


The Daily: Why time spent online is falling, people's changing search behaviors, and announcements from MWC 2023

Audio





On today's episode, we discuss why time spent online is falling, how folks use social media, and people's changing search behaviors. "In Other News" we talk about the most interesting developments to come out of this year's MWC event. Tune in to the discussion with our analyst Bill Fisher and Angela Wiesenmüller, vice president of global demand generation at Meltwater.



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Episode Transcript:

Marcus Johnson:

Hey, gang. It's Tuesday, March 7th. Listeners, welcome to the Behind the Numbers Daily, an eMarketer podcast made possible by Meltwater. I'm Marcus. Today's fact, Albert Einstein failed his school entrance exam. So physicist and mathematician Albert Einstein is arguably one of the most important and influential figures of physics in the 20th century, but Reader's Digest notes he dropped out of his school in Munich at 15 and took the entrance exam for a polytechnic school in Zurich. He flunked the botany, zoology and language sections, but passed the maths one. Einstein eventually passed the exam the next year, but struggled before eventually graduating. Struggling in school didn't prevent him from developing the special and general theories of relativity and explanation of the photoelectric effect show, per Biography. Einstein was also one of the people with the highest IQs in the world at 160, 1-6-0, similar to Stephen Hawking. An IQ between 137 and 160 is considered to be in the top 1%.

Anyway, today's real topic is a conversation between Insider Intelligence analyst and host of the Behind the Numbers Around the World podcast, Bill Fisher, and VP of Global Demand Generation at Meltwater, Angela Wiesenmüller, as they discuss why time spent online is falling, how folks use social media and people's search behaviors. Then for In Other News, we'll look at the most interesting developments to come out of this year's MWC event in Barcelona.

Bill Fisher:

Angela, I'm really excited to be able to speak with you today. Thanks for joining me.

Angela Wiesenmueller:

Bill, thank you so much for the invitation. I'm also really excited to be here.

Bill Fisher:

We're going to have a great conversation. I know we're going to talk about a fantastic piece of research, the Digital 2023 Global Overview Report, which you worked on over there at Meltwater. It really is a magnificent body of work. So why don't we kick off with you giving us

a top-level overview of the report, how it was put together, what it covers, your involvement in it, that kind of thing.

Angela Wiesenmueller:

Yeah, it is really a fantastic piece of work, and we were very excited to be able to be sponsors for the Digital '23 Global Overview Report that was produced by Simon Kemp and Kepios in partnership with Meltwater and We Are Social. And, well, just think of the report as the most comprehensive compendium of online consumer behavior from around the world. So from social media and online audiences to advertising and e-commerce trends, this report actually covers stats that you need to drive your digital strategies in 2023. And it has more than 400 pages of very deep insights.

Bill Fisher:

465, I think. I downloaded this recently. I'll be honest, I didn't read every single page, but I did have a good read. There's lots of stuff in there. It really is a fantastic report.

We're going to try and condense as much of it as we can into this relatively short conversation. So let's start with maybe headline stats. If you had to give me just one key takeaway from this report, what would it be? I know that's hard, but have a go.

Angela Wiesenmueller:

Yeah, I would like to obviously take the most important one which is also a surprising one, and that is that the 2023 Global Digital Report found that the amount of time that we spend online has actually declined by almost 5%, and that is 20 minutes per day.

Bill Fisher:

Wow.

Angela Wiesenmueller:

Mm-hmm.

Bill Fisher:

So fascinating, and you say surprising. How surprising is it given we obviously saw huge peaks in 2020, 2021, that pandemic period when digital is in such high demand? Is it surprising that

it's gone down or, I mean, is there something else at play here? Is it more than just part of that normalization of media time post pandemic?

Angela Wiesenmueller:

Yeah, I think you're right. I mean, obviously we saw a big peak throughout the pandemic years. And so as people are now able to go outside again post pandemic, meet their friends and actually have more, yeah, physical activities, it's maybe not that surprising. But as we've seen strong growth numbers, and the report even shows that overall the numbers of social media usage are growing, it has been actually the key insight of this year's report.

Bill Fisher:

Yeah, so social media time is growing even though overall online time is going down. I want to concentrate on social because there's lots going on in the social space. Like I asked before, if you could give me a top line or a key takeaway regarding social media time, social media preferences and how they're changing, what would it be?

Angela Wiesenmueller:

So if you ask me which social media platforms are leading the way and if we rank platforms by monthly active users, which offers perhaps the most consistent basis for comparison, the latest official data suggests that Facebook still comes out top at a worldwide level. And I think that is pretty surprising because we've seen the rise of TikTok obviously. And so to see actually Facebook, which is definitely not the choice for, I think, the young people still being, in terms of the active users, at the top level worldwide, I think that is really good to know and also important for marketers to know.

