

A photograph of a group of people sitting on a dark leather couch in a bright room with large windows. An older woman with short brown hair, wearing a light-colored sweater and white pants, is holding a black tablet and looking at it. A man with dark hair is sitting next to her, also looking at the tablet. Other people are visible in the background, some looking at the tablet. The scene is overlaid with a semi-transparent green box containing text.

National Social Media Survey 2014

The largest trend analysis on the use and expectations of Social Media in
the Netherlands #NSMO

Conducted by:

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The largest trend analysis in the Netherlands



Newcom initiated the National Social Media Survey in 2010.

This large-scale national survey has been conducted for the fifth time in a row in 2014, with an impressive response rate (n=15.179).



You
Tube

In January 2014, Newcom invited a sample of Dutch people (ages 15 and up) to participate in the great Social Media Survey. People were able to participate through an online questionnaire.



Age	Number of respondents
Between ages 15 and 19	1.116
Between ages 20 and 39	4.673
Between ages 40 and 64	6.502
Between ages 65 and 79	2.170
80 years old or older	717
<i>Total</i>	<i>15.179</i>

Findings and expectations

2013

Social Media are *integrated* into everyday life

Facebook and Twitter are the largest

The amount of *Facebook-users* has stabilized

Tweeters are active users

The hype sensation is gone

People are *worried about privacy*

2014

Fragmentation?

Are *youngsters* turning their backs on

Facebook?

Is *Twitter* trending or collapsing?

Is *Google+* gaining ground?

Are *new Social Media* on the rise?

Are *privacy concerns* at issue?

A close-up photograph of a hand holding a white pipette tip. The background is a soft, out-of-focus blue. A semi-transparent green rectangular box with a fine grid pattern is overlaid on the right side of the image, containing the word "Results" in white text.

Results

What to expect in the results section

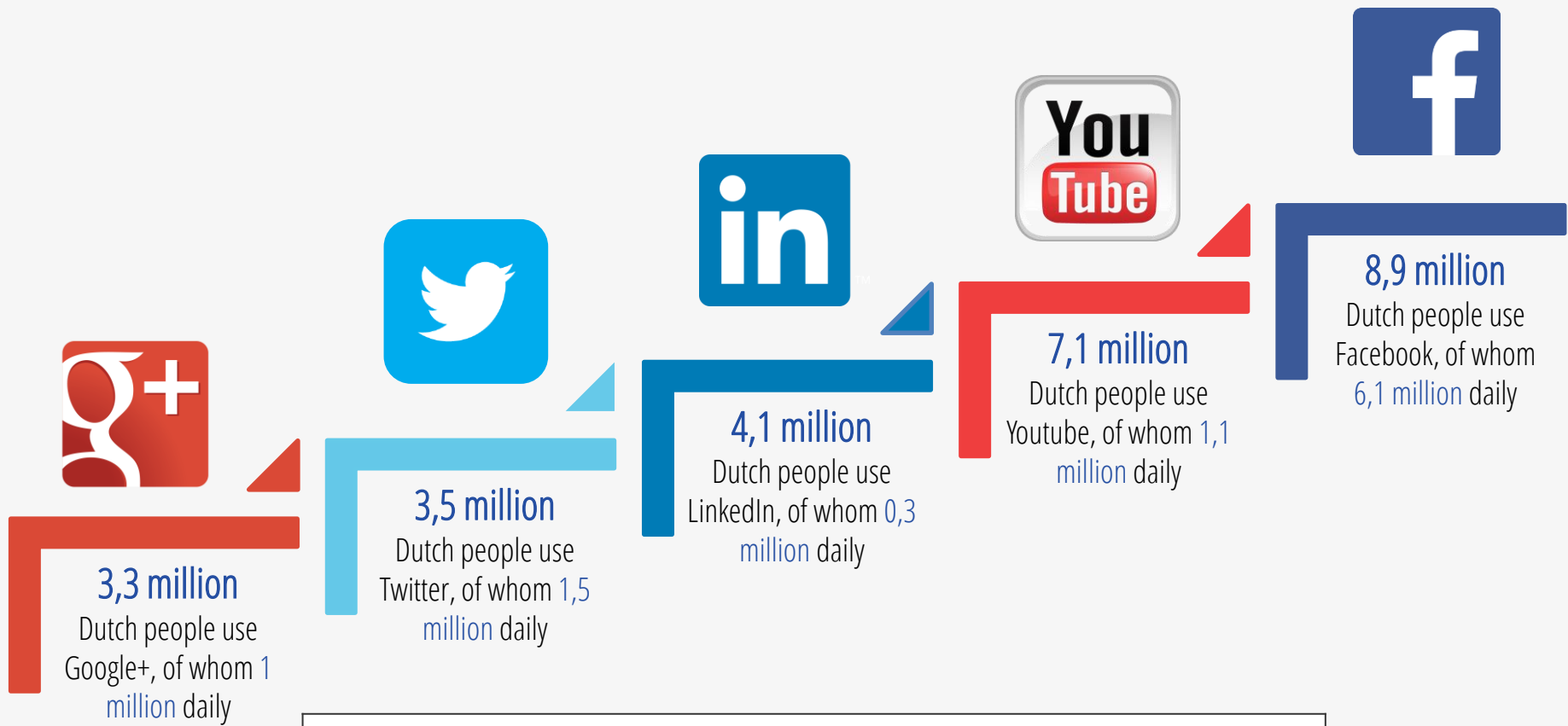
- The use of Social Media platforms
- Image of Social Media
- Profiles of Social Media users



The use of Social Media platforms

**“ Facebook and YouTube most used platforms
in the year 2014 ”**






Facebook and YouTube most used platforms in the year 2014



The absolute numbers are a projection of the results based on the following data:

