

# Social networking - everyone is doing it. Or are they?

Issued by [Ipsos](#)

5 Sep 2008

Across 17 markets of the world, well over half of the population (58%) do not know what social networking is. This is according to Synovate's recent global survey on the subject of online communication and social networking.

Global head of media research for Synovate, Steve Garton, said the survey was conducted to explore some of the myths and facts that have built up around the online social networking phenomena.

"It seems everyone is social networking. Or are they?"

"We spoke with over 13,000 respondents aged 18-65 years in 17 markets around the world to find out who's connected and who's not, as well as attitudes and online behaviours. Some of what we found surprised us... like more than a third of social networkers say they are losing interest in social media. And how many people do not even know what it is."

Garton explained: "When you're in the world of marketing — reading about it, planning campaigns, researching people — it's sometimes easy to overlook the basics. So we started our study by simply asking 'do you know what online social networking is?'."

"And that's where our first myth was debunked. It turns out social networking is not taking over the world. Well, not yet anyway."

Across the 17 markets surveyed, 42% of people know what online social networking is, which leaves 58% in the dark... either saying 'no' or 'don't know'. In South Africa, this figure is as low as just over a fifth.

The Dutch were most likely to know the term with 89% answering 'yes', followed by Japan at 71% and Americans with 70% answering in the affirmative. Still, that leaves three in every ten Americans (the home of social networking) outside the world of digital friends and relationships.

## Who's in the in-crowd?

The Synovate survey also looked into who were members of sites, or not, and which sites they belonged to. Perhaps the biggest takeout here is the debunking of myth number two. Social networking is definitely not US-centric.

Overall, 26% across the markets surveyed are members of social networking sites. This peaked with the Netherlands at 49%, United Arab Emirates (UAE) at 46%, Canada at 44% and the US at 40% (though keep in mind that's 40% of a huge population). South Africa has a comparatively low membership at 16%.

"This is not surprising," states Jake Orpen, Group Client Services Director at Synovate. "2007 saw the trend of social networking really taking off in South Africa and there is still a large group of the online population that have yet to join any of these sites."

"These sites also offer a way for people to meet - online - in a society where traditionally men and women don't always mix freely."

## Sites of choice

The survey then asked social networkers to name the sites they belong to. Some markets seemed to favour multiple

memberships and some seemed to stick to one or two major ones. Others signed up for many. This includes UAE, India, Indonesia, and Bulgaria.

Showing the vast array of social networking niches, the open-ended question about site membership attracted responses naming around 150 sites across the 17 markets surveyed, but naturally some sites stood out as more popular.

Almost unanimously, 91% of Japanese social networkers are on a Japanese-language site called mixi. One of the major features of mixi is that it's invitation only. Because of this feature, mixi's networks are based on friendship in the real world. So it's not used the way some sites are... it's not for broadening networks, rather for strengthening existing networks."

Please see end of release for a table showing the top three sites in terms of membership (as opposed to visits) among social networkers in each market.

## Privacy and Predators

The survey was not all about debunking myths. It also confirmed facts. Privacy concerns and fear of strangers remain barriers to total online comfort for a great many of our respondents. 43% of the South African respondents who knew what social networking is commented that there is a danger in the social networking phenomenon.

Globally, just over half the respondents who are members of social networking sites (51%) agreed that online social networking has its dangers. The Brazilians were the most nervous about online social networking with 79% agreeing there is danger, followed by the US (69%) and Poland (62%). Least concerned are Indians on 19%.

The biggest concerns were lack of privacy (37%) closely followed by lack of security for children (32%). The Dutch were the most concerned about privacy at 54% and lack of security for children was the biggest worry for Americans with 62% of respondents nominating it.

We also asked respondents whether they agreed or disagreed with the statement "I feel comfortable giving out personal details on social networking sites" and found that this makes most people, even those who are social networkers, uncomfortable. Of the group who are members of social networking sites, only 26% are comfortable giving out personal details. This is led by 71% of Serbians and 57% of Indians. 24% of South Africans that are aware of social networking sites are comfortable with giving out their personal details on the net.

Despite this, is social media a marketing dream?

Assuming you have determined that many of your target market are, indeed, social networkers and you know where they can be found, is it worth getting your brand online? Steve Garton says an emphatic 'yes', but do it quietly...

"These strategies work best when the brand listens to social networkers, insinuating the product or service into lots of quiet conversations. One example is BMW on Facebook, where people can drive the car themselves and invite their friends... virtually of course.

"Brands do not want to be overt here."

We asked social networkers around the world whether they noticed site sponsors, advertisements and interactive profile pages. The results were encouraging for marketers.

Overall, 53% of social networkers notice site sponsors. In good news for the sponsors, these seem to have the greatest impact in the US (where 66% notice), Serbia (65%) and Russia and Germany (both 64%).

In addition, two thirds of site members notice advertisements for products. They are most noticed in Indonesia (86%), Poland (83%) and South Africa and Germany (both 80%). They are least noticed in the Netherlands (52%), Taiwan (49%)

and France (40%).

## Online communication, language and friendship

In a series of attitudinal statements we asked whether people agreed or disagreed with statements about communication, language and friendship. The findings well and truly explode the myth that online social networking is all-consuming.

Steve Garton says that respondents who are members of social networking sites have a balanced on- and offline existence.

"Most people online, regardless of culture, have a very strong appreciation of being in the real world. Their attitudes and behaviour show us that the virtual world of social networking can complement relationships, but not replace them. There is no substitute for real life, real friends and real relationships."

Some of the findings were:

- Forty percent of people who engage in social networking agree that online communication can be just as meaningful as face-to-face communication, versus 26% of people who are not members of any of these sites. This is especially high in South Africa (41%)
- When asked if they agree with the statement "Online social networking is better than not interacting at all", it was not surprising that members of social networking sites are far more likely to agree (75%) than non-members at 51%. Half of the South Africans interviewed agreed with this statement. Highest agrees among social networkers are France (86%), Indonesia (84%) and the US and Russia (both 83%).
- Among social networkers in the markets surveyed, almost half (46%) agree that it is easier to make friends online than in person. Only 28% of non-social networkers agreed. Quite a large proportion of South Africans (47%) agree with this statement.
- And who's losing interest? When asked if they agree with the statement "I am losing interest in online social networking", 36% of the social networking site members were in the affirmative; led by Japan (55%), Slovakia (48%), Canada (47%), Poland and the US (45%). Social networkers in Indonesia and France are the least likely to be losing interest in the activity (82% and 79% are going strong respectively). Surprisingly, for such a new phenomenon in our country, a third of South Africans state that they are losing interest
- More than half the social networkers surveyed agreed that people's language skills are deteriorating as a result of online social networking.
- Thirty seven percent of all people from the UAE, 30% of South Africans and 29% of Taiwanese agreed that they had more friends online than they have in the 'real' world.
- Seventy-eight percent of social networkers agree that people are better off doing outdoor activities than spending time in front of a computer.

## About Synovate

Synovate, the market research arm of Aegis Group plc, generates consumer insights that drive competitive marketing solutions. The network provides clients with cohesive global support and a comprehensive suite of research solutions. Synovate employs over 6, 000 staff in 121 cities across 63 countries.

More information on Synovate can be found at [www.synovate.com](http://www.synovate.com) and [www.synovate.com/southafrica](http://www.synovate.com/southafrica).

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