



2nd Annual Social Media Study


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Study Overview

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- In 2008, we conducted a survey of our SheSpeaks members, to understand their adoption and usage of social networks and their interactions with brands. We used this data to shape our advocacy and research programs
 - In 2009, we followed up, asking similar questions, to understand the changes in behavior and what's driving them
 - We plan to repeat the survey in 2010
 - We're always happy to discuss the results. If you'd like to talk about the survey, please call us at 212.830.9883



Social Network Usage

Social Networks vs. Twitter

Social Media & Brands

48% Increase in Participation in Social Networks

86% of women have a profile on a social networking website, up 48% since last year. This increase is even greater for older women (126%), whose participation grew from 31% to 70%. Women under 30 boast a 96% participation rate on social networks.

Proportion Who Have Profiles on any Social Networking Site

	2009	2008
Yes, have a profile	86%	58%
No, don't have a profile	14%	42%

Comments

↑ Women <30 years up from 86% in 2008 to 95% in 2009

↑ Women 50+ up from 31% in 2008 to 70% in 2009

Participation in social networks is virtually identical for women of all income levels

Q: Do you have a profile on any social networking website (e.g., MySpace, LinkedIn, Facebook, Classmates)?

Facebook has Catapulted Ahead of MySpace...

- Of those who have a social networking profile, **95% have a profile on Facebook**, up from 65% last year (a 46% increase)
- MySpace has experienced a precipitous decline, dropping 33% from 63% of women having profiles to 42%. MySpace is still relatively popular with younger women, with 70% of 18-24 year olds having profiles
- Twitter (38% participation rate), which was not included in this study last year, is **quickly encroaching on MySpace**
- Classmates.com demonstrated a decline (27% in 2009 vs. 35% in 2008)
- LinkedIn has grown somewhat (22% in 2009 vs. 17% in 2008)

Proportion Who Have Profiles on...

	2009	2008
Facebook	95%	65%
MySpace	42%	63%
Twitter	38%	N/A*
Classmates	27%	35%
LinkedIn	22%	17%
Café Mom	11%	10%
Reunion	4%	11%
LiveJournal	4%	5%
Friendster	4%	4%
Gather	4%	3%

N= respondents with social networking sites
 *Not involved in 2008 survey

Q: On which of the following websites do you have profiles? [Check all that apply.]
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...And Dominates All Other Social Networking Sites

- When asked which site they log into most frequently, **Facebook overshadows all other social networking websites**. Those who said they are most active on Facebook increased 107% from 42% in 2008 to 87% in 2009
- Comparatively, those who said MySpace was their top social networking site **dropped 83% from 35% to 6%**

Proportion Who Most Frequently Visit...

	2009	2008
Facebook	87%	42%
MySpace	6%	35%
Classmates	2%	7%
LinkedIn	2%	4%
Café Mom	1%	2%
LiveJournal	0%	1%
Gather	0%	0%
Reunion	0%	0%
Friendster	0%	0%

N= respondents with social networking sites

Q: On which website that you have a profile are you most active? (i.e., log in the most frequently, interact with others most frequently)
[Check one.]

Facebook vs. Twitter

While Facebook has much more widespread adoption than Twitter, there is room for both networks in women's lives.

- Very few (7%) said they use Facebook less since they began using Twitter
- Of women who use both Facebook and Twitter, **there is a strong preference for Facebook (80%)** and many abandoned Twitter after creating their accounts (25%)
- Facebook users are **twice as likely to log in every day (72%)** than Twitter users (36%)
- However, the networks have **distinct purposes that address different needs** women have in their lives (chart on next slide)

The Facebook logo, consisting of the word "facebook" in white lowercase letters on a dark blue rectangular background.The Twitter logo, consisting of the word "twitter" in blue lowercase letters on a white rectangular background with a light blue shadow.

Facebook vs. Twitter: To Each Her Own

	Those who prefer Facebook like...	Those who prefer Twitter like...
Interaction	Interacting with friends you know	Following new people with common interests, professional contacts, celebrities and following companies
Anonymity/ Privacy	Only friends with people you know/ no concerns about strangers following you	Freedom in speaking anonymously/ ability to follow interesting people you don't know
Tools	Breadth of things to do, such as upload photos, games, personalize your page, etc.	Focus on information sharing
Content	Plenty of room to update status (140 characters just isn't enough)	Quick, concise updates
Usability	It's easy to use...Twitter is too quick and confusing	It's easy to use...Facebook has too many irrelevant applications

Facebook vs. Twitter: Do We Really Have to Choose?

While Facebook is currently more popular than Twitter among women, at the end of the day, women see purpose for both networks in their lives. Both are great for fun and sharing ideas.

- Facebook serves a need to interact with friends and upload photos
- Twitter is great for professional contacts and companies, learning about promotions and coupon codes and quick and up-to-the-minute information updates
- Women love having both tools in their lives, and fortunately they don't have to choose!

"I love Twitter, but if I had to give up either Facebook or Twitter - I'd give up Twitter. But, I'd be HURTING!!! I use each to support the other!"

