

The 2011 Social Media Consumer Trend and Benchmark Report



2011 Social Media Consumer Report

Six degrees of separation...or less?

In the early 20th century when Hungarian author Frigyes Karinthy first set forth the concept that any two individuals on Earth could be connected through at most five acquaintances, there were a mere 1.5 billion people walking the planet. Despite the fact that there are over 6 billion terrestrial inhabitants today, the idea seems no less plausible. If anything, with the advent of social media and our increasingly digital connectedness, the number of introductions required to link any two souls may now be even fewer than in Karinthy's days.

But social media is doing so much more than connecting individuals; it also provides consumers with a personalized way to connect to companies, brands and media and vice versa, making it an undeniable, if often complex, marketing tool. This report provides readers with a benchmark of the current state of social media and identifies trends and opportunities that will help forward-thinking marketers navigate this still new and growing space in order to make better business decisions.

In this report, we will:

- Chart the growth of social media usage by age
- Trend time spent on and frequency of visits to top social media sites
- Identify those people with whom we communicate via our social networks
- Explore methods to increase traffic to your branded site through social media
- Benchmark receptivity to following brands and receptivity to recommendations
- Examine sites visited downstream from social media properties
- Discover the nation's social media capitals
- Share details on the merger of social and mobile

For more information about the American social media consumer, contact your Experian Marketing Services account manager or visit www.experian.com/marketingservices.

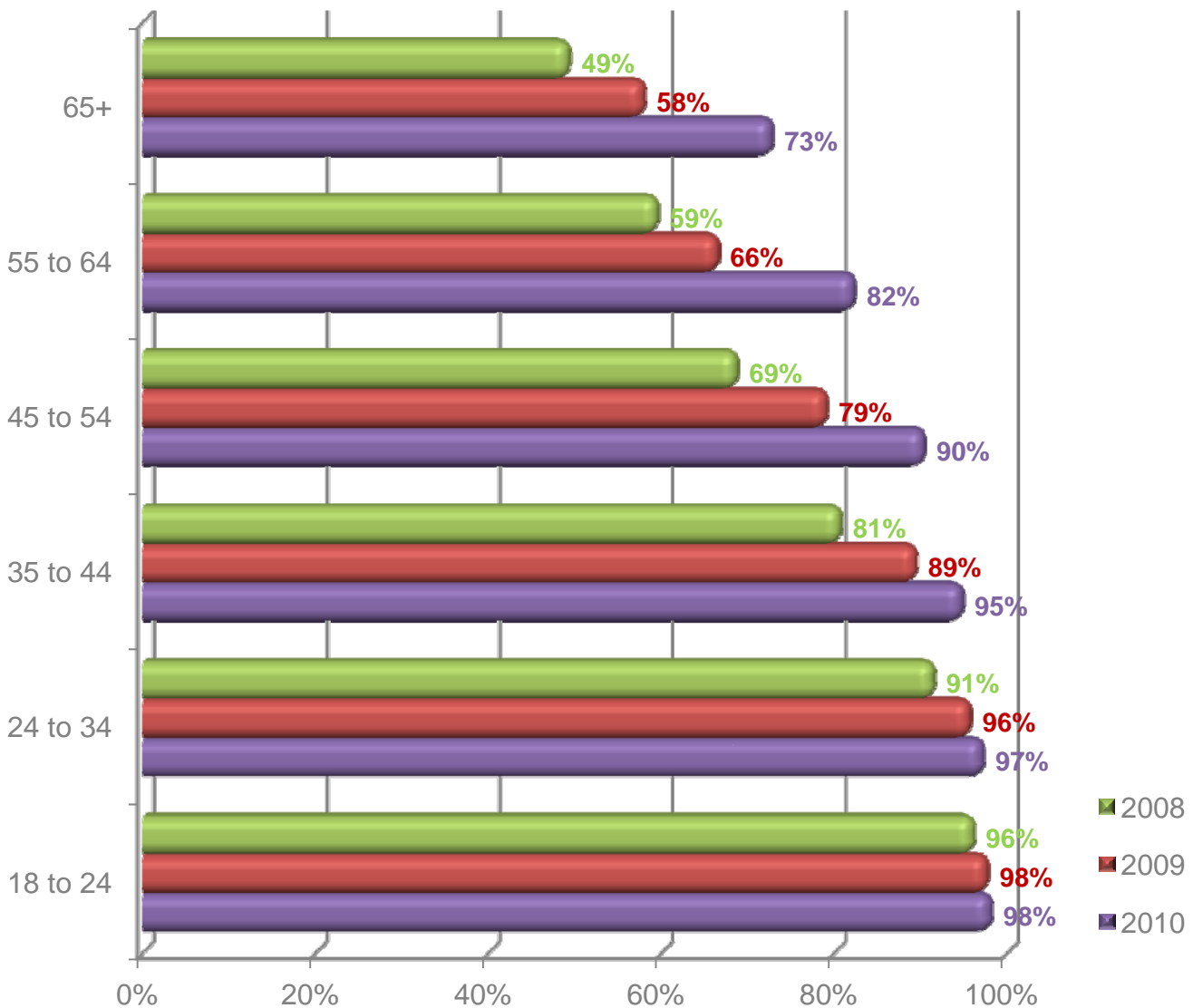
You can also add Experian Marketing Services to your social network by following @ExperianMkt on Twitter or liking Experian Marketing Services on Facebook.

