

SOCIAL MEDIA AROUND THE WORLD



David Kok

Social media around the world

In October 2011 I published my first research on the use of social media by cities in the Netherlands. In 2012, I repeated that research and I wanted to compare my research with cities in the world. This has led to the study social media around the world (next year I will study the universe: ET tweet home! Anyone suggestions?)

Finally I found it interesting to investigate whether online inhabitants of cities want to use social media to communicate with their community.

In this paper you can find the main results of these three studies.

For more information and for networking, you can join my group on LinkedIn: Social Media Around the World.

David Kok
October 2012

Study 1: how cities in the world make use of social media

Between March 19 and June 24 I approached around 400 cities in the world. Via email and Twitter I asked them to participate in an international study on how cities in the world use social media.

Eventually the questionnaire was completed by 72 cities all over the world: one in Africa, three in Asia, four in South America, seven in Australia, 21 in North America and 33 in Europe. Three cities didn't enter their name and not all questions were completed by all respondents, so response per answer varies.

It is clear that the language barrier played an important part in the final response numbers. The study was done in English, as a result, responses from Asia and South America were few. In Africa there are only a few cities that have a local government. Through the embassies of these countries I tried to get in touch with the cities, but this has not led to concrete results.

The cities that responded are very different in size. The smallest, Huntsville, Texas, has just under 40,000 inhabitants. The largest, Athens, is a conglomerate of 5,000,000 inhabitants. On average, the cities have 900,000 inhabitants.

Which channels do cities use?

Cities make the most use of Facebook (70 cities, 97%) and Twitter (68 cities, 94.5%). Youtube is placed third and is used by 59 cities (82%). Running fourth is photo site Flickr (27 cities, 37.5%).

Foursquare and Google+ share a joint fifth place (20 cities, 27.8%). LinkedIn is in this study only in sixth place. Twelve cities (16.7%) use this channel. Pinterest is already used by 9 cities (12.5%).

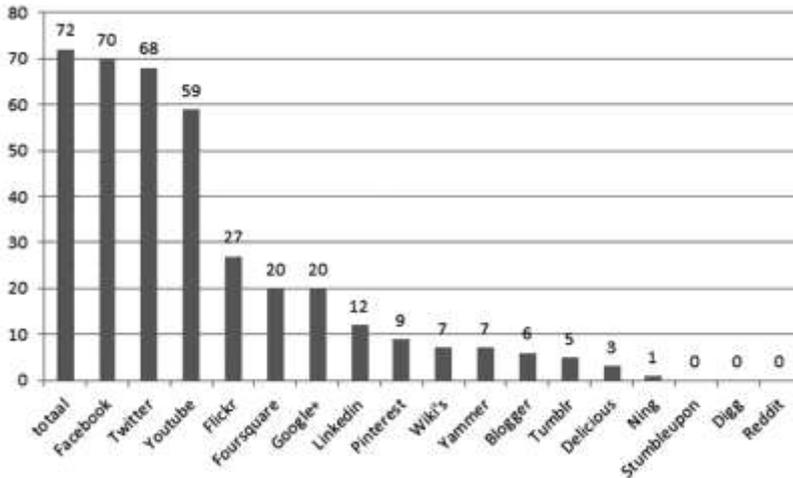


Figure 1: Number of cities that use a channel (n = 72)

To what purpose is social media being used

Cities indicate that they use social media primarily to inform citizens (94.4%) and to send information (88.9%). Social media is thus mainly used for sending information.

Remarkably, sixty cities (83.3%) say they want to connect with their citizens through social media, while a smaller number of cities indicate they use social media to listen to their citizens (n = 55, 76.4%) or respond to questions through social media (n = 56, 77.8%).

Some cities also indicate that they want to use social media as a tool in crisis situations (n = 3). Especially in the hurricane season or during earthquakes, people seem to rely on messaging via social media. One city states they use social media to respond to media coverage if it is inaccurate or misleading citizens. Finally, it is also named as a city marketing tool.

