

June 2012

Yellow™ Social Media Report

What Australian people and businesses
are doing with social media

97% of social network users use Facebook

“

22.65 Average number of times per week
social network users access Twitter

94%

of social network
users access social
networking sites to
catch up with family
and friends

84%

Percentage who access
the internet everyday

@

79%

of large business has a
social media presence

#

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Foreword

The popularity of social media amongst Australian consumers is an undisputed fact with a sizeable majority of us actively engaging with social media on a regular basis.

However, there still remains a sizeable gap between the social media strategies of Australian businesses and the corresponding behaviour of a large number of their customers with only 27% of small businesses and 34% of medium-sized businesses having a social media presence.

The second edition of the *Yellow™ Social Media Report* provides a fascinating insight into the ever-evolving social media activities of the Australian public and builds a compelling case for Australian businesses of all sizes to invest much more in developing social media strategies to capitalise on this dramatic shift in consumer behaviour.

The report covers the full spectrum of the social media environment in Australia including the critical role social media plays in marketing and reputation management, the notable influence blogs and reviews have on purchasing decisions, the rise in social commerce through group buying, and even the interesting social media usage patterns emerging across the different Australian states, further allowing businesses to refine their approach to social media at a local level.

AIMIA is again delighted to partner with Sensis in the development and distribution of the *Yellow™ Social Media Report*.



John Butterworth
Chief Executive Officer
AIMIA.

Executive Summary

Social media has become integrated into our everyday lives.

We access social media from the first thing in the morning, and throughout the day, with many of us checking our social media as the last thing we do before we go to bed. We use it to network professionally, connecting with our colleagues, but we hesitate before we connect with our boss as a Facebook friend. We acquired another ten social media “friends” in the past year, but we saw less than half our social media cohort face-to-face during the year. We use social media throughout our houses, from the biggest room, to the smallest. We use it when we watch television, and find that more often than not this adds to our enjoyment. Some of us create social media “aliases”, ranging from pets, children, sporting teams and stuffed toys. And despite the increasing emphasis on social media, most of us don’t think we spend too much time on social media, we reckon we have it just about right. Most of us do anyway...

And amongst all this, we interact with businesses. In fact, some of those “aliases” are our businesses that we run. In between connecting with our families, sharing photos and arranging what we are doing on the weekend, we are also looking for good deals from our favourite businesses, a discount here, a coupon there. We use social media to find things to buy and to find businesses to buy them from. Sometimes we will buy them online, but other times we will use the information we garnered from social media to go into a shop in the offline world.

Sensis, in conjunction with the Australian Interactive Media Industry Association, surveyed 1016 Australian consumers and 1,951 Australian businesses to get the real story on how social media channels are being used.

For the purposes of this report, the term social media refers to:

- Social networking websites, including Facebook, LinkedIn and Twitter
- Online blogs and online rating and review mechanisms
- Group buying websites including Cudo, Groupon, Catch of the Day, Scoopon, deals.com.au, Yellow Pages® Offers, Living Social.

The surveys discovered that while 62% of online Australians use social media, only 27% of small businesses and 34% of medium-sized businesses have a social media presence.

The findings detailed in this report aim to help Australian businesses to make more informed decisions about how to use these channels to engage with consumers.

Australians and social media

The consumer survey found that 62% of internet users have a presence on social networking sites such as Facebook, Twitter or LinkedIn. Facebook dominates the social media space, capturing 97% of social networking users. It is used by more than 90% of social media users from both sexes and all age groups, with average users spending more than six hours a week on the site. Whilst some sites have dominated in the social media space, this is sometimes at the expense of other site. People were most likely to nominate having stopped using MySpace in the past year. >

Some of the underlying social media trends that we have found since last year represent a maturing social media market. Facebook usage still dominates, with 97% of users, but strong growth has been recorded for sites like Twitter and LinkedIn, which have almost doubled the proportion of social media users that access them. LinkedIn usage has grown from 9% to 16% in a year, with the proportion using Twitter increasing from 8% to 14%.

The change in site usage has shifted over the course of the year, with Facebook users accessing the site more times a week, but for shorter amounts of time at each usage. For Twitter, the proportion of users has almost doubled in the past year, and while they are accessing the site a similar number of times in a week, each usage is now shorter in duration. LinkedIn users has also almost doubled, but the number of usages in a week has decreased to just under one per business day, with the time per usage also falling.

The increasing number of consumers using social media presents a huge opportunity for brands to connect with people, but marketers should respect how people view their social media interactions. The top reasons people use social media remain catching up with friends and family, sharing photos or videos, and coordinating social events. However approximately one in five are using social media for commercial purposes, to follow their favourite brands, access special offers and make purchases. While many consumers report taking no notice of advertising on social networking sites, around one in four do pay some attention. While only 16% of social media users said they use social networks for researching products, 40% said that the last time they used social media to research a product or service resulted in a purchase. Notably, 72% of those purchases were online, but a sizeable proportion that were researched on social media were purchased "offline", giving opportunities for businesses to use social media regardless of their business type.

There is a clear opportunity to build consumer relationships and sales via social media. The most important factor is how that connection is made. Social media users are most interested in what businesses can give them in the form of discounts (64%), giveaways (54%), product information (48%), tips and advice (41%) and coupons (41%).

Blogs and reviews have a notable influence on buying decisions, with 68% of social media users reading reviews before making a purchase decision. On average, people read almost 12 reviews before making a decision. However, only 24% of online users post blogs or reviews, so reaching that 24% of 'influencers' remains a key goal for marketers, with little change in this metric over the past year. The majority of social media users (69%) don't follow any brands or businesses on Twitter, suggesting that marketers need to carefully plan their Twitter strategy so it connects with their audience.

Some interesting social media usage patterns emerge across the different states. South Australian social media users use it an average of 11.5 times a week compared to 6.5 times for those in the ACT. Over the past year we acquired, on average, an additional ten friends and followers. While we now have on average 227 social media relationships, we have seen less than half these people face-to-face in the past year. Social media users in Western Australia and the Northern Territory have the lowest average number of social networking 'friends' at 190, compared to 253 for Victoria.

Group buying is a growing option for marketers, with 21% of social media users now accessing group buying sites, up from 12% last year. Those in their 30s are most likely to use group buying sites. Cudo is the most commonly accessed group buying site followed by Groupon, Catch of the Day and Scoopon. >

64% of social media users want discounts from businesses' social media sites



Australian businesses and social media

While the proportion of SMEs that had a social media presence was below the proportion of consumers using it, it has grown considerably in the past year. The proportion of small businesses with a presence increased from 14% to 27% with increases also recorded for medium and larger businesses. As with consumers, Facebook was the dominant form of social media presence for businesses.

SMEs in the cultural, recreational and personal services sectors were most likely to have a social media presence (58%), compared to only 10% of building and construction SMEs. Social media presence varied less by location than by industry, however the highest proportion of SMEs with a social media presence was in the ACT (34%) with the lowest in Victoria (23%).

Average social media spends increased over the past year, with small businesses that use social media spending on average \$3,410, compared to \$16,920 for medium businesses and over \$100,000 for large businesses. The amounts spent by businesses has increased strongly over the past year, with small business social media spend up on average \$1360 in the past year. Medium businesses have increased their spend by \$10,420 in the past year on average, and large business spends up \$21,730. For small and medium businesses this represented an almost doubling of the proportion of their marketing budgets devoted to social media. Large businesses were likely to have invested in structures for social media, with a median of 4 employees and an average of 54, demonstrating the large emphasis that some organisations are currently placing on social media. Large businesses were likely to have social media policies for staff, and the majority had social media training. While small businesses mostly update their social media weekly, large businesses are more likely to be doing it on a daily basis.

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. Despite this they do have a good feel for whether their social media has been successful, with most measuring it by the number of connections they have. Social media usually attracts less than 5% of total marketing budget, with the majority of businesses expected to spend the same or more on social media in the next 12 months.

Despite the investment in social media, a quarter of small businesses have no strategy to drive traffic to their sites. The most popular method across all business sizes was to put links to social media on the business website. A quarter of large businesses reported paying for advertising on other websites to drive traffic to their sites.

The research indicates businesses are still focused on establishing, maintaining and updating their social media presence rather than driving people to it. Social media plays a critical role in marketing and reputation management, one that is being underestimated by many brands and businesses. The research found that these indicators are being used by larger businesses to measure their social media success, but not by smaller businesses.

Despite the lack of strategic direction behind many businesses' social media presence, it remains a key area of growth. A sizeable proportion of businesses are expecting to spend more on social media in the coming year, with few expecting to decrease spends. At the larger end of the business scale, some of this will come at the expense of other marketing activities, such as print advertising, but for many businesses they are not planning to cut other budget areas to increase their social media activities, indicating a belief that they will make a return on the additional investment.

With social media now pervasive in our everyday lives, it is increasingly important for businesses to understand how consumers use it, to ensure that their increasing investments in this area help their business both in the online world, as well as the offline.

Methodology

This report contains the results of research conducted by Sweeney Research between January and March 2012.

Consumer survey

The research consisted of a telephone survey among 1,016 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 in March/early April 2012. 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	118	58	60
20 to 29 years of age	145	66	79
30 to 39 years of age	159	69	90
40 to 49 years of age	173	83	90
50 to 64 years of age	230	110	120
65 plus years of age	191	94	97
Total	1016	480	536

1016

randomly selected respondents
across Australia

March/April 2012



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 2012 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 30 January to 21 February 2012.

The findings for large business (200+ employees) are based on a separate survey conducted among 151 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 early March 2012. Total sample sizes by business size are shown in the table below.