Bill Fisher:

Absolutely is. It's so often discounted, but it is... I mean, when you start talking about ad revenues as well, Facebook still leads by a long way for those very reasons.

You've mentioned TikTok, though, and I do want to delve into this a little bit because in talking about time spent, and obviously you've mentioned that the top line number has declined by around 20 minutes, but social media time has increased. TikTok or TikTok-like social platforms or social platforms that have changed to look a bit like TikTok, it must have some kind of impact on this, right? Because the way people are consuming social media is different than before. I don't like to talk too much about anecdotal evidence and own personal experience,

but I think the data does bear this out. I'm a TikTok user and I spend hours in the platform. I just get lost in it. What does the report say about time spent on TikTok versus other platforms?

Angela Wiesenmueller:

Well, perhaps unsurprisingly, the users of TikTok has increased a lot. And right now, it ranks number six on a worldwide level. And the report also talks a lot about video content and how important video content has become as a form of entertainment for users.

And I think it also speaks about TikTok maybe not being a similar social media channel as Instagram or Facebook, for example, as users really go there for entertainment. So it puts it a little bit more into the category of Netflix and maybe other video channels or streaming platforms. And I think that's a really interesting understanding in terms of what kind of content you should also focus on when thinking about advertising, for example.

Bill Fisher:

Yeah.

Angela Wiesenmueller:

So TikTok definitely is more for entertainment versus other platforms potentially for finding information or connecting with friends and family.

Bill Fisher:

Yeah, really good point. And I think I'm right in saying in the report it shows that TikTok time is actually quite close to YouTube time, which is a very interesting comparison. But you mentioned something there about, I want to segue into, which is search. And, I mean, is social media having an impact on search? I don't want to put words in your mouth. So maybe if I ask you first of all, what do search behaviors look like around the world, and how have they changed in the report?

Angela Wiesenmueller:

Yeah, so I mean, some of the stats, they're showing that especially young people, they're using social networks more than search engines to find information. So at this point, if you're between 16 to 35, you would choose a social media platform before going to a search engine to find information on specific topics or whatever you're researching at this point.

Bill Fisher:

I like what you're saying there, Angela, that young people are relying on social because it makes me feel young even though I'm not because this is what I'm doing. Again, anecdotally, but I think the data is proving this out. I go on TikTok and as I say, I spend a long time there and it's like discovery. Rather than me searching for something specifically, I live by the algorithm now. So something is served to me that I think looks very interesting, and so I favor that and then I may come back to it later. And it might be a product and I'll go to a product site to find out more information about that.

So this is really interesting, and I think the report talks about this, how it talks about textured discovery. People want search to be less precise and more exploratory, and that's kind of what you're saying, right, with what social offers, yeah?

Angela Wiesenmueller:

Yeah, for sure. I think in terms of TikTok, it's a lot about entertaining content and maybe just having a good time versus what the report also states on Instagram. Users do go to Instagram to find out information about brands and products. So yeah, I think you can see the differences in the different platforms on what people are looking for when they go on TikTok versus Instagram versus Facebook, and that's also an important indication to what kind of content you should produce for these channels.

Because as you said, you go to TikTok to get entertained, to actually get surprised on what the feed will present to you, and that is a chance for marketers to understand what could they produce to actually catch you there. But then again, it needs to be really fast because that's what we see as well. If you can't catch people within the first second, I would say, and correct me if you see that differently, Bill, but I'm assuming as soon as you lose the interest after second, then you move on to the next TikTok.

Bill Fisher:

Oh, time is of the essence. I'm a complete goldfish these days. Absolutely.

So you've segued perfectly into my next question actually, Angela, because I was going to ask next about everything that we've spoken about, about how behaviors have changed, how social media preferences have changed, how time spent has changed. I want to dig into what this means for advertisers broadly. You've already spoken a little bit there about grabbing

people's attention. What other things do advertisers need to think about broadly in terms of what this report has uncovered in terms of digital behavior changes?

Angela Wiesenmueller:

Yeah, I would like to go back to the key point that the report has revealed, is that people are spending 20 minutes less per day on social media, and they want more purposeful and more considered content. And I think for marketers to really understand the target audience, to understand who do we want to reach and what is important for my customers, I think being able, then, to adjust that content based on the platform and based on the behavior and the interest of that target audience, that is really going to be key. And then to tell these stories in a fast way so you catch the attention within the first second. I mean, that is also challenging, but I think it's definitely a huge opportunity for marketers.

