

NOVEMBER 2009

PEOPLE FROM
COSSETTE



SOCIAL MEDIA STUDY

Research Brief

For full details:

http://www.cossette.com/www/news_socialmediastudy2009.php

According to a study
by **Impact Research**
for advertising agency
People from Cossette...

- | | |
|--|---------|
| 1. Social media IS replacing e-mail | Page 3 |
| 2. Facebook (not Twitter) IS poised as next Google. | Page 8 |
| 3. Social media IS a source of information | Page 13 |
| 4. There IS word of mouth about brands online. | Page 19 |
| 5. Those who share brand info online DO value advertising | Page 22 |

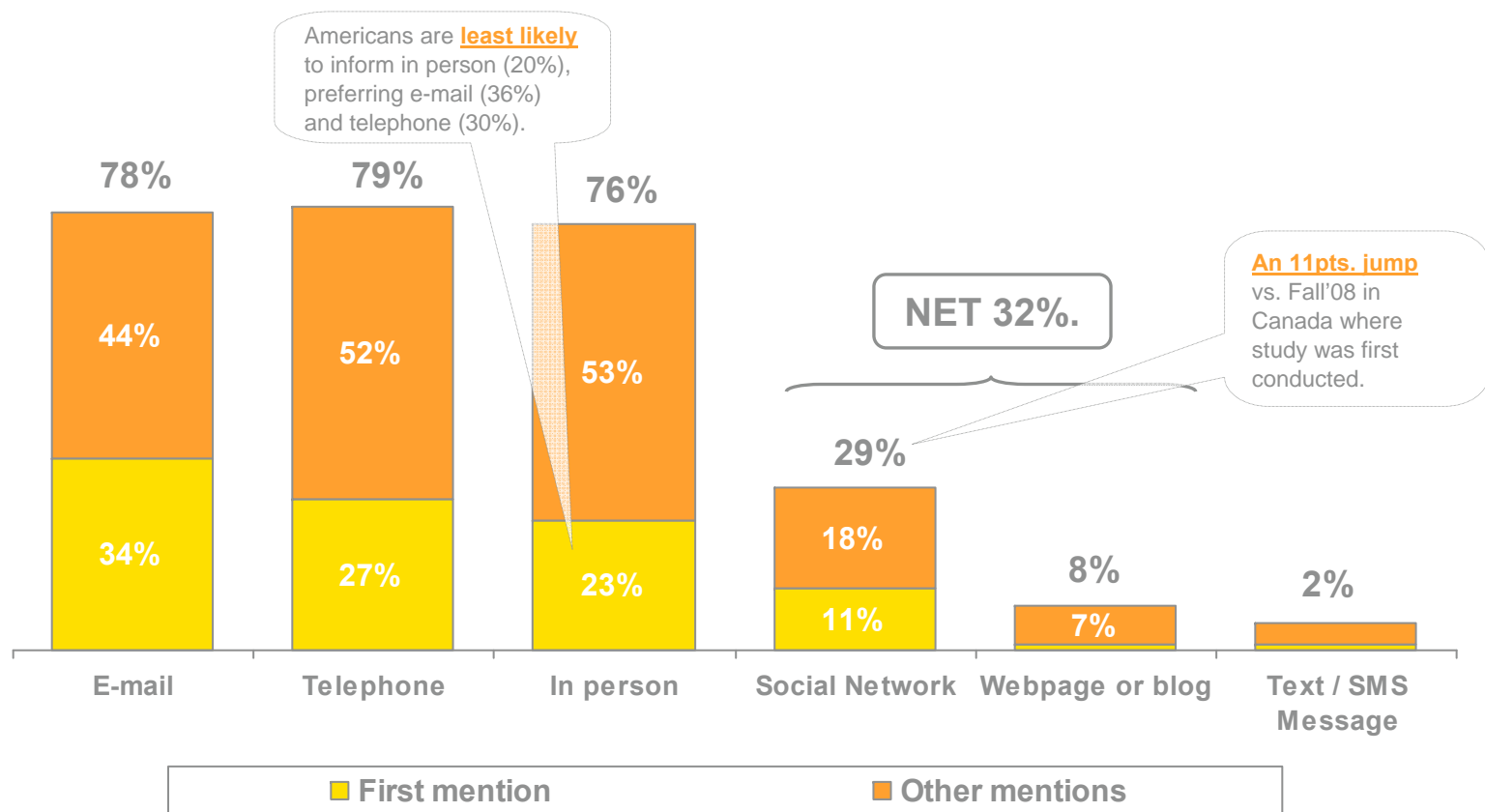
PLUS

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Social media
could replace e-mail
as **most popular** means
of sharing information.

Nearly a third of the Internet population claims they **publish information** they want to share with others.

" Social
media could
replace e-mail
as most
popular
means of
sharing
information"



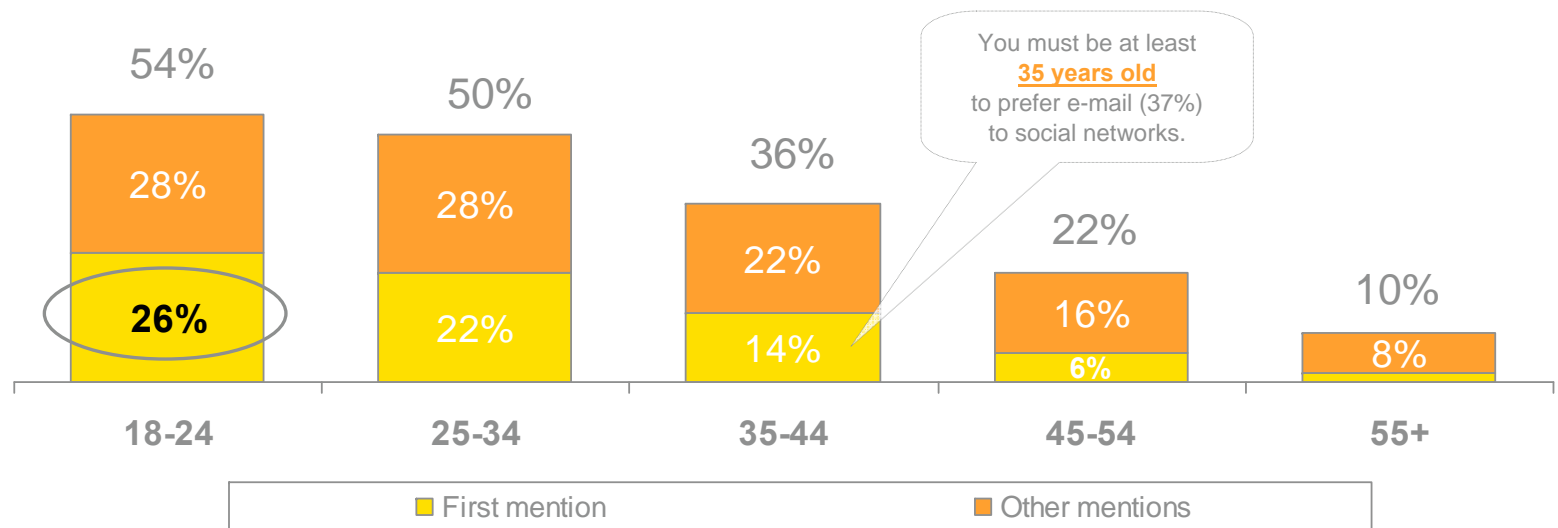
FULL
DETAILS

Q6-7. When you want to share information or discoveries that are important to you with your friends, what do you do? Are there any others? > All respondents, Canada/US/UK. (n=3,227)

Gen Y prefers social networks (26%) to e-mail (15%) for sharing information that's important to them.