Sample size - business

Number of employees	Sample
1 to 2 employees	726
3 to 4 employees	312
5 to 9 employees	297
10 to 19 employees	189
Total small business	1524
20 to 99 employees	241
100 to 199 employees	35
Total medium business	276
200 to 999 employees	86
1,000+ employees	65
Total large business	151
Grand total	1951

1,800

Number of SME proprietors interviewed from across Australia

Jan/Feb 2012



Section 1

The General Public and Social Media

#

20.6

Average number of times
per week social media users
access Facebook

98%

Percentage of social media
users who use social
networking sites at home

71%

Percentage of 14-19 year old social
media users who have more than
200 friends, contacts or followers

85%

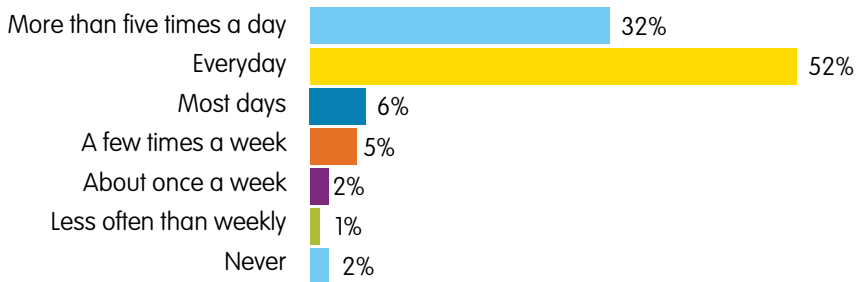
Percentage of 30-39
year old social
media users who
would connect with
their boss on LinkedIn

@

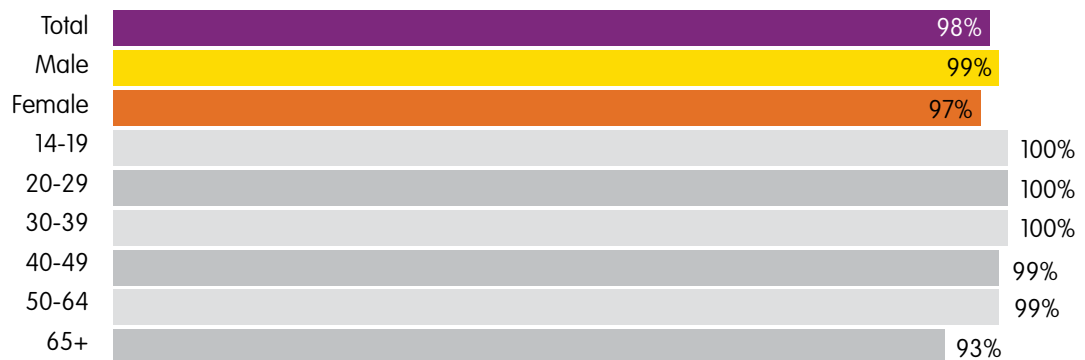
Internet Access

All but 2% use the internet and qualified for the survey. Internet usage is near-universal across all age groups until we reach 65+ where it drops to 93%.

Frequency of internet use

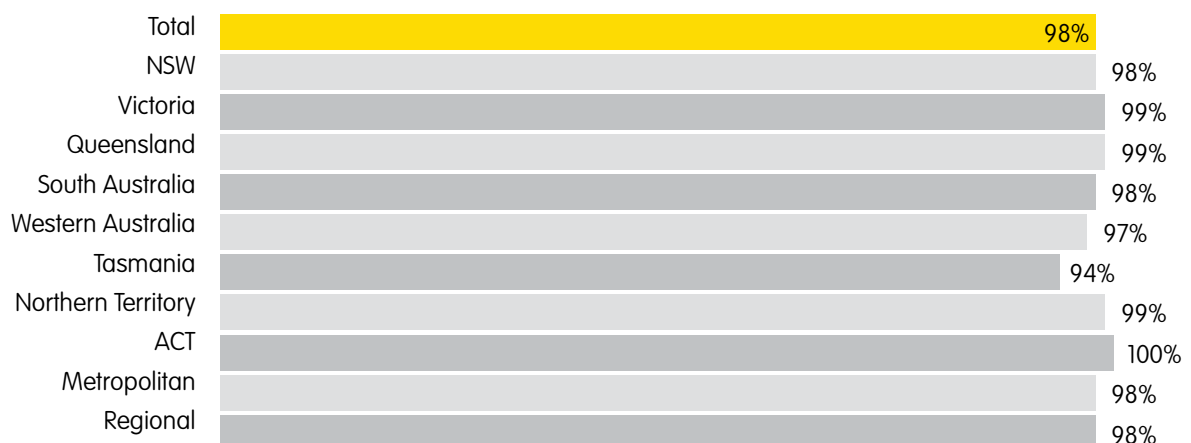


Proportion who access the Internet



Internet usage was also almost universal around the states and territories, with the exception of Tasmania, where internet usage was at 94%.

Proportion who access the Internet by location



Base: All contacts (1034)

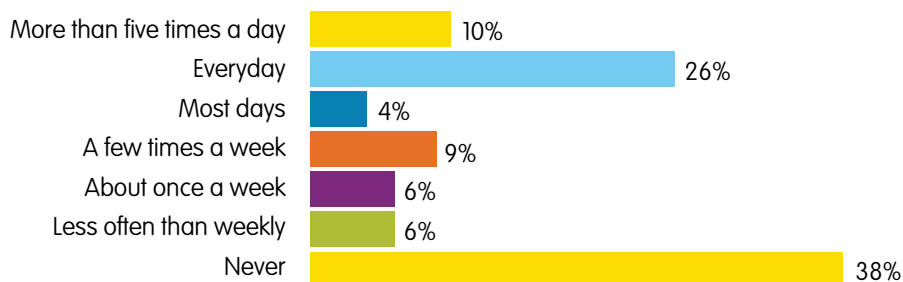
Q: How often, if at all, do you access the Internet – either on a computer or on your mobile phone or other devices such as an iPad or iPod Touch?

Social networking site usage

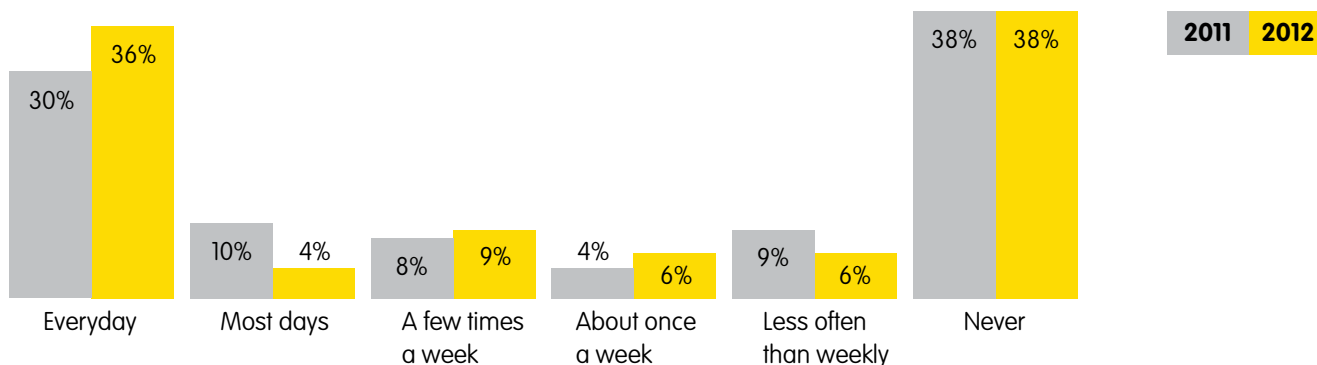
Among Internet users, some 62% use social networking sites such as Facebook, Twitter, MySpace or LinkedIn. Some 36% use social networking at least every day, with one in ten using it more than five times a day. Most of the balance access social networking sites at least a few times a week.

Based on all internet users, the average frequency of accessing social networking sites is 10.3, down from 12.4 times per month in 2011.

Frequency of using social networking sites



Frequency of using social networking sites - trends



Base: All Internet users (1016)

Q: How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?

6%

The increase from 2011 in people accessing social media everyday

”

Social networking site usage by age and gender

Females are more likely than males to use social networking sites and are more likely to be frequent users. There are big variations by age group – with almost all of those aged under 30 (90%) using sites and the majority using everyday. Those aged over 40 are substantially less likely to be users overall.

Frequency of using social networking sites

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
More than five times a day	10%	10%	11%	19%	26%	16%	2%	4%	0%
Everyday	26%	24%	29%	46%	46%	27%	22%	18%	9%
Most days	4%	3%	5%	6%	5%	3%	3%	4%	3%
A few times a week	9%	8%	10%	12%	10%	9%	10%	7%	7%
Once a week	6%	8%	5%	3%	2%	7%	7%	11%	4%
Less than weekly	6%	7%	6%	1%	3%	9%	12%	5%	6%
Never	38%	41%	35%	13%	8%	29%	43%	51%	71%

Base: All Internet users (1016)

Q: How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?

46%

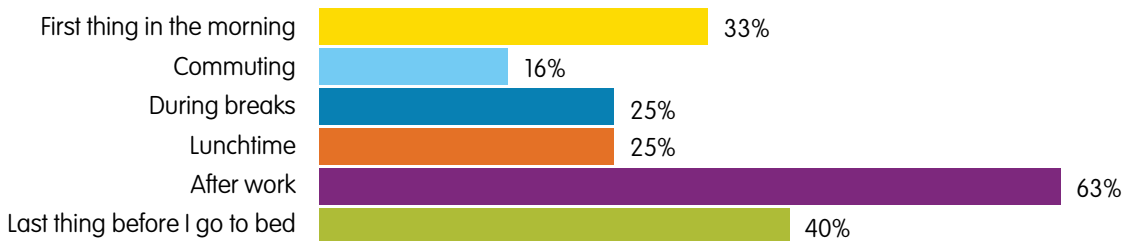
of 14-19 year olds access social networking sites everyday

”

Social media usage by time of day

While Australians tend to access social networking sites throughout the day, with one in three social networkers looking at them first thing in the morning and four in ten checking as the last thing before bed, after work was the most popular time to check our networks, with 63 per cent of Australians who socially network reporting usage after work. While most times of the day were similar between males and females, males were significantly more likely to use social networking sites while commuting, during breaks and at lunchtime.

When we socially network...



	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
First thing in the morning	33%	34%	32%	19%	35%	36%	36%	34%	36%
Commuting	16%	20%	12%	15%	29%	18%	10%	5%	5%
During breaks	25%	31%	19%	18%	30%	33%	20%	24%	9%
Lunchtime	25%	31%	19%	23%	31%	30%	22%	19%	15%
After work/school	63%	63%	63%	76%	74%	59%	60%	55%	38%
Last thing before I got to bed	40%	42%	38%	48%	41%	44%	42%	27%	36%

Base: Users of social media (606)

Q: When do you most commonly look at your social networking sites?

63%

Percentage who socially network after work



Social networking site usage by location

Usage levels varied across states and territories, users in metropolitan areas were more likely to be frequent users of social networking sites than those in regional areas. Users in Tasmania reported the most frequent usage, with those in the ACT reporting the least frequent visits to social networking sites.