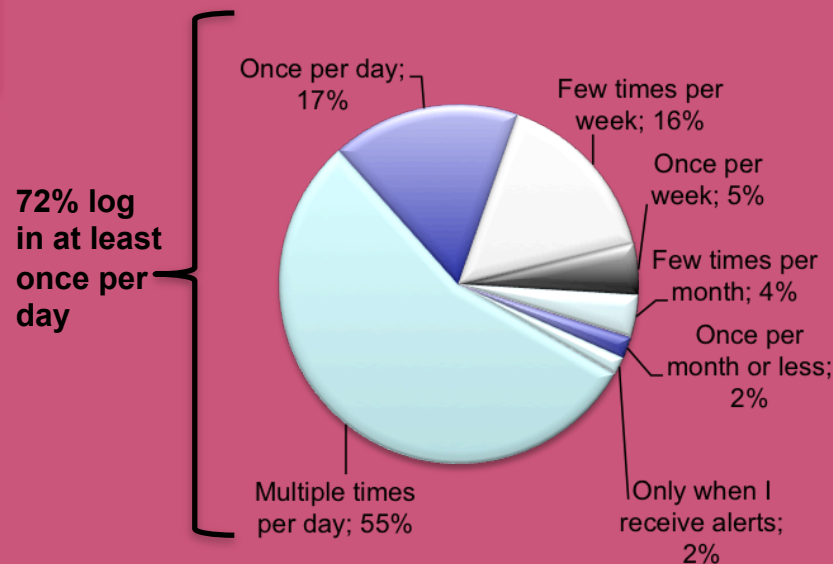
"[I like Facebook to] personalize and add more information. however, I like twitter because it's instant and gives more coupon codes/promotions."

"I guess I don't actually like [Facebook] better, just differently. It's more interactive with people you actually know, whereas Twitter is a great place to follow people/companies with content you're interested in."

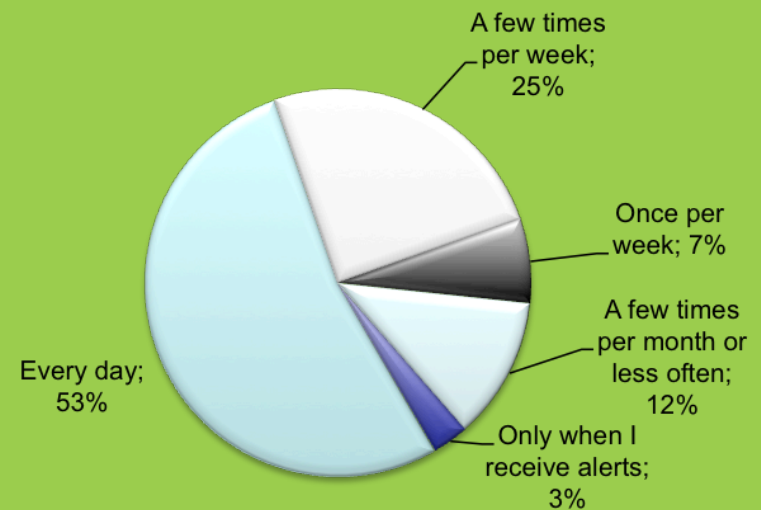
Women Log Into Social Networking Sites More Frequently

Seventy-two percent of women log into their social networking site at least once per day. Last year only 53% logged in that frequently, indicating a 36% increase in this high-level engagement.

Frequency of Logging Into Social Networking Site: 2009



Frequency of Logging Into Social Networking Site: 2008

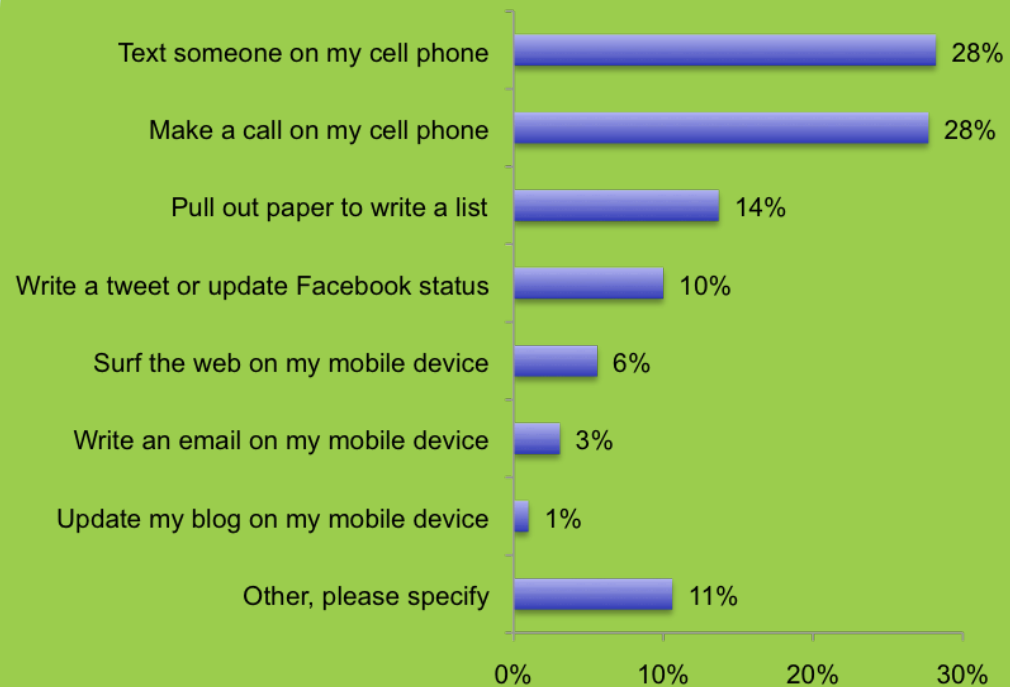


Q: How frequently do you log into your social networking accounts?

Social Networking on Mobile Still Limited

The most popular two activities are texting (28%) and making calls on cell phones (28%). Many also do non-digital activities such as pulling out paper to write a list (14%) and reading books/magazines ("Other," 11%).

Activities While Waiting



Q: When you have a few free minutes (i.e., waiting in a line, waiting for a bus) which are you most likely to do?

