



# Social Media **Insight 2009**

 Social Media Library™

prca 

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# Foreword

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**Danny Rogers**  
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The UK PR industry faces many challenges - recession, globalisation, competition from other disciplines - but social media should be seen as a huge opportunity for 2009.

As a marketing discipline, PR has been in the ascendant for the past five years, largely because businesses and politicians recognise that they must engage in the 'new conversations' to maintain, and enhance, their reputations.

The explosion of new digital media has meant that these conversations now take place globally, 24-7 and the speed of exchange is ever-accelerating.

This plays to PR's strengths which are: the ability to monitor and influence opinion on an ongoing basis; and the ability to build the right relationships to achieve the former.

Last year WPP boss Sir Martin Sorrell attributed the growing strength of PR to digital media, which he said had created growing interest in 'editorial marketing'. PR's growth rates this year continue to reflect this.

For 2009 Twitter has quickly become the favoured media for 'new conversations'. PR professionals must embrace it as they have other new comms channels.

Because if they do not, there are other marketing disciplines that surely will.

Social media has evolved to a level that it now impacts on the very fabric of our everyday lives. The proliferation of blogs, forums, podcasts and social networks crosses generations, occupations and interests, throughout the UK and Ireland.

This steadily is changing the way we interact with one another and the way we view the world.

Whereas previously, people learned of news and events predominantly via traditional media outlets, in this highly networked world, people digest information from a far larger number of sources.

People can be found online collecting around almost any topic imaginable. And the ways that they communicate, the nuances, culture and associated ethics, are constantly shifting - as the technologies underpinning social media continue to evolve.

This presents both a challenge and an opportunity to brands. Here now is a very personal, engaging platform to reach your customer base. But to make full use of this, it is first vital to get a clear view of the social media landscape. What exactly does it look like? In what way is it relevant to me?

I hope Social Media Insight 2009 helps answer these questions and more.

# Introduction to Social Media Insight

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Welcome to the first comprehensive report into social media in the UK & Ireland. This document offers a snapshot of just how widespread the use of blogs, podcasts, social networks, forums and other online social platforms is in 2009, and how and where people are consuming them.

Never before have these statistics been available in one place as a resource for all marketers who are looking to harness the growing power of digital social media. The proliferation of participants across all major sectors shows wide-ranging take-up of social media in 2009; marketers and PR people can no longer afford to ignore this groundswell.

People frequently discuss brands online, and a growing number of brand-owners want to ensure their own voice is heard as part of that conversation. If companies see traditional media as a key part of their marketing mix, they should also want to be part of the social media scene.

The breakdown of social media topics and geographical information contained in the report was compiled solely using data from Social Media Library in January 2009. Social Media Library provides PR and marketing professionals with unique, up-to-date information on the most influential social media sites in the UK. Closely broken down by topic, the service identifies where target audiences are interacting online.

For more information about this report or Social Media Library visit [www.socialmedialibrary.co.uk](http://www.socialmedialibrary.co.uk) or call 020 7927 9010.

## *What is Social Media Library?*

Social Media Library is the UK's first ever directory of blogs, forums, social networks and podcasts.

It provides PR and marketing professionals with unique, up-to-date information on the most influential social media sites in the UK. Closely broken down by topic, the service identifies where target audiences are interacting online.

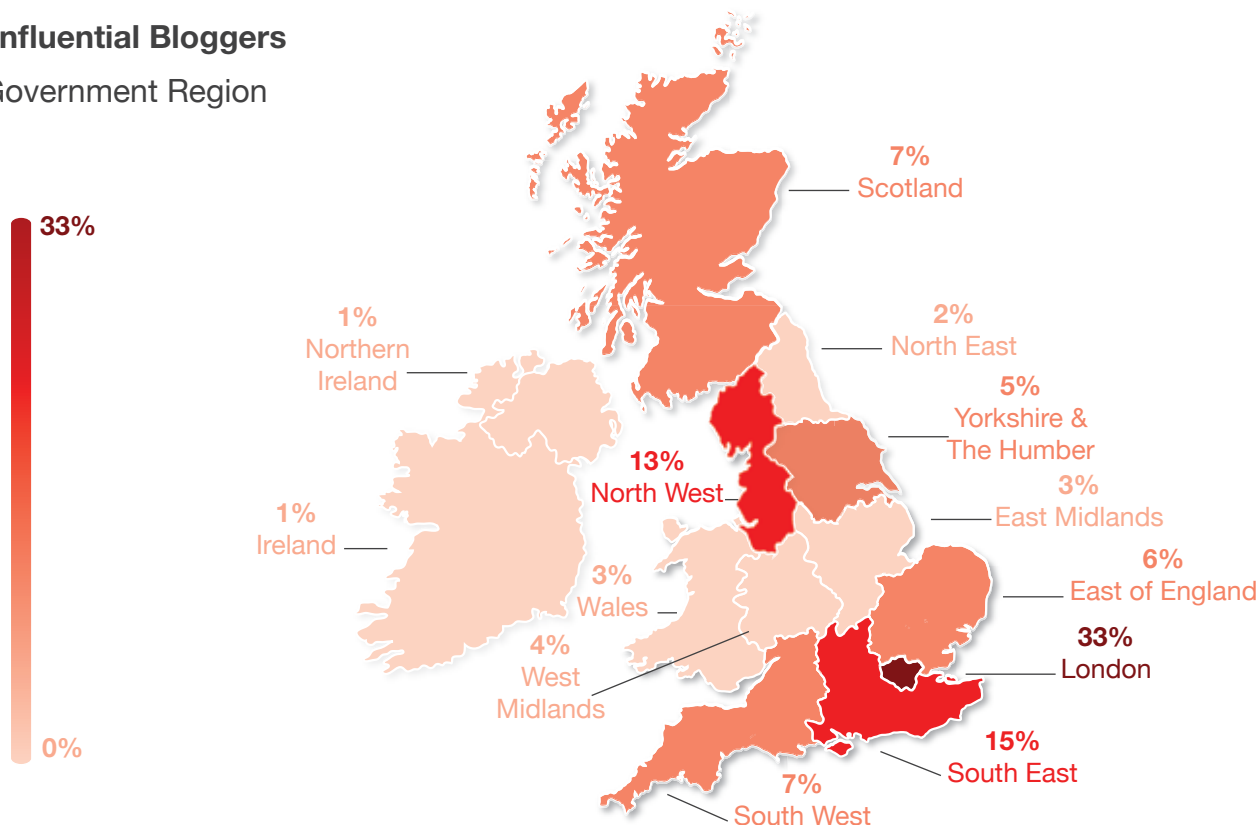
Social Media Library provides all of the information you need to integrate social media fully into your PR or marketing campaigns.



# UK Blogging Activity

## UK Influential Bloggers

By Government Region



Blogs - shared online journals - have been around for the past few years, embraced not just by consumers but also influential media commentators and the business community.

A third of influential blogs are concentrated in London, a high proportion for a city that can only claim around 10% of the total population of the UK & Ireland. Overall, the South of England accounts for more than half of all influential blogs. The Midlands as a whole clearly has some catching up to do, but the North West can claim a healthy 13%. Much of this can be attributed to the buoyant music, media and cultural scenes of Manchester and Liverpool, the region's biggest urban centres, which has spawned associated blogs.

Outside England, there is a low concentration of influential blogs. Scotland, however, outstrips Wales, Northern Ireland and the Republic of Ireland combined, with 7% of the total.