Overview

129 million online Americans use social media

Fully 91% of online adults today, or 129 million individuals, access social media in a typical month. For this analysis, “social media” is defined as visiting social or professional networking sites, visiting photo or video sharing sites, visiting online forums or message boards or using social tagging or bookmarking at least once in the last 30 days. Social media usage is nearly ubiquitous among America’s young adults with little room for expansion, given that 98% of online 18-to 24 year-olds already use social media each month. The greatest growth sector is among older Americans. In fact, the share of those in the 65-plus cohort who use social media grew a relative 49 percent in the past two years alone. Today, nearly 3-in-4 online seniors use social media in a typical month as do 82% of those ages 55 to 64.

Percent of Online Adults Using Social Media* Monthly, by age



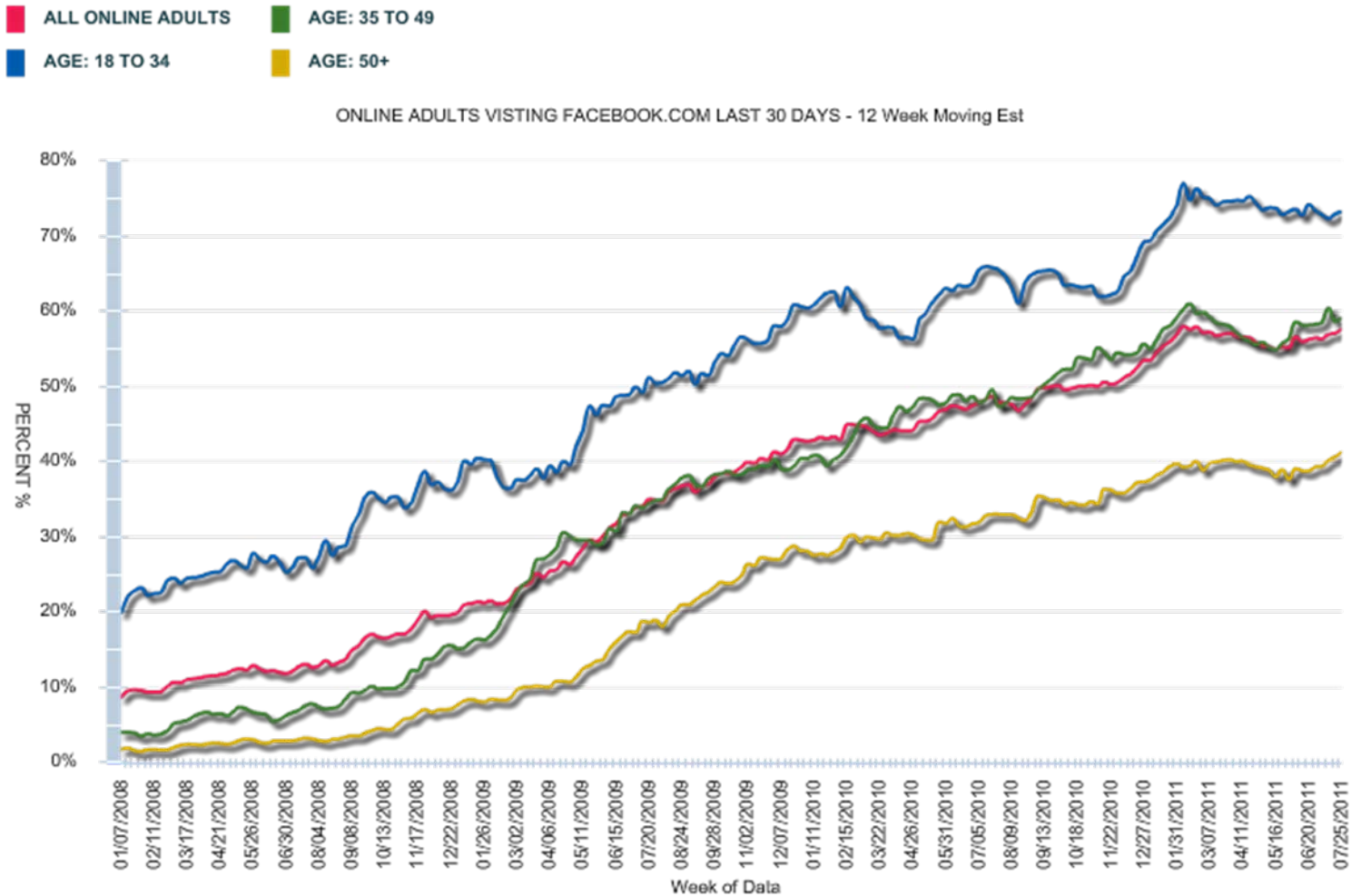
*Social media includes visiting photo and video sharing websites, social and professional networking sites, online forums or message boards and social tagging and bookmarking

The Dominance of Facebook

58% of all online adults visit Facebook.com monthly

It's impossible to discuss social media without acknowledging the dominance of Facebook. In fact, Experian Hitwise, an expert in digital marketing intelligence, reports that Facebook.com now accounts for over 65% of all visits to Social Networking and Forums-classified Websites. Weekly tracking data from Experian Simmons further shows that [despite a brief decline in monthly visitors from February to May of 2011](#), fully 58% of all U.S. online adults now visit Facebook.com at least once a month. Specifically, nearly three-quarters (73%) of online adults ages 18 to 34 visit the site monthly, the highest of any adult age group. A solid majority of adults ages 35 to 49 (59%) also make monthly visits to Facebook.com. While only 41% of online adults age 50-plus visit Facebook.com each month, that is still a 25 percent relative increase since a year ago when 33% of online adults age 50 and older visited the site.