What rating are cities giving themselves

It is interesting to see that cities give themselves a high rating for their use of social media. 21 Of the cities give themselves an 8 (29.6%), six cities a 9. Because twelve cities give themselves a 6 and thirteen a 7, the average score is lower: a 6.62 (n = 71).

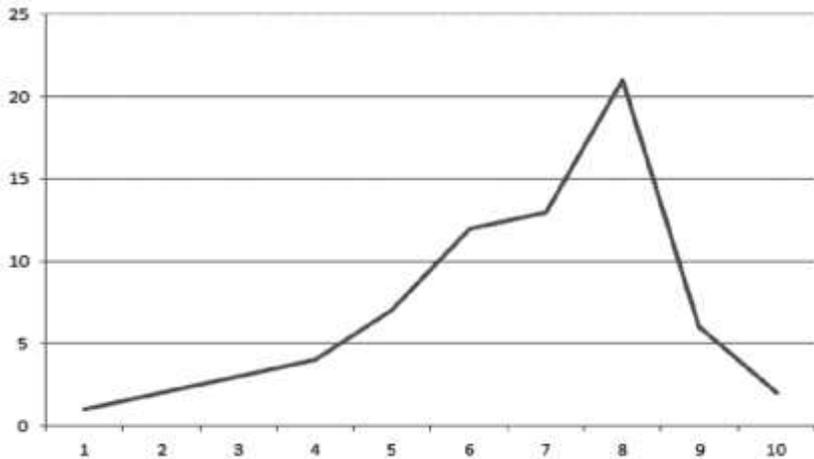


Figure 2: score that cities give themselves for the use of social media (n = 71)

Do the inhabitants use social media?

It is interesting to know whether residents in cities use social media. After all, if none of the residents use channel A, the city won't reach them if they do use channel A.

Many municipalities have no idea how many people use which channels. A total of 42 municipalities skipped that question and of the 30 municipalities that have completed the question they only scored Facebook (30) and Twitter (28).

The results can be summarized as follows:

The municipalities think that Facebook is the most used. Seven municipalities indicate that 61-70% of their population uses this channel. This is not surprising, because Facebook is the most used social media channel worldwide. Most channels scored 0-10%.

Strategy, policy, webcare

Of the respondents 38 cities (53.5%) have developed a social media strategy, while 24 cities (33.8%) are still busy with working out that strategy. Slightly less cities (32, 47.1%) indicate having a social media policy for employees. Again 24 cities indicated they are still working on it.

Forty cities said they have a webcare team to listen and respond to questions that are asked via social media (60.6%). Thirteen cities indicate that they have no webcare team and as many cities that they are setting up a webcare team.

When asked how many employees on a daily basis work directly with social media (communication, team webcare or special social media team) I received very different answers. Most cities (43%, n = 31) have 1 or 2 people who are involved with social media. 40% (n = 29) falls into the broad category of 3-10 people.

Advantages and disadvantages of the use of social media

The biggest advantage of using social media is that they allow real-time interacting with citizens (speed, n = 23, 38%). In second place is the ability to dialogue (interaction, n = 17, 28%). In third place the possibility to use social media to increase commitment to the city (n = 11, 18%). Achieving other / new target groups (n = 10, 17%) and the opportunities that social media offer to get information to the citizens (n = 9, 15%) complete the top five.

These benefits are broadly in line with the responses Dutch cities gave in the investigation into the use of social media by municipalities in the Netherlands in 2011 (Kok, 2011) have given:

1. Speed of the medium (23%)
2. Opportunities for two-way communication / interaction (14%)
3. Achieving of other / new target groups (12%)
4. (Larger) Range (10%)
5. Opportunities to follow what is happening / news / Monitoring (9%)

When we look at the drawbacks, we see that 29% of the cities (n = 16) indicate that the capacity needed to maintain social media is a disadvantage. The indiscriminate reactions, is in second place (n = 12, 22%). The fact that social media still have a limited range is in third place with 15% (n = 8). The limited ability to meet the expectations of the public (n = 7, 13%) and privacy sensitivity (n = 6, 11%) complete the top five.

