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winning in a world transformed by social technologies



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AUGUST 25, 2009

Social technology growth marches on in 2009, led by social network sites

by Josh Bernoff

We just published our third annual Social Technographics Profile in a document called "[The Broad Reach of Social Technologies](#)". The author is Sean Corcoran, with help from our data expert Cynthia Pflaum. The data across North America, Europe, and Asia will be available later today. [is now available.](#)

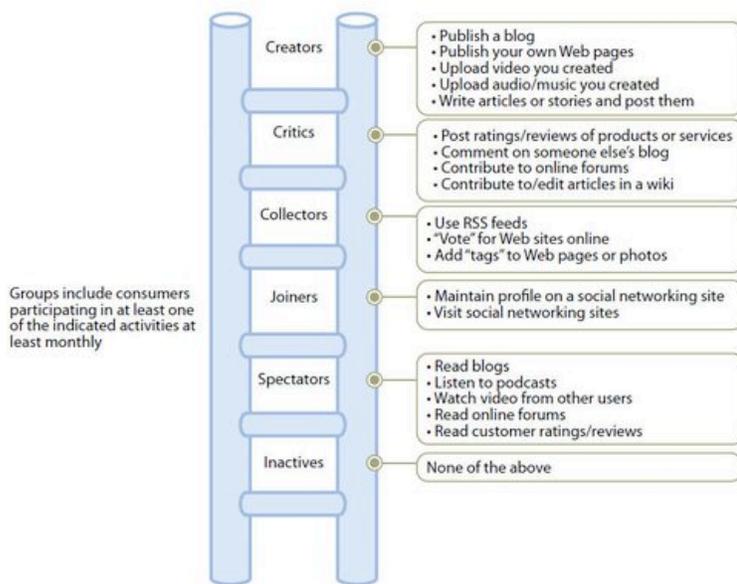
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Figure 1 The Social Technographics Ladder



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Source: Forrester Research, Inc.

Starting with the book "Groundswell" and continuing now for three years running, we've analyzed consumers' participation in social technologies around the world with a tool called the "Social Technographics Profile." The profile puts online people into overlapping groups based on their participation (at least once a month) in the behaviors shown in the ladder. We've kept the ladder categories consistent to allow us to make comparisons year-to-year, across ages and genders, and across geographies. This provides something that's often sorely lacking in analysis of online social phenomena: *perspective*.

The headline: in 2009, more than four out of five online Americans are

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active in either creating, participating in, or reading some form of social content at least once a month. In a bit more detail:

- **In the US, social technology Creators and Collectors grew slowly, and Critics didn't grow at all.** Creator activity appeals only to those who like to create or upload content, and regardless of the ease of blogging and YouTube uploading, this doesn't apply to everybody. If you believe in the future that everybody will be creating or organizing content, we disagree -- it's a matter of temperament, not technology. As for Critics, those who react to content, this group hasn't grown at all. Looking deeper into the data, this is a result of a small but actual *decrease* in the number of people contributing to discussion forums. Why? Probably because much of this activity has been sucked into social network sites like Facebook.
- **At the same time, Joiner activity exploded and Spectators became nearly universal.** The explosion in Joiners from 35% to 51% of online Americans reflects the appeal of Facebook, as both press coverage and invitations from friends suck more of us into social networks. Meanwhile, Spectators -- those consuming social content -- reached all the way to 73% of online Americans, which should end any remaining skepticism about whether this social thing is real. Soon, with the level of social content being put out there, it will be virtually impossible for an online consumer *not* to be a Spectator. Marketers, if you're not doing social technology applications now, you're officially behind. We expect a wave of Web site reorgs and redesigns to include social activity.

