

The Social Habit - Frequent Social Networkers

The Edison/Arbitron Internet and Multimedia Study 2010

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Edison Research



How you know.SM

The Edison Research/Arbitron Internet and Multimedia Study - 2010

- 1,753 Telephone Interviews conducted in February 2010
- National Random Sample
- Ages 12+
- **18th** Edison/Arbitron Internet and Multimedia Study
- Landline & Mobile Phone Consumers



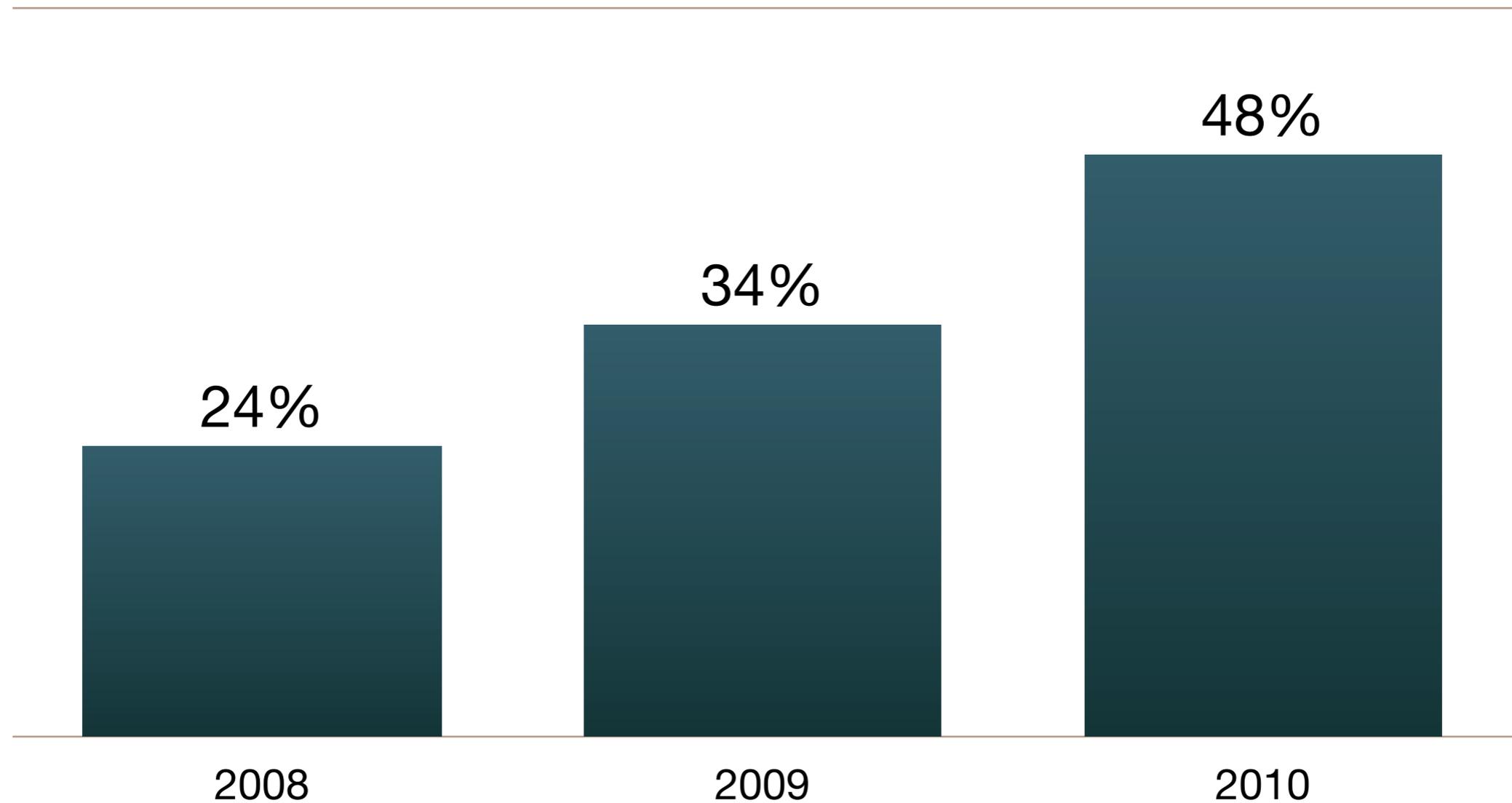


The Social Habit



Social Networking Sees Explosive Year-Over-Year Growth

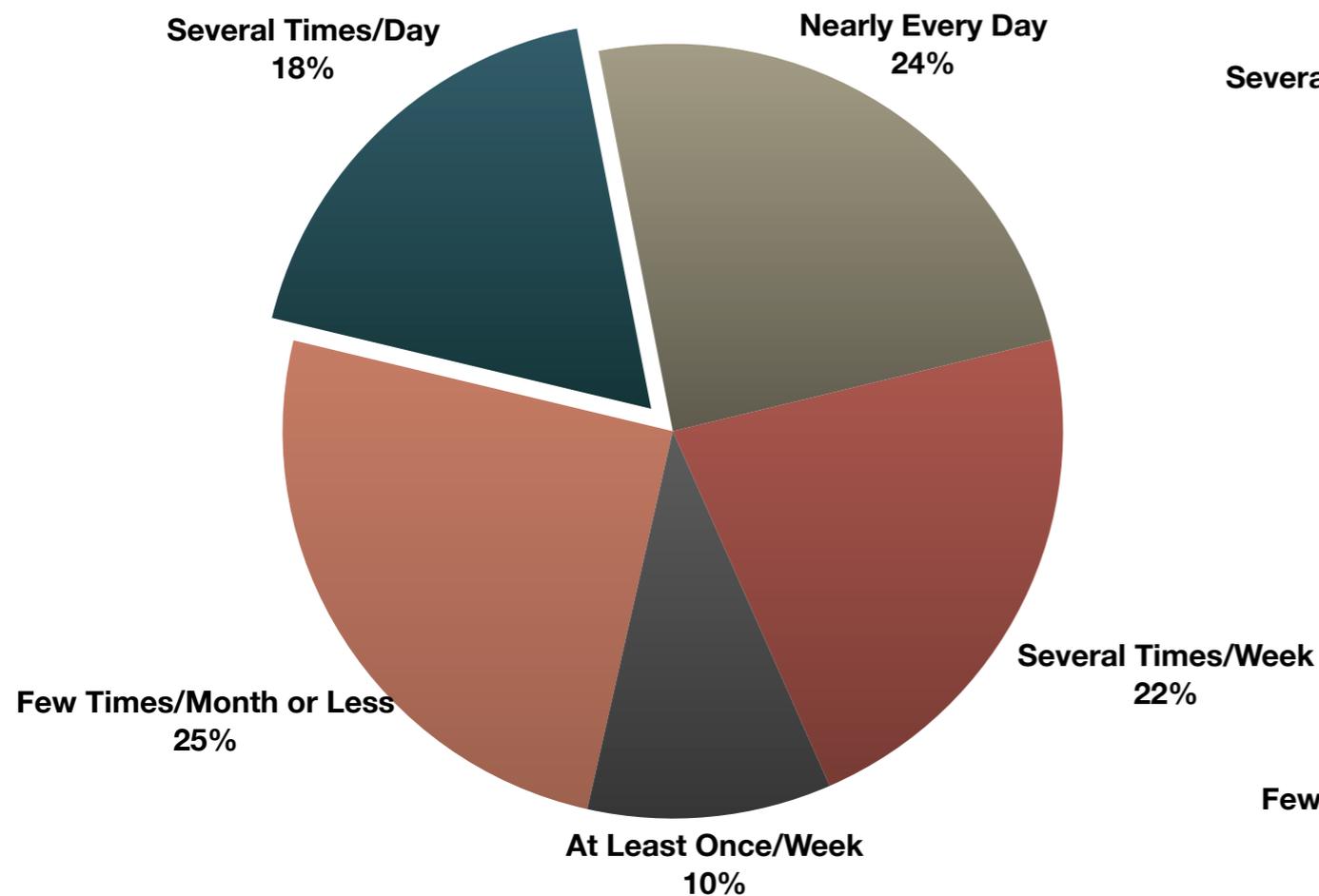
% Who Currently Have a Personal Profile Page on Facebook, MySpace, LinkedIn or Any Other Social Networking Web Site



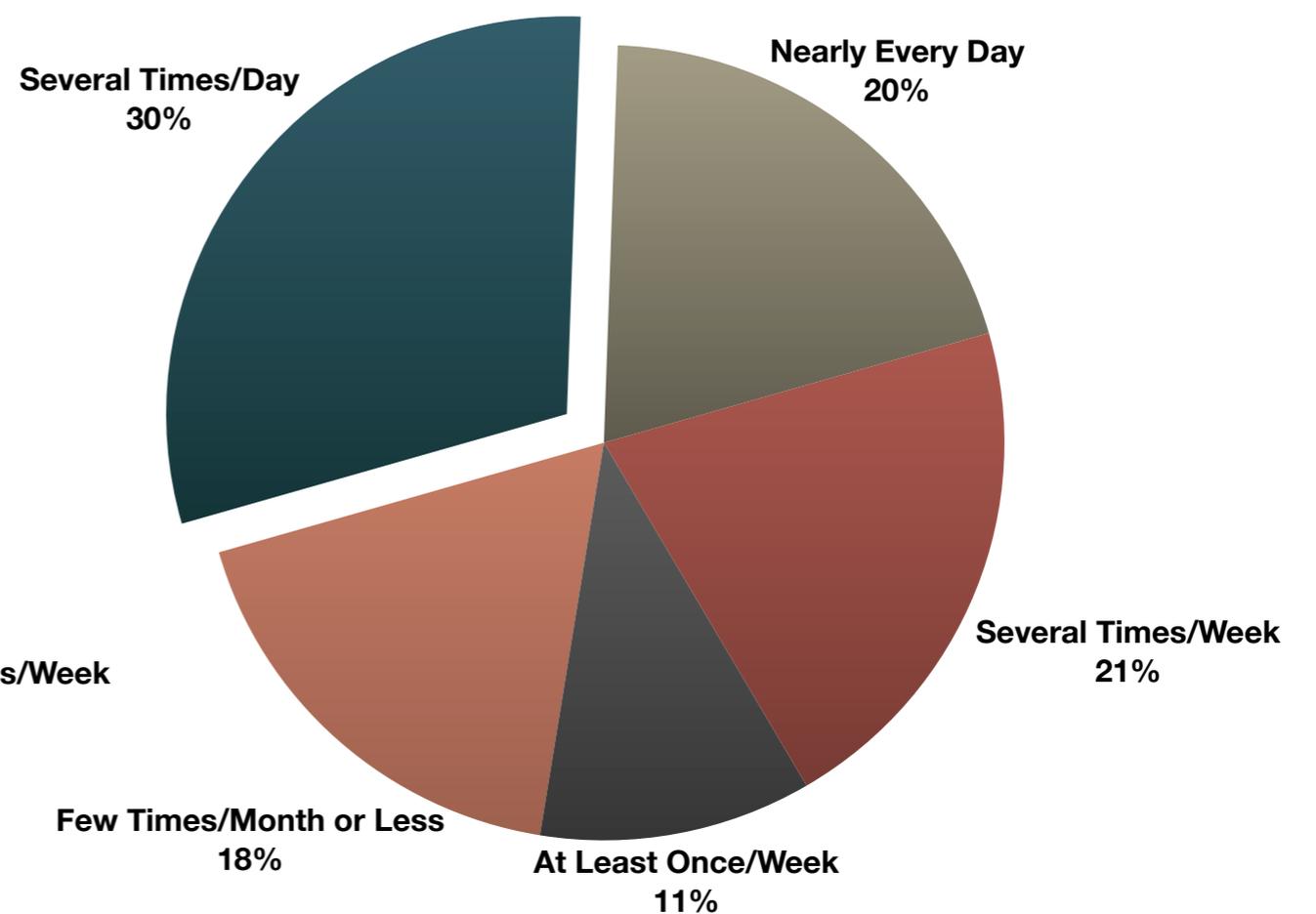
Social Network Usage Becomes Habit For Millions

“How often do you use social networking Web sites or services?”