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Watching Video is the Most Popular Online Activity

About one-in-four women watch video content online “frequently,” and 85% watch it at least “sometimes.” Commenting on blog posts is also common, with 68% doing this at least “sometimes.” **Fifty-three percent publish product reviews on a shopping site**, thirty-seven percent blog at least sometimes and 19% create and upload videos sometimes.

Frequency of Various Online Activities

	Frequently	Sometimes	Just tried it once or twice	Never done this
Watch video content online	39%	46%	10%	5%
Post a comment on someone else's blog	32%	36%	17%	16%
Write an entry in your own blog	20%	17%	15%	49%
Publish a product review on a shopping site	18%	35%	21%	27%
Create a video and uploaded it (to a blog, YouTube, etc.)	5%	14%	19%	63%

Q: How frequently do you do each of the following?



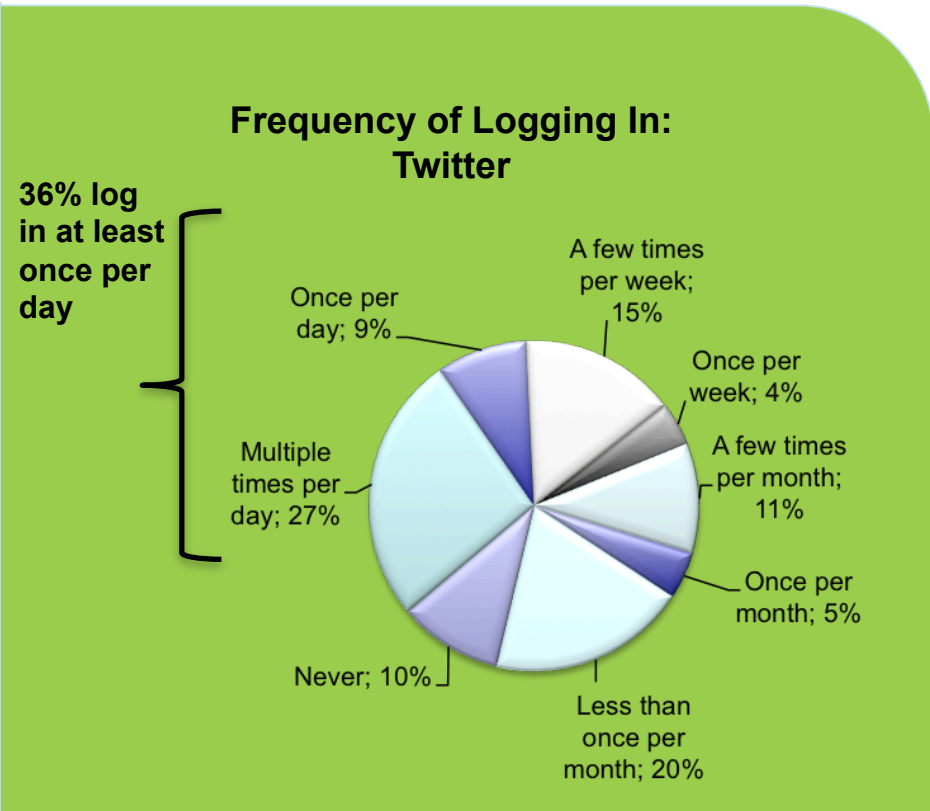
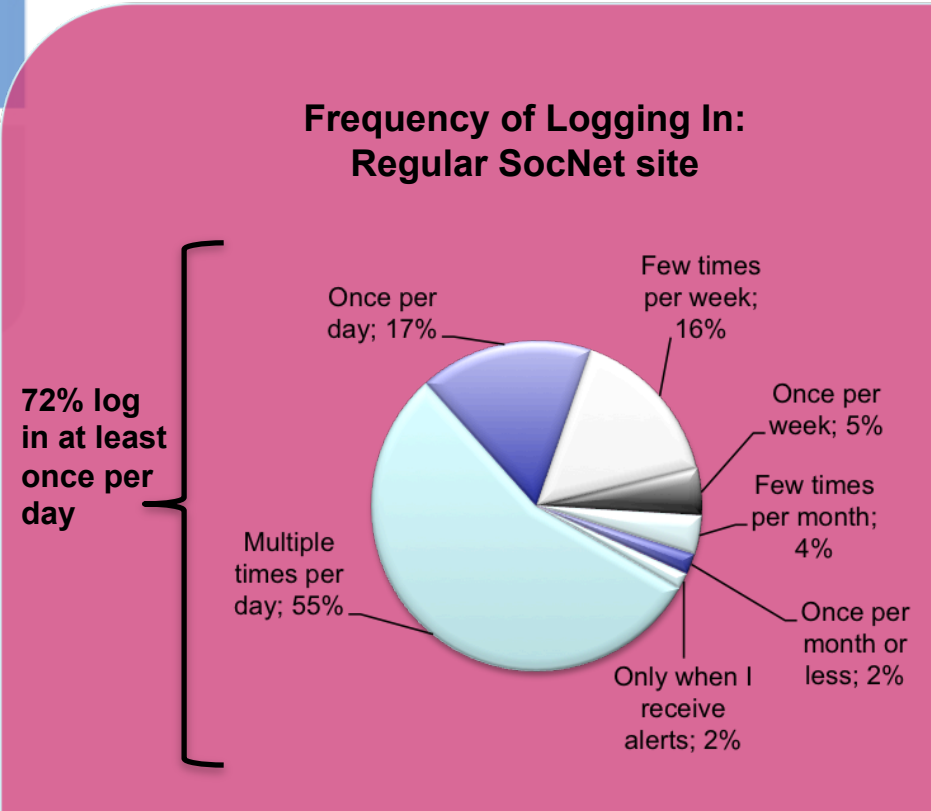
Social Network Usage

Social Networks vs. Twitter

Social Media & Brands

Frequency of Engaging With Regular Social Networking Sites is Double that of Twitter

Twice as many women (72%) log into their regular social networking account at least once per day as compared with those who log into Twitter that frequently (36%).