" Social
media could
replace e-mail
as most
popular
means of
sharing
information"

Social networks as a means of sharing information
- By age group -

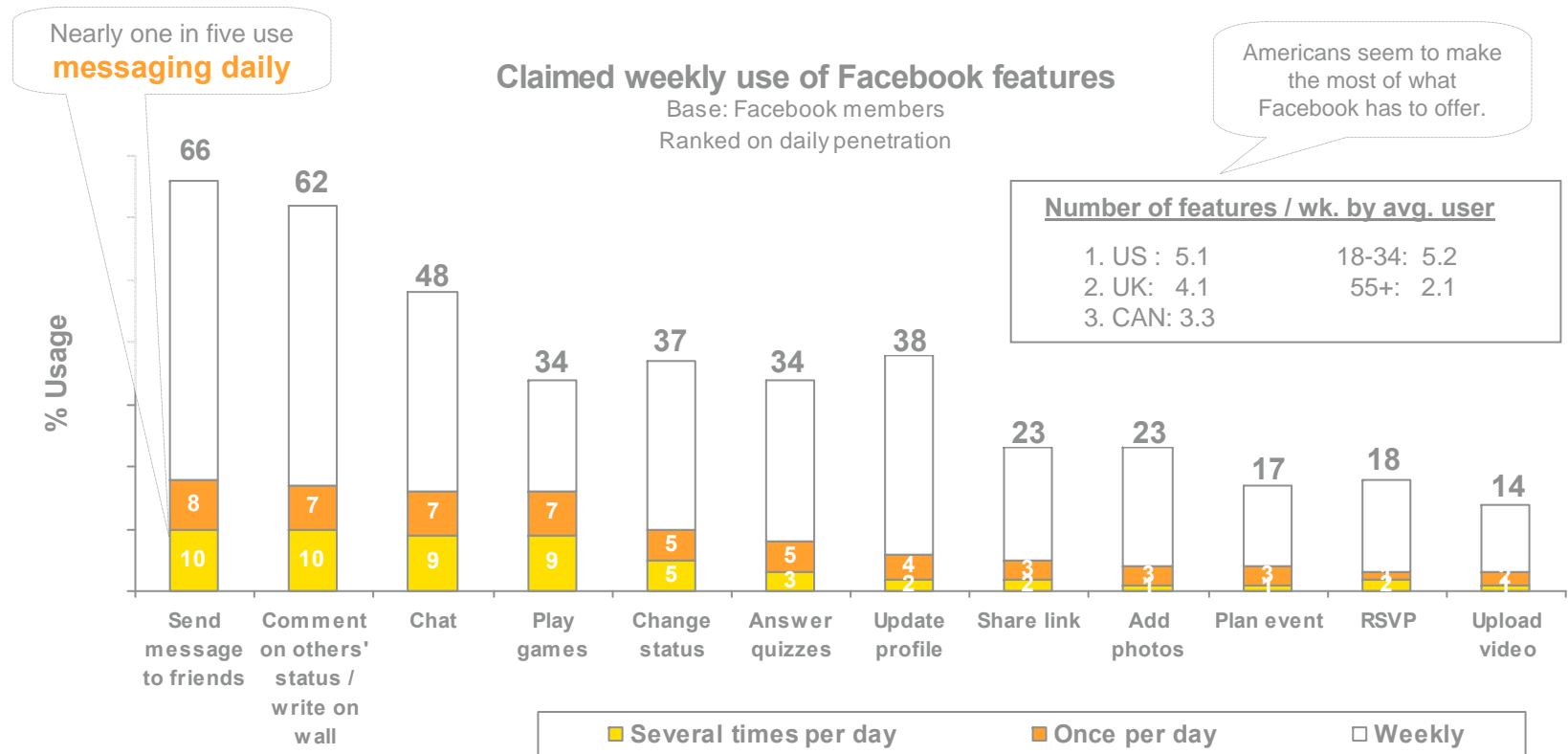


FULL
DETAILS

Q6-7. When you want to share information or discoveries that are important to you with your friends, what do you do? Are there any others? > All respondents Canada/US/UK. (n=3,227)

Messaging is the Facebook feature that members use most, reflecting top reasons for using social nets: staying in touch with friends (50%) and family (14%).

" Social media could replace e-mail as most popular means of sharing information"



FULL DETAILS

Q.22-23 What is your main reason for using social networks? Are there others? Respondents who belong to a social network (n=1,898)
Q27. You mentioned using Facebook, how often do you use the following **Facebook features**? > Respondents using Facebook in Canada/US/UK. (n=,1675)

28% of Gen Y strongly agrees* that "social networks are a **replacement to e-mail** accounts"

" Social media could replace e-mail as most popular means of sharing information"

Among Facebook Gen Y members:

More than a quarter (29%) RSVP at least once per week;

Two thirds personally use the feature to announce their own events.