### BlogScore™

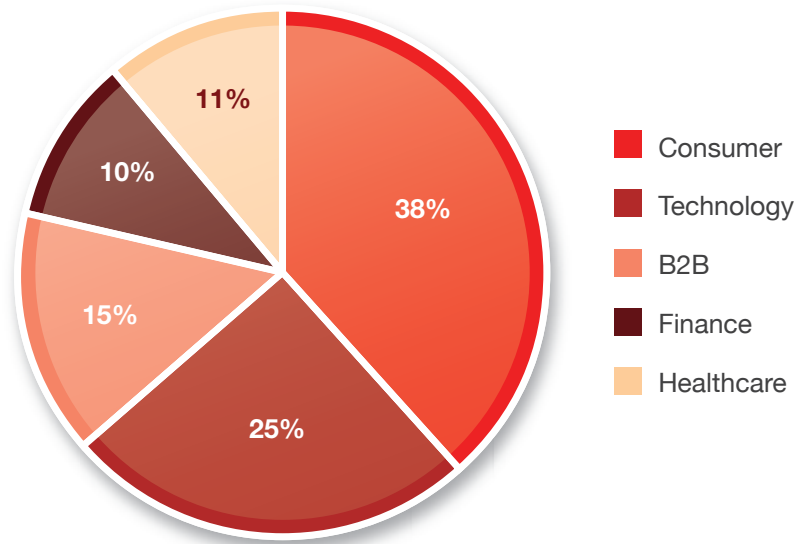
The Social Media Insight report's breakdown of UK blogs was compiled using Social Media Library's unique BlogScore ranking system. It provides an easy measure of both a blog's influence and its visibility in search engines. So, for example, a top score of 10 indicates a blog that is highly regarded by other, relevant influential sites, in addition to a high propensity to rank well in search returns. It should be noted that this report only contains data and analysis regarding blogs considered influential by Social Media Library, rather than every blog available to read in the UK & Ireland.



# UK Blogging Activity

## Influential Bloggers

By Sector



Nearly 70% [Nielsen//NetRatings] of the UK population has access to the internet and blogs have become a way for these disparate individuals to communicate, follow the latest trends or search for information and advice. Consumer topics make up 38% of UK blogs, and a more detailed breakdown of these subject areas can be found on page 8.

Consumers who originally used forums and chatrooms as discussion shops in the early days of online communities have graduated seamlessly to writing or consuming blogs on issues close to their hearts. However, consumer blog numbers are

perhaps not as far ahead of the business-led figures as might be expected.

The technology community makes up a quarter of all blogs. These people too were early adopters, feeling comfortable with logging their thoughts in the transparent online world. But there is a healthy spread of topics elsewhere: business is also embracing blogging in greater numbers. The corporate community is beginning to get to grips with the technology behind blogging and the potential for businesses to reach out into the blogosphere is growing.

Meanwhile, financial blogs are taking off, currently with a 10% share, and this could well grow as personal and global economic issues dominate the news headlines. Blogs are also important for healthcare professionals and patients alike. Health concerns are a part of many people's daily lives and the shared experience is becoming part of coping.

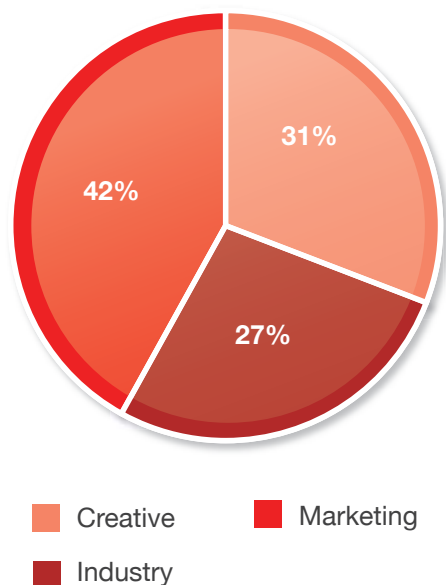
### *Influential blog snapshot*

- > 38% of influential bloggers are writing about consumer-focused issues
- > 25% are sharing their thoughts on technological matters
- > The third biggest group is b2b bloggers at 15%

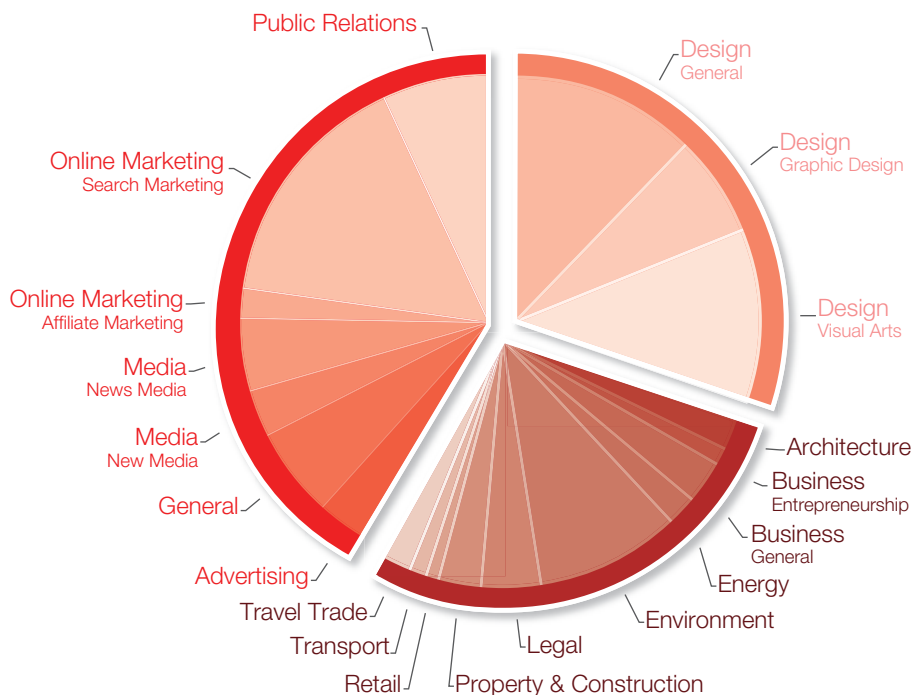
# UK Blogging Activity

## B2B Focused Blogger Activity

By Topic



By Sub Topic



As shown on page 6, b2b blogs make up a substantial chunk (15%) of the breakdown of overall topic areas. Much of this is the result of media, marketing and creative professionals using both the visual power and reach of the web to post the latest developments, ideas and thoughts – 73% of b2b blogs are in these sectors. These people were early adopters of social media and have been keen to experiment with each new digital development.

But the remaining 27% of b2b blogging comes from a spread of other industrial subject matter. One of the most interesting factors is the rise of corporate blogs about the environment. b2b blogs on the environment make up some 35% of all the industry blog share, and 9% of the overall b2b subject matter.

Green issues are an emotive subject area which lends itself to passionate content from bloggers, and response from their readers. Businesses must be careful they are not just seen to be giving lip service to the environment. Still, the web remains the perfect medium for organisations to show off their green credentials and considerations.