2009



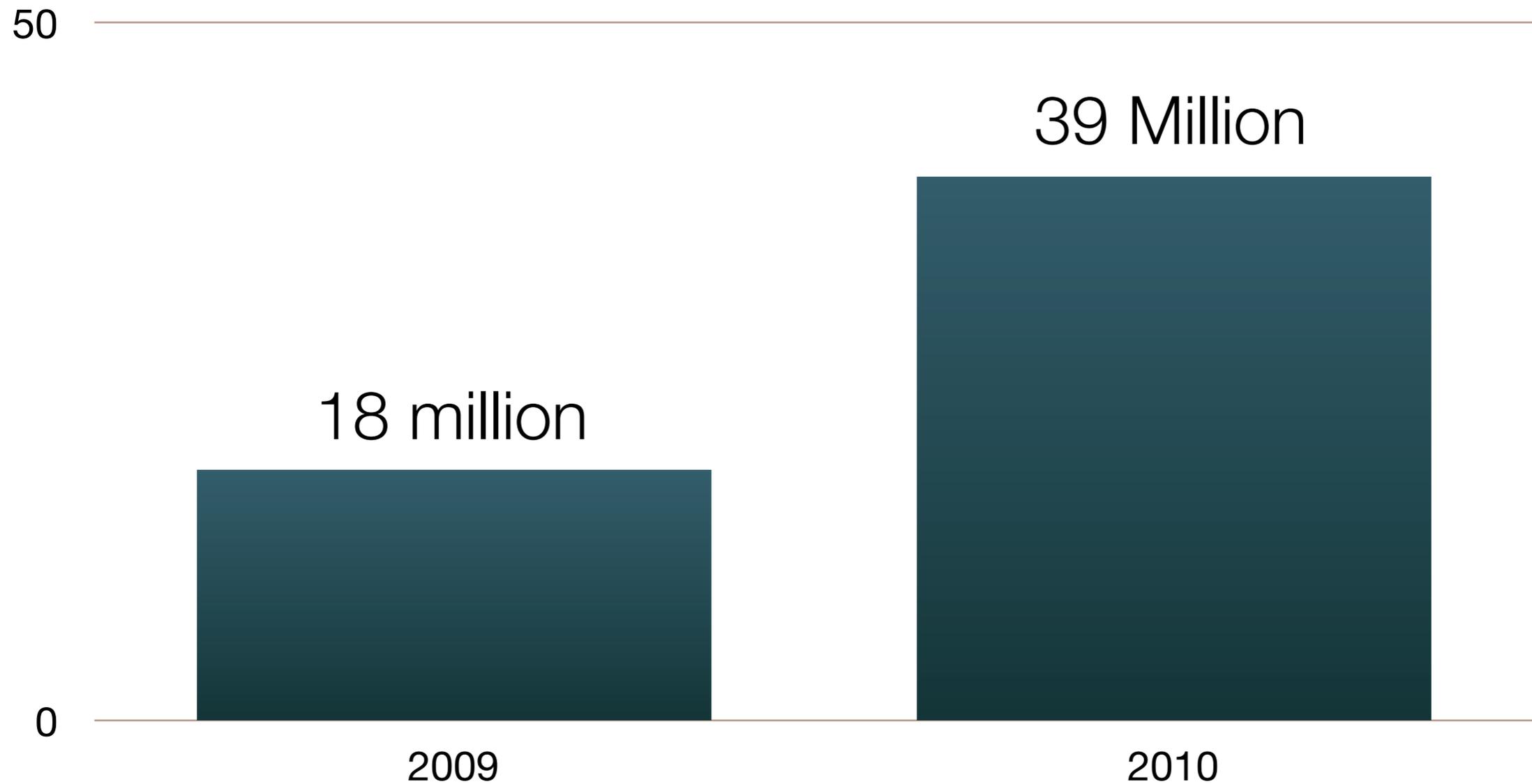
2010



Base: Have a Personal Profile Page on Social Networking Web Site

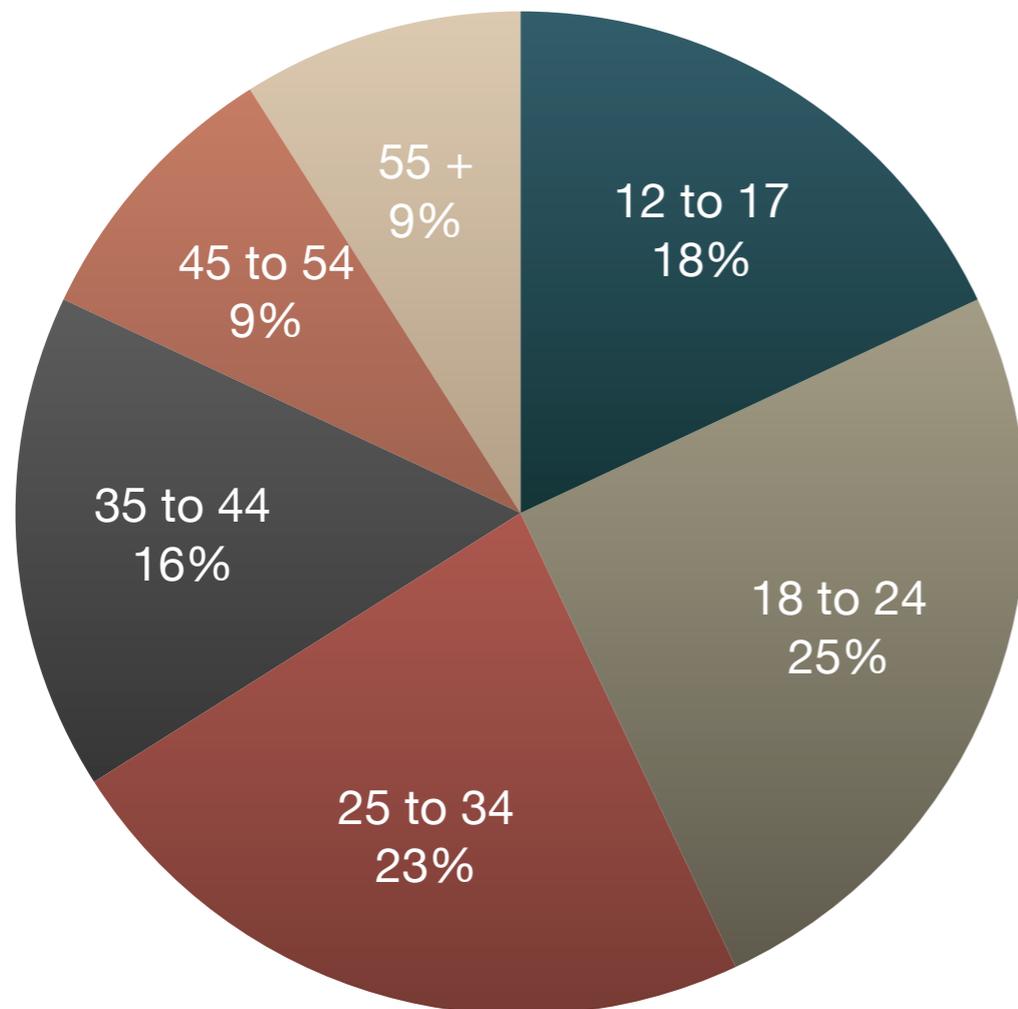
Number Using Social Networking Sites “Several Times per Day” More Than Doubles in Past Year

Americans (in millions) who Use Social Networking Sites/Services “Several Times per Day”

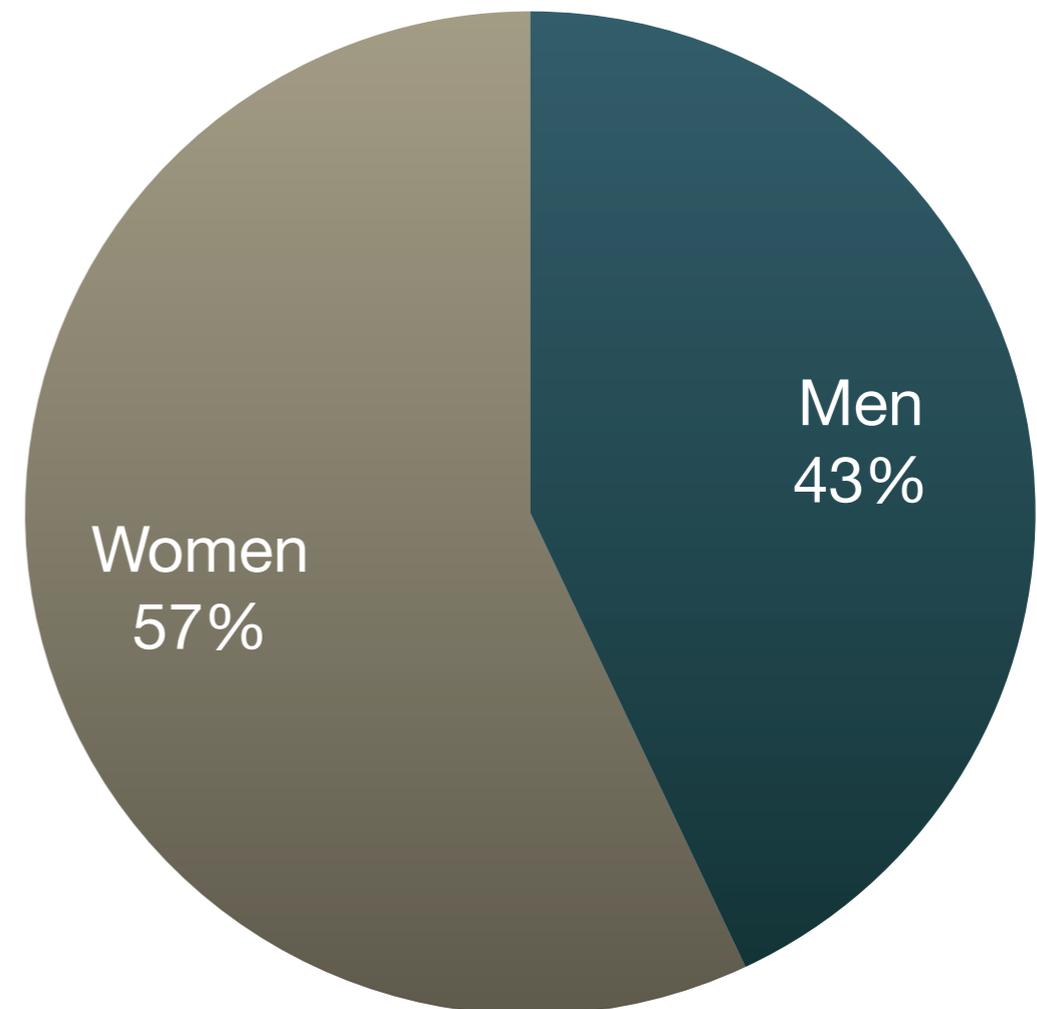


Habitual Social Networkers Lean Young, Female

Age

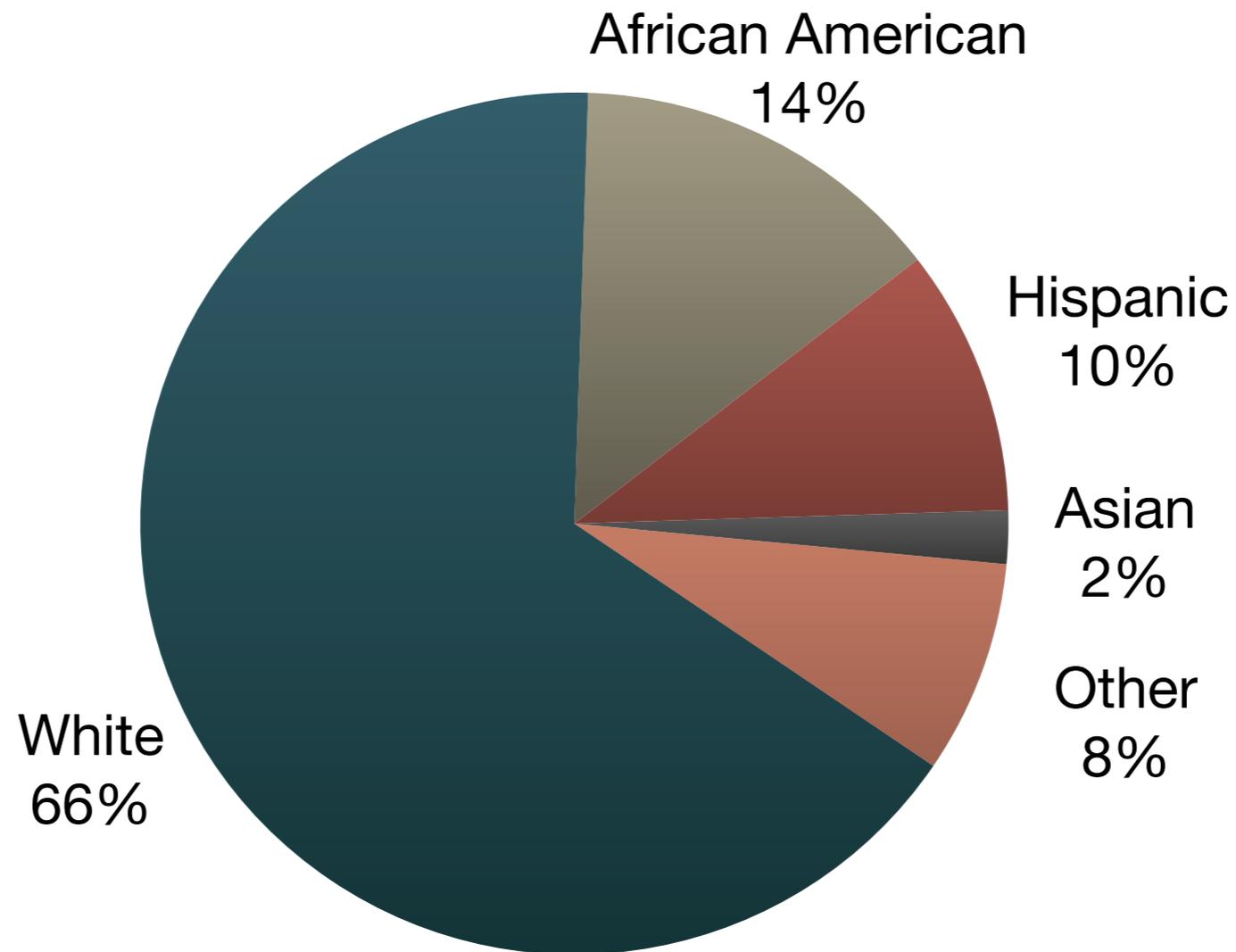


Sex



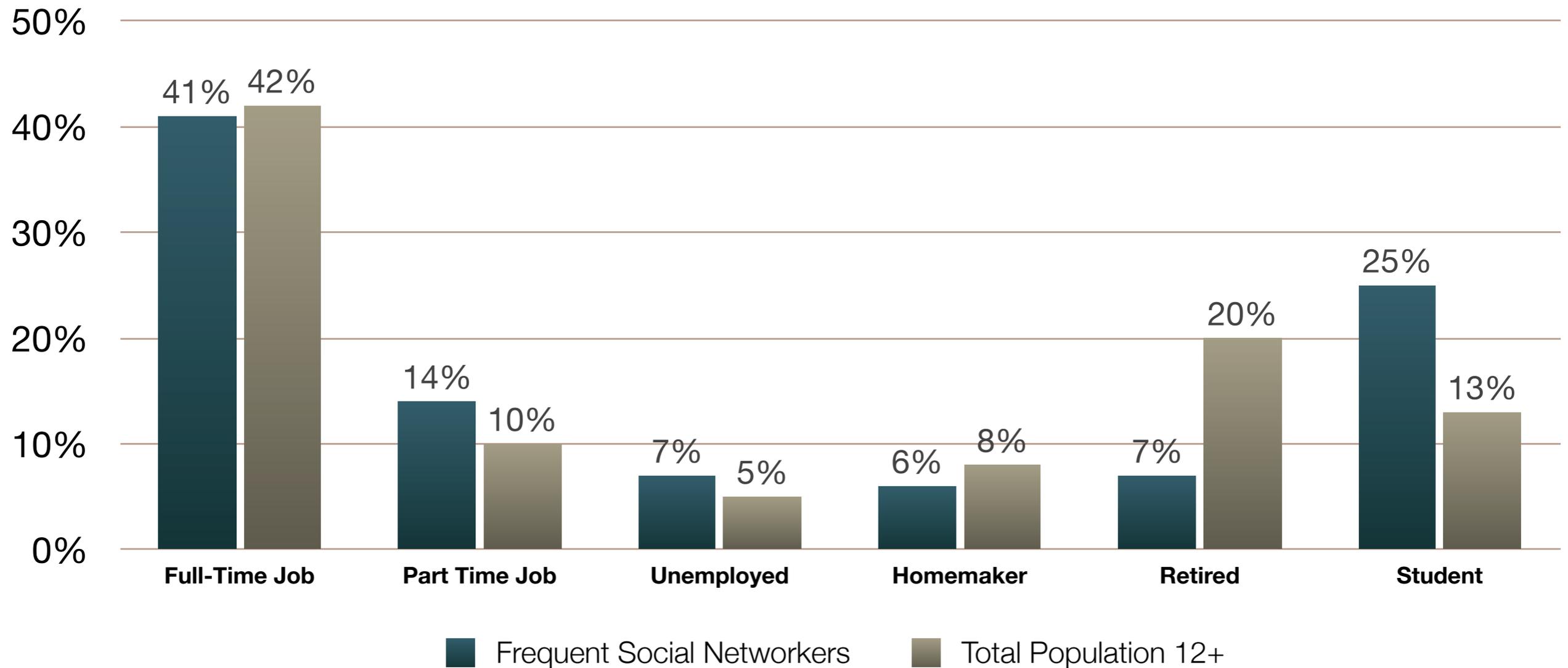
Base: Use Social Networking Sites/Services
"Several Times Per Day"