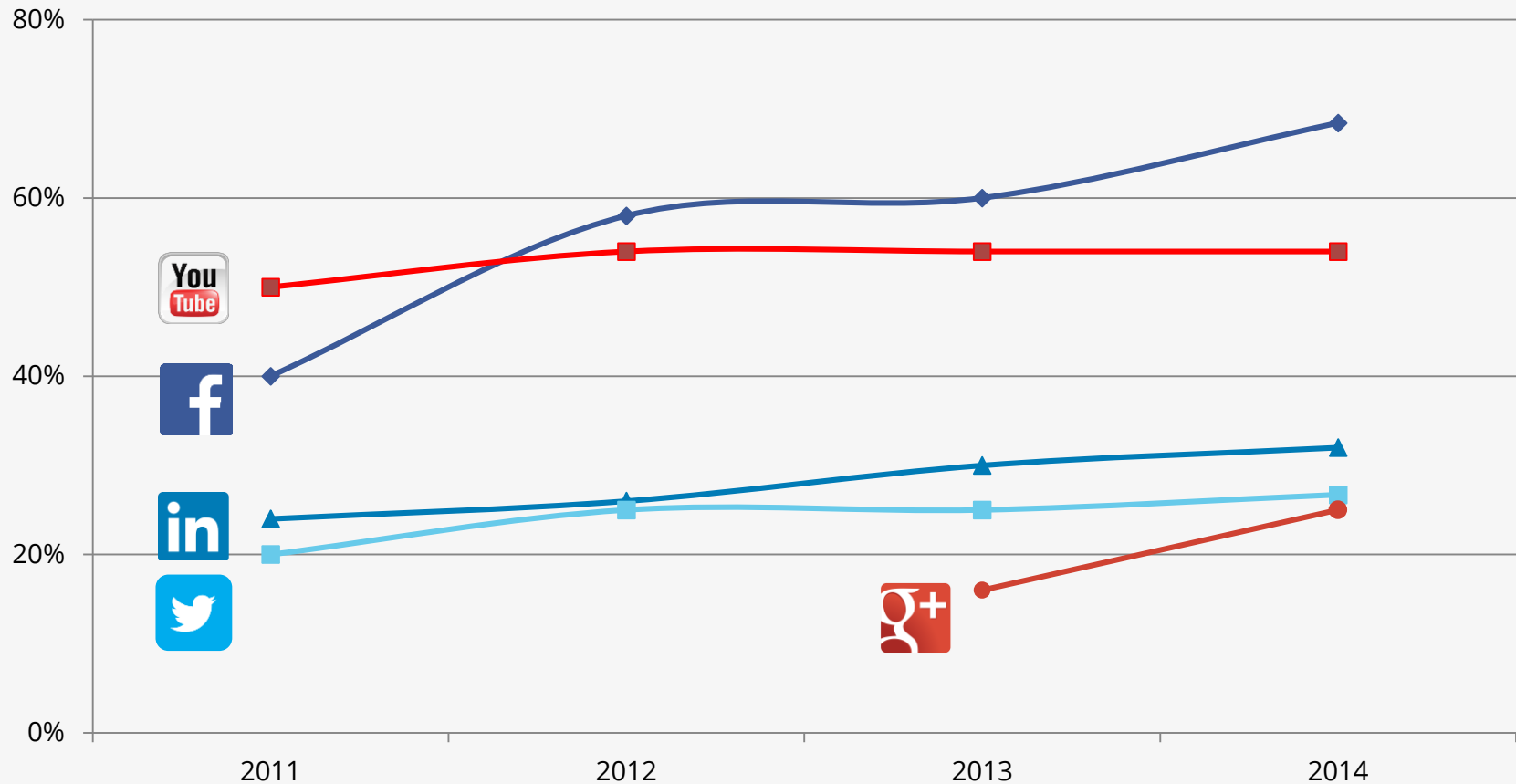
Number of Dutch people	Target population Dutch people 15+	Internetpenetration	Population
16.779.575	0,83	0,94	13.067.554

Google+ is relatively going through the largest increase in users

		2013	2014	% change in 2014 in relation to 2013
	Usage	7,9 million	8,9 million	+13%
	<i>Daily usage</i>	<i>5,0 million</i>	<i>6,1 million</i>	<i>+22%</i>
	Usage	7,1 million	7,1 million	0%
	<i>Daily usage</i>	<i>0,9 million</i>	<i>1,1 million</i>	<i>+22%</i>
	Usage	3,9 million	4,1 million	+5%
	<i>Daily usage</i>	<i>0,4 million</i>	<i>0,3 million</i>	<i>-25%</i>
	Usage	3,3 million	3,5 million	+6%
	<i>Daily usage</i>	<i>1,6 million</i>	<i>1,5 million</i>	<i>-6%</i>
	Usage	2,0 million	3,3 million	+65%
	<i>Daily usage</i>	<i>0,5 million</i>	<i>1 million</i>	<i>+100%</i>

Usage Facebook and Google+ has increased

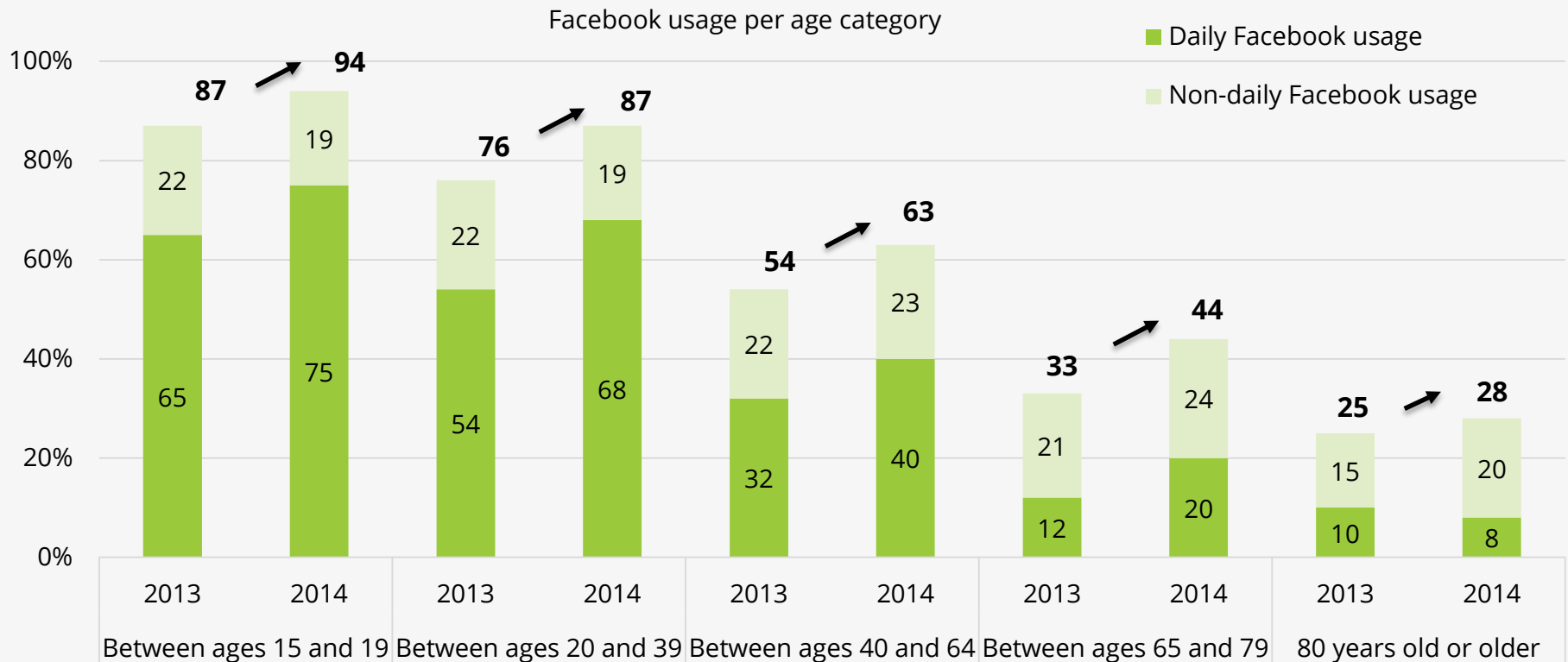
Do you use the Social Media listed below?



N.b. The presented percentages refer to the total sample population.