Social networking site usage by location

	Total	Metro	Regional	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
More than five times a day	10%	12%	7%	11%	12%	9%	7%	9%	11%	9%	3%
Everyday	26%	28%	22%	22%	31%	25%	25%	29%	34%	29%	30%
Most days	4%	4%	4%	2%	5%	5%	4%	3%	8%	12%	4%
A few times a week	9%	9%	10%	13%	8%	6%	5%	8%	3%	3%	7%
Once a week	6%	7%	4%	2%	9%	7%	5%	11%	3%	8%	7%
Less than weekly	6%	8%	6%	8%	5%	5%	12%	3%	3%	8%	7%
Never	38%	35%	47%	42%	30%	41%	42%	37%	39%	29%	43%

Base: All Internet users (1016)

Q: How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?

40%

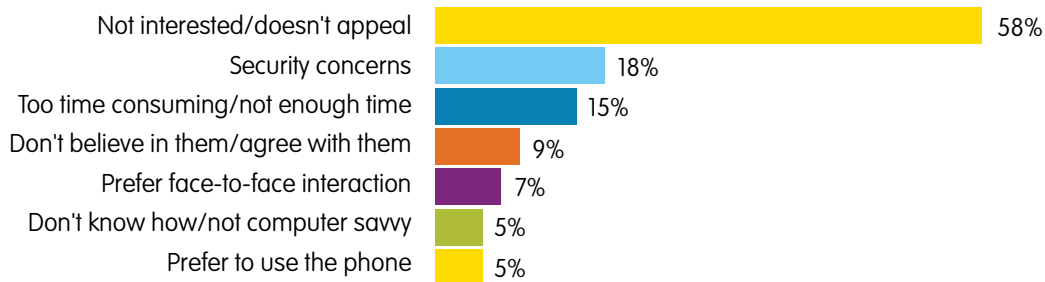
Percentage of metro users who access social networking sites everyday



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, rising from 42% last year to 58% this year. At a lower level, some are concerned about the time it would take up, security and lack of computer expertise. Other issues of concern included concerns over the security of social networking sites, as well as a view that it was too time consuming.

Reasons for not using social networking sites



Base: Non users of social media (409)

Q: Why don't you use social networking sites?

Reasons for not using social media - verbatim comments

“

“If I was going to write something about myself I'd write a diary. I don't want to attract attention from strangers.”

(Female, 50-64 years)

“Because you do not have the rights to the data you upload.”

(Female, 40-49 years)

“I am a teacher and don't wish to connect with students outside of school.”

(Female, 50-64 years)

“I don't have the knowledge or the interest.”

(Female, over 64 years)

“I prefer face-to-face interaction.”

(Female, 40-49 years)

“Just haven't gotten into it yet.”

(Female, 40-49 years)

“I find it really superficial, it's used for spying.”

(Male, 40-49 years)

“I can use the Playstation network.”

(Male, 14-17 years)

“Bitchiness amongst friends, you can say negative things on social networking that you wouldn't say in person.”

(Male, 40-49 years)

“I am a social person, I don't want to read people's stuff such as 'I am going to bed!'.”

(Male, 30-39 years)

”

Social networking sites used

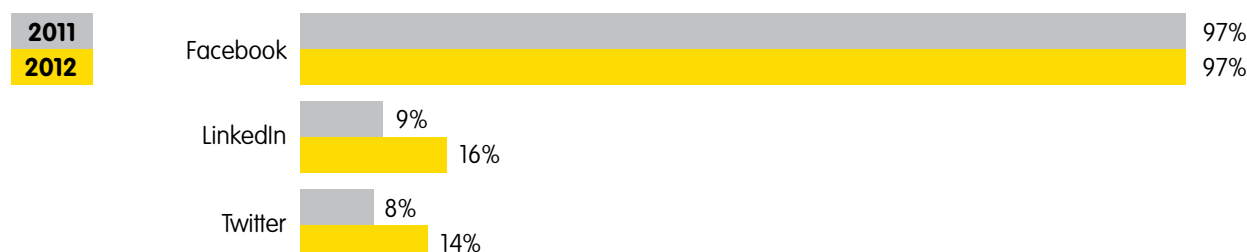
Facebook dominates as the most used social networking site, being used by 97% of social networking participants or 6 out of 10 Internet users. This was unchanged in the past year. Facebook is used by more than 95% of social media users from both sexes and at least 93% in all age groups. LinkedIn was the next most popular social media platform, being used by 16% of social networking users, up from 9% last year. Twitter was used by 14% of social networking site users, up from 8% last year, and Google+ was used by 8%.

Whilst Facebook was very popular across all age groups, other social media platforms tended to display demographic preferences. Twitter continues to be used more by the younger age groups and LinkedIn by those in their 40s and 50s.

Social networking sites used



Social networking sites used - trends



Social networking sites used

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Facebook	97%	95%	98%	97%	99%	98%	94%	93%	97%
LinkedIn	16%	21%	11%	1%	16%	12%	28%	23%	13%
Twitter	14%	15%	14%	18%	22%	16%	8%	10%	4%
Google+	8%	10%	6%	5%	11%	6%	7%	7%	11%
Other	9%	10%	9%	10%	13%	12%	7%	4%	5%

Base: Users of social media (606)

Q: Which of these social networking sites do you use?

Social networking sites used by location

Facebook dominates in all states. LinkedIn is slightly more popular in NSW and the Victoria. NSW and the ACT have the highest Twitter usage rates.

	Total	Metro	Regional	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Facebook	97%	96%	98%	95%	98%	97%	94%	97%	100%	98%	100%
LinkedIn	16%	18%	10%	26%	19%	7%	3%	6%	5%	6%	8%
Twitter	14%	16%	9%	19%	15%	10%	13%	5%	2%	9%	25%
Google+	8%	9%	5%	6%	9%	8%	10%	4%	15%	10%	16%
Other	9%	10%	8%	9%	11%	11%	10%	5%	0%	10%	10%

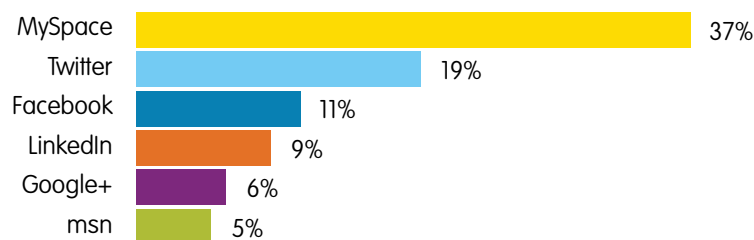
Base: Users of social media (606)

Q: Which of these social networking sites do you use?

Social networking sites stopped using during the past year

Despite strong growth in social media usage, there is significant underlying shifts between sites. Some 13% of Australian consumers that use social media reported that they had stopped using some sites during the past year. Of those that reported having dropped a social media site, MySpace was the one most mentioned, with 37% of Australians that reported having stopped using a social media site nominating MySpace. Of those that did not currently use social media, some 8% reported having dropped a channel over the past year, predominantly Facebook.

Which sites Australians dropped in the past year



Base: Stopped using a social media channel in the past year (78)

Q: Over the past year, have you stopped using any social networking channels?

Frequency of using social networking sites

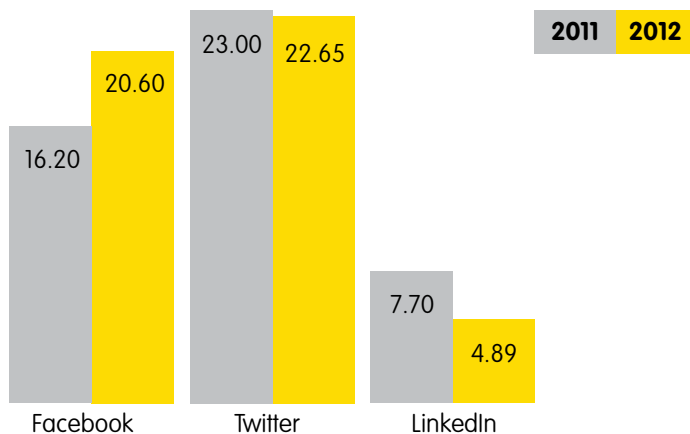
On average, Facebook users use the site around 21 times a week, up from 16 times a week in 2011. Average Twitter usage frequency is 23 times a week, unchanged from last year while LinkedIn users reported using the site almost 5 times a week on average, down from 8 times a week in 2011. Of those that did not currently use social media, some 8% reported having dropped a channel over the past year, predominantly Facebook.

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	97%	5%	18%	18%	22%	11%	25%	20.6
LinkedIn	16%	16%	34%	23%	18%	2%	1%	4.89
Twitter	14%	6%	17%	16%	26%	7%	27%	22.65

Base: Users of social media (606)

Q: In a typical week, how many times would you use Facebook/LinkedIn/Twitter?

Average usage occasions per week - trends



Base: Users of social media (606)

Q: In a typical week, how many times would you use Facebook/LinkedIn/Twitter?

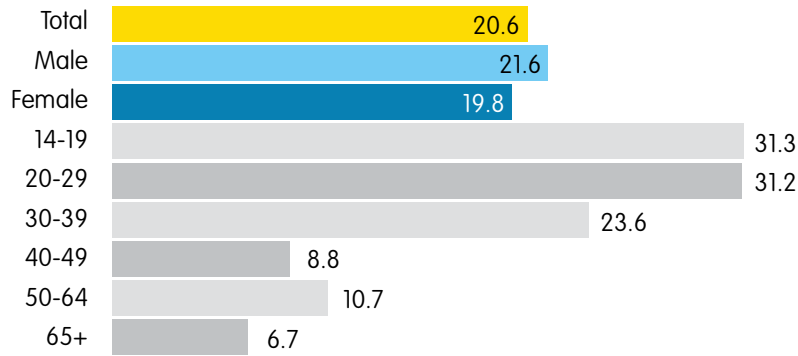
22.65

Average number of times social media users access Twitter each week.