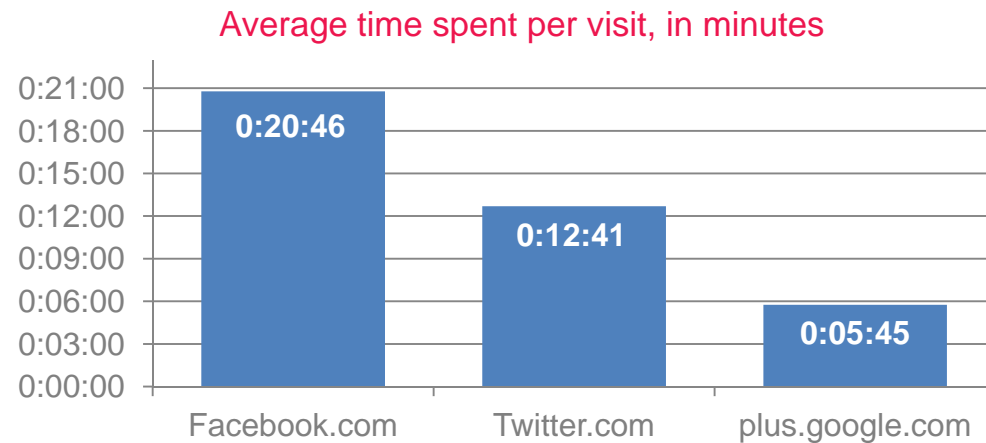
Percent of online adults visiting Facebook.com in the last 30 days



Time will tell

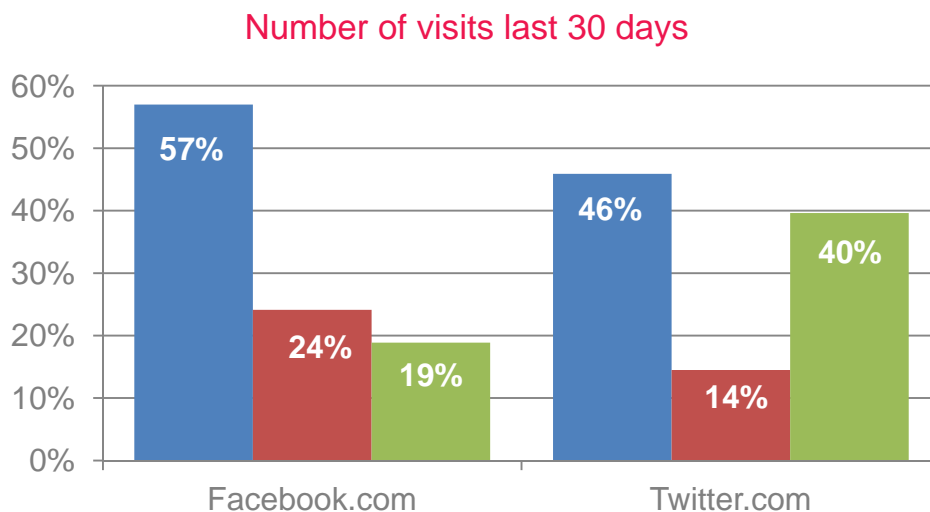
Average visit to Facebook.com lasts nearly five times longer than Google+ visits

Experian Hitwise reports that during the month of August 2011, Facebook users spent 20 minutes and 46 seconds each time they visited Facebook.com, compared with Twitter users who spent 12 minutes and 41 seconds during a typical visit to Twitter.com. Google+ users spend considerably less time on that site with the average visit to plus.google.com clocking in at 5 minutes and 45 seconds.



Source: Experian Hitwise, August 2011 (Note – Hitwise does not include mobile traffic)

When it comes to frequency of visits, Experian Simmons found that as of August 15, 2011, 57% of active Facebook users (those visiting the site at least once per month) report making more than 15 visits to the site during the last 30 days, up from 52% of active users who reported making as many monthly visits on August 16, 2010. By comparison, 46% of active Twitter users now make 16 or more monthly visits to Twitter.com, up from just 21% who made that many monthly visits last year. Interestingly, almost as many Twitter users (40%) report making fewer than five visits to the site per month.