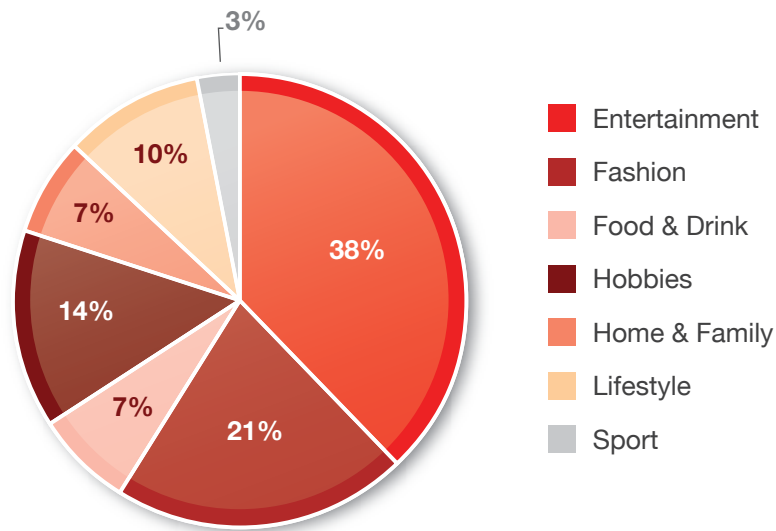
### B2B blog snapshot

- > 42% of influential b2b blogs are on marketing (including media and PR)
- > 31% of b2b blogs are focused on creative subjects
- > Blogs on the environment make up 35% of all b2b industry blogs

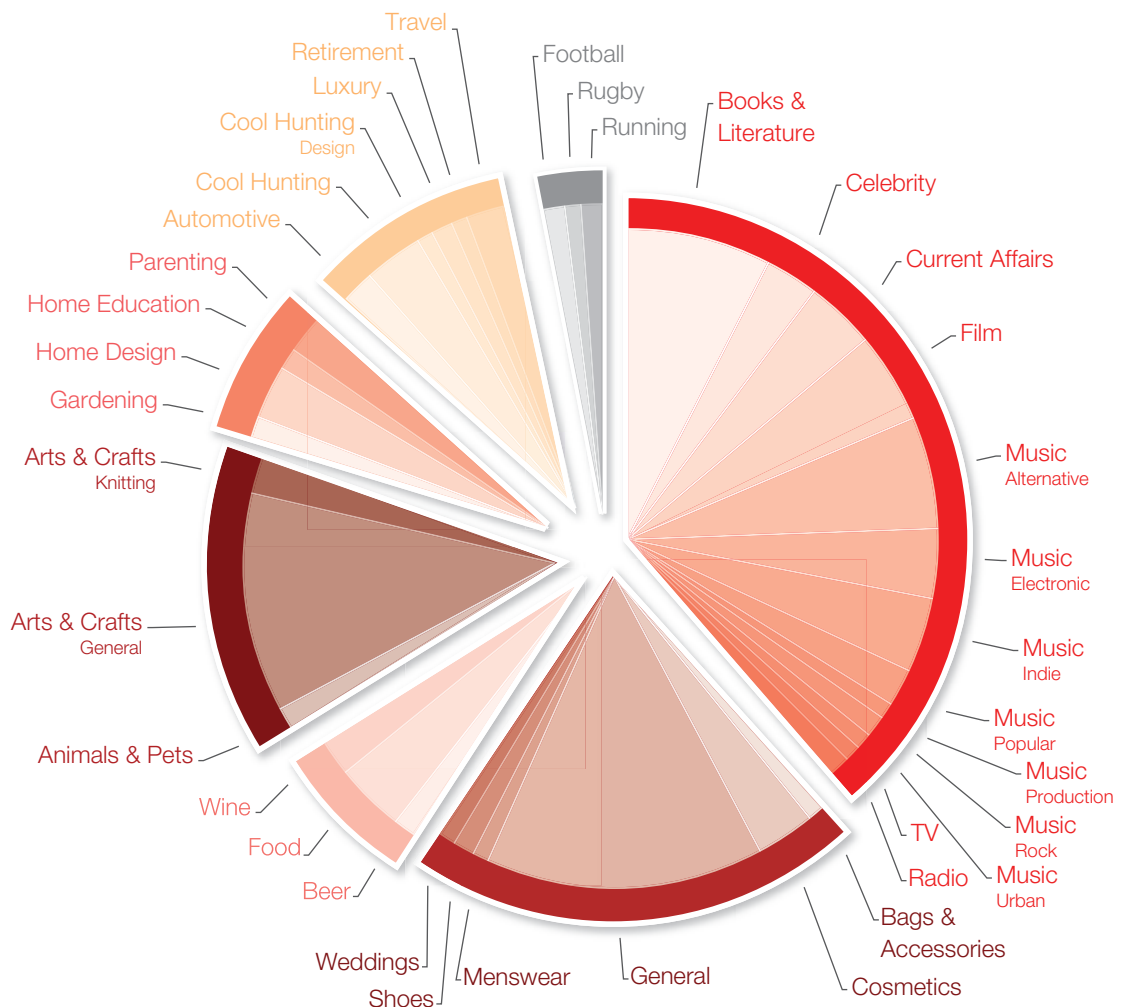
# UK Blogging Activity

## Consumer Focused Blogger Activity

By Topic



By Sub Topic





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The UK is fast becoming a nation of bloggers. There is widespread take-up among consumers across a wide and ever-growing range of subjects. The breakdown opposite reveals people are blogging about almost every consumer-focused topic imaginable.

Entertainment - a primary use of the internet - is the largest single umbrella group and has a share of 38% of the total consumer blogs. Music is clearly the most popular area, garnering 45% of the entertainment blog spectrum. Music has long been a central plank in UK culture, an important social bond, and is now a vital part of the fabric of the blogosphere. Digital media drives modern music so it is perhaps no surprise that it is reaching critical mass among bloggers as people share files and discuss the latest trends.

Books and literature are also well represented by consumer blogs (8% of total consumer-focused blogs). Book clubs were a fixture in the days before mass communication, and these sites are a digital extension of that. Book publishing and marketing are now big areas of culture - thanks in no small part to a certain boy wizard - and reading is part of many people's leisure activities.

Fashion is also big online, owning a share of more than a fifth of consumer blogs (21%). It is very visual, lending itself perfectly to digital media. Modern aspirational culture - encapsulated by TV shows like *Sex & The City* - has created huge interest in personal image and latest trends, and the web is a vital discussion platform. More and more people are keen to document their personal fashion choices online for the world at large to see, and blogs are a great way to raise your own profile.

The next biggest topic area almost runs counter to that chic-chasing group of fashion bloggers: arts & crafts. It may post an eye-opening 13%, but this can be explained by the large numbers of

over-50s embracing the online experience as part of their leisure time; some 225 million hours were spent online in just one month during 2007 by this age group [Nielsen//NetRatings]. Considering the distribution of knitting fanatics in any normal neighbourhood may be quite low, the internet appears the perfect tool for forming interest groups. Another growing area is scrapbooking - people literally taking photos of things they have made or done and posting them online as a virtual collection.

There is also a growing trend towards blogging on lifestyle. It is mainly used for posting thoughts on personal preferences, as well as predicting and following the next big thing, from trainers to boutique hotels. This is a process known as 'cool-hunting', which makes up 3% of overall b2c blogs. Like fashion, these blogs are very trendy and aspirational, offering a window on the writer's world.

Sport is also starting to make an impression in 2009 and currently totals 3% of consumer blogs. One reason that it hasn't taken off to a greater extent so far is that the internet is not yet a natural place to watch sport, so there is no mass appeal. Another explanation could be that, while football and rugby are favoured fodder for pub discussions, blogs are led more by individual musings than banter.

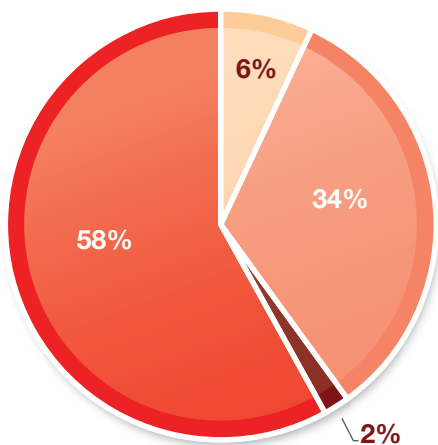
### *Consumer blog snapshot*

- > 45% of entertainment blogs cover music
- > 21% of consumer interest bloggers write about fashion
- > 13% of consumer blogs are on arts & crafts