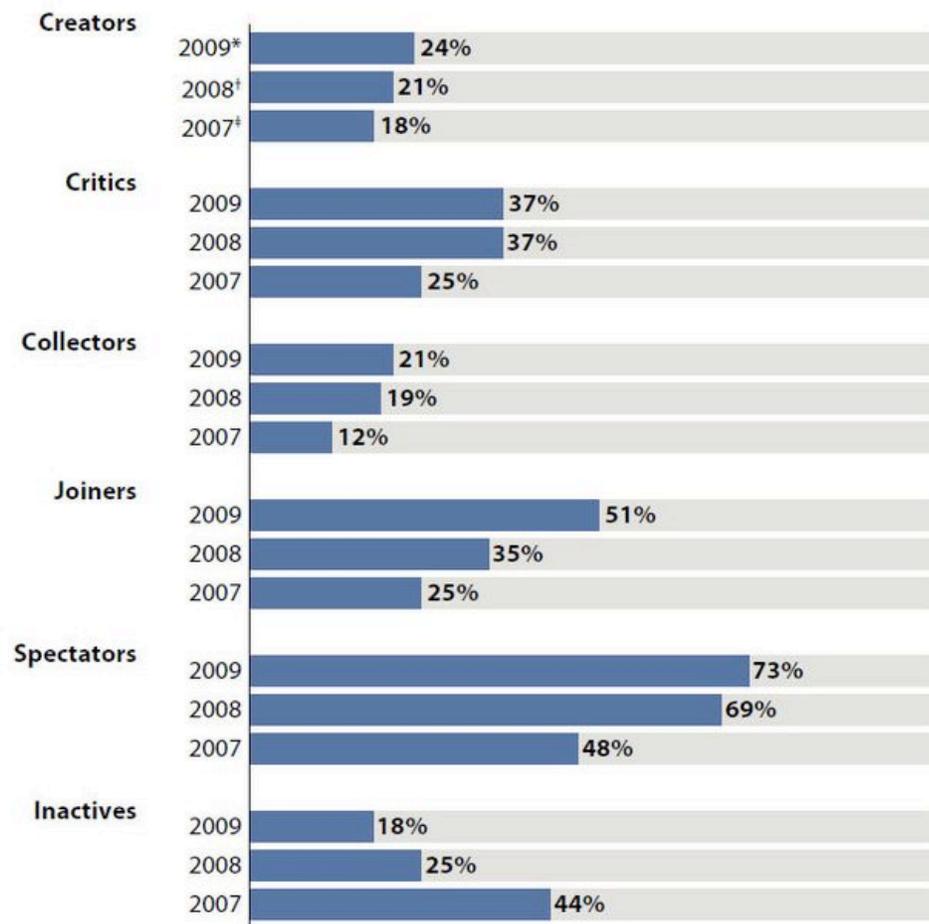
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Figure 2 More Than Four In Five US Online Adults Now Participate Socially

Base: US online adults

*Source: North American Technographics® Interactive Marketing Online Survey, Q2 2009 (US)

†Source: North American Technographics Media And Marketing Online Survey, Q2 2008

‡Source: North American Social Technographics Online Survey, Q2 2007

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Source: Forrester Research, Inc.

Looking at the data by age, we now see that participation among those under 35 is nearly universal (less than 10% Inactives) and even among those 55 and over, about two-thirds are participating. The trend is clear, soon, if you're online, you'll almost certainly be consuming social technologies.

We are now releasing international data at the same time as this US data. A few highlights: Europeans continue to adopt these technologies more slowly than in the US, with about 40% Inactives in the countries where we do surveys. The Netherlands and Sweden have the most participation, Italy has the most Creators, and social networks are most popular in the UK. For more details see the [summary of Rebecca Jennings' report](#) on social technologies in Europe.

Asian social participation is typically as high as or higher than in the US. For example South Korea, where I'm going next week, has only 9% Inactives and 48% Joiners, as a result of the popular CyWorld social network site.

The international data by country, age, and gender [is here](#). ~~will be available later today~~. You can even put the data on your own site -- we've made it embeddable. In my travels, I've found that marketers have a variety of attitudes about social technologies, ranging from "it's obvious that they're growing" to "it's a flash in the pan". The point of data like this is to provide a real, solid, objective basis for planning and discussion that goes beyond personal experience. No matter who you market to, and in what country, you need to know what your customers are doing. These surveys can help you take that first step+.

Added: Since the embeddable widget with the new data is now available, I've posted it below:

Posted by Josh Bernoff at 09:00 AM in [Data](#), [Groundswell](#), [Josh's posts](#), [Weekly data chart](#) | [Permalink](#)
[Technorati Tags](#): [Collectors](#), [Creators](#), [Critics](#), [Joiners](#), [social technographics profile](#), [Spectators](#),
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» [What are your arts patrons doing online?](#) from smArts & Culture | your arts marketing edge

Ever wonder what your patrons are doing online? Last Friday, I mentioned a new report by Forrester Research. "The Broad Reach of Social Technologies" is the firm's third annual report that paints profiles of online technology users. Revisiting the rese... [\[Read More\]](#)