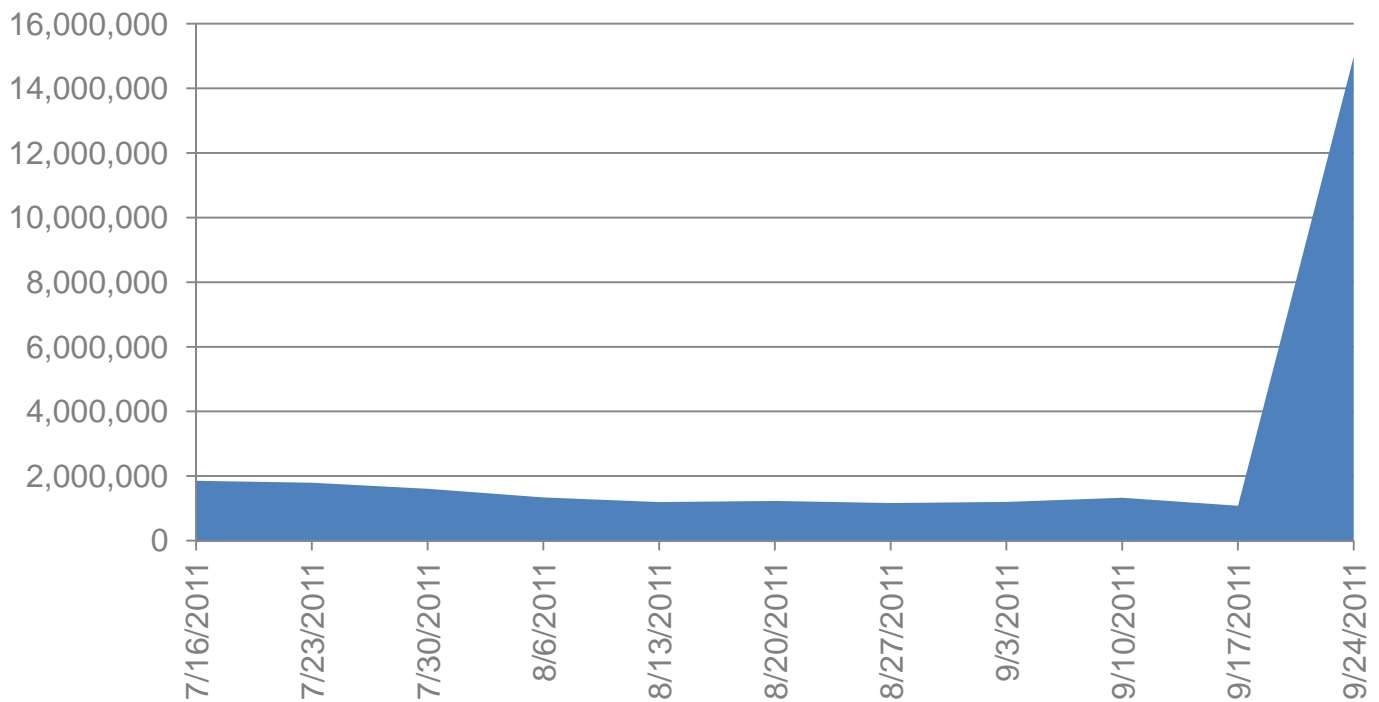
Source: Experian Simmons, August 15, 2011

Google+ opens the floodgates

Visits to Google+ soar after opening access to all

According to Experian Hitwise, Google+ emerged as the eighth largest Social Network and Forums-categorized Website the week ending September 24th, after the site went from "invitation-only" to "open access." The week prior, the site ranked just 54th in the category. Opening access clearly created a massive spike in market share of visits for the site, with a 1,269% growth from the week ending September 17th to the week of September 24th. In fact, Google+ received nearly 15 million total U.S. visits the week it opened to the public, up from just over 1 million visits the week prior. Coincidentally, the jump in visits to Google+ corresponded with the rollout of major changes in the news feed on rival Facebook.

Weekly visits to Google+



Source: Experian Hitwise

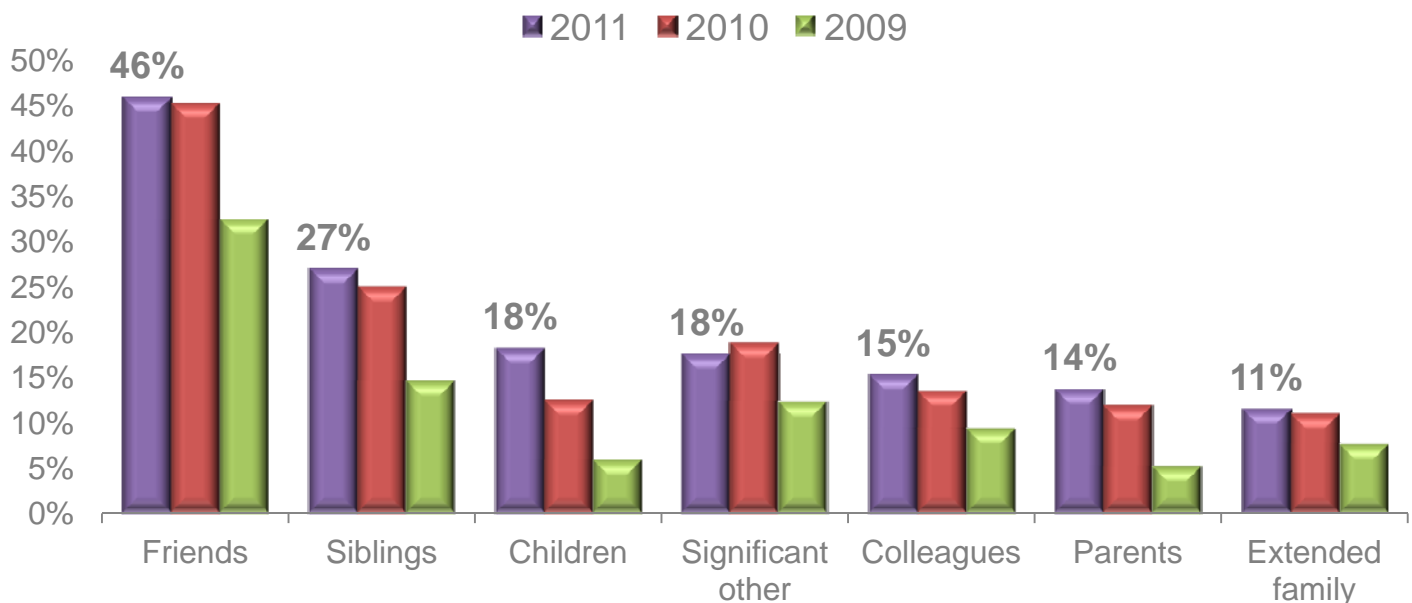
(Note – Hitwise does not include mobile traffic or traffic from the Google Notification Bar)

Social circles include more than friends

Parents and children increasingly connecting via social media

According to Facebook, the average Facebook user today has 130 friends. But social media sites are connecting consumers with more than their immediate circle of friends. Experian Simmons reports that while 46% of all online adults today say they use social media to communicate with their friends (up from 32% in 2009), 27% of those with a brother or sister say they communicate with their sibling via social media, up from 15% in 2009. Parents and children are also connecting with one another at an increasingly high rate. In 2009, only 6% of parents said they communicated with their children via social sites, but today fully 18% of parents communicate with their kids through social media. Likewise, 14% of adult children also say they communicate with their parents over social media today, up from just 5% in 2009.