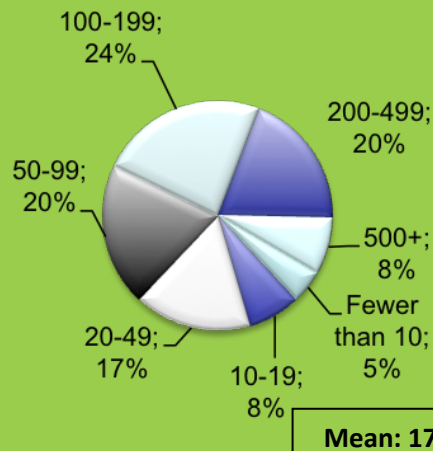


Q: How frequently do you log into your social networking accounts?
 Q: How frequently do you use Twitter (either for twittering, viewing other peoples tweets, etc.)

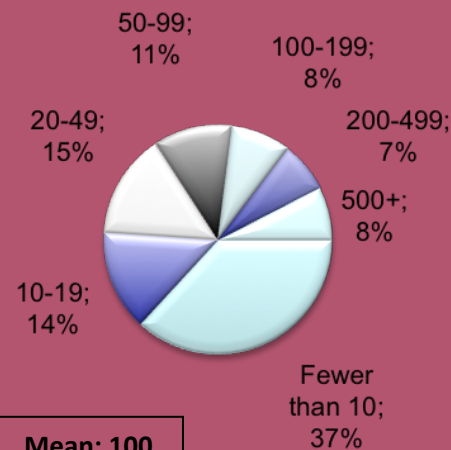
Social Networking Friends Exceed Twitter Connections by 74%

The highest proportion (24%) of *women* have 100-199 friends on their *social networking websites*. On Twitter, the highest proportions follow fewer than 10 people (37%) and are followed by fewer than 10 people. Looking at the average number of connections on each type of site, *women* have 74% more contacts on their top social networking website (174 contacts) than they do on Twitter (100 contacts).

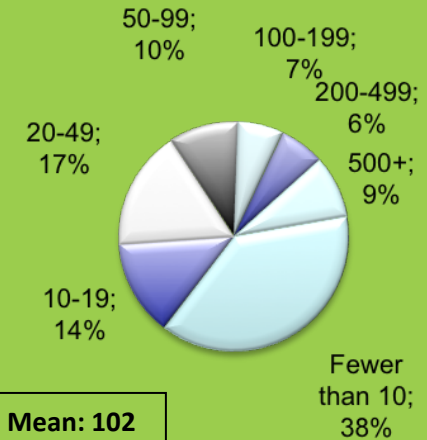
Social Networking Friends



Number Followed on Twitter



Number Who Follow You on Twitter



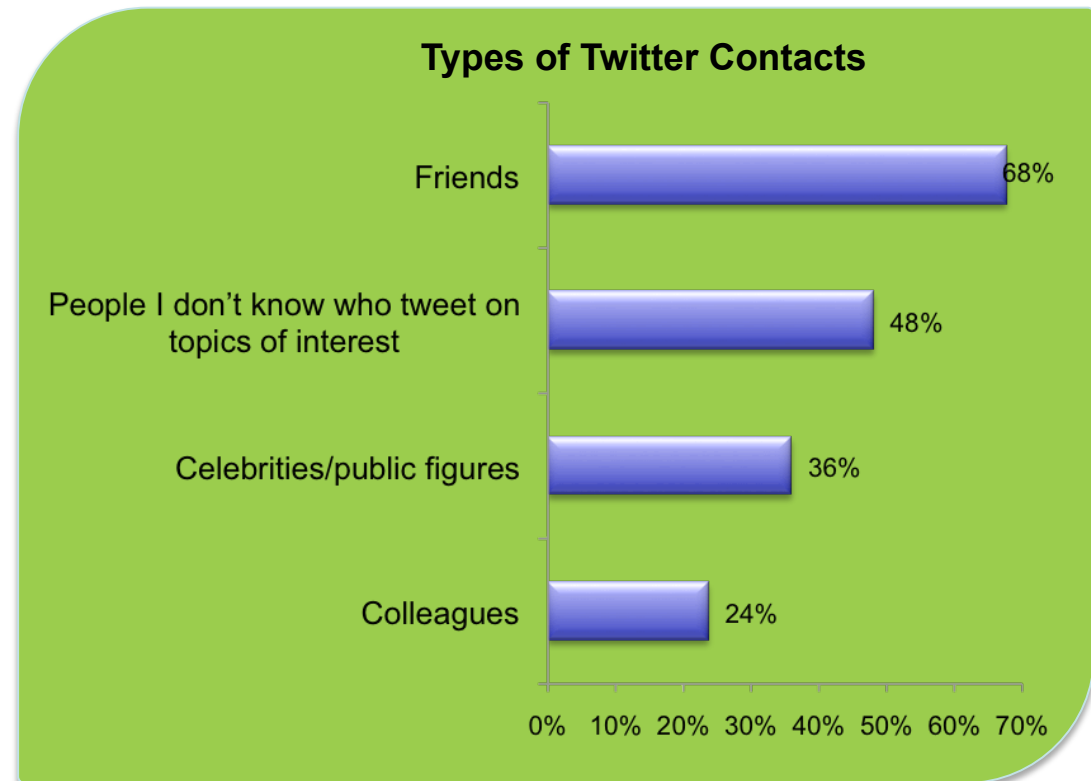
Q: Consider the social networking website where you are connected with the greatest number of contacts/friends. How many people are you connected with?