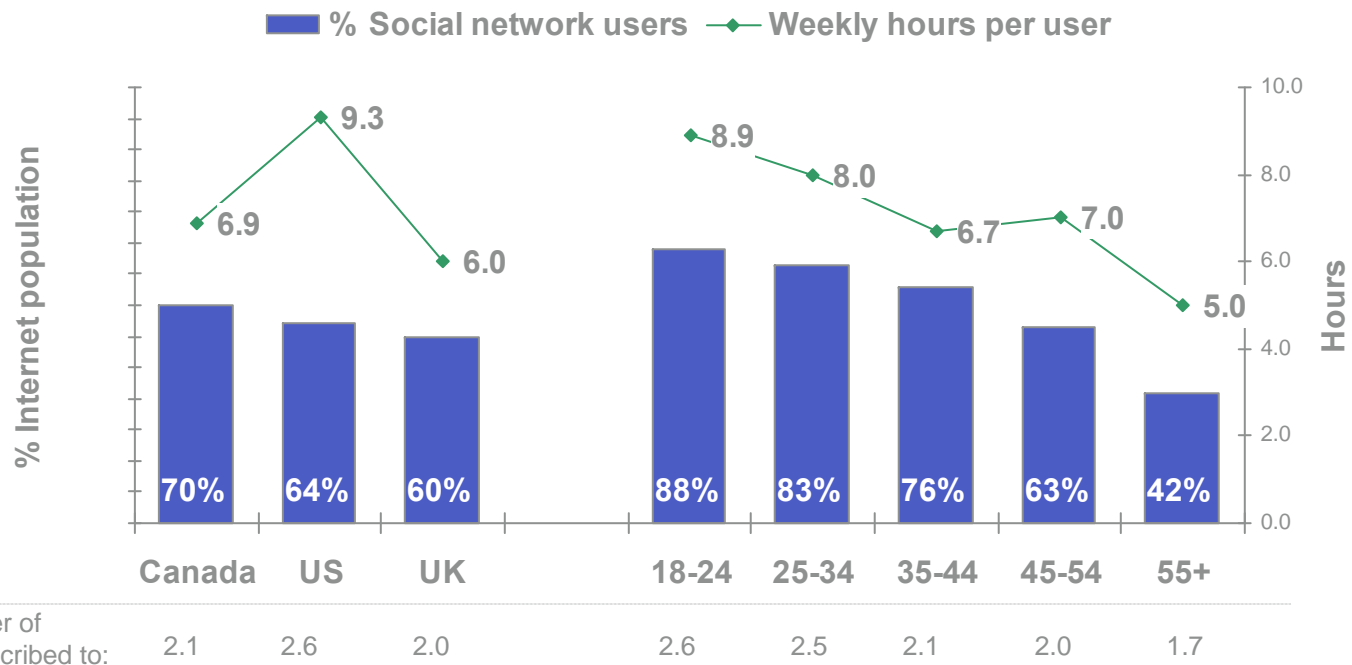
FULL
DETAILS

*: 8-10 on a 10 point scale
All respondents Canada/US/UK. (n=3,227)

Facebook (not Twitter) is
poised to be next Google.
But social media **behaviour** is
more than social networks.

More Canadians have registered **social network profiles** (70%), but Americans are spending more time (9.3 hours).

Gen Y is more active in more networks (avg. 2.6), as is the case for men (2.4) compared to women (2.0).



Q14. How many hours did you spend on the Internet last week surfing, sending e-mails, chatting, gaming online or doing other activities? (n=3,227)

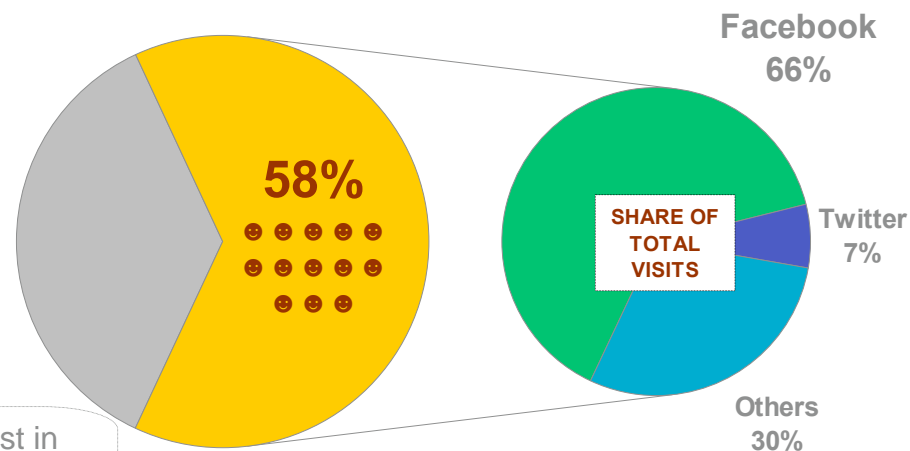
Q17. Do you belong to an online social network (e.g.: Facebook, MySpace, Windows Live Spaces, other) n=3,227

Q18. You mentioned spending the following amount(s) of time online last week doing different activities, how many of these hours are spent using online social networks? > Respondents who belong to an online social network (n=1,831)

58% of internet users visit a social networking site on average **13 times per week.**

" Facebook (not Twitter) is poised as the next Google. But social media behaviour is more than social networking."

Two thirds of all social networking activity occurs on Facebook



Usage rate is highest in Canada, where Facebook completely dominates.

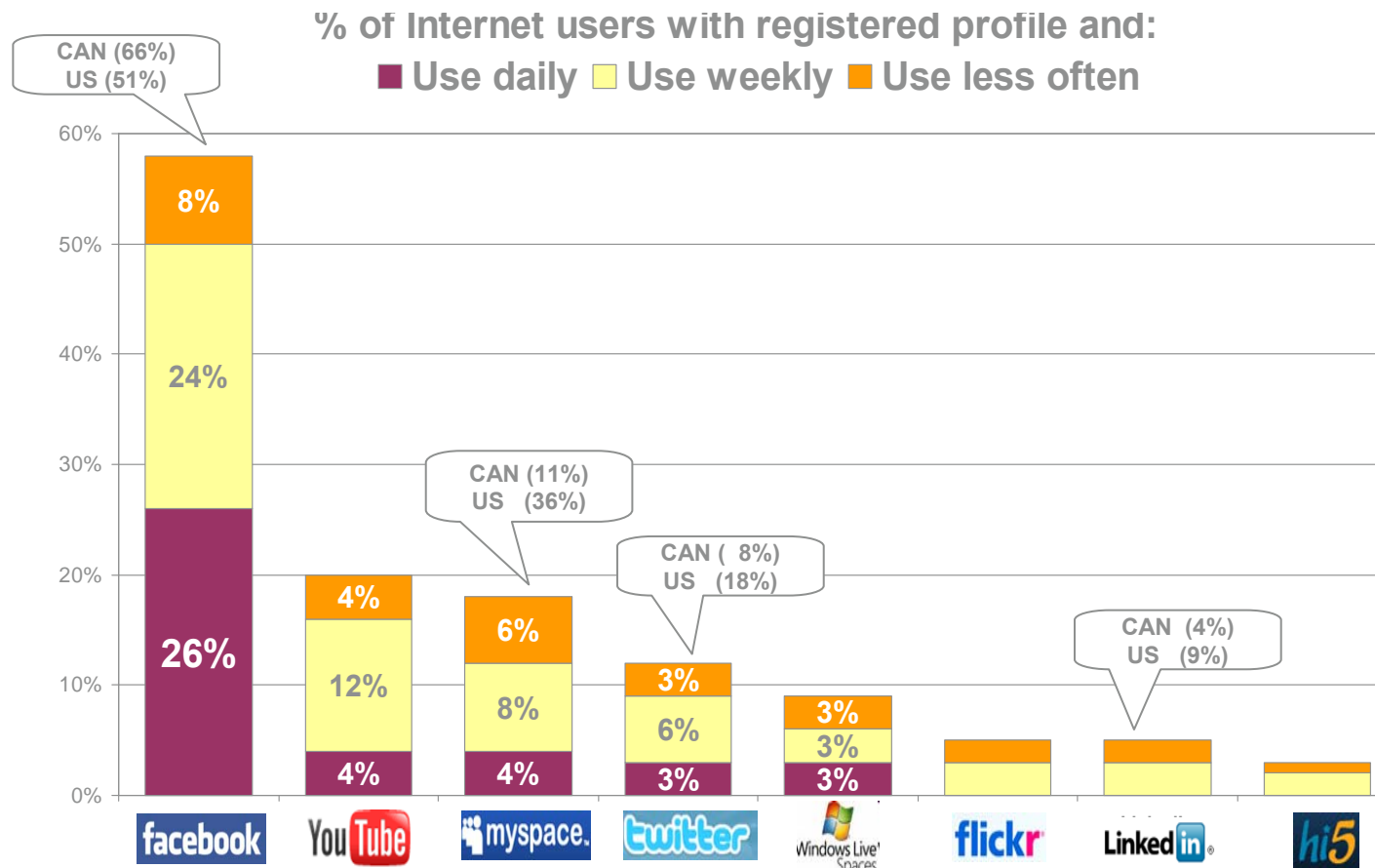
	<u>CAN</u>	<u>US</u>	<u>UK</u>
Weekly Use	61%	56%	54%
Frequency	12.2	16.4	11.4
Facebook	79%	48%↓	72%
Twitter	3%↓	8%	9%