Facebook is gaining ground

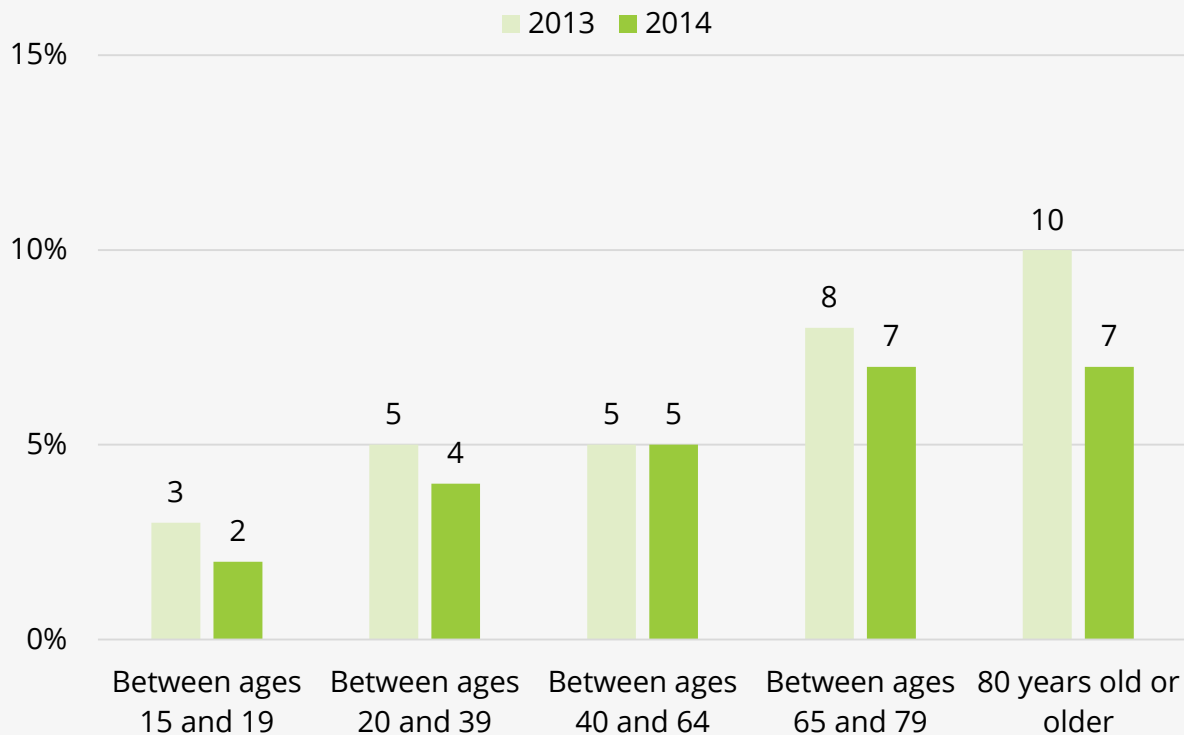
The importance of Facebook has increased. 6 out of 10 sees Facebook as the most important platform (59%). This is an increase compared to 2013, even though Facebook was already considered important back then (50%).



N.b. The presented percentages refer to all Dutch people within the corresponding age category.

The number of Facebook quitters has declined

Facebook quitters in corresponding age category



quitters

Merely 5% of the Dutch have quit Facebook.

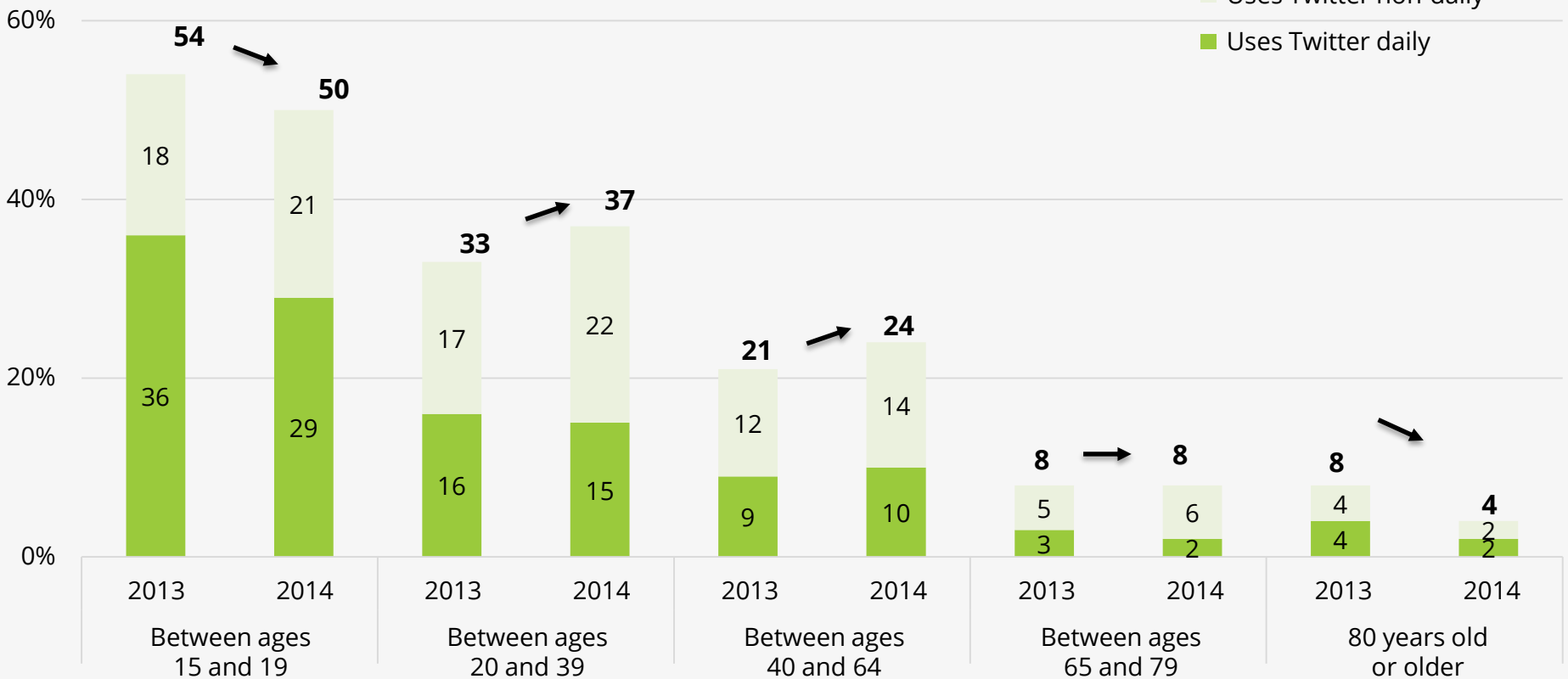
The most important reasons to quit Facebook are:

1. I do not feel connected to a lot of the people that use Facebook (48%);
2. It is too time consuming (41%);
3. I do not trust Social Media platforms (34%).