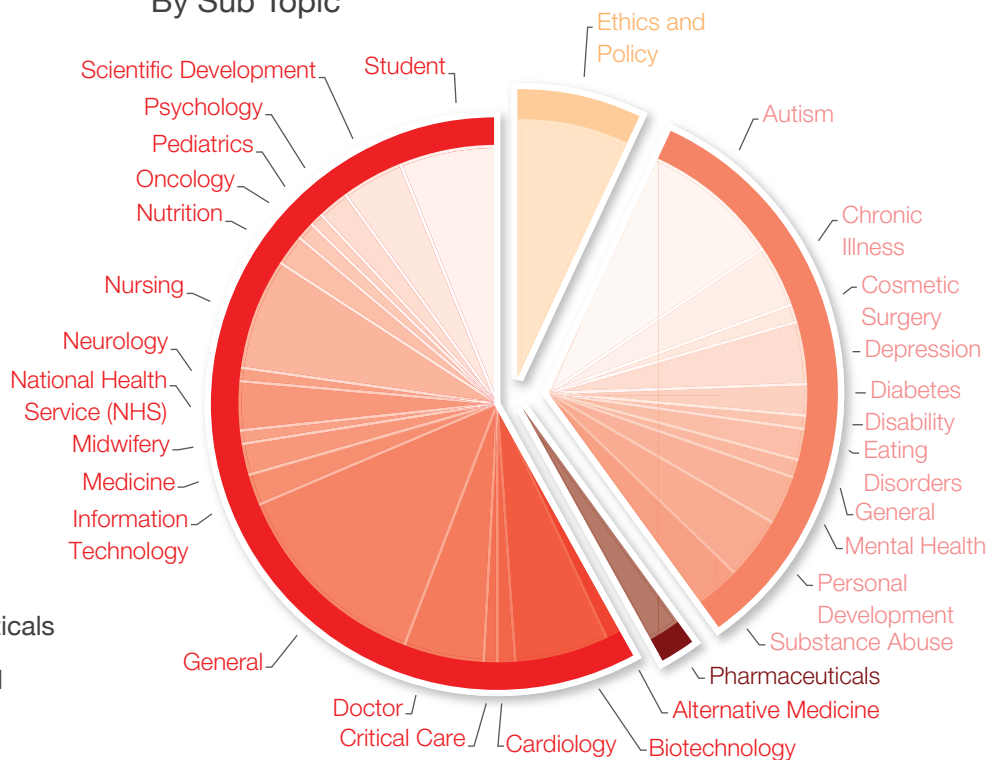
# UK Blogging Activity

## Healthcare Focused Blogger Activity

By Topic



By Sub Topic



IT and health have not been the most harmonious of bedfellows in recent times, with government projects to join up the NHS often coming in late or over budget. But healthcare professionals have jumped on the blogging bandwagon and many now consider discussing their experiences of the sector to be essential – so much so that 40% of healthcare blogs fall into the ‘professional’ category.

Few subject areas provoke deep feelings like the UK’s health system, which touches most people’s

### Healthcare blog snapshot

- > 58% of healthcare blogs are of a professional nature
- > More than a third (34%) are written about patient issues
- > 6% of healthcare bloggers are students

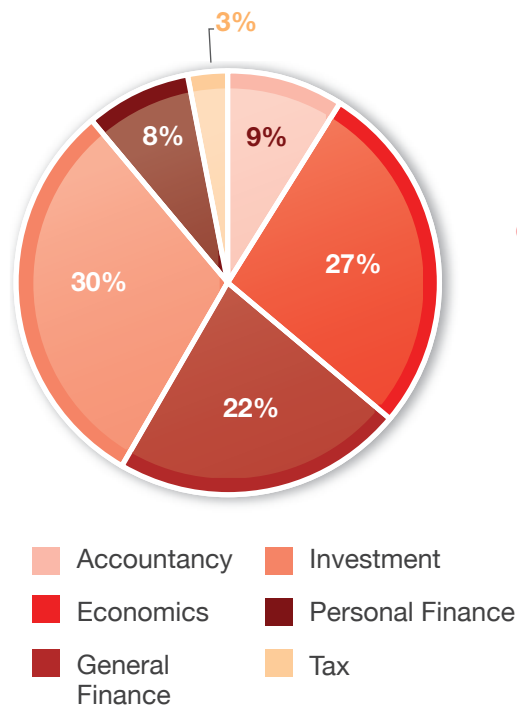
lives at one time or another. Well over half (58%) of health blogs overall are encompassed by a range of niche subjects from midwifery to neurology, with participants seeing the net as a place of interesting discussion, or anonymous catharsis away from the stress of their everyday roles. The pharmaceutical sector (at less than 1% of the healthcare blog total) still has relatively narrow coverage, reflecting the lumbering and very secretive nature of the industry.

The other major user group is patients (a combined 18% of healthcare bloggers). They turn to blogs to discuss both good and bad experiences of treatment, as well as seeking advice from other people. Parents in particular tend to see health blogs as virtual support groups. Perhaps by accident rather than design, the web is being embraced by the public as a source of patient empowerment - for years the government’s intended holy grail for the NHS, with people making their own choices for treatment and wellbeing.

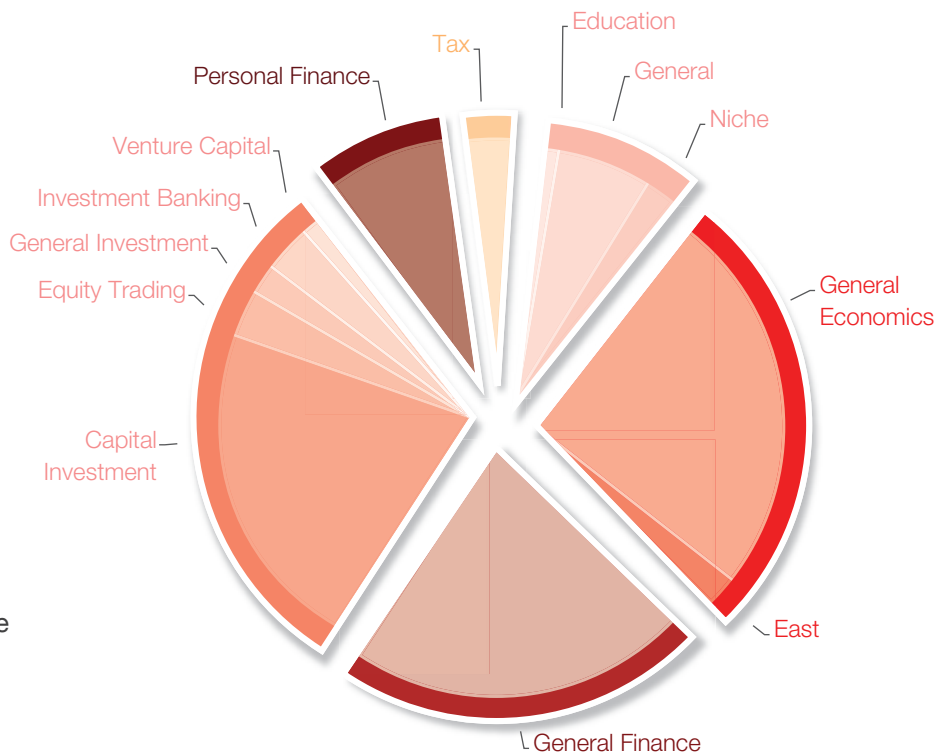
# UK Blogging Activity

## Finance Focused Blogger Activity

By Topic



By Sub Topic



Financial blogs would appear to be the domain of industry professionals rather than the consumer. There is a natural reticence among many people about discussing their personal circumstances online, just as some individuals remain reluctant even to make purchases via the web. Personal finance makes up just 8% of the financial blogs.

The biggest single blog group is investment. The global nature of the internet has transformed life in the stock markets, and professionals are now using it as a way of talking about all manner of relevant subjects. Scuttlebutt via blogs on investments, commodities, best share deals and economic conditions in general are very influential among traders, brokers and hedge fund managers, and have a direct impact on the market.

Tax and accountancy remain quite niche subjects for inclusion in lengthy blogs. Meanwhile, general economics has become a big discussion area, making up 27% of financial blogs. These will largely be academics, politicians and other interested individuals laying down their thoughts on national and global fast-moving macroeconomic issues.