All respondents Canada/US/UK. (n=3,227)

FULL
DETAILS

Facebook has more members logging in daily (26%) than any other network has members.

" Facebook (not Twitter) is poised as the next Google. But social media behaviour is more than social networking."



FULL
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All respondents Canada/US/UK. (n=3,227)

Other meaningful social media behaviour not necessarily tied to social networks.

" Facebook
(not Twitter)
is poised as
the next
Google. But
social media
behaviour is
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networking."

FULL
DETAILS



19% leave comments on news sites...
and **45%** take time to read them.



29% read **blogs** or personal web pages 8.5 times per week.
... leaving a comment 72% of the time.



39% follow **links** 6.9 times per week
to content others have found interesting.



32% rate things
4.4 times per week.



58% answer simple polling questions.



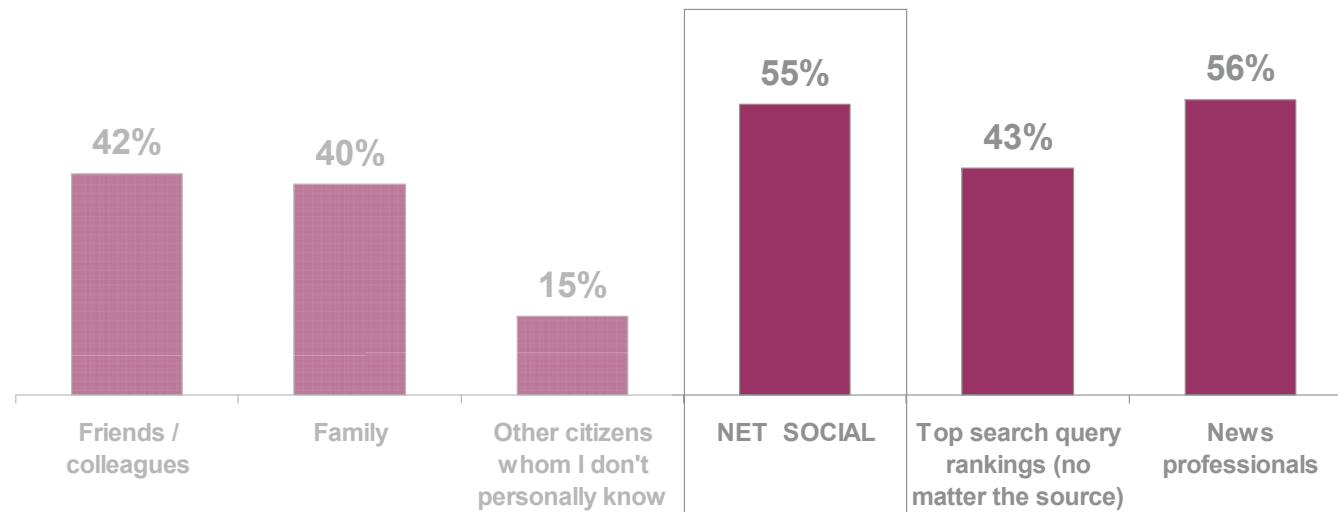
53% consider other peoples' opinion
that they left online about products or services

Consumers **ARE** turning
to social media for
news and
product information.

55% of the online population consults **user generated NEWS media**, challenging professional journalism (56%) as a source of information.

" Consumers ARE turning to social media for news and product information."

Considering news and current affairs on the Internet, do you ever consult information that is produced by _____ ?



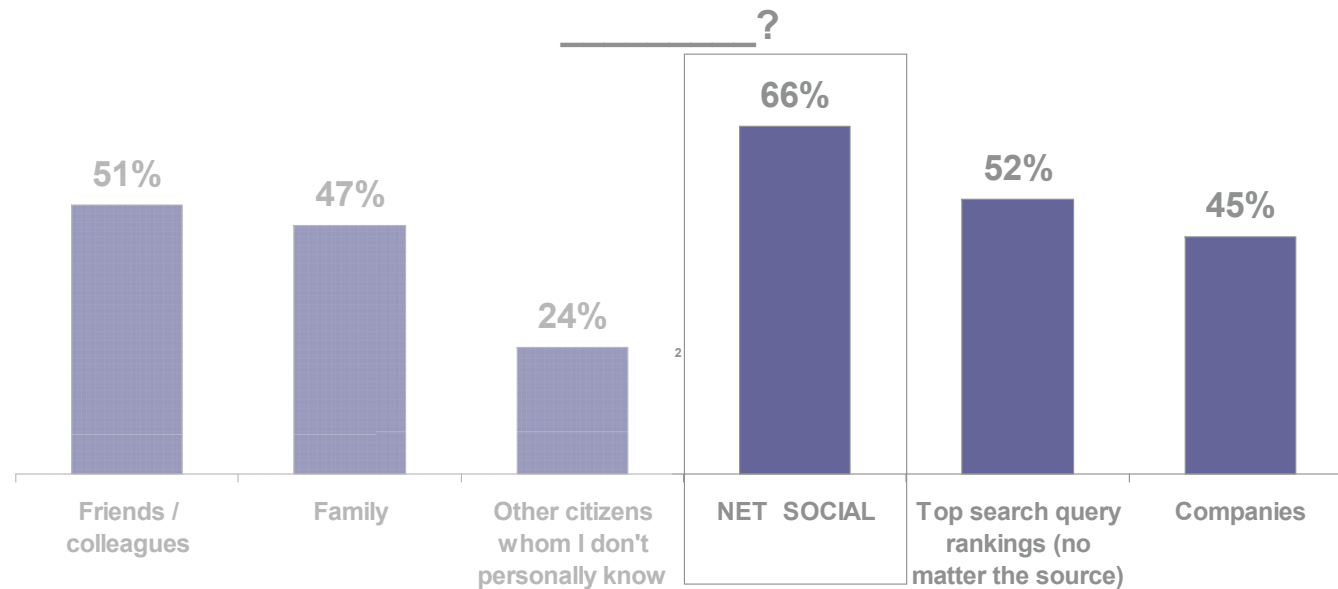
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DETAILS

Q10 - Considering news and current affairs on the Internet, do you ever consult information that is *produced* by _____? (n=3,227)

More people claim to consult **product info produced by other consumers** (66%) than top results in a search engine query (52%), or what companies produce themselves (45%).