Frequent Social Networkers - Ethnic Composition



*Base: Use Social Networking Sites/Services
"Several Times Per Day"*

Frequent Social Networkers Disproportionately Drawn From Student Population



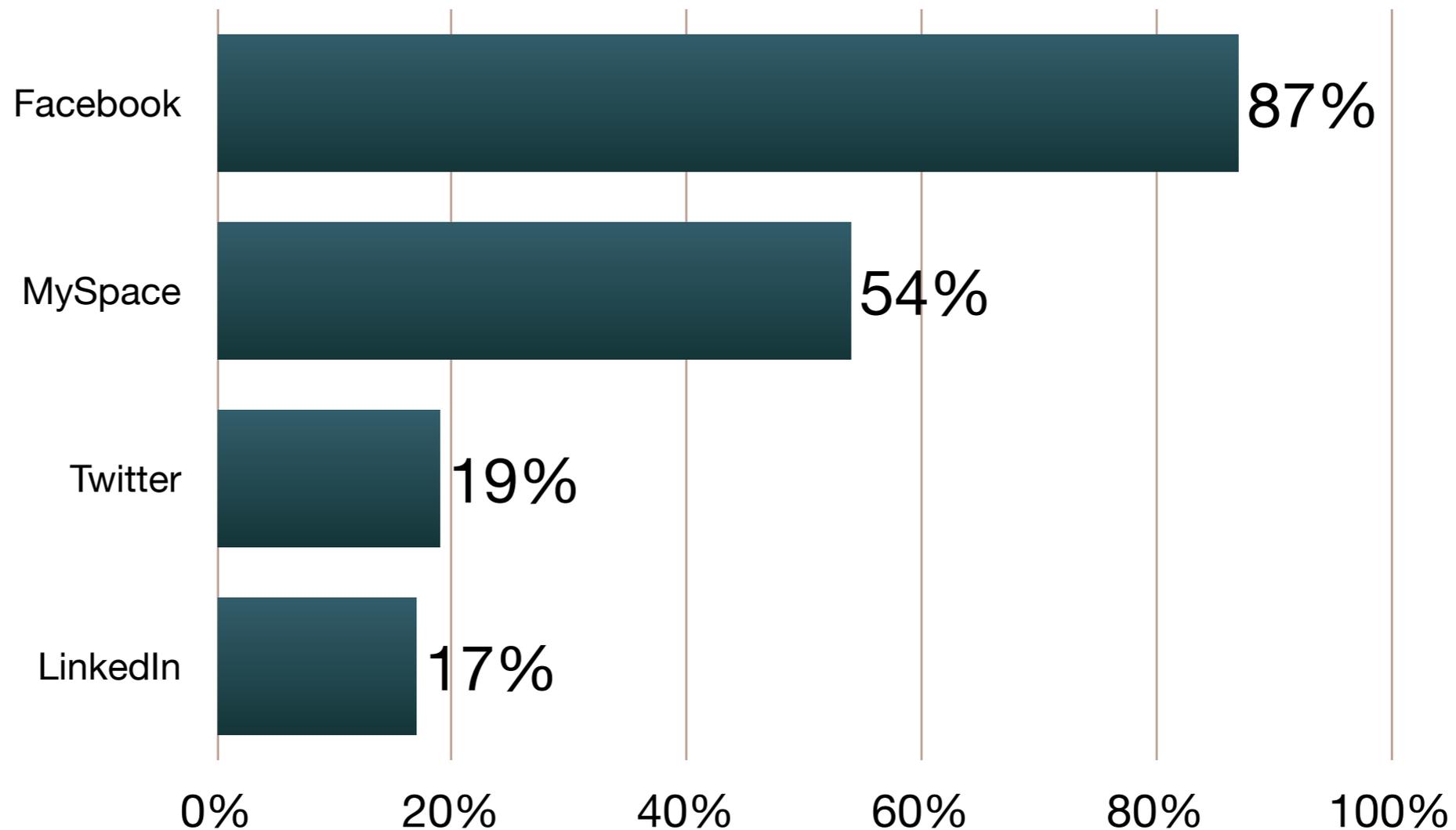


Social Networking Behaviors



Facebook By Far The Most Popular Service Amongst Frequent Social Networkers

% Who use/have a profile page on each listed service

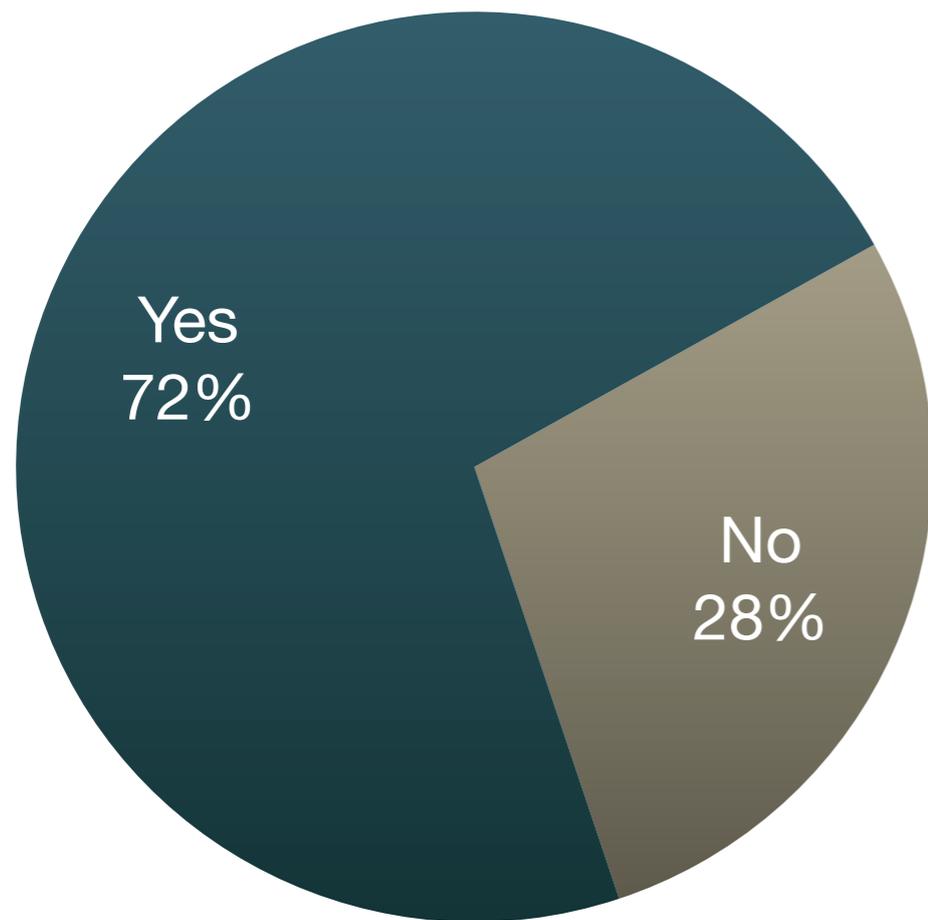


Base: Use Social Networking Sites/Services
"Several Times Per Day"

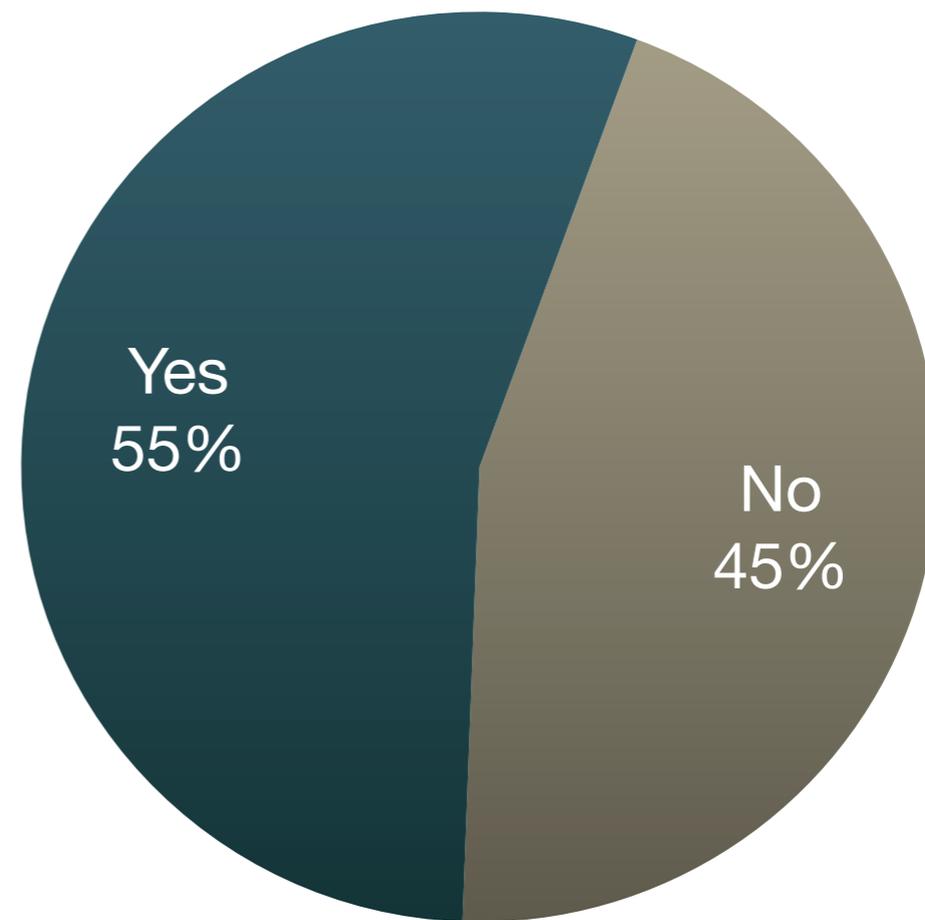
Frequent Social Networkers More Likely To Post Status Updates Than Less Avid Users

“Do you ever post status updates to any social networking Web sites or services?”

Frequent Social Networkers



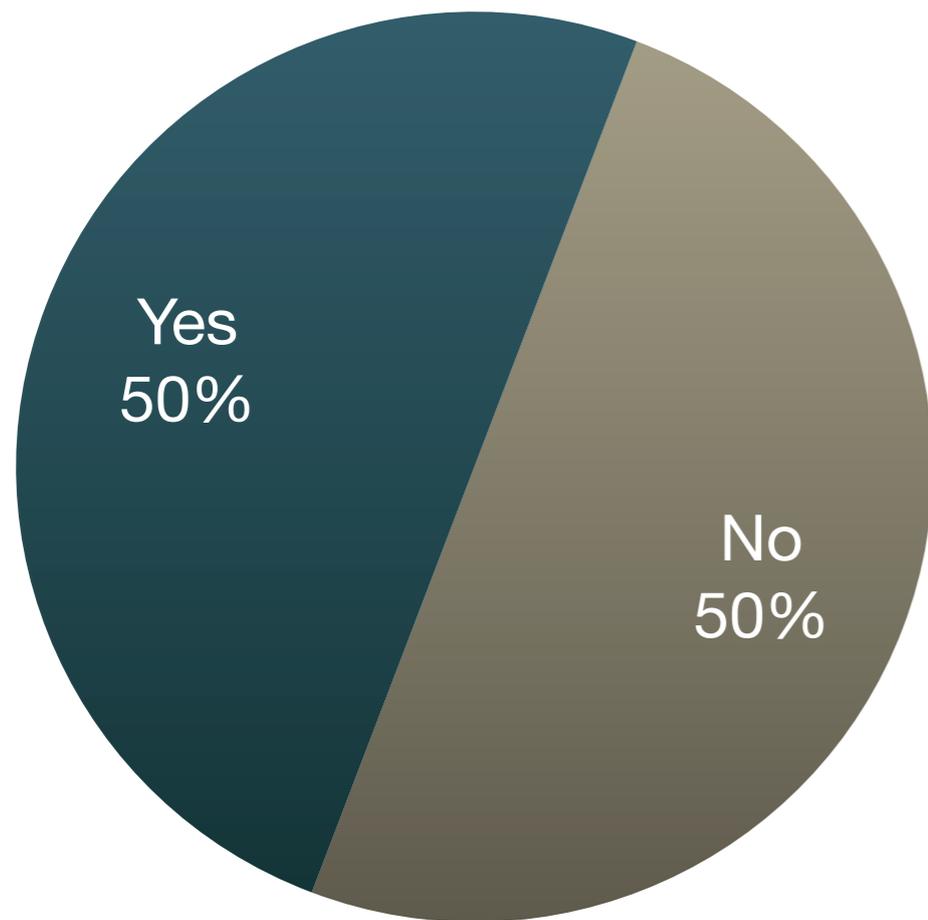
All Social Network Users



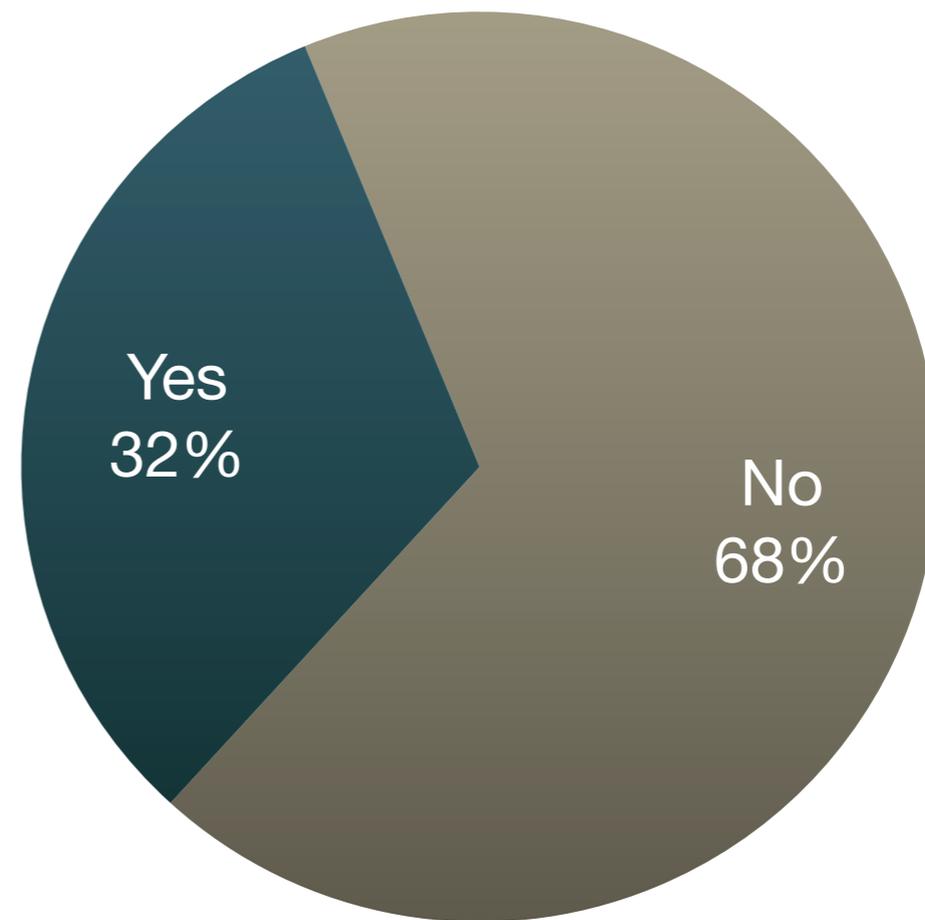
Mobile Access May Be Contributing To Frequency Of Social Network Usage

“Do you ever access social sites/services via mobile phone?”

Frequent Social Networkers

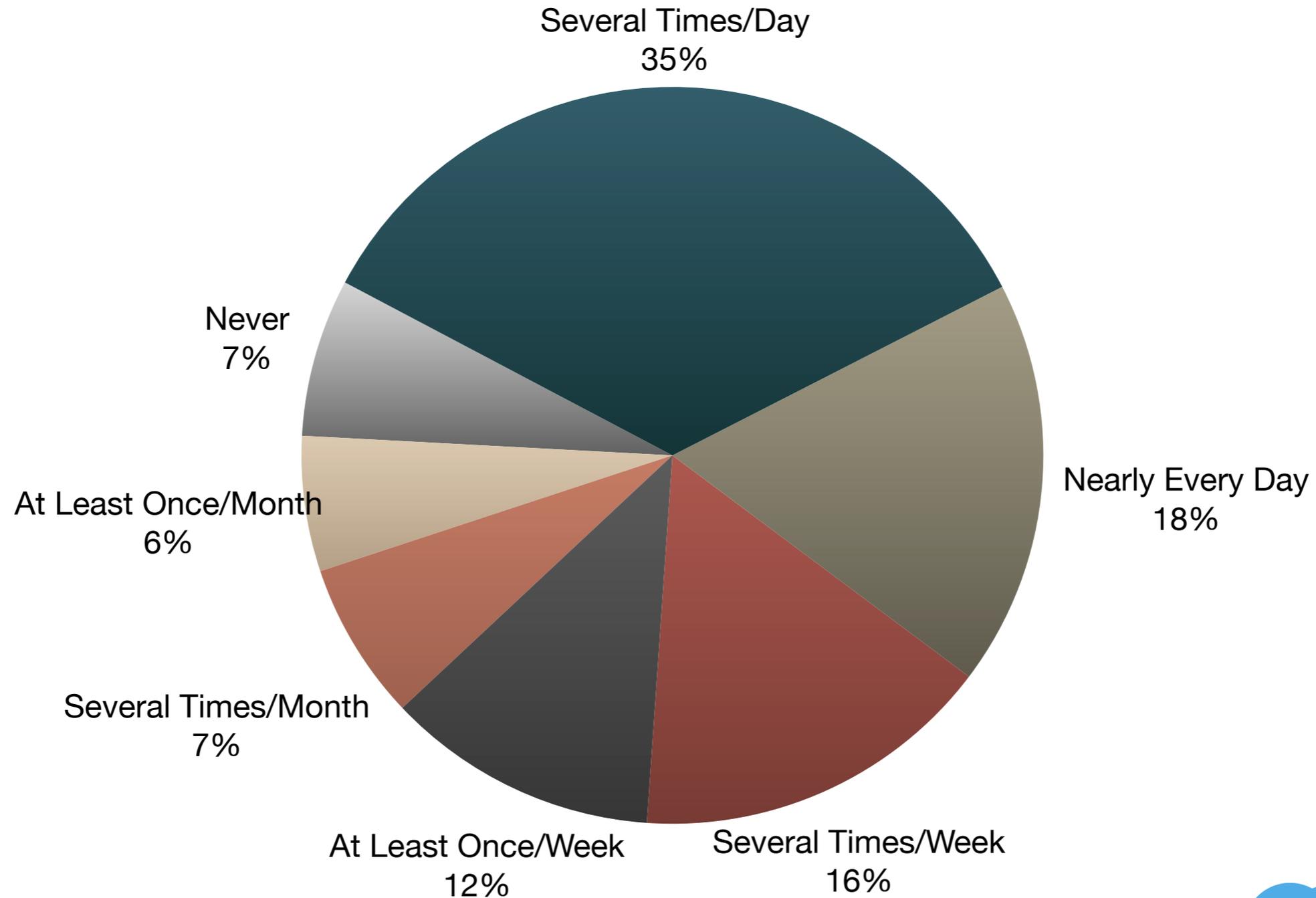


All Social Network Users



Status Updating Frequency by Platform - Online

"How often do you go to the social networking Web site to update your status?"