The disadvantages are also in line with the disadvantages that Dutch

municipalities mention. Only the disadvantage that social media has a limited range, is not mentioned in the Netherlands.

1. Yet one more additional channel (it also takes additional capacity) (20%)
2. Difficulty to monitor / control tasks (9%)
3. Comments may be oversimplified / rumors quickly spread (image loss) (9%)
4. High expectations for rapid response (24-hour) / risk factor (8%)
5. Speed of developments (keeping up-to-date) (6%)

Network

The last question in the survey was whether cities need or want a global network for mutual learning. Three quarters of the cities (76.1%, 54) indicates are interested. This indicates that cities are aware that we have much to learn about the use of social media and that there is an opportunity to do this together.

Conclusion

Although 72 cities are not representative for all cities (and villages) in the world, we can conclude from this brief survey that the cities who participated in the study largely have the same questions as municipalities in the Netherlands. They see the same disadvantages and the same benefits.

Because we all pretty much use the same channels, it is possible to learn from each other. Ultimately Facebook and Twitter can have but a few secrets and in the end all cities have the same purpose in using social media: how can we involve inhabitants of our cities in what we do and how we can thus improve our services.

Study 2: how do cities in the Netherlands use social media

This year 221 cities (53%) completed the questionnaire (2011: 284 cities, 79%). Most cities use Twitter. The use of this platform increased by 20% to 93% compared to last year. This means that almost all respondents are active on Twitter. Not only the use of Twitter has increased: all channels, apart from Hyves (a Dutch social media channel), are used more in 2012. The use of Facebook is has even more than doubled.

Pleio (a kind of Yammer developed for the government) and Flickr are most often mentioned as other channels used.

	Linked-in	Twitter	Facebook	Hyves	Google+	YouTube	Yammer	Pinterest
2012	47%	93%	52%	10%	6%	61%	56%	5%
2011	32%	73%	20%	18%	-	36%	44%	-

Tabel 3: use of channels (2011 and 2012)

On average 3% of the total population of a city follows the city on Twitter. That means they have an average of 1,212 followers. 23 (74%) of the cities with the most followers, have 25,000 inhabitants or less. It therefore appears that small(er) cities have more followers than big(ger) cities.

To what purpose is social media being used

Social media channels are still most often used to inform citizens (sending): 186 cities (84%) indicate that they use social media for this purpose. Using social media as a crisis communication tool is also frequently mentioned (71%), followed by the option to know what is going on (65%).

Social media channels are least used to actively respond to the media. 135 cities (61%) say that they don't use their channels for this purpose. As mentioned in second place is interaction with inhabitants 43%. On the other hand, 33% of the cities say that they do use these channels for this.

In 2011 44% of the cities specified social media only as an additional communication tool. 18% used it for e-participation and as a crisis

communication tool. The latter rate is now 70%! 9% used it to respond to the press. In 2012 that's 19%.

Rating for the use social media

On average cities give themselves a 5.70 for their use of social media (scale 1/10). Most municipalities gave themselves a 6 (n = 69, 31%).

Last year the average score was 3.67. 160 municipalities (65%) gave themselves a 1 (I have an account but I do nothing with it) on one of the channels.

Do the inhabitants use social media?

This was the same question as in the first study: I asked the cities which percentage of their inhabitants made use of the different channels.

Half of the population in the Netherlands uses Facebook. Youtube is in second place with 42%. Twitter (31%) has overtaken the usage of Hyves (30%). Google+ and Pinterest are hardly used.

A third of the cities (n = 71, 32%) weren't able to give numbers in this question. Therefore I ask myself which of the municipalities that did answer did so based on estimates, and which actually measured percentages.

Policy and strategy

33% of the municipalities (n = 72) has no strategic policy for the use of social media. Half of the municipalities (n = 110) are busy developing this policy. In 2011 43% had not yet developed a policy. Half of the municipalities (49%) have policies for employees. Over two-thirds of them in the form of guidelines. In 2011 this was only 23%.

76% of the municipalities indicates they use social media more than last year (n = 168). 22% (n = 49) indicates that this has remained about the same. Four municipalities (2%) indicates to do less with social media. 93% of the municipalities indicate that they intend to make more use of social media in 2013. Last year this figure was 86%.