" Consumers ARE turning to social media for news and product information."

Considering products and services on the Internet, do you ever consult information that is produced by



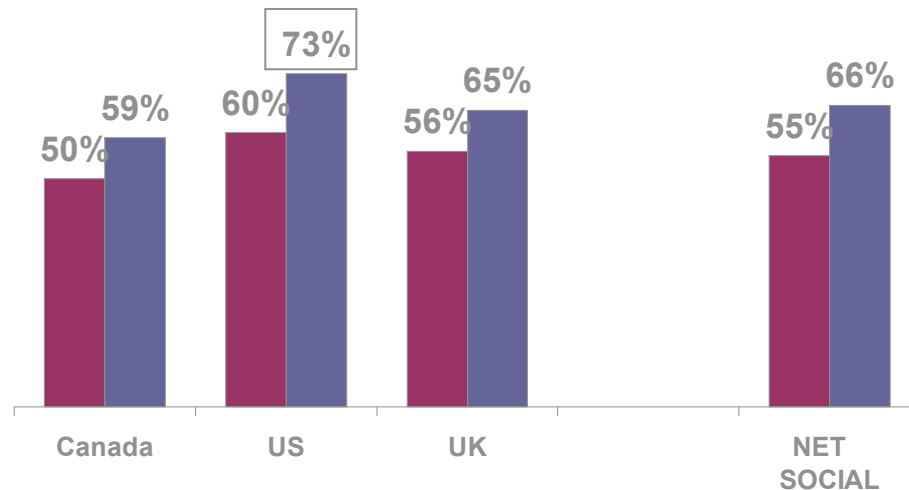
FULL
DETAILS

Q11 - Considering products and services on the Internet, and excluding advertising, do you ever consult information that is **produced** by _____?
(n=3,227)

Net use of social media is high in all three markets surveyed, although **Americans are more active** than Canadian or British citizens, especially concerning product information.

Consult information
produced in social media*
to inform themselves about:

■ News ■ Products



*: Social Media

Is characterized as online information produced by:

- Friends / colleagues
- Family
- Other citizens

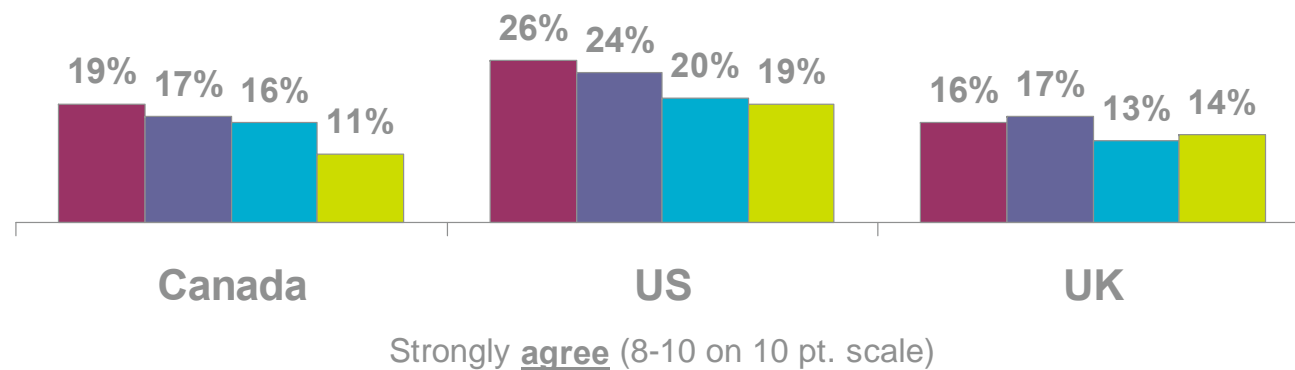
Q10 - Considering **news and current affairs**, do you ever consult information that is **produced** by _____? (n=3,227)

Q11 - Considering **products and services**, and excluding advertising, do you ever consult information that is **produced** by _____? (n=3,227)

Americans seem generally more **cynical** of formal **news organizations**, which may explain at least in part why they are more active with social media.

“ Information about news and current affairs that is generated by other citizens is **MORE CREDIBLE** than information found... ”

■ On television programs ■ In newspaper stories ■ In radio shows ■ In magazine articles

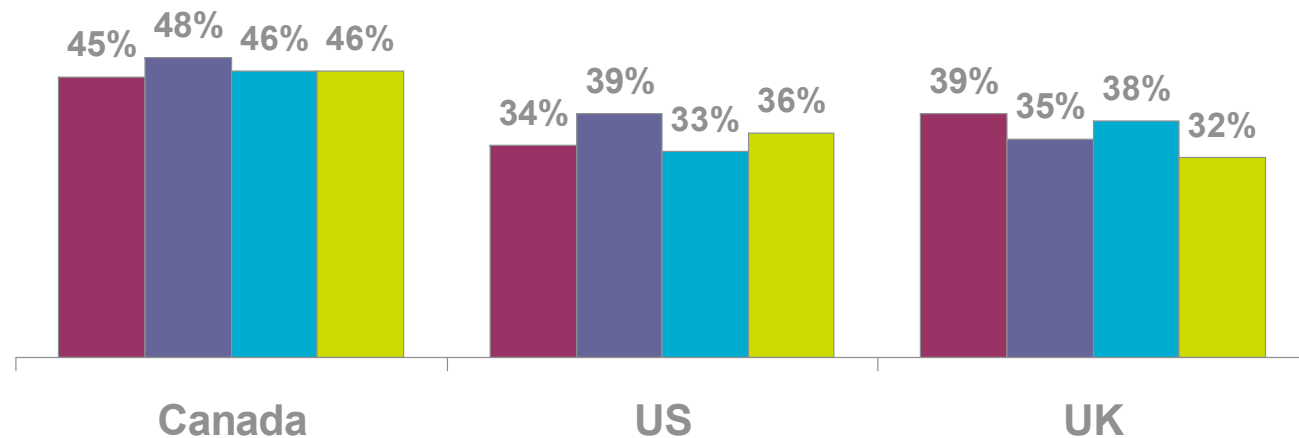


Total sample: CAN /US /UK (n=3,227)

Canadians on the other hand are most likely to **defend** the credibility of their news organizations against citizen media.