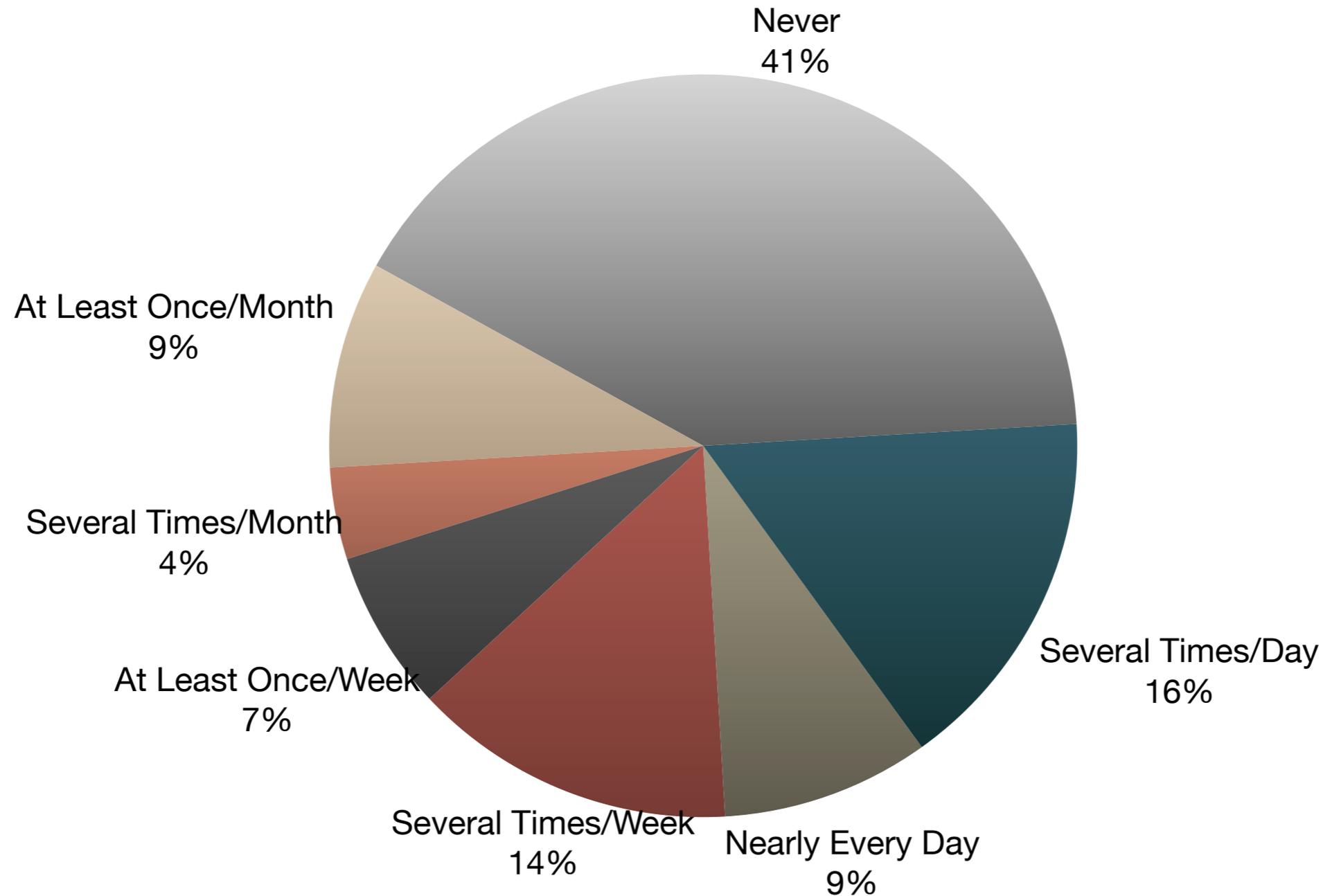


Base: Frequent Social Networkers Who Post Status Updates to Social Networking Web Sites



Status Updating Frequency by Platform - Mobile Phone

"How often do you update your status on social networking sites using a mobile phone?"

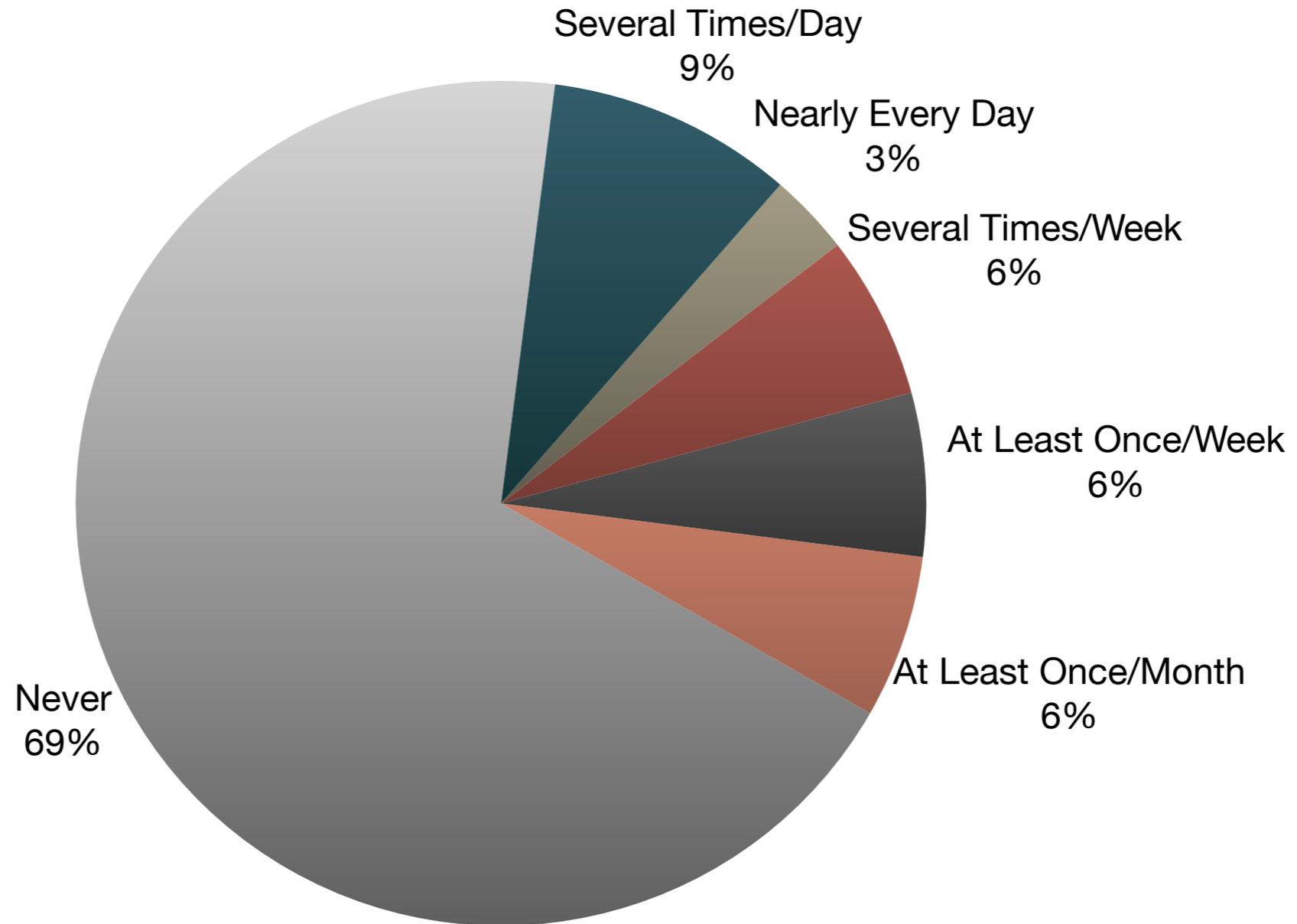


Base: Frequent Social Networkers Who Post Status Updates to Social Networking Web Sites



Status Updating Frequency by Platform - Clients

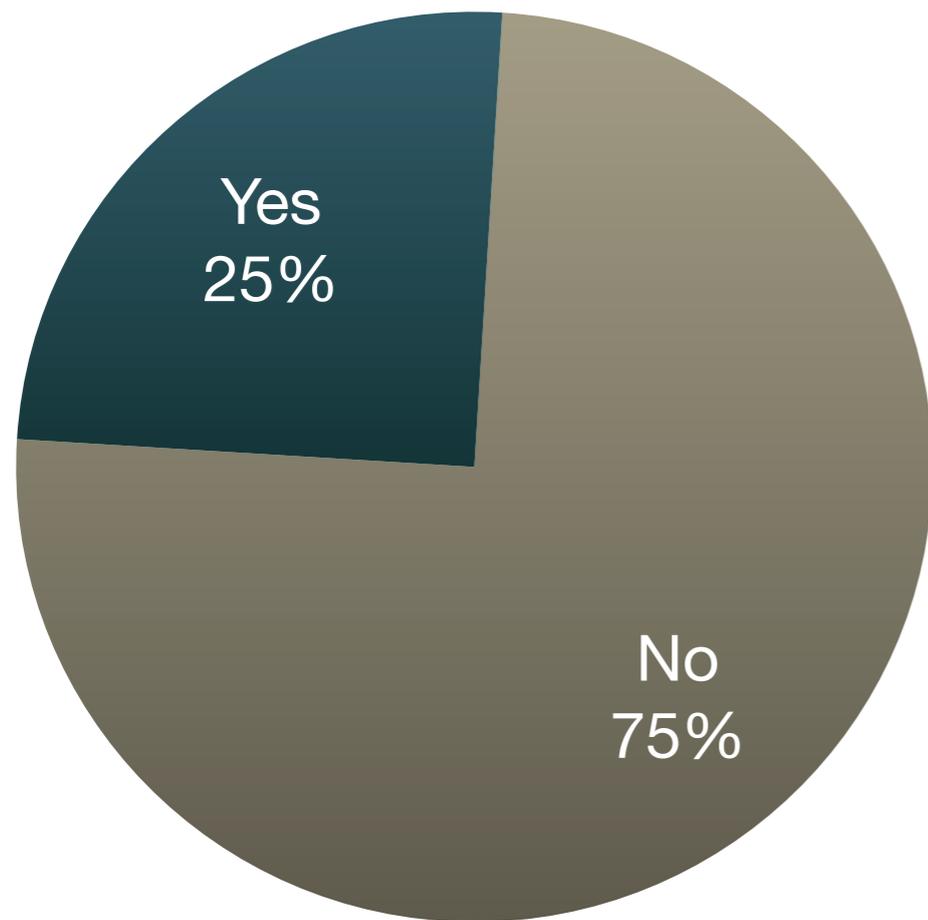
“How often do you update your status on social networking sites with a dedicated application on your computer, that is, NOT through a Web browser?”



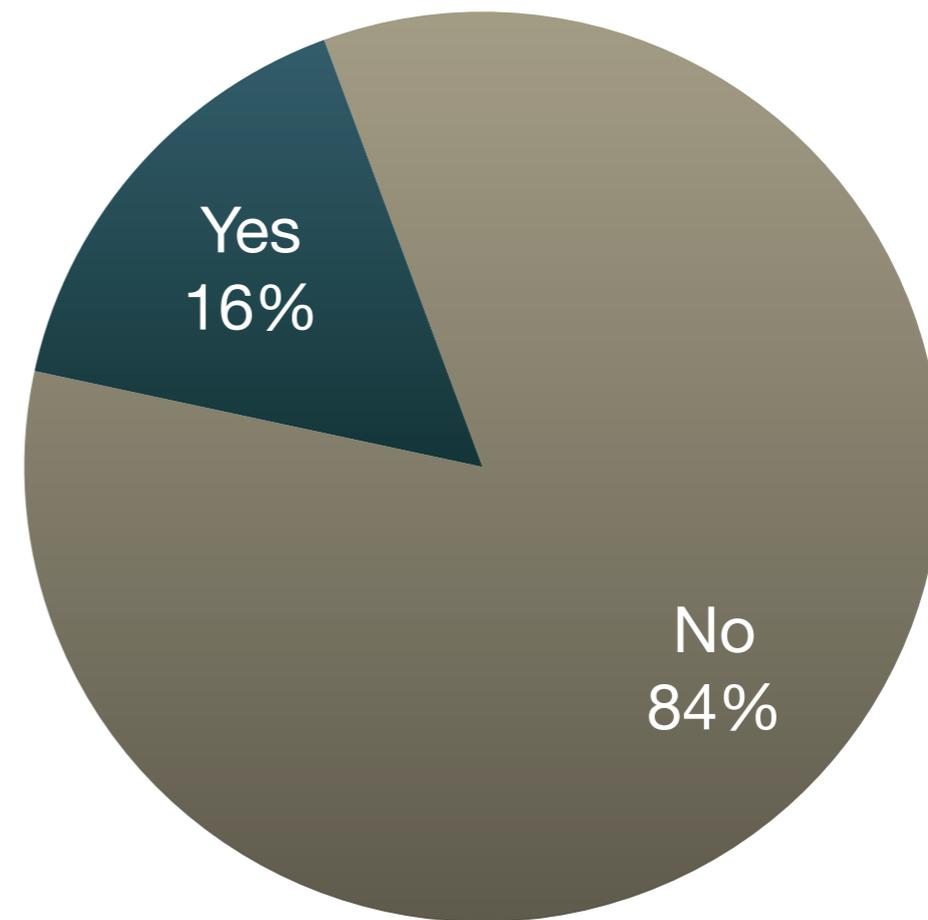
Frequent Social Networkers More Likely To Follow Brands/Corporate Social Presences

“Do you follow any brands or companies on any social networking sites?”