Q: How many people on Twitter do you follow? Q: How many people follow you on Twitter?

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Women Have a Range of Twitter Contacts

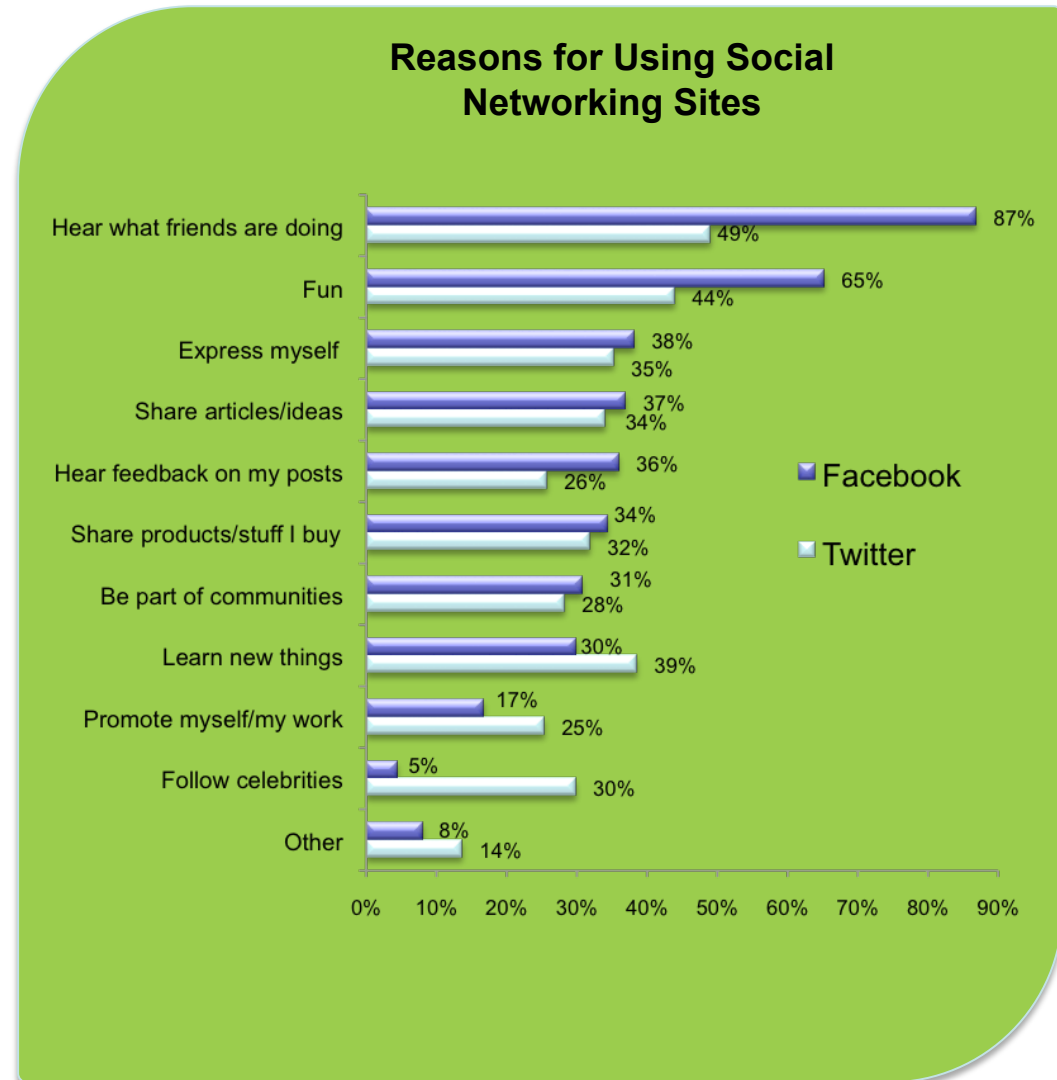
While friends (68%) are the most common type of contact on Twitter, respondents also have many contacts whom they don't know (48%), celebrities (36%) and colleagues (24%).



Q: What types of people do you commonly follow on Twitter?

Social Networks are for Connecting; Twitter is for Learning

- Respondents are relatively more likely to use Facebook to hear what friends are doing (87% vs. 49% for Twitter), for fun (65% vs. 44%) and to hear feedback on their posts (36% vs. 26%)
- Twitter is more useful for learning new things (39% vs. 30% for Facebook), promoting oneself (25% vs. 17%) and following celebrities (30% vs. 5%)
- Thus, the two tools have very different purposes for users