Percent of all online adults who use social media to communicate with...



Tip: Considering incorporating a sharing feature on your site? Don't forget that many social media users are expanding their networks to include family and colleagues. Targeted messages geared for sharing with these new types of connections may resonate well.

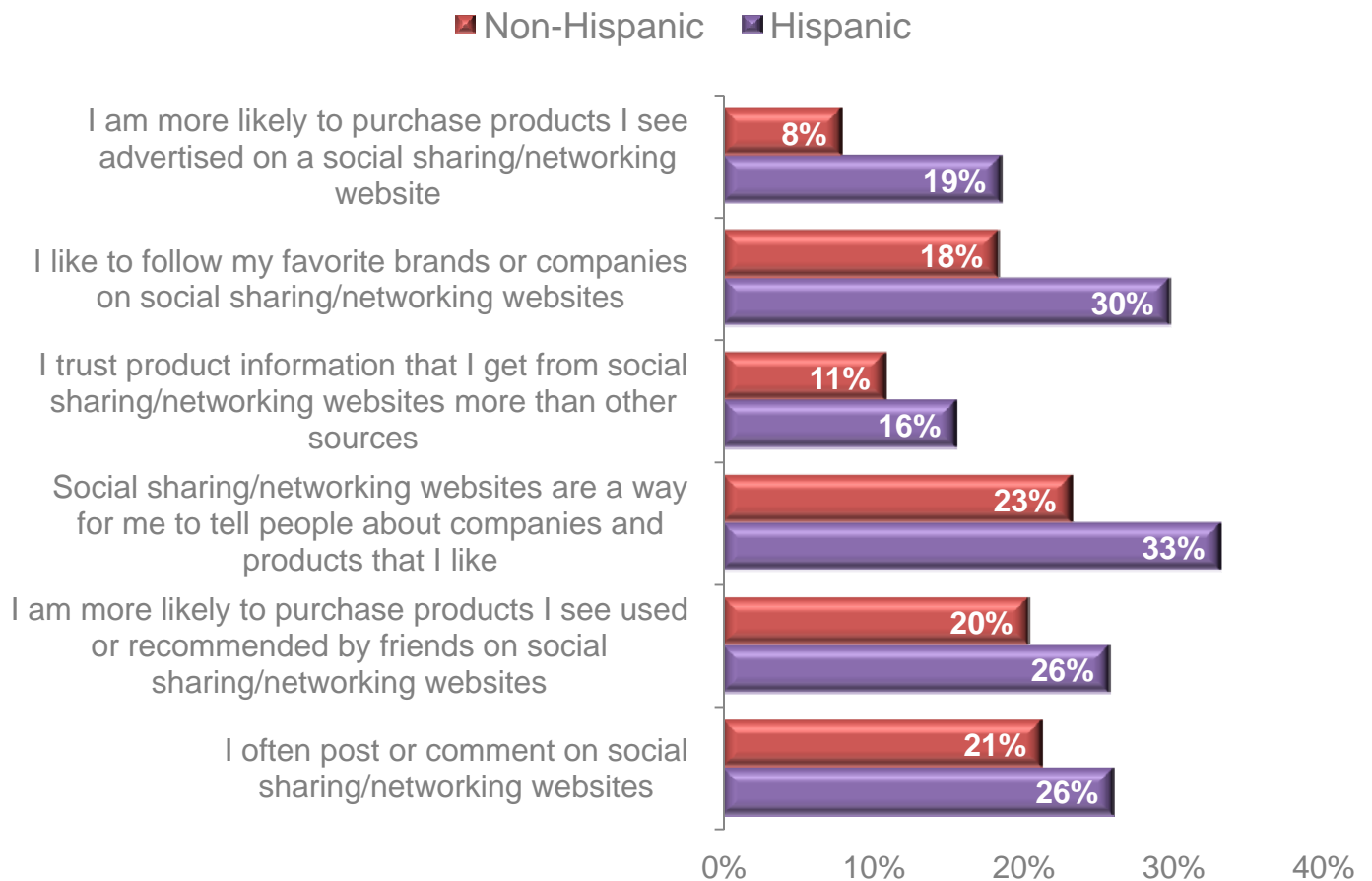
Source: Experian Simmons; Data collected in Winter of each year

Social presents brands prime opportunity to connect with Hispanics

Hispanic consumers use social to interact with brands, reviews, recommendations

Notably more so than their non-Hispanic counterparts, Hispanic users of social sites use properties like Facebook, Twitter and others as a way to connect with their favorite brands and learn about other products and services. Experian Simmons reports that nearly a third of Hispanic consumers who use social media today (30%) say they follow their favorite brands and companies on social sharing sites. By comparison, 18% of non-Hispanic users of social media say they follow brands. Moreover, 19% of Hispanic adult users of social sharing sites say they are more likely to buy products advertised on social sharing sites compared with 8% of non-Hispanics who say the same.