Frequent Social Networkers



All Social Network Users



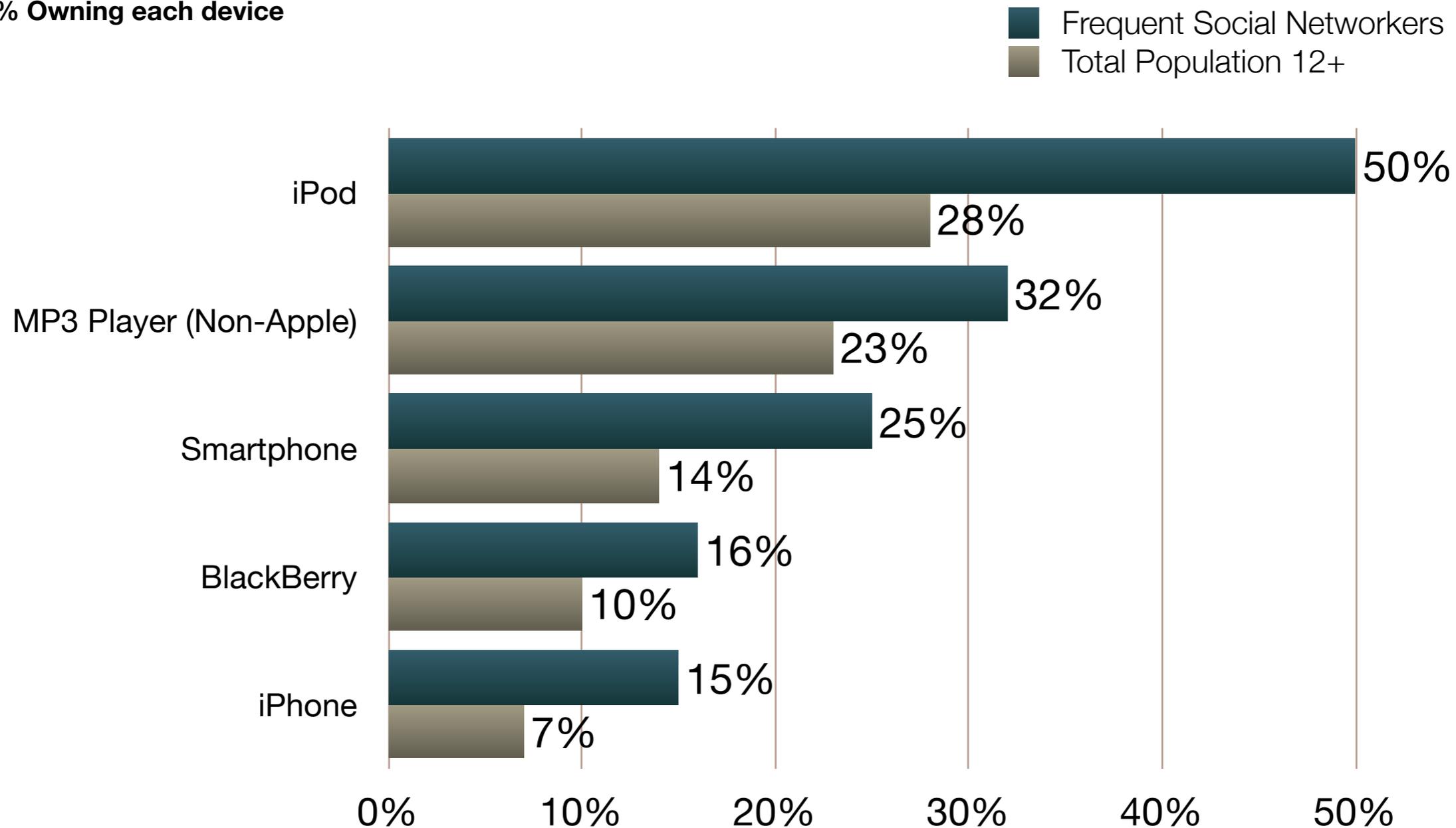


The Mobile Networker



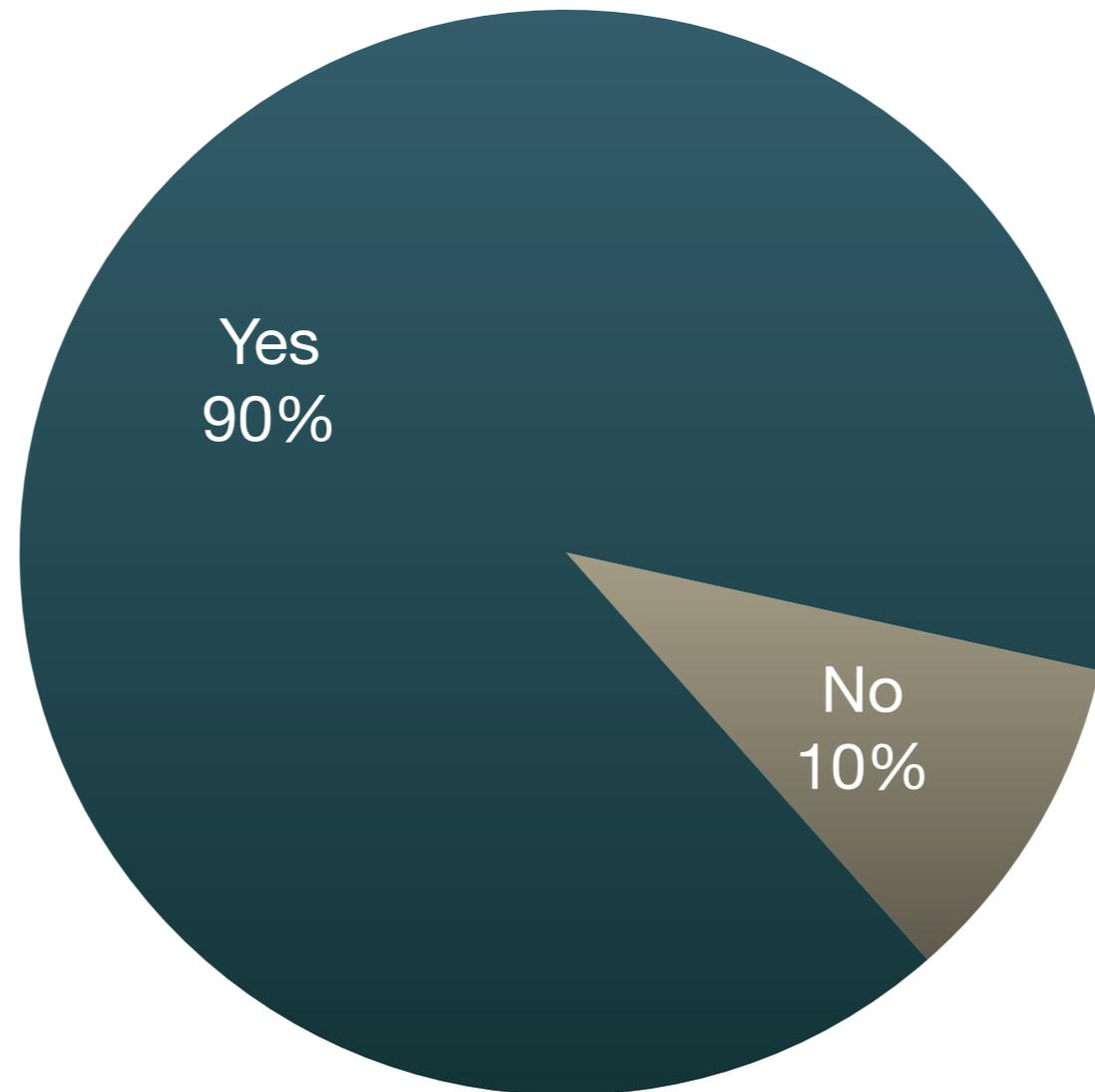
Frequent Social Networkers Are Avid Purchasers of Mobile Technology

% Owning each device



Vast Majority Of Frequent Social Networkers Own Mobile Phones

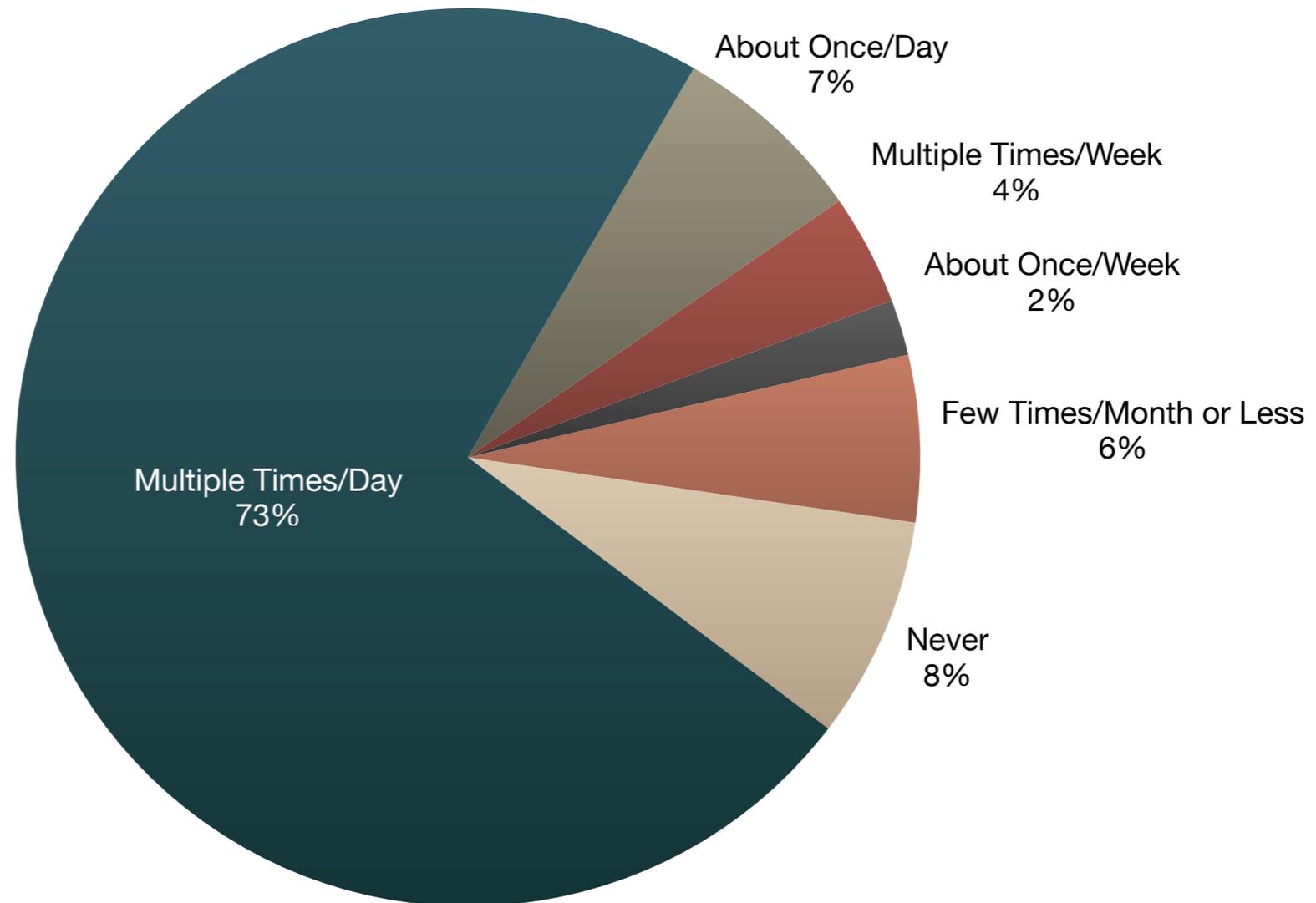
% Who own a mobile phone



*Base: Use Social Networking Sites/Services
"Several Times Per Day"*

Frequent Social Networkers Are Frequent Texters

“How often do you send/receive text messages on your cell phone?”

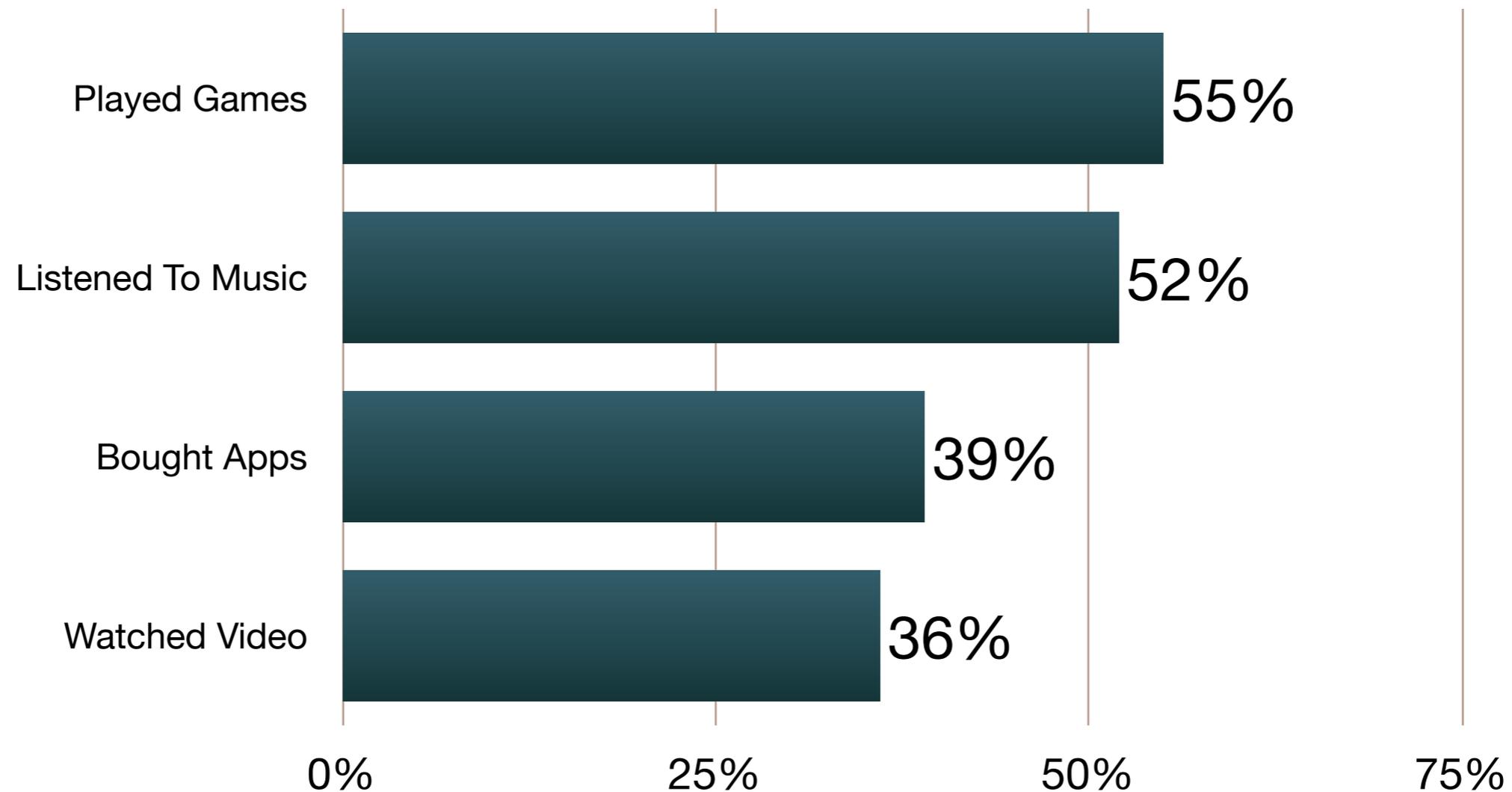


*Base: Use Social Networking Sites/Services
“Several Times Per Day” and Own Mobile Phone*



Frequent Social Networkers Relying More On Mobile Phones For Media, Entertainment

% Who have performed the listed activity on a mobile phone

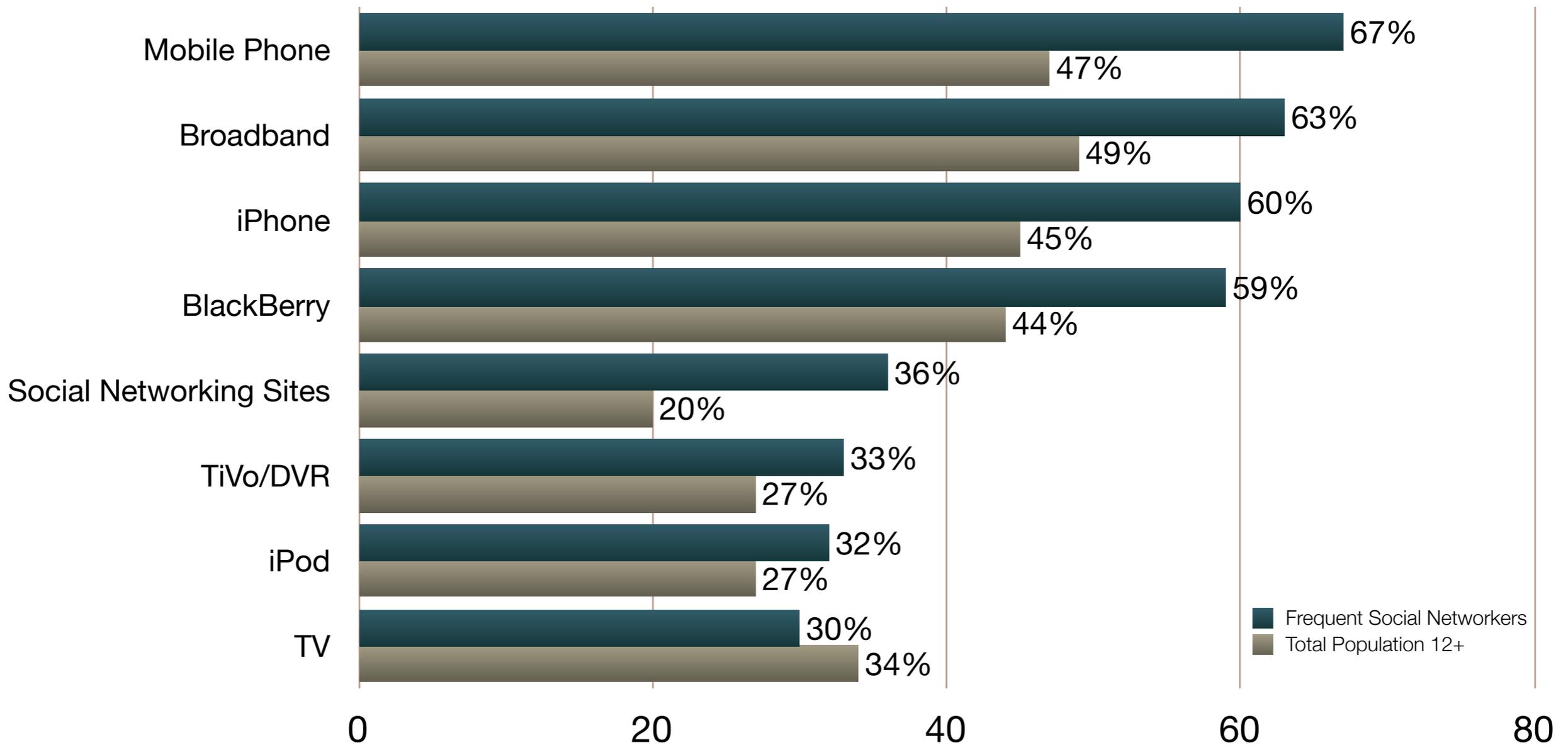


*Base: Use Social Networking Sites/Services
"Several Times Per Day" and Own Mobile Phone*



The Mobile Phone Has Had The Biggest Impact On The Lives Of Frequent Social Networkers

% Who own/use each listed device/service and say it has had a 'Big Impact' (5 on a scale of 1-5) on their lives