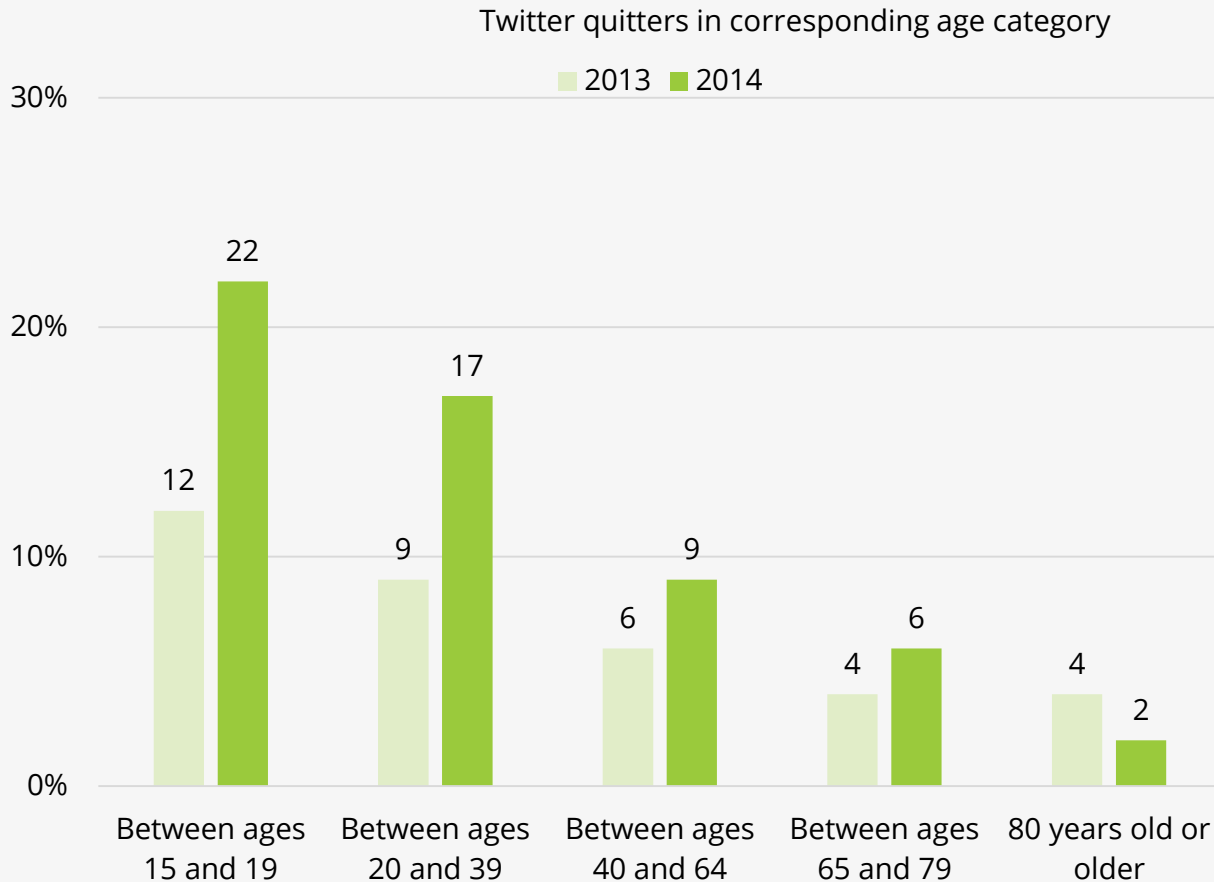
Twitter usage amongst youngsters is reducing

Twitter usage per age category

■ Uses Twitter non-daily
■ Uses Twitter daily



More Twitter quitters especially amongst youngsters



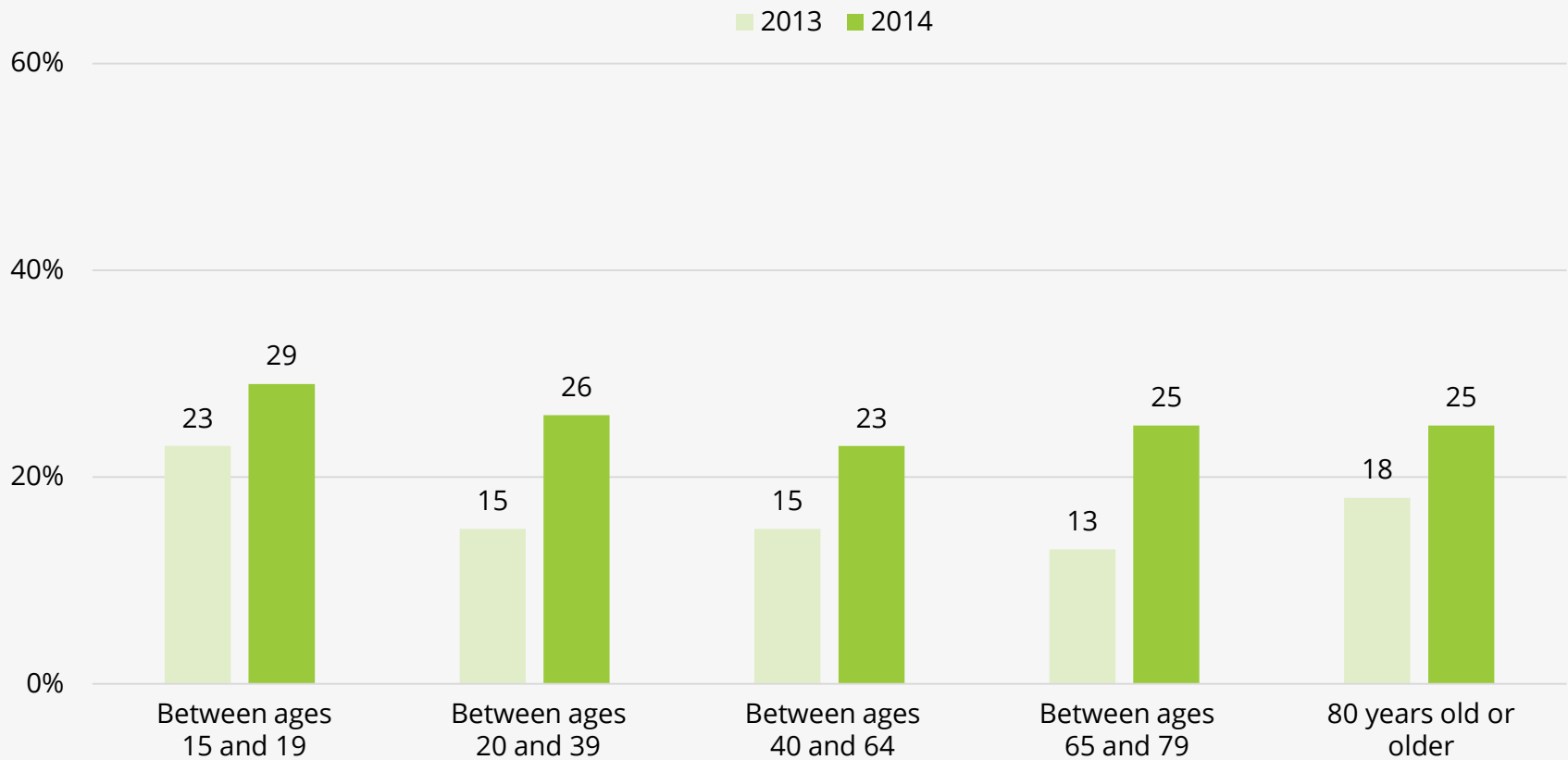
11% of the Dutch have quit Twitter.