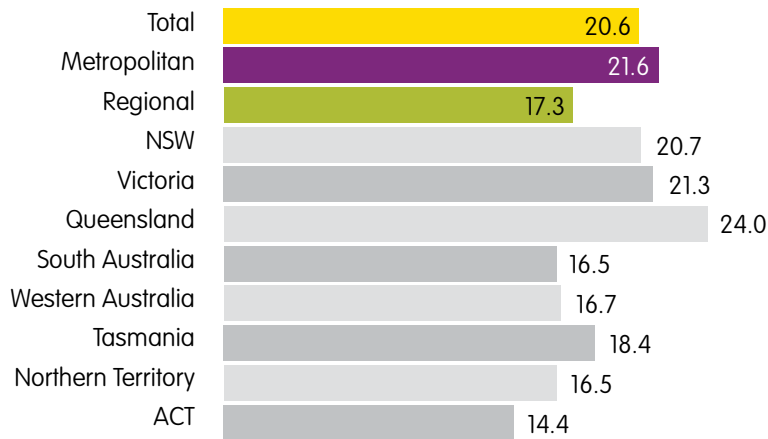


The charts below look at average usage frequency for Facebook in more detail. Usage frequency peaks at more than 30 times a week for the 14-29 year olds and is higher than average in Queensland and lower in the Australian Capital Territory.

Average usage occasions per week - Facebook



Average usage occasions per week - Facebook



Base: Users of Facebook (588)

Q: In a typical week, how many times would you use Facebook/LinkedIn/Twitter?

20.6

Average number of occasions Facebook users access Facebook each week



Time spent on social networking sites

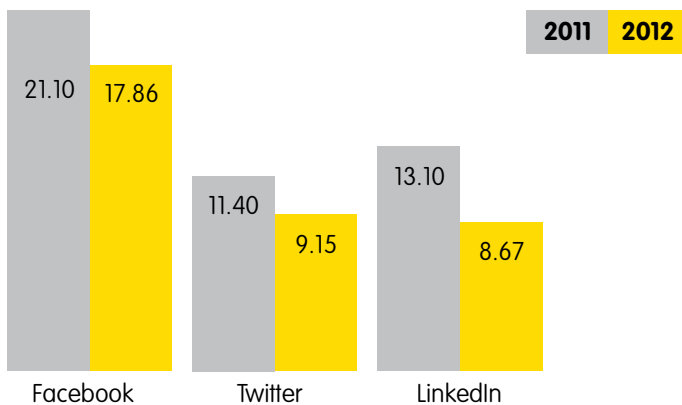
On average, Facebook users spend around 18 minutes on the site each time they access it. If the average time spent is multiplied by the average number of usage occasions, the typical user would spend more than 6 hours per week on the site. LinkedIn, Twitter and MySpace users tend to spend less time when logged on to these sites, averaging around 9 minutes per visit.

Site	Proportion who use	Average time spent on each usage occasion						Average time (mins)
		Up to 2 minutes	3 to 5 minutes	6 to 10 minutes	11 to 15 minutes	16 to 30 minutes	Over 30 minutes	
Facebook	97%	6%	21%	24%	15%	16%	17%	17.9
LinkedIn	16%	19%	40%	13%	10%	10%	4%	8.7
Twitter	14%	16%	30%	25%	11%	10%	4%	9.1

Base: Users of social media (606)

Q: And roughly how long would you spend each time you use Facebook/LinkedIn/Twitter?

Average time spent on each usage occasion (minutes) - trends



Base: Users of social media (606)

Q: And roughly how long would you spend each time you use Facebook/LinkedIn/Twitter?

8.7

Average number of minutes per session a social media user spends on LinkedIn



Users' views on time spent on social networking

Overall, Australians were more likely to feel that they had increased the time they spent on social networking compared to last year. Almost three in four felt that the time they spent on social networking was about right, but almost one in four felt they spent too much time on it. Most were expecting to spend the same amount of time in the coming year, however, of the remainder 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	31%	30%	32%	26%	22%	38%	30%	35%	44%
Decreased	26%	24%	28%	40%	34%	19%	35%	10%	15%
About the same	42%	45%	40%	34%	43%	43%	35%	55%	41%

Perception of time spent social networking

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
About right	72%	74%	71%	46%	65%	76%	81%	82%	91%
Too much	23%	20%	25%	49%	28%	19%	17%	13%	6%
Not enough	3%	5%	2%	4%	4%	5%	1%	4%	0%

Expectations for time spent social networking

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Increasing	14%	17%	11%	10%	10%	16%	16%	19%	11%
Decreasing	17%	17%	18%	47%	18%	8%	19%	9%	3%
About the same	67%	63%	71%	43%	71%	76%	64%	70%	83%

Base: Users of social media (606)

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?

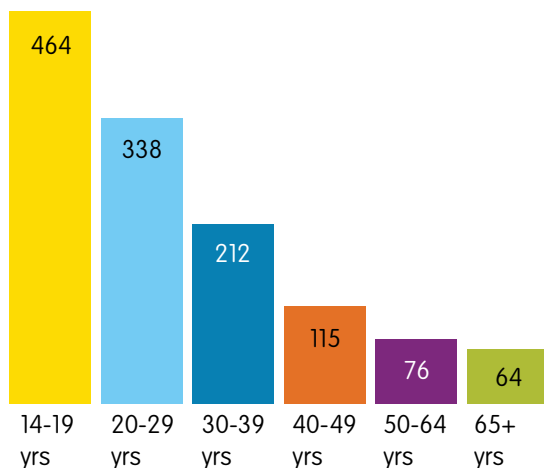
Number of friends, contacts or followers

Across all social networking users, the average number of friends, contact or followers in 2012 was 227, an increase of 10 on average over the past year. More than 50% claiming to have more than 100 contacts in their network. Females reported fewer contacts than males, but the big difference was across age groups varying from the low of 64 for the 65+ to a high of 464 for the 14-19 year olds.

Number of friends, contacts or followers

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Up to 20	14%	17%	11%	1%	2%	11%	21%	29%	30%
21 to 50	15%	14%	16%	0%	1%	12%	21%	32%	42%
51 to 100	15%	12%	18%	6%	8%	29%	21%	14%	6%
101 to 200	20%	15%	23%	16%	29%	23%	21%	12%	2%
Over 200	32%	37%	27%	71%	53%	23%	16%	8%	2%
Don't know	5%	5%	6%	5%	8%	1%	1%	6%	18%
Average 2012	227	246	211	464	338	212	115	76	64
Average 2011	217	209	224	353	257	209	127	155	117

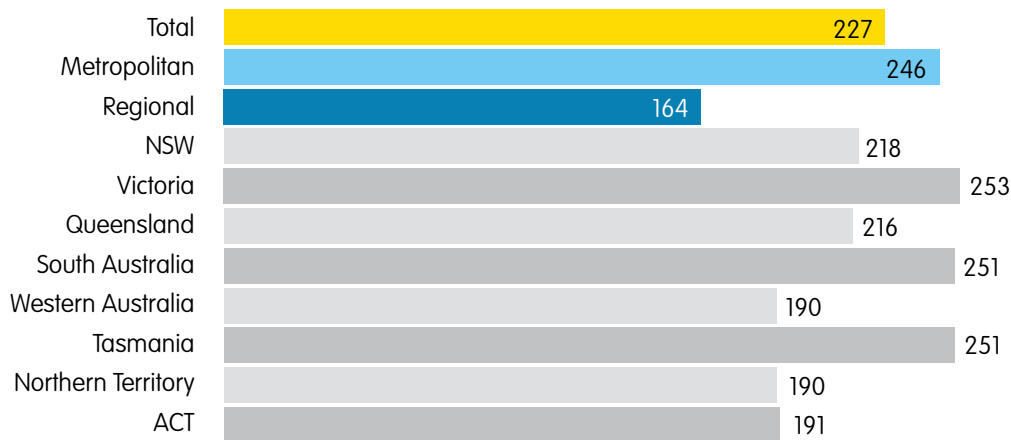
Number of friends, contacts or followers by age



Number of friends, contacts or followers by location

Analysis by location reveals that those in Victoria have the largest number of friends, contacts or followers on average. The main difference, however, was between metropolitan and regional areas, with those in metropolitan areas having, on average, 82 more friends, contacts and followers than their regional counterparts.

Average number of friends, followers or contacts by location



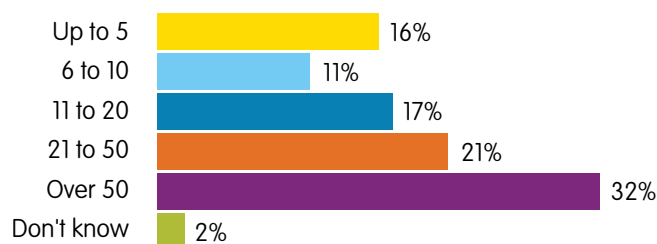
Base: Non users of social media (409)

Q: How many different friends, contacts or followers do you have on all your social networking sites?

Number of Twitter accounts followed

On average, Twitter users follow 83 accounts, up from 35 accounts in 2011.

Number of Twitter accounts followed



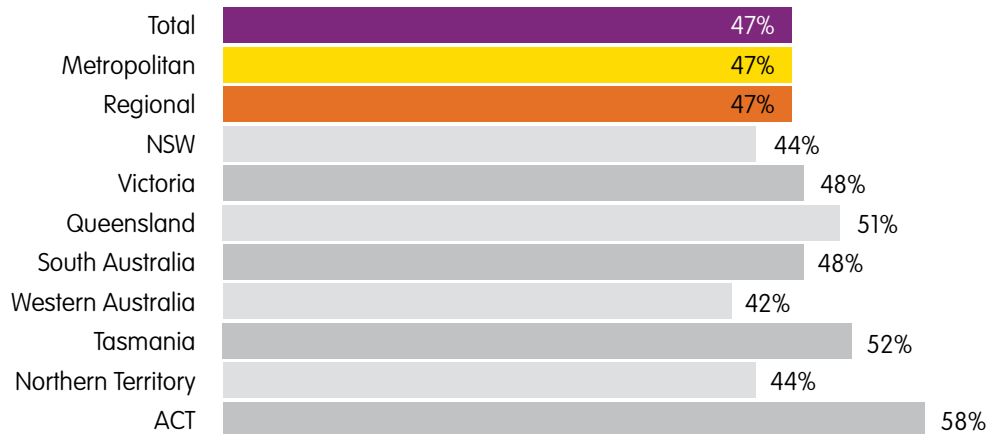
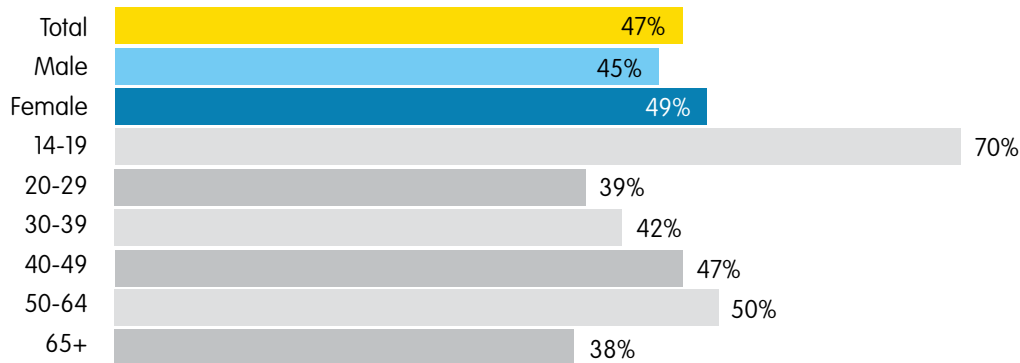
Base: Users of Twitter (75)

Q: Approximately how many Twitter accounts do you follow?

