



Social Media Journey

SixthSense™

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Introduction

The social media landscape is changing rapidly, and presents both opportunities and challenges to marketers. Rather than ‘talking at’ customers, companies have had to learn to listen to, and to respond to and engage with, customers in ways that are appropriate to their needs.

This report looks at the social media journey from the point of view of the customer, including an assessment of the social media landscape, how users view the key various players and how social media sites are likely to develop in future.

Methodology

YouGov SixthSense commissioned a survey among YouGov’s online panel, conducted between 3 and 7 November 2011, drawing on a nationally representative sample of 2,080 UK adults aged 16 and over and a further 798 UK adults aged 16 and over who use Facebook, Twitter and/or LinkedIn.

A second survey, among 959 users of Facebook, Twitter and/or LinkedIn, was conducted between 15 and 16 November 2011.

Readers should bear in mind that because both surveys were conducted online, incidence of social network usage is not representative of the population as a whole, but rather of Internet users only.

Some of the questions in the survey were open-ended, allowing participants to respond in their own words. Quotes from these responses have been included in the text, where relevant.

Report Summary

Facebook: package deals for the masses

- Very widely used (74% of respondents).
- Range of age groups – but younger users still dominate (two-thirds of over-55s, nine out of ten 16-24s).
- One in five users have been registered for at least four years, and only one in ten have registered within the last year.
- It is the most frequently accessed site, with two-thirds of registered users doing so at least on a daily basis.
- Top attributes among users: popular, sociable, youthful.
- Average number of friends: 134.
- Most Facebook users are proactive in their use of the site, with nearly two-thirds having commented on other users' updates, and just over half having written updates of their own, in the past month.
- Women are more open than men to advertising and marketing-related activity on Facebook. 16% of all Facebook users – and 17% of female users – have become a fan of a brand's page during the last month.
- When asked what they liked best about Facebook, users were most enthusiastic about its ability to enable them to keep in touch with friends and relatives.
- Its huge user base also means it helps them to regain contact with people from their past.
- Concerns about privacy (exacerbated by recent changes to the site) loomed large among dislikes about Facebook.
- Facebook has been firmly in the mainstream for many years now, and its challenge is to avoid becoming stale and boring – while at the same time appeasing the many users who dislike any changes to the site.

Twitter: niche destination for independent travellers

- 27% of respondents have a Twitter account.
- Users tend to be under 45.
- Male users slightly outnumber females (30% of men versus 25% of women).
- More likely than any other site to be accessed by smartphone (38% of users do so).
- Has the highest proportion of new users overall, with more than four in ten having registered within the past year.
- Nearly half of Twitter users check it out at least daily – and these are among the most enthusiastic of all social media users.
- Frequent users are equally likely to be male as female, but are found most often among the under-35s, 53% of whom are daily users.
- However, one in four registered users access the site very infrequently (less than once in two weeks).
- Top attributes among users: popular, sociable, unique.
- Average number of followers: 67; average number of people followed: 89.
- Although fewer than half of all Twitter users have tweeted during the past month, more than seven in ten of those who access it daily have done so.

- Six in ten frequent users have re-tweeted, around half have responded to someone else's tweet, and four in ten have tweeted at least one link.
- They are more likely than users of other social networking sites to look at/follow brands on the site: one in five follow food and drink brands, and 14% follow travel companies.
- They are also more proactive generally, being more likely than others to take action (e.g. visiting a website, attending an event) as a result of reading something on a social networking site.
- Compared with users of other social networking sites, they are the only group in which more people disagree than agree that they are starting to get bored with social networking.
- Major advantages of Twitter for its users include:
 - Brevity
 - Ability to connect with media, and with a wide range of people
 - Perceived privacy
 - Good design.
- 'Too much information' is a major criticism of Twitter – especially for those who follow a large number of people.
- For the future, it may benefit Twitter to nurture its frequent users – who are among the most proactive users of social media – rather than attempting to become more mainstream and risking losing its uniqueness in the process.
- Making the site more user-friendly – and in particular allowing tweets to be organised more effectively – could help deal with the information overload problem.