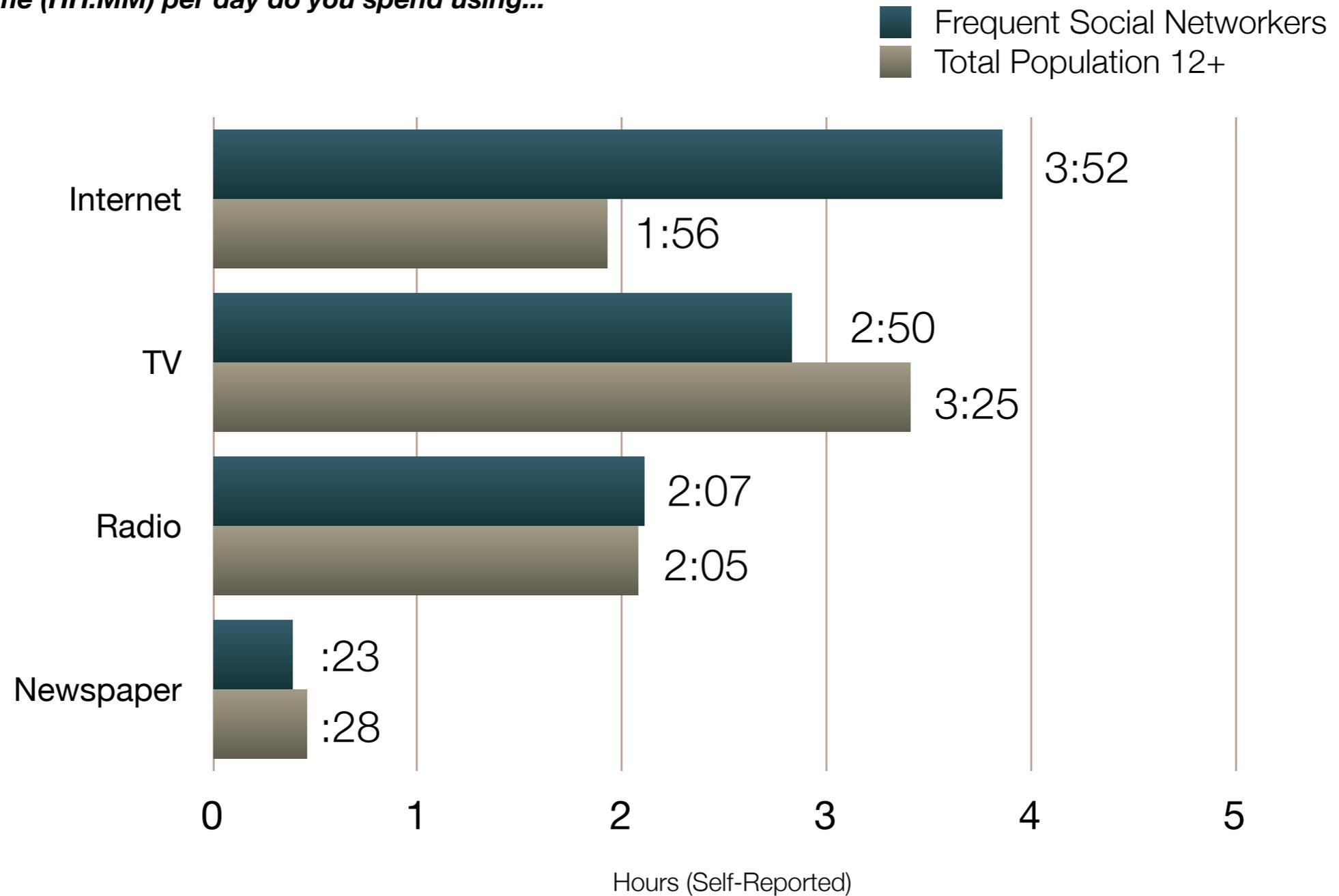


Media Habits



Frequent Social Networkers Watch Less TV

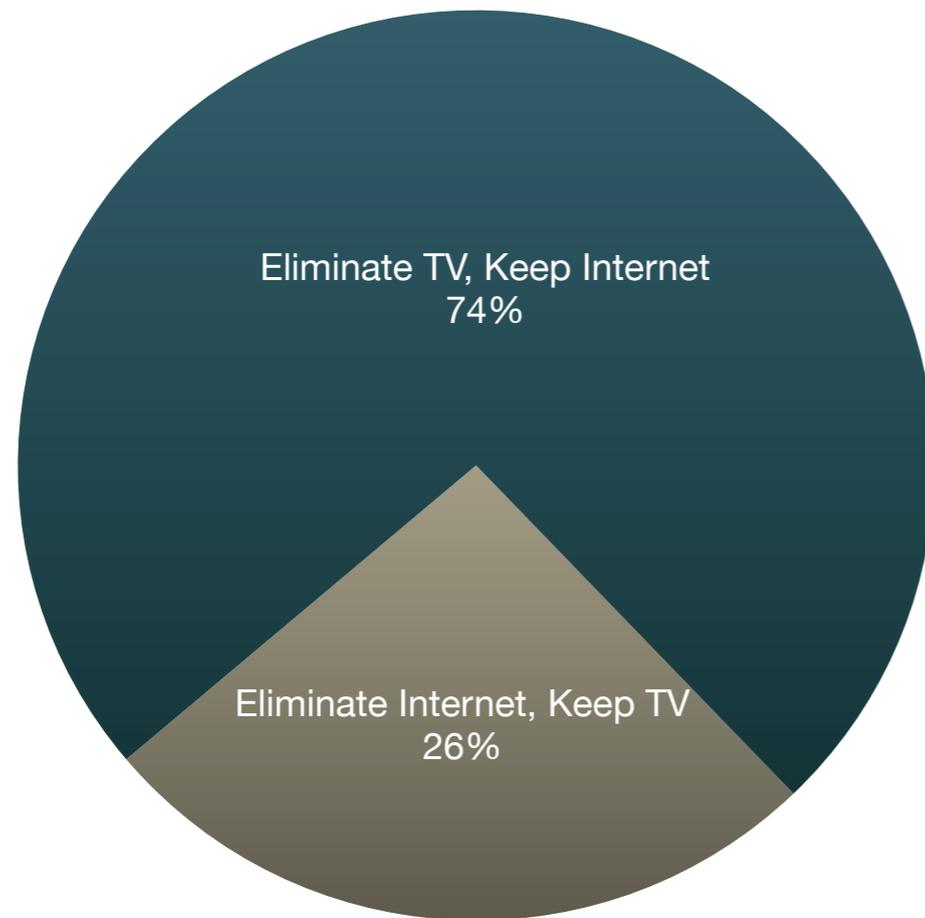
"How much time (HH:MM) per day do you spend using..."



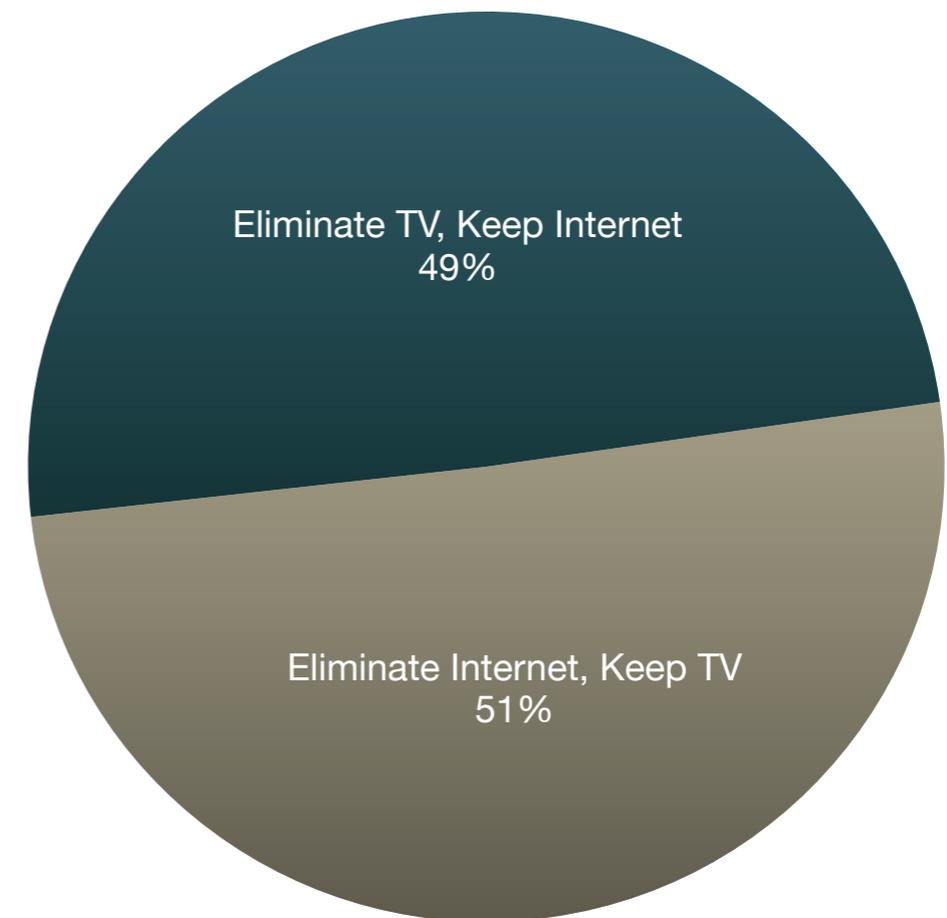
Internet More Important Than TV to Vast Majority of Frequent Social Networkers

“Suppose you could never watch television again OR you could never access the Internet again. Which would you be more willing to eliminate from your life?”

Frequent Social Networkers

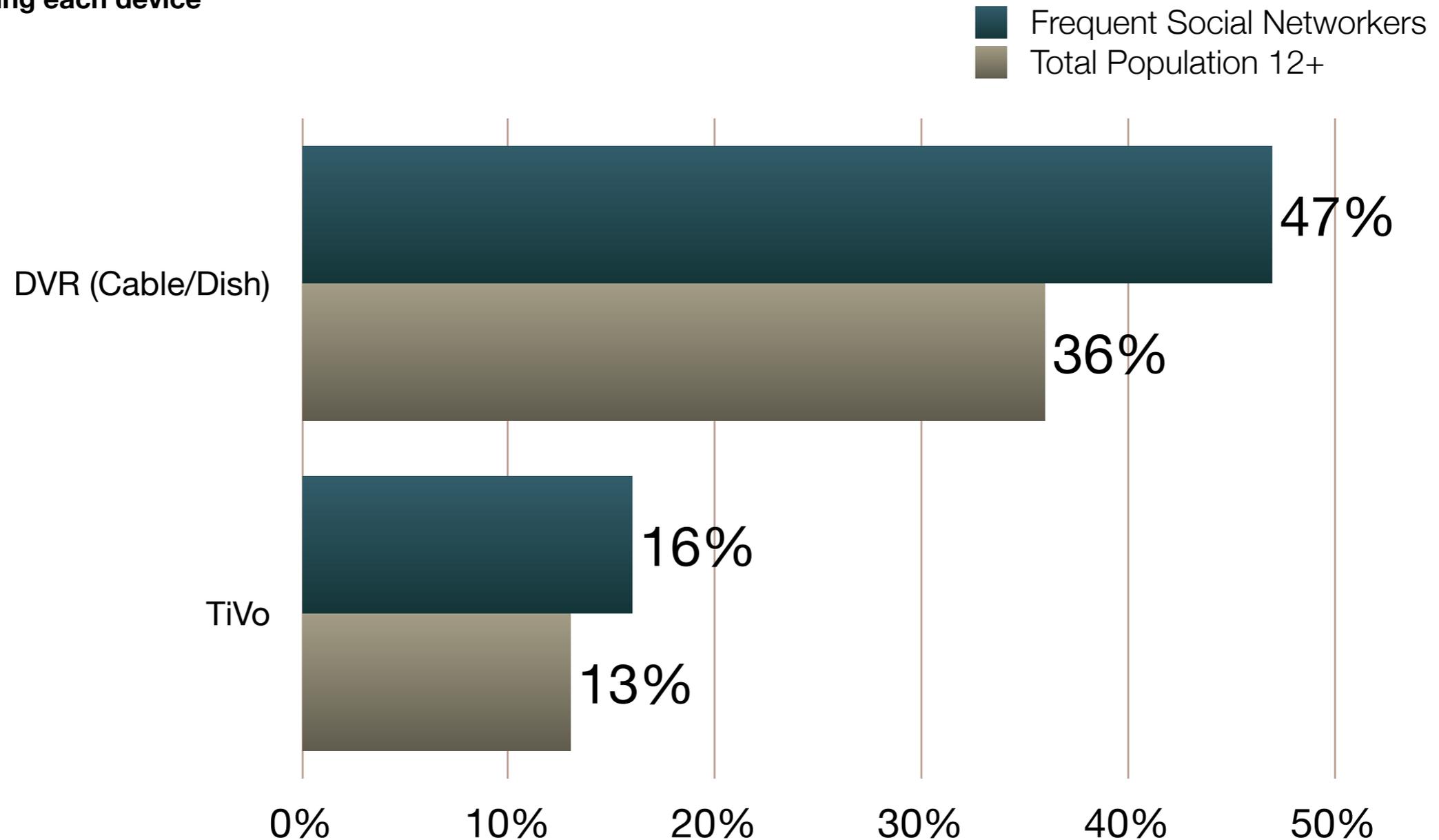


Total Population 12+



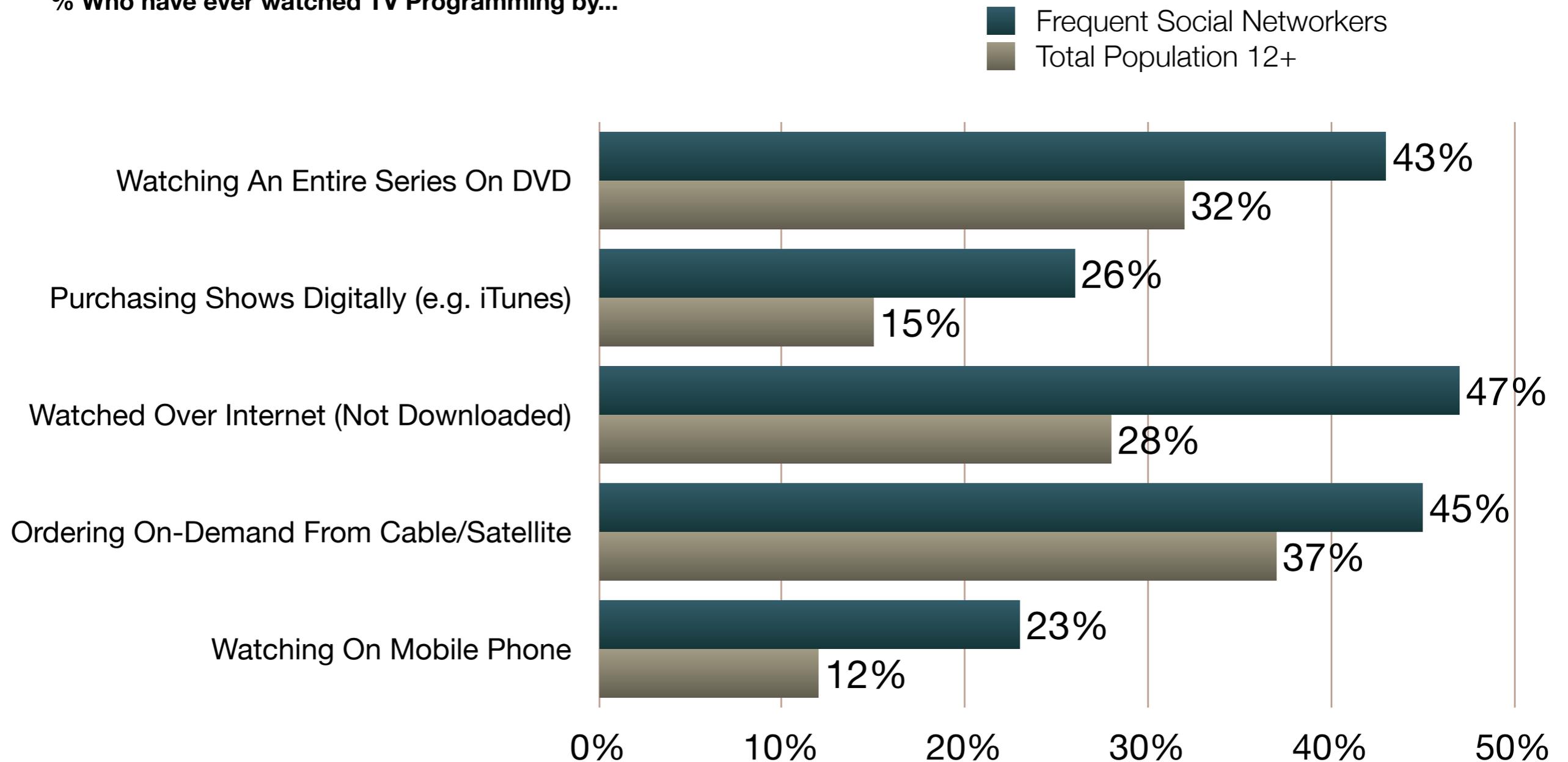
Frequent Social Networkers More Likely To Own “Timeshifting” Devices For Television

