



Media enquiries:

Yang Yi

Tel: +86 21 2310 0973

Fax: +86 21 2310 0909

Email: yi.yang@tnsglobal.com

www.tnsglobal.com

News Release

INTERNET ADDICTION SETS IN, AS BRICS COUNTRIES BENEFIT FROM ONLINE CONFIDENCE BOOST

Global report from world's largest research consultancy, TNS, shows most avid internet users are now found in countries like Brazil, Russia, India and China

Shanghai, Friday, 16th December 2011. Consumers in fast-growth markets are hungry for greater access to the internet and once they have it, find that it quickly begins to change their lives – according to the latest findings released from Digital Life, a global study by [TNS](#), a Kantar company and part of WPP [NASDAQ:WPPGY].

The findings show that as advances in infrastructure open up these markets to the wonders of the web, newcomers to the internet embrace its potential to expand their world and the opportunities available to them. When asked if the internet helped to improve their self-confidence, just 12 per cent of those online in France and Germany agreed, compared to 42 per cent of internet users in China, 52 per cent in India and 55 per cent in Vietnam. This peaks in Saudi Arabia where almost four out of five internet users (79 per cent) feel more confident online.

With this new-found confidence, people in fast-growth markets are finding their voice online – 44 per cent of the internet population in Turkey are writing their own blog every week, as are 43 per cent in China and Mexico and 39 per cent in India. The only developed market to come close in terms of sharing their views is Italy, where 40 per cent of online Italians update their blog each week, compared to 14 per cent in the US and UK.

“We have seen that the internet can become addictive; some of the most engaged are those people in markets where internet access has been limited - as soon as the infrastructure becomes available people make the most of it,” said Serene Wong, CEO of TNS Research International China (北京特恩斯市场研究咨询有限公司). She continued, *“Really understanding this emotional connection to the internet presents significant opportunity for companies who need to reach consumers in new markets to build their business.”*



The findings were revealed by TNS's Digital Life study, the most comprehensive view of how more than 72,000 consumers in 60 countries behave online and why they do what they do, which was conducted during 2011. Interactive data visualisations of the key findings can be found at www.tnsdigitallife.com.

Spending time online has a big impact for consumption of other media. As internet access has opened up, so TV viewing is starting to drop off. In China and Brazil, approximately 20 per cent more internet users will go online each day than will watch TV. Conversely, where online infrastructure is still in development, TV maintains a hold and in Egypt, Thailand and the Philippines internet users are much more likely to watch TV every day than go online***.

"We have shifted from brands interrupting consumers to needing to engage with them," says Ashok Sethi, Head of Consumer Insights, Emerging Markets for TNS. He continues, "This change in media consumption from passive TV viewing to actively searching and commenting online presents a real opportunity for brands who can truly understand this shift and develop appropriate ways to interact in this environment," commented Ashok.

Mobile broadband has been a significant catalyst in accelerating internet access in many fast growth markets. Whilst 36 per cent of people surveyed by TNS globally said they had accessed the internet via mobile in the past week, the figure was 49 per cent in China, 53 per cent in Singapore and 68 per cent in South Africa. This is particularly true in Africa, where people going online in South Africa, Nigeria and Kenya are more likely to use a mobile phone than a PC****. Chinese internet users spend 19.9 hours per week online using PC, a bit less than their Russian counterparts (21.4 hrs, the second longest among all markets); On the other hand, the Chinese internet users spend the most time (2.8hrs per week) online using mobile phone among BRIC countries (Brazil 1.0, Russia 1.5 and India 1.7).

Ashok comments, *"Introducing people to the internet for the first time in its mobile format has a huge bearing on their response and engagement with it. Their experience of the internet is imbued with all the other benefits and excitement these markets see in mobile: opportunities to develop new business models, make new connections, participate in new markets and access infrastructure like banking."*

Internet users in fast-growth markets are also amongst the most enthusiastic adopters of new products and services. While only nine per cent of the global internet population are not currently banking online and are keen to try it, the figure is 20 per cent in Chile, 24 per cent in Vietnam and a striking 62 per cent in Nigeria. Other services with the potential to do well in fast-growth markets include timeshifted TV – 18 per cent of those online in India, 11 per cent in Vietnam and as high as 55 per cent in China watch online programmes which have already been broadcast over the television, compared to the global average of 32 per cent.

"This new enthusiasm for the internet among later adopters is opening up a huge potential market to brands and businesses who can understand their needs. However, while our research unearths opportunities it also comes with a warning; consumers in more developed markets are already feeling jaded by volumes of 'digital waste' thrown at them by brands in social networks. Companies need to find a way to cut through this noise with more personalised approaches based on attitudes and behaviours of online users in different markets," concludes Ashok.



~ ENDS ~

Notes to editors

* Fast growth markets: Argentina, Brazil, Chile, China, Colombia, Egypt, Estonia, Ghana, Hungary, India, Indonesia, Kenya, Malaysia, Mexico, Morocco, Nigeria, Pakistan, Peru, Philippines, Poland, Romania, Russia, Saudi Arabia, South Africa, Tanzania, Thailand, Turkey, Uganda, Ukraine, Vietnam.

**Developed markets: Australia, Austria, Belgium, Canada, Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Ireland, Israel, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Republic of Korea, Singapore, Slovak Republic, Spain, Switzerland, Sweden, Taiwan, United Arab Emirates, United Kingdom, United States.

*** Daily media consumption (for internet users):

Egypt	(TV – 91 per cent; online for leisure – 62 per cent)
Thailand	(TV – 88 per cent; online for leisure – 64 per cent)
The Philippines	(TV – 89 per cent; online – 38 per cent)

**** Weekly internet access by device (across all internet users):

South Africa	(PC – six hours per week; phone – seven hours per week)
Nigeria	(PC – six hours per week; phone - 11 hours per week)
Kenya	(PC – five hours per week; phone – six hours per week)

TNS has made some of the key findings from this study available to the public via an interactive data visualisation that can be found at www.tnsdigitallife.com. The visualisations were developed in partnership with Digit.

Follow the conversation on Sina weibo: @tns_ri.

About Digital Life

Digital Life provides recommendations on how to use digital channels to grow your business through a precise understanding of human behaviours and attitudes online. Based on in-depth interviews with over 72,000 people in 60 countries, Digital Life's size, scale and detail make it the most comprehensive view of consumer attitudes and behaviour online, on a global and local level.

About TNS Research International China

With the merger of formerly TNS Custom and Research International, TNS Research International China is cemented as the leading custom market research agency in China. With around 500 employees and more than 200 researchers across 6 offices in China, we deliver actionable insights and research-based business advice to our clients so that they can make more effective business decisions.



We are committed to helping local leading companies win in both China and global markets and multinational companies be successful in China.

About TNS

TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and stakeholder management, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world's consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world.

TNS is part of Kantar, one of the world's largest insight, information and consultancy groups.

Please visit www.tnsglobal.com for more information.

About Kantar

Kantar is one of the world's largest insight, information and consultancy groups. By uniting the diverse talents of its 13 specialist companies, the group aims to become the pre-eminent provider of compelling and inspirational insights for the global business community. Its 28,500 employees work across 100 countries and across the whole spectrum of research and consultancy disciplines, enabling the group to offer clients business insights at each and every point of the consumer cycle. The group's services are employed by over half of the Fortune Top 500 companies.

For further information, please visit us at www.kantar.com.

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