

May 2014

# Yellow™ Social Media Report

What Australian people and businesses are doing with social media



# Yellow™ Social Media Report

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# Foreword

Now in its fourth year, the Social Media Report is providing insight not just in the growth of social media but in the ever changing way that consumers, business and government are using social media. This year is particularly interesting in the way that different tribes or demographics are not only changing their behaviours but also are influencing others in their social media usage.

Over the past year we have seen social media become an integrated part of most marketing campaigns as well as a channel to market. Based on the reach and deep engagement outlined in the report there is a case for continued increases in investment in the medium by the corporate sector.

Consumer attitudes to social media show that trust is the fundamental principle that businesses should embrace in their social media activities. Consumers will reward those companies that demonstrate greater trustworthiness through genuine transparency in communication.

The association between mobile devices and social media again increased with smartphones and tablets being the highly preferred devices for most social media activity.

AIMIA is proud of its association with the report and congratulate Sensis on another insightful report.



David Holmes  
Chief Executive Officer  
The Australian Interactive Media Industry Association

Social media is a great way for small businesses to engage with potential customers, increase brand awareness and ultimately, boost sales. While the hashtags, real-time communication and analytics may overwhelm some businesses, the benefits of this marketing powerhouse are many.

Our Yellow Social Media Report offers unique insights into how consumers and businesses are using social media in Australia. For the uninitiated, social media refers to networking websites like Facebook, Twitter, Google+, LinkedIn, Tumblr, Instagram and Pinterest.

Our research covers all facets of the rapidly-evolving social media landscape in Australia. While it's a fascinating snapshot of consumer behaviour, it offers real revenue potential to business owners.

Here at Sensis we are the leading provider of digital marketing products in Australia. As many businesses transition to an online model, we are there to help them with their business needs ranging from setting up websites, helping their brands to be found on Google and getting the most out their social media platforms.

We hope you enjoy the insight from this report and we look forward to keeping you up to date with new trends as they unfold.

Happy reading!



Kelly Brough  
Chief Digital Officer  
Sensis

# Executive summary

## Australians and social media

Over the past year we have seen the social media landscape in Australia marked by both growth and change. Growth in the proportions of Australians that use social media has continued, while change reflects the adoption of new platforms and uses of social media.

While in previous years, social media growth was primarily driven by younger demographics, now the growth is being driven by Australians in an older demographic group. At the same time younger Australians are driving adoption of new, more visual platforms, such as Instagram, Tumblr and Snapchat, as usage of their previous favourites, like Facebook, has become more mainstream.

Some 69% of Australians now use social media, and Facebook continues to dominate the social media landscape, with 95% of social media users on the platform. On average, Facebook users spend more than eight and a half hours a week on the site, increasing an hour and a half over the past year.

The importance of mobile cannot be overlooked in any analysis of social media. Last year mobile devices became the predominant means of accessing social media, and their importance has continued to grow this year. For mobile users, the nature of their social media experience remains significant, with users strongly favouring access through mobile applications rather than websites on their devices.

While "social" uses are still the top reasons people use social media, approximately three in ten are using social media for commercial purposes, to find out about particular brands and businesses, with consumers also using social media to research purchases and to access offers and promotions.

Social media is now a significant path to purchase. Overall, 30% of social media users report that they use social media to research products and services that they want to buy, with 63% of those that use social media to research purchases reporting that their last research resulted in a purchase, up from 58% last year. Of those purchases, just under half were made online, with the majority made "offline" highlighting the importance of social media for "bricks and mortar" stores.

While social media users are most interested in what businesses can give them in the form of discounts (62%), giveaways (51%), product information (49%), tips and advice (45%) and coupons (40%), all of these have seen marginal decreases in the past year, with the only area to increase being information about the company. The subtle changes seen here reflect the continued maturation of the social media landscape in Australia.

## Australian businesses and social media

However, whilst consumer usage of social media has become mainstream, businesses are still lagging behind consumers, despite having significantly increased their involvement over the past year. The surveys discovered that while 69% of online Australians use social media, only 36% of small businesses and 48% of medium-sized businesses have a social media presence, potentially missing a significant opportunity for their businesses to connect with customers and build relationships with their existing customers.

Significantly, small and medium businesses that had embraced social media were more likely to report better business performance, being more likely to report increased sales, profitability and employment than those without a social media presence. They were also more likely to be aiming to grow their business.

Social media continues to present a significant opportunity for businesses to connect with people, but businesses and marketers need to understand and respect consumers' preferences on how they do this if they are to establish an effective social media conversation.

Despite falls in overall spends, this was driven more by falls in marketing budgets overall, with the proportion of businesses' marketing budgets that was spent on social media increasing further over the past year. Small businesses reported spending approximately 16% of their marketing budgets on social media, with medium businesses spending almost 12% of their marketing budget on social media, and large businesses spending over five per cent. However a sizeable proportion of businesses investing in social media are unaware of the actual amount they've invested, and don't measure the return on their investment, something that has declined, in general, over the past year.

And despite the investment in social media, almost three in ten small businesses have no strategy to drive traffic to their sites, reflecting a lack of strategic approach for social media in small businesses generally. Less than a quarter of small businesses that used social media had a strategic plan in their business for it, compared to just under half of medium businesses and just under three-quarters of large businesses.

# Methodology

This report contains the results of research conducted by Sweeney Research between February and April 2014.

## Consumer survey

The research consisted of a telephone survey among 800 randomly selected respondents across Australia. Quotas were applied to provide for adequate representations in each age group and both genders. Quotas were also applied on location to ensure coverage across metropolitan and regional areas in each State and Territory. The interview fieldwork was conducted between Feb - April 2014. The data was weighted by age and gender within location so that the results are reflective of the actual Australian population. Sample sizes by age and gender are shown below.

### Sample size - consumer

	Total	Male	Female
14 to 19 years of age	70	33	37
20 to 29 years of age	101	48	53
30 to 39 years of age	127	50	77
40 to 49 years of age	156	78	78
50 to 64 years of age	186	93	93
65 plus years of age	160	81	79
<b>Total</b>	<b>800</b>	<b>383</b>	<b>417</b>

## Business survey

The findings for small businesses (1 to 19 employees) and medium-sized businesses (20 to 199 employees) come from additional questions included in the March 2014 Sensis® Business Index. These findings are based on interviews with some 1,800 SME proprietors from across Australia. Quotas are applied on business size, business type and location to ensure that the sample is reflective of the actual business population across Australia. Interviews were conducted in the period Feb - April 2014.

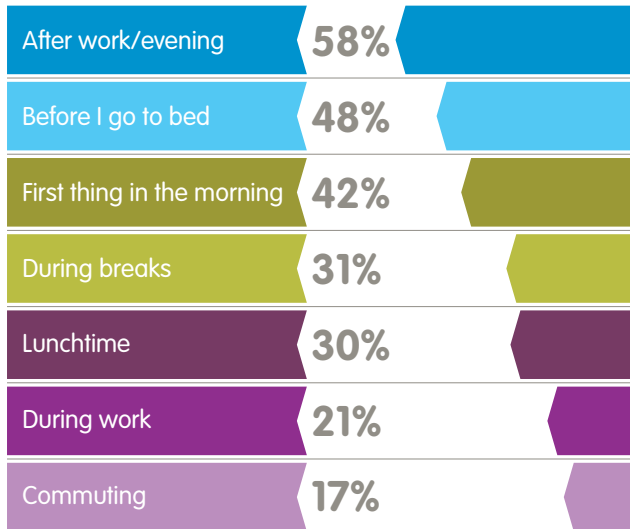
The findings for large business (200+ employees) are based on a separate survey conducted among 150 marketing decision-makers in large businesses. Quotas were again applied to ensure an adequate representation across the various regions of Australia. Quotas were again applied to ensure an adequate representation across the various regions of Australia. Interviewing for this survey was conducted in April 2014. Total sample sizes by business size are shown in the table below.

### Sample size - Business

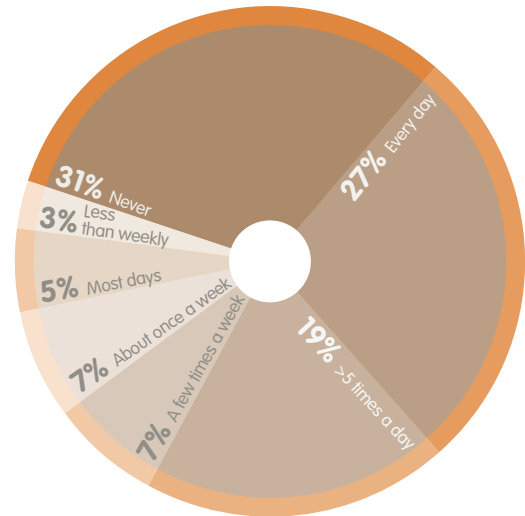
Number of employees	Sample
1 to 2 employees	601
2 to 4 employees	267
5 to 9 employees	308
10 to 19 employees	271
<b>Total small businesses</b>	<b>1447</b>
20 to 99 employees	315
100 to 199 employees	38
<b>Total medium businesses</b>	<b>353</b>
200 to 999 employees	97
1000+ employees	53
<b>Total large business</b>	<b>150</b>
<b>Grand total</b>	<b>1950</b>

Industry - small and medium businesses	Sample
Manufacturing	228
Building/construction	275
Wholesale trade	146
Retail trade	278
Transport and storage	123
Communication, property and business services	249
Finance and insurance	99
Health and community services	150
Cultural, recreational and personal services	107
Accommodation, cafes and restaurants	145
<b>Grand total</b>	<b>1800</b>

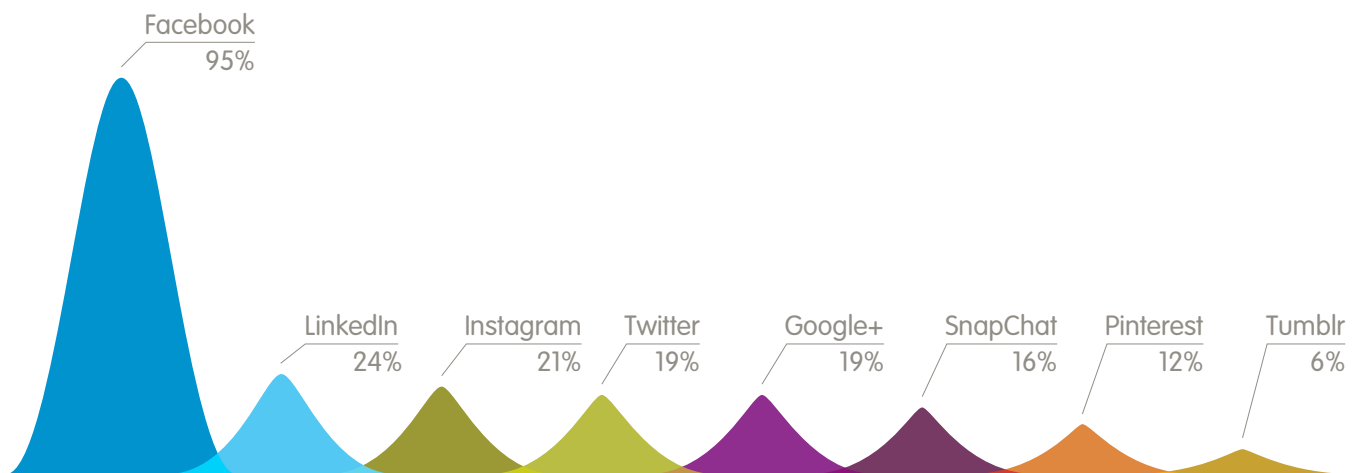
## When we use social media



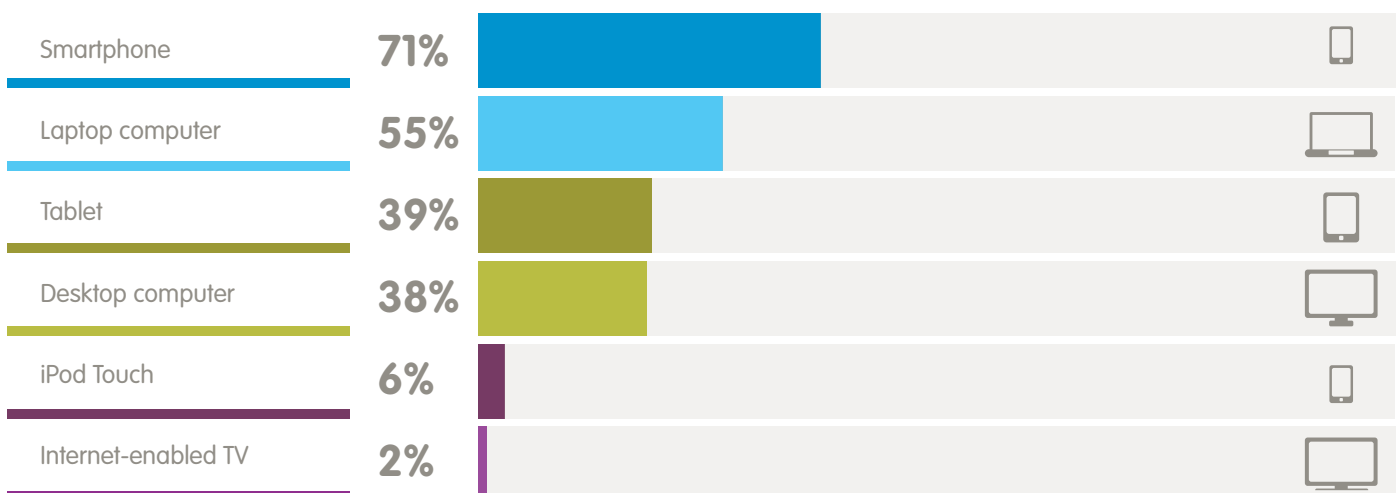
## How often we use social media



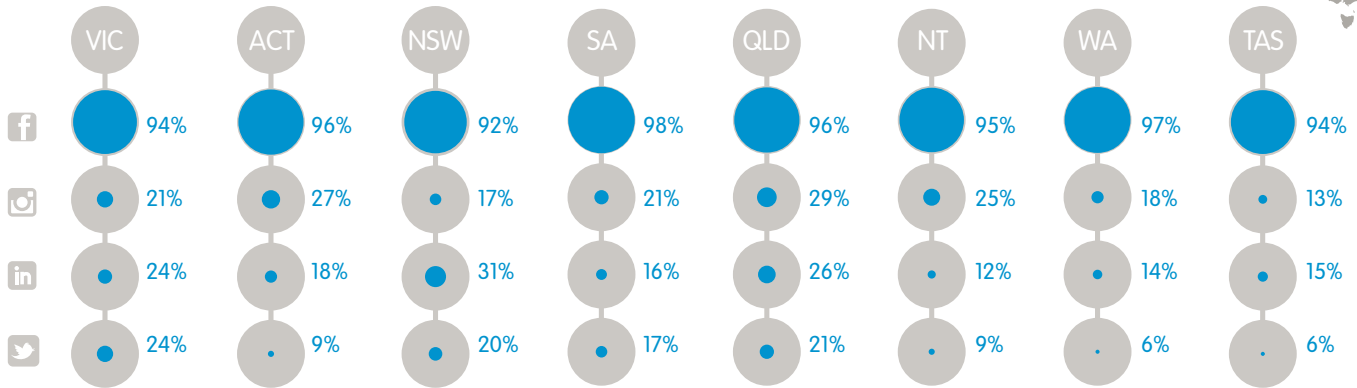
## The social networks we use the most



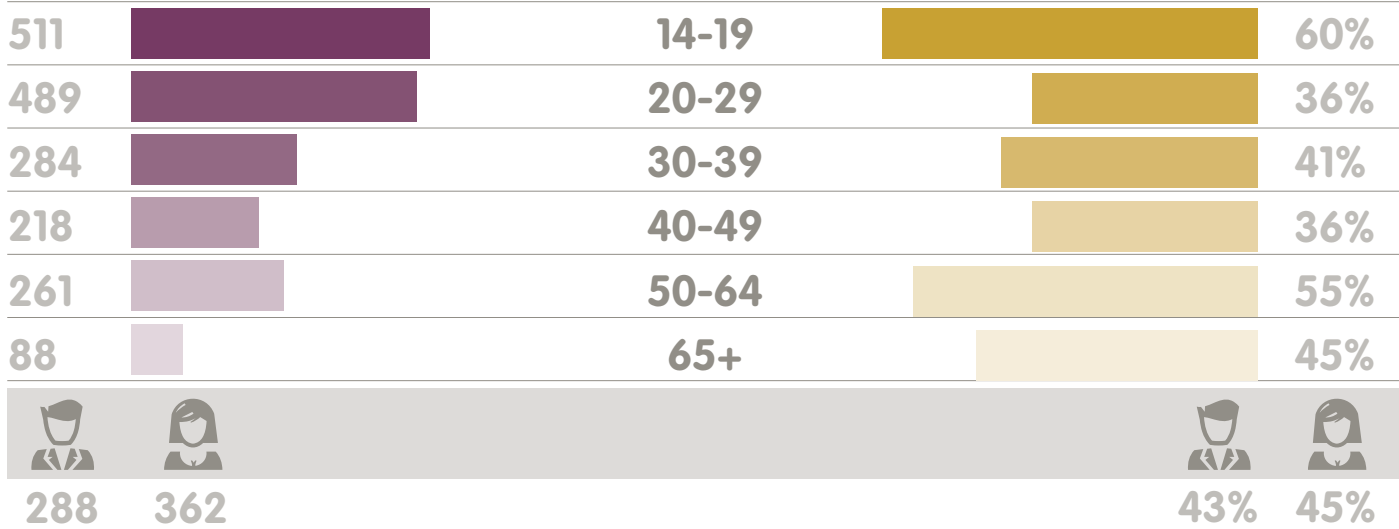
## Devices we use to access social media



## The percentage of us using social media sites, by state

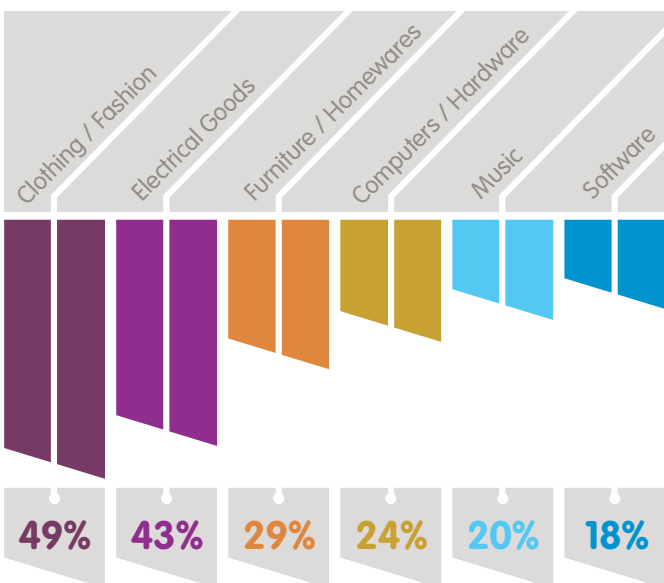


## Average number of friends, contacts or followers we have online

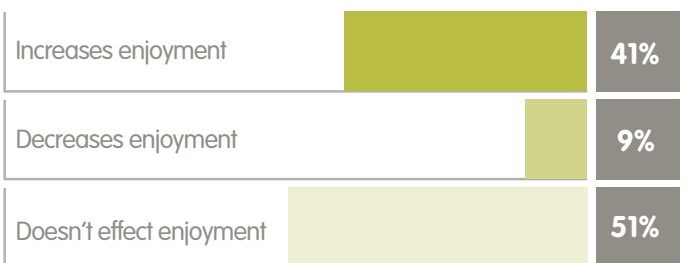


## Average proportion of online friends seen face-to-face in the past year

## What products/services we research through social media

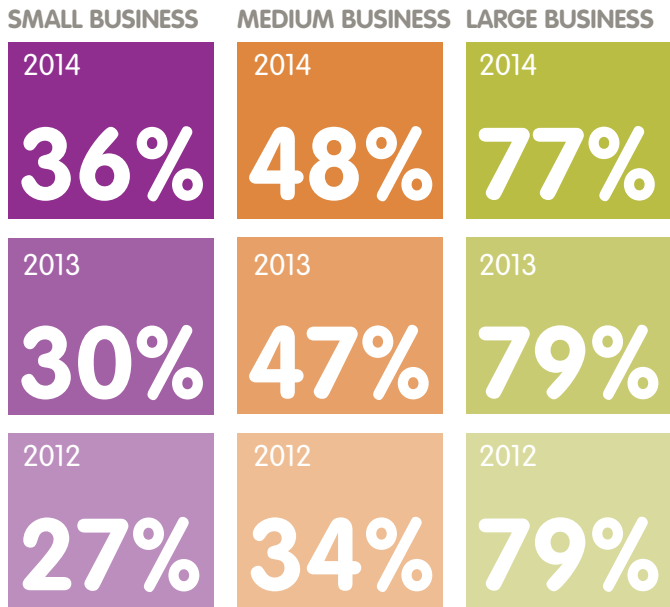


## Using social media whilst watching TV...

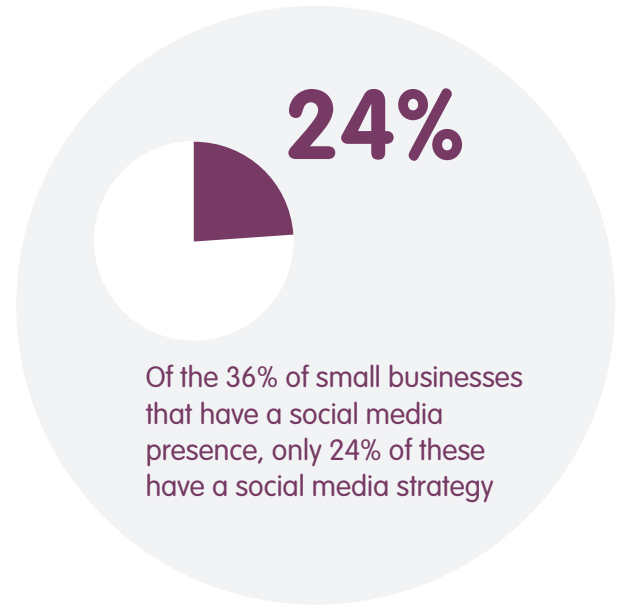


# Business in Australia

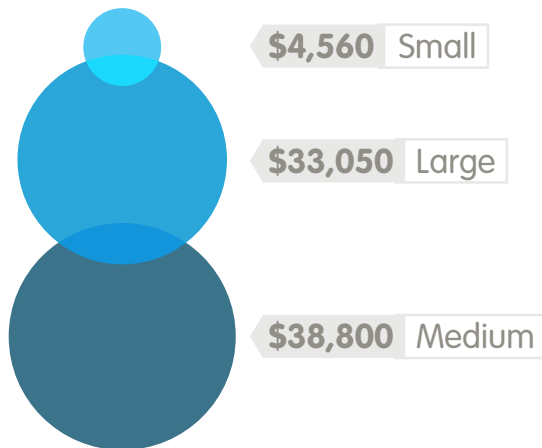
## Percentage of businesses that have a social media presence



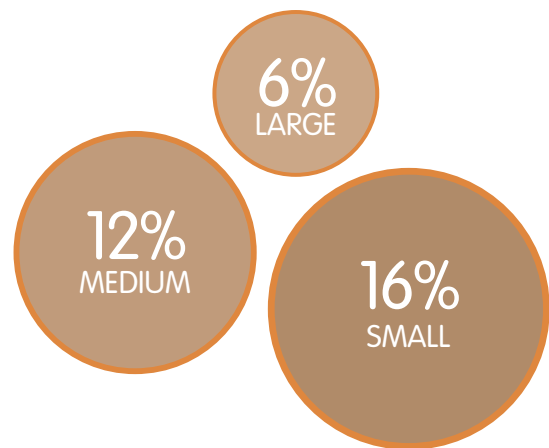
## Small businesses who have a social media strategy