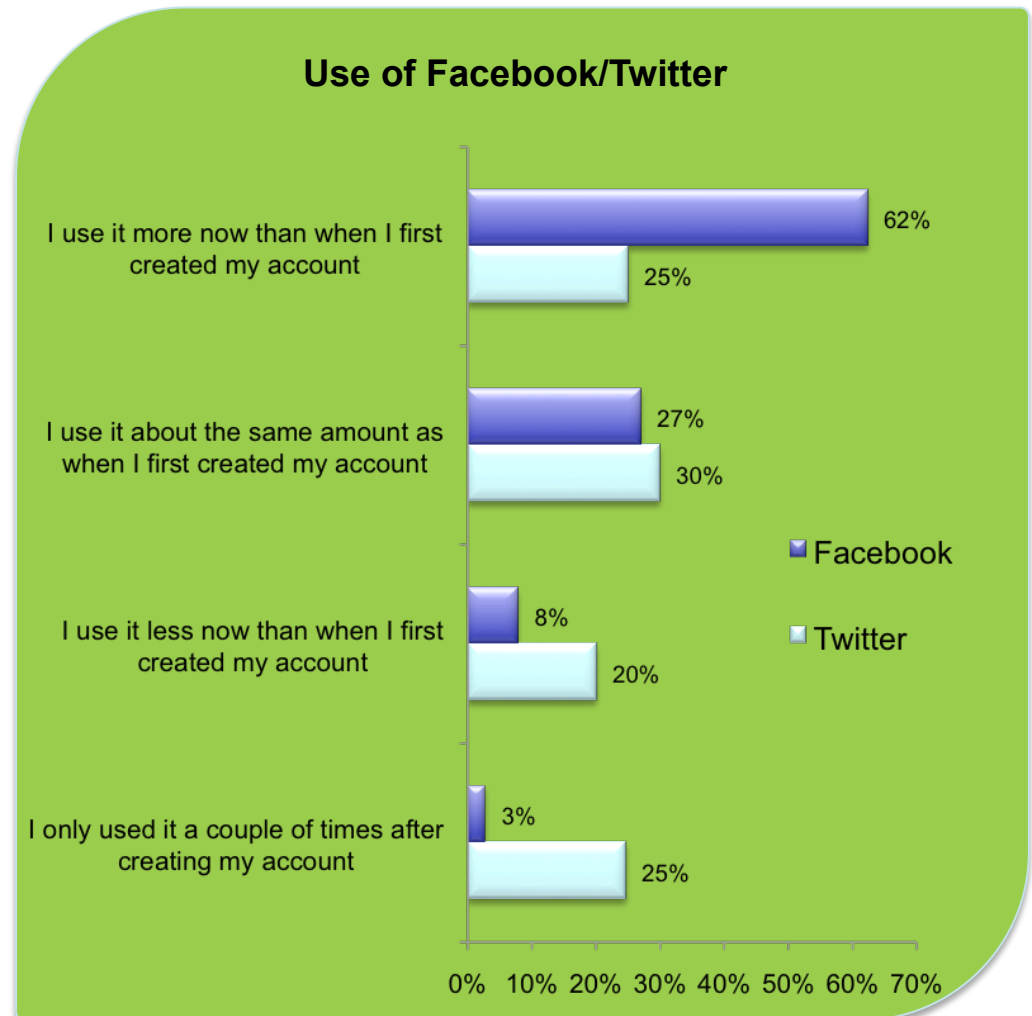


Q: Why do you use social networking sites such as Facebook?
Q: Why do you use Twitter?

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Facebook Generates More Loyalty than Twitter

While the majority of women (62%) use their Facebook accounts more often than when they first created their accounts, the same is not true for Twitter (25%). For Twitter, 20% use it less than when they first created their account, and 25% only used it a couple times after creating their accounts.



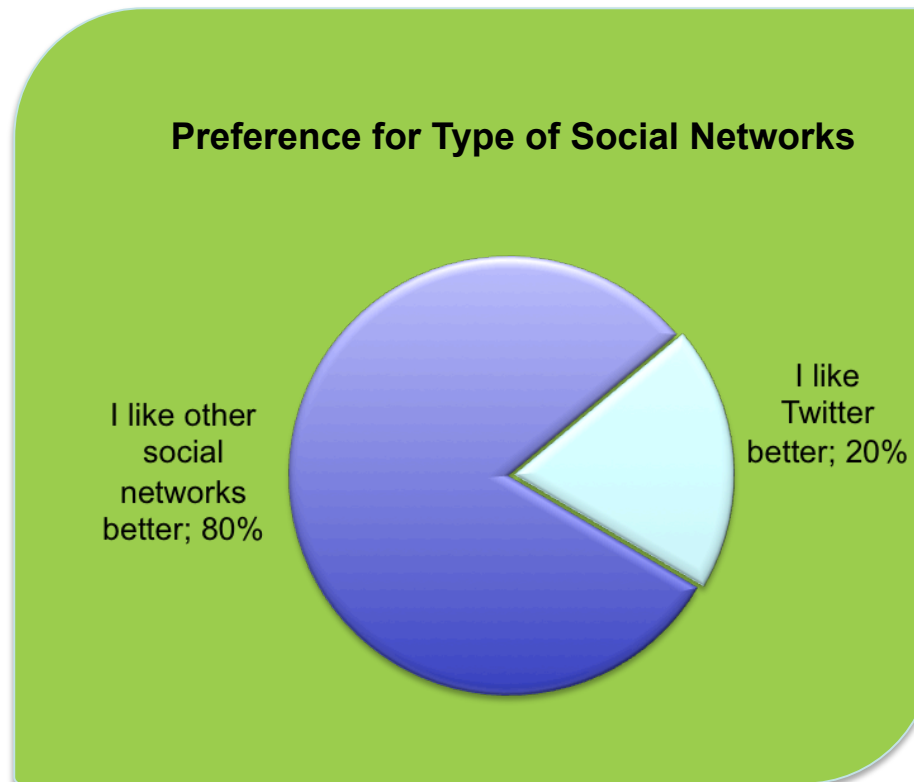
Q: If you have a Facebook account... compared to when you first created your Facebook account, how frequently do you access it?

Q: How often do you use your Twitter account?

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General Social Networks are Far Preferable to Twitter

The vast majority (80%) report that they like other social networks such as Facebook more than Twitter.



Q: How does Twitter compare with other social networks that you use, such as Facebook?

N= Respondents who use both Twitter and other social media tool.

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Reasons for Preferring Facebook

Those who prefer Facebook like the personal and “three-dimensional” aspect of the website. Not only can they update their status, but they can upload and share photos, read personal content about their friends, join groups, play games, etc. Community is important to Facebook lovers, and they find the “anonymity” of Twitter to be a downfall, as they do not like having strangers “following” them. Many find Twitter irrelevant and confusing, and that Tweets are too short to express anything meaningful or useful.