When worlds collide - interaction between our virtual and real lives

While Australian social media users have, on average, 227 friends and followers, they have seen less than half of them face-to-face in the past year. Females were slightly more likely to have seen their virtual contacts in person in the past year, with those aged 14-19 most likely to have seen their social media contacts in person. People in the ACT were the most likely to have seen their social media friends in real life in the past year.

Proportion of friends and followers seen face-to-face in the past year



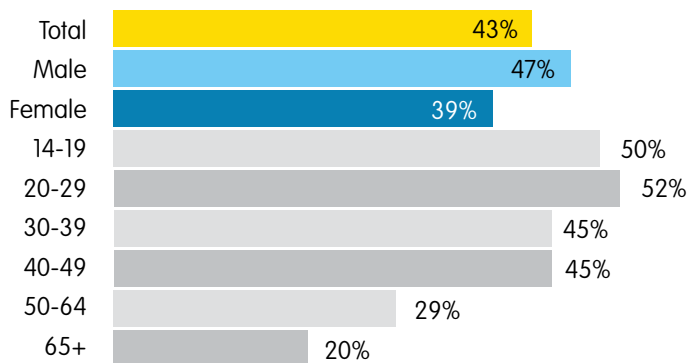
Base: Users of social media (606)

Q: What percentage of your social networking contacts would you have seen in person over the past 12 months?

Some 5% of Australians reported having a social media presence for an identity that was not their own. Mostly these were businesses (2%), however 1% each reported having a social media presence for a child or a pet, and smaller proportions reported having an identity aligned with a sporting team. Interestingly, social media aliases were predominantly in higher income demographics, with 9% of those earning \$85K and above reporting that they managed a social media presence that was not their own, with these mostly being business social media presences.

Many Australians were wary of their virtual and real worlds colliding, with the proportion willing to connect with their boss on the social media site Facebook roughly half the proportion that would connect on the professional networking site LinkedIn.

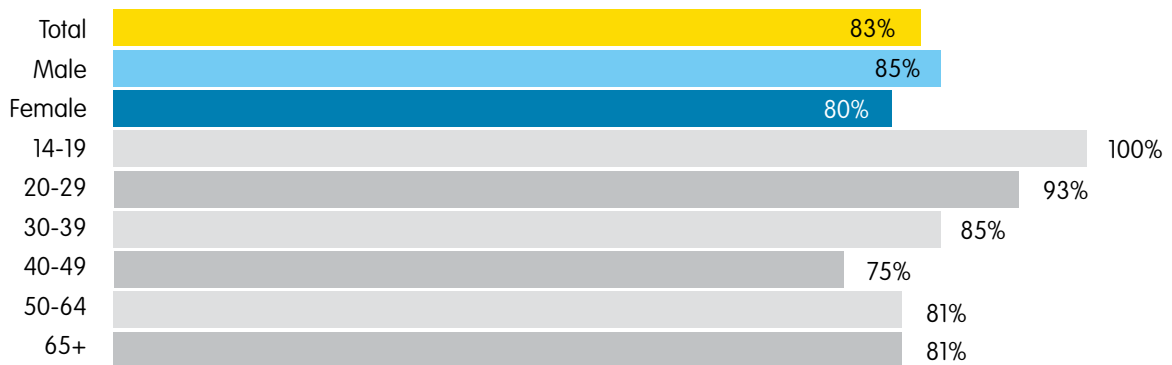
Would you connect with your boss on Facebook?



Base: Users of Facebook (588)

Q: If you were sent an invitation from your boss to connect on Facebook, would you accept?

Would you connect with your boss on LinkedIn?



Base: Users of LinkedIn (69)

Q: If you were sent an invitation from your boss to connect on LinkedIn would you accept?

Devices used to access social media

Around 7 in 10 use laptops to access their social media sites, making laptop computers the most popular device to access social media. Over half of social media users accessed sites through a desktop computer, with this being the most popular device for those in their 40s and those aged 65 plus. Strong growth was seen in those accessing social media through smartphone devices at 53%, up from 34% in 2011 and 18% using an iPad or tablet, up from 4% last year. Smartphones were the most popular device to access social media for those in their 20s. While 6% reported using an iPod Touch-type device, this was quite common amongst those under 20, with over one in four reporting using iPod touch devices to access social media.

Devices used to access social media

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
Laptop computer	69%	68%	69%	77%	79%	73%	55%	64%	48%
Desktop computer	54%	59%	50%	48%	48%	54%	62%	58%	61%
Smartphone	53%	53%	52%	61%	83%	57%	37%	33%	11%
iPad or tablet	18%	20%	16%	18%	19%	27%	18%	6%	10%
iPod touch	6%	6%	7%	26%	4%	6%	3%	1%	0%
Other	2%	3%	0%	1%	2%	4%	1%	0%	0%

Base: Users of social media (606)

Q: What devices do you use to access social network sites?

69%

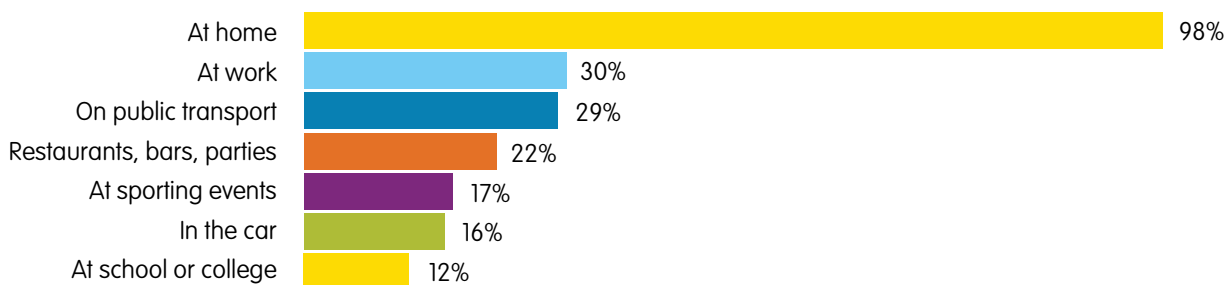
Percentage of social media users who access social media on a laptop



Where are social networking sites used?

Most (98%) access sites at home, most often in the living room, and frequently in the study and bedroom. Males were twice as likely to report accessing social media in the toilet (6% for males, compared to 3% for females). Some 30% of users access sites at work, up from 22% in 2011, and 12% at school or college. Quite a high proportion access sites while they are on the go at restaurants, bars, parties, on public transport, in the car or at sporting events.

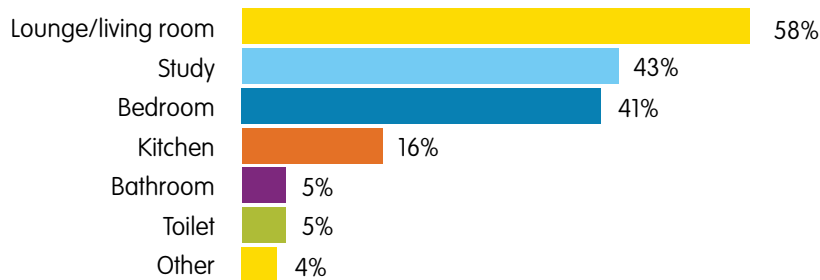
Locations where sites are used



Base: All social media users (606)

Q: Where do you use social networking sites – either on your computer or mobile device?

Where in the home sites are used



Base: Users of social media sites at home (590)

Q: Where would you normally use these sites at home? In which rooms of the house?

5%

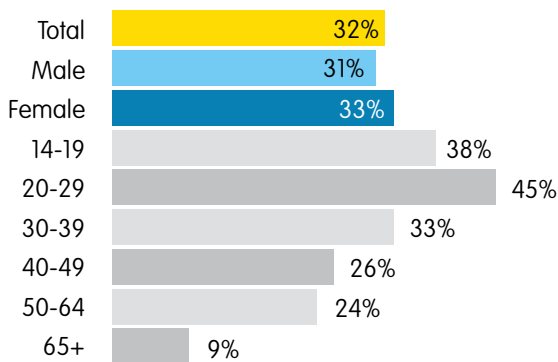
Percentage of social media users who access social media on the toilet

”

TV and social networking sites

Almost one in three social media users reported using social media while watching television. Social networking while watching television was similar across genders, but showed a strong age profile, peaking for those in their 20s. News and current affairs was most popular for social networking, however 14% social networked while watching television regardless of what was showing. One-third of those that used social media while watching television reported discussing the programs on social media while they were on, and very few reported that it decreased their enjoyment of the program, with most saying that it either had no impact or increased their enjoyment.

Use social media while watching TV

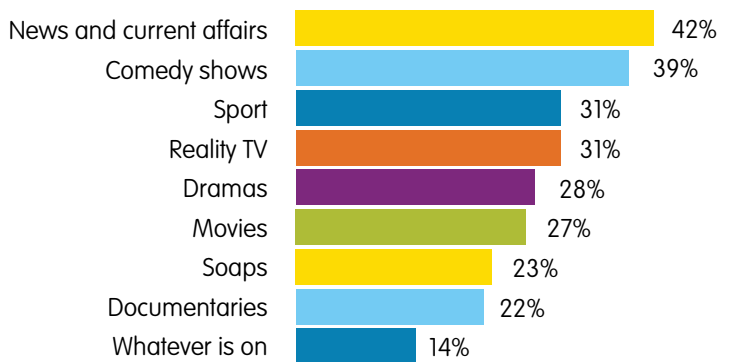


Base: All social media users (606)

Q: Where do you use social networking sites – either on your computer or mobile device?