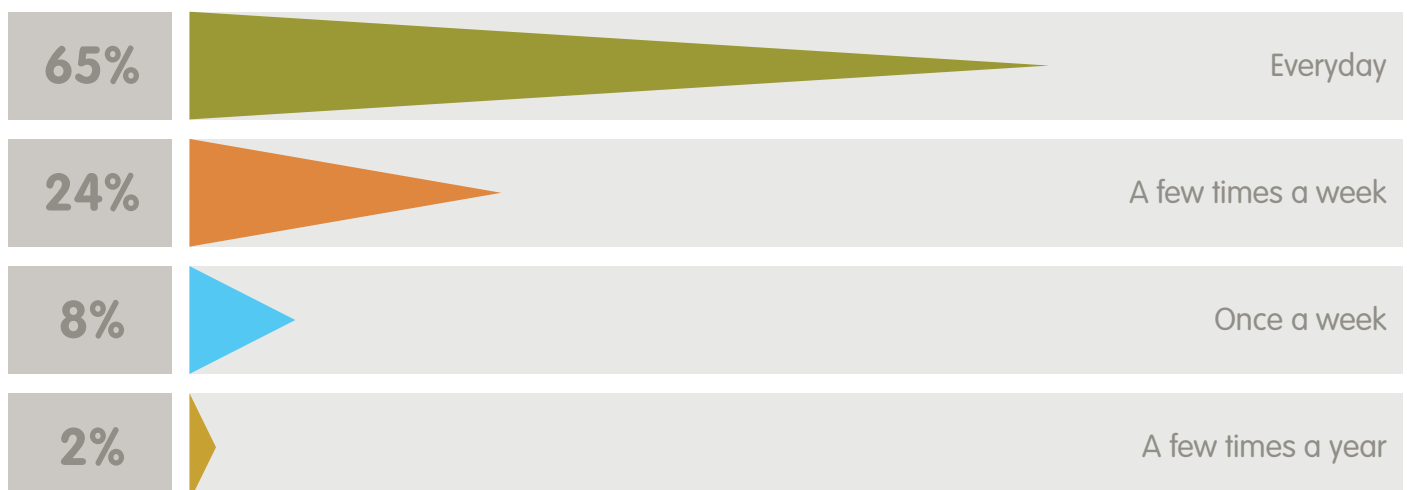
## Average yearly social media spend



## Percentage of marketing budget

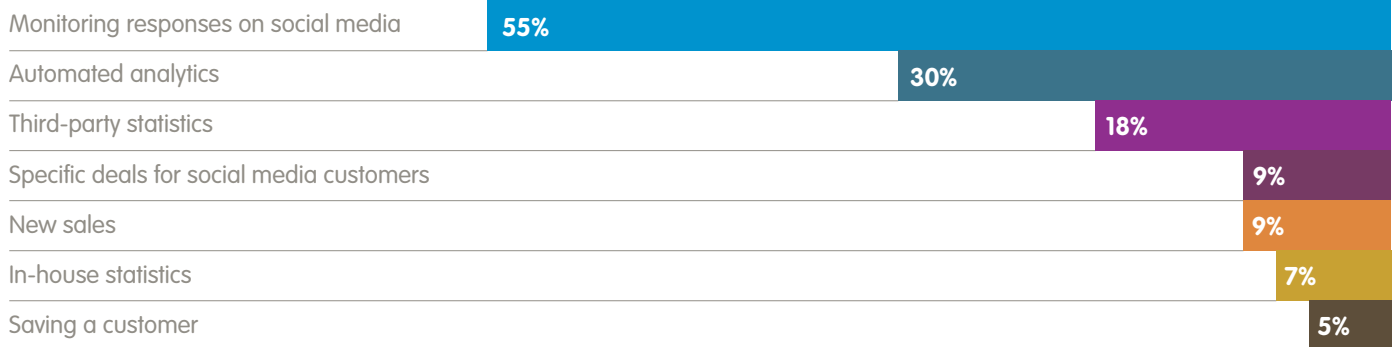


## How often do large businesses update their social media

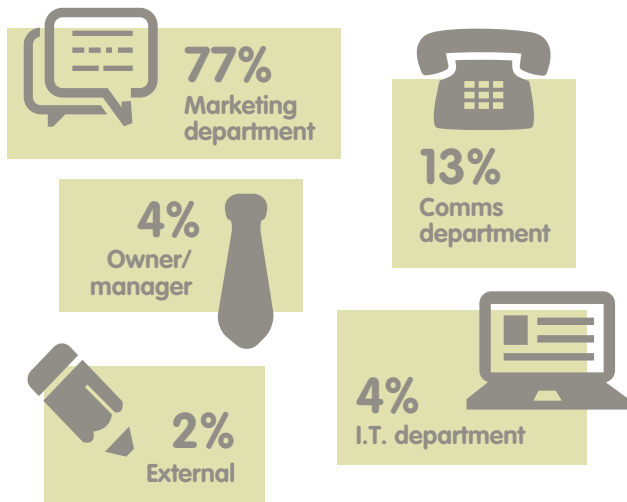




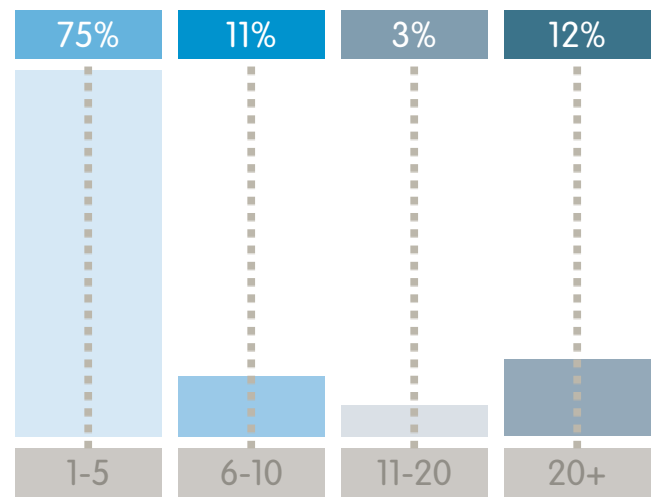
## How large businesses measure ROI



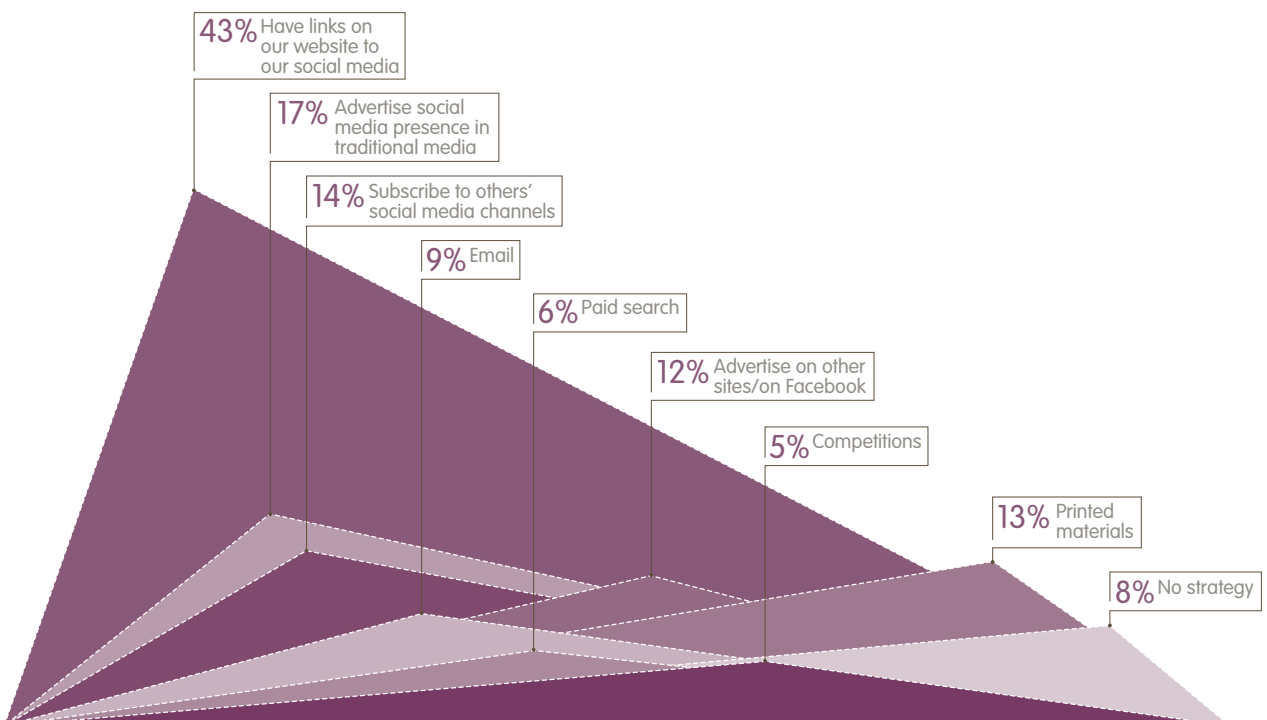
## Who is responsible for social media in a large business



## Number of people managing social media in a large business



## How large businesses drive traffic to their social media



**42%**

of users access social media first thing in the morning

**48%**

of users access social media last thing before bed

**61%**

of social media users under 20 use SnapChat

**95%**

of Australian social media users are on Facebook

**17%**

of female social media users use Pinterest

The typical Australian Facebooker spends more than

**8.5**

hours on site a week

**21%**

of Australian internet users aged 65+ access social media daily

**39%**

of social users access social media at work

Australian social users have an average of

**328**

fans or followers.

**Section 1:**

Yellow Pages 

# The general public and social media

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**49%**

use social media in the bedroom

**28%**

use social media to research products and services

**71%**

of Australian users access social sites on a smartphone

only

**9%**

of social media users engage with Government on social sites.

**30%**

have given online ratings and reviews

**19%**

of Australians access social media more than 5 times a day

**33%**

of social media users follow businesses

**69%**

of Australians use social media

**41%**

of Australians use social media while watching TV

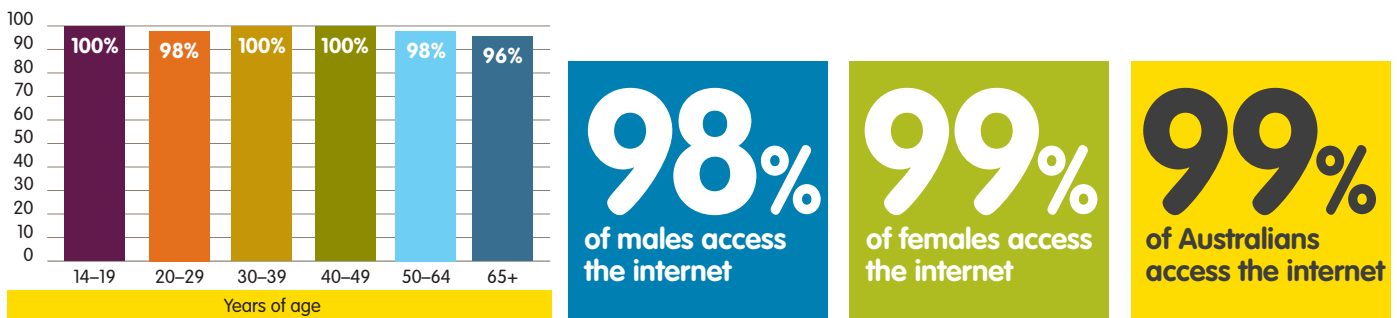
# Internet Access

Internet usage is now near-universal across all age groups with the lowest usage in the 65+ age group at 96%.

## Frequency of internet use in Australia



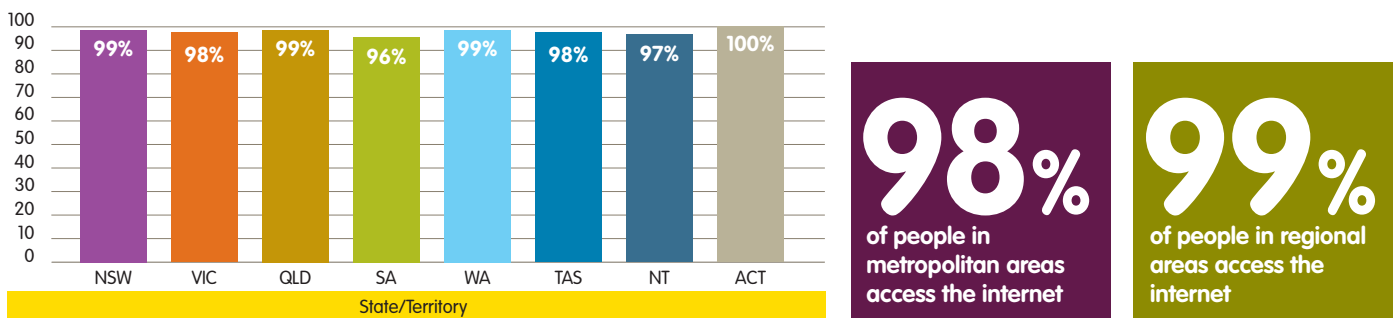
## Proportion that access the internet by age and gender



Base: All contacts (800) Q. How often, if at all, do you access the Internet – either on a computer or on your mobile phone or other devices such as an iPad or iPod Touch?

## Proportion that access the internet by location

Internet usage showed little variation around the states and territories, with the lowest level of usage in South Australia, where internet usage was at 96%.



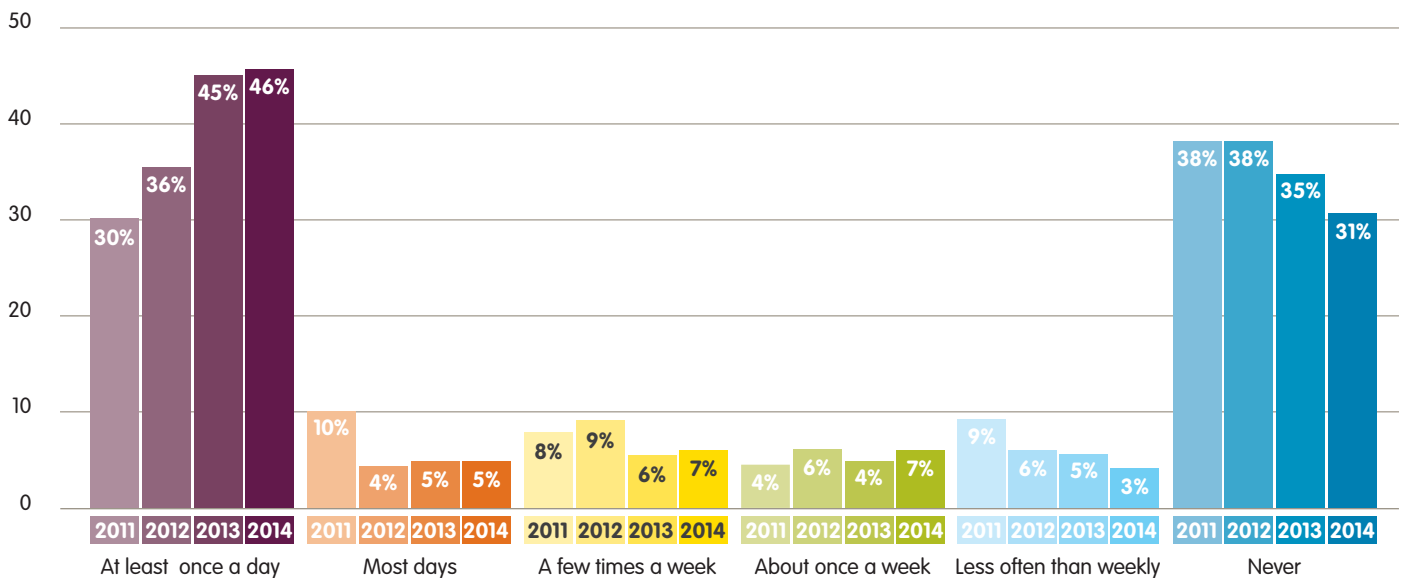
# Social networking site usage

Among Internet users, some 69% use social networking sites such as Facebook, LinkedIn and Twitter, up from 65% last year. Some 46% use social networking at least every day, up marginally from 45%, with 19% using it more than five times a day, reflecting a continued increase of intensity of social networking in the daily lives of Australians. Most usage frequencies saw small increases in usage over the last year, with the largest change being the increase in usage of social media overall, and a corresponding decline in the proportion of online Australians that did not use social media at all.

## Frequency of using social media

“ How often do you use social media? ”

19%	More than five times a day
27%	Everyday
5%	Most days
7%	A few times a week
7%	About once a week
3%	Less often than weekly
31%	Never



Frequency of using social media – Trends

**46%**  
of internet users use social media every day

**19%**  
access sites more than 5 times per day

**Base: All Internet users (789)** Q. How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?

# Social networking site usage

(age, gender and location)

Females remained significantly more likely to be social networking users than males, and they were also much more frequent users of social networking sites. There were even more significant variations by age group – with the majority of Australians aged under 40 using social networking sites every day. Social networking was almost ubiquitous for those Australians aged under 30, with less than one in ten not using social media at all, and those in their 20s reporting the most frequent usage. Those in metropolitan areas are slightly more likely to use social networking sites, however regional users were more frequent in their use. Residents of the Northern Territory were the most likely to report using social networking sites, closely followed by those in Queensland.

## Frequency of using social media by age and gender

Frequency of using social networking sites	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
At least once a day	46%	40%	53%	69%	71%	57%	45%	29%	21%
Most days	5%	5%	6%	4%	9%	8%	2%	8%	1%
A few times a week	7%	10%	5%	18%	6%	6%	6%	6%	7%
About once a week	7%	6%	7%	2%	6%	6%	9%	10%	2%
Less often than weekly	3%	4%	2%	0%	3%	2%	3%	5%	1%
Never	31%	34%	28%	7%	4%	20%	33%	42%	68%

## Frequency of using social media by location

Frequency of using social networking sites	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
At least once a day	46%	39%	44%	52%	54%	57%	56%	51%	44%	45%	50%
Most days	5%	2%	7%	11%	3%	6%	1%	8%	7%	5%	6%
A few times a week	7%	9%	5%	7%	8%	7%	6%	9%	4%	9%	4%
About once a week	7%	9%	8%	3%	4%	5%	5%	3%	4%	8%	3%
Less often than weekly	3%	4%	2%	3%	5%	2%	3%	8%	13%	3%	2%
Never	31%	38%	35%	22%	26%	23%	28%	21%	28%	29%	35%

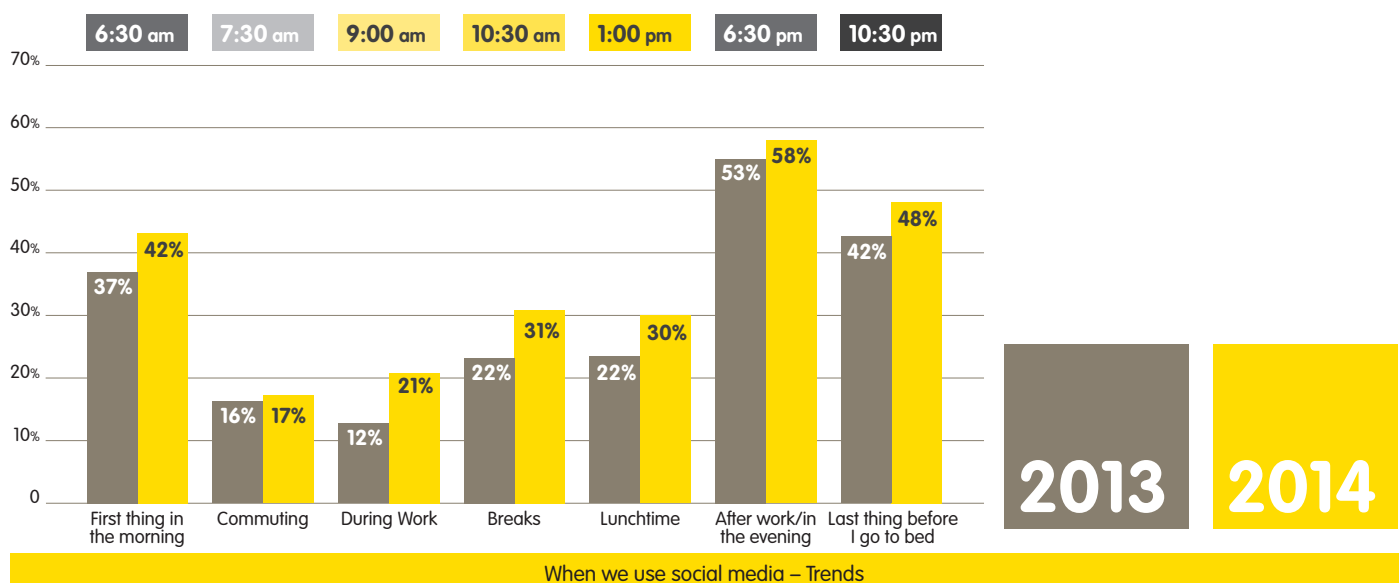
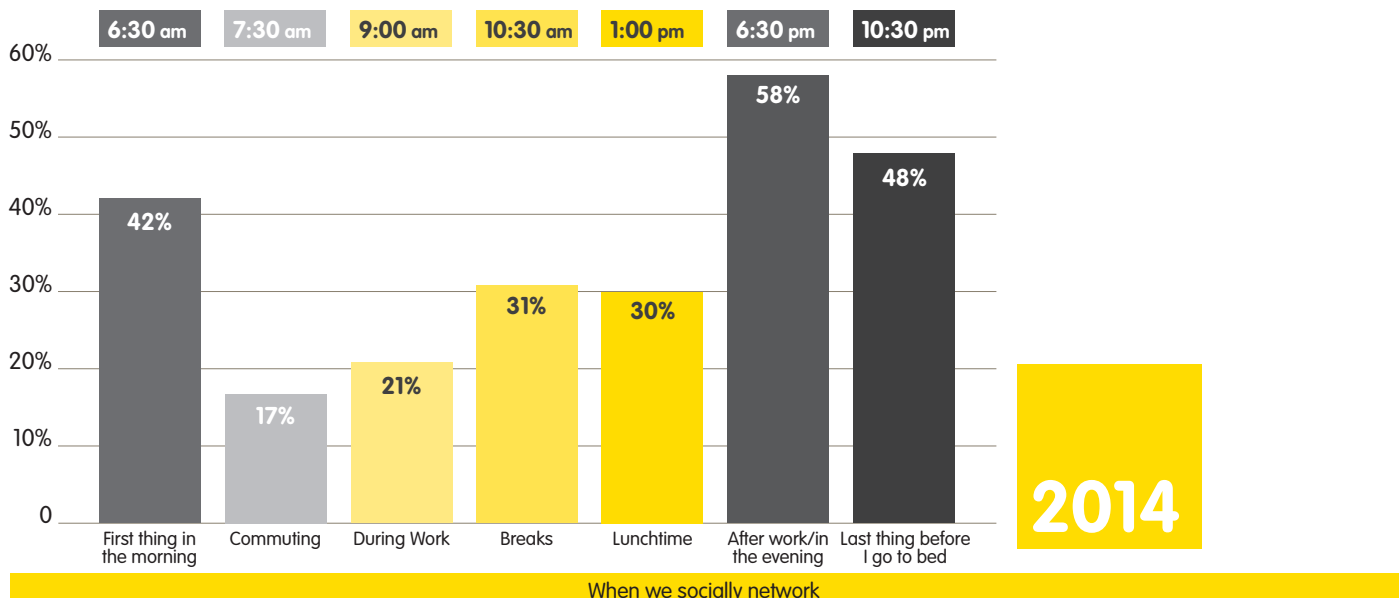
Base: All Internet users (789) Q. How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?

# Social media usage

(time of day)

While Australians tend to access social networking sites throughout the day, with 42 per cent of social networkers looking at them first thing in the morning and 48 per cent checking as the last thing before bed. After work in the evening was the most popular time to check our networks, with 58 per cent of Australians who socially network reporting usage after work. Females were more likely to use social media first thing in the morning and last thing before bed, while males were more likely to access social media during work and after work/in the evening.

## Frequency of using social media network



# Social media usage by time of day

(age, gender and location)

## Frequency of using social media by age and gender

When we socially network	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
First thing in the morning	35%	49%	33%	44%	40%	47%	39%	58%
Commuting	14%	20%	13%	27%	20%	22%	7%	1%
During work	23%	20%	12%	26%	24%	24%	25%	3%
Breaks	29%	33%	25%	50%	32%	31%	22%	5%
Lunchtime	25%	34%	31%	41%	29%	30%	22%	14%
After work/in the evening	61%	56%	77%	55%	61%	53%	64%	24%
Last thing before I go to bed	43%	52%	38%	57%	46%	40%	51%	55%

## Frequency of using social media by location

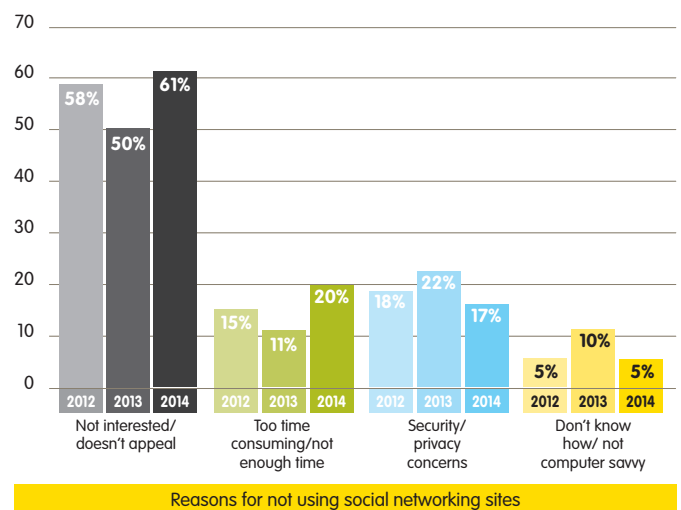
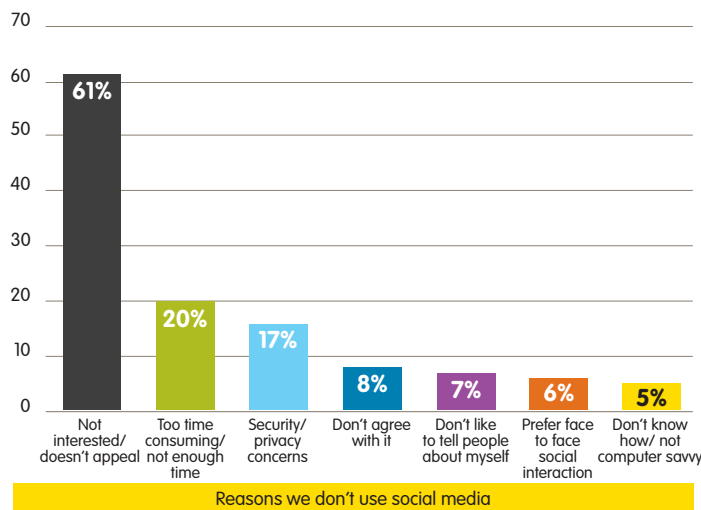
When we socially network	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
First thing in the morning	40%	40%	42%	39%	58%	51%	25%	53%	40%	49%
Commuting	17%	26%	8%	21%	16%	18%	14%	5%	19%	14%
During work	21%	28%	19%	19%	18%	21%	17%	9%	23%	19%
Breaks	33%	36%	23%	36%	28%	37%	32%	18%	30%	33%
Lunchtime	31%	37%	26%	30%	21%	29%	20%	14%	30%	29%
After work/in the evening	55%	63%	64%	55%	48%	53%	71%	51%	56%	64%
Last thing before I go to bed	53%	51%	41%	57%	38%	49%	34%	27%	47%	50%

Base: Users of social media (533) Q. When do you most commonly look at your social networking sites?

# Reasons for not using social media

The chart below summarises reasons for not using social networking sites and shows that lack of interest/appeal continues to be the primary reason, with 59% of those not using social media giving this as a reason. A view that social networking was too time consuming increased during the past year, to be the second most common reason for not social networking. Security and privacy concerns were the third most frequent reason for not using social media, falling from 22% last year to 15% this year. Other key reasons for not using social media included a preference for face to face social interaction, a feeling of not being computer savvy enough to know how to social network and some feeling uncomfortable telling others about themselves on social networking sites. Some five per cent of Australians that do not currently use social media have used it but stopped in the past year. The sites most likely to have been dropped in the past year by those not currently using social media were Facebook and LinkedIn.

## Reasons for not using social media



## Reasons for not using social media - verbatim comments

<p><b>"Emphasises triviality."</b></p> <p>Male (65+ years)</p>	<p><b>"Rather have a phone call from a friend than see what they ate for breakfast."</b></p> <p>Female (30-39 years)</p>	<p><b>"Heard too many negative comments about it."</b></p> <p>Male (65+ years)</p>	<p><b>"I think it creates a lot of secrecy in the household, too much time spent on it."</b></p> <p>Male (50-64 years)</p>	<p><b>"Dangerous for my kids – don't want my kids using it."</b></p> <p>Male (40-49 years)</p>
<p><b>"Annoyed by privacy details."</b></p> <p>Male (50-64 years)</p>	<p><b>"Facebook uses too many downloads."</b></p> <p>Male (65+ years)</p>	<p><b>"It's for people that don't have a real life."</b></p> <p>Male (65+ years)</p>	<p><b>"I find e-mails time consuming enough, don't need to spend more time."</b></p> <p>Male (50-64 years)</p>	<p><b>"I work in psychiatry – it causes more problems."</b></p> <p>Male (50-64 years)</p>

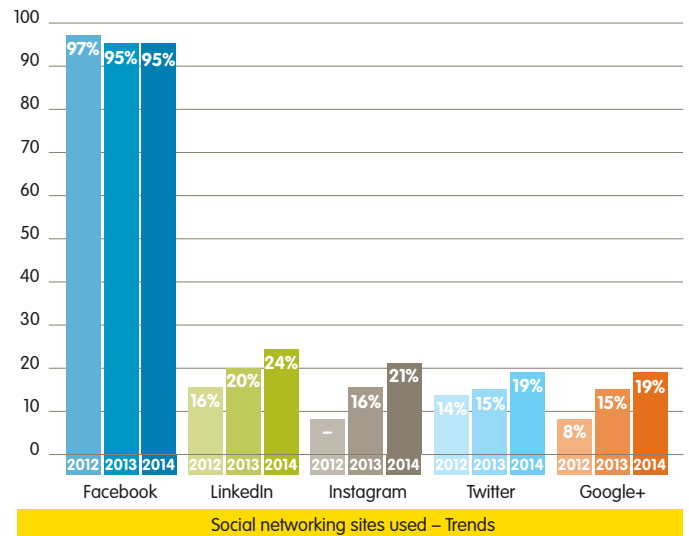
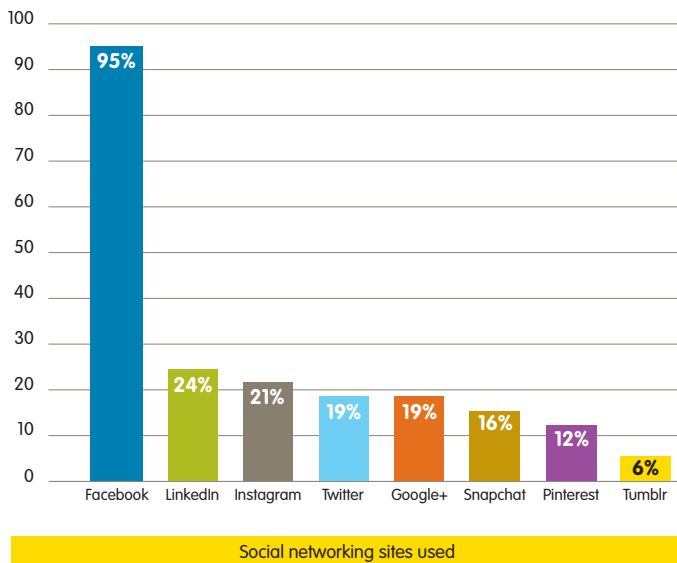
Base: Non users of social media (256) Q. Why don't you use social networking sites?