“ Information about news and current affairs that is generated by other citizens is **MORE CREDIBLE** than information found... ”

■ On television programs ■ In newspaper stories ■ In radio shows ■ In magazine articles



Strongly disagree (1-4 on 10 pt. scale)

Total sample: CAN /US /UK (n=3,227)

YES, consumers
DO talk about
brands online.

“Las week”, **77%** of internet users **engaged** with online information about a product or a brand.

“ Consumers DO talk about brands online.”

One third shared

information or opinions with other users online

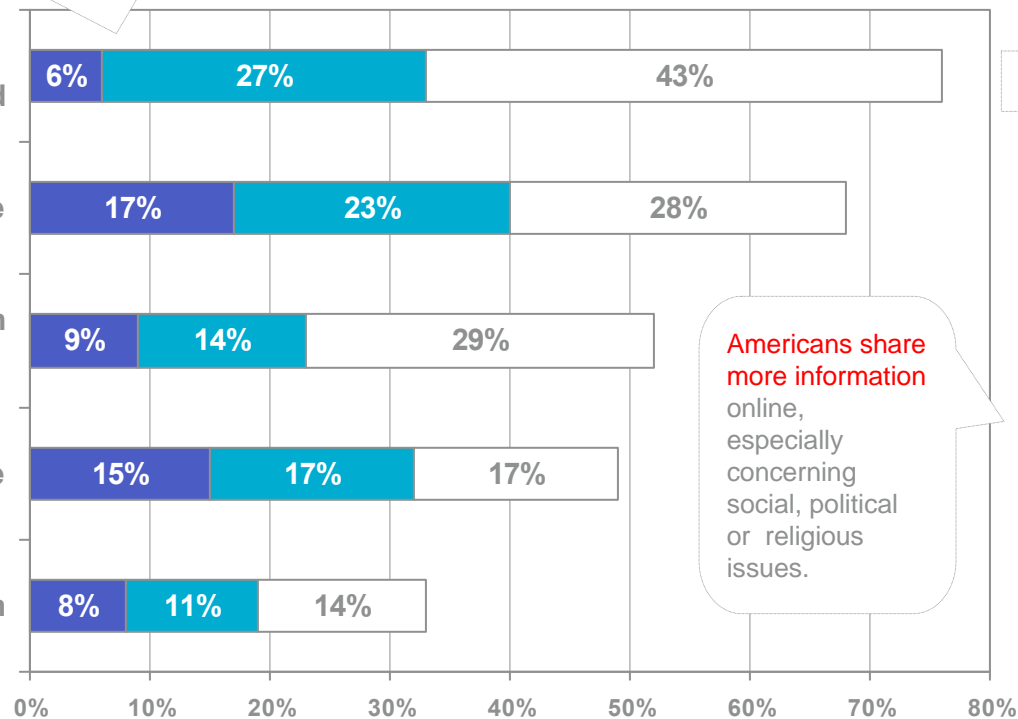
Product, service, company or brand

Activity or pastime

Personal or health issue

Social issue

Politics or religion



Shared
Can. / US / UK

30% / **41%** / 23%

40% / **44%** / 36%

25% / **28%** / 16%

27% / **50%** / 27%

16% / **32%** / 12%

Americans share more information online, especially concerning social, political or religious issues.

■ Shared with others last wk. ■ Shared AND looked □ Looked for last wk.

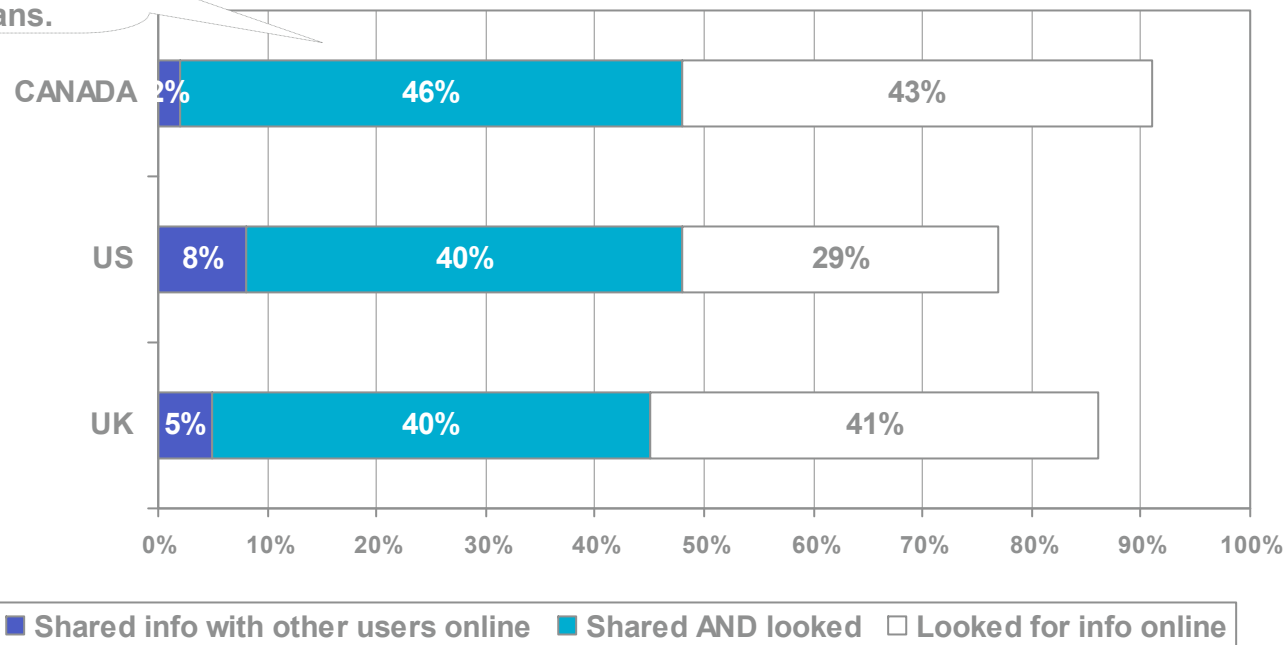
FULL
DETAILS

Gen Y is more likely to be spreading the word about companies or products, reinforcing how they use brands to accentuate their social status, both on and offline.

" Consumers
DO talk
about brands
online."

Young Canadians
share as much (48%)
as Americans.