Percent of adults who agree with statements, by ethnicity*



Tip: Make sure your social presence is respectful and representative of the Hispanic culture and language. Many Hispanics, even those who use English predominantly, have a greater respect for companies that advertise in Spanish.

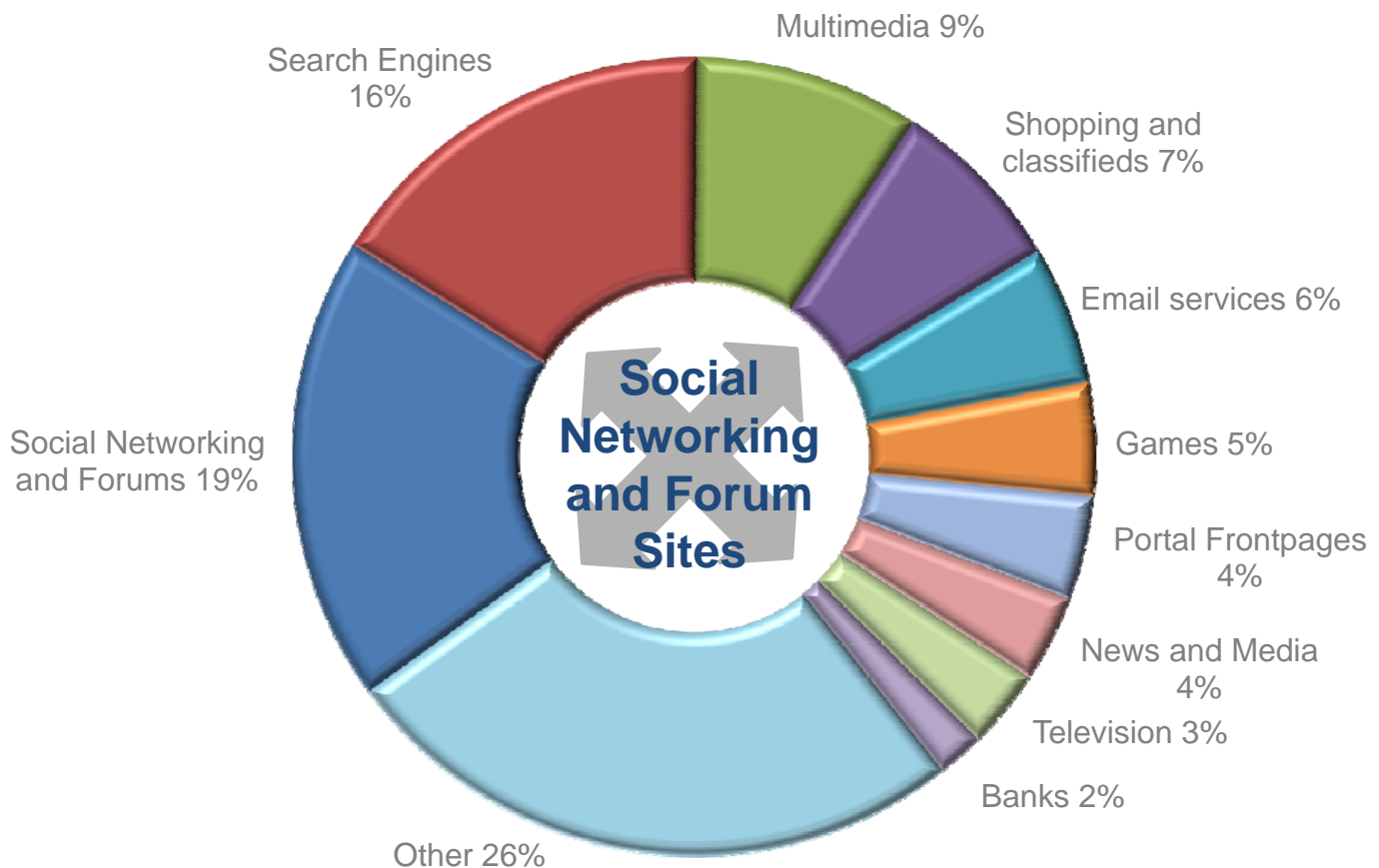
*Base: adults who access social sharing/networking sites
Source Experian Simmons

Post-social destinations

Downstream traffic trends among social networking site visitors

Have you ever found yourself in an endless web cycle that resembles something like this: Facebook, Twitter, YouTube, Email, repeat? If so, you're not alone. According to Experian Hitwise, 19% of all visits to any Social Networking and Forum-categorized Website are immediately followed by a visit to another social networking site. Most visitors, however, head elsewhere. In fact, 9% of social visits lead to a multimedia site like YouTube, Hulu, Vimeo, etc., and another 4% wind up on a news or media site such as CNN.com or AccuWeather.com. Hitwise reports that 16% of all visits to social networking sites are immediately followed by a visit to a search engine and 6% go to an email service page, where (potentially) the cycle starts all over again. Interestingly, 7% of all visits to social networking sites are immediately followed by a visit to a shopping or classified site.

Type of site visited after any Social Networking and Forum-categorized site



Source: Experian Hitwise, August 2011
(Note – Hitwise does not include mobile traffic)

Facebook delivers

Top downstream sites after visiting Facebook.com

Experian Hitwise reports that the top recipient of downstream traffic from Facebook is Google. Over 10% of all visits to Facebook (11.2%) now lead directly to Google.com and another 10.7% of visits lead to Google-owned YouTube. Combined, email service providers Yahoo!, Windows Live Mail, Gmail and AOL Mail account for nearly 7% of all post-Facebook visits. When it comes to Facebook's downstream traffic to Shopping and Classified-categorized sites, eBay is the top shopping destination, claiming 9.4% of Facebook's downstream shopping traffic. Social discount site Groupon, which allows customers to share deals directly with their Facebook friends, receives 0.8% of visits of Facebook's downstream shopping traffic.