# Social networking sites used

Facebook continues to dominate as the most used social networking site, being used by 95% of social networking participants, which was unchanged in the past year. While Facebook was the most common social networking site across all age demographics, the highest usage rates were amongst those aged over 50, with those users not as likely to use some of the newer platforms as their younger counterparts. LinkedIn was the next most popular social media platform, being used by 24% of social networking users, up from 20% last year, with usage highest amongst those that were employed full-time as well as higher income demographics. LinkedIn usage was higher amongst males, with Twitter and Google+ the only other sites to record higher male usage. More visual platforms like Instagram, Snapchat and Tumblr showed very strong usage amongst the younger age demographics, with usage dropping significantly for those over 30. Google+ was used by 19%, up from 15%, with Twitter also used by 19% of social networking site users, up from 15% last year. Pinterest usage, at 12% of social media users, was heavily dominated by female-users.

## Social media used



**95%**  
of Australian social media users use Facebook

**17%**  
of female social media users are on Pinterest

**61%**  
of social media users under 20 use Snapchat

**19%**  
of Australian social media users are on Google+

# Social media sites used

(age, gender and location)

## Social media sites used by gender and age

Social media sites used	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Facebook	93%	96%	94%	95%	94%	92%	97%	100%
LinkedIn	28%	21%	0%	28%	30%	33%	26%	14%
Instagram	12%	30%	53%	31%	20%	15%	3%	3%
Twitter	25%	14%	15%	27%	23%	11%	22%	5%
Google+	21%	19%	27%	21%	21%	15%	16%	13%
Snapchat	12%	20%	61%	24%	4%	12%	0%	0%
Pinterest	6%	17%	6%	16%	12%	12%	15%	1%
Tumblr	4%	9%	24%	8%	1%	2%	5%	5%

## Social media sites used by location

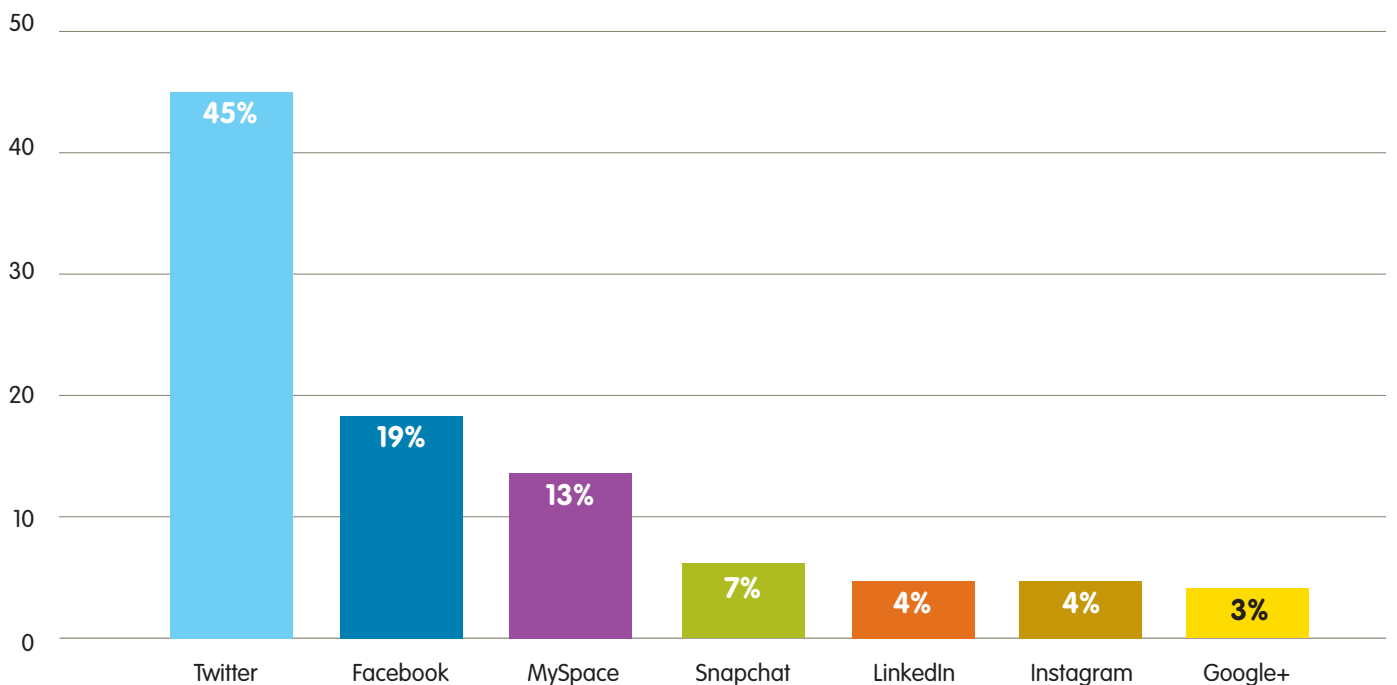
Social media sites used	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Facebook	92%	94%	96%	98%	97%	94%	95%	96%	93%	98%
LinkedIn	31%	24%	26%	16%	14%	15%	12%	18%	28%	17%
Instagram	17%	21%	29%	21%	18%	13%	25%	27%	22%	20%
Twitter	20%	24%	21%	17%	6%	6%	9%	9%	21%	15%
Google+	16%	21%	29%	18%	6%	15%	13%	20%	19%	20%
Snapchat	12%	22%	21%	7%	9%	11%	15%	23%	15%	18%
Pinterest	9%	12%	14%	14%	14%	10%	5%	9%	14%	7%
Pinterest	2%	16%	6%	5%	1%	0%	9%	5%	9%	2%

Base: Users of social media (533) Q. Which of these social networking sites do you use?

# Social networking sites we've stopped using

Despite solid growth in social media usage, there continued to be underlying shifts between sites. Some 11% of Australian consumers that use social media reported that they had stopped using some sites during the past year, little changed from 12% last year and 13% the year before. Of those that reported having dropped a social media site, Twitter was the one most mentioned, with 45% of Australians that reported having stopped using a social media site nominating Twitter unchanged in the past year.

## Sites Australians stopped using in the past year



Which sites Australians dropped in the past year

Base: Stopped using a social media channel in the past year (64) Q. Over the past year, have you stopped using any social networking channels?

Of the people who have dropped a social media site in the past year

45%

stopped using Twitter

while

19%

dropped Facebook

and

4%

dropped LinkedIn

and

13%

stopped using MySpace

# Frequency of using social networking sites

On average, Facebook users use the site around 30 times a week, up from 24 times a week in 2013. Average Twitter usage frequency is 11 times a week, dropping from 13 times a week last year, while LinkedIn users reported using the site 7 times a week on average, down slightly from 8 times a week in 2013.

Interestingly, the site that reported the highest number of weekly uses was Snapchat, a new but growing platform that enables ephemeral sharing of photos and videos before deleting them from the server. Snapchat users, predominantly aged under 20, reported using the site, on average, 32 times a week.

## Number of times used per week

Site	Proportion who use	Number of times per week						Average times per week
		Under 1	1 to 2	3 to 5	6 to 10	11 to 19	20+	
Facebook	95%	3%	13%	13%	25%	12%	33%	30
LinkedIn	24%	20%	40%	9%	23%	1%	8%	6
Instagram	21%	6%	18%	7%	28%	14%	27%	23
Twitter	19%	17%	34%	13%	23%	5%	8%	11
Google+	19%	6%	37%	15%	14%	12%	12%	12
Snapchat	16%	2%	18%	14%	22%	12%	32%	32
Pinterest	12%	23%	48%	10%	4%	4%	9%	5
Tumblr	6%	27%	29%	9%	15%	6%	14%	11

# Frequency of using social networking sites

## Average number of times used per week - Trends

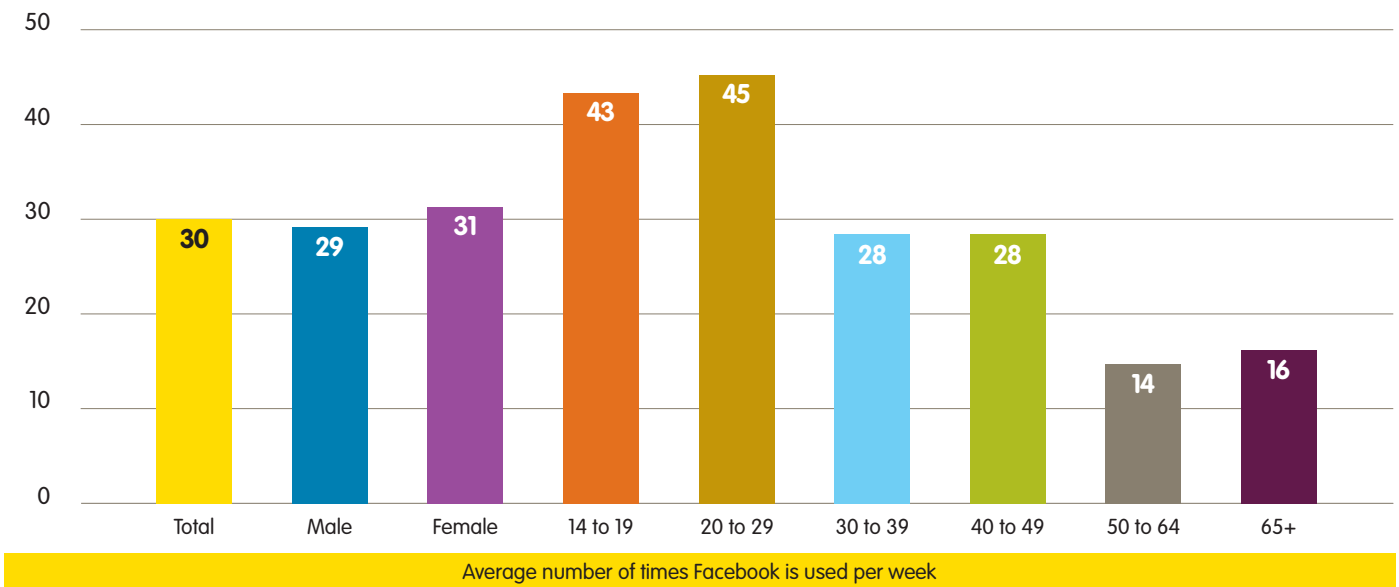


Base: Users of social media (533) Q. In a typical week, how many times would you use Facebook/LinkedIn/Twitter?

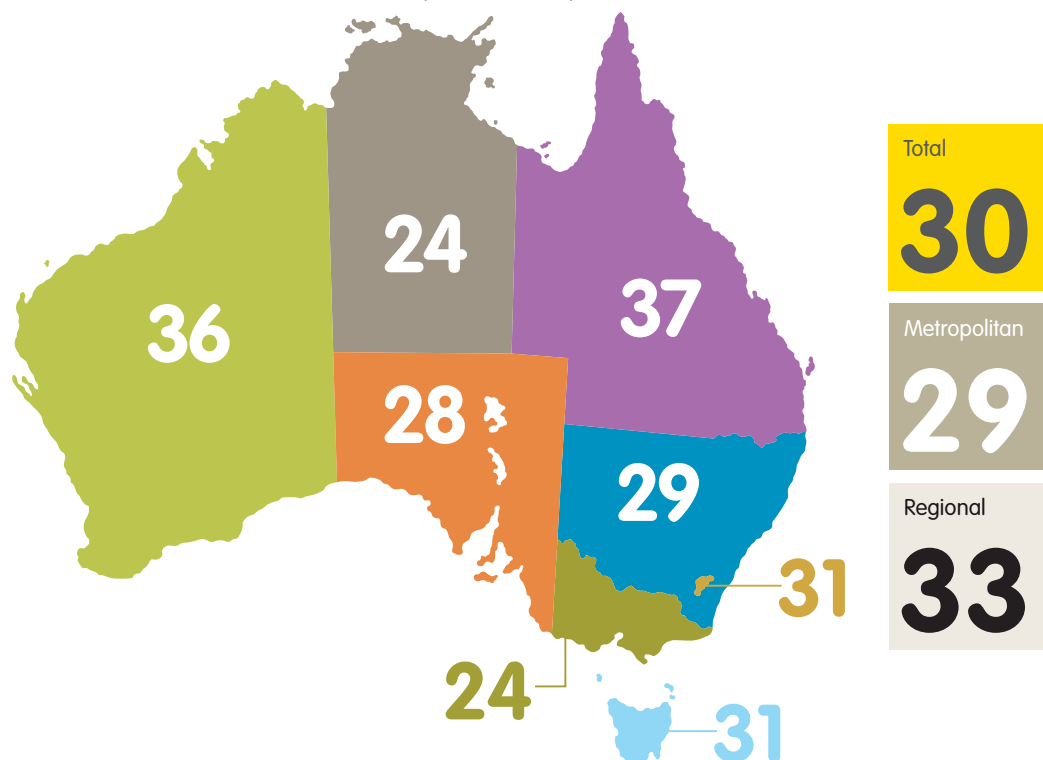
# Frequency of using social networking sites

The charts below look at average usage frequency for Facebook in more detail. Usage frequency peaks at more than **45 times a week** for those in their 20s and is higher in Queensland and Western Australia.

**Average number of times Facebook is used per week by age and gender**



**Average number of times Facebook is used per week by location**



# Time spent on social networking sites

On average, Facebook users spend around 17 minutes on the site each time they access it, down one minute from last year. If the average time spent is multiplied by the average number of usage occasions, the typical user would spend more than **8.5 hours per week** on the site, effectively an additional hour and a half a week more than last year. Only two platforms, Tumblr and Pinterest, recorded higher visit times than Facebook, with both being highly visual, browsing-based platforms. The shortage visit time was reported for Snapchat, with most visits being very short.

## Time spent per visit

Site	Proportion who use	Average time spent on each usage occasion						Average time (min)
		Up to 2 minutes	3 to 5 minutes	6 to 10 minutes	11 to 15 minutes	16 to 30 minutes	Over 30 minutes	
Facebook	95%	9%	23%	23%	12%	15%	18%	17
LinkedIn	24%	23%	39%	16%	9%	5%	8%	8
Instagram	21%	22%	23%	24%	10%	15%	6%	11
Twitter	19%	24%	33%	11%	13%	8%	9%	11
Google+	19%	21%	15%	24%	8%	13%	13%	15
Snapchat	16%	37%	25%	28%	3%	3%	5%	7
Pinterest	12%	14%	16%	23%	14%	20%	13%	18
Tumblr	6%	15%	24%	6%	18%	11%	22%	19

# Time spent on social networking sites

## Average time spent per visit – Trends



Base: Users of social media (533) Q. And roughly how long would you spend each time you use Facebook/LinkedIn/Twitter?



# Users' views on time spent on social networking

On balance, Australians were more likely to feel that they had increased the time they spent on social networking compared to last year rather than decreased, but the majority felt they were spending about the same amount of time as they had previously. Overall almost two in three felt that the time they spent on social networking was about right, but three in ten felt they spent too much time on it. Most were expecting to spend the same amount of time in the coming year, however slightly more were looking to decrease than increase the time they spent on social media.

## Change in time spent social networking over the past year

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Increased	28%	26%	30%	25%	37%	29%	22%	25%	28%
Decreased	15%	14%	16%	23%	21%	13%	12%	12%	6%
About the same	56%	60%	53%	52%	41%	56%	66%	63%	65%

## Perception of time spent social networking

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
About right	64%	72%	58%	55%	57%	61%	65%	72%	90%
Too much	31%	23%	38%	41%	39%	33%	33%	19%	6%
Not enough	4%	4%	4%	3%	2%	5%	2%	9%	2%

## Expectations for time spent social networking

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Increase	13%	12%	14%	13%	11%	13%	15%	14%	12%
Decrease	16%	14%	17%	25%	20%	16%	8%	16%	3%
About the same	71%	73%	69%	62%	67%	68%	77%	70%	84%

**Base: Users of social media (533)** Q. Compared to last year, have you increased, decreased or spent about the same amount of time using social networking sites? Q. When you think about the amount of time you currently spend on social networking sites, do you feel it is? Q. And looking at the next twelve months, compared to the last year, do you think you will be increasing, decreasing or spending around the same amount of time using social networking sites?

# Number of friends, contacts or followers

Across all social networking users, the average number of friends, contact or followers in 2014 was 328, an increase of 70 on average over the past year. Over half of all social media users report having more than 100 contacts in their network. Females reported significantly more contacts than males, but the big difference was across age groups varying from the low of 88 for the 65+ (which has still more than doubled in the past year) to a high of 511 for the 14-19 year olds (up from 453 last year).

Whilst most demographics increased the number of friends and contacts, those demographics that “rationalised” their friends and contacts over the last year included males (down 16) and those in their 40s (down 32). Residents of South Australia reported the greatest number of friends at 515, with friends increasing in most states and territories. Only those in Western Australia, Tasmania and the Australian Capital Territory reported fewer friends and contacts in 2014.

## Number of friends, contacts or followers

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Up to 20	12%	13%	12%	3%	0%	9%	10%	34%	33%
21 to 50	17%	18%	16%	3%	10%	15%	25%	23%	33%
51 to 100	18%	16%	20%	9%	5%	25%	23%	16%	17%
101 to 200	21%	20%	21%	25%	23%	26%	22%	11%	9%
Over 200	32%	32%	31%	59%	52%	25%	20%	15%	8%
Average	328	288	362	511	489	284	218	261	88

## Average number of friends, contacts or followers – Trends

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Average 2011	217	209	224	353	257	209	127	155	117
Average 2012	227	246	211	464	338	212	115	76	64
Average 2013	258	304	221	453	366	200	250	146	48
Average 2014	328	288	362	511	489	284	218	261	88

# Number of friends, contacts or followers

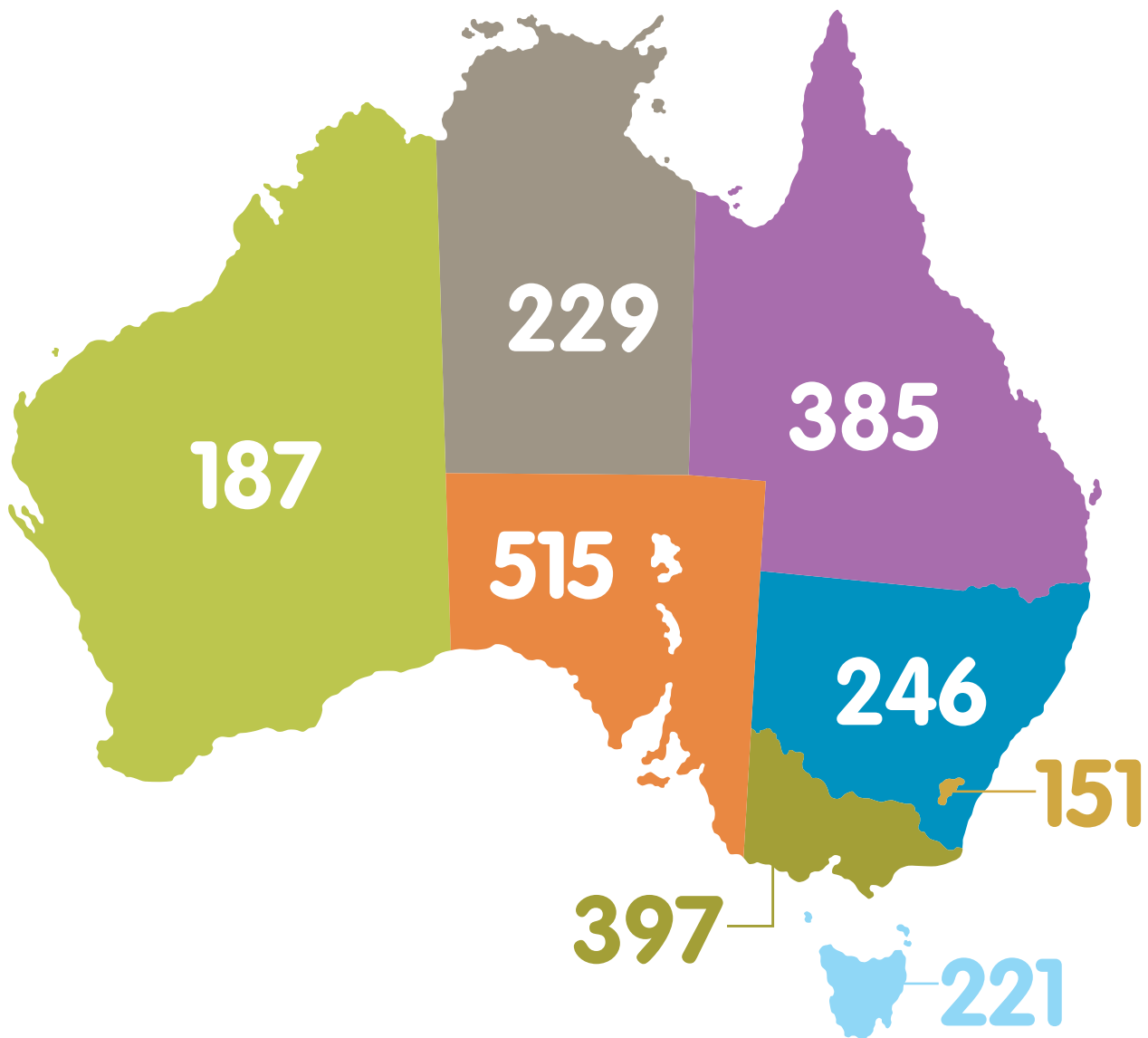
(age, gender and location)

## Average number of friends, contacts or followers by age



# Number of friends, contacts or followers by location

Average number of friends, followers or contacts by location



Total  
**328**

Metropolitan  
**350**

Regional  
**279**

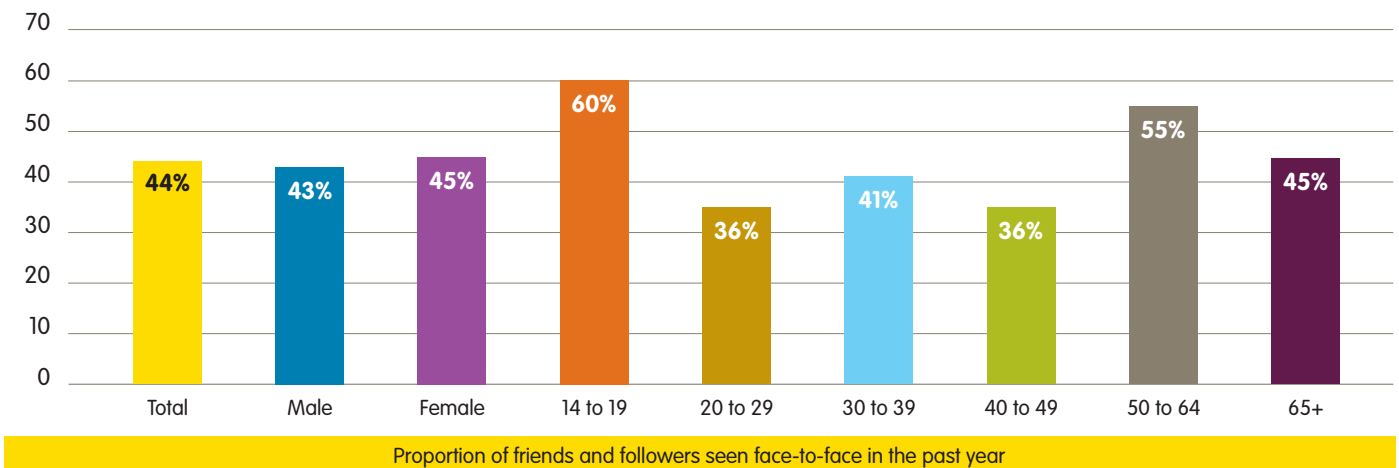
# Percentage of friends, contacts or followers seen face-to-face in the past year

(age, gender and location)

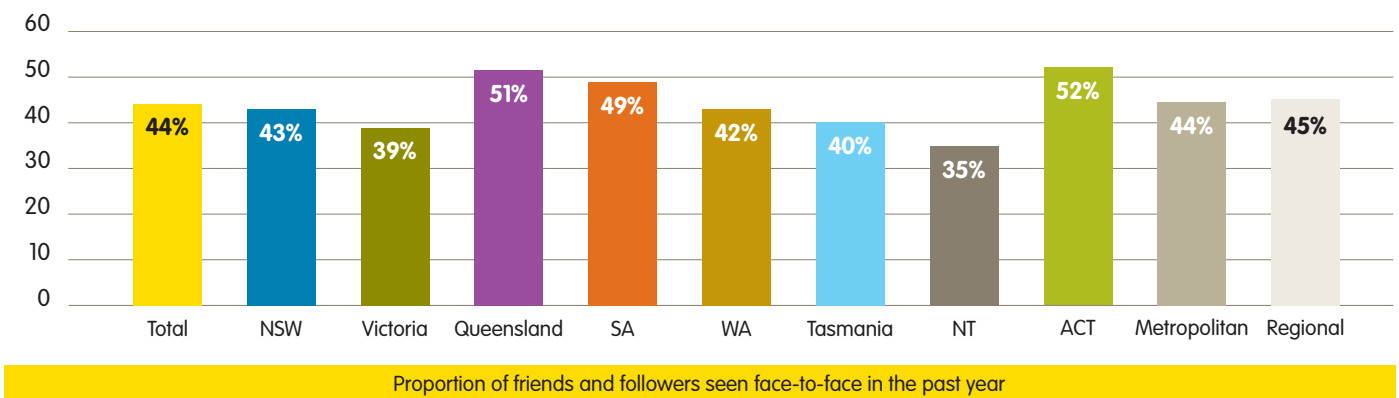
While Australian social media users have, on average, 328 friends and followers, they have seen less than half of them face to face in the past year, with the proportion having fallen over the past year from 47% to 44%. Females were slightly more likely to have seen their virtual contacts in person in the past year. It was the youngest social media users that were most likely to have seen their social media contacts in real life in the past year, with 60% of those aged 14-19 most likely to have seen their social media contacts in person, but even this has fallen from 65% last year for this age group. Residents of the Australian Capital Territory were the most likely to have seen their social media friends in real life in the past year.

Some 6% of Australians reported having a social media presence for an identity that was not their own, with no significant changes in this proportion in the past year. Mostly these were children (2%), however 1% each reported having a social media presence for a business or a club.