Tracked on September 01, 2009 at 08:30 AM

» [Social Networks Eroding Forums?](#) from One Man and His Blog
Forrester's new Social Technographics Profile report hit the interwebs a few weeks back. (I'm catching up on my Safari tabs, can you tell?) A couple of key points in the accompanying blog post:As for Critics, those who react to content,... [\[Read More\]](#)

Tracked on September 19, 2009 at 05:38 AM

COMMENTS



Josh,

I enjoy this notion: "If you believe in the future that everybody will be creating or organizing content, we disagree -- it's a matter of temperament, not technology." That raises the issue of how we can measure and predict that particular temperament. Doing so would allow marketers to know exactly who they should be targeting when going after influentials, right?

But how can we figure that out? Are there psychographic or behavioral patterns we can find in the data? Thanks in large part to your work, I understand that demographics can go a long way in predicting levels of creator activity, but I'm interested in figuring out the differences within groups.

Is this something that you have looked into?

Posted by: [Tim Marco](#) | [August 25, 2009 at 12:31 PM](#)



Tim, there are two ways to answer your question.

One way to see if there are a lot of creators in your customer base is to do a profile of your customers. In other words, survey them and ask them. We do this all the time for clients.

The other way, which is easier, is to search the Internet for people talking about your products. You can hook up with one of the listening platform companies like Nielsen BuzzMetrics, TNS MI Cymfony, or Visible Technologies to get this information in a more professional form.

There's obviously more to in than just these few comments, but that's a start, anyway.

Posted by: [Josh Bernoff](#) | [August 25, 2009 at 02:52 PM](#)



Great fodder for the bosses who are reluctant to jump into social media.

Posted by: [David Meerman Scott](#) | [August 25, 2009 at 02:55 PM](#)



Tim:I'm 51, father of 3 children, in very high-tech career,a musician, lyricist and self-classify, according to Josh's data as inbetween spectator and critic. So, why being artistic and engaged in technologies, dont I behave as a "creator"? For me, TIME is the qualifier; my investment in socializing is with my children - they need to be raised and trained. Secondly, my opinion about all that's social matters little - and I'm Ok with that. I need face-to-face because I'm more extroverted and energize via human interaction. Thirdly, my creative output is not typically in text but with music and lyrics - and TIME becomes the common factor once again. Would I rather opionate to the world of unknowns after a hard day of work - or compose? My temperament just wont allow for social network "noise". My deep human need is for touch, support, giving, sharing - most of which becomes "virtural" on soc networks.

Posted by: [Rob Waters](#) | [August 25, 2009 at 02:59 PM](#)



International data, age and gender - will that be available for Sweden?
(Gender by age)

Posted by: [chris Jangelov](#) | [August 25, 2009 at 06:14 PM](#)



Hello Josh,

First, let me congratulate you, Sean and the rest of the Forrester team involved in the creation of this report, it's great work and very useful. Secondly, I have a question for you: why is Latin America still missing from your annual report? I'm sure you are aware that Latin America is one of the fastest-growing internet markets in the world and its people are rapidly embracing social technologies, so maybe there should be room for that region in your report. Anyway, keep up the good work!

Posted by: [Antonio Montero](#) | [August 25, 2009 at 06:21 PM](#)



To Chris: we have Swedish data cut by age or gender, but not both -- limitations of the size of our sample.

To Antonio: We're very interested in Latin America and have looked into surveys there -- it's a little challenging to get representative data, but we'd certainly be interested if we can figure out a way to do it profitably.

Posted by: [Josh Bernoff](#) | [August 25, 2009 at 08:16 PM](#)



Hello Josh,

Great collection of data and insight,
thank you and the groundswell team again for your work

Cheers

Michele

Posted by: [michele smorgon](#) | [August 26, 2009 at 12:11 AM](#)



I wonder, if you re-cut the data would it support the 90-9-1 rule?

Posted by: [Peter Kim](#) | [August 26, 2009 at 07:04 AM](#)



Peter -- there's a fundamental disconnect inherent in your question. 90-9-1 applies to a contributions to a single site. Our data applies to contributions across all sites.

See my comments on the topic: <http://blogs.forrester.com/groundswell/2008/11/reconciling-soc.html>

Posted by: [Josh Bernoff](#) | [August 26, 2009 at 08:41 AM](#)



Josh,

Is it possible that Forrester can provide social technographic profile from other Asian countries (esp. south east Asia), such as Singapore, Malaysia, Indonesia, Phillipine, and so on anytime soon?