A third of the municipalities (33%, n = 74) indicate that they have an active webcare team. 40% indicate that they are working on assembling a team.

Conclusion

Compared to 2011 cities in the Netherlands use more social media and more channels. The percentage of population that follows a municipality remains behind in most municipalities. This is probably because municipalities (still) mainly transmit information and have little interaction.

Most municipalities have a policy, but most municipalities have no target analysis (which channels are my citizens using and how am I going to connect with them).

Study 3: is the online citizen waiting for the online city

Response

On May 13 2012, I started this survey by sending messages via email, Facebook, Twitter and LinkedIn. In the weeks and months after, I posted several reminders on the same channels, including in various LinkedIn Groups.

On August 1, the questionnaire was taken offline. At that point i had received a response of from 705 participants. Although no 1.000 (the original purpose), 705 is a representative number for the Netherlands. In terms of age, the respondents are evenly distributed in the different age groups. The youngest participant was 18 and the oldest participant was 84.

In total, the respondents came from 205 different cities in the Netherlands. Seven came from Belgium and England. Amsterdam was purveyor with 117 respondents, followed by The Hague (27) and Haarlem (20). Because of the large amount of respondents, the response is well distributed over the Netherlands.

Accountability research method

In this study I wanted to see if people who are active on social media channels, wanted to communicate with their local government through these channels and, if so, with which purpose. Therefore people who are not active in social media are not interesting for this study.

There were no questions in the survey about traditional media. There are plenty of studies that indicate that citizens still mainly want to communicate through traditional media with their municipality. I do not refute these studies. This research focuses on the question whether social media channels are so well established that they must be seen as additional channels. Channels that can and / or should be used by municipalities to communicate with the citizens who want to use them.

Finally, I wanted to keep the survey short. Just to get a higher response

rate. So it's is not a thorough investigation in which I took a broad look at the motives of people. That was not the intention.

Active on social media

Of the respondents, 97% are active on social media. Only 18 respondents (3%) reported not using social media. In the group 18-29 0% wasn't active. On average, the respondents, regardless of age, use three different social media channels.

Three quarters of the respondents are active on Facebook and LinkedIn. It is striking that 97% of young people (18-29) is active on Facebook, compared with 66% of the people in their fifties. While on LinkedIn the groups 30-39 and 40-49 are represented best, both at 84%.

Twitter users follow with a percentage of 73%. Google+ (20%), Pinterest (10%) and Hyves (7%) complete the list. Of the respondents 54 (8%) indicated that they used a different channel. Youtube (11), Foursquare and Yammer (both 7) were the most frequently mentioned here.

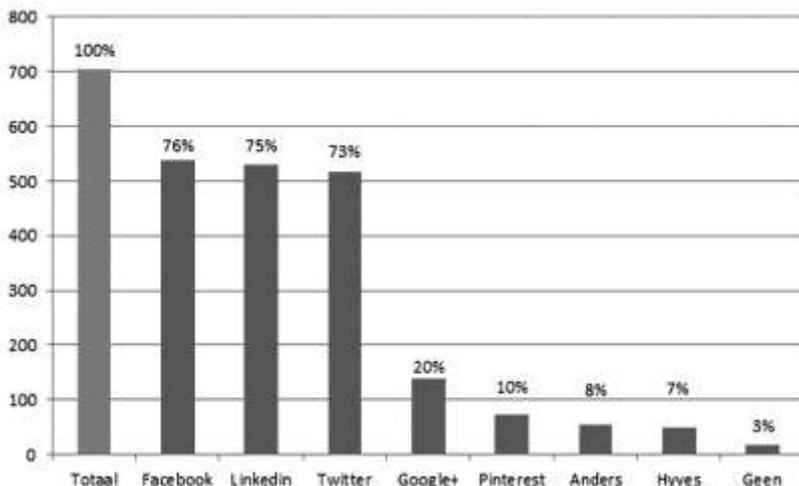


Figure 4: Scores on "which channel do you use". The first column is the total number of respondents: n = 705

Communicating via social media

Nine out of ten respondents (89%, n = 628) want to communicate with their municipality through social media channels. Twitter is by far the preferred channel, 62% (n = 436). Facebook (37%) and LinkedIn (21%) remain far behind, but still have a very high score. Especially young people (18-29 years) want to communicate via Twitter: 75%, while from the same target group, almost half (47%) would consider Facebook a good channel as well.