## Percentage of friends, contacts or followers seen face-to-face in the past year by age and gender



## Percentage of friends, contacts or followers seen face-to-face in the past year by location

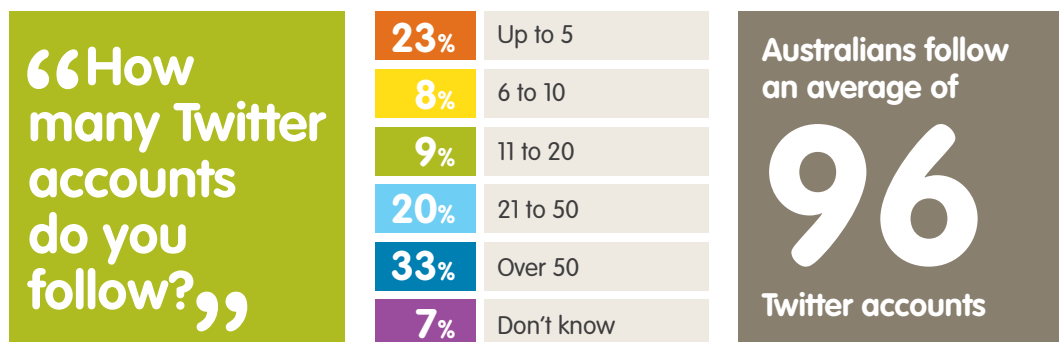


Base: Users of social media (533) Q. What percentage of your social networking contacts would you have seen in person over the past twelve months?

# Number of Twitter accounts followed

On average, Twitter users follow 96 accounts, down from 116 accounts in 2013, 83 accounts in 2012 and 35 accounts in 2011. Over three in ten (31%) of Twitter users do not tweet at all, an increase from 24% last year, with one in three tweeting less than once a week, compared to the 10% that tweet at least once a day.

## Number of Twitter accounts followed

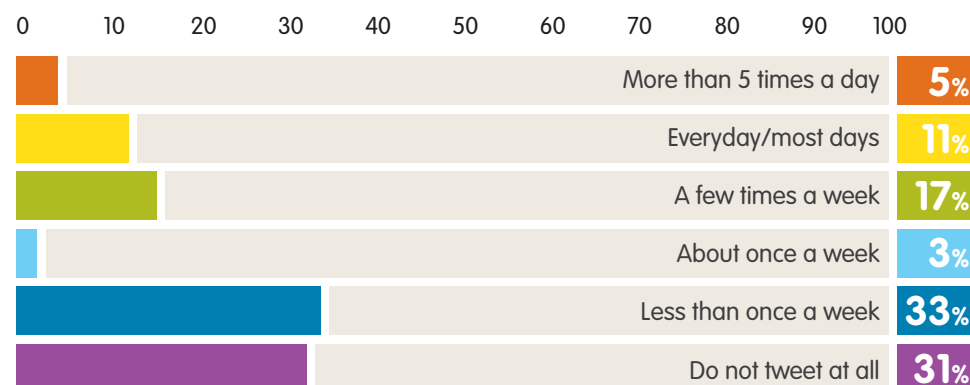


Base: Users of Twitter (88) Q. Approximately how many Twitter accounts do you follow?

## Number of Twitter accounts followed – Trends



## How often do you tweet on average?









Base: Users of Twitter (88) Q. How often do you tweet on average?

# Devices and applications used to access social media

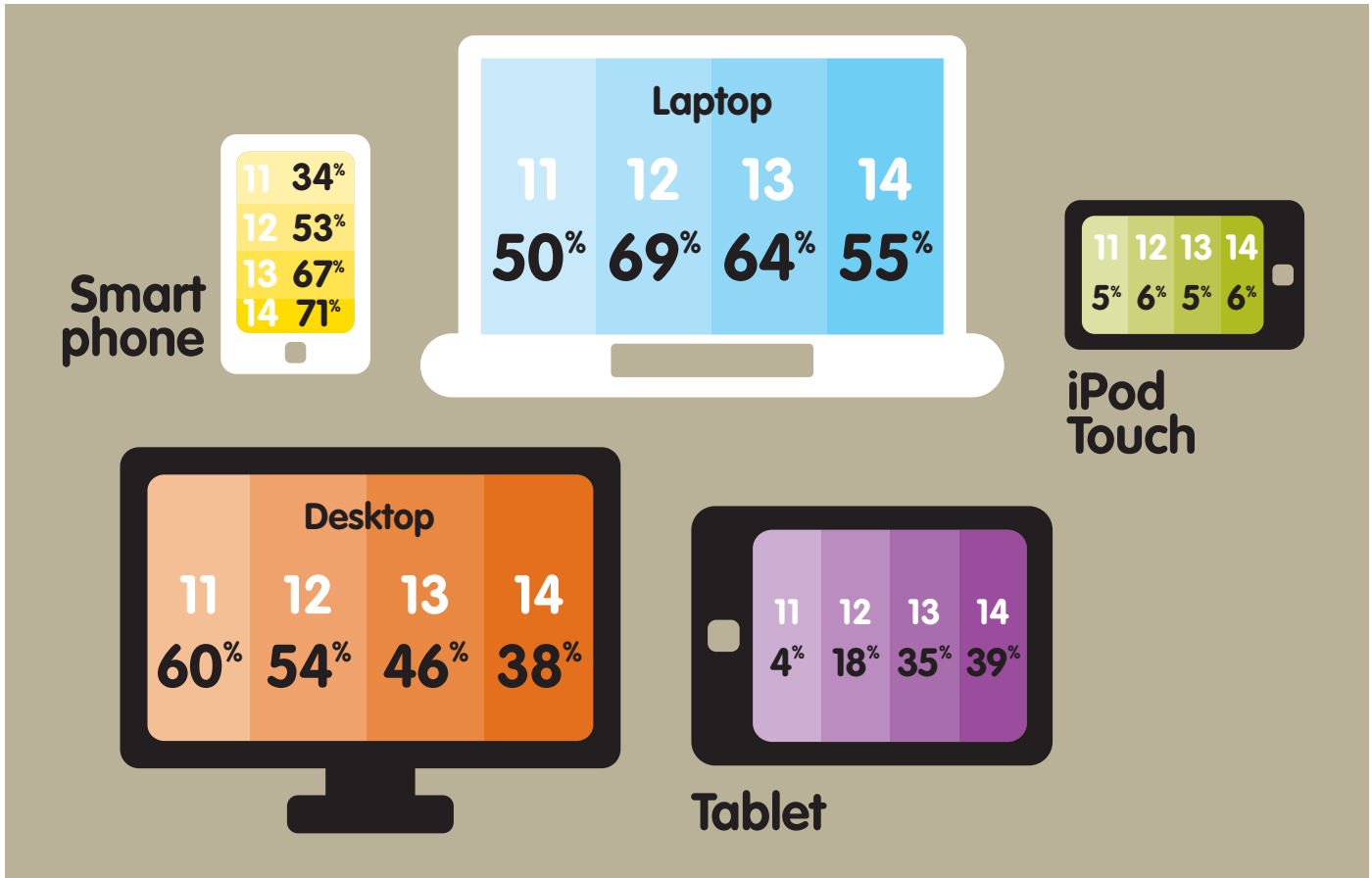
Mobile devices entrenched their position as the favoured device for social networking, with smartphones remaining the most popular device type for social media, and tablet usage also growing. In the past year, the proportion of social media users accessing social media on their smartphones rose from 67% to 71% while tablet usage also grew strongly from 35% last year to 39%. Computer-based social networking continued to fall this year, with the proportion accessing it on a laptop computer down from 64% last year to 55% this year. Using a desktop computer to access social media also fell from 46% last year to 38% this year. Mobile devices were the most popular in every age category under 65. For those aged 50 to 64, tablets were the most popular device. For those aged 65 years and above, desktop computers followed by laptop computers were the most popular social networking tool.

For those Australians that access social media on mobile devices, accessing through the social media platform's mobile application was the most popular means of access, with 70% of users using the app, compared to only 20% that used the website and 10% that used both the app and the website to access their social media platforms. There was almost no change in these proportions in the past year.

## Devices used to access social media by age and gender

Devices used to access social media	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Smartphone 	71%	71%	71%	84%	87%	73%	70%	53%	39%
Laptop computer 	55%	58%	53%	57%	64%	48%	54%	52%	54%
Tablet 	39%	35%	43%	21%	36%	34%	53%	54%	26%
Desktop computer 	38%	39%	38%	9%	33%	38%	47%	48%	60%
iPod Touch 	6%	7%	6%	20%	1%	2%	8%	8%	0%
Internet-enabled TV 	2%	4%	0%	0%	2%	1%	3%	0%	0%

# Devices and applications used to access social media



Base: Users of social media (533) Q. What devices do you use to access social network sites?

## How mobile users access social media

How mobile users access social media	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
App	70%	70%	70%	85%	80%	73%	64%	52%	46%
Website	20%	19%	21%	9%	8%	14%	32%	42%	17%
Both	10%	11%	9%	6%	11%	13%	4%	6%	37%

Base: Users of social media on mobile devices (412) Q. What devices do you use to access social network sites?

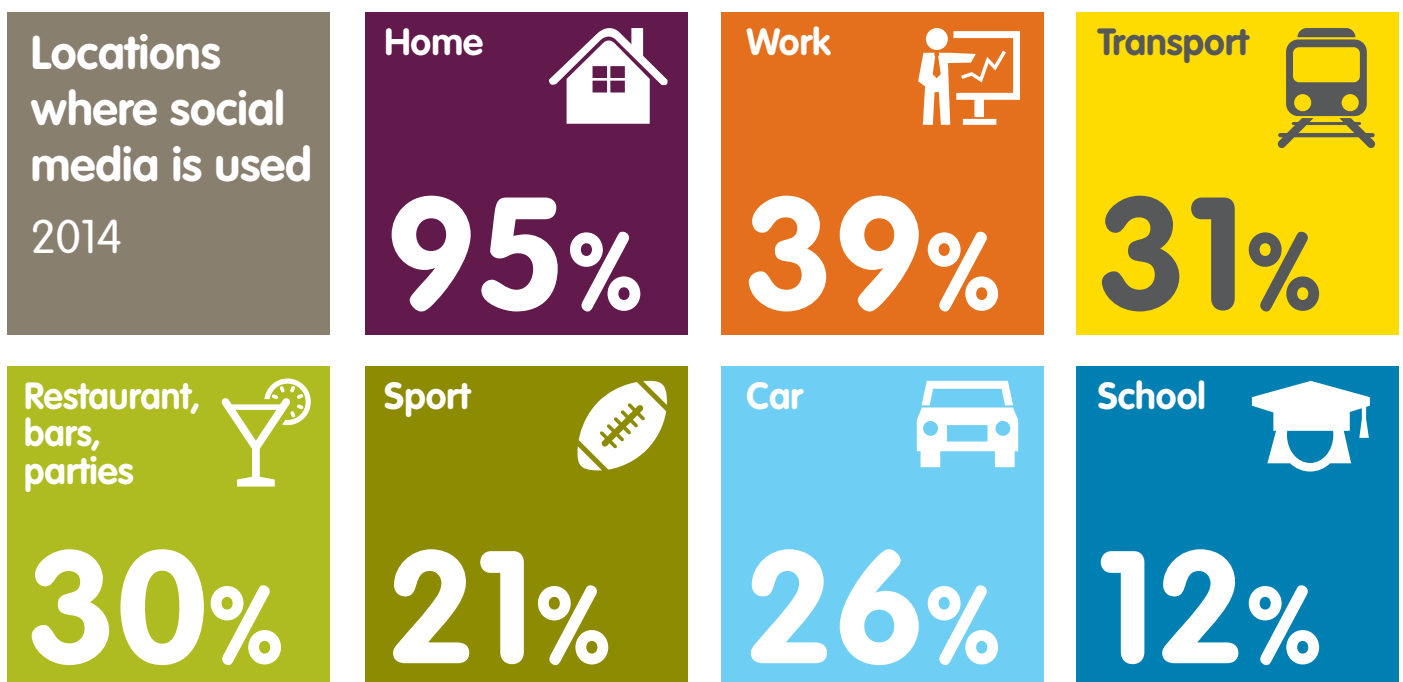


# Where are social networking sites used?

Most Australians (95%) access social media at home, most often in the living room, and frequently in the bedroom and study. Accessing social media in the home has been relatively stable at a near saturation level in recent years, however growth has been seen in the proportion accessing social media at other locations. Some 39% of users access sites at work, up from 34% in 2013. Increases were also seen in the proportion of social media users that access social media in restaurants, bars and parties, at sporting events and in the car.

With use in the home near universal it is interesting to look at which parts of the home people are using social media. The lounge or living room was the most frequent room to access social media, however there has been an increase in intensity of use in all rooms in the past year. Males were 10 percentage points more likely to access social media in the bedroom than females, males were over three times as likely to report accessing social media in the toilet (17% for males, compared to 5% for females).

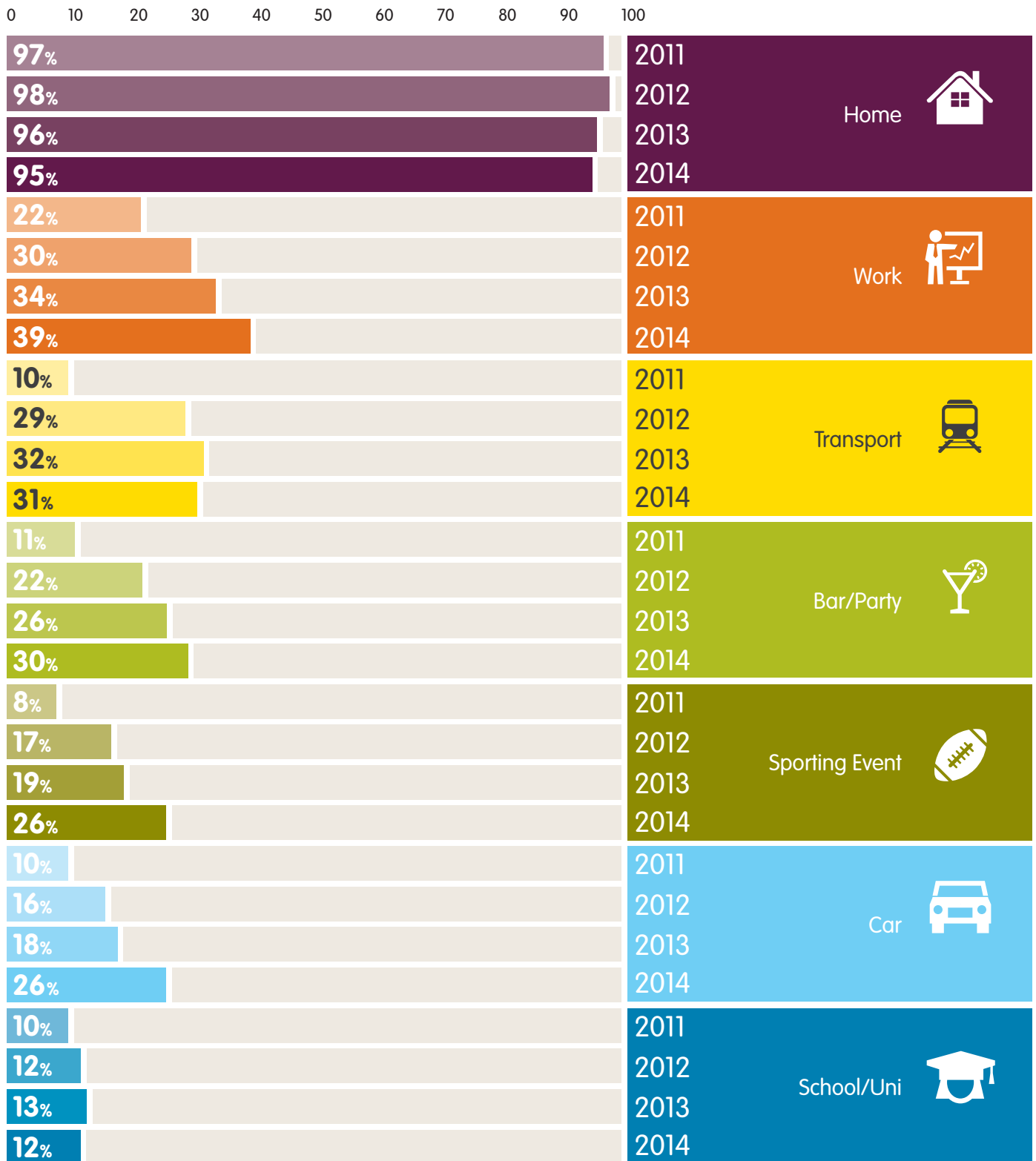
## Locations where social media is used



# Where are social networking sites used?

(trends)








## Places where social media is used










# Where are social networking sites used?

(age, gender and location)

## Locations where social media is used by gender and age

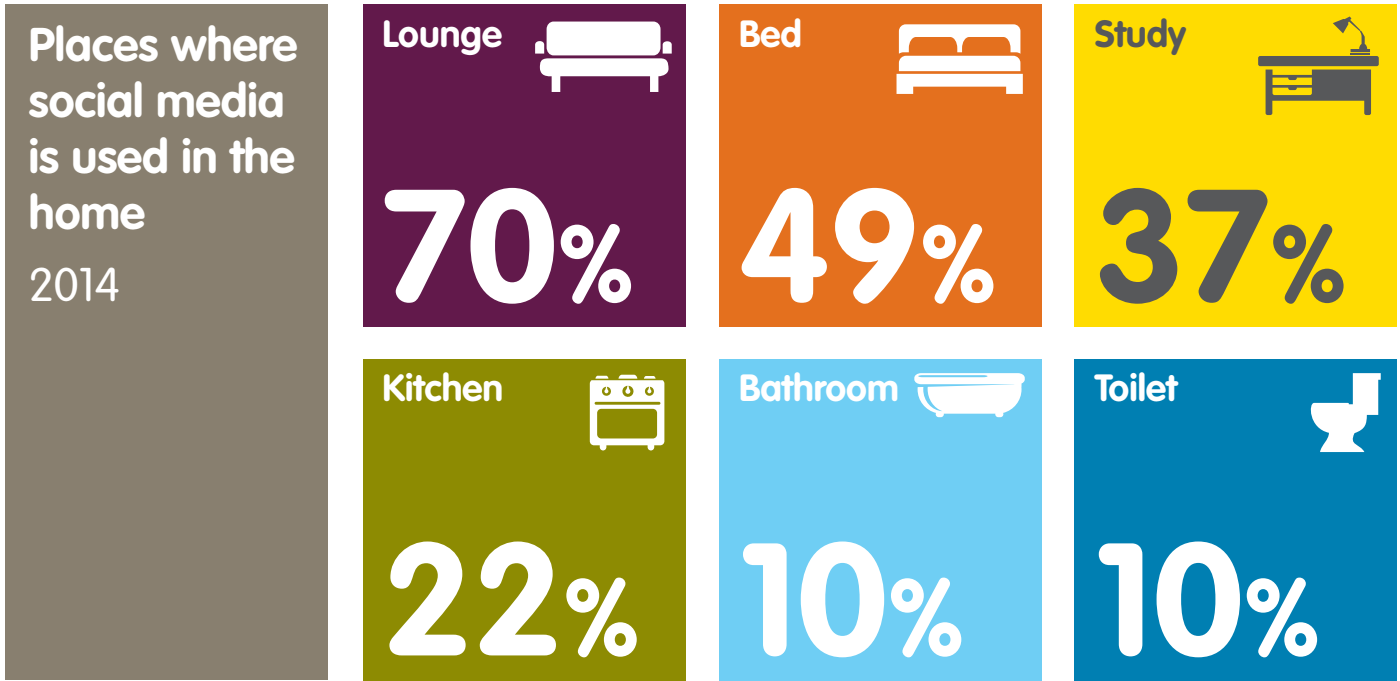
Locations where social media is used	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
At home 	91%	98%	98%	93%	93%	95%	96%	100%
At work 	45%	33%	16%	50%	49%	45%	34%	8%
On public transport 	32%	30%	45%	48%	33%	31%	7%	5%
Restaurants, bars, parties 	29%	30%	33%	43%	30%	25%	15%	6%
In the car 	20%	31%	47%	28%	38%	29%	7%	3%
At sporting events 	18%	23%	15%	27%	30%	25%	9%	0%
At school or college 	11%	14%	43%	17%	31%	6%	1%	0%

## Locations where social media is used by location

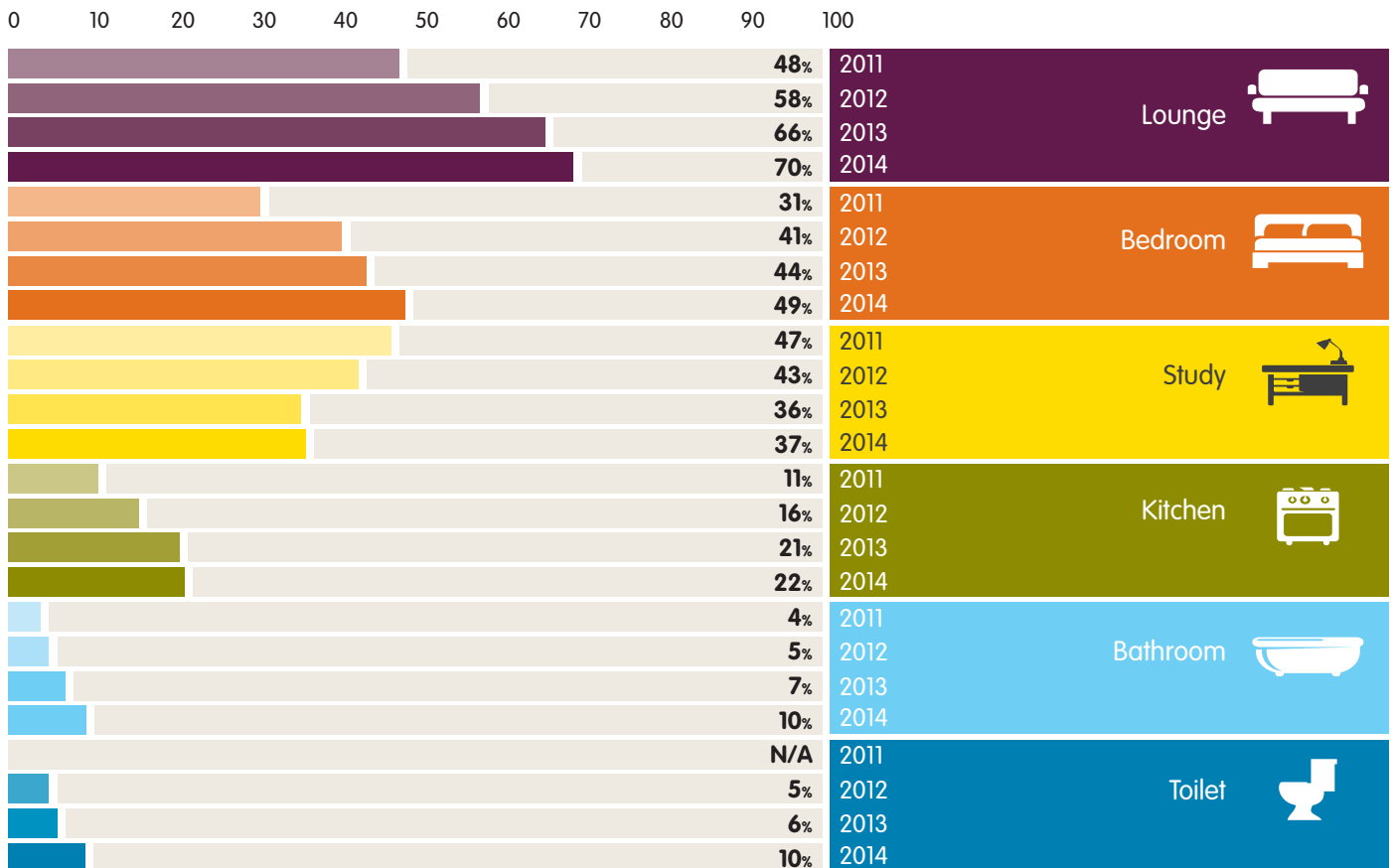
Locations where social media is used	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
At home 	96%	93%	93%	95%	97%	99%	97%	89%	93%	98%
At work 	36%	47%	39%	42%	23%	37%	28%	45%	38%	40%
On public transport 	32%	35%	29%	32%	27%	16%	18%	13%	31%	31%
Restaurants, bars, parties 	35%	33%	23%	32%	21%	28%	21%	17%	29%	30%
In the car 	23%	35%	21%	28%	24%	25%	19%	10%	24%	30%
At sporting events 	15%	28%	25%	17%	18%	32%	7%	7%	18%	28%
At school or college 	7%	16%	13%	18%	13%	21%	5%	15%	13%	11%

Base: All social media users (533) Q. Where do you use social networking sites – either on your computer or mobile device?

# Places where social media is used in the home









Places where social media is used in the home – Trends









# Places where social media is used in the home

(age, gender and location)

## Places where social media is used in the home by gender and age

Places where social media is used in the home	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Lounge/ living room 	66%	73%	73%	66%	80%	71%	66%	54%
Bedroom 	48%	49%	79%	74%	50%	28%	30%	18%
Study 	40%	34%	27%	26%	48%	32%	42%	53%
Kitchen 	24%	21%	28%	22%	38%	23%	6%	6%
Bathroom 	16%	6%	21%	16%	19%	1%	0%	0%
Toilet 	17%	5%	18%	13%	18%	7%	0%	0%

## Places where social media is used in the home by location

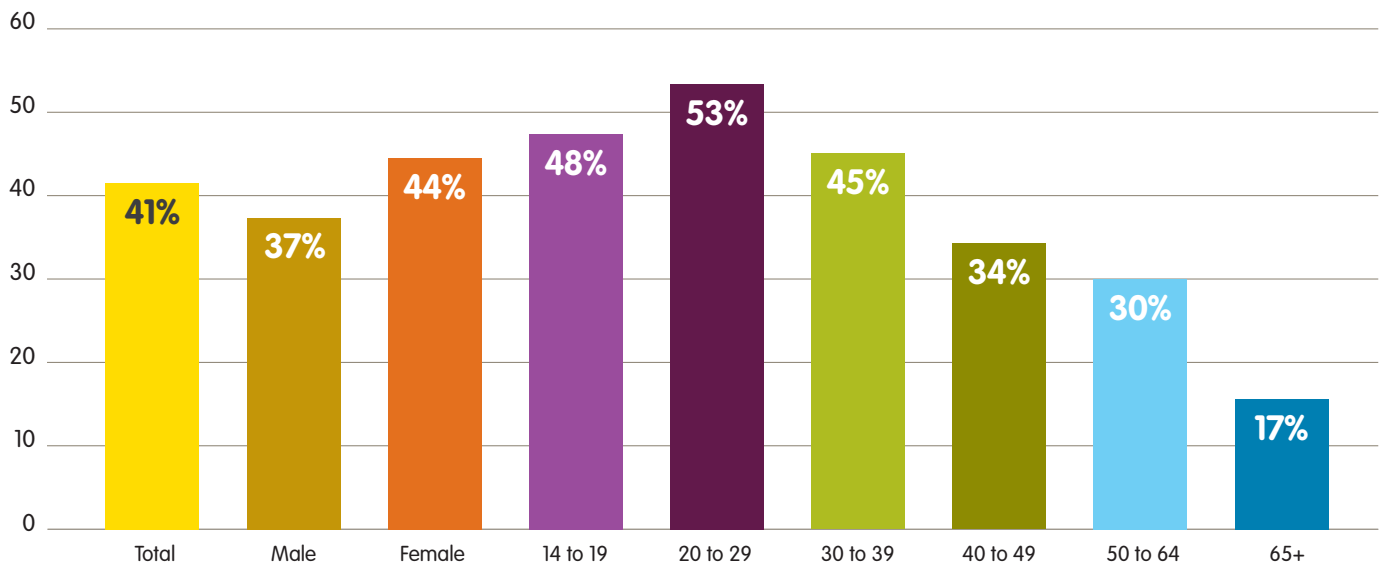
Places where social media is used in the home	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Lounge/ living room 	72%	74%	67%	69%	59%	66%	72%	87%	70%	69%
Bedroom 	57%	51%	44%	48%	32%	53%	33%	32%	52%	42%
Study 	50%	38%	23%	25%	41%	28%	24%	17%	40%	30%
Kitchen 	29%	23%	11%	30%	21%	23%	5%	19%	22%	23%
Bathroom 	20%	9%	4%	7%	2%	6%	1%	8%	11%	9%
Toilet 	19%	9%	5%	6%	2%	2%	6%	8%	10%	11%

Base: Users of social media sites at home (506) Q. Where would you normally use these sites at home? In which rooms of the house?