Adults 18 - 24 online activity in past week
relating to a product, service, company or brand



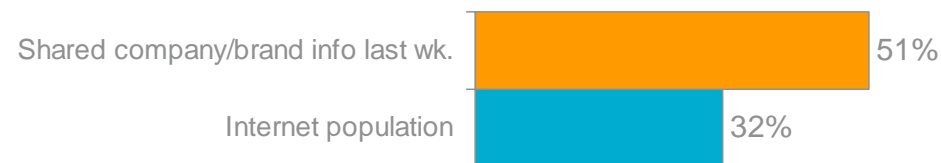
FULL
DETAILS

Those who **share** company
or brand info online
are **curious**,
and not at all insensitive
to **advertising**.

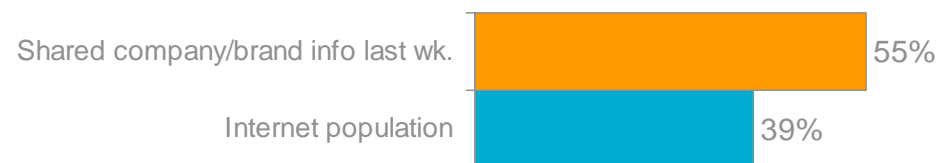
That's because **more than half** of them strongly agree* with such statements as:

" Those who share company or brand info online are curious, and not at all insensitive to advertising."

" I enjoy keeping informed about new products."



" People I know expect good advice from me about products."



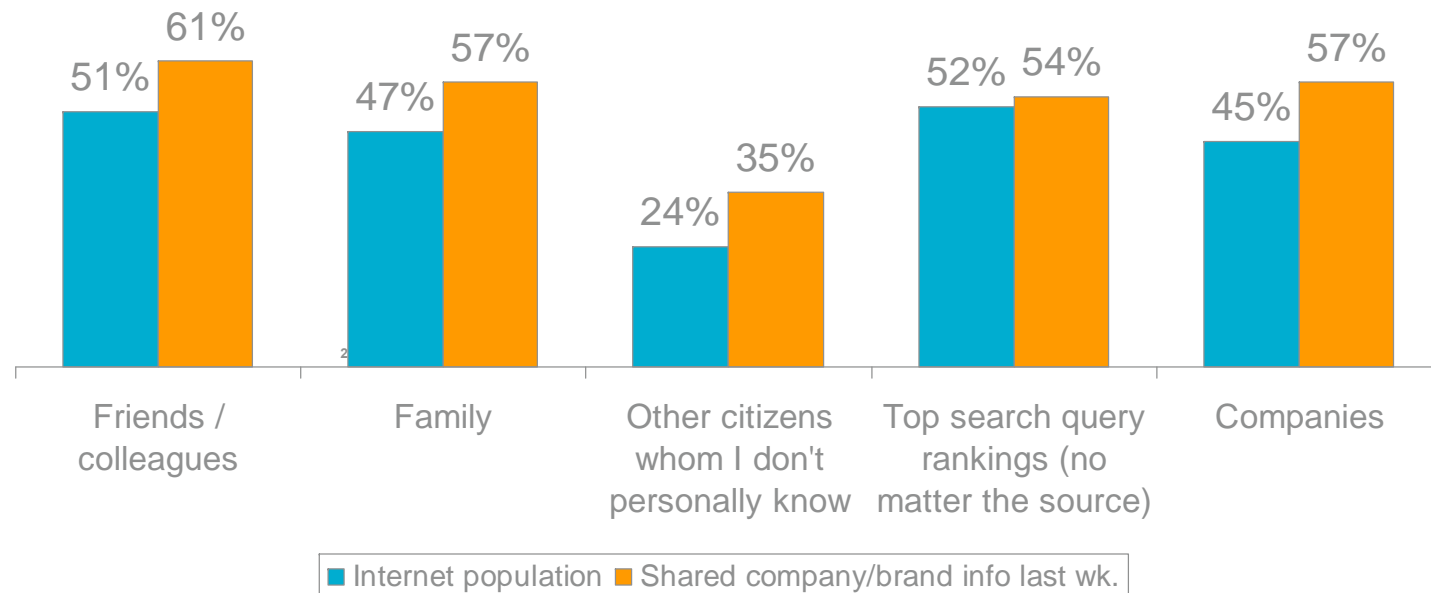
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All respondents Canada/US/UK. (n=3,227)

Consequently, they show more diligence, dig deeper and refer to **more online sources.**

" Those who share company or brand info online are curious, and not at all insensitive to advertising."

Considering products and services on the Internet, do you ever consult information that is produced by _____?

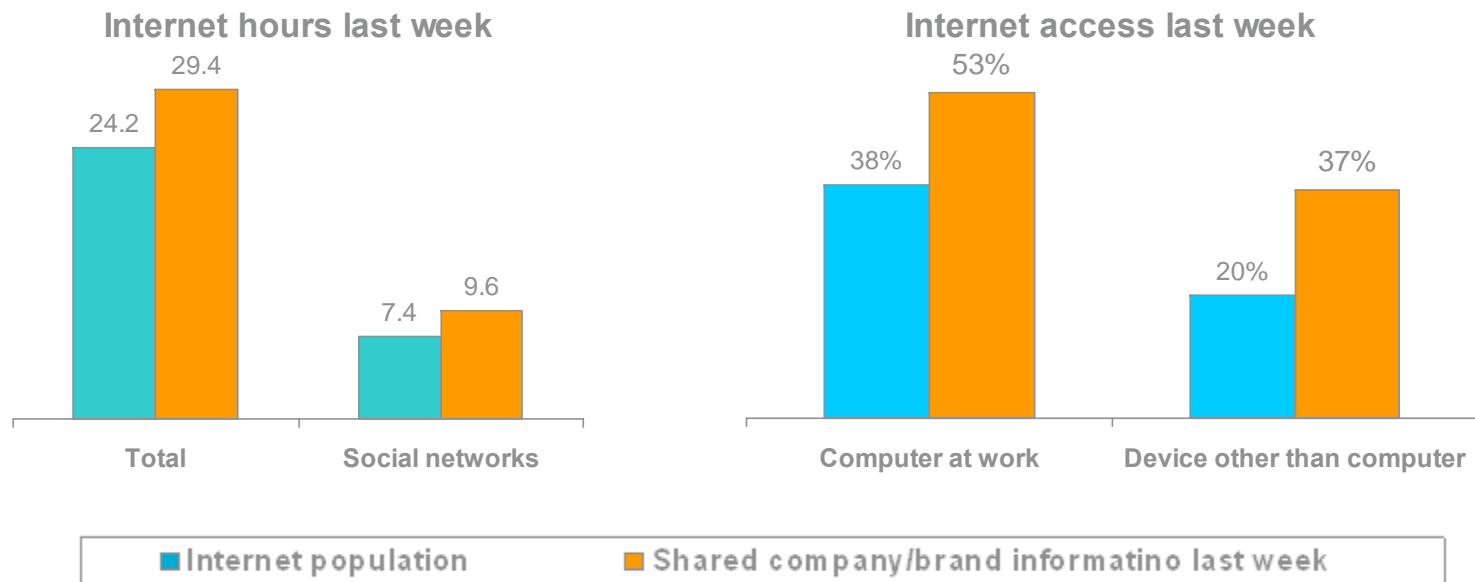


FULL
DETAILS

All respondents Canada/US/UK. (n=3,227)

They spend **more time online** and are more likely to access the Internet from **outside the home**.