Bill Fisher:

Yeah. I mean, I can never decide whether this is a good thing or bad thing if there's less time with which to capture people. And obviously, capturing people's attention on TikTok, there are many challenges involved in that. But... Sorry, I keep talking about TikTok. It's because I'm on it on all the time. But other platforms as well. Yeah.

Angela Wiesenmueller:

But, I mean, Bill it... Quickly, if I can ask you a question as well, if you're on TikTok all the time, are you actually getting advertising from brands on TikTok that you respond to? Because I have been on TikTok a little bit, but I have not seen anything really that has caught my interest.

Bill Fisher:

Yeah, so the... Thanks for asking the questions and turning into the interviewer. This is great. The ads that I see that are branded as ads, I swipe straight off. The stuff that gets me is the the how-tos or the influencers, as they are called, who are using a product or they're doing an explainer in some way. And I'm Gen X, I'm only on TikTok because I've got young kids. That's the only reason I'm into it, by the way. I'm not really that young at heart.

But I get served these DIY stuff. I'm hopeless at DIY, but I've started liking them because I want to learn about it. And so now, I see lots of stuff that... products that are really interesting and I think, "This can save me time and money and I'm going to use this." So this is how I'm discovering these brands, and then I'm going off the platform to look for them. I mean, this is

the next.. Well, it's not the next issue. This is one issue that TikTok is trying to get around when it comes to social commerce, right, is to keep people on platform, but the off-platform stuff is how I'm discovering a lot of stuff, I think.

Angela Wiesenmueller:

I think you pointed out a really important part for marketers as well that is also mentioned a little bit in the report, is when you were talking about influencers. And brands are using influencers more and more to leverage, I mean, the trust that they have with the audience to also bring across their message. Maybe you're trusting these influencers to give you the right tutorial on certain things, or they convince you to visit, then, a brand's website to learn more about the product. And that's definitely something that the Kepios report also states, that overall people trust media less and they trust brands more. So I think also working in a clever way with influencers and using the trust that they have with their audience is definitely something that has a big opportunity for companies.

Bill Fisher:

Yeah, trust has always been the final frontier, and I'm not sure it's getting any easier. Probably harder. So, Angela, this has been a really fantastic conversation. Thanks so much for taking time to speak with me.

Angela Wiesenmueller:

Bill, thank you so much for having me.

Marcus Johnson:

All right, folks, time for the second half of the show. And we keep Bill around so he can help us today with In Other News. Bill, thanks for hanging out for a few more minutes.

Bill Fisher:

It's a pleasure to be here.

Marcus Johnson:

All right, sir, today in other news, what went on at this year's MWC 2023?

Speaker 4:

[inaudible 00:16:02] one.

Marcus Johnson:

Story one, this is the only story we have. The only story at this year's MWC 2023, the mobile tech show formerly known as Mobile World Congress, 80,000 folks descended on Barcelona to peek into the future. Joanna Stern of the Wall Street Journal identified three themes at this year's event. Number one, AI making phones smarter. Samsung looking to incorporate generative AI products from Microsoft and Google. Number two, mixed reality will change our interactions. Lighter and cheaper headsets and faster 5G networks will make talking with holographic avatars feel more natural. Number three, IoT, the Internet of Things, will connect everything more than just your smart doorbell telling your phone when someone is there. But Bill, what to you were the two most interesting announcements from this year's MWC and why? We'll take the first one.

Bill Fisher:

Yeah, I'm going to steer clear of hardware, actually, and I'll start by talking about some interesting tension between the mobile network operators and the big streaming providers. So on a keynote on the first day, Orange's CEO Christel Heydemann addressed fair use. So-

Marcus Johnson:

So Orange being a mobile network provider.

Bill Fisher:

Exactly. European-based mobile network provider. And she made the point that every year, these big mobile network operators are investing billions of pounds to make their networks faster. And who benefits? The streaming providers. They don't pay anything, so there was talk of taxing them. Obviously, the streaming providers don't want that. Netflix said, "Hang on, our margins are much slimmer than yours. If anything, you should be paying us to have our content on your networks."

Marcus Johnson:

That's brazen. It's because content is king, content being the streaming stuff. But the pipes, the pipes are the ace. Without the pipe... You would've thought they would've been trying to

have a more civil relationship because they definitely need one another. I do wonder how much bandwidth streaming is taking up.

Bill Fisher:

It's a huge amount.

Marcus Johnson:

It's got to be, what, 67... It's got to be a significant majority, one would assume.