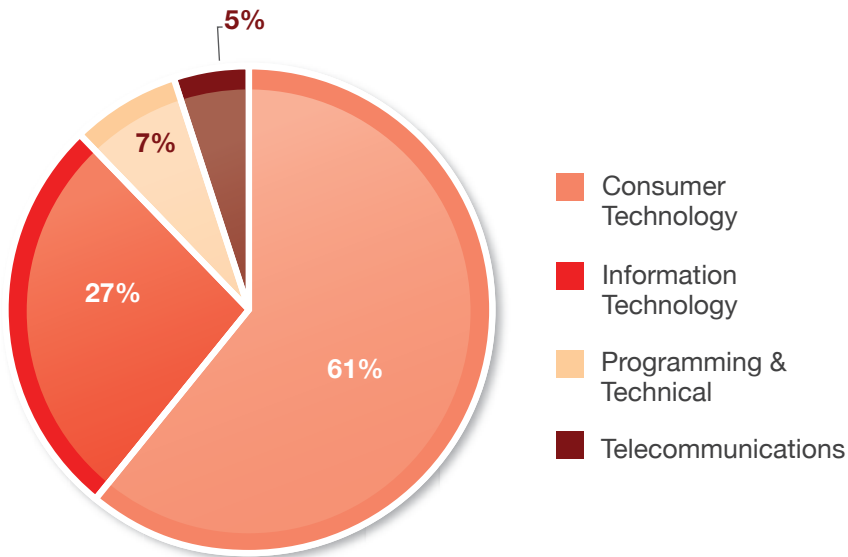
### Financial blog snapshot

- > Almost a third (30%) of influential financial blogs are about investment issues
- > 25% of financial blogs are about general, or macro-, economics
- > 8% of financial bloggers discuss personal finance issues online

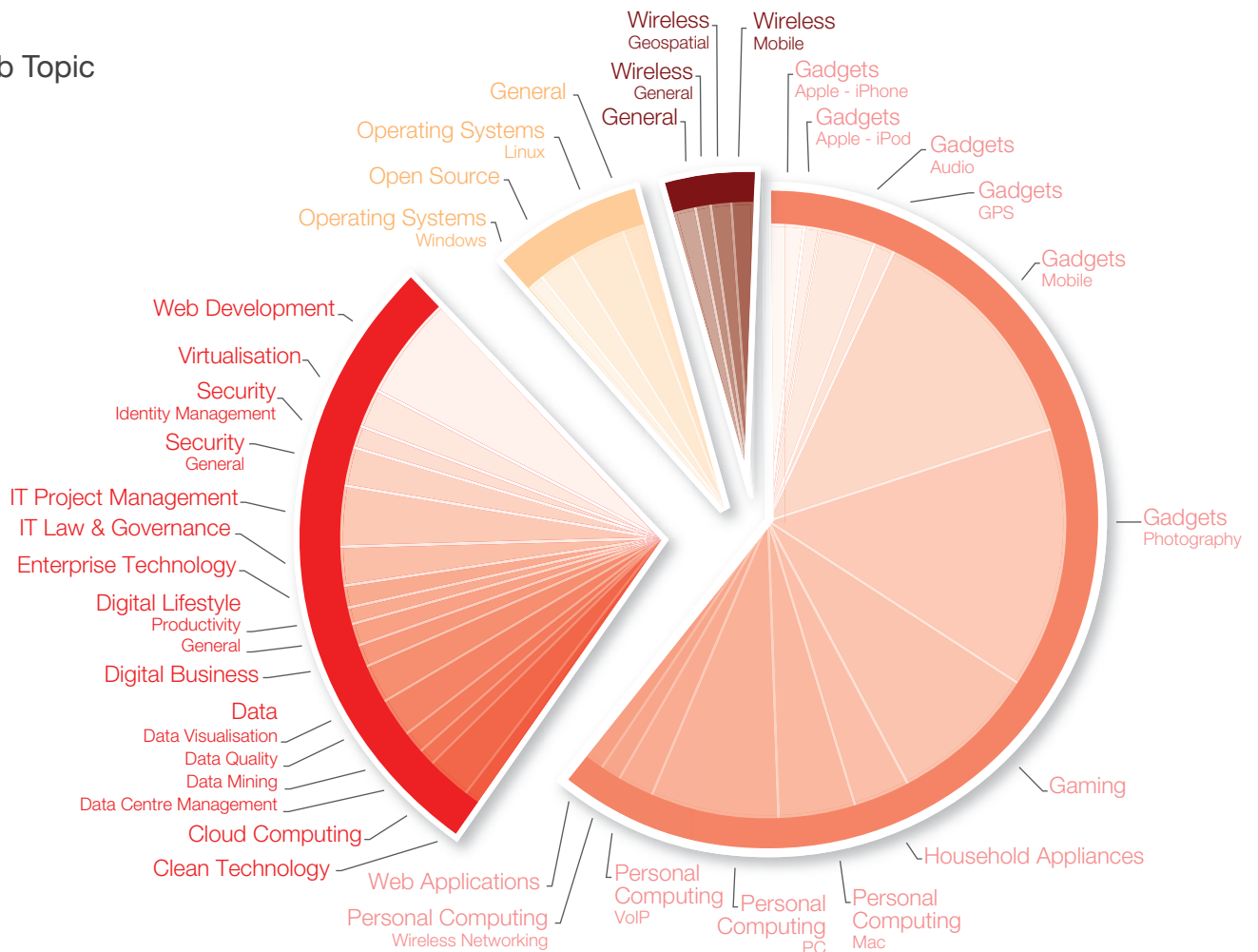
# UK Blogging Activity

## Technology Focused Blogger Activity

By Topic



By Sub Topic



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The explosion of gadgets, from mobile phones to MP3 players, and their central place in everyday life is reflected in the breakdown of technology blogs in the UK & Ireland. Consumer technology makes up almost two thirds (61%) of the whole gamut of tech subjects. Of that figure, more than half of the blogs are about gadgets, be that iPods, phones or other devices.

Look at the rise in the number of standalone gadget mags, supplements and sections over the last decade: boys and their toys is certainly a growth area in publishing and that has spilled over onto the web as people discuss the latest gear, what works and what doesn't. People like to be seen as experts; it's all part of the wider use of the internet as a place where people can recommend or reject things to their friends, colleagues and contemporaries - something for marketers to bear in mind when surveying the social media scene.

Photography is also one of the more popular blogging areas, making up 15% of the technology blogs. It's a natural fit; the category has grown due to the rapid improvements and accessibility of digital cameras in recent years, while visual information works well online. The other main consumer tech area popular among bloggers is personal computing (14% of tech blogs), from computers themselves to posts about internet-based telecoms such as Skype.

IT is another boom area for blogging, with many small topic areas comprising over a quarter (27%) of the total blogs in this sector. These are very niche communities with specialist interests ranging from cloud computing and data centre management, to web development and security issues. It's important to recognise that people posting in this area are mostly working in technology anyway, so blogging is no great leap for them. They understand new communication channels and how to get the most out of them.

Programming and technical blogs appear to be a growing area, even though they only account for 7% of the breakdown. These are niche subjects but are passionately considered by bloggers; technical aspects of computing such as Open Source and Linux are more important to them than discussions about Windows as a focus topic. Meanwhile, wireless communications are growing quickly, and as wi-fi technology develops and reaches critical mass with consumers, its 5% share of the tech blog space is sure to increase.