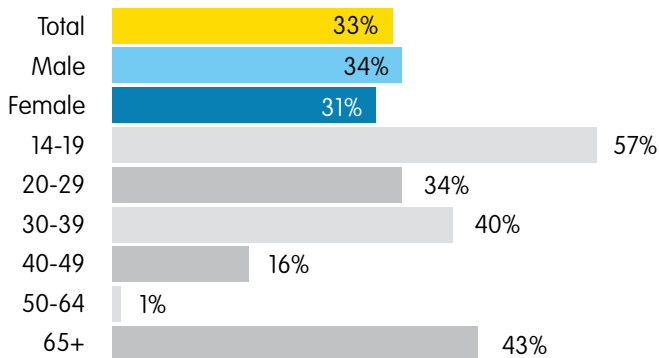
Q: Which types of shows do you mainly use social media whilst watching?

TV genres favoured while social networking



Base: Users of social media while watching TV (195)

Discuss TV program on social media while watching it

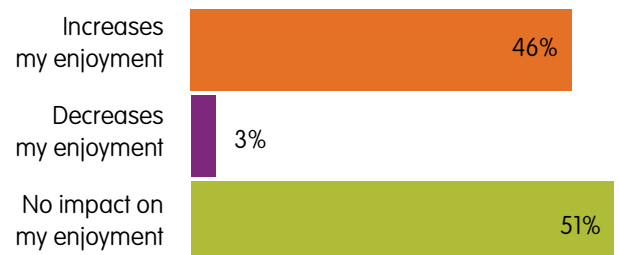


Base: Users of social media while watching TV (195)

Q: Do you discuss TV on social media during the program?

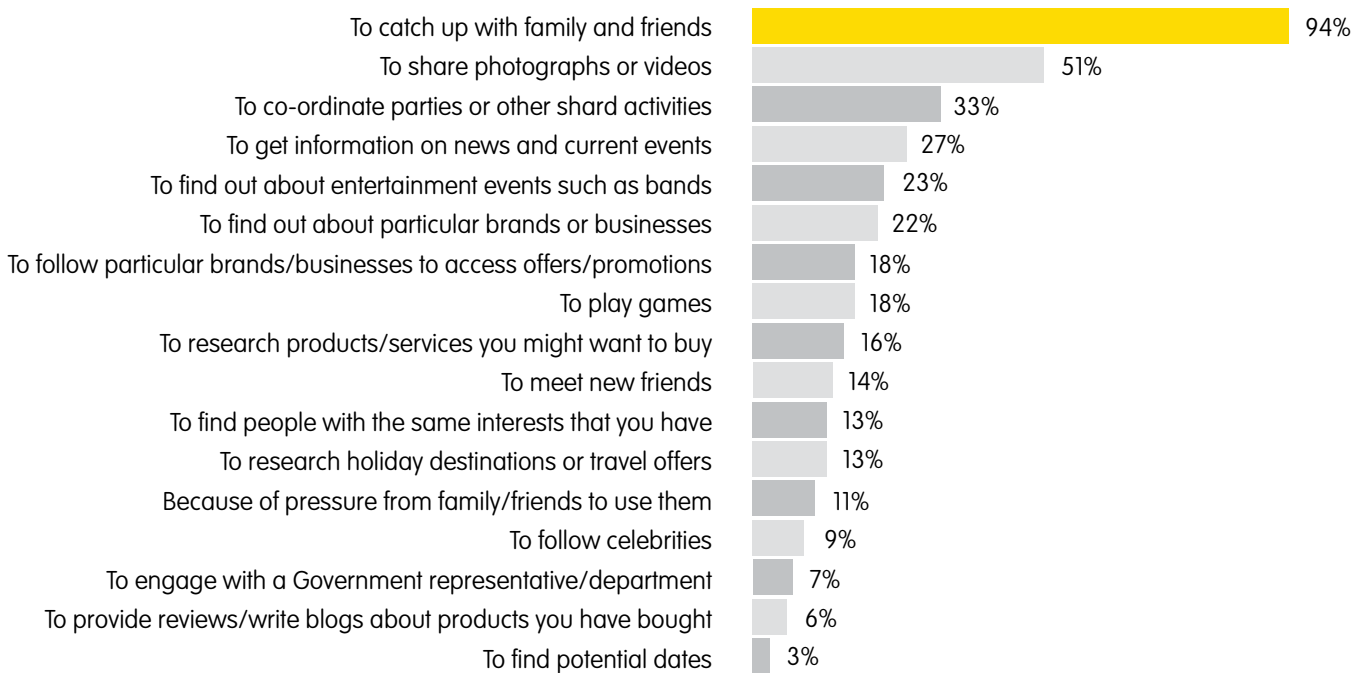
Q: Does discussing a TV program on social media during the program change your enjoyment of the program?

Social media impact on television enjoyment



Reasons for using social networking sites

The most common reason nominated for using social networking sites is 'catching up with friends or family'. Photo or video sharing is the second highest use, while a high proportion also uses social media to coordinate shared activities and find out about entertainment events. Other common usages include game playing and meeting new friends. Using social media to follow brands and businesses to access offers and promotions was the top commercial reason.



Base: Users of social media (606)

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?

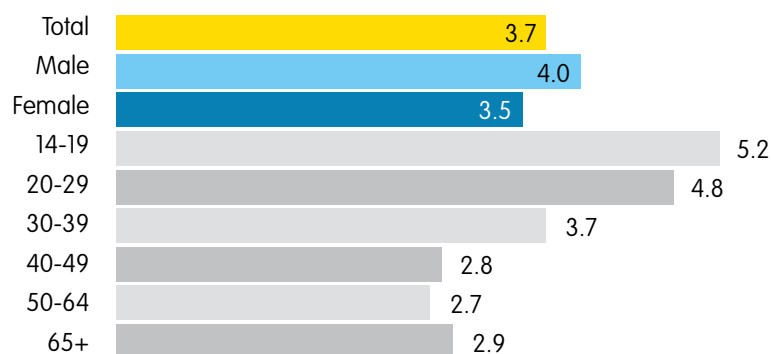
51%

of social media users access social networking sites to share photographs and videos



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 – with males more likely to nominate getting information on news and current affairs. On average, males nominate 4.0 different reasons for using social networking sites compared with just 3.5 for females. The younger age groups also use them for a larger variety of reasons. For example, we note that the 14-19 year olds are almost twice as likely as average to find out about entertainment. 14-19 year olds also have a much stronger than average tendency to use sites to co-ordinate activities, find out about entertainment, and meet new friends.

Average number of usage reasons



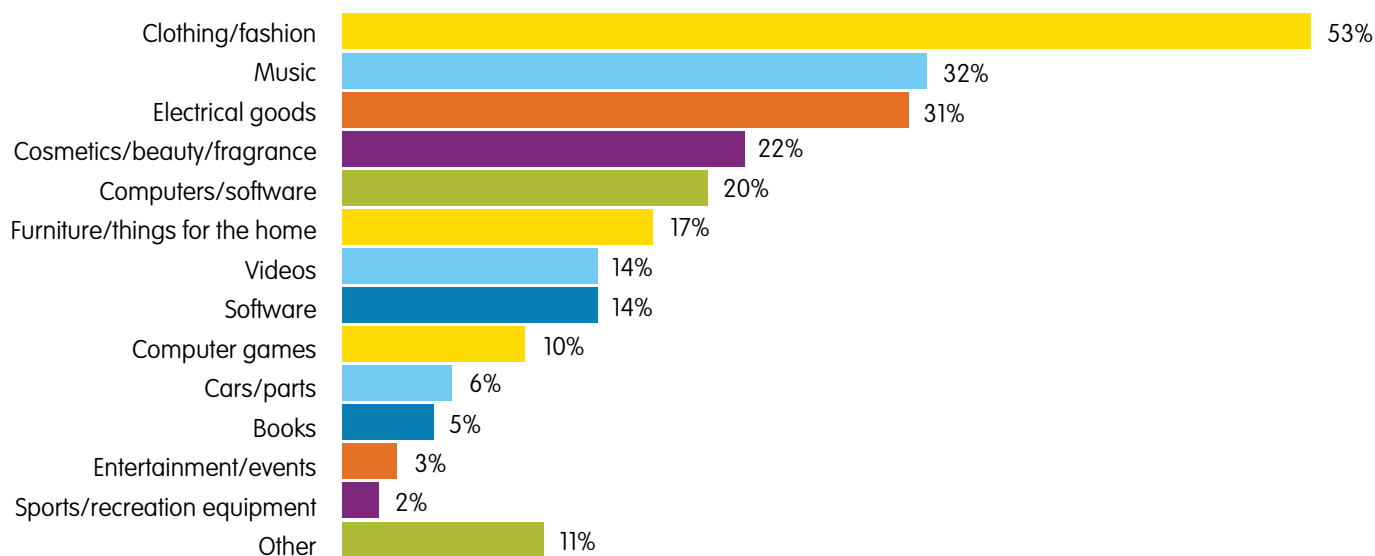
Base: Users of social media (606)
Q: For what reasons do you use social networking sites? Remember, we are talking about sites such as Facebook or Twitter and not the Internet in general. For which of these reasons do you use these types of sites?