Posted by: [Irene](#) | [August 26, 2009 at 10:42 AM](#)



Nice work; interesting data.

Love the widget. Do you have any data on South America? Major cities, particularly ones catering to international tourists, have bustling internet cafes. Cheers.

Posted by: [Mignon Erixon-Stanford](#) | [August 26, 2009 at 10:44 AM](#)



I can see overlapping groups but why is it a ladder? Is this based on tracking individuals? I appear to have skipped several rungs as there are technologies I never use (RSS) while others higher up I use daily. I would suggest people choose what they do based on need rather than some progression of skills, usage or attitude.

Posted by: [David Slight](#) | [August 26, 2009 at 11:26 AM](#)



Really love The Social Technographics Ladder. Great tool for myself to remember and to explain to staff and customers. Best blog entry I have read in the last weeks.

Claus
COO VerticPortals

Posted by: [Claus@VerticPortals](#) | [August 26, 2009 at 01:01 PM](#)



Thanks for the info Josh,

At my opinion, the percentage of inactive decrease is linked to the increase of social media offer. The market is growing and now the majority of websites includes social features or content. Inactives are becoming Spectator "naturally", it is not a behavioral evolution. Moreover, unaware users could watch, read, listen to a social media content without knowing it is actually one. So, I wonder if Inactives and Spectators could be merged together?

Posted by: [Jean-Sebastien](#) | [August 26, 2009 at 01:58 PM](#)



Josh - Thanks to you and the Forrester team for providing much-needed context on social media growth trends with the "Ladder." One of the more insightful reports/tools I've seen in quite awhile.

I feel inundated with quantitative assessments of the growth in social media. So, it is refreshing to see focus on the qualitative side of things.

Look forward to using this tool with our team and our clients.

D.J.
Managing Director
WebDriven LLC

Posted by: [D.J. Smith](#) | [August 26, 2009 at 02:14 PM](#)



Interesting article. Really appreciate the charts and stats. Breaks it down nicely.

Posted by: [Cheryl Finrock](#) | [August 27, 2009 at 08:08 PM](#)



Josh,
What happened to Forrester's data for Canada? You had Canadian data in 2008. But there's no Canadian data yet for 2009.

Posted by: [Joseph Thornley](#) | [August 30, 2009 at 05:16 PM](#)



Josh - appreciate the mention of Visible Technologies in your response to Tim. This report is one my favorites that Forrester produces each year. I was anticipating a larger percentage change in creators this year but looks like 3% uptick is the theme there over past 3 years. Thanks for producing this.

@bcahill
@visible_tech

Posted by: [Blake Cahill](#) | [August 31, 2009 at 03:46 PM](#)



Joseph, I'll check into that. It's an oversight, I know we have Canadian data.

Posted by: [Josh Bernoff](#) | [August 31, 2009 at 05:28 PM](#)



Update: the 2009 survey of Canadians is still in the field. As soon as we get the data back, we'll post it.

Posted by: [Josh Bernoff](#) | [August 31, 2009 at 05:46 PM](#)



Considering the rising unemployment rate, to what extent do you feel idle time impacts SM trends?

Posted by: [Toni](#) | [September 03, 2009 at 11:25 PM](#)



@Toni: we are looking for evidence that the economy is increasing people's use of social technologies including job networking.

Posted by: [Josh Bernoff](#) | [September 08, 2009 at 06:54 AM](#)



Is there anyway, you can re-share the 2008 data while retrieving the 2009 from the field? Kind of desperate here.

Thanks!

Posted by: [Eric](#) | [September 15, 2009 at 01:28 PM](#)



Josh,

Great article.

One question - how do you collect a representative sample? Online research would bias the sample toward participation, but I would think phone research would bias the sample away from online participation. Maybe this is panel-based, using paper and pen? But that obviously presents a whole other set of biases.

Regards,
Jenny

Posted by: [Jenny](#) | [November 11, 2009 at 10:43 PM](#)



Hi Josh,

I noticed you wrote at the end of August it'd be updated with Canadian info, but still can't see any?

Thanks,

Danny.

Posted by: [Danny Brown](#) | [November 18, 2009 at 12:52 PM](#)



Canadian data coming early December.

Posted by: [Josh Bernoff](#) | [November 19, 2009 at 10:56 AM](#)

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