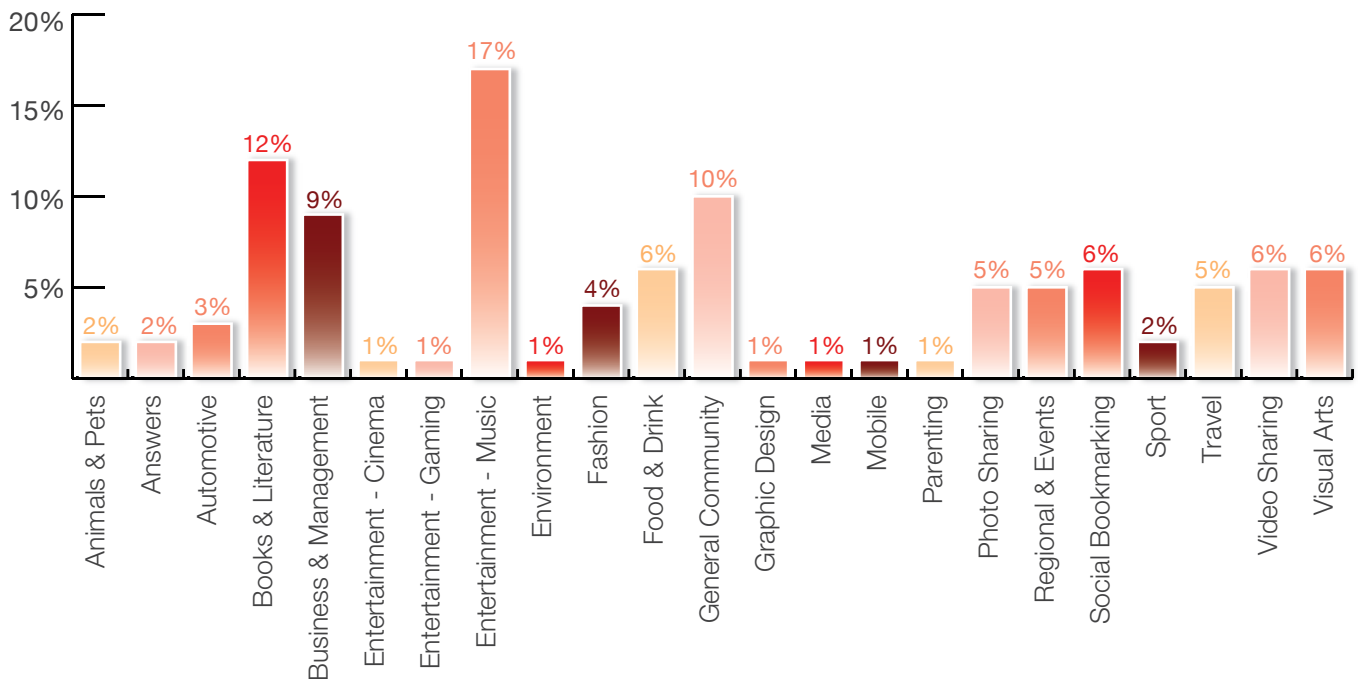
### *Technology blog snapshot*

- > Consumer technology is huge in the blogosphere, making up 61% of this area
- > 27% of technology blogs are about IT-specific issues
- > 15% of technology blogs are about photography

# Social Networks

## Influential Social Networks

By Topic Area



Social networks are online communities of people who share similar interests. While most people have heard of YouTube or Second Life, there are many others that have attracted significant user bases in the UK. By far the biggest area is music. As stated on page 9, music is a major influencer of social culture and has a massive following in all its guises; do you know anyone who doesn't enjoy music of some description? Music translates well to the web, provokes discussion and is also boosted by massive amounts of file sharing via these networks.

While music garners 17% of UK social network sites, books and literature make up 12%. The traditional book club is alive and well in the virtual space. Once again, visual as well as audio media is also a popular area. The boom in digital cameras and imaging technology has led to the rise of photo sharing sites such as Flickr. Late in 2008, the site was estimated to hold some 3 billion images. Curiously, social networks for films have yet to really take off.

General communities include high-membership sites such as 2008 success story Facebook, and some for kids, such as Bebo. The use of social bookmarking sites is also on the rise. Delicious and Digg are two places where more and more people are storing or sharing links to their favourite content.

Meanwhile, business and professional networks such as LinkedIn are also showing signs of rapid growth.

### *Social networks snapshot*

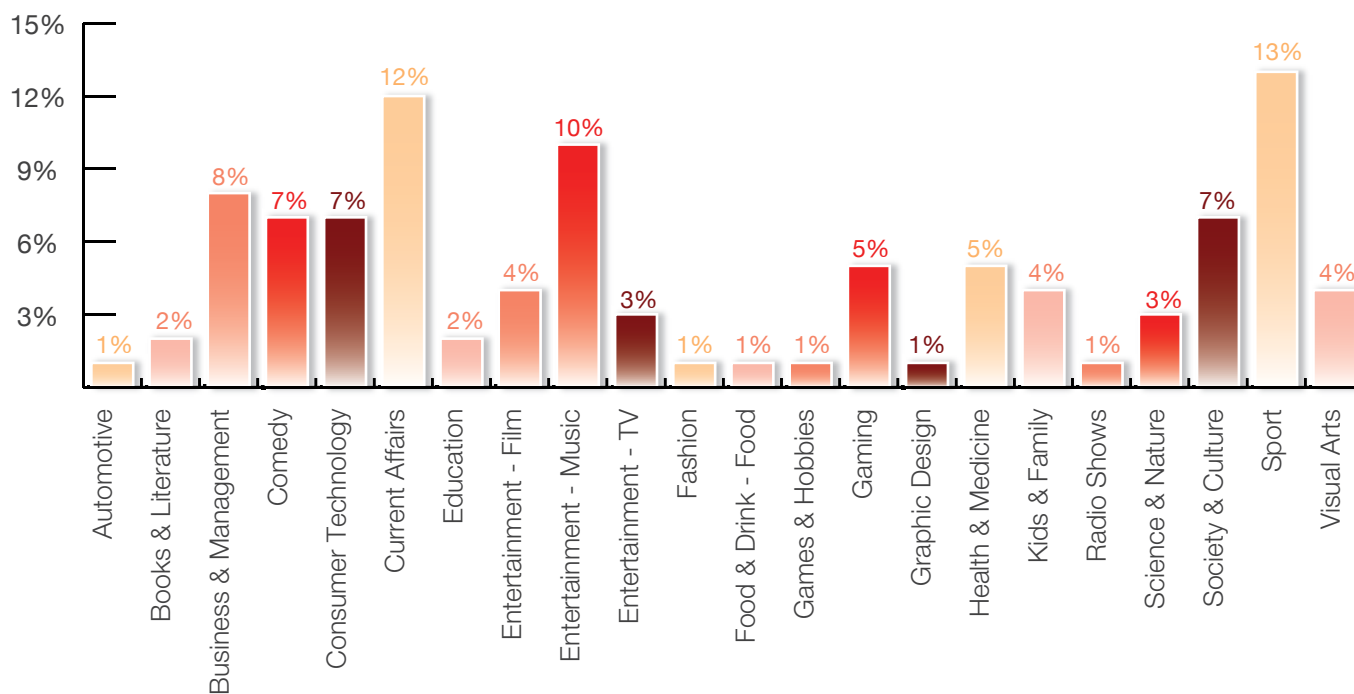
- > 17% of influential social networks focus on music
- > Books and literature is the second biggest topic area (12%)
- > 9% of total influential social networks are business-focused



# Podcasts

## Influential Podcasts

### By Topic Area



Podcasts have really grown in importance in the last two years. The platform's popularity has exploded with the digital media of online and podcast-supporting devices working in tandem to great effect.

Current affairs (12%) is among the most popular podcast topic, and this is largely thanks to the wave of media companies that now offer downloads as part of their news service. Media players such as the BBC's iPlayer have developed a large following.

Business and management (8%) also stands out. Podcasts are sought after among this audience because they have little time during the day to spend on catching up with the latest developments, so it can be easier for them to download content and listen to it in transit when they are less likely to be disturbed.