Interactivity & breadth of functionality

“I like social networks because its easier to use and i get to get on a more personal level with people.

“Pictures and more people I know personally on other social networks. Twitter is used more for following news, radio shows, local events”

Depth of Interaction

“Feel like I get to know the people better. I know every person personally on facebook but most of my Twitter friends I have never met”

Q: Why do you prefer other social networks such as Facebook?

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Reasons for Preferring Facebook

Twitter is Trivial

"I don't like when people tweet trivial things like: 'Just leaving the job,' 'Heading to the studio,' 'Tweeting from the car is cool'" etc.

"I don't really see the value in Twitter. my day is too busy to read 'tweets' and to post 'tweets'"

140 characters is not enough

"For Twitter, you're only allowed 140 characters. If there is a promotion going on or I'd like to review a product, I can't do it in the limited amount of characters"

"I can't say what I want in 140 characters. It's not enough"

Twitter takes too much time

"So many of the Twitter posts are nonsense and it takes too long to weed through everything"

"Twitter requires too much instant attention"

Q: Why do you prefer other social networks such as Facebook?

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Reasons for Preferring Facebook

Managing Privacy

"Because they [Facebook] seem to be more private, I like that I don't have to tell everyone what I'm doing every hour!"

"I can send emails through Facebook so not everyone can read what I have to say!"

Facebook is easier to use

"Twitter is more confusing and difficult to use than Facebook"

"It's easier to manage the amount of information coming and going with FB; Twitter is more like instant messaging in a group format"

"I love Twitter, but I like the fact that I can go back to posts on Facebook and read others' comments directly below that post. Twitter makes it harder to follow others' responses to a post if too much time has elapsed"

Q: Why do you prefer other social networks such as Facebook?

Reasons for Preferring Twitter

Twitter fans have clear reasons for preferring Twitter: They can be more anonymous, the content is current and focused, it is information-oriented, and it is easy and quick.

Anonymity

"I like that it doesn't require too much personal information. I don't like strangers knowing my full name, state, etc"

Focused experience

"Twitter is more focused than facebook which is all over the place"

"Everything is short and sweet. I'm not bombarded by a load of irrelevant information"

"It's easier to keep up with others posts because it's pared down compared to facebook. There are no games or clubs, etc. to join"

Q: Why do you like Twitter better?

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Reasons for Preferring Twitter

Search and Sharing

"Because I am able to connect to a larger group rather than just my friends on Facebook. Also, what I write on Twitter can be searched whereas Facebook cannot"

"It's easy to retweet information"

Speed

"It's fast and mobile. Can post anywhere, anytime"

"The quick interaction and the short bursts of time can spend there. Plus. Amazing rate you can contact a company about a direct problem you are having RIGHT then"

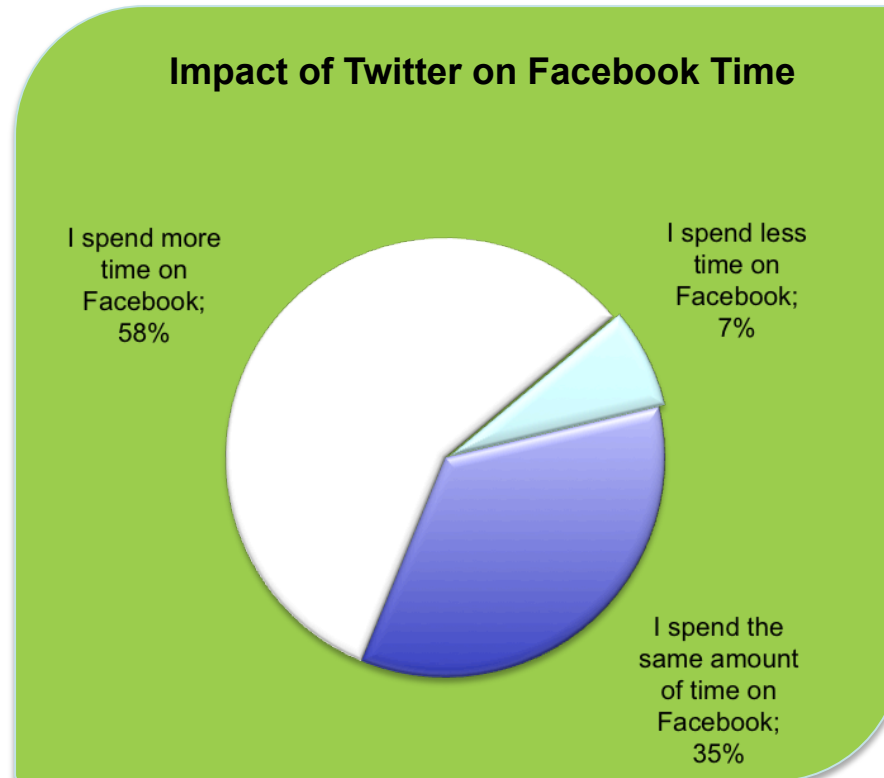
"Short, to the point, and takes less time. Also immediate gratification and not having to respond to millions of messages..."

Q: Why do you like Twitter better?

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Twitter Has Not Taken Away From Facebook Time

Those who use both Twitter and Facebook say that since joining Twitter, *the time they spend on Facebook has actually increased*. Because women get different benefits from each social network (and because they prefer the benefits of Facebook), *there is room for both social networks in their lives*.



Q: If you use Facebook as well as Twitter, which of the following best describes you? Since I joined Twitter...

N= Respondents who use both Twitter and Facebook.