Of respondents older than 50 years a third would like to communicate via a different channel (too). Overall, that's almost one quarter (23%, n = 164). Alternatives mentioned are e-mail (n = 106) and the website (n = 57).

Information received via social media

Even more respondents (93%, n = 655) want to receive relevant information from their community through a social media channel. Here, too, Twitter at the top, now with 60% (n = 423). And here also Facebook (40%, n = 282) and LinkedIn (21%, n = 149) are at an appropriate distance.

This time it is mainly people between 40 and 49 years who would like to use a different channel (34%, n = 58). The 50 + group stays a little behind with 32% (n = 59). Again e-mail (59%, n = 106) and the website (32%, n = 57) are mentioned most often.

The results show that especially young people (18-29 years) on Twitter want to communicate and to receive information. To both questions, three out of four young people give this response. Although Twitter is mentioned most often by all respondents, Facebook and LinkedIn are also frequently cited.

Apparently the respondents see Twitter as a channel through which they want to communicate and Facebook more as a channel to receive information. The traditional online resources, email and the website, are still very popular though.

Pinterest and Hyves are, according to the respondents, no appropriate channels to communicate and also Google+ remains far behind with 7%.

Did you previously contact your city?

When asked whether respondents have already contacted their municipality through social media channels, more than a third of respondents (35%, n = 244) said that they had not previously thought of this possibility and that they will do so in the near future. Nearly a quarter of the respondents (24%, n = 168) reported not having done this yet because their city doesn't provide this option.

Of the respondents, 17% (n = 117) asked a question through social media and got an answer. In contrast, 11% (n = 76) never got their question answered. The last option in the question was "no, I do not use social media". 74 respondents (10%) gave this response.

Many respondents (n = 81) have indicated in their comments that they missed an option in this question which could be marked as "not yet done so and will not do this." However, 96% of respondents ultimately chose one of the response options. Only 4% did not answer this question.

On what subjects would you like to have contact?

Respondents state that in first place they want to communicate about public space alerts (71%, n = 504). In second place, information on diversions in the city (62%, n = 436), closely followed by information on events (61%, n = 431).

Least liked, with 29% of the respondents, is information on taxes and subsidies. Although this is the lowest score it's still almost a third (n = 200) of respondents.

One of the respondents said that only after completing this question, he could visualize different topics on which he would like to communicate on social media with his city. The saying 'unknown, unloved' may therefore be applicable.

17% of respondents chose the option "other". 40% of them (n = 48) hereby claims to want no contact with their municipality. One out of 10 (8%) indicated they want all options (general information), about the possibilities of e-participation and specific information about the neighborhood they live in (custom information).

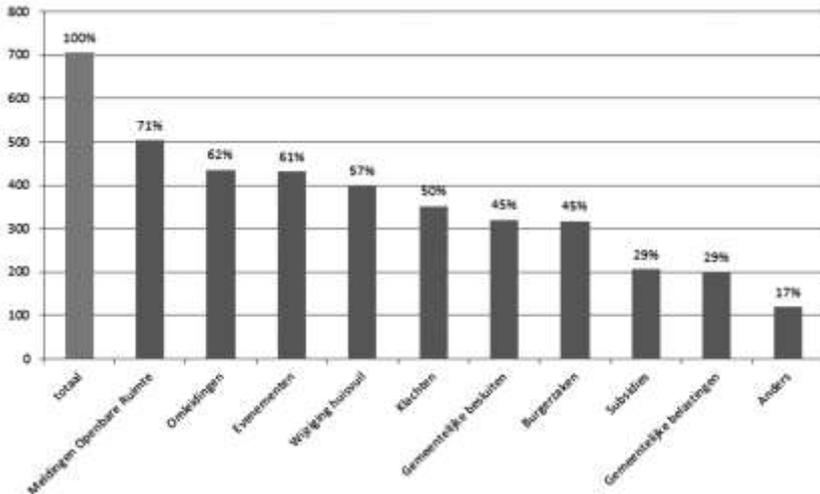


Figure 5: what would you want to communicate with your community via social media channels. The first column is the total number of respondents: n = 705.