Bill Fisher:

Yeah, yeah. There are a small handful of providers, Google, Apple, Netflix, Facebook maybe, are hoovering up so much of this capacity. This is off the top of my head, but I think it's around 50% of all-

Marcus Johnson:

Wow.

Bill Fisher:

... capacity on mobile networks.

Marcus Johnson:

Wow.

Bill Fisher:

Yeah.

Marcus Johnson:

Okay. So any type of resolution, or it's just the dispute burst out into the public?

Bill Fisher:

I don't think there's a winner in this. I think there's only one loser, and that's going to be the consumer. Because if Netflix gets taxed by these operators what's it going to do? It's pass on the cost to the consumer. And you know what though? The mobile network operators, if they want to, they can take more money off us already because they charge me for a data

package. Just charge me a bit more. They're just trying to... They don't want to be the bad guy, I don't think, [inaudible 00:19:07].

Marcus Johnson:

Yeah, yeah. That's a good point. All right, second most interesting announcement from this year's MWC and why.

Bill Fisher:

Okay, this was already alluded to by Joanna Stern that you mentioned, and it relates to AI and generative ai. There was a big buzz about MWC this year. In the absence of quite so much buzz about the metaverse, this seems to have filled that void. However, there was some underlying conversation as to how AI could actually help power the next wave of the metaverse because obviously, AI can be used for everything, right? And one useful use of AI would be to do all the programming stuff behind the scenes for the metaverse. So who knows? MWC 2024, we might see metaverse back at the top of the agenda. Joy.

Marcus Johnson:

It seems like the tech media advertising, whatever you want to call it, world is just desperate for something to fill that void because, I don't know, since revolution is the smartphone, there doesn't that seem to have been much else for people to get excited about. We had 5G, and that's kind of here but not really because it was four and a half G, but it was marketed as 5G and no one's phone really is that much faster. And the Internet of Things is definitely not here. Then it was electric cars, and there are only two and a half million of those in America, which sounds like a lot, but there's nearly 300 million petrol cars in America. So actually, it's electric vehicles are just less than 1% of the ones on the road. So that's not a thing yet. And crypto was supposed to be a thing, and that market's tanked. And maybe it was the metaverse. It seems like they are desperate for a technology solution to no problem.

Bill Fisher:

Yeah, and AI, as I said, its tendrils reach everywhere, it seems. You know?

Marcus Johnson:

Mm-hmm.

Bill Fisher:

It doesn't have to come up in a story at Mobile World Congress. AI could come up at any industry conference around the world. There are so many uses for it.

Marcus Johnson:

Mm-hmm.

Bill Fisher:

I mean, the thing I would say about generative AI in particular, and this is my takeaway, is that I think there's a long way for it to go. It's been around for a long time already, and there's a lot of excitement now because it's made it out into the wild, ChatGPT and OpenAI. But I'm actually writing a piece about ChatGPT around the world. And in regions like Europe where regulation is quite hot, there are a lot of hurdles, to my mind, for ChatGPT and other generative AI models to overcome.

I mean, there's already been... there's litigation against... Stable Diffusion in the UK is going through the UK courts because Getty Images is claiming that it's scraped its database of images and is using them without its permission. And there are so many things like that that are hurdles for generative AI to overcome that people are getting excited about it this year. We might have metaverse MWC next year. Generative AI might not be as big a thing if regulators get in the way.

Marcus Johnson:

Yeah, if they put the clamp on it. Yeah. You mean you talked about it on your show that you host, Behind the Numbers Around the World: ChatGPT and other generative AI platform adoption across regions. That came out on February 27th, so go check out that episode. We've been talking about it recently as well on the Daily. We talked about it in terms of consumer awareness of AI and why AI search might be a disaster. That episode came out on March 6th. And we've got another episode on chat bots, what they can do for businesses and what CMOs should be thinking about when it comes to generative AI. That episode comes out March 13th.

But that's all we've got time for this episode. Bill, thank you so much for hanging out with us on the Daily.

Bill Fisher:

Awesome. It's great to be here.

Marcus Johnson:

Yes, sir. And thank you to Angela, who joined us in the first half of the show. Thanks to Victoria who edits the show, James who copyedits it and Stewart who runs the team. Thanks to everyone listening in to the Behind the Numbers Daily, an eMarketer podcast made possible by Meltwater. Tune in tomorrow for a special live-recorded edition of the Reimagining Retail show where Suzy Davidkhanian, one of our analysts, faces off in a quiz against her colleagues on consumer sentiment, the resale market and shopping in the metaverse. Hosted, of course, by Sara Lebow.