with six out of ten (59%) Italian respondents making regular contributions and then Spain with just under half of all Spaniards (47%) in the survey regularly contributing to forums.

Regarding social network sites, Norway, Denmark and Korea lead the way with well over half of respondents in each country regularly contributing (62%, 57% and 54% respectively). Canada, the UK and China are also large contributors to social networking sites with over four in ten of respondents – in each country – making regular contributions (47%, 46% and 52% respectively). It looks like social networking sites will figure even more prominently in the digital life of certain countries with almost half (47%) of Koreans and just under a third (30%) of Chinese people interviewed stating that their use of these sites will increase in the future.

The *Digital World, Digital Life* study underlined that social media is a worldwide phenomenon. On a global basis, our respondents are each members of an average of 2.5 social networking sites. Korea shows the most enthusiasm for multiple social networking site use with the figure rising to 4.6, followed by China at 3.7. Respondents in Japan and Norway were the least adventurous and tended essentially to stick to the same one site at 1.4 each.

Bernice Klaassen, TNS Head of Interactive in Singapore & Hong Kong, comments: "Our data clearly demonstrates how Asian countries are taking the lead when it comes to social media usage and participation. These relatively new channels are opening up unprecedented opportunities for self-expression, communication and interaction - and more and more we see that the web is becoming integral to all aspects of people's personal and social lives."

How do our respondents see their **future interactions online** changing? The story is positive, with over half of all respondents globally saying their involvement will stay the same or increase across all online interactions in the future. Blogs are a good example; with half (49%) of all respondents surveyed globally saying their involvement will stay the same, but just under one quarter (24%) seeing their usage increasing. There's a similar story with forums (53% for staying the same and 23% increasing) and social networks (over 50% staying the same and 23% increasing).

Our respondents in China claim to have a clear intention to become more engaged online. In five cases – blogs, message boards, forums, chat rooms and podcasts/videocasts – the percentage of respondents in China who see their interaction increasing in future is far ahead of any other country surveyed.

Notes:

⁽¹⁾ *The word 'regularly' is defined as either contributing daily or several times a week*

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Note to Editors:

About *Digital World, Digital Life*

TNS completed analysis of the results of its 16-country study into online behaviour and perspectives around the world at the end of 2008. A total of 27,522 people aged 18 to 55 years old were interviewed online in the following countries: Australia, Canada, China, Denmark, Finland, France, Germany, Italy, Japan, Korea, Netherlands, Norway, Spain, Sweden, the United Kingdom and the United States. The research focused on four themes. First, the survey looked at how we are using the internet for entertainment, information and commerce. Second, the survey analysed whether people are using online channels when making major life decisions – health, family, education, investment etc. Third, how far social media has developed? Last, how much trust do people have in online sources of information versus traditional media or straightforward recommendations from friends?

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