Top Overall Websites Visited Immediately After Facebook.com

Website	Domain	% Share of Facebook's Downstream (all sites)
Google	www.google.com	11.2%
YouTube	www.youtube.com	10.7%
Yahoo! Mail	mail.yahoo.com	3.3%
Yahoo!	www.yahoo.com	3.2%
Windows Live Mail	mail.live.com	1.8%
Bing	www.bing.com	1.7%
Yahoo! Search	search.yahoo.com	1.7%
Twitter	www.twitter.com	1.2%
Gmail	www.gmail.com	1.0%
Aol Mail	mail.aol.com	0.8%

Top Shopping & Classifieds Websites Visited Immediately After Facebook.com

Website	Domain	% Share of Facebook's Downstream to Shopping & Classifieds*
eBay	www.ebay.com	9.4%
NetFlix.com	www.netflix.com	5.1%
Amazon.com	www.amazon.com	4.2%
Walmart	www.walmart.com	2.2%
Craig's List	www.craigslist.org	1.9%
Target	www.target.com	0.9%
Groupon	www.groupon.com	0.8%
Yahoo! Shopping	shopping.yahoo.com	0.8%
QVC.com	www.qvc.com	0.7%
Etsy	www.etsy.com	0.7%

*% Share of Facebook's downstream to Shopping & Classifieds-categorized Websites

Source: Experian Hitwise, August 2011

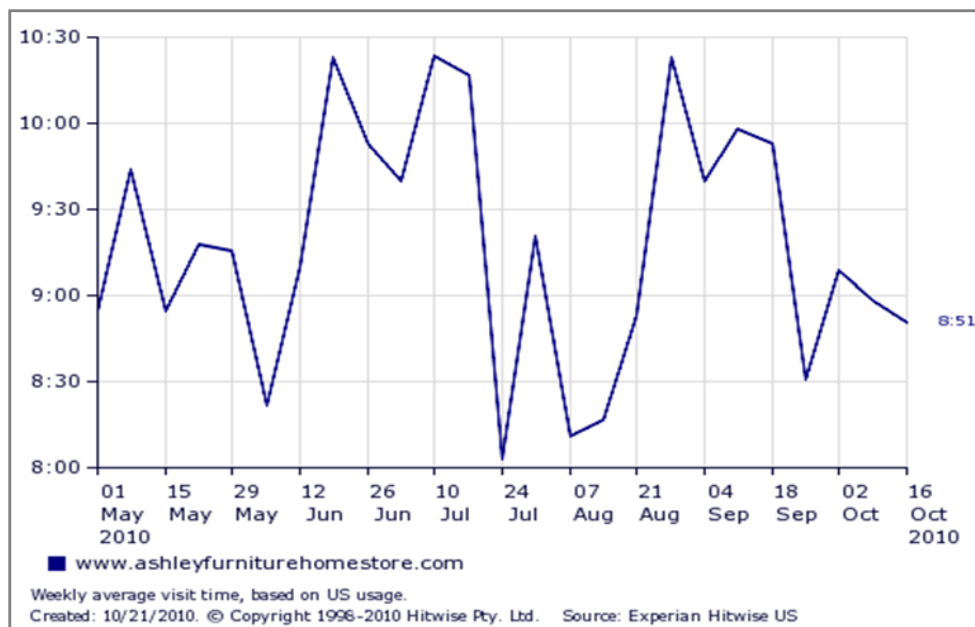
Social drives traffic to branded sites

Email and social combined deliver a one-two punch to boost traffic to branded Websites

Companies looking to drive traffic to their core brand sites should strongly consider a social media campaign promoted by email. According to Experian CheetahMail, a leader in digital marketing, making email the foundation of a social campaign is key, given that the typical company's email list is 32 times larger than the number of fans they have on Facebook. An analysis conducted by Experian Hitwise also reveals that, 60% of brands that sent out an email with the word "Facebook" in the subject line averaged a 27% increase in traffic to their website the week following the email deployment.

Furthermore, time spent on websites also jumps after a social media campaign. For example, Experian Hitwise found that the average time spent by visitors on the website of furniture retailer Ashley Furniture spiked after the company sent out marketing emails that drove recipients to a social media site.

Average time spent on AshleyFurnitureHomeStore.com



Source: Experian Hitwise, August 2011

Tip: Leverage your email list to drive your social campaign. Doing so will likely increase email open rates and result in a boost in traffic to your core brand site.

Facebook and Twitter capitol

Social Media darlings have different geographic distribution

Heavy Facebook users, defined as those online adults who visit Facebook.com more than 15 times per month, are found in heaviest concentrations in America's college towns, with the Designated Market Area (DMA) of Waco-Temple-Bryan, Texas claiming the top post. Residents of this market, which is also home to Texas A&M and Baylor universities, are 17% more likely than the average online adult to be heavy Facebook users. Given the association between Twitter and celebrities, it should come a little surprise that heavy Twitter users are found predominantly in California markets, such as Fresno, Bakersfield and Los Angeles. The higher than average use of Twitter among Hispanic consumers (18% of Twitter.com visitors are Hispanic versus 14% of the adult population overall) may also explain the presence of markets with high concentrations of Hispanic Americans, such as Harlingen and Laredo, Texas.