Most important reasons to quit Twitter are:

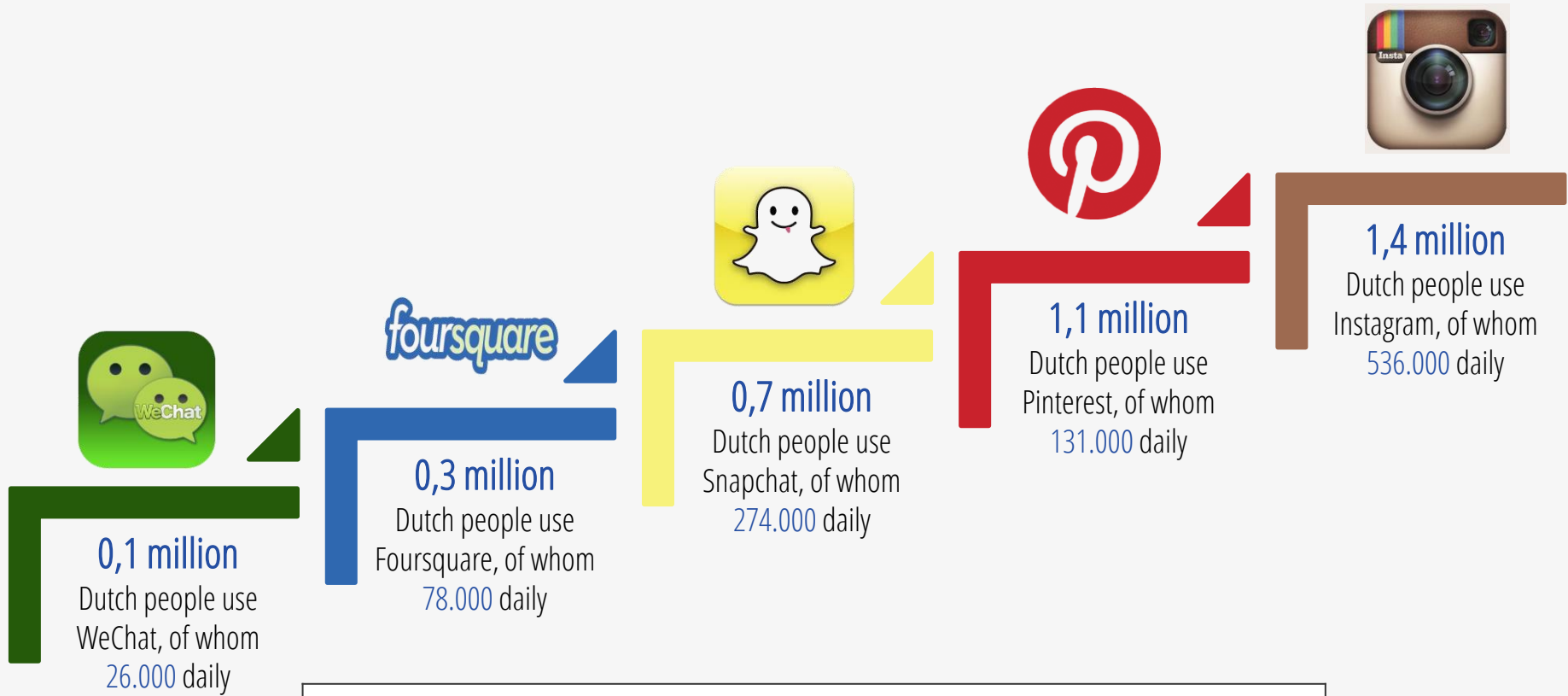
1. It yields too little results (36%);
2. It is too time consuming (32%);
3. I do not feel like I belong (anymore) (27%).

Google+ is experiencing an explosive increase

Google+ usage






New platforms are on the rise in 2014



The absolute numbers are a projection of the results based on the following data:

Number of Dutch people	Target population Dutch people 15+	Internetpenetration	Population
16.779.575	0,83	0,94	13.067.554

Usage new platforms increased considerably

		2013	2014	% change in 2014 in relation to 2013
	Usage	0,7 million	1,4 million	+100%
	Daily usage	120.000	536.000	+347%
	Usage	0,5 million	1,1 million	+120%
	Daily usage	56.000	131.000	+134%
	Usage	0,2 million	0,3 million	+50%
	Daily usage	52.000	78.000	+50%

N.b. In 2013 (daily) usage of Snapchat and Wechat were not measured.

4 out of 10 people who considered Twitter to be most important in 2013, now consider Facebook to be most important

What platform is **currently** most important to you?

		Facebook	LinkedIn	YouTube	Twitter	Google+	New Media	None of the above
What platform was most important to you last year?	Facebook	90%	2%	2%	2%	1%	2%	1%
	LinkedIn	15%	72%	2%	6%	1%	1%	3%
	YouTube	24%	2%	65%	2%	2%	2%	3%
	Twitter	44%	3%	4%	42%	1%	6%	1%
	Google+	10%	0%	2%	0%	85%	1%	1%
	New Media	33%	2%	8%	2%	4%	46%	6%
	None of the above	37%	4%	4%	3%	4%	1%	47%