Social Network Usage

Social Networks vs. Twitter

Social Media & Brands

Social Networks and Brands

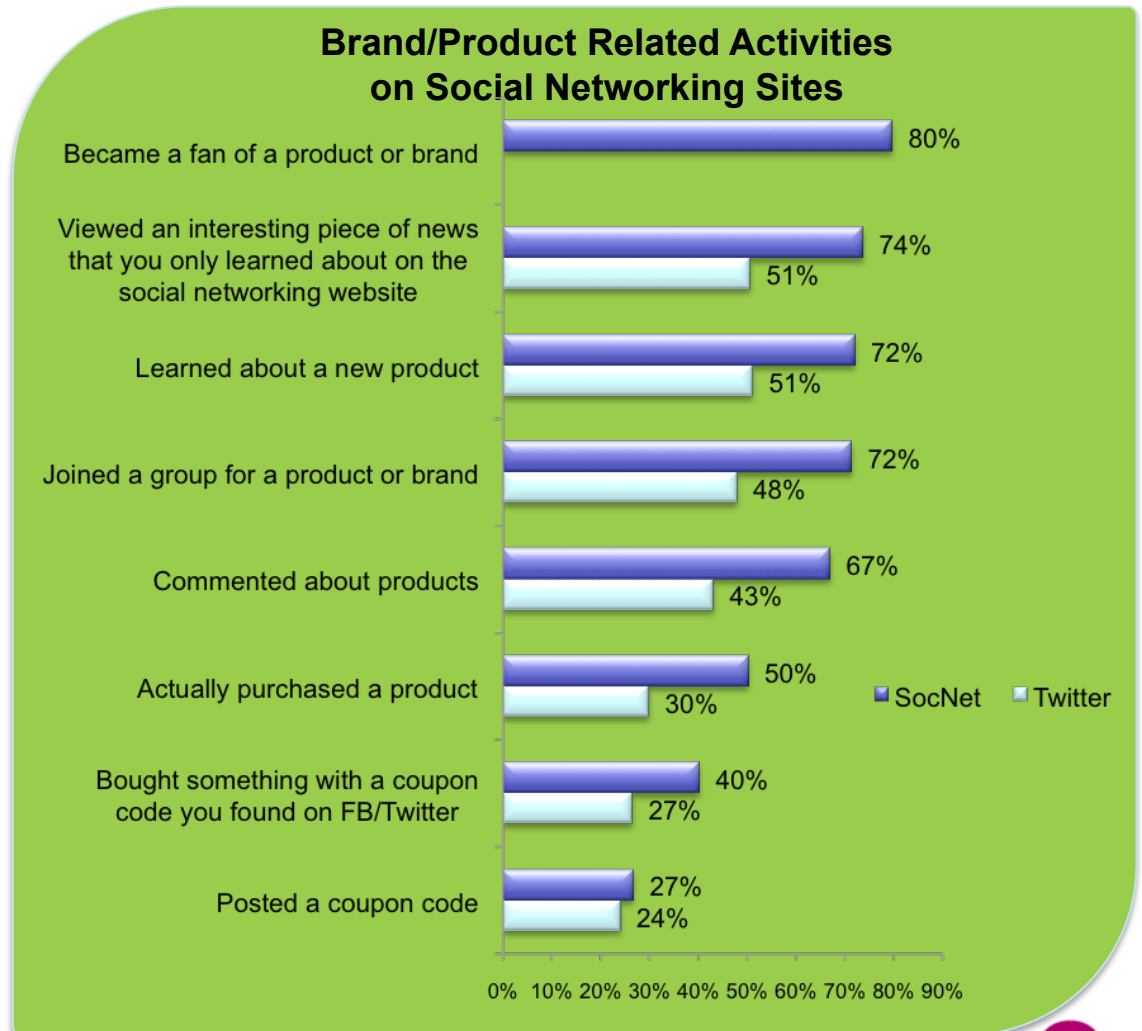
Women are interacting with brands on social network by incorporating them into their friend lists and following them on twitter

- They are a venue for learning about and commenting on new products (72%)
- 80% have become fans of products or brands on Facebook
- 50% of women with social network profiles have purchased products because of information they got from friends or companies on social networking sites
- Twitter is useful for following companies and learning about promotions and coupon codes



Social Networks are More Common Venues for Brand/Product Interactions

- *One-half of women have purchased a product because of something they read on a social networking site, and 40% have used coupon codes that they found on social networking sites*
- *Women are more likely to have learned about new products, joined a brand/product group, commented about products, etc., on a social networking website than they have on Twitter. All activities suggested are more prevalent on social networking sites, primarily because **women are more active on social networking sites overall***



Q: Have you ever done any of the following on a social networking website?

Q: Have you ever done any of the following on Twitter?

While Respondents Seem Less Engaged With Advertising...



Attentiveness to Social Network Advertising

	2009	2008
I always look to see what ads are on my page, and I often click through	↑ 9%	2%
Sometimes I look and think they're interesting enough to click through	↑ 30%	13%
I always notice, but I've never clicked through	10%	10%
Sometimes I'll take a look at what's being promoted	20%	30%
I am annoyed with them, but notice them	12%	20%
I actively ignore ads on my page	21%	26%

...Purchases From Blog Posts and Social Networking Increased Dramatically

*While emails received from a family members are still the most popular drivers of purchases (65%), **making purchases based on blog posts (53%) and social networks (43%) increased dramatically from the prior year.***

New Media Purchase Drivers

	2009	2008
An email you received from a friend/family member	65%	72%
An email you received from a company	56%	51%
A blog post you read	 53%	27%
A post on a shopping website	47%	55%
A post on a discussion board	47%	42%
Information you obtained on a social networking website	 43%	27%
A text message you received on your phone	11%	6%

Q: Have you ever bought a product because of...? [Check all that apply. If none apply, continue with the survey.]
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Thank you!

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