Education is another interesting area. Traditionally, auditory courses have been a successful way of learning a new language, for example, and this seems to have been embraced by the online community as well. Meanwhile, music fans (10%) see podcasting as a viable way of catching up on their favourite shows via what is essentially a music device anyway. Sport (13%) also has a good showing. People prefer catching up with results and highlights via podcasts, even if in a lot of cases they are not yet able to watch entire sportscasts online.

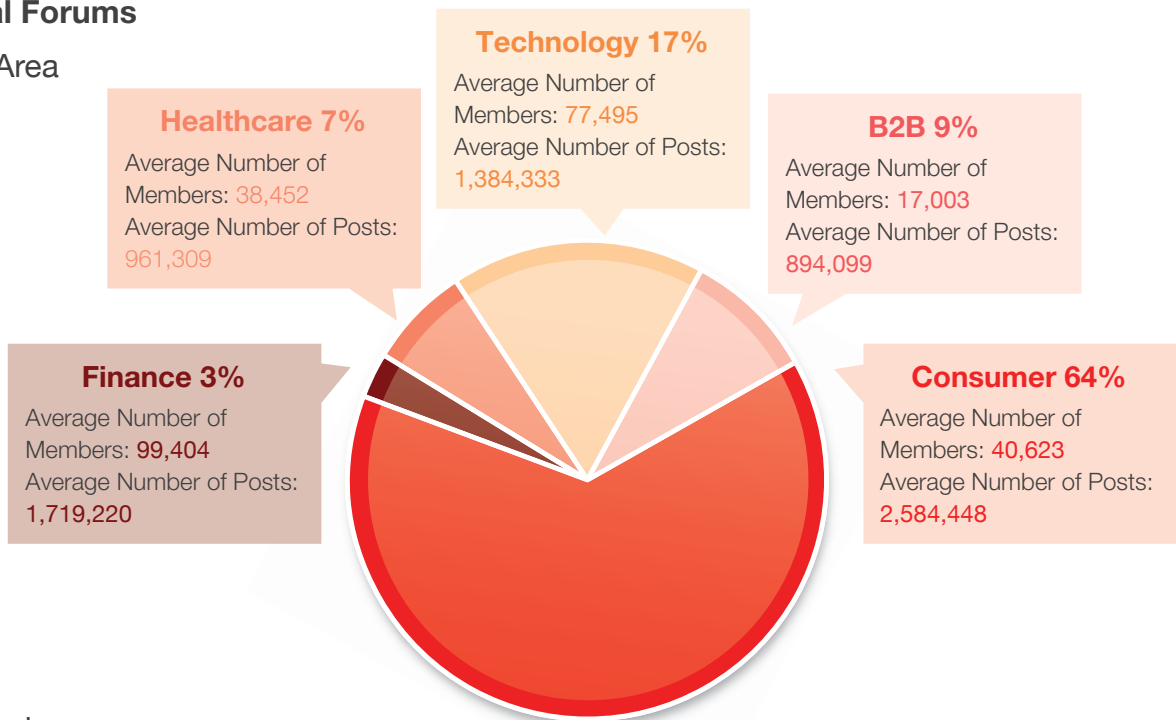
### Podcasts snapshot

- > Sport is the top-ranked podcast subject area with 13%
- > One in 10 influential podcasts are music-related
- > 8% of influential podcasts concern business and management

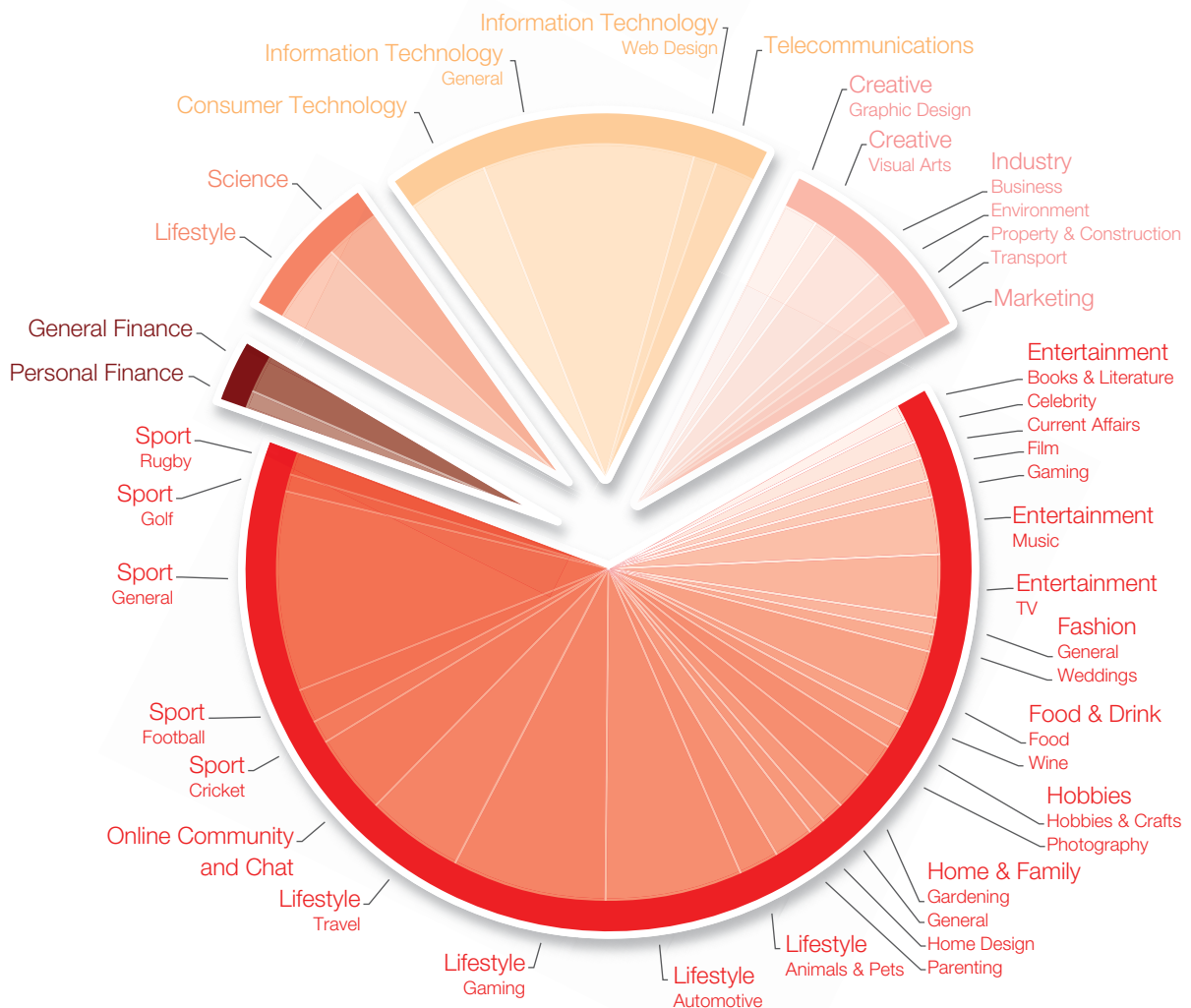
# Forums

## Influential Forums

By Topic Area



By Sub Topic



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Forums have been around for some time. They could be viewed as a precursor to the more in-depth blog, and millions of people are getting involved in 2009.

Consumer discussion groups make up nearly two thirds (64%) of all UK & Ireland-based forums, and while some are not as big as their counterparts in finance and technology in terms of members, the average 2.5 million posts eclipses any other type of forum on the web. These are in-depth, high-volume, sustained discussions about topics du jour, from thoughts on current affairs to problems with pets. Forums are essentially a non-threatening environment where people can swap ideas on a subject as and when they please, without either feeling under pressure to churn out a blog, or say something succinct that will live long in the memory. They are the natural home for online chit-chat.