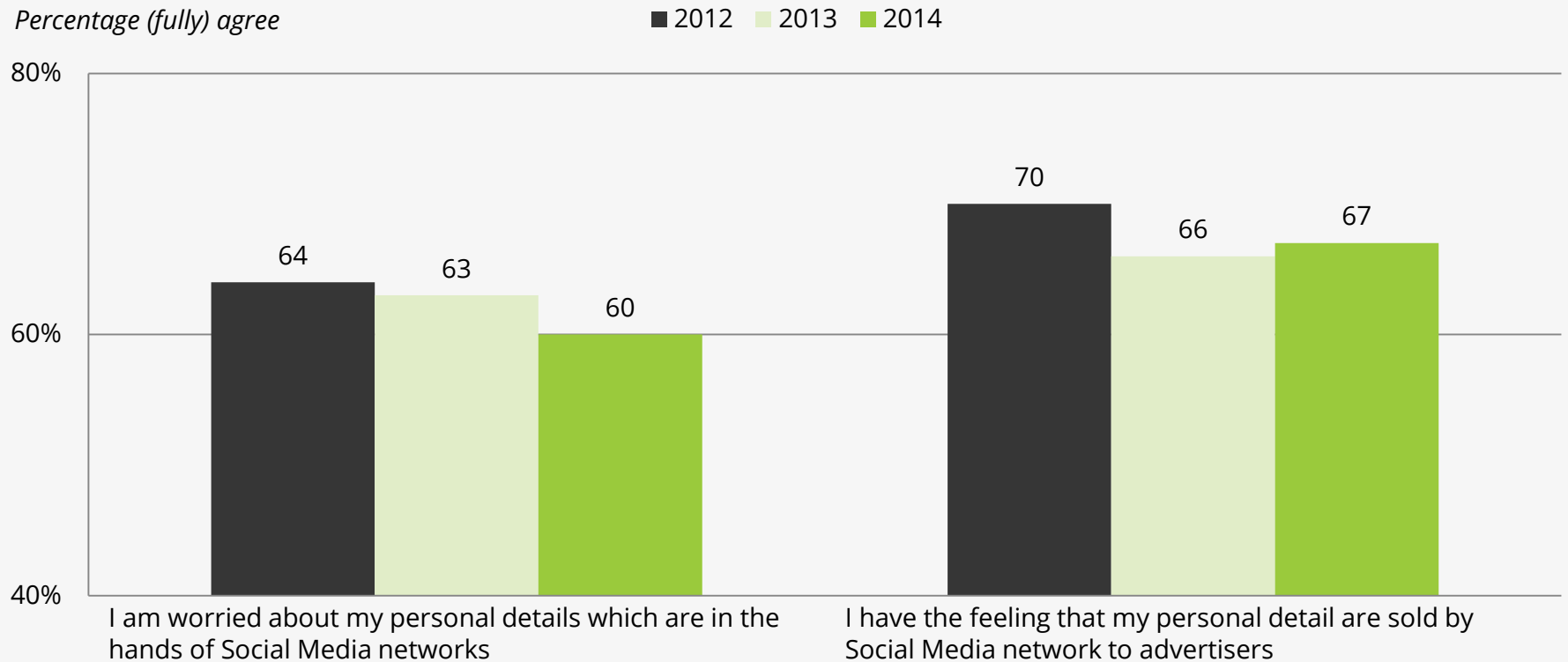
Explanatory notes for table: Percentages should be read horizontally. For example, in the fourth row of the table you will be able to read that 42% of the people who considered Twitter to be most important last year, still think Twitter is most important. The remaining percentages in that row indicate people who considered Twitter to be most important last year, but consider other platforms to be more important this year. For example, 44% of the people (4 out of 10) who considered Twitter to be most important last year, now consider Facebook to be most important.

Imaging Social Media

“Despite the integration of Social Media there are still concerns and trust issues”

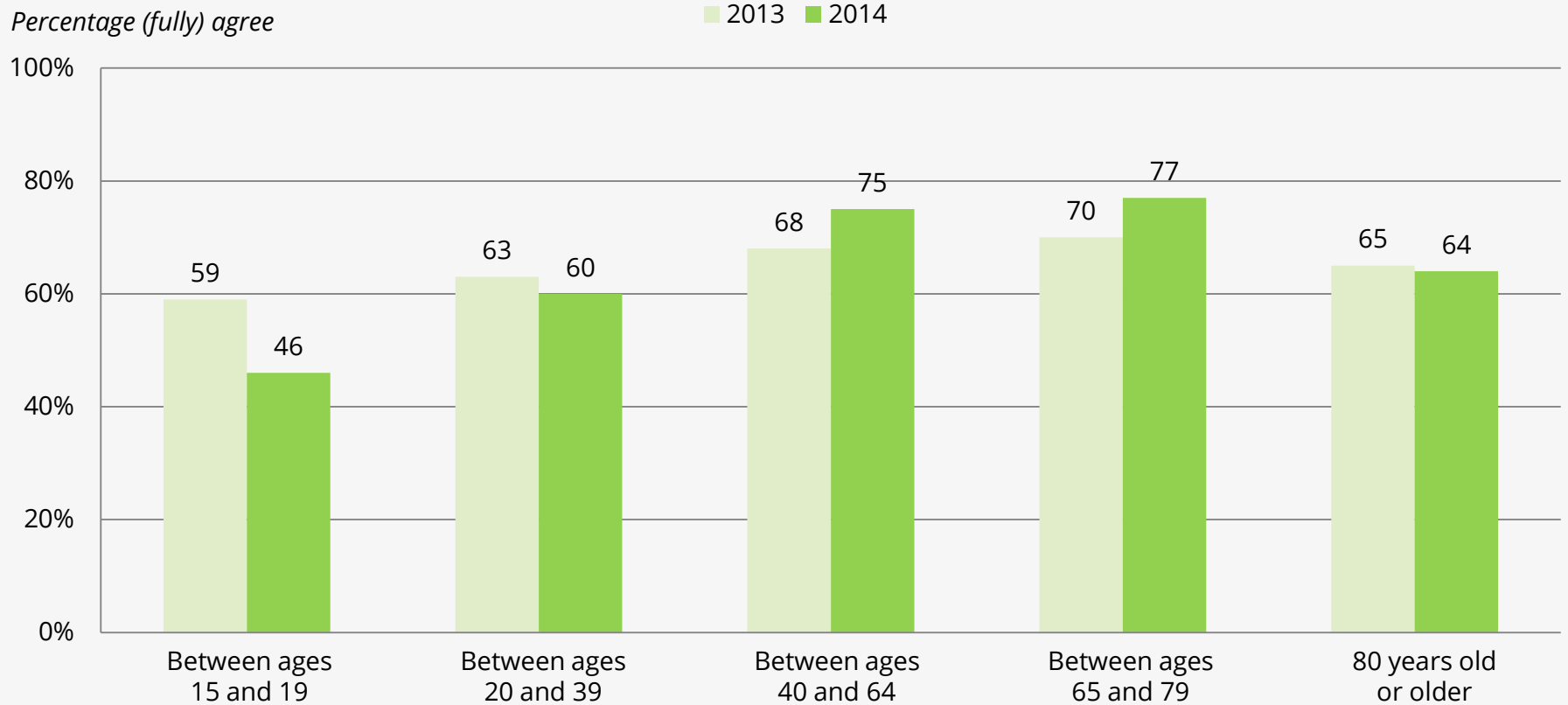
6 out of 10 Dutch people are still concerned about privacy

To what extent do you agree or disagree with the following statements?