LinkedIn: the business trip

- Used by 17% of respondents.
- More male than female users.
- Dominant age group is between 25 and 54.
- 17% of users have registered within the last six months.
- Top attributes among users: trustworthy, popular.
- Average number of contacts: 54.
- Men are more assiduous LinkedIn networkers than women.
- More than half of male users (compared with 36% of women) have approached or responded to at least one new connection in the last month.
- The perceived seriousness, and professionalism, of LinkedIn, was a clear plus point for many users.
- Its networking and job-finding capabilities were also praised.
- Marketing emails – and particularly unwanted approaches from recruitment agencies – were seen as a problem by many LinkedIn users.
- For some, this extended to the way contacts and notifications were managed in general.
- There were also criticisms of the layout of the site itself, and of the mobile app.
- For the future, LinkedIn could look at ways of helping its female users to get more out of the site.
- It has a high trustworthiness rating at present – but this may change if users continue to become irritated by unfiltered approaches from marketers and recruitment agencies.

Friends Reunited: nostalgia trip

- The same proportion of users as Twitter – but with a noticeably older age profile.
- Four in ten over-55s – but only one in five 25-34 year-olds, and just 1% of 16-24 year-olds, have an account.
- Six in ten users registered four or more years ago; only 1% in the last year.
- Very few registered users access the site on a frequent basis – and eight in ten do so less than once every two weeks.
- Top attributes among users: old fashioned, sociable.
- Its future might lie in linking up with its sister genealogy sites, encouraging older users to connect with their more recent past by contacting friends and relatives who have been part of their story.

Google+: trips for techies

- Has the same proportion of users as LinkedIn.
- Users tend to be Early Adopters, with a predominance of males.
- The gender split is most noticeable among younger users of Google+, with 27% of males, but only 13% of females, aged 16-24 saying they are registered users.
- Only around one in five registered users access it daily, while a third do so less than once a fortnight.
- Top attributes among users: sociable, popular (but one in five users don't yet know what its attributes are).
- The site's mainly technology-focused usership may broaden as it continues to make an effort to increase its appeal to women.

MySpace: girly weekends

- MySpace has been losing users at a rapid rate during 2011 – just 7% of research participants have an account.
- Younger women are by far the biggest users of MySpace (17% of women aged 16-24, compared with just 5% of men in the same age group).
- 44% have been registered as users for at least four years.
- As with Friends Reunited, many of the users are dormant, with eight in ten accessing the site less often than once a fortnight.
- Top attributes among users: old fashioned, sociable.
- The site has always focused on music, and now claims to be an 'entertainment destination' rather than a social networking site, and this is where its future lies – unless, as widely predicted, it disappears altogether.

Future directions for social media

- There is a risk that the ubiquity of social media might lead to boredom.
- Rather more participants agreed (36%) than disagreed (28%) that they are 'getting bored with social networking websites'.

- The exception to this is Twitter users, who tend not to feel bored by social media.
- There is an even balance between the number of social networking site users who say they are using them less than they were a year ago (22%) and those who are using them more (25%).
- Those aged 45-54 buck this trend, being almost twice as likely to say they are using them more than to be using them less.
- However, there was no evidence of mass desertion from social media.
- Just over one in five had stopped using at least one social media service during the past year – but no single service was mentioned by more than 6% of respondents.
- Losing interest was by far the main reason for stopping using any service (mentioned by seven in ten) – with just 17% mentioning privacy worries.
- There was broad agreement that social media has become highly integrated with many aspects of daily life – and that this was likely to continue.
- The danger of this is that it becomes intrusive, alienating some users.
- There are also concerns about privacy, and about the commercialisation of social media.
- A common reaction among research participants to the ubiquity of social media was an intention to become more selective about their own usage.
- It is likely that the social media marketplace – like the travel marketplace – would contract in the near future, leaving one or two big players, plus niche operators catering to specific markets.