For that reason, sporting discussions make up a good percentage of the consumer forum topics. It's more like the friendly banter that you would hear down at the pub. Sports fans have evidently taken to forums more than they have warmed to blogging (see page 9).

Other, lighter subjects such as lifestyle, home interests, and food and drink also make it onto the list. Interestingly, music is not so well represented as it is on social networks or blogs; perhaps there is less facility for file sharing, or maybe the forum is now seen as a bit outmoded by those at the cutting edge of music culture.

The second biggest forum grouping is technology with 17% of the overall total. These are populated by people who spend a lot of time in the virtual space anyway and prefer to use it to keep in touch with friends and colleagues, sharing complex issues and advice. They are early adopters who feel comfortable conversing online.

The number of healthcare forums is not as significant as this subject area in the blogosphere, with only 7% of the total topics. Yet even though finance equates to only half of the health total, members of finance forums outstrip those on health sites by almost three to one, and average posts are almost double. There are a small number of financial forums, but they are intensely active: witness the success of Moneysavingexpert.com for one. Once these sites have gained traction they become huge, and in the current economic climate where people are seeking help from all quarters, they are likely to grow further.

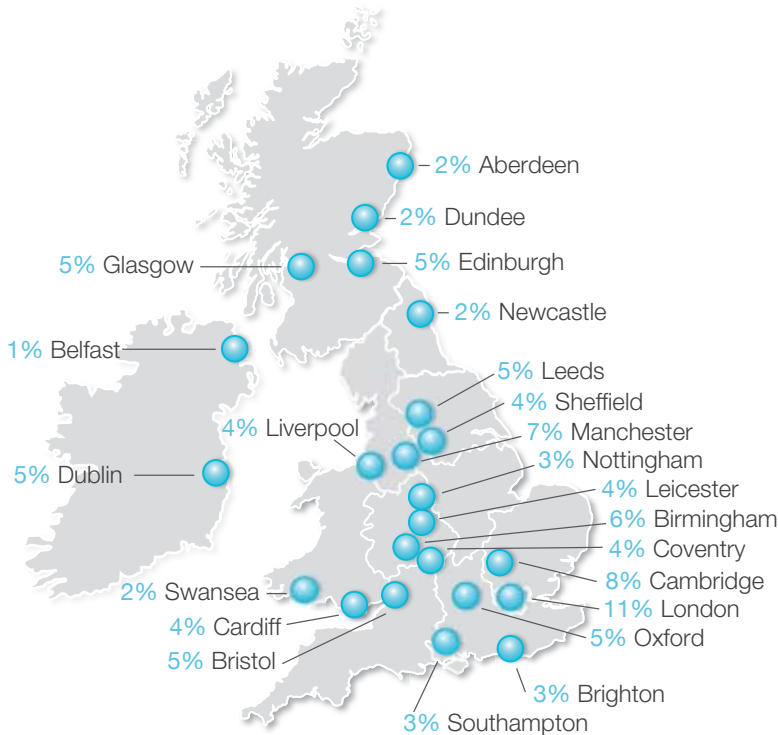
### *Forums snapshot*

- > 64% of forums are about consumer topics
- > Nearly a fifth (17%) are on tech issues
- > Finance blogs have the lowest overall share of forum topics – but the second highest average posts (1.7m)

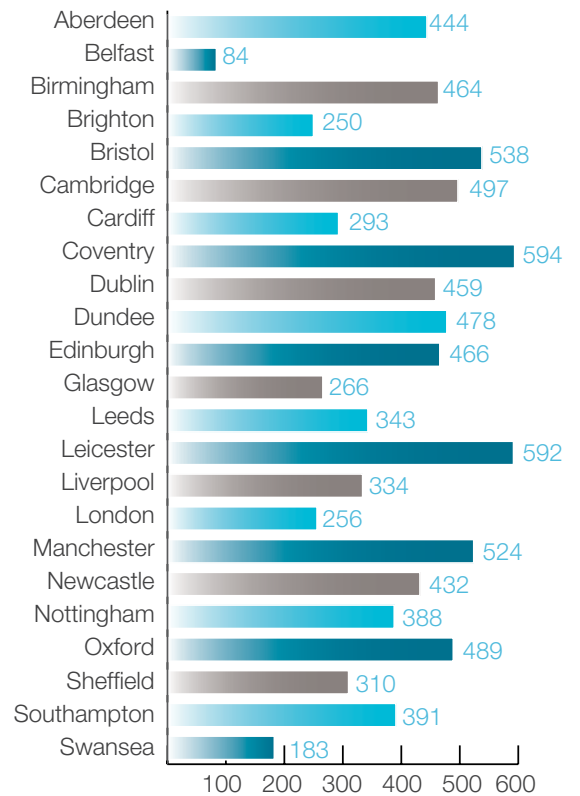
# Twitter

## Dissemination of UK Twitter Users

Twitter Users by UK City



Average Number of Followers by UK City



Twitter was one of the major online winners of 2008. The free instant-messaging and mini-blogging service increased its traffic almost 1,000% in the space of a year. It is now favoured by many celebrities - such as Stephen Fry and Jonathan Ross - who see fit to post snippets of information about what is on their mind at regular intervals throughout the day.

### Twitter snapshot

- > London has the highest share of Twitter users in the UK with 11%
- > Scotland can claim 16% of all UK & Ireland Twitter users
- > Coventry has the highest average number of followers with 594

Just as with blogs (see page 5), London is top for Twitter users with 11% of them living in the capital, but there is far more even distribution across the UK & Ireland. Cambridge has the second highest concentration after London, which could be something to do with the large technology community in the city.

Meanwhile, the breakdown of 'followers' - people who tune into other users' tweets for regular updates on their activity - is just as intriguing. Coventry and Leicester record the highest average number of avid followers, each at just a shade under 600. London, despite having the highest proportion of people posting on Twitter, lies towards the bottom of the list when it comes to major followers.

# Conclusion

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There is clearly huge and growing take-up of many types of social media throughout the UK & Ireland. Online networking, information and advice sharing has finally come of age. As long as technology satisfies people's desire to communicate with each other and have access to instant content, the clamour is sure to continue. Other trends include:

- > The UK's cities have embraced blogging; major urban centres have the biggest virtual communities.
- > There is a wide spread of topics covered in both the consumer and business worlds – social media is becoming an increasingly important communications tool for both b2c and b2b audiences.
- > Visual and audio entertainment fares well across all platforms, as people want to share their personal favourites with other users.
- > Forums are well-established for consumer topics, which are still the most widely used area for this social medium. But other areas such as financial and healthcare are growing in importance.
- > Podcasts are also becoming more popular across a range of topics and are an important source of information for consumers and people in business alike.

Online is now seen as a trusted platform for finding, posting and discussing information in many subject areas. As a form of communication, it is as important to the early 21st Century as television in the middle of the 20th Century and the mobile phone explosion at the end of the last millennium.

With the take-up of social media now reaching significant volumes, 2009 will be a critical time for marketing and PR teams to harness the power of these important discussion networks. For more information about how this report and Social Media Library can help your campaigns achieve greater reach and impact online, call 020 7927 9010.


## *What does Social Media Library offer you?*



Social Media Library allows online PR campaigns to be executed easily and swiftly, ensuring maximum profitability. Where once it would have taken days to research a particular interest area or topic online, it now takes seconds.

Social Media Library covers a broad range of sectors including: consumer, B2B, tech, finance, fashion and healthcare to name just a few.

## *Want to know more?*

Call Social Media Library on 020 7927 9010 to find out more. Ask the team about:

 LiveAdditions™ - access to the social media you need when you need it.

 BlogScore™ and  ForumScore™ - Social Media Library's own proprietary score system that helps you engage with only the most influential social media sites.







# Social Media Library™

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