# TV and social networking

Over four in ten social media users reported using social media while watching television, however there was a marginal decline of one percentage point over the past year, mainly caused by a decrease in this activity by females and younger age groups, which was only partially balanced by increased activity by older age demographics. News and current affairs was most popular genre for social networking, having increased from 37% last year to 44% this year, and pipping dramas for first position. Almost three in ten of those that used social media while watching television reported discussing the programs on social media while they were on, and less than one in ten reported that it decreased their enjoyment of the program, with most saying that it either had no impact or increased their enjoyment.

## Proportion that use social media while watching TV



Proportion that use social media while watching TV

Base: All social media users (533) Q. Do you use social media when you watch TV?

**41%**

of social media users use social media while watching TV

**31%**

use social media while watching reality TV

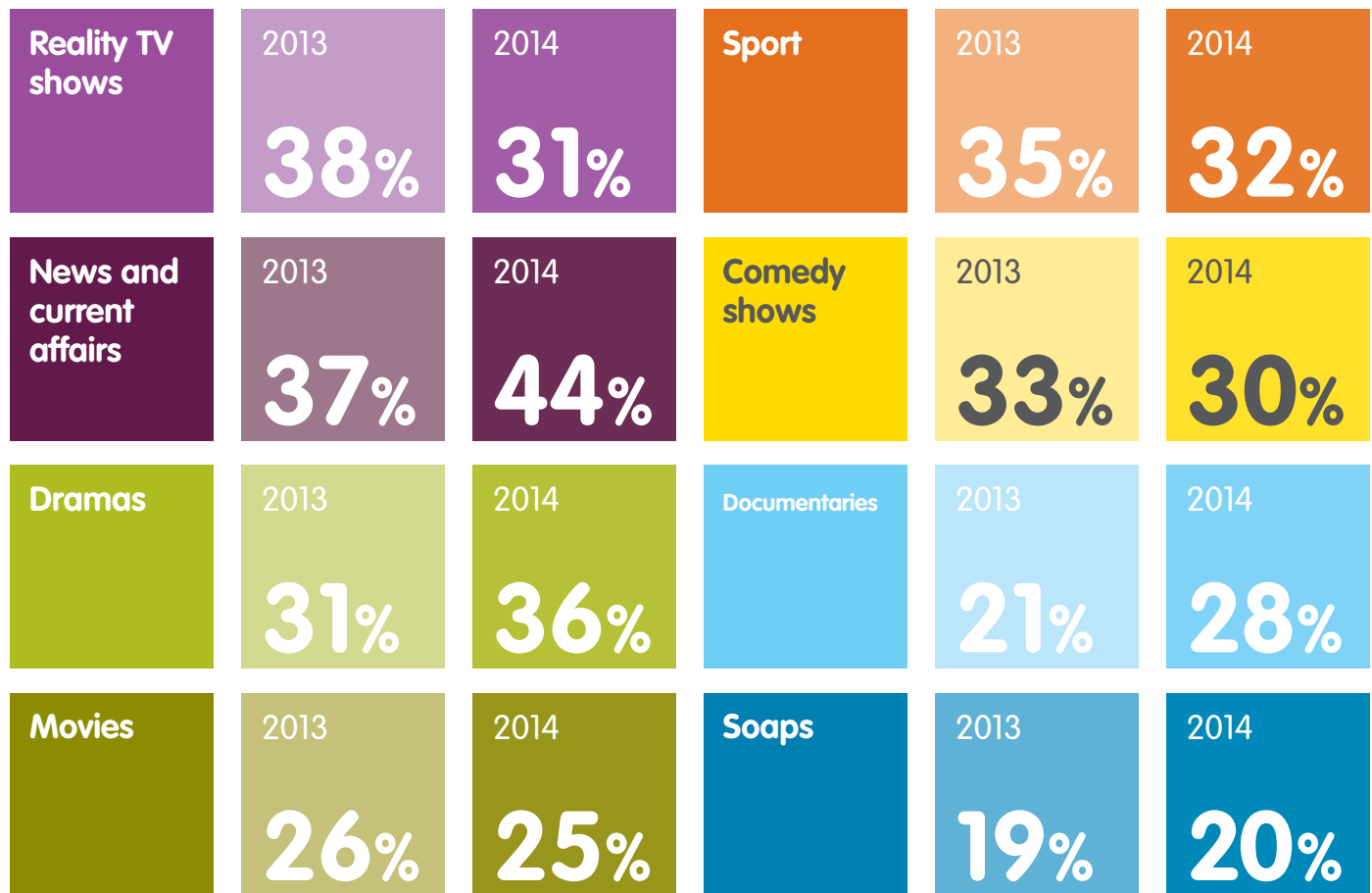
**41%**

said it increased their enjoyment of the show

# TV and social media use

(genre)

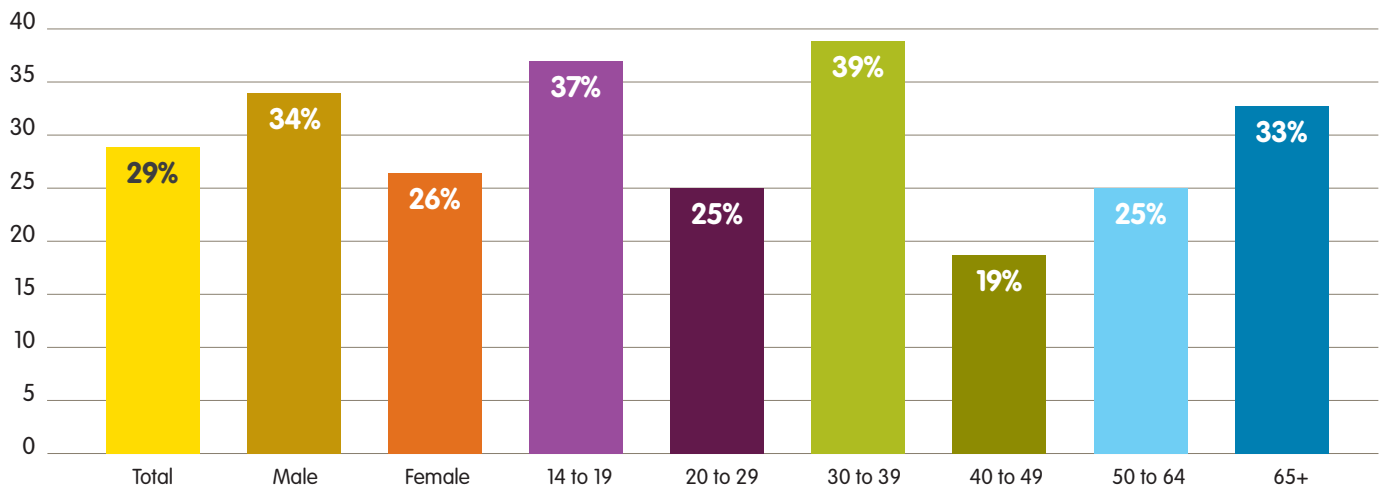
## TV genres favoured while social media networking



# TV and social media use

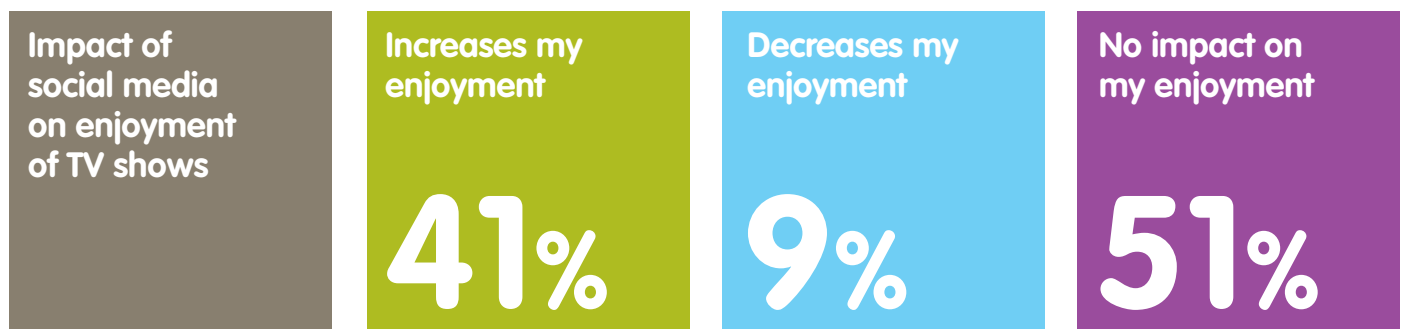
(age and gender)

## Who discusses TV programs on social media while watching?



Who discusses TV program on social media while watching it

## Impact of discussing television programs on social media on enjoyment



**Base: Users of social media while watching TV (219)** Q. Which types of shows do you mainly use social media whilst watching? Q. Do you discuss TV on social media during the program? Q. Does discussing a TV program on social media during the program change your enjoyment of the program?



# Reasons for using social networking sites

Along with the increases in usage overall, there were also increases in all reasons nominated for usage in the past year. The most common use of social networking sites remained 'catching up with friends or family'. Photo or video sharing remains the second highest use, while a high proportion also uses social media to find information on news and current affairs and coordinate shared activities. Using social media to research products or services you might want to buy and follow brands and businesses were the top commercial uses. On average, social media users nominated 5.1 different uses, up from 3.6 last year. The number of different uses of social media was highest for the younger age groups, with the number of different uses of social media tending to decline by age in general.

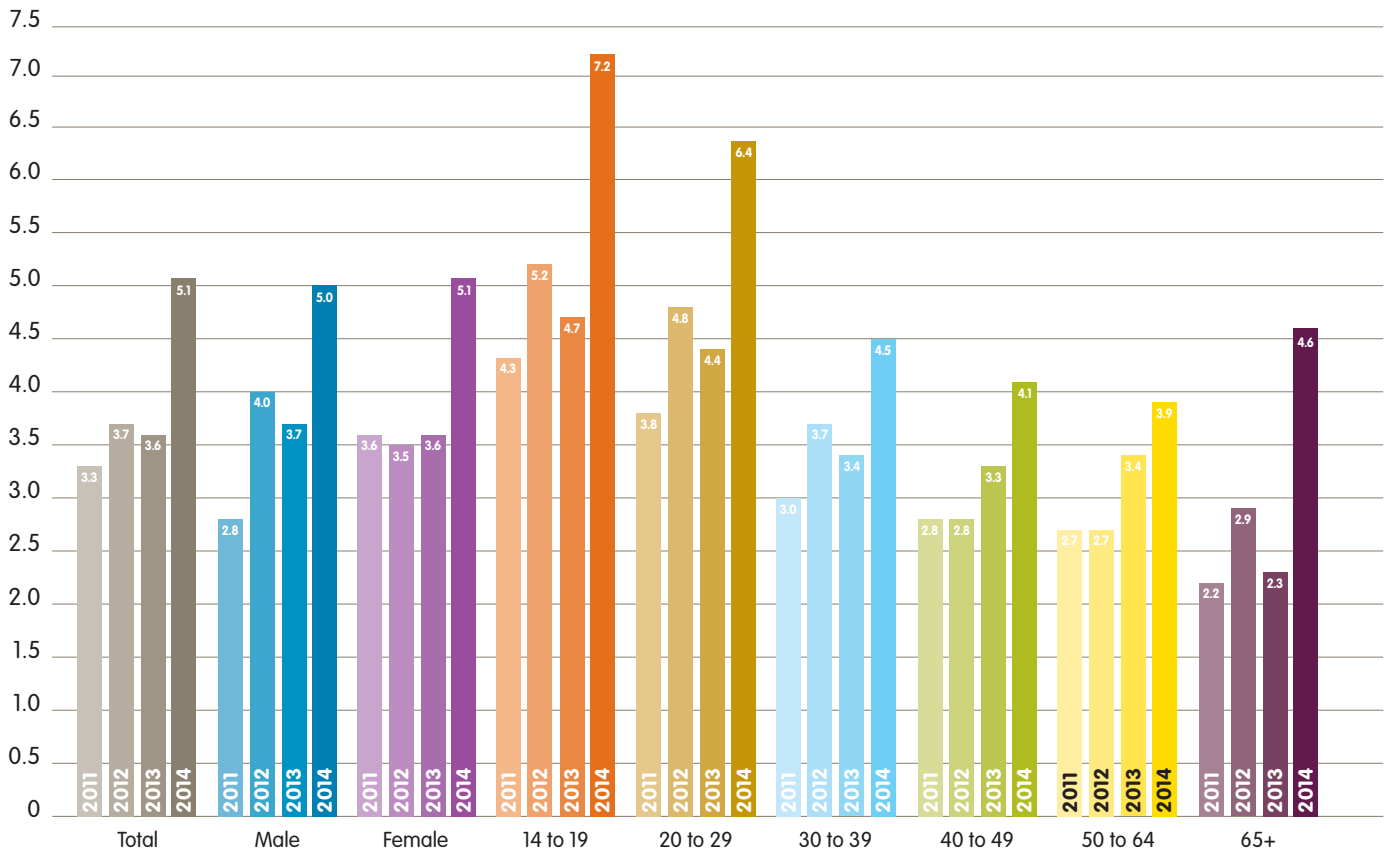
## Reasons for using social networking sites

Reasons for using social networking sites	2011	2012	2013	2014
To catch up with family and friends	93%	94%	94%	95%
To share photographs or videos	56%	51%	47%	64%
To get information on news and current events	N/A	27%	29%	47%
To co-ordinate parties or other shared activities	32%	33%	29%	33%
To follow or find out about particular brands or businesses in general	15%	22%	25%	32%
To find out about entertainment events	26%	23%	24%	32%
To follow particular brands to access offers/promotions	11%	18%	15%	29%
To research products/services you might want to buy	12%	16%	20%	28%
To research holiday destinations or travel offers	12%	13%	13%	26%
To play games	24%	18%	21%	26%
To find people with the same interests	14%	13%	14%	22%
To meet new friends	18%	14%	10%	20%
To provide reviews/write blogs about products you have bought	6%	6%	8%	15%
To follow celebrities	6%	9%	9%	12%
To engage with a government representative or department	5%	7%	6%	9%
To find potential dates	N/A	3%	5%	9%
Because of pressure from family/friends to use them	N/A	11%	7%	9%

# Reasons for using social media

(trends)

Average number of reasons people use social media



Average number of reasons people use social media

**Base: Users of social media (533)** Q. For what reasons do you use social networking sites? Remember, we are talking about sites such as Facebook or Twitter and not the Internet in general. For which of these reasons do you use these types of sites?

**95%**

use social media to catch up with family and friends

**26%**

use social media to play games

**28%**

use it to research products and services

# Reasons for using social media

(age and gender)

In the following table, we compare reasons for use across the genders and age groups. Females tend to nominate catching up with family and friends more frequently than males and were much more likely to nominate sharing photographs through social media – with males more likely to nominate finding people with the same interests, meeting new friends, finding potential dates and writing reviews. Younger age groups are also more likely to use social media to share photos, co-ordinate parties and activities, find out about entertainment events, follow celebrities and find potential dates.

## Reasons for using social networking sites by age and gender

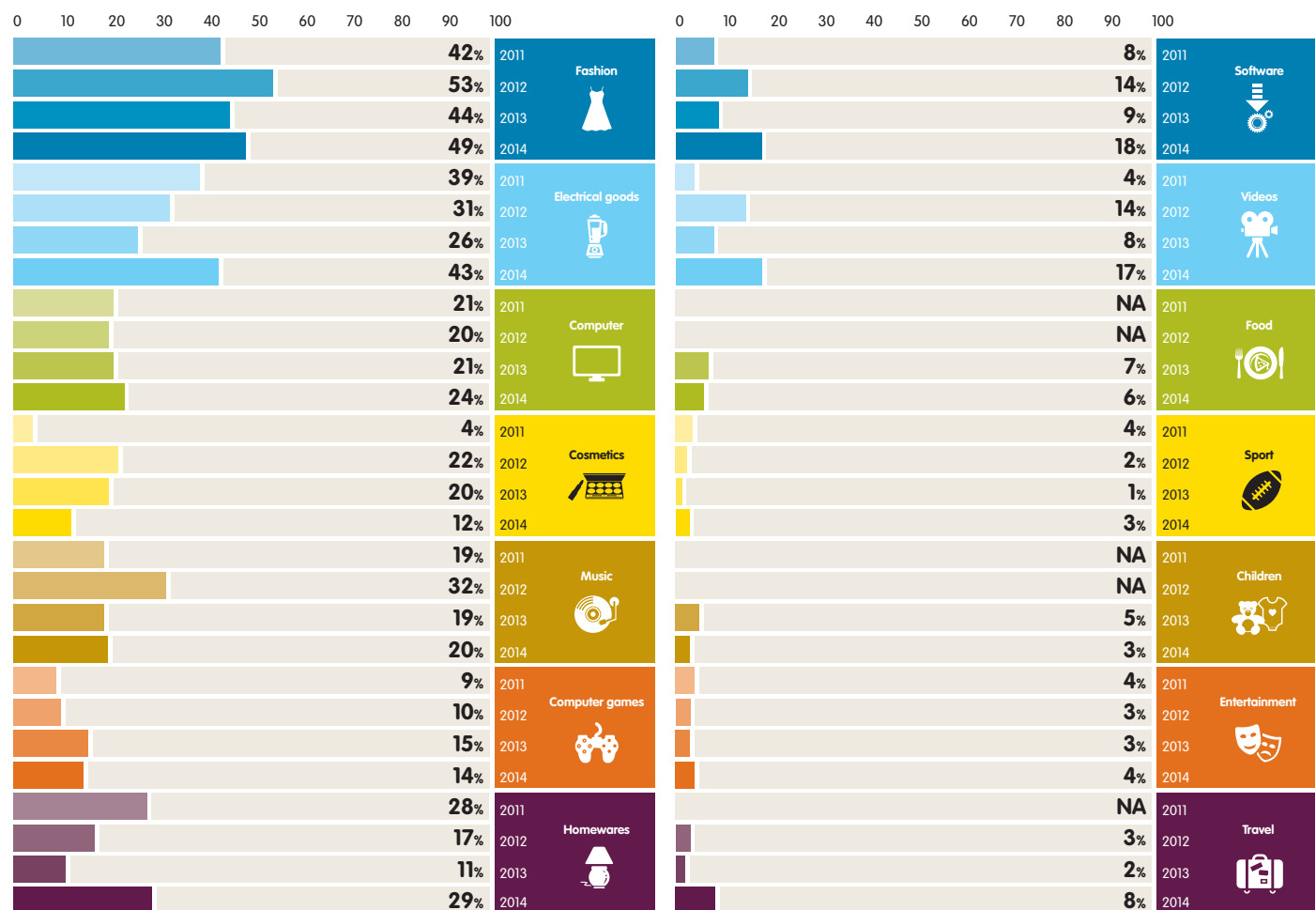
Reasons for using social networking sites	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
To catch up with family and friends	93%	96%	94%	98%	91%	96%	93%	98%
To share photographs or videos	55%	72%	76%	69%	56%	61%	63%	65%
To get information on news and current events	45%	48%	71%	45%	42%	47%	35%	50%
To co-ordinate parties or other shared activities	33%	34%	51%	63%	35%	17%	7%	15%
To follow or find out about particular brands or businesses in general	30%	34%	48%	46%	29%	24%	19%	30%
To find out about entertainment events	31%	32%	59%	42%	21%	24%	25%	21%
To follow particular brands to access offers/promotions	28%	30%	47%	43%	29%	21%	11%	23%
To research products/services you might want to buy	29%	27%	41%	36%	22%	23%	20%	28%
To research holiday destinations or travel offers	23%	28%	25%	29%	16%	25%	28%	40%
To play games	21%	29%	47%	33%	21%	18%	17%	17%
To find people with the same interests	29%	15%	30%	27%	24%	16%	14%	17%
To meet new friends	26%	15%	40%	30%	13%	9%	17%	10%
To provide reviews/write blogs about products you have bought	21%	11%	18%	26%	16%	8%	8%	15%
To follow celebrities	10%	14%	27%	17%	11%	8%	5%	3%
To engage with a Government representative or department	10%	9%	6%	9%	9%	6%	15%	15%
To find potential dates	11%	7%	28%	10%	3%	4%	7%	6%
Because of pressure from family/friends to use them	11%	7%	9%	14%	7%	4%	9%	6%

Base: Users of social media (533) Q. For what reasons do you use social networking sites? Remember, we are talking about sites such as Facebook or Twitter and not the Internet in general. For which of these reasons do you use these types of sites?

# Types of products or services researched on social networking sites

The overall growth in social media usage in the past year was also reflected in the proportion of Australians using social media to research products and services that they wanted to buy rising eight percentage points. The 28% who use social networking sites for researching products or services were asked which particular items they had looked for on social media sites. Fashion and electrical goods topped the list, followed by furniture and items for the home, computers and music.

## Products or services researched on social media

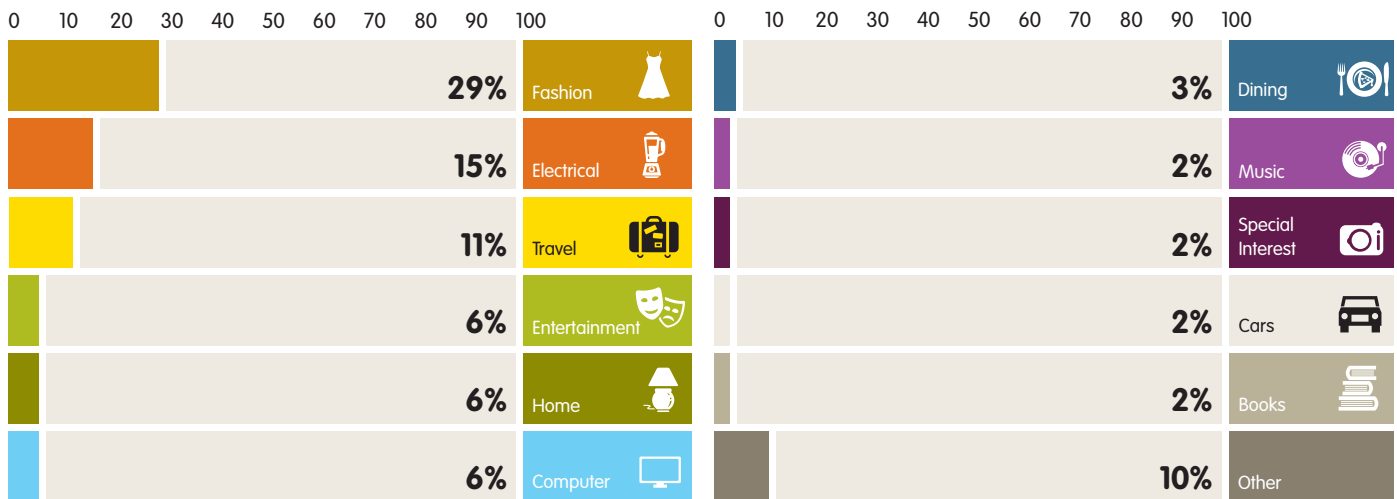


Base: Use social networking sites to research products or services (155) Q. You mentioned that you use social networking sites to research products or services you might want to buy? What types of products or services would you mainly look for?

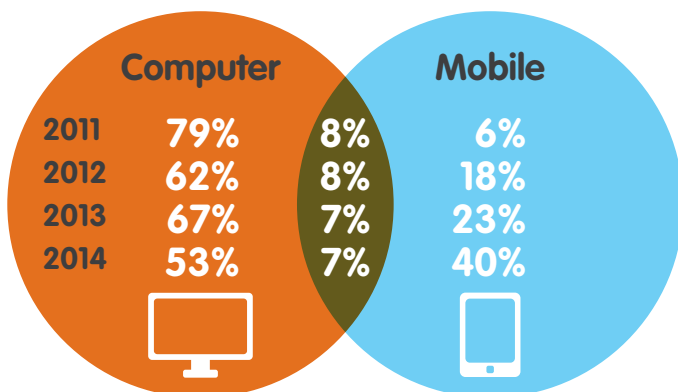
# Path to purchase

The research also looked at the last time people used social media to research something they wanted to buy and found that clothing, appliances and travel related products and services were most mentioned as the last search occasion on social networking sites. The biggest shift in purchasing behaviour was the increasing importance of mobile devices in the shopping equation. Some 53% of searches were solely conducted on a computer, down 14 percentage points in the past year, with 40% of searches conducted solely on a mobile device, up 17 percentage points. Some 7% searched using both of these options, unchanged in the past year. Overall some 63% of searches resulted in a purchase, of which 47% were made online. The proportion of research made on social networking sites that results in a purchase has been increasing steadily in recent years, from 36% in 2011, to 40% in 2012, to 58% last year and 63% this year.

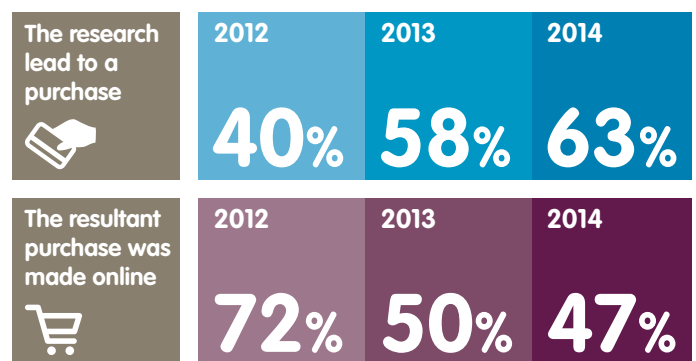
## What was looked for on last search occasion?



## How was that research conducted?



## Research on social media leading to a purchase



Base: Ever research products/services on social media (155) Q. Thinking about the last time you used social networking sites to research something you might want to buy, what type of product or service were you looking for? Q. Did you do that research on a computer or a mobile device? Q. Did that research lead to a purchase? Was that purchase made online?