In summary

The online citizen is waiting for you. Nine out of ten people want to communicate online and to receive information through their social media channels. As expected, this percentage is higher among young people than among older people. Twitter and Facebook are the channels that are most mentioned.

It remains important though, even when people are active online, to take into account the fact that you always need a cross-media strategy. A quarter of the respondents indicated that they also want to communicate through e-mail or the website of the municipality and around 10% of the respondents indicated they don't want to use social media channels to communicate.

As a government we need to think through what channels our citizens want to reach us. We may think that it's good to have separate sites for separate subjects, but if the online citizen has a good tool they want to use, it's not logical to hold on to that one channel and keep the other closed.

Nevertheless, the most important aspect is to inform people where they can ask their questions. The website of the municipality, if easily found, might

be the best place to inform people. Many citizens will primarily visit the website to see where they can access city employees. If there is clear how and through which channels the city can be contacted, then citizens can choose which channel they prefer.

Unknown means unloved. If citizens do not know which questions they can ask, and where, they will not ask at all. By properly using social media to communicate, people will ask a question earlier, and more people will see what questions they can ask. Service will then improve.

Use your social media channels as they are intended and as the citizens want to use them. And if more questions are raised by these channels, then surely that is a good thing? Municipalities are provided for the people who live there and if social media can improve the way they feel treated by their city, then use it!

Social media makes dialogue possible, especially micro-blogging systems such as Twitter. If a municipality has a Twitter account, then it must also communicate via this account. Communicating through these channels is different, but also easy. The added value is that it is an accessible medium to ask questions and comment. Short communication is possible.

And lastly: show that communicating with your municipality can be easy and fun! Cities should upgrade their fun-factor. Make short movies and nice infographics. Give away free tickets to your citizens. Make it worth for them to make an effort helping you and the city.

The cities that participated in study 1

Africa

Cape Town

Asia

Taipei, Taiwan

Australia (/ New Zealand)

Auckland, New Zealand

Brisbane, Australia

Cairns, Australia

Christchurch, New Zealand

Dunedin, New Zealand

Gold Coast, Australia

Hamilton, New Zealand

Perth, Australia

Europe

Antwerp, Belgium

Athens, Greece

Barcelona, Spain

Bologna, Italy

Bordeaux, France

Brussels, Belgium

Burnley, England

Dresden, Germany

Florence, Italy

Geneva, Switzerland

Grevenbroich, Germany

Hamburg, Germany

Innsbruck, Austria

Kocaeli, Turkey

Leipzig, Germany

Liverpool, England

Lorca, Spain

Murcia, Spain

Nantes, France

Newcastle Upon Tyne, England

Riga, Letland

Rimini, Italy

Stockholm, Sweden
Stuttgart, Germany
Szczecin, Poland
Tallinn, Estland
Tel Aviv, Israel
Toulouse, France
Vienna, Austria
Warsaw, Poland
Wiesbaden, Germany
Zürich, Switzerland

North America

Austin, Texas
Boise, Idaho
Boston, Massachusetts
Cincinnati, Ohio
Cleveland, Ohio
Colorado Springs, Colorado
Fresno, California
Huntsville, Texas
Jacksonville, Florida
Lansing, Michigan
Montreal, Quebec, Canada
Oklahoma City, Oklahoma
Philadelphia, Pennsylvania
Salt Lake City, Utah
St. Petersburg, Florida
Tampa, Florida
Vancouver, Canada
Washington DC, Columbia

South America

Brasilia, Brazil
Porto Alegre, Brazil
Manaus, Brazil
Montevideo, Uruquay