% Owning each device



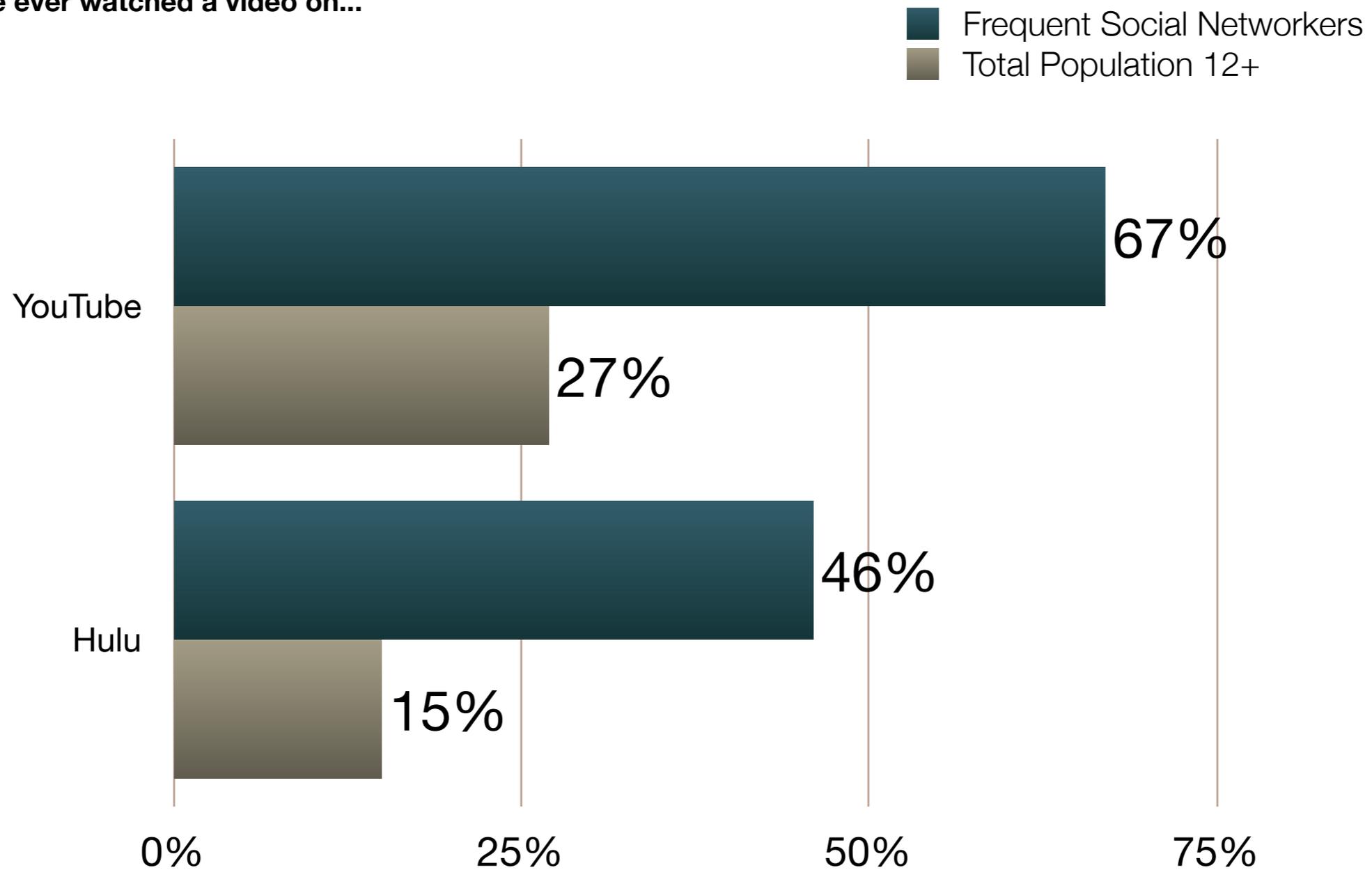
Frequent Social Networkers More Likely To View TV Programming Through Non-Traditional Means

% Who have ever watched TV Programming by...



Frequent Social Networkers Active Consumers Of Online Video

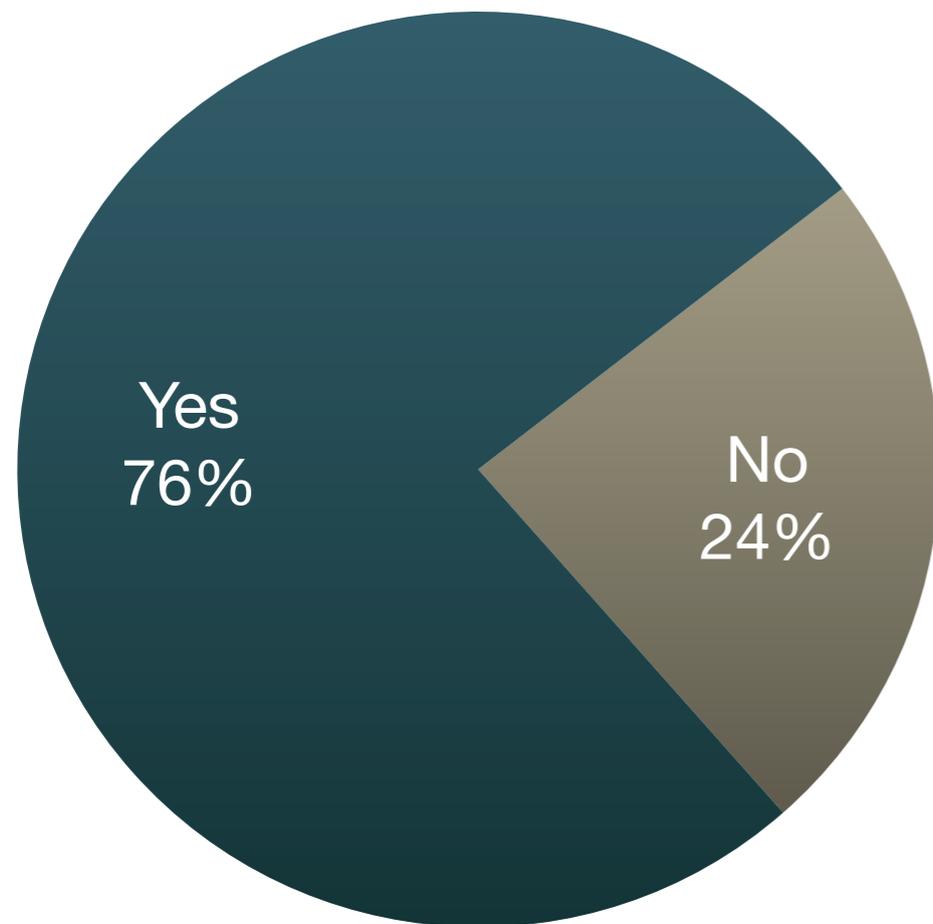
% Who have ever watched a video on...



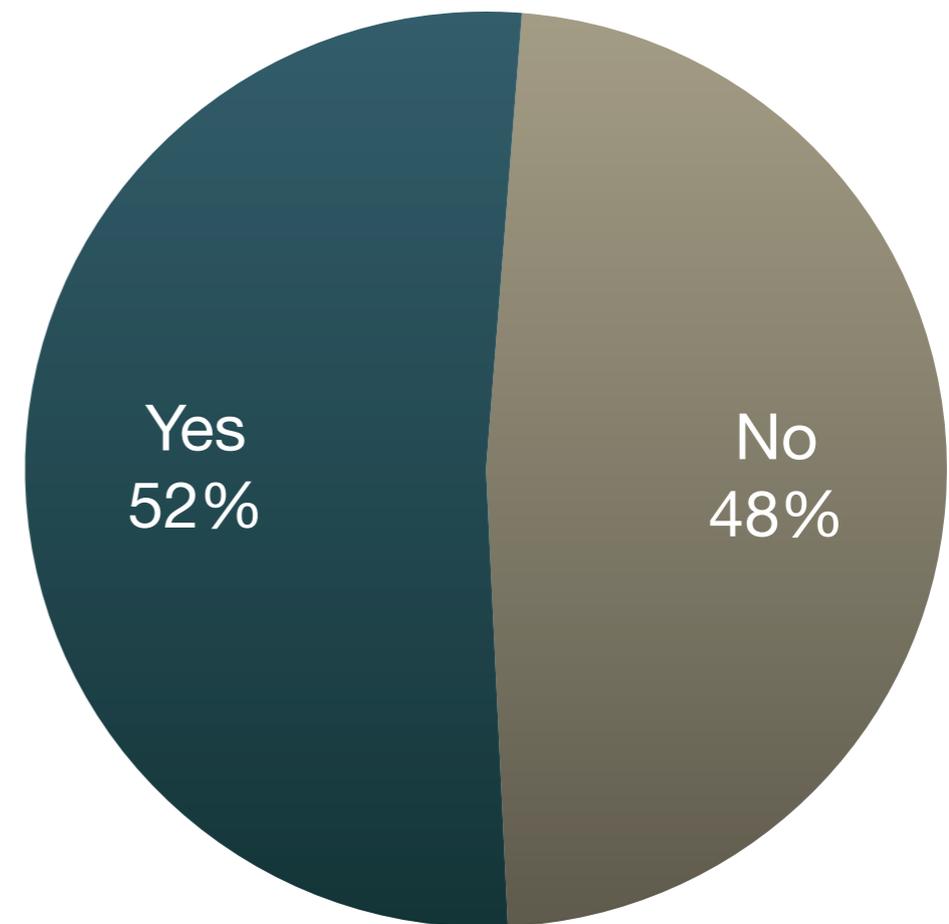
Three Out of Four Frequent Social Networkers Have Listened to Online Radio

% who have ever listened to online radio

Frequent Social Networkers

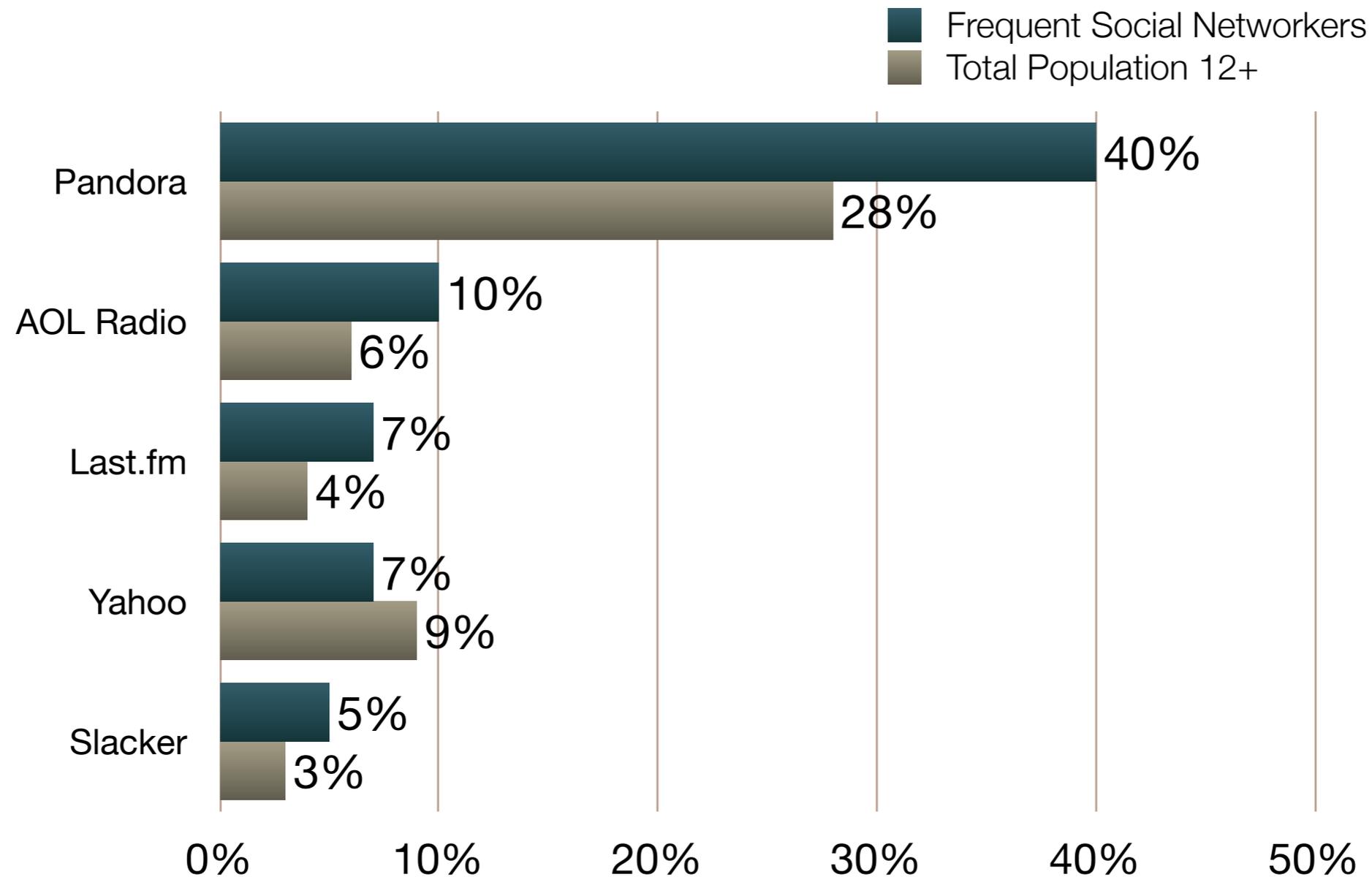


Total Population 12+



Frequent Social Networkers Most Likely to Recall 'Pandora' Among Internet-Only Audio Providers

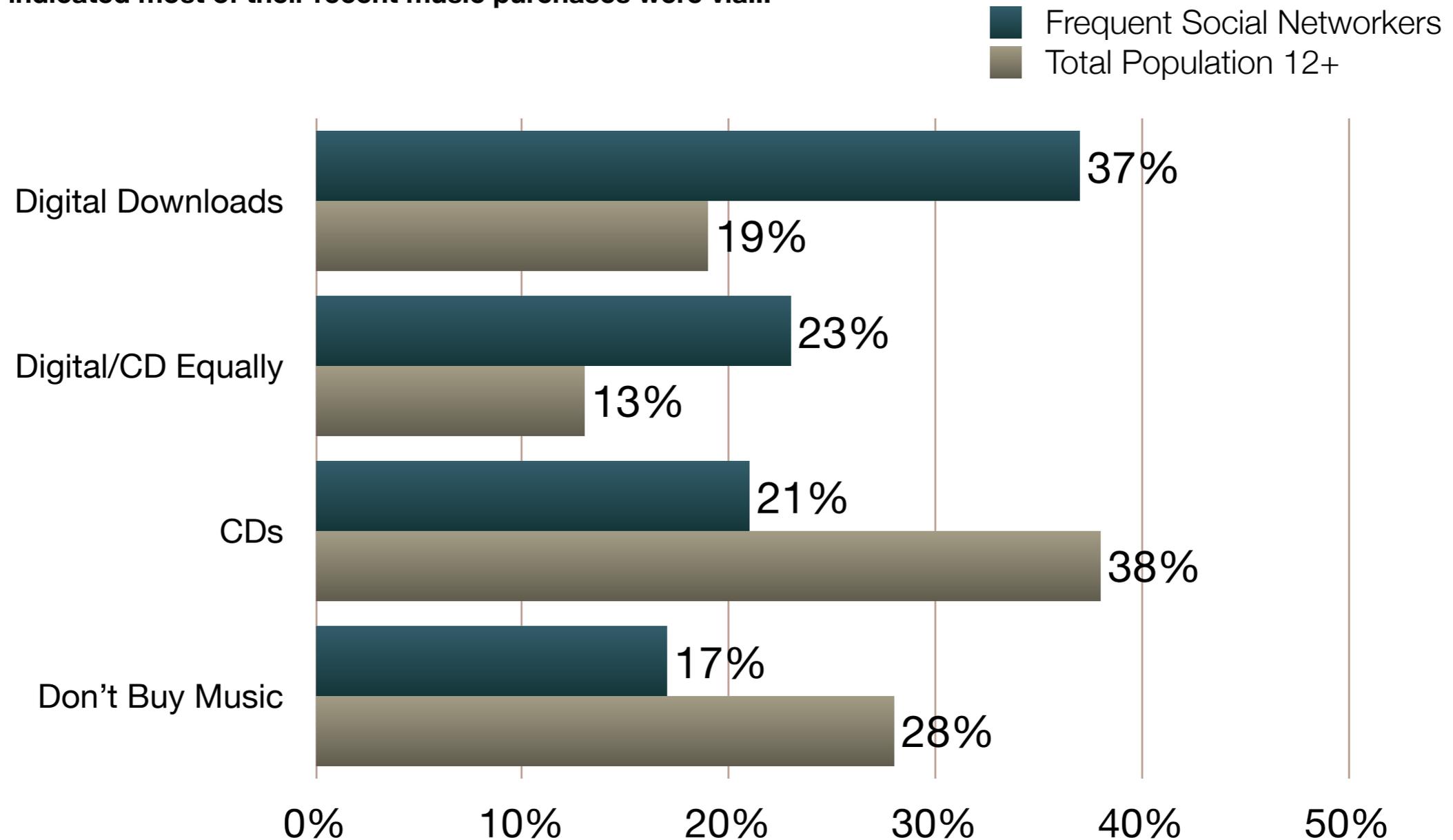
"Please name all the companies you can think of that provide Internet-only audio"