Top Markets for Heavy Facebook.com Visitors

Designated Market Area (DMA)	Index*
Waco-Temple-Bryan TX	117
Mankato MN	117
Columbia-Jefferson City MO	116
Ft. Wayne IN	116
St. Joseph MO	116
Charlottesville VA	116
Oklahoma City OK	115
Harrisonburg VA	115
Bangor ME	115
Butte-Bozeman MT	114

Top Markets for Heavy Twitter.com Visitors

Designated Market Area (DMA)	Index*
Harlingen-Weslaco-Brownsville-McAllen TX	200
Fresno-Visalia CA	179
Bakersfield CA	167
Laredo TX	166
Los Angeles CA	152
Yuma AZ-El Centro CA	147
Corpus Christi TX	141
Columbia SC	138
Greenwood-Greenville MS	138
Dallas-Ft. Worth TX	132

*Base: online adults. Markets with adult population of 50,000+ shown.

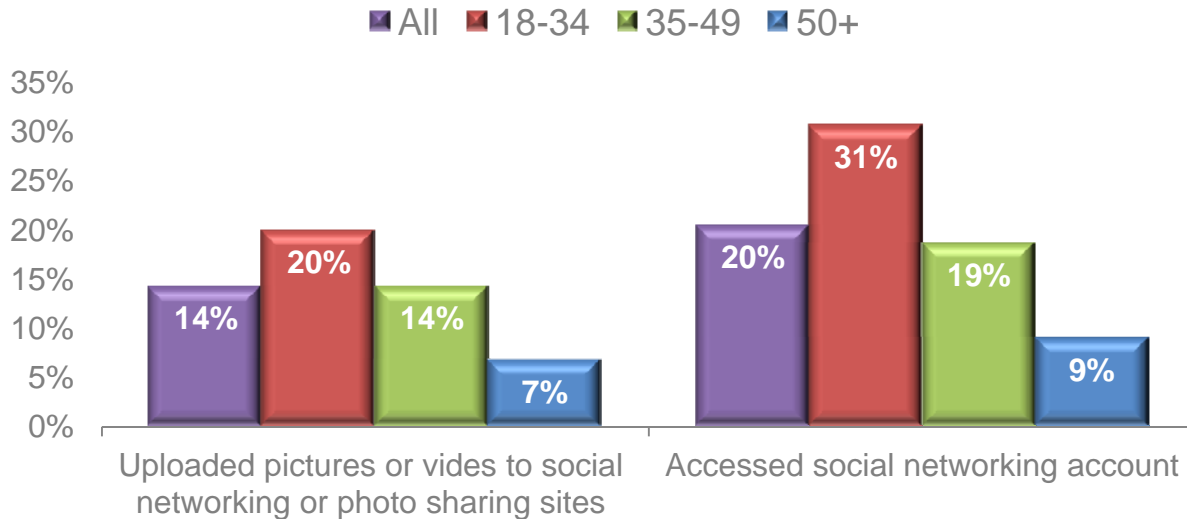
Source: Experian Simmons

Social is mobile

The worlds of social and mobile are getting cozy

The share of social networkers accessing their account from a mobile phone is growing at a rapid rate. In 2011, 20% of social networkers access their social account from a cell phone in a given month, up from just 11% who did so in 2009, a relative increase of 85%. Social networkers are also increasingly uploading pictures and videos to their profile directly from their phone. During a typical month, 14% of social networkers now upload photos and videos to their social networking account or other photo sharing sites from their cell phone, up from 10% who uploaded pictures and videos in 2009. Younger social networkers are notably more likely to interact with social networking sites from a mobile phone.

Mobile activities done by social networkers in the last 30 days, by age*



Source: Experian Simmons

Tip: Make sure your company's website is optimized for mobile web browsers and give your customers ways to interact with your business via social channels like Foursquare or Facebook Places.

Social is mobile

Scan your customer base and connect

Expanding mobile access to social networks means consumers can share their feelings towards a brand and influence those in their social network within minutes of a good (or bad) experience. Beauty brands like Got2B, M.A.C., Bed Head and Bobbi Brown are all consumer brands whose users are notably more likely than the average adult to support brands on social sites.

Top indexing brands among consumers who support companies/groups via social networks

Brand	Index
Got2B	184
First Response	182
San Pellegrino	182
Audiovox	181
M.A.C.	180
Bed Head	178
iPod	176
Guess	176
Alcon	175
Bobbi Brown	175

Source: Experian Simmons

Tip: Find out if your customers are supporters of brands online and develop a compelling way to engage them via social media. Also, make sure you have a way to respond to negative feedback in a quick and effective way.

Mobile (app)etite

20.7 million cell phone owners have downloaded an app in the last month

Mobile apps enable consumers to make the most of their phones, and mobile consumers are downloading apps more than ever. Today, 16% of cell phone owners have downloaded a mobile app within the last 30 days, up from 11% who did so in 2008. While music apps are the most common, with fully 97% of app downloaders having at some point downloaded such an app, nearly a third of app users have downloaded a social networking app to their phone.

Top mobile app types downloaded by recent downloaders

Type of mobile app downloaded	%	Type of mobile app downloaded	%
Music	97%	Utilities	23%
Games	43%	News	23%
Entertainment	42%	Reference	21%
Weather	33%	Travel	20%
Social networking	29%	Shopping	19%
Sports	26%	Finance	19%
Communication	25%	Food/Health	9%

*Base: online adults

Source: Experian Simmons

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