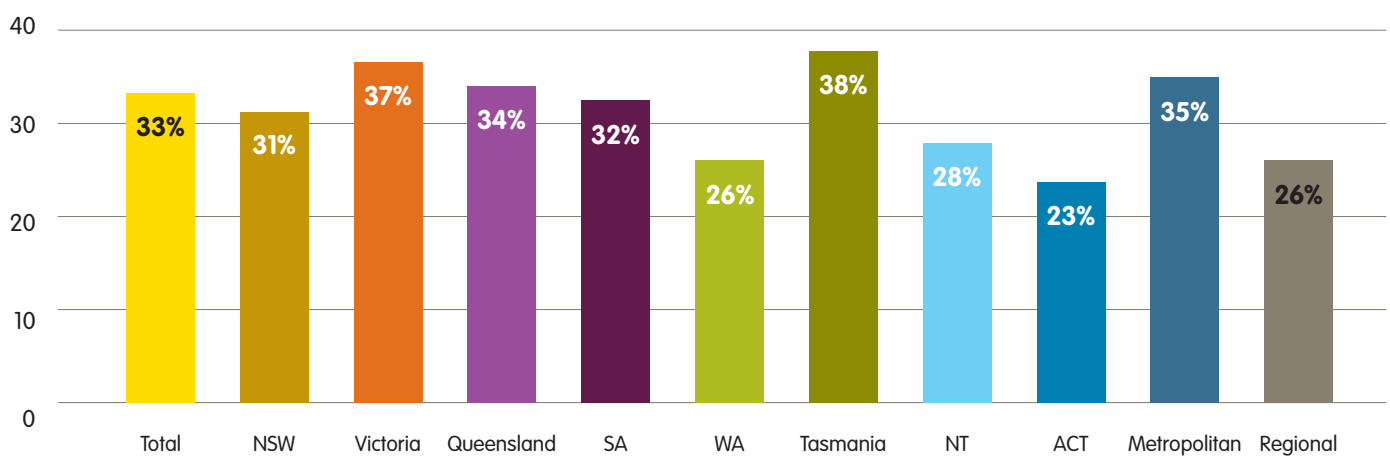
# Social media and brands

Some 33% of social networking site users follow social networking groups associated with businesses or brands, down marginally in the past year. Females were significantly more likely to follow brands than males, with the overall fall in brand following mainly reflecting a drop in male brand following. Those in their 20s and 30s are the most avid brand followers on social media. Metropolitan social media users were more likely to follow brands than those living in regional areas, with Tasmanian and Victorian social media users the biggest brand followers by state.

## Proportion that follow brands or businesses

	2011	2012	2013	2014
<b>Total</b>	<b>20%</b>	<b>25%</b>	<b>35%</b>	<b>33%</b>
Male	15%	25%	35%	27%
Female	23%	25%	36%	37%
14 to 19	30%	35%	63%	35%
20 to 29	20%	32%	42%	43%
30 to 39	23%	38%	31%	41%
40 to 49	8%	17%	31%	31%
50 to 64	22%	14%	23%	18%
65+	7%	17%	16%	11%

## Proportion that follow brands or businesses by location



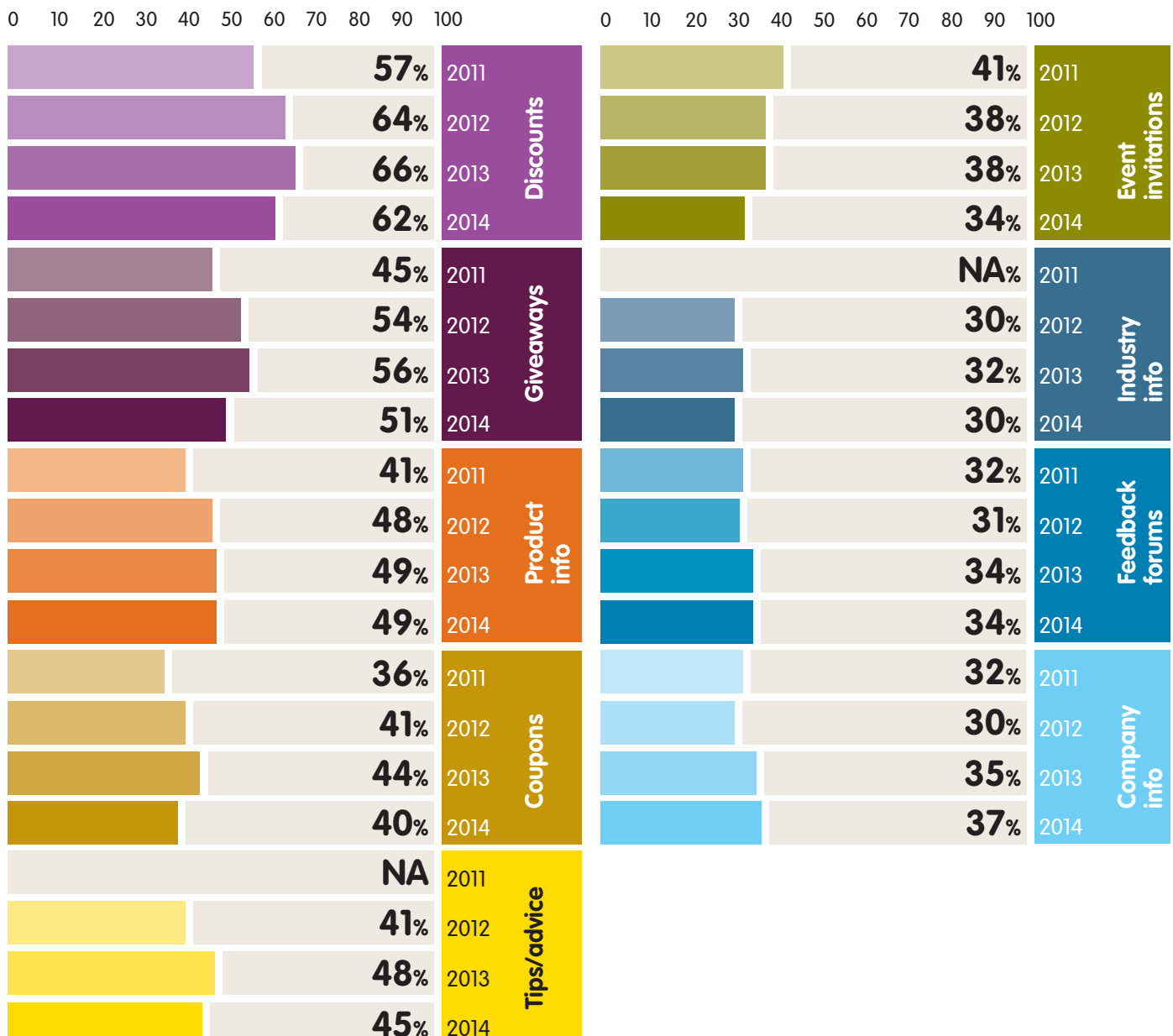
Follows a social networking group associated with a particular brand or business

Base: All social media networking users (533) Q. Do you follow any social networking group associated with any particular business or brand?

# What do consumers want from businesses or brands they follow?

Discounts are the most commonly sought after items required from businesses or brands followed on social networking sites, however there was a small decline in the proportion of consumers expecting them in the past year, with most other categories also falling. Giveaways, product information, tips/advice and coupons are also sought by a sizeable proportion of followers. Most categories saw a small fall or remained stable over the past year, with information about the company the only thing that more consumers reported wanting from businesses on social media over the past year.

## What do consumers want from businesses or brands that they follow?

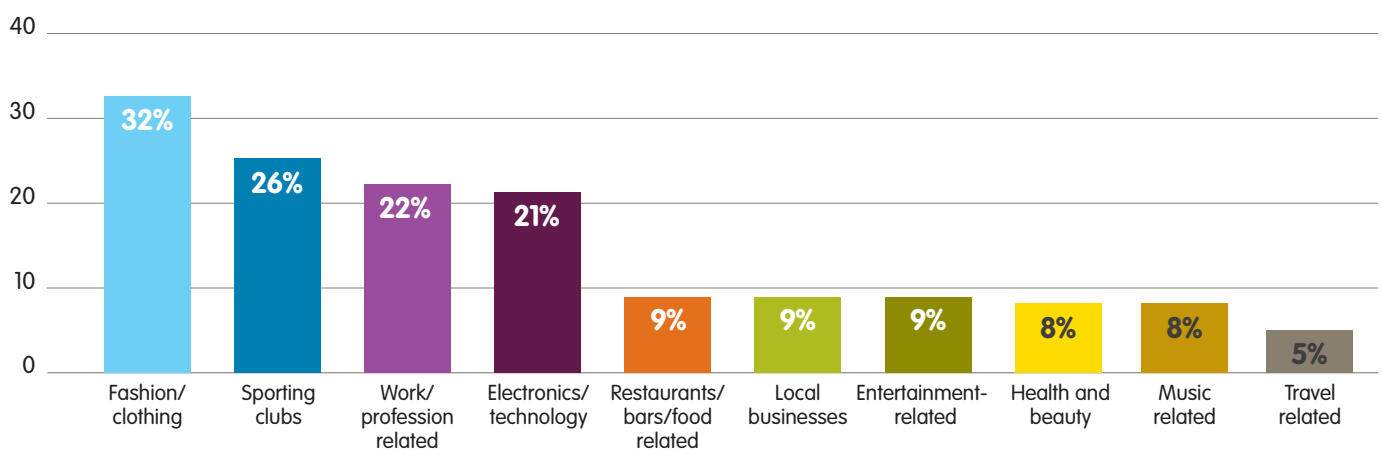


Base: Users of social media (533) Q. Which of these things would you like to get from businesses or brands you might follow on social media?

# Businesses and brands followed on Facebook and Twitter

Among the Facebook users in the sample, 31% follow brands or businesses on Facebook. The most commonly followed categories are fashion, sporting clubs and work-related sites. Following work-related and technology pages on Facebook saw the biggest increase in business following, with both rising eight percentage points in the past year.

## Types of brands/businesses followed on Facebook



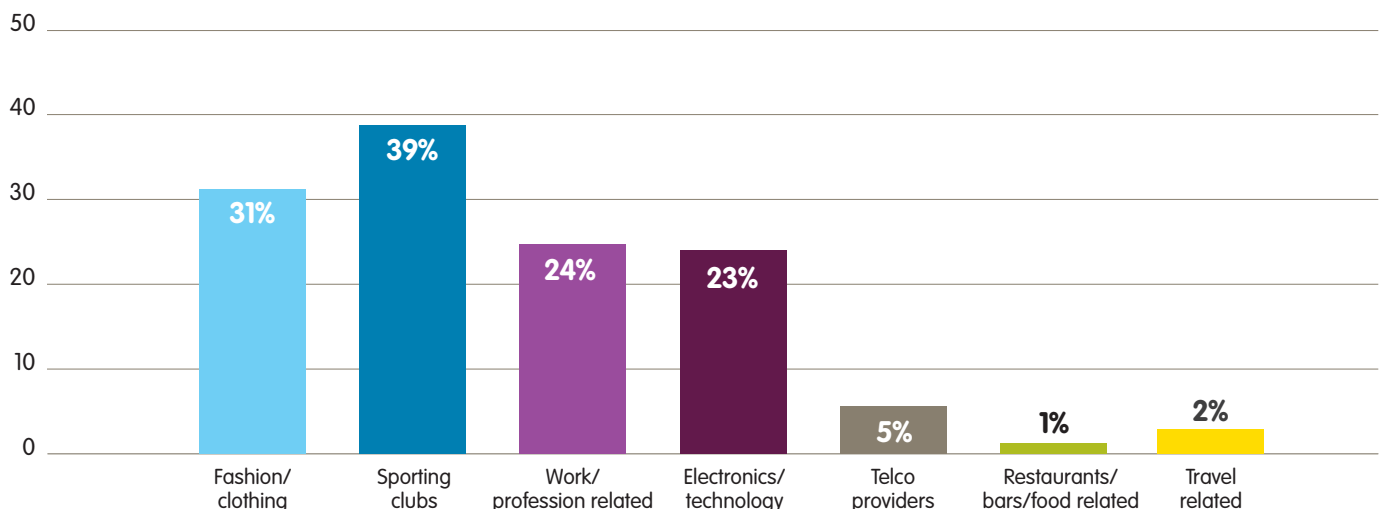
Types of brands/businesses followed on Facebook

All other responses less than 5%

Base: Use Facebook (507) Q. Do you follow any particular brand or businesses in Facebook? Q. What type of brands or businesses do you like to follow?

## Types of brands/businesses followed on Twitter

Among the Twitter users in the sample, 26% follow brands or businesses on Twitter. The most commonly followed categories are sporting clubs, fashion, work-related businesses, electronics and technology.



Types of brands/businesses followed on Twitter

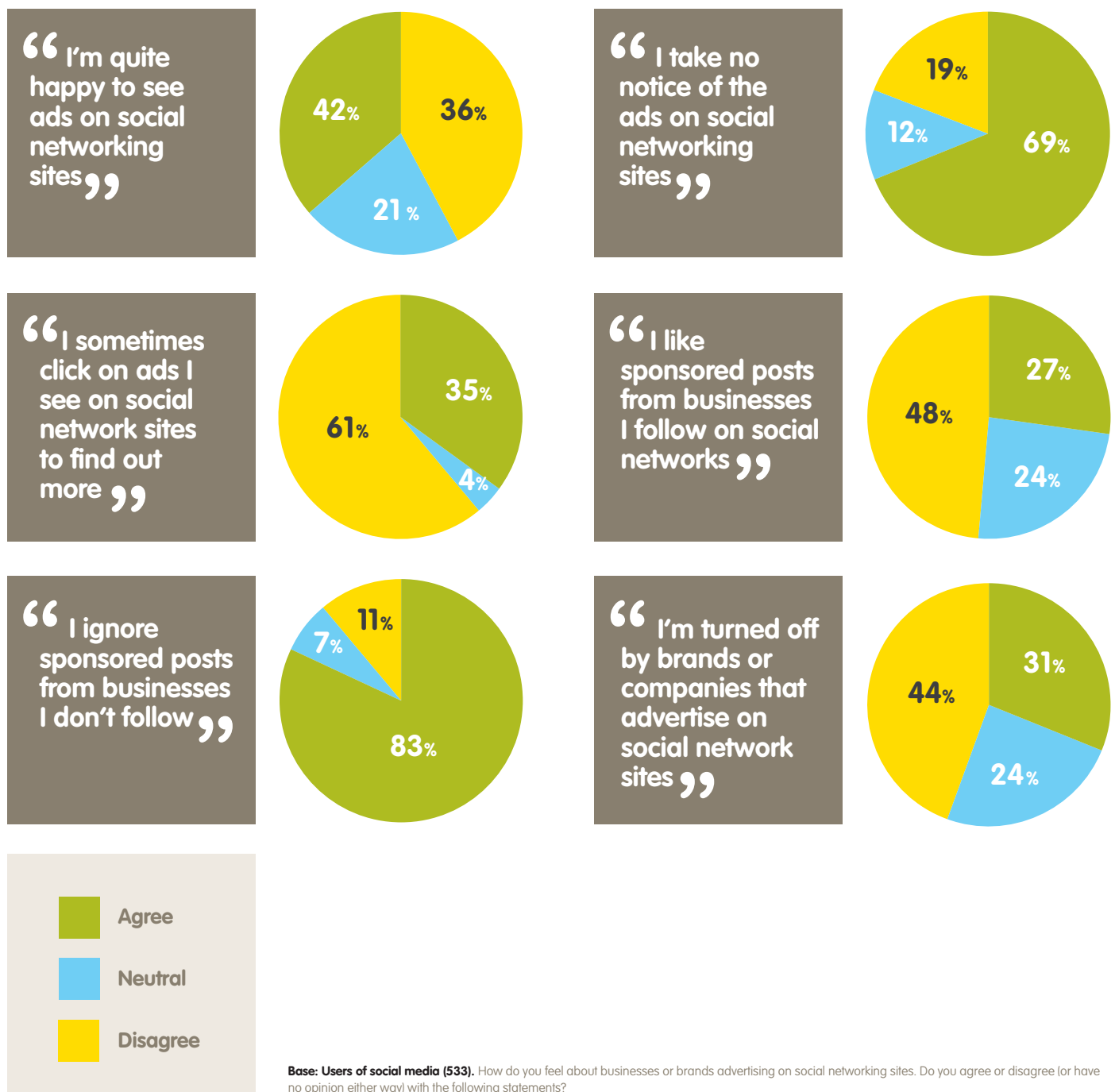
Base: Use Twitter (88) Q. Do you follow any particular brand or businesses in Twitter? Q. What type of brands or businesses do you like to follow?



# Advertising on social networking sites

While more are likely to agree than disagree that they are happy to see advertising on social networking sites, 69% claim to take no notice of ads they see, up from 57% last year. Some 35% sometimes click on ads to find out more, down marginally from 36% last year. While 83% of social media users ignore sponsored posts from businesses they don't follow, 27% report that they like sponsored posts from businesses they do follow.

## Attitudes towards advertising on social media network sites



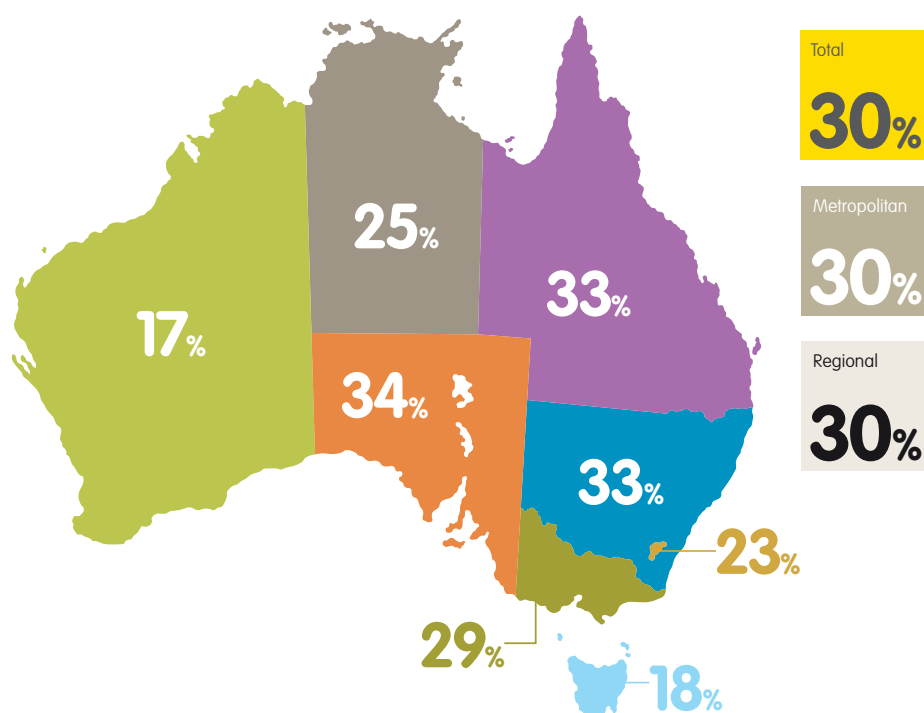
# Provision of online ratings

Overall, 30% of social media users have provided/provide online ratings, up five percentage points in the past year. On average, those who do provide ratings provided nine ratings in the previous year. Accommodation, restaurants/bars, holiday destinations, stores, movies and mobile apps were most commonly rated. Those aged 65 years and over were the most likely to provide online ratings, and were also the most prolific reviewers, completing on average 12 ratings a year.

## Proportion who have provided ratings and reviews online by age and gender

Proportion who have provided ratings and reviews online	2011	2012	2013	2014
<b>Total</b>	<b>27%</b>	<b>24%</b>	<b>25%</b>	<b>30%</b>
Male	28%	29%	29%	33%
Female	26%	19%	21%	27%
14 to 19	27%	22%	23%	21%
20 to 29	24%	28%	15%	32%
30 to 39	26%	22%	31%	28%
40 to 49	28%	18%	25%	28%
50 to 64	31%	27%	27%	34%
65+	24%	23%	27%	39%

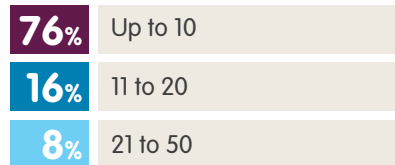
## Proportion who have provided ratings and reviews online



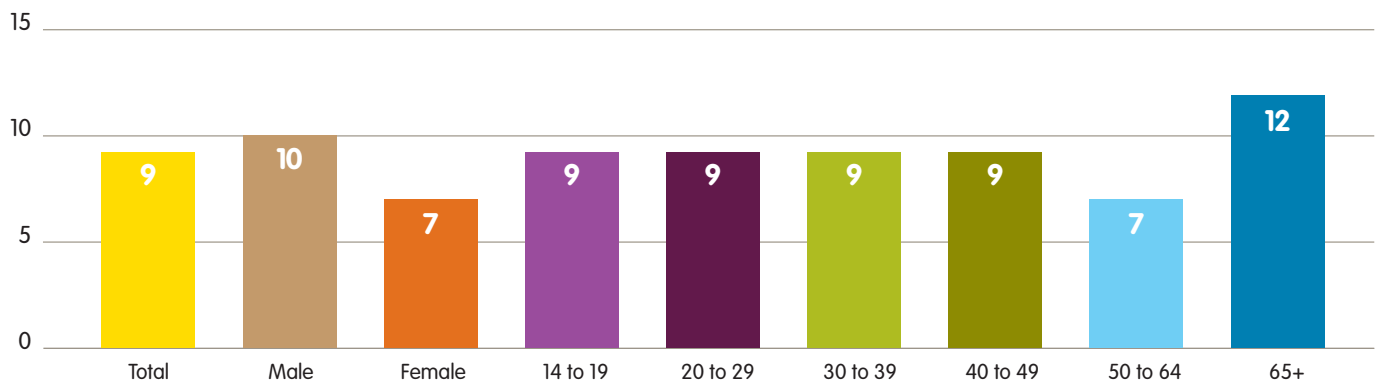
# Provision of online ratings

## Number of ratings provided last year

“ How many times have you given an online rating this year? ”



## Number of ratings provided last year by age and gender



Average number of ratings provided last year

**Base: Ever provide online ratings (533)** Q Now some questions on online ratings – where you go on to a company’s website to rate a particular product, service or entertainment by giving it a score out of 10 or a star rating of some kind. Do you ever provide these types of online ratings? Q. And, in the last year, how many times do you think you would have provided an online rating?

# Types of products/ services rated

## Types of products and services rated

Types of products and services rated by Australian social media users



Base: Ever provide online ratings (209) Q. For what types of products or services have you provided online ratings? (All other responses less than 5%)

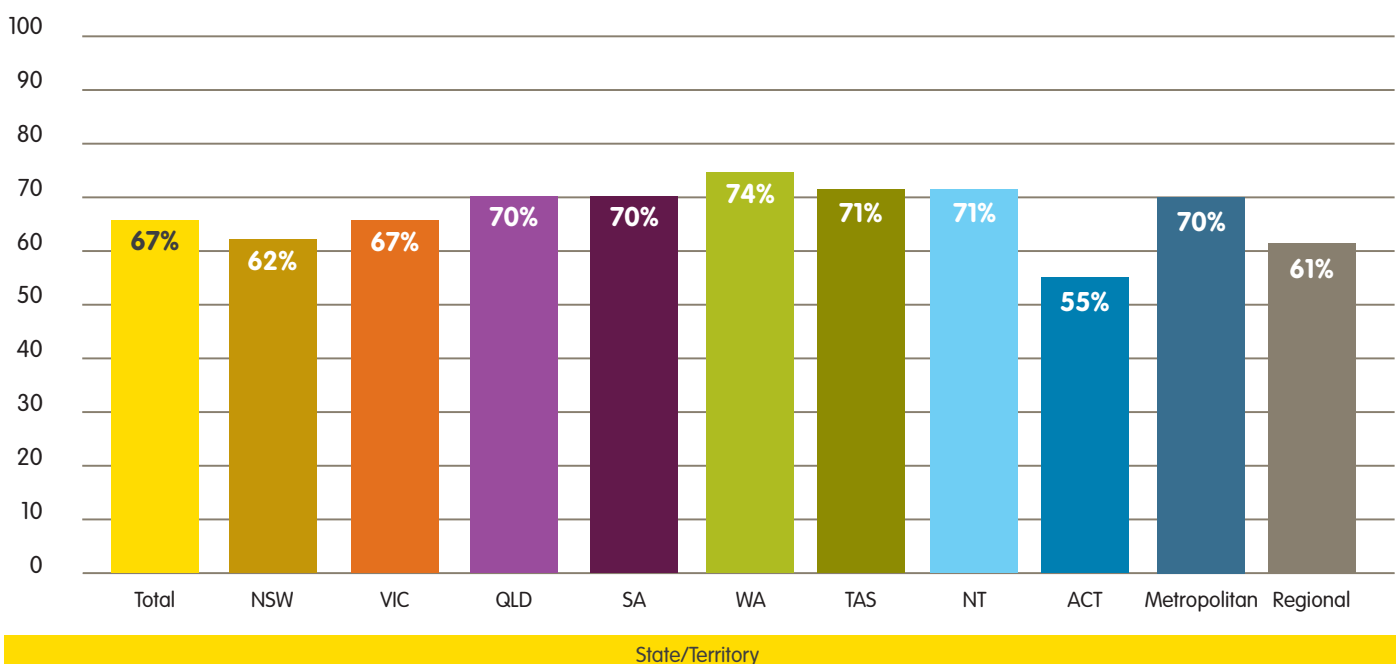
# Use of online reviews or blogs

Overall 67% of all Internet users have read/do read online reviews or blogs, down seven percentage points in the past year – with 30-39 year olds the most likely to do so. On average, people would expect to read 3 reviews before making a purchase decision.

## Proportion who have read online reviews or blogs by age and gender

Proportion who have read online reviews or blogs	2011	2012	2013	2014
<b>Total</b>	<b>63%</b>	<b>68%</b>	<b>74%</b>	<b>67%</b>
Male	65%	73%	77%	73%
Female	61%	64%	71%	61%
14 to 19	62%	60%	71%	61%
20 to 29	75%	80%	80%	70%
30 to 39	65%	65%	76%	77%
40 to 49	72%	73%	76%	68%
50 to 64	56%	57%	68%	60%
65+	44%	73%	65%	53%

## Proportion who have read online reviews or blogs by location



# Posting of online reviews or blogs

## Number of reviews read before making a decision

“How many reviews would you read before you make a purchase decision?”

60%	Up to 5
28%	6 to 10
10%	11 to 20
2%	21 to 50
1%	Over 50

On average, social media users read 3 reviews/blogs before making a purchase decision.

**3** reviews/blogs

**Base: All social media users (533)** Q Do you ever read online reviews or blogs to find out what other people think about products or services you might be interested in? Q. Approximately how many reviews would you expect to read before you make a decision?

**67%**

of all social media users read online blogs

**70%**

of metropolitan social media users read blogs or reviews

**61%**

of regional social media users read blogs or reviews

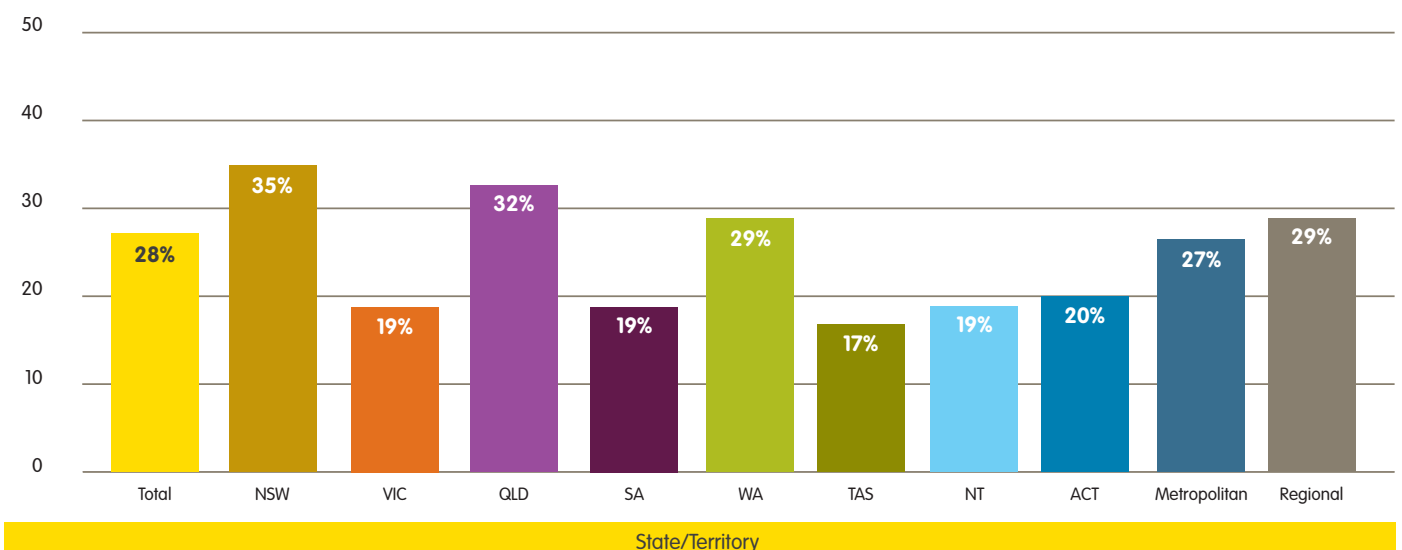
# Posting of online reviews or blogs

In contrast to the 67% who read reviews, only 28% of social media users ever post reviews or blogs on the Internet, unchanged in the past year. Among those that do provide reviews, the average number of reviews provided in the last year was 9. Reviews of hotels/motels, holiday destinations, restaurants/bars/cafes and stores were most commonly reviewed. The majority of social media users would consider changing their opinion if a business responded to a negative review or blog that they had posted. Only 44% said that they would not consider changing their mind, down slightly from 46% last year.

