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## European Social Technographics® Revealed

How Europeans Are Adopting Social Technologies

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### EXECUTIVE SUMMARY

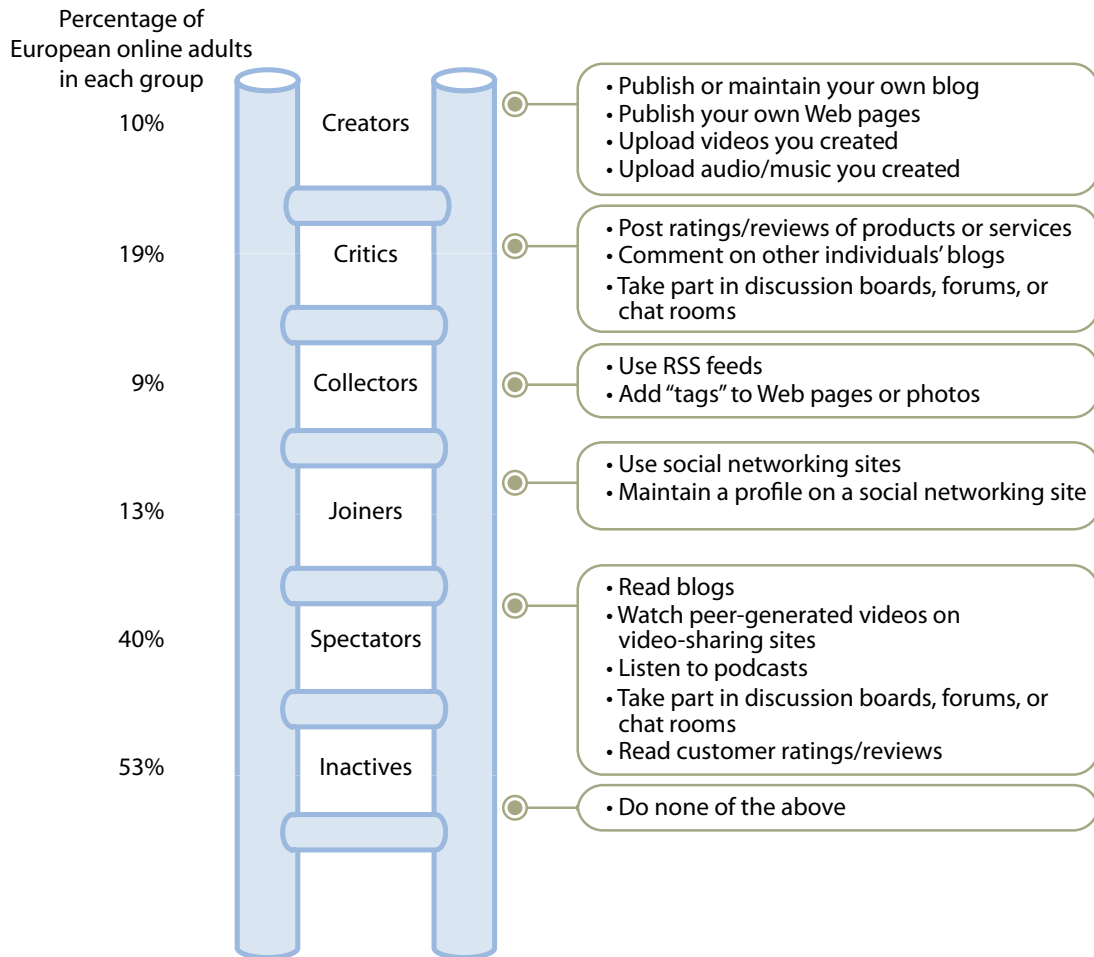
Social technologies, such as blogs, networks, and wikis, already attract a significant percentage of online Europeans. However, to prioritize which Social Computing channels to use to communicate with consumers, marketers need to understand the usage profiles of their target audiences; using Forrester's Social Technographics Profiles will enable them to do so. In Europe, Social Technographics reveals strong differences in social technology adoption among countries. For example, the Dutch respondents were those keenest to join networks such as MySpace, while online Germans were most likely to post comments in forums and on other people's blogs.

### EUROPEAN SOCIAL TECHNOGRAPHICS SHOULD LEAD MARKETER INITIATIVES

Interactive marketers looking to use social technologies need to start with an understanding of where their target audiences currently focus their activities and where they are likely to develop interests in the future. Social Technographics provides a comparable benchmark for marketers to use to evaluate consumers' engagement with social technologies. This analysis profiles consumers along six nonexclusive, increasing levels of participation, from complete lack of interaction up to heavy engagement in original content creation.<sup>1</sup> In Europe as a whole (see Figure 1):

- **Only one-tenth of online users are Creators.** At present, this content-powerhouse group makes up just 10% of online adults in Europe. One-fifth — 19% — of online Europeans are Critics, those who participate in activities such as posting on other people's blogs or writing product reviews. Only 9% are Collectors, individuals who enjoy cataloguing and organizing Web content — for example, tagging articles or using RSS (Really Simple Syndication) feeds.
- **Joiners make up 13%.** Joiners are consumers who have taken the first real leap into interaction with social technologies by joining and participating in the most talked-about type of social technology: social networks such as Facebook or MySpace. Rather than just observing, these users have taken the next step into active engagement.
- **Spectators are the largest group.** More than a third of online Europeans — 40% — are Spectators, consumers who view and read social media content such as YouTube videos and forums but don't contribute. This is the largest single active segment, which suggests that many users start in just observing social technologies for a while before they begin to actively engage. Additionally, around half the online population — 53% — is made up of Inactives, who don't engage with social technologies in any way.