" Those who share company or brand info online are curious, and not at all insensitive to advertising."



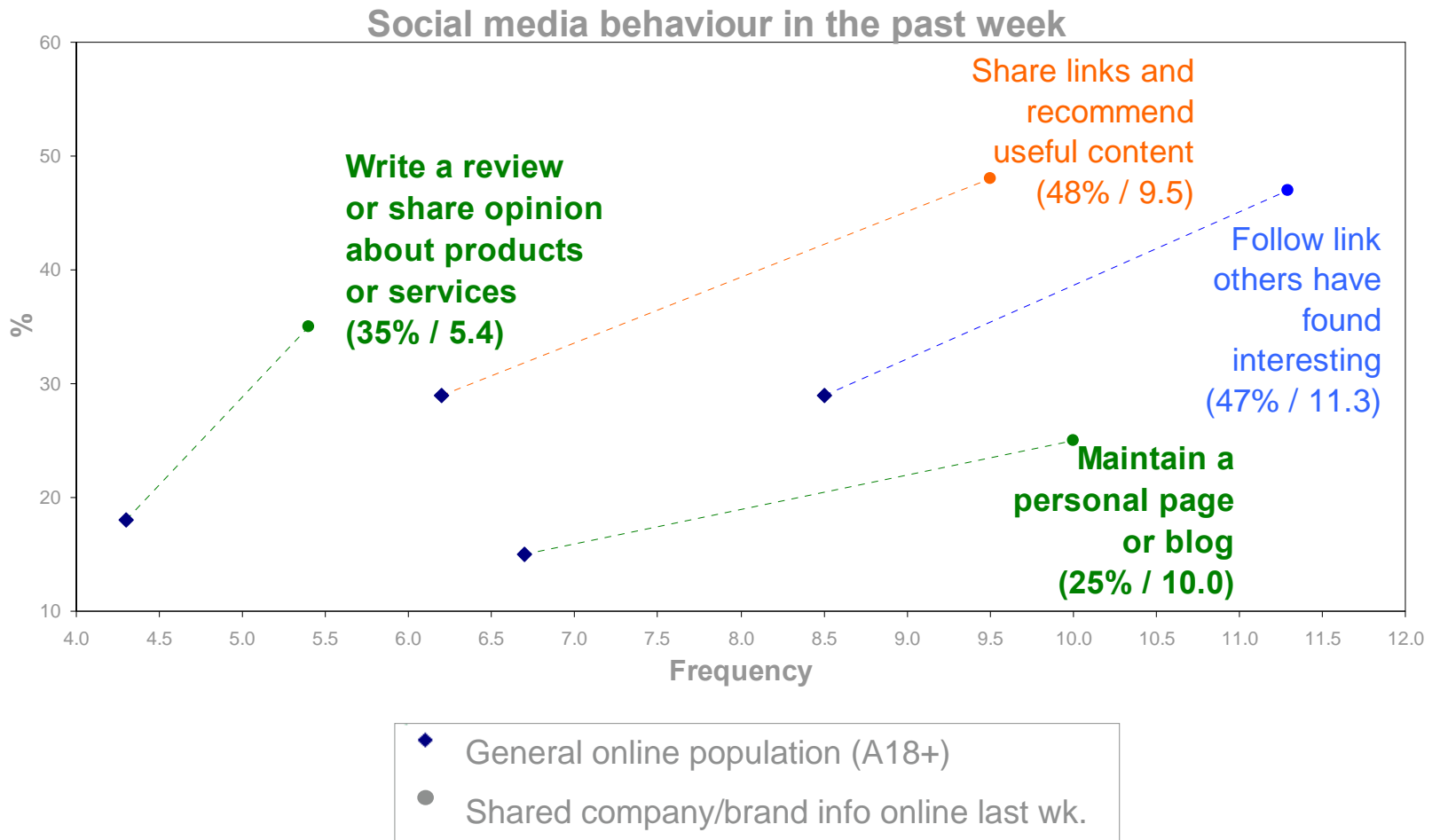
FULL
DETAILS

All respondents Canada/US/UK. (n=3,227)

They report **intense** social media habits.

" Those who share company or brand info online are curious, and not at all insensitive to advertising."

FULL
DETAILS



All respondents Canada/US/UK. (n=3,227)

And, they don't perceive advertising as being "less useful" than citizen media¹ content. In fact:

" Those who share company or brand info online are curious and not at all insensitive to advertising."

They're twice as likely to join a **sponsored online group** for a product (20%) or a company (19%).

One third strongly agrees they'd use a system that allows them to **rate and improve ads**.

One quarter that "social nets are a good place to **dialogue with companies**".

And 21% that "advertising can be **entertaining** if integrated in social networks".

1: Internet content about products or services that is produced by people whom you don't personally know

IN GENERAL

Two groups are interconnected through two types of social media **behaviour**.

A. Receivers **LOOK** and **REACT**

to what

B. Transmitters **SHARE** and **CONTRIBUTE**

Social media behaviour evolves over time alongside the technology that's allowing more of us to *react* and *share* whereas before, we could only *look* and very few could actually *contribute*.

IN GENERAL

Several **habits** were measured in this study that we feel are forming social media **behaviour**.

RECEIVERS		TRANSMITTERS	
LOOK	REACT	SHARE	CONTRIBUTE
Look at photos/videos others have uploaded	Follow links others have found interesting	Upload photos/video to share with others	Maintain a personal web page or blog
Look up or read what others are sharing about themselves	Comment on others' personal pages or blogs	Share things about yourself	Write a review about products or services
Read blogs or personal web pages	Rate things (ex: five star system)	Share links and recommend useful content	

IN GENERAL

People have always been social, talking about companies, products and services. They just never had the **mechanism** for doing it **systematically** or with any kind of **scale**.

- > The potential pay-off of social media lies in the fact that **consumers turn to other consumers** for information about companies and brands.
 - > The person who contributes or shares this information happens to be among the heaviest of social media users.
 - > And the **personal view** she transmit reduces the control an advertiser has over the brand.
- > The goals of advertising in social media:
 - > Influence how people who share brand information regard the brand.
 - > Increase the volume of contributing and sharing of brand information.
- > Some key strategies :
 - > Allow them to assimilate and appropriate the brand.
 - > Make it enviable to contribute or share brand information.
 - > Make it easy to share brand information.

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NOTE:

This is a research brief.

More information is available and we'll be happy to answer your questions or analyze the data based on your specific requirements.