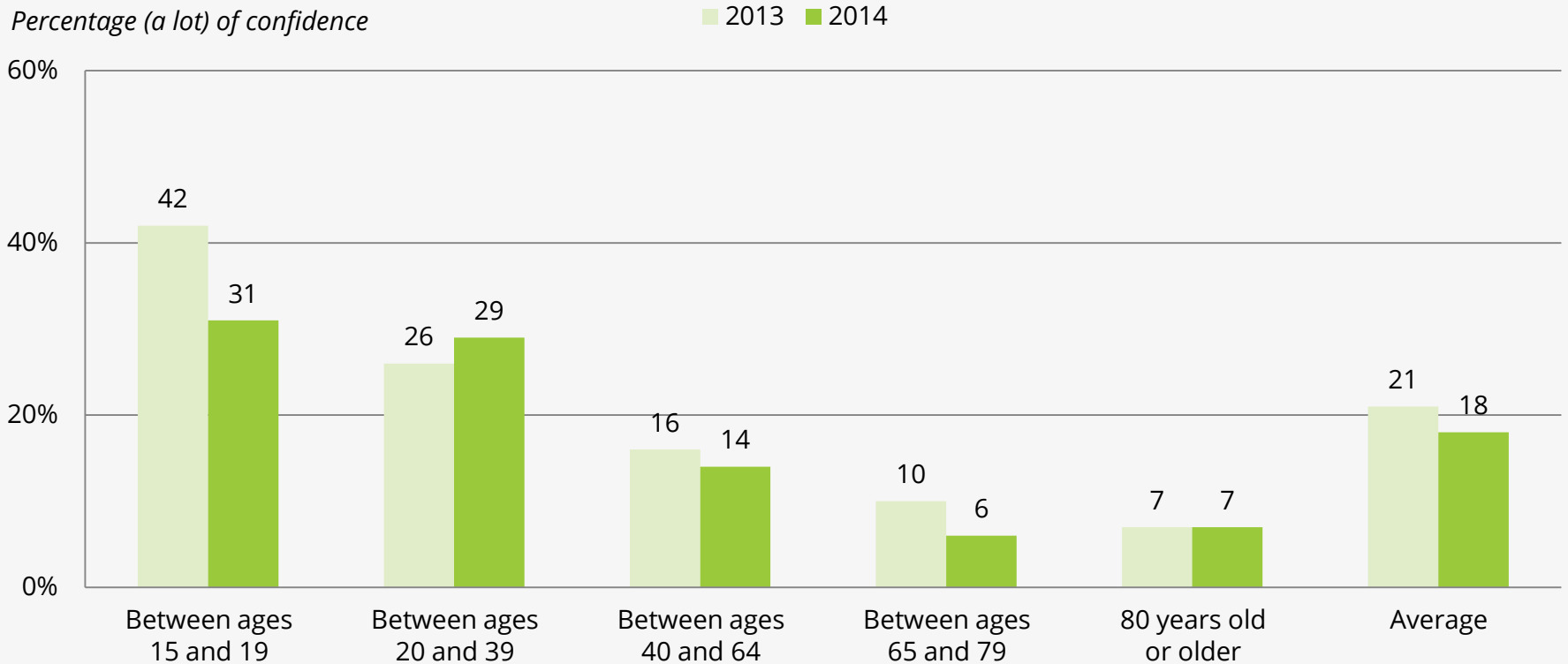
Amongst people aged over 40 concerns about selling personal details have increased

To what extent do you agree or disagree with the following statement: "I have the feeling that Social Media networks sell my personal detail to advertisers"