## Proportion who post online reviews or blogs – Trends

Proportion who post online reviews or blogs	2011	2012	2013	2014
Total	24%	24%	28%	28%
Male	26%	31%	32%	34%
Female	21%	17%	25%	22%
14 to 19	23%	27%	10%	12%
20 to 29	23%	23%	25%	25%
30 to 39	29%	24%	32%	35%
40 to 49	21%	19%	39%	35%
50 to 64	25%	28%	30%	30%
65+	21%	22%	34%	20%

## Proportion who post online reviews or blogs by location



Base: All social media users (533) Q Have you ever posted an online review or blog, where you provide your thoughts or opinions on products, services, entertainment and so forth?

# Posting of online reviews or blogs

## Number of reviews provided last year

“How many online reviews/blogs did you post?”

6%	None
59%	Up to 5
21%	6 to 10
7%	11 to 20
6%	21 to 50
2%	Over 50

Social media users that posted reviews/blogs posted 9, on average, in the past year.

**9** reviews/blogs

Base: Ever provide online reviews (186) Q. And, in the last year, how many times do you think you would have posted an online review or blog?



Base: Ever provide online reviews (186) Q. For what types of products or services have you provided online reviews or blogs? All other responses less than 5%.



# Posting of online reviews or blogs

## Effect of business response to feedback in social media

If a business responds to you after a bad review, would your opinion change?	Yes	No	Maybe
<b>Total</b>	<b>29%</b>	<b>44%</b>	<b>27%</b>
Male	30%	37%	34%
Female	29%	53%	18%
14 to 19	33%	45%	22%
20 to 29	50%	21%	29%
30 to 39	31%	41%	28%
40 to 49	28%	50%	22%
50 to 64	23%	60%	17%
65+	3%	32%	65%

Base: All social media users (533) Q If a business gets back to you after you have posted a bad review, would that change your opinion?

**50%**

of retail SME's use social media for business

**3%**

of small businesses never update their social media

only

**38%**

of large businesses measure social media ROI

**40%**

of regional SME's have a social media presence

**15%**

of small businesses using social media pay for advertising

**11%**

of large businesses outsource some of their social media

**36%**

of Australian small businesses have a social media presence

**19%**

of small businesses update their social media daily

only

**24%**

of small businesses that use social media have a strategy

**Section 2:**

Yellow Pages 

# Australian businesses and social media

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**76%**

of small business social accounts are run by the owner or manager of the business

**11%**

of small businesses with a social media presence use Google+

**48%**

of medium sized Australian businesses have a social media presence

**65%**

of large businesses update their social media every day

**51%**

of large sized businesses expect to spend more on social media in the next 12 months

Large businesses employ on average

**8 people**

to work on social media.

**13%**

of large businesses use printed material to promote their social media

The average investment for a small business using social is

**16%**

of their marketing budget

**77%**

of large Australian businesses have a social media presence

# Use of social media

(summary)

Some 36% of small businesses, 48% of medium businesses and 77% of large businesses currently report having a social media presence, with the prevalence of social media in businesses continuing to increase amongst SMEs in the past year. Facebook continues to dominate in all three categories with Twitter and LinkedIn also playing important parts across business size. Google+ usage increased for small businesses in the past year, however declined for medium businesses. Visual platforms such as Youtube, Instagram and Pinterest are also starting to see business usage in the past year.

For those businesses that did not have a social media presence at the moment, some 8% of small businesses, 3% of medium businesses and 6% of large businesses had had one in the past. The most common reasons for businesses having dropped their social media presence included that it took too much time, it did not provide a return on investment, a feeling that it was open to tampering and adverse comments, and that there had been a lack of interest in it.

Of those businesses that did not currently have a social media presence, some 19% of SMEs and 43% of large businesses without a social media presence were planning to get one in the next year. The main reasons for not getting a social media presence included a view that it was not suited to their industry or business, followed by businesses thinking that they had no need for social media.

## Proportion of businesses that have social media presence

Proportion of businesses that have social media presence	2011	2012	2013	2014
Small	14%	27%	30%	36%
Medium	25%	34%	47%	48%
Large	50%	79%	79%	77%

**Base: Total sample (1447) / (353) / (150)** Q. Does your business have a social media presence? This might include having a Facebook page, being active on Twitter, MySpace or LinkedIn, having a blog, hosting forums or having a social media based rating system?

# Use of social media

(summary)

## Which social networks businesses are using

Social media presence includes:	Small	Medium	Large
Facebook	82%	89%	83%
Twitter	25%	37%	61%
LinkedIn	25%	17%	37%
Google+	11%	9%	24%
YouTube	7%	9%	28%
Instagram	5%	9%	24%
Pinterest	4%	7%	14%
Blog	4%	6%	7%
Yammer	0%	0%	2%

Base: Have social media presence (567) / (160) / (115) Q. What does your social media presence include?

## Social media presence

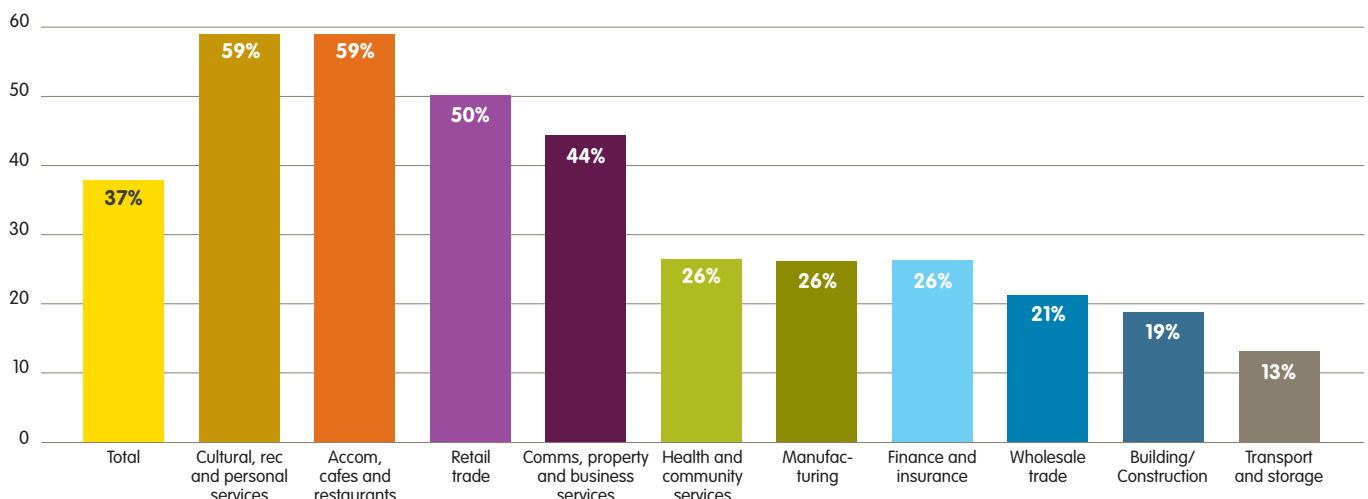
Proportion of businesses that:	Small	Medium	Large
Have had a social media presence in the past	7%	3%	6%
Intend to get a social media presence in the next year	19%	19%	43%

Base: Do not have social media presence (880) / (193) / (119) Q. Has your business had a social media presence in the past? Q. Are you planning on getting a social media presence in the next 12 months?

# Use of social media by sector (small/medium)

The below chart analyses use of social media by business sector and shows the personal services and accommodation/restaurant sectors to be most active, reflecting benefits for tourism and personal service related businesses. While social media usage increased overall, and for almost all industry sectors in the past year, there was a marginal fall for SMEs in the cultural, recreational and personal services sector, with falls also recorded in the wholesale trade sector, the building and construction sector and the transport and storage sector. The largest increase was recorded for businesses in the retail trade sector.

## Proportion of SMEs that have a social media presence



Proportion of SMEs that have a social media presence

**Base: Total sample (1809)** Q. Does your business have a social media presence? This might include having a Facebook page, being active on Twitter, MySpace or LinkedIn, having a blog, hosting forums or having a social media based rating system?

Proportion of SMEs that have a social media presence – Trends	2011	2012	2013	2014
Total	15%	27%	31%	37%
Cultural, recreational and personal services	41%	58%	60%	59%
Accommodation, cafes and restaurants	33%	47%	54%	59%
Retail trade	14%	30%	32%	50%
Communication, property and business services	14%	30%	27%	44%
Health and community services	4%	23%	23%	26%
Manufacturing	9%	16%	18%	26%
Finance and insurance	10%	13%	18%	26%
Wholesale trade	13%	27%	44%	21%
Building/construction	5%	10%	25%	19%
Transport and storage	18%	23%	17%	13%

# Use of social media by location (small/medium)

Social media usage by businesses peaks in Queensland, with strong results also for the Australian Capital Territory and Tasmania. Social media usage by SMEs grew in both regional and metropolitan areas in the past year, with regional SMEs remaining significantly more active than their metropolitan counterparts.

## Proportion of SMEs that have a social media presence

Proportion of SMEs that have a social media presence	2011	2012	2013	2014
<b>Total</b>	<b>15%</b>	<b>27%</b>	<b>30%</b>	<b>37%</b>
New South Wales	14%	30%	32%	36%
Victoria	14%	23%	27%	31%
Queensland	20%	28%	31%	48%
South Australia	11%	25%	32%	35%
Western Australia	14%	30%	34%	35%
Tasmania	12%	28%	33%	41%
Northern Territory	15%	30%	23%	35%
Australian Capital Territory	20%	34%	31%	43%
<b>Metropolitan</b>	<b>15%</b>	<b>29%</b>	<b>29%</b>	<b>35%</b>
<b>Regional</b>	<b>15%</b>	<b>25%</b>	<b>35%</b>	<b>40%</b>

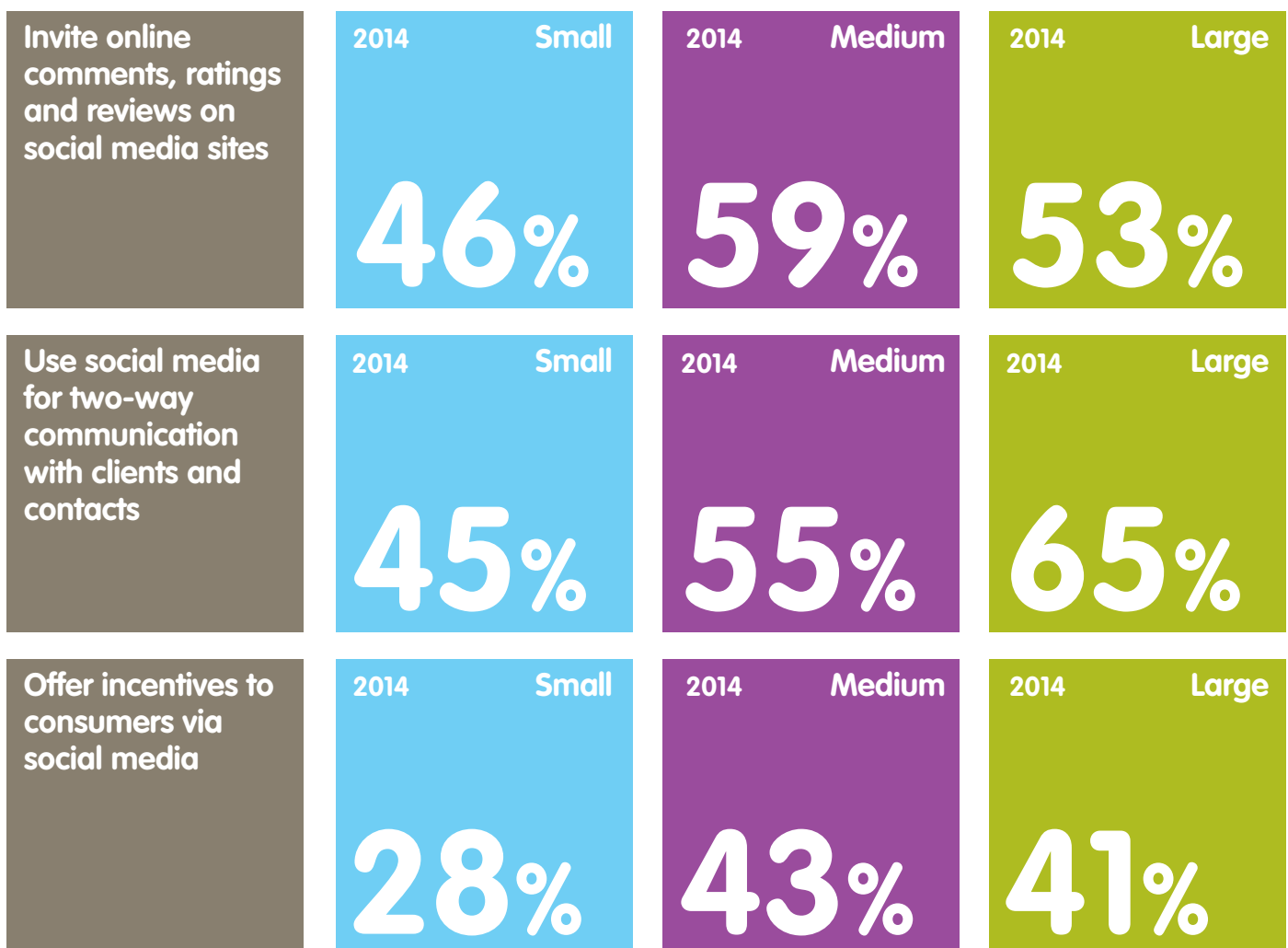
**Base: Total sample (1800)** Q. Does your business have a social media presence? This might include having a Facebook page, being active on Twitter, MySpace or LinkedIn, having a blog, hosting forums or having a social media based rating system?

# Uses of social media

The most common use of social media for small and medium businesses is to invite online comments, ratings or reviews. For large businesses, using social media for two-way communication with clients or contacts is the most common usage category.

Despite discounts and coupons being key reasons that consumers connect with businesses on social media, the proportion of businesses that offered incentives to connect was comparatively lower. Some 28% of small, 43% of medium, and 41% of large businesses who engage in social media offer incentives, with the proportion of small businesses offering incentives remaining stable over the past year. The most common incentives offered by SMEs are discounts, giveaways, coupons or service, while large businesses commonly offered competitions, giveaways and discounts.

## Common reasons for businesses to use social media

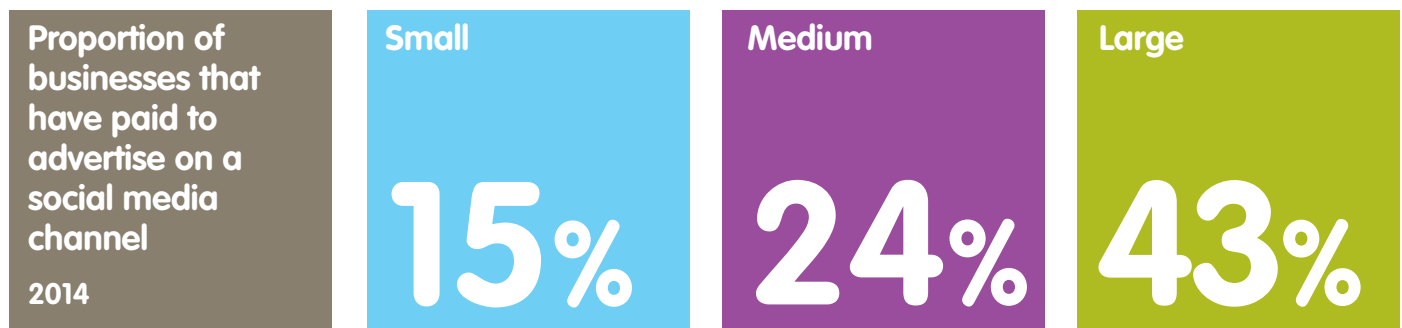


**Base: Have social media presence (567) / (160) / (115)** Q. Do you use your social media channels to engage in two-way communication with your customers and contacts? Q. Do you offer incentives to consumers via your social media presence? What sort of incentives do you offer? Q. Do you invite online comments, ratings or reviews on your business or products?

# Advertising on social media sites

Businesses are more likely to pay to advertise on social media sites the larger they are. While only 15 per cent of small businesses pay to advertise on social media sites, over four in ten large businesses reported doing this. For those businesses advertising on social media, most were advertising on Facebook. The majority of businesses paying to advertise on social media channels had found the advertising effective for their business, however there was a relationship between size and effectiveness, with larger businesses more likely to report an effective campaign.

## Proportion of businesses that have paid to advertise on a social media channel



Base: Have social media presence (567) / (160) / (115) Q. Have you paid to advertise on a social media channel?

## What channel did you pay to advertise on?

What channel did you pay to advertise on?	Small	Medium	Large
Facebook	73%	75%	82%
LinkedIn	8%	15%	22%
Twitter	4%	7%	14%
YouTube	-	-	10%

Base: Have paid to advertise on a social media channel (102) / (33) / (49) Q. Have you paid to advertise on a social media channel?

## Effectiveness of paid social media

Proportion that found paying to advertise on the channel effective	Small	Medium	Large
Facebook	66%	83%	93%
Twitter	-	64%	71%
LinkedIn	77%	80%	82%

Base: Have paid to advertise on a social media channel (102) / (33) / (49) Q. Was that effective for your business?



# Who is responsible for a business' social media presence?

Most social media is still managed internally by businesses of all sizes, with less than one in ten businesses outsourcing their social media. For those businesses that use external firms to manage their social media presence, small businesses are most likely to use a specialist social media agency, while medium and large businesses are most likely to use a communications/PR firm for their social media.

In small businesses, the owner or manager is almost invariably responsible for the social media presence, and the dependence on the business owner has increased since last year. In medium and large businesses, this responsibility sits more often with the marketing department. For large businesses the reliance on the marketing department for social media has increased in the past year.

## How is your social media managed?



# Who is responsible for a business' social media presence?

## Small business

Small business	2011	2012	2013	2014
Business owner/manager	82%	79%	72%	76%
Marketing department	10%	10%	11%	12%
IT department	2%	5%	10%	6%
Communications department	2%	3%	4%	4%
External firm	4%	3%	3%	2%

## Medium business

Medium business	2011	2012	2013	2014
Marketing department	52%	44%	43%	56%
Business owner/manager	36%	36%	40%	25%
Communications department	0%	8%	8%	9%
IT department	6%	13%	7%	8%
External firm	6%	0%	3%	2%

## Large business

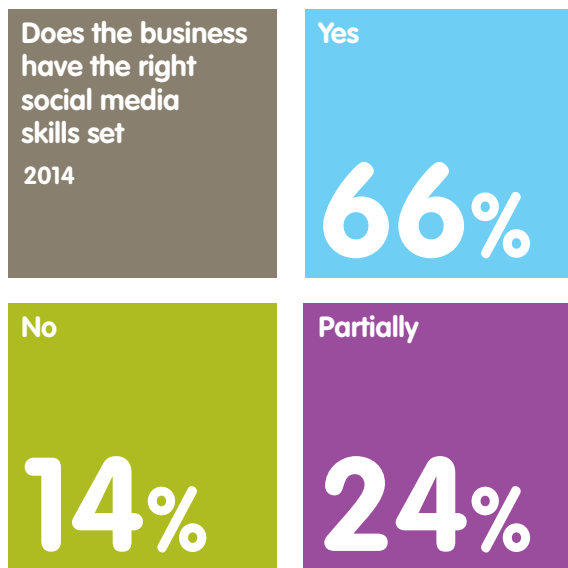
Large business	2011	2012	2013	2014
Marketing department	74%	64%	66%	77%
Communications department	0%	17%	10%	13%
Business owner/manager	17%	10%	8%	4%
IT department	0%	5%	3%	4%
External firm	1%	0%	3%	2%

Base: Have social media presence (567) / (160) / (115) Q. Is your social media managed internally or outsourced? What type of external firm is it outsourced to? Which area of your business has overall responsibility for your social media presence?

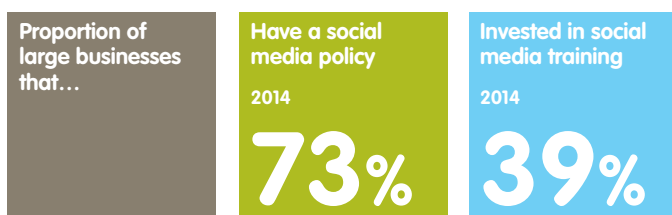
# Social media management in large businesses

Many larger businesses have put in place structures and policies for social media. Almost three-quarters of large businesses have a policy on what is or is not appropriate for staff to do on social media, and 39% have invested in specific social media training, however both of these indicators have decreased further in the past year. The average number of social media employees employed by large businesses was eight down from 16 last year reflecting that large businesses are moving to a model of having small in-house social media teams. However this average is swayed by a few very large businesses with large numbers of social media employees. The median number of employees for large businesses is three, unchanged in the past year. Two-thirds of large businesses thought that they had the right social media skills set in their organisation, unchanged in the past year. Large businesses also use their social media presence for customer service, with four in ten receiving complaints through social media, and almost all large businesses responding to them.

## Social media skills in large business



## Social media development in large business



**Base: Have a social media presence (115)** Q. Do you have a social media policy to help your employees understand what is/isn't appropriate for them to do in terms of their personal use of social media versus being a representative of the company/commenting on the company or brands? Q. Does your company invest in any social media training for your employees? Q. How many people does your organisation have working on your social media involvement? Q. Do you have the right social media skills sets in your organisation?

## How many people does your business have working on your social media presence?

How many people does your business have working on your social media presence?	2013	2014
1 to 5	70%	75%
6 to 10	13%	11%
11 to 20	6%	3%
Over 20	6%	12%
Average	16	8
Median	3	3

## Social media as a customer service channel



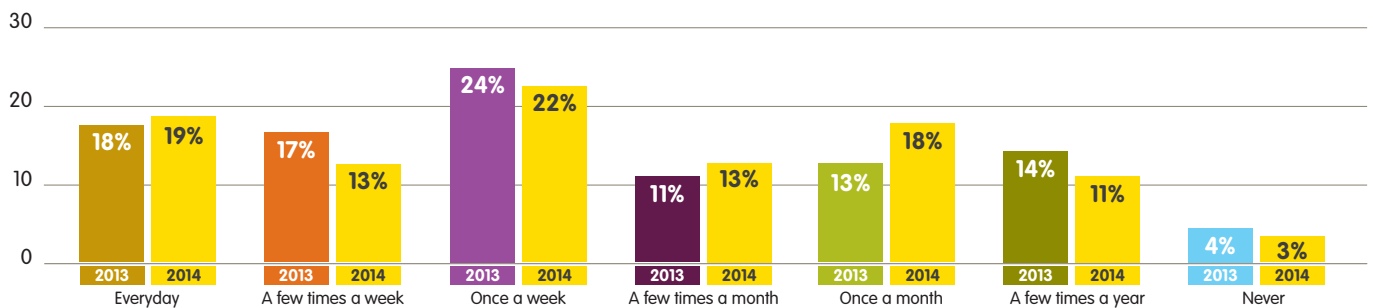
**Base: Have a social media presence (115)** Q. Have you received complaints through your social media channels from customers?

**Base: Receives complaints through social media (69)** Q. Do you respond?

# How often businesses update their social media

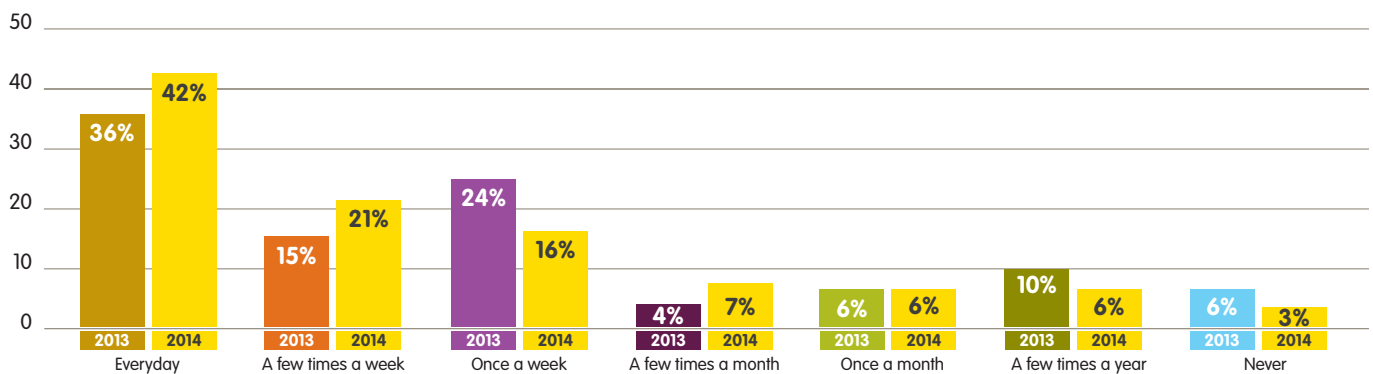
Large businesses were much more likely than small or medium businesses to update their social media at least on a daily basis, with 65% of large businesses reporting daily updates. The proportion of both small and medium businesses that updated their social media daily has increased slightly since last year, and while daily updates were still the most popular for medium businesses, small businesses were most likely to update their social media on a weekly basis.

## How often small businesses update their social media



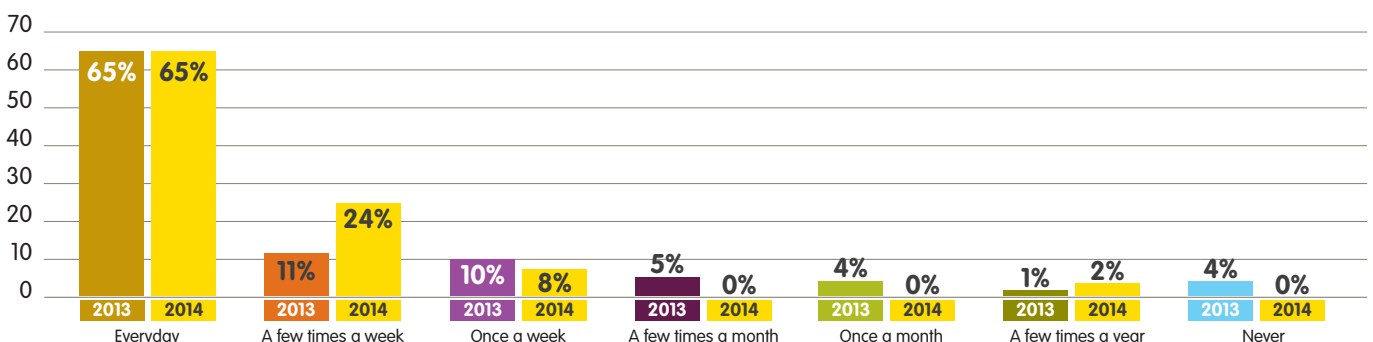
How often small businesses update their social media

## How often medium businesses update their social media



How often medium businesses update their social media

## How often large businesses update their social media



How often large businesses update their social media

# How is traffic driven to a business' social media presence?

Base: Have social media presence (567) / (160) / (115) Q. How often do you monitor or update your social media presence?