**Figure 1** The Social Technographics Profile Of Online Europeans



Segments include consumers participating in at least one of the indicated activities at least monthly  
Base: 13,254 European online adults

Source: European Technographics® Benchmark Survey, Q2 2007

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Source: Forrester Research, Inc.

### EUROPEAN COUNTRIES' SOCIAL TECHNOGRAPHICS PROFILES DIFFER SIGNIFICANTLY


Of course, many interactive marketers will be most interested in Social Technographics Profiles at a country level. This analysis reveals considerable differences in adoption across Europe, for example (see Figure 2):

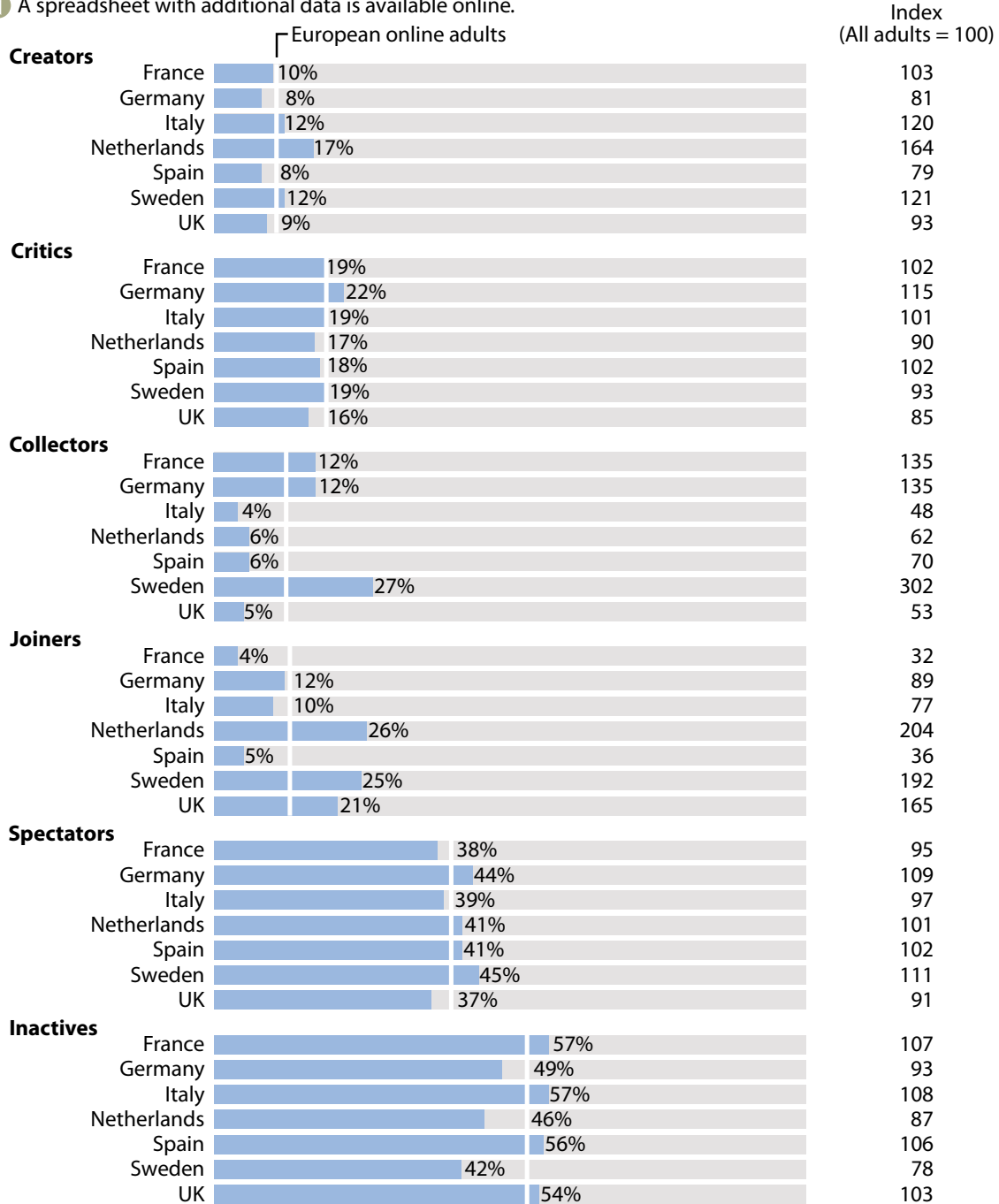
- **UK consumers like networking — but the French don't.** In the UK, 21% of the online population is made up of Joiners, compared with 13% in Europe as a whole. Networks such as Bebo and Facebook enjoy significant success in this market, with Facebook having a unique

audience of 6.5 million online Brits in August 2007 according to Nielsen/NetRatings.<sup>2</sup> However, in France, a mere 4% of the online population belongs to this group. Currently, the dominance of the English language within the most popular networks — Facebook, for example, currently lacks a French or German language offering, although it plans to add these services for 2008 — may be one factor contributing to the lack of multilingual participation.