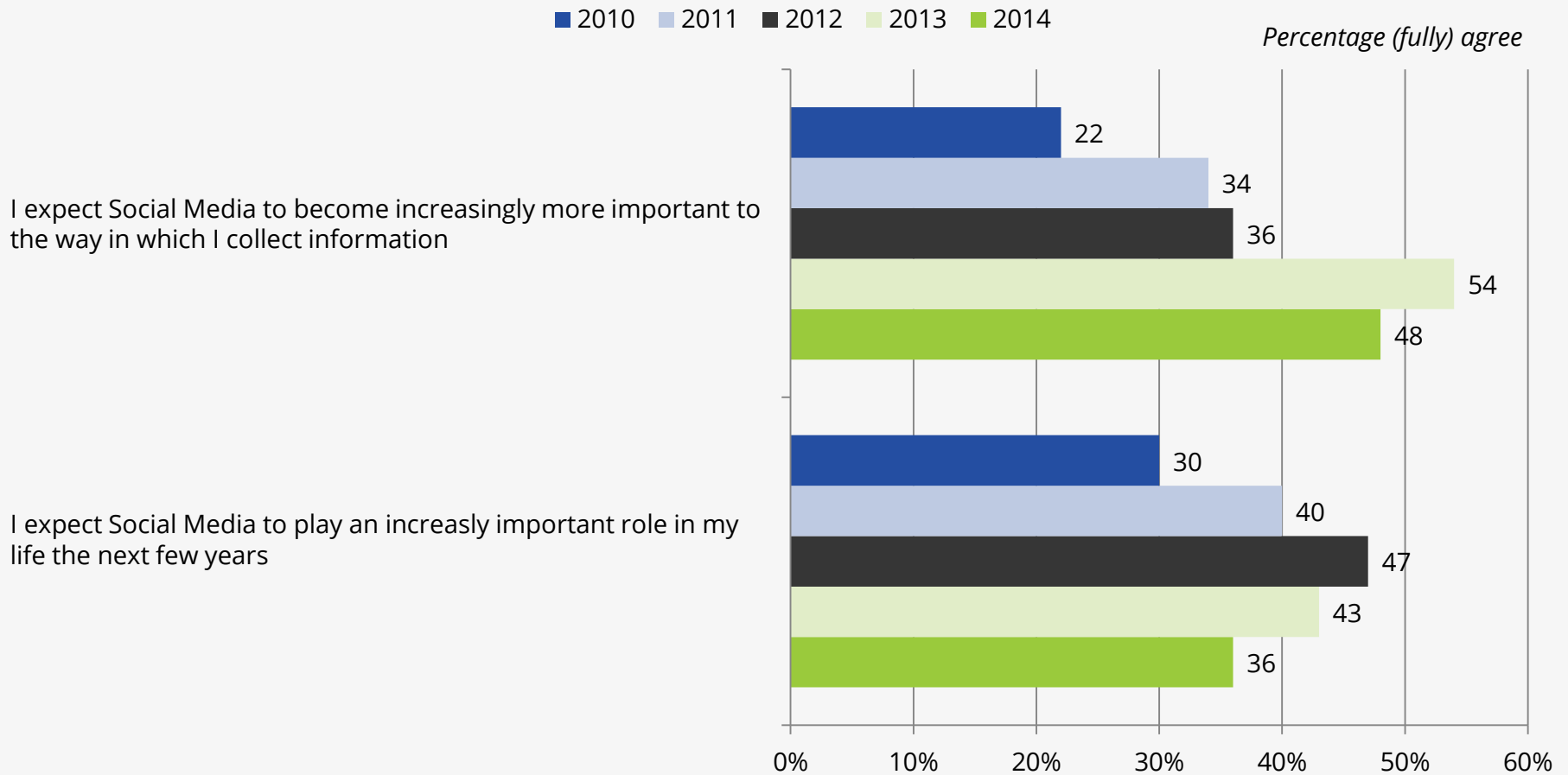


Trust in Social Media is declining amongst youngsters

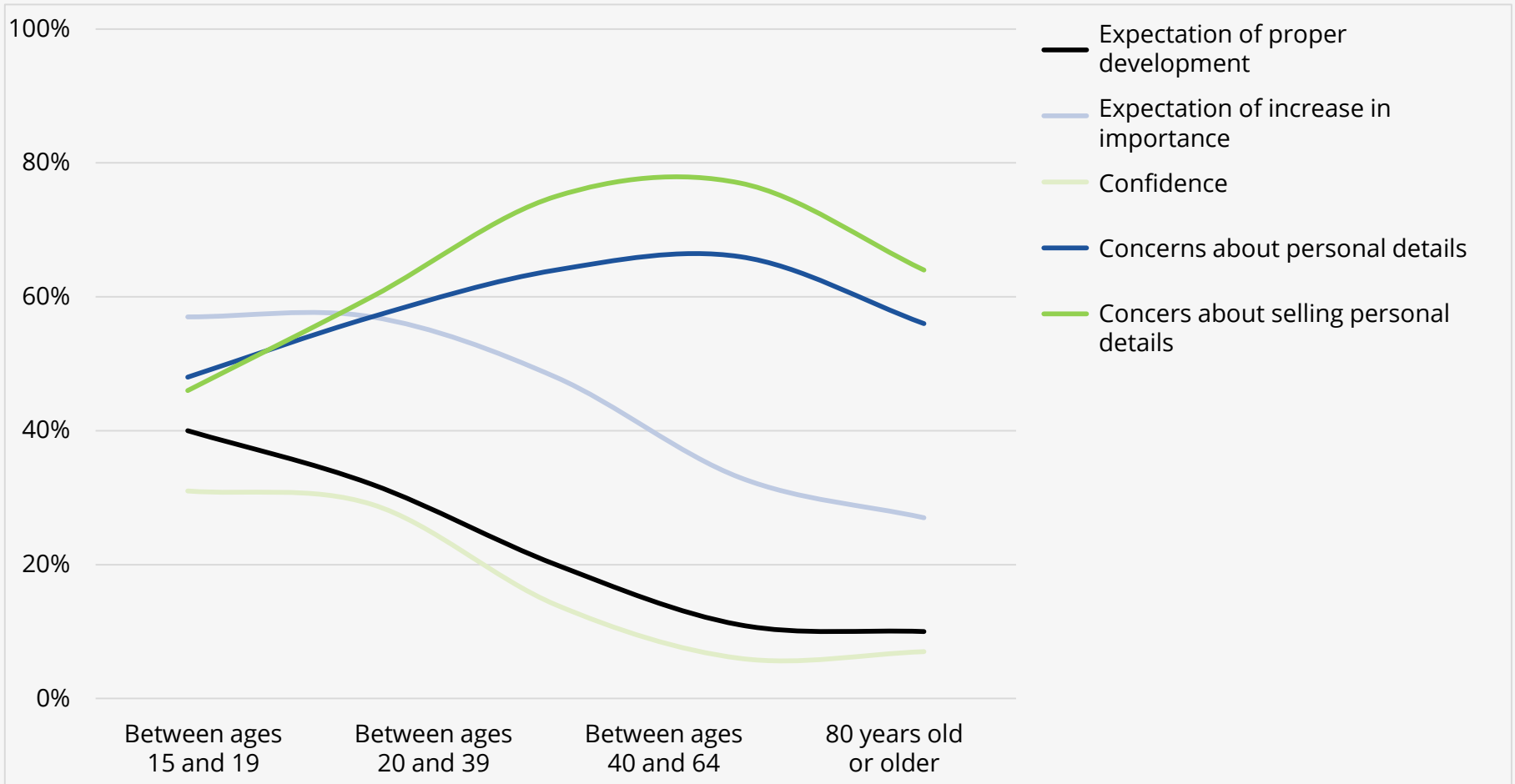
To what extent do you have confidence in Social Media?



People expect that gathering of information through Social Media will become less important

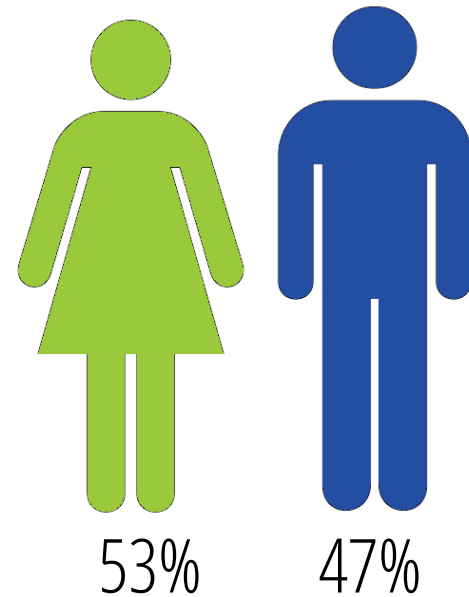


Youngsters are less worried and have more confidence



“Social Media is embedded in all layers of society”

Almost 9 out of 10 Dutch people use Social Media



Age category	Age distribution Social Media usage	Penetration Social Media usage	Average number of Social Media platforms amongst users
15 – 19 y/o	8%	99%	4
20 – 39 y/o	35%	97%	3
40 – 64 y/o	42%	84%	2
65 – 79 y/o	11%	68%	1
80+	3%	63%	1

Social Media Landscape Model[©]

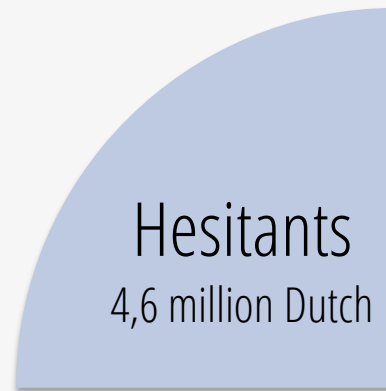


This segmentation is based on attitude and usage. The 4 attitude segments are based on clusteranalysis. These are compared to the usage (number of platforms).

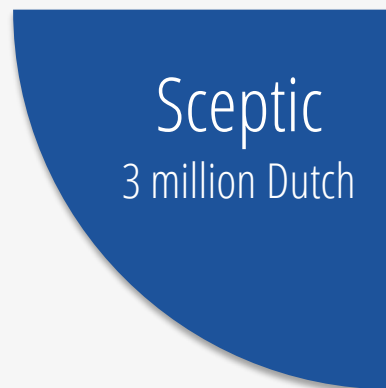
3,5 million Dutch are 'convinced' users

Social Media Landscape Model[©]

- Limited use of Social Media
- Neutral attitude towards Social Media
- Hesitant about future role



- Limited or no use of Social Media
- Social Media is a distant concept
- No confidence whatsoever



Convinced
3,5 million Dutch



- Active on several platforms
- Relatively confident
- A part of life

Dedicated
2 million Dutch



- More than average use of Social Media
- Confident in increasing role Social Media
- Open to new developments

Who are hesitant and who are sceptics?



HESITANTS

Comprises nearly a third of the quitters

Covers 30 percent of the 15-19 year olds

Half uses 1 or 2 platforms

4 out of 10 thinks Social Media will not play a bigger role in their future lives



SCEPTICS



Comprises two thirds of the quitters, 4 out of 10 does not use Social Media

Includes 40 percent of all people aged over 65

Three quarters does not have confidence, nearly 4 out of 10 is *seriously* worried about the management or selling of personal details

Who are dedicated and who are convinced?



DEDICATED

Consists of 10% of the 15-19 year olds

More than half uses 2 or 3 platforms

Three quarters is neutral about confidence and all are neutral about new developments. But everyone sees an increasing role for Social Media



CONVINCED



Consists of 4 out of 10 15-19 year olds

Two thirds uses 3 or more platforms

Half has (a lot) of confidence, nearly all expect an increase in the role of Social Media



Highlights

Highlights

No fragmentation: the traditional large platforms like Facebook and YouTube remain big;

Youngsters do not turn their backs on Facebook;

Twitter usage increased, daily usage decreased;

Google+ usage increases;

New Social Media platforms gain ground;

All layers of society use Social Media, but privacy concerns are still at issue

More information? Please contact us!

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