Over seven in ten small businesses have some form of strategy to drive people to social media sites – most often a link on their website. Almost nine in ten medium businesses have a strategy and, again, website links continue to play the most significant part. For large businesses, 92% have a strategy to drive traffic to their social media site, with website links used by four in ten.

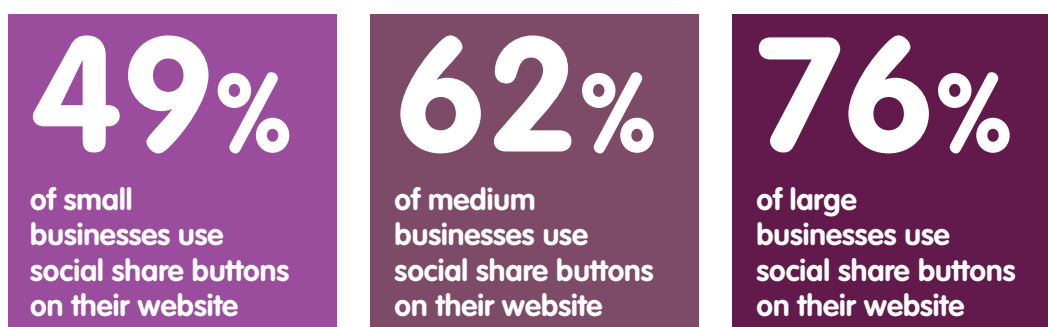
While many businesses don't have a strategy to drive traffic to their social media sites, they are more likely to have buttons on their websites to help people share their information onto their own social media sites. Almost half of small businesses, almost two-thirds of medium businesses, and over three-quarters of large businesses actively facilitated the sharing of information from their websites by including social media buttons.

## Means of driving traffic to social media presence

Means of driving traffic to social media presence	Small	Medium	Large
Have links on our website to our social media site	37%	54%	43%
Like/follow/subscribe to other's social media sites	15%	20%	14%
Advertise our social media presence on other websites	9%	15%	12%
Advertise our social media presence in traditional media	8%	19%	17%
Include links in directories	6%	6%	3%
Word of mouth	5%	4%	3%
Paid search	4%	1%	6%
E-mail	3%	8%	9%
Competitions/promotions	3%	2%	5%
Printed materials	2%	9%	13%
None – no strategy to drive traffic	29%	12%	8%

Base: Have social media presence (567) / (160) / (115) Q. How do you drive traffic to your social media presence?

## Social sharing buttons on websites



Base: Have social media presence (567) / (160) / (115) Q. Do you include social media buttons on your website to help people share information about your business on their social media presence?

# Business investment in social media

Overall, 81% of small businesses involved with social media have made some financial investment in it, increasing strongly from 61% last year. While many are not sure what the investment is, most of those who do answer report an average of \$4,560, up from \$1,970 in 2013.

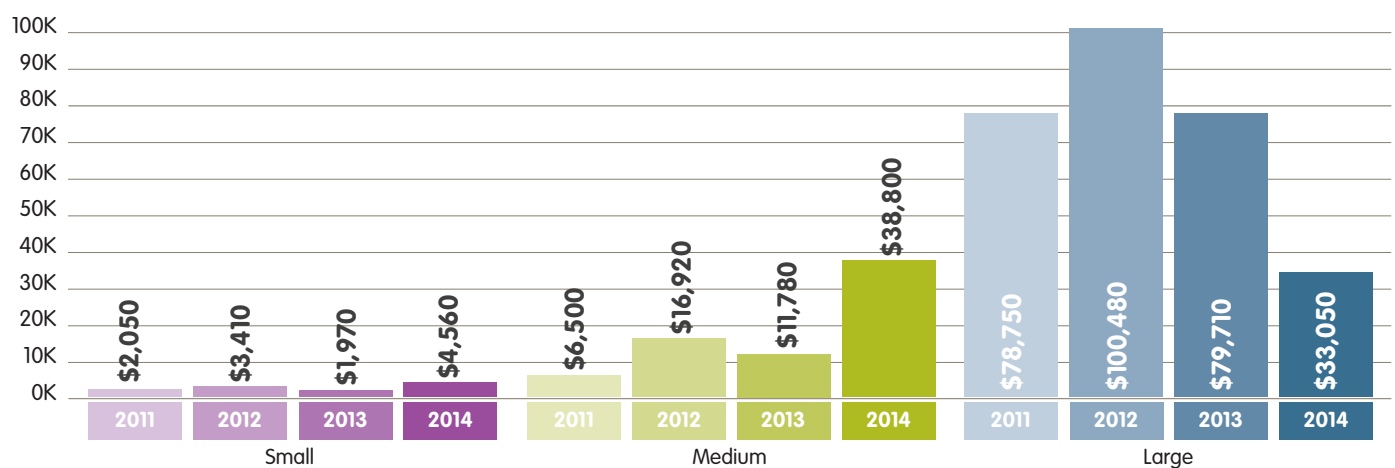
A larger 95% of medium business social media users have invested in social media although, again, almost one in three are unable to nominate an amount. Most of those who do give an answer report an average of \$38,804, up from \$11,780 in 2013.

And 94% of large business social media users have invested financially, but a very high 44% can't nominate the amount. The average nominated expenditure in social media from those businesses that did know was \$33,050, down from \$79,710 in 2013, reflecting a considerable drop in social media spend amongst larger businesses in the past year. However, this decline in spend is more a reflection of a decline in marketing budgets for large businesses.

## Annual social media budgets

Annual budget on social media	Small	Medium	Large
Nothing	20%	5%	6%
Up to \$500	11%	5%	16%
\$501 to \$1000	7%	7%	4%
\$1001 to \$5000	11%	17%	12%
\$5001 to \$10000	5%	6%	4%
\$10001 to \$50000	5%	10%	10%
Over \$50000	0%	11%	7%
I don't know how much I spend	32%	34%	44%

## Average social media budgets – trends



Average budget

Base: Have a social media presence (448) / (151) / (119) Q. Approximately, what is your current investment in social media? What do you spend a year?

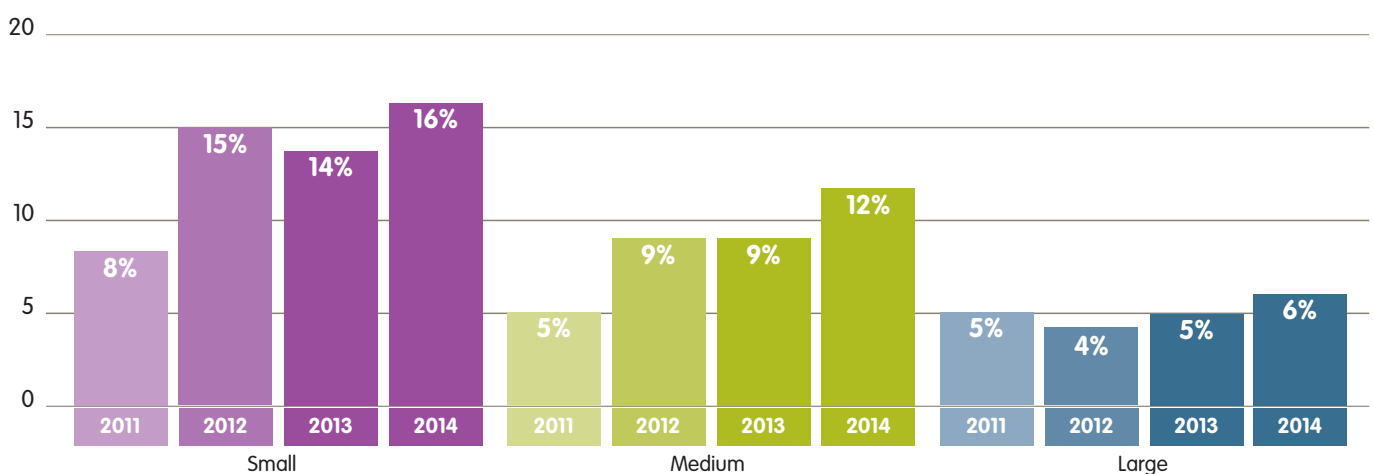
# Percentage of marketing budget allocated to social media

Overall, the proportion of marketing spent on social media has increased in the past year. There was a 2.3 percentage point fall in the proportion of marketing budget spent by small businesses on social media, there was an 2.4 percentage point increase for medium businesses and a 0.7 percentage point increase for large businesses. On average, small businesses who use social media allocate 16% of their budget to social media, while medium businesses allocate just under 12% and large businesses just over 5%.

## Percentage of marketing budget allocated to social media

Percentage of marketing budget allocated to social media	Small	Medium	Large
Up to 10%	48%	44%	47%
11% to 20%	6%	12%	7%
21% to 50%	9%	7%	7%
Over 50%	4%	2%	4%
Don't know	29%	30%	29%

## Average proportion of marketing budget – Trends



Average proportion of marketing budget

Base: Have social media presence (567) / (160) / (115) Q. Approximately what percentage of your marketing budget is allocated to social media?

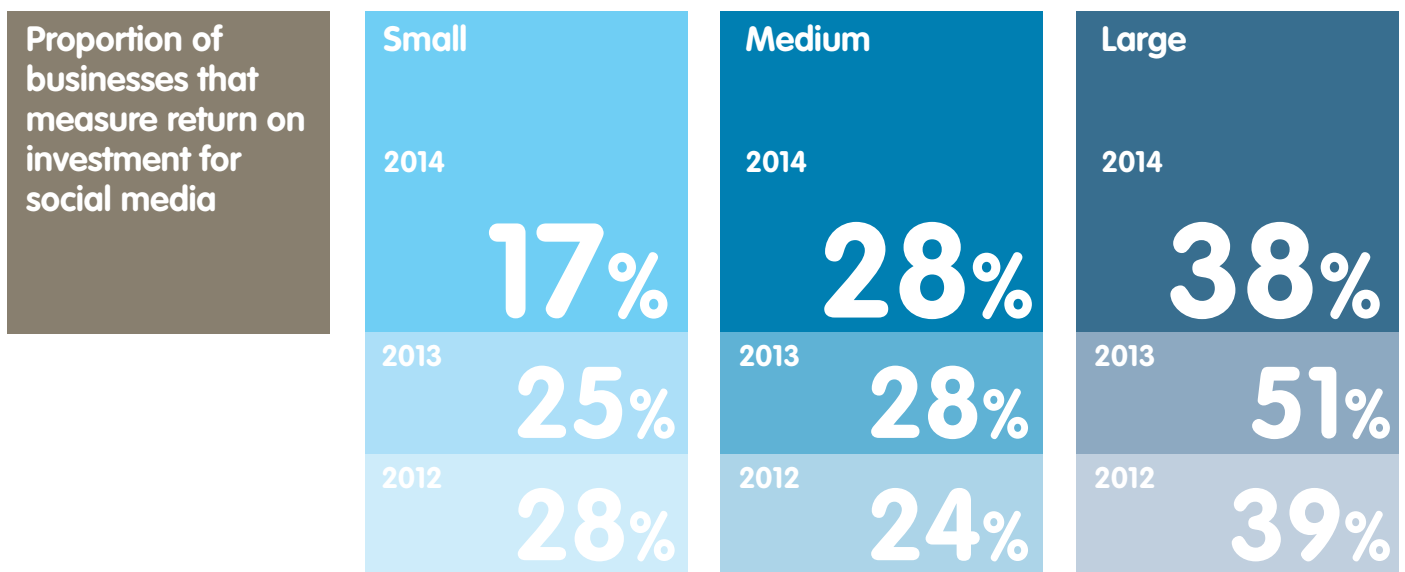
# How businesses measure the success of social media investment

Just 17% of small businesses and 28% of medium businesses formally measure the return on their social media investment, compared to 38% of large businesses, with drops in the proportions of small and large businesses measuring ROI in the past year. Those businesses that do measure return on investment are most likely to do this by monitoring the number of responses on social media.

For those businesses that do report measuring the ROI of their social media investment, many do not know what it is. Overall, one-quarter of small businesses, 30% of medium businesses and half of large businesses reported not knowing their social media ROI. Small businesses were the most likely to report knowing their ROI and one in five reported that they had made a return in excess of 50% of their investment, whereas medium and large businesses were most likely to report having made a return of under 5% of their investment.

Whilst the majority of businesses do not formally measure the ROI of their social media, there was also little clarity on what constituted a successful social media strategy. Most commonly small and medium businesses measured success by sales/revenue or profits, while large businesses measured by the number of likes/followers or subscribers to their social media channels. Almost 30% of large businesses that used social media did not know whether their social media had been successful.

Relatively few small businesses had developed a strategic plan in their business for social media, with only 24% reporting they had a strategy for their social media, compared to 45% of medium businesses and 73% of large businesses.



Base: Have social media presence (567) / (160) / (115) Q. Do you measure your return on investment into social media?



# How businesses measure the success of social media investments

## How businesses measure social media ROI

How businesses measure social media ROI	Small	Medium	Large
Monitor number of responses on social media	43%	57%	55%
Asking customers how they found you	32%	29%	2%
Third party statistics provider	14%	8%	18%
New sales	11%	6%	9%
Online/automated/analytical tools	9%	27%	30%
Specific deals for social media customers	5%	4%	9%
In-house statistics/marketing department	4%	2%	7%
Volume of sales/customers/revenue/new sales	3%	0%	0%
Saving a customer	1%	0%	5%

Base: Measures social media ROI (109) / (35) / (44) Q. How do you measure the return on investment into social media...?

## Return on social media investment

Return on social media investment	Small	Medium	Large
Have not yet recovered investment	15%	9%	9%
Under 5%	12%	28%	16%
6% to 10%	1%	12%	7%
11% to 20%	18%	3%	7%
21% to 50%	9%	3%	7%
Over 50%	20%	16%	5%
Don't know	25%	30%	50%

Base: Measures social media ROI (109) / (35) / (44) Q. And what do you estimate the return on your investment in social media has been...?

## Measures businesses use to report on social success

How businesses measure the success of their social media	Small	Medium	Large
Sales/revenue/profits	29%	42%	9%
Number of likes/followers/subscribers	15%	38%	50%
Number of hits on our website	10%	0%	1%
Number of responses/enquiries/calls	7%	0%	0%
Usage	4%	2%	15%
Positive conversations on social media	2%	0%	14%
Klout score	2%	0%	1%
Take up of incentives/offers	1%	0%	7%
Analytical tool	0%	0%	3%
Don't know/don't measure	6%	8%	29%

Base: Have social media presence (567) / (160) / (115) Q. How do you measure the success of your social media?

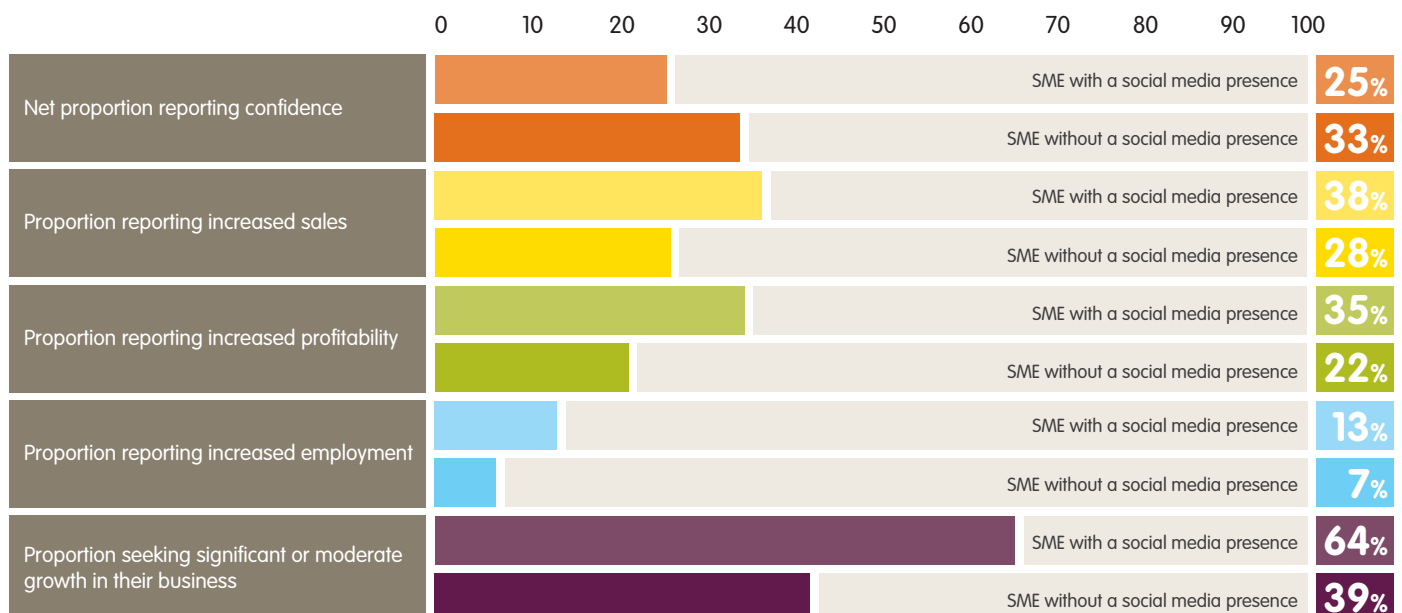
# Social media and business performance in Australian SMEs

While SMEs have their own measures of success for their social media strategies, it is interesting to take a step back and see how SMEs with social media performed on a wide range of economic indicators compared to businesses without a social media presence. With the SME component of the survey undertaken in conjunction with the Sensis® Business Index, it is possible to see how firms with a social media presence performed compared to firms without a social media presence.

The March 2014 Sensis® Business Index found a fall in SME confidence, reversing some of the previous quarter's record increase following the recent Federal Election, with confidence at net 29% on average. SMEs with social media were less likely to report increased confidence (net 25%) compared to SMEs without a social media presence (net 33%).

However, despite the lower confidence, business performance for a broad range of economic indicators was higher for those SMEs with a social media presence. Some 38% of SMEs that used social media reported increased sales, compared to 28% of those that didn't. SMEs with social media were also more likely to report increases in profitability (35% compared to 22%) and increasing employment (13% compared to 7%).

SMEs that used social media were also more likely to be actively seeking to grow their businesses (64% compared to 39%).



Base: All SME's

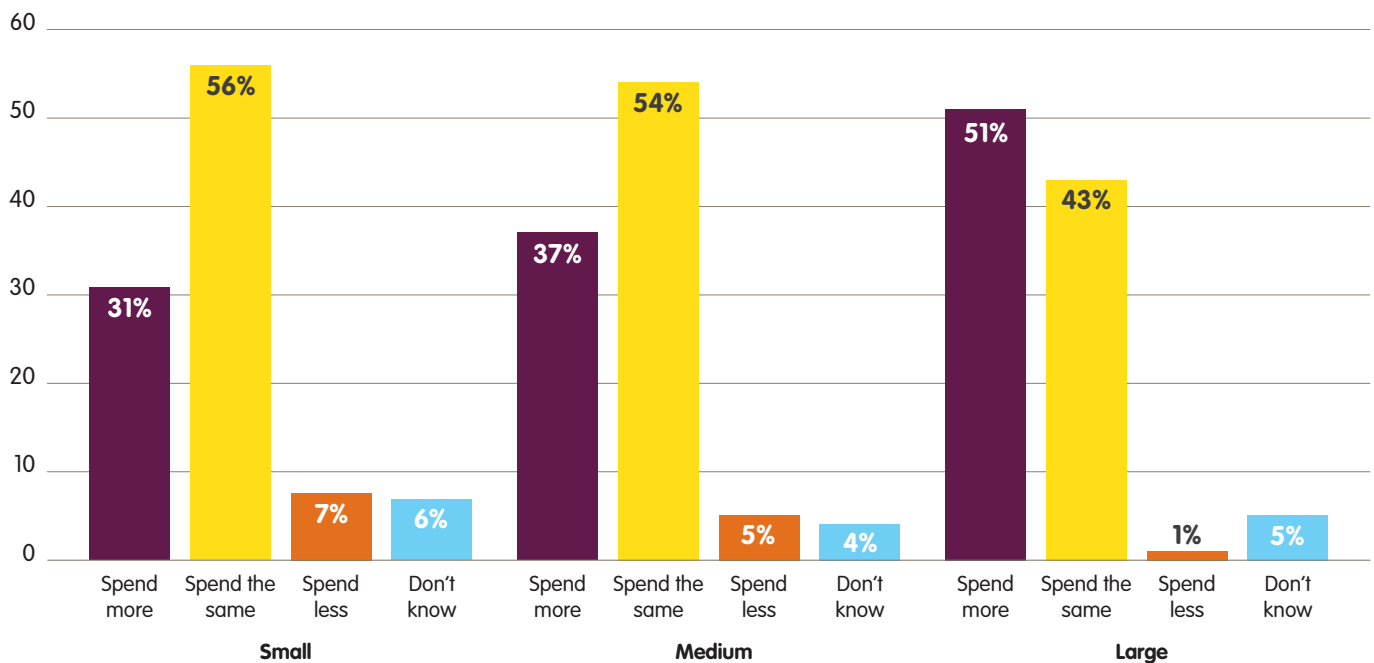
# Expectations for the next 12 months

There is a clear indication that those who currently have a social media presence are planning to increase their expenditure on this in the year to come, with a net 24% of small, 32% of medium, and 50% of large businesses expecting an increase.

For those large businesses planning to increase their social media expenditure, some 45% are planning to spend less on print advertising, however over one in three are not planning to reduce budgets in other areas as a consequence of their planned increase spend on social media.

The majority of businesses with a social media presence expect that their social media investment will contribute to an increase in sales over the next 12 months – with the average expectation for increase being approximately 18% for small businesses, 6% for medium businesses and 9% for larger businesses.

## Expectations for social media expenditure



Expectations for social media expenditure

Base: Have social media presence (448) / (151) / (119) Q. Thinking about your total planned investment in social media for the next 12 months, are you planning to spend more/spend the same/spend less/don't know?

# Expectations for the next 12 months

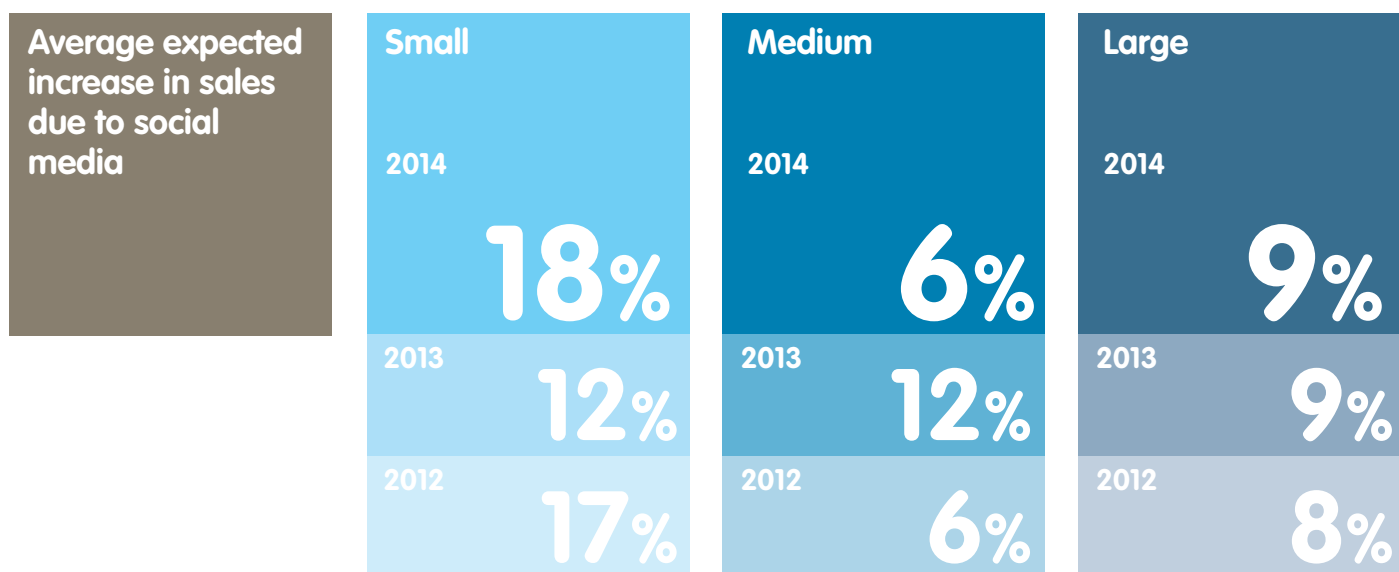
## Which marketing activity will be cut as a consequence of increased social media spend? (Large businesses)

Which marketing activity will be cut as a consequence of increased social media spend? (Large businesses)	Large
Print advertising	45%
Nothing	35%
Radio advertising	7%
TV advertising	5%
Sponsorships	3%
Trade shows	2%
Online advertising	2%
Don't know	13%

Base: Large businesses planning to increase social media expenditure (60 Q. If you are planning on spending more in social media, what are you planning on spending less on?)

## Do businesses believe that social media investment will contribute to an increase in sales?

Do businesses believe that social media investment will contribute to an increase in sales?	Small	Medium	Large
Yes	58%	75%	67%
No	42%	25%	33%



Base: Have social media presence (567) / (160) / (115) Q. Do you believe that your social media investment will contribute to an increase in sales in the next 12 months?

# About

## About Sensis

Sensis helps Australians find, buy and sell. Our integrated network of local search and digital marketing solutions delivers real, measurable business leads to Australian businesses.

Sensis' multichannel network includes Yellow Pages®, White Pages®, Whereis® digital mapping solutions, TrueLocal\* and request-for-quote service, Quotify\*\*. This increasingly diverse network spans print, online, mobile, iPhone, iPad, Android and satellite navigation, and information can also be shared from online to mobile and social networking sites.

Sensis helps ensure our advertisers are found by more customers than ever by managing their presence across a growing number of advertising platforms including search engines such as Google, Bing and Yahoo!

\*TrueLocal is an unregistered trade mark of Australian Local Search Pty Ltd (ABN 68 109 826 351)

\*\*Quotify is a registered trade mark of Life Events Media (ABN 82 118 014 298)

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# 19%

of Australians access social media more than 5 times a day

# 21%

of Australian internet users aged 65+ access social media daily

# 69%

of Australians use social media

# 28%

use social media to research products and services

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# 95%

of Australian social media users are on Facebook

Australian social users have an average of

# 328

friends or followers

# 40%

of regional SME's have a social media presence

# 71%

of Australian social users access social sites on a smartphone

The typical Australian Facebooker spends more than

# 8.5

hours on site a week

# 33%

of social media users follow businesses

# 50%

of retail SME's use social media for business

# 20%

of small businesses update their social media daily

# 36%

of Australian small businesses have a social media presence

# 51%

of large sized businesses expect to spend more on social media in the next 12 months

Large businesses employ on average

# 8 people

to work on social media.

# 41%

41% of Australians use social media while watching TV

Yellow Pages