Base: Have Ever Listened to Internet-Only Audio

Frequent Social Networkers Embrace Digital Music Purchases

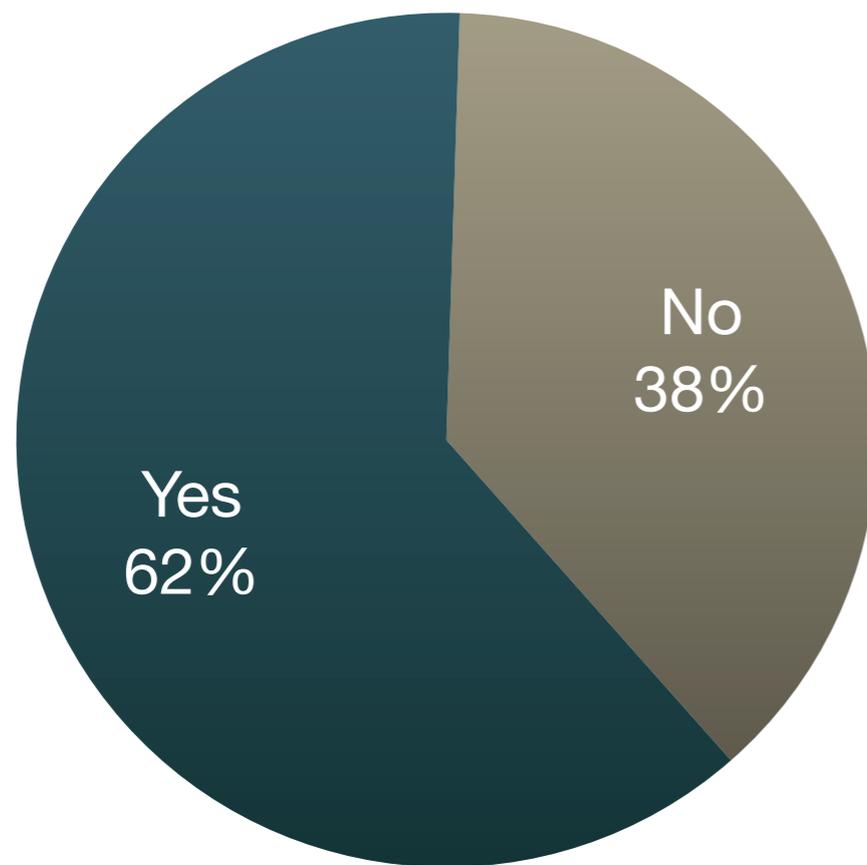
% Who indicated most of their recent music purchases were via...



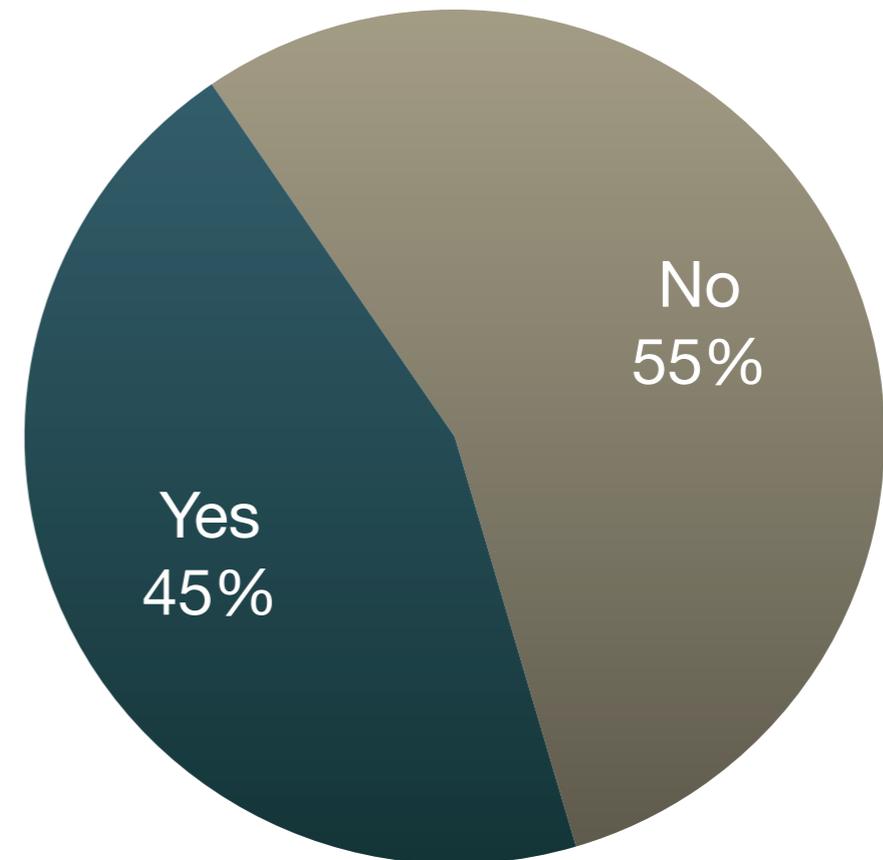
Six In Ten Frequent Social Networkers Familiar With Podcasting

“Are you familiar with the term “Podcasting?”

Frequent Social Networkers



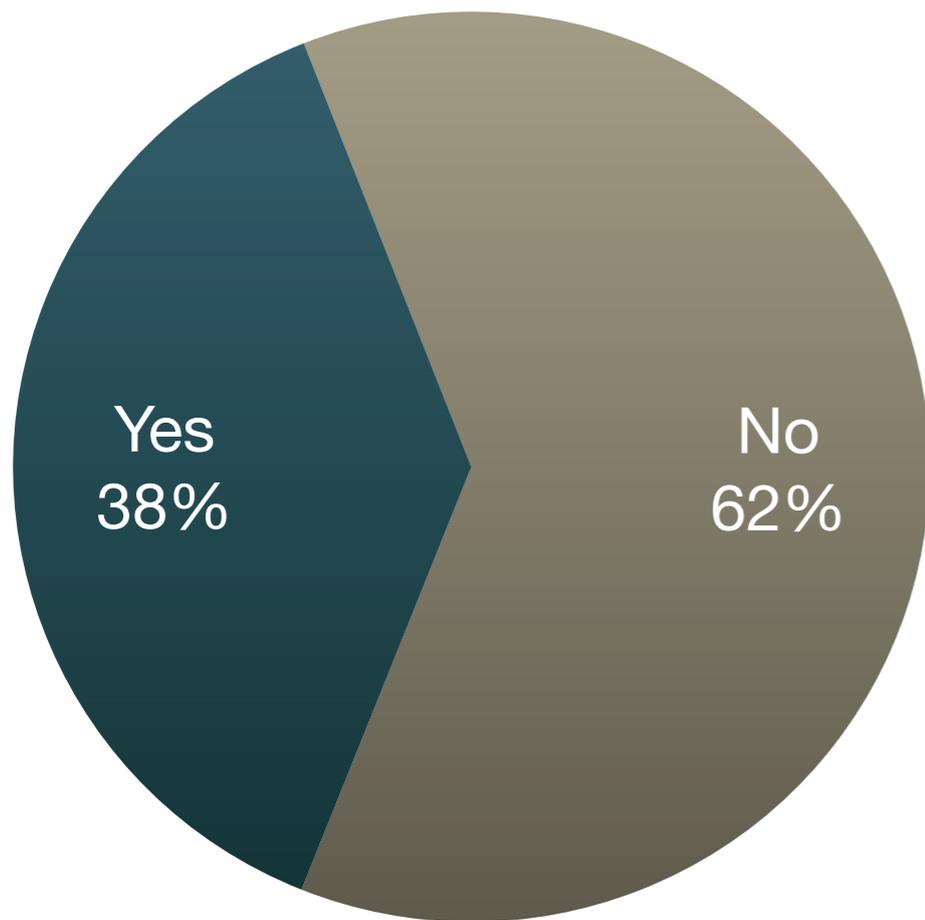
Total Population 12+



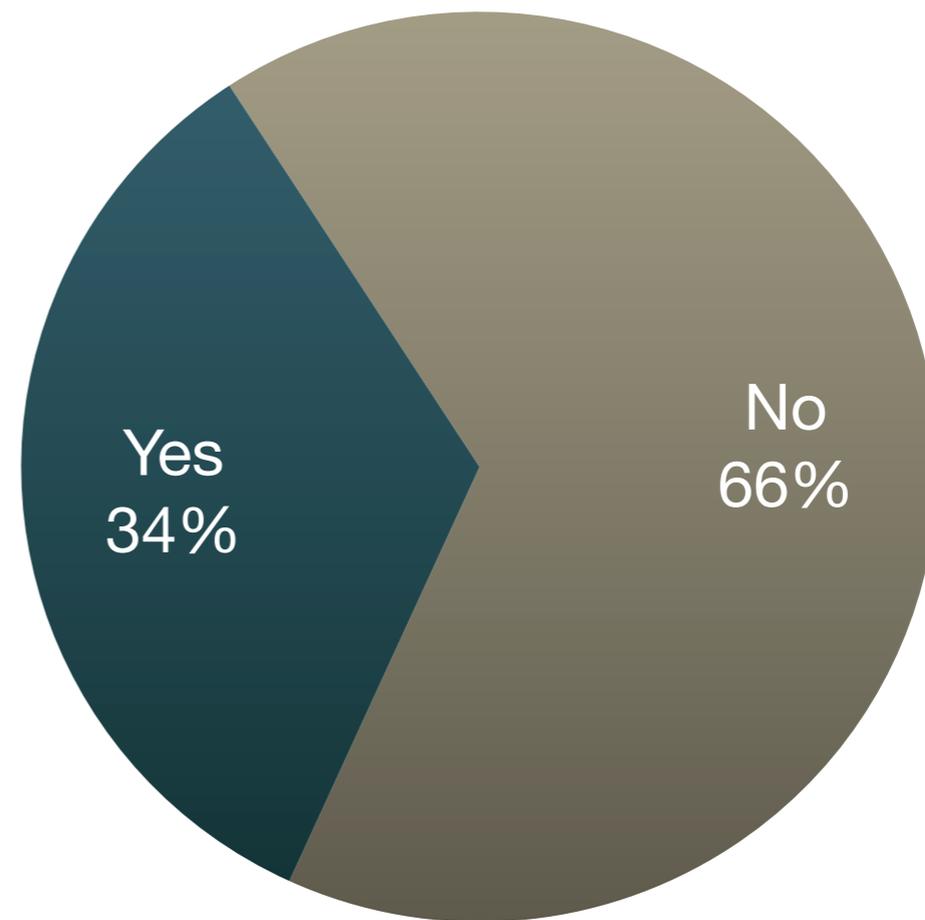
Audio And Video Podcasting Usage

% Who have ever listened to/watched an Audio/Video Podcast

Audio Podcast



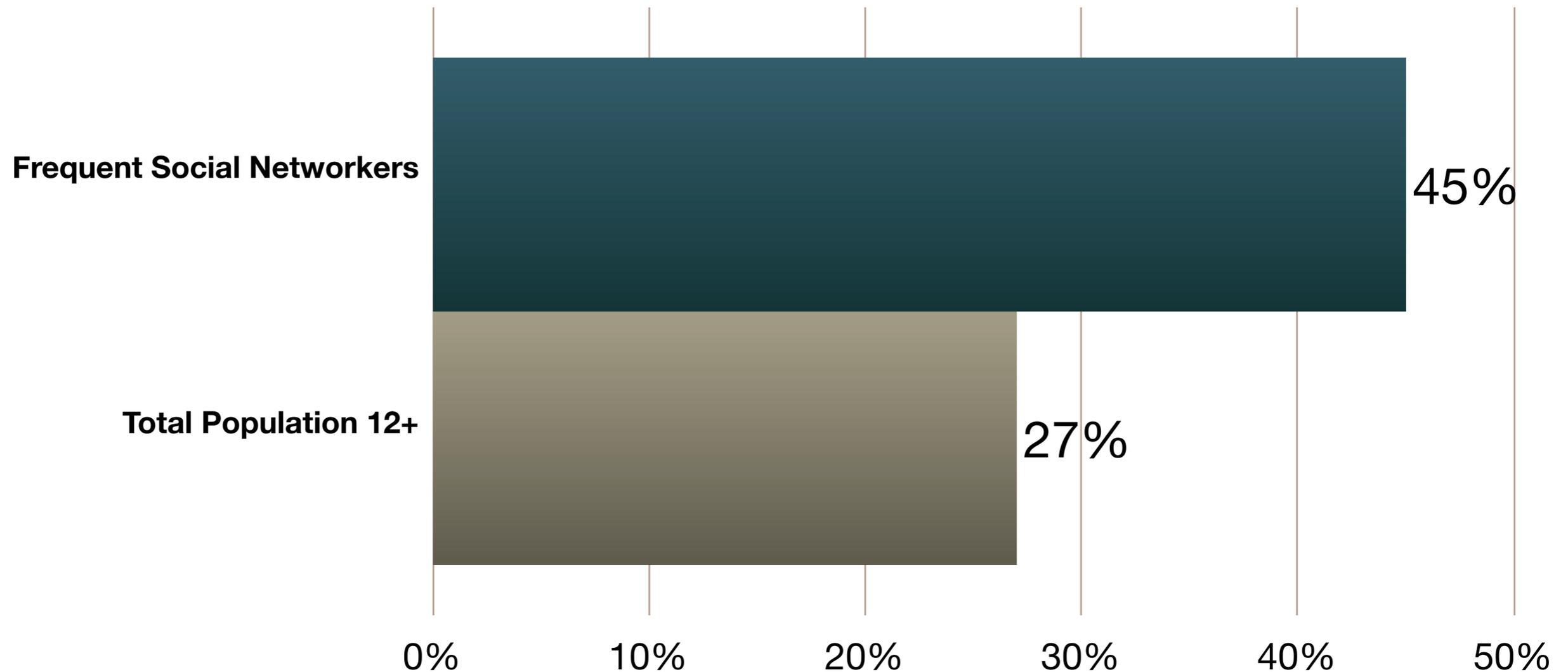
Video Podcast



Base: Use Social Networking Sites/Services
"Several Times Per Day"

Frequent Social Networkers More Likely To Have Watched Or Listened To A Podcast

% Who have ever consumed either a video or audio podcast





Implications



1. With both usage of social networks *and* the frequency of that usage increasing dramatically, we are truly witnessing a sea change in how mainstream consumers communicate.

2. Americans who check social networking sites several times per day are much more likely to be young, and female.

3. Mobile access to social media is almost certainly a significant contributor to frequency of usage.

4. Frequent social networkers are also more likely to update their status on those networks - i.e., create content online - which has implications for word-of-mouth marketing *and* search.

5. Not only are frequent social networkers posting more status updates, they are also more likely to follow brands/companies than the average social media user - which makes identifying and appealing to those with the “social habit” crucial for brands.

6. The data for frequent social networkers' usage of podcasts, online video and online audio supports the assumption that a significant amount of content is being consumed on-demand, potentially at the point where such content is shared.

7. Americans with “the social habit” are watching significantly less traditional television, but potentially consuming (and sharing) more “video” through alternative means.

8. Pandora is already the dominant online audio brand with frequent social networkers. These consumers' propensity for posting status updates and other content, combined with Pandora's recent moves to integrate with Facebook, will likely position Pandora as the dominant music discovery brand online.

Edison Research - The Social Media Research Authority

- The effectiveness of social media must be measured both online AND offline to truly track how the social presence of a brand influences a consumer's decision-making process.
- Social Media Monitoring alone can provide metrics like share of conversation, and possibly even online sentiment, but offline measures should also be incorporated to gauge the linkage between sentiment and to determine the actual value social media efforts have for brands.
- Edison's custom social media research process provides a true measure of the return on social media engagement - online, and at the cash register.
- Visit www.edisonresearch.com/social_media_research.php for more!





Thank you.

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