	Total	Male	Female	14-19	20-29	30-39	40-49	50-64	65+
To catch up with friends and family	94%	90%	97%	97%	96%	99%	87%	91%	92%
To share photographs or videos	51%	50%	52%	60%	63%	59%	36%	33%	44%
To co-ordinate parties or other shared activities	33%	37%	30%	65%	54%	30%	21%	6%	10%
To get information on news and current events	27%	33%	23%	37%	34%	28%	20%	20%	18%
To find out about entertainment events such as bands, shows or the cinema	23%	27%	19%	43%	37%	22%	7%	9%	8%
To follow or find out about particular brands or businesses in general	22%	24%	21%	32%	30%	18%	19%	16%	13%
To follow particular brands or business to access special offers and promotions	18%	16%	19%	28%	25%	18%	11%	9%	8%
To play games	18%	17%	19%	23%	26%	14%	17%	14%	13%
To research other products or services you might want to buy	16%	18%	15%	14%	25%	13%	9%	14%	20%
To meet new friends	14%	19%	11%	37%	25%	8%	4%	4%	0%
To find people with the same interests that you have	13%	16%	9%	22%	16%	9%	7%	9%	14%
To research holiday destinations or travel offers	13%	14%	11%	4%	16%	14%	13%	15%	10%
Because of pressure fro family/friends to use them.	11%	11%	11%	15%	10%	5%	14%	11%	18%
To follow celebrities	9%	11%	8%	27%	10%	11%	1%	2%	0%
To engage with a Government representative or department	7%	9%	5%	7%	5%	9%	6%	6%	9%
To provide reviews or write blogs about products or services you have bought	6%	8%	4%	5%	7%	9%	5%	4%	4%
To find potential dates	3%	5%	2%	4%	4%	2%	2%	3%	9%

Types of products or services researched on social networking sites

The 16% who use social networking sites for researching products or services were asked which particular items they were looking for. Fashion and music top the list, followed by electrical goods, cosmetics and fragrance and furniture and things for the home.

Products or services researched on social networking sites



Base: Users of social media (606)

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

53%

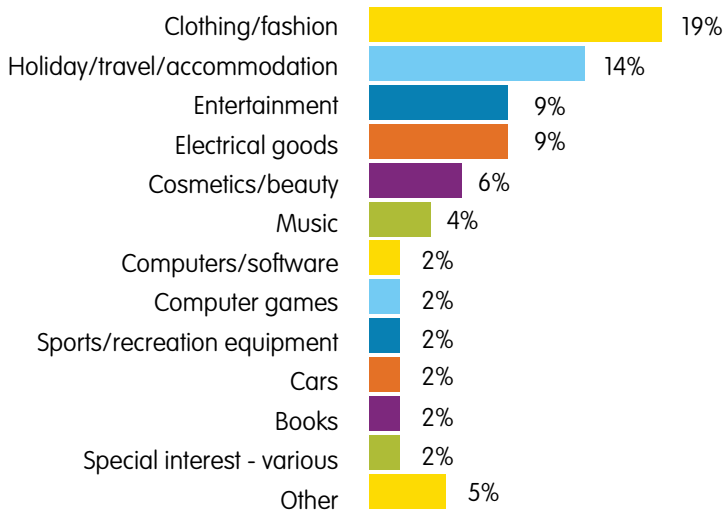
of social media users access social networking sites to research clothing or fashion



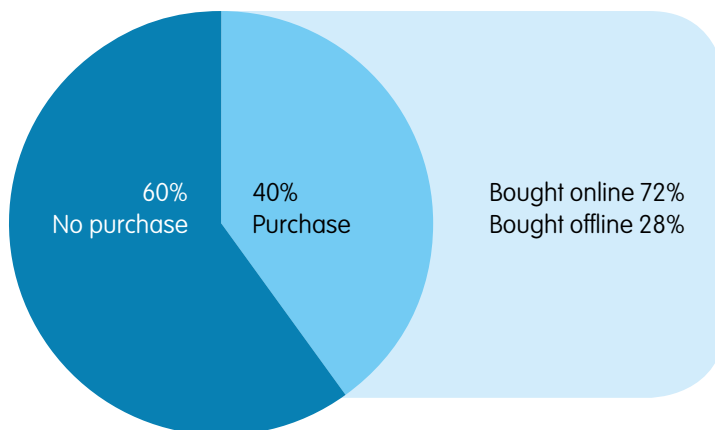
Last search occasion

The research also looked at the last search occasion and found that clothing, travel and entertainment were the most commonly searched items on social networking sites. Some 62% of searches were solely conducted on a computer and 18% solely on a mobile device. Some 8% searched using both of these options. Overall some 40% of searches resulted in a purchase, 72% of which were made online.

What was looked for?



How was the research conducted?



Base: Ever research travel/entertainment/products/services on social networking sites (203)

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?

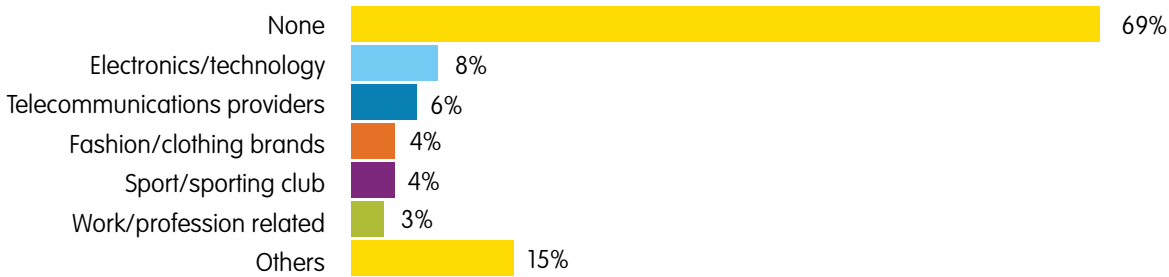
Q: Did you do that research on a computer or a mobile device?

Q: Did that research lead to a purchase? Was that purchase made online

Brands or businesses followed on Twitter

Among the Twitter users in the sample, 31% follow brands or businesses on Twitter. The most commonly followed categories are electronics, technology and telecommunications providers.

Types of brands/businesses followed on Twitter



Base: Use Twitter (75)

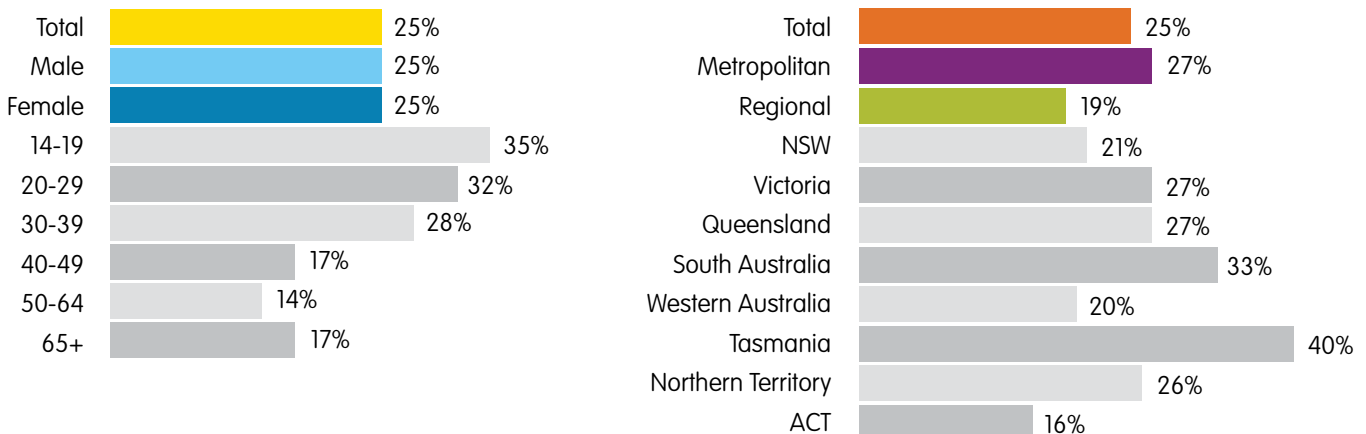
Q: Do you follow any particular brand or businesses in Twitter?

Q: What type of brands or businesses do you like to follow?

Social networking groups associated with businesses or brands

1 in 4 social networking site users follow social networking groups associated with businesses or brands. Females are just as likely as males to follow a social networking group associated with a brand and 14-19 year olds are the most avid followers in this category. Tasmanians are more likely than average to use these networks.

Proportion that follow social networking groups associated with businesses or brands



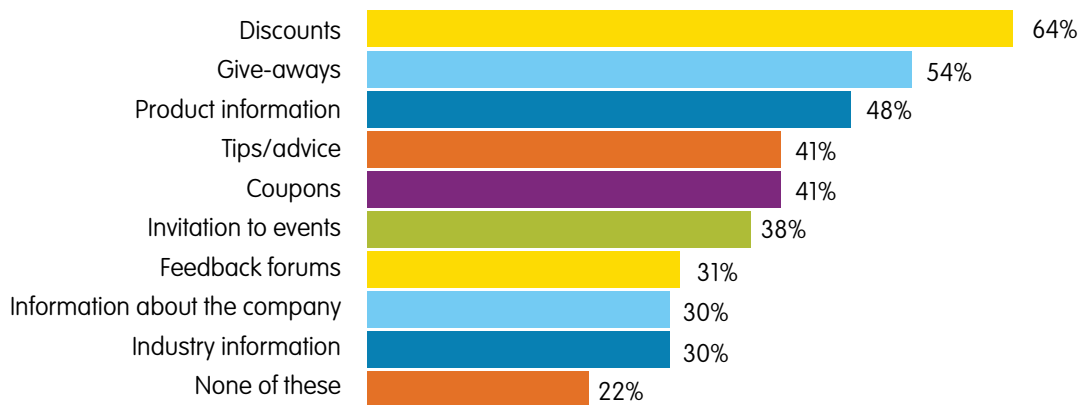
Base: All social networking users (606)

Q: Do you follow any social networking group associated with any particular business or brand?

What do consumers want from businesses or brands followed?

Discounts are the most commonly sought after items required from businesses or brands followed on social networking sites. Giveaways, product information, tips/advice and coupons are also sought by a sizeable proportion of followers.

What do consumers want from businesses or brands followed?



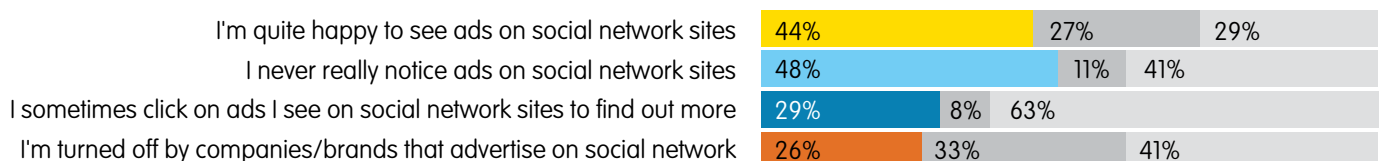
Base: Users of social media (606)

Q: Which of these things would you like to get from businesses or brands you might follow on social media?