- **Southern Europeans are less interested in social technologies overall.** In Spain, online consumers are less active in all types of social activities, with just over one-third as many Joiners as is typical in Europe. Italians demonstrate a higher willingness than average to be Creators but are significantly less likely to be Collectors. Interestingly, consumers in these countries are also considerably less apt to shop online than average, which illustrates that, at present, they are generally less willing to engage in sophisticated online activities.<sup>3</sup>
- **Dutch users are the most creative, Germans the least.** Although online Germans have a smaller percentage of Creators, they are also more engaged than average. The low penetration of home broadband in Germany — just 43% — might be the reason for the lower percentage of Creators, as it means that many online users struggle to upload bandwidth-heavy audio and video creations.<sup>4</sup> In the Netherlands, 17% of online consumers are Creators, considerably more than the European average. Encouraging this may be the Netherlands' very high penetration of home broadband: At 75%, it's the highest in Europe.
- **Sweden has the most active audience.** Around 60% of online Swedes engage in some sort of social technology, even if it's just reading a forum, making Sweden the most active European country. Swedes are especially overrepresented in the Collector category, and the country has almost double the European average of Joiners.

**Figure 2** Consumers Exhibit Very Different Social Technology Behaviors Across Countries

 A spreadsheet with additional data is available online.



Base: 13,254 European online adults

Source: European Technographics® Benchmark Survey, Q2 2007

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Source: Forrester Research, Inc.

## RECOMMENDATIONS

### USE SOCIAL TECHNOGRAPHICS TO KICK OFF ANY SOCIAL MEDIA STRATEGY

The Social Technographics Profile included in this report will allow you to gain actionable insights into the social media activities of online Europeans. Now, with these insights in mind, you should:

- **Determine which profiles are relevant to your company.** Looking at the Social Technographics Profiles of your own target markets is the first place to start when determining a social media strategy.<sup>5</sup> Determine how key audiences are interacting now, consider how this is likely to change in the short to medium term, and plan investments around those key technologies.
- **Be ruthless about technology rejection.** If your consumers aren't reading blogs or using RSS and won't be for the next three years, then these social technologies don't call for significant investments. Instead, focus on experimental spending to interact with the small percentage of your audience that is engaged, even if competitors appear to be investing heavily. It's not about which companies can get the most advanced social technologies up and running first — it's about achieving worthwhile engagement with your target audience. If that means putting your CEO's blog-writing ambitions on hold, then so be it.
- **Embrace multiple social opportunities.** Consumers seldom restrict themselves to one social technology, and neither should you. Encourage users to engage and participate in multiple ways. For example, Amazon.com encourages buyers to post product reviews and ratings, but the site also allows less confident users to simply click a button to rate whether reviews were useful or not.

## ENDNOTES

- <sup>1</sup> Many companies approach Social Computing as a list of technologies to be deployed as needed — a blog here, a podcast there — to achieve a marketing goal. But a more coherent approach is to start with your target audience and determine what kind of relationship you want to build with them, based on what they are ready for. Forrester categorizes Social Computing behaviors into a ladder with six levels of participation; we use the term Social Technographics® to describe a population according to its participation in these levels. Brands, Web sites, and any other companies pursuing social technologies should analyze their customers' Social Technographics first and then create a social strategy based on this profile. See the April 19, 2007, "[Social Technographics](#)" report.
- <sup>2</sup> Source: "Facebook is now UK's most popular social network," Nielsen//net ratings UK, September 25, 2007 ([www.nielsen-netratings.com/pr/pr\\_070925\\_UK.pdf](http://www.nielsen-netratings.com/pr/pr_070925_UK.pdf)).
- <sup>3</sup> The majority of European shoppers live in Germany or the UK, and Sweden and the Netherlands show the largest increase in online shopping in the past year. See the August 30, 2007, "[European Online Shopping Landscape 2007](#)" report.

- <sup>4</sup> There is still huge potential for growth in Western European residential broadband adoption, despite a slowdown in the majority of national markets. See the December 12, 2007, “[Western European Residential Broadband Forecast: 2008 To 2013](#)” report.
- <sup>5</sup> Executives are going about social strategy backwards: choosing technologies like blogs or communities first, instead of focusing on what they want to accomplish. This document introduces our four-step method for social strategy. First, examine the Social Technographics Profile of your customers. Second, choose your objective: listening to, talking with, energizing, supporting, or embracing your customers and their ideas. Third, build a strategy around changing your relationship with your customers. Finally, pick the appropriate technologies to implement. Companies that take these four steps in order and then put success metrics in place are the most likely to succeed. See the October 9, 2007, “[Objectives: The Key To Creating A Social Strategy](#)” report.