Advertising on social networking sites

While more are likely to agree than disagree that they are happy to see advertising on social networking sites, a clear majority claim to take no notice of ads they see and almost half say they never really notice them. Some 29% sometimes click on ads to find out more, but over a quarter say that they are turned off by companies or brands that try to reach them through advertising on social networking sites.

Attitudes towards advertising on social network sites



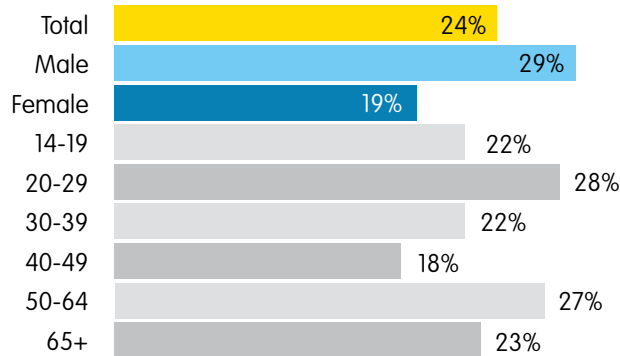
Base: Users of social networking sites (606)

Q: How do you feel about businesses or brands advertising on social networking sites. Do you agree or disagree (or have no opinion either way) with the following statements?

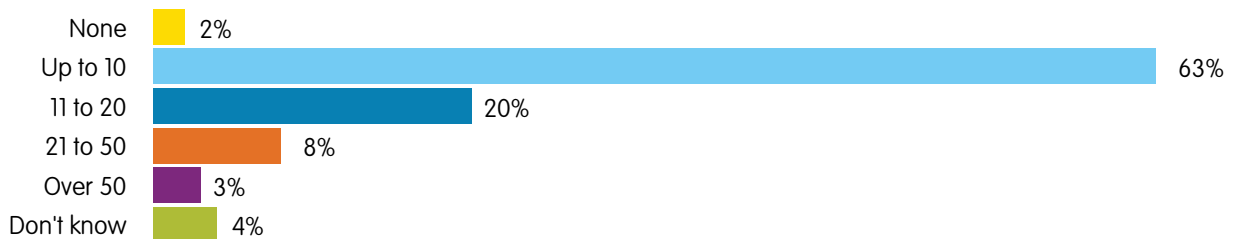
Provision of online ratings

24% of Internet users have provided/provide online ratings. On average, those who do provide ratings provided 13 ratings in the previous year. Accommodation, restaurants/bars, stores and mobile apps were most commonly rated.

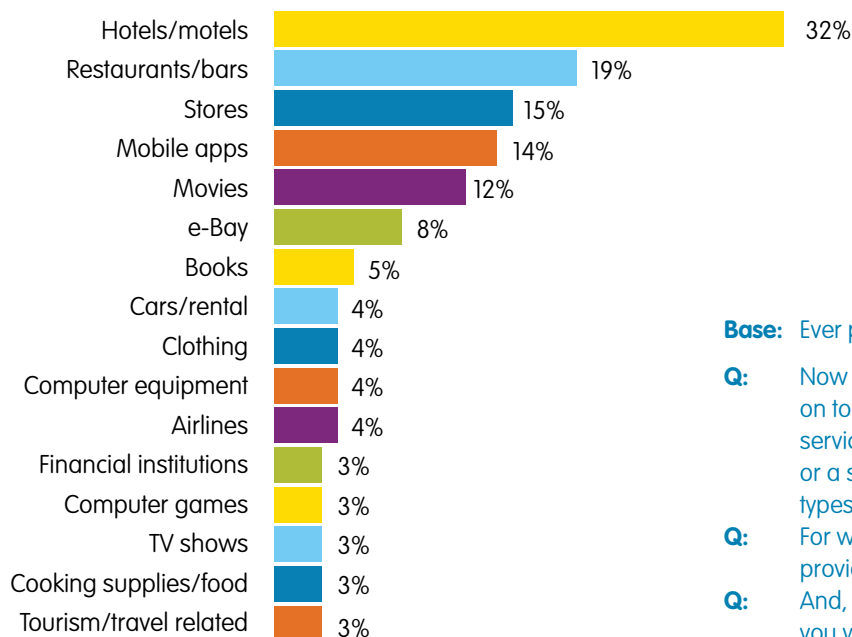
Proportion who ever provide ratings online



Number of ratings provided last year



Products or services rated



Base: Ever provide online ratings (221)

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?

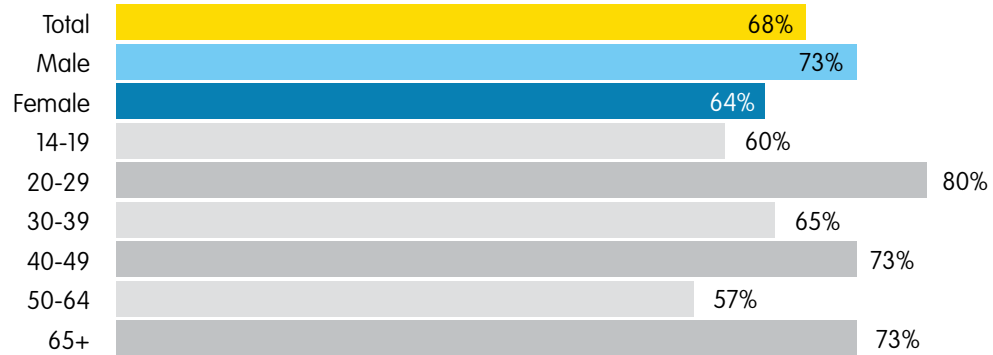
Q: For what types of products or services have you provided online ratings?

Q: And, in the last year, how many times do you think you would have provided an online rating?

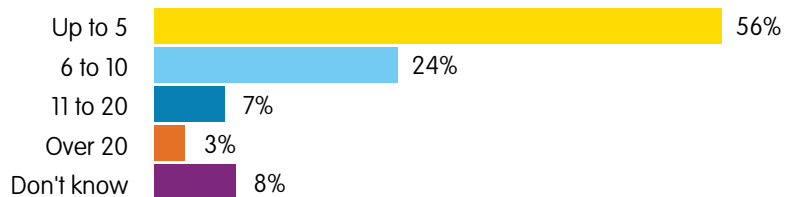
Use of online reviews or blogs

68% of all Internet users have read/do read online reviews or blogs – with 20-29 year olds the most likely to do so. On average, people would expect to read 5 reviews before making a purchase decision.

Proportion who have ever read online reviews or blogs



Number of reviews/blogs expected to read



Average = 4.8

Base: All social media users (606)

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?

68%

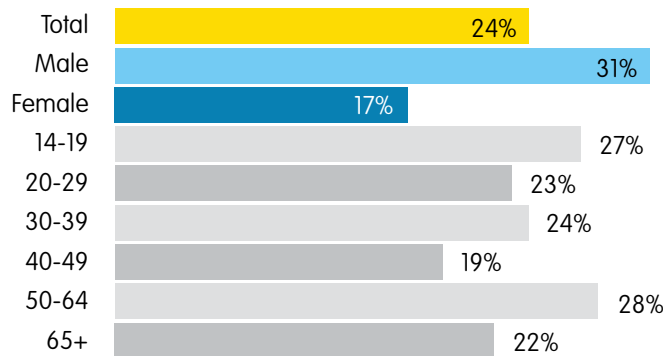
Proportion of social media users who have read online reviews or blogs



Posting of online reviews or blogs

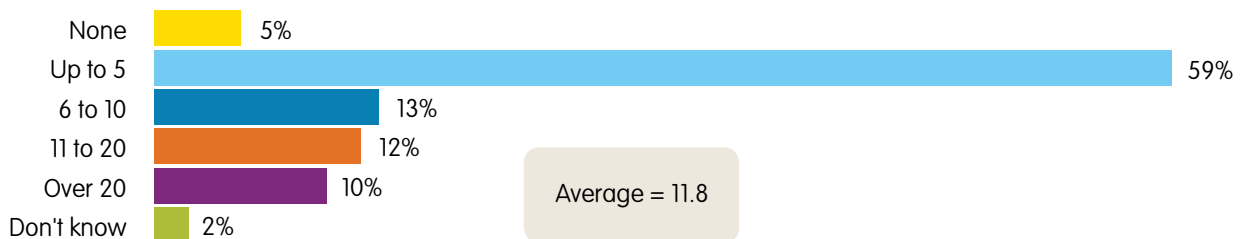
In contrast to the 68% who read reviews, only 24% ever post reviews or blogs on the Internet. Among those who do provide reviews, the average number provided in the last year was almost 12. Reviews of hotels/motels, restaurants/bars and movies were most commonly reviewed.

Proportion who ever post online reviews or blogs



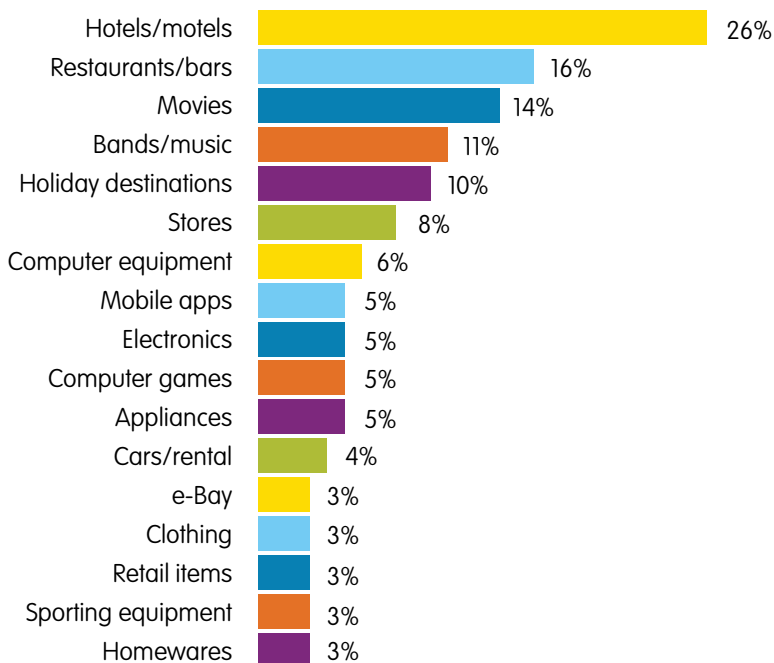
Base: All social media users (606)

Number of reviews provided last year



Base: Ever provide online reviews (196)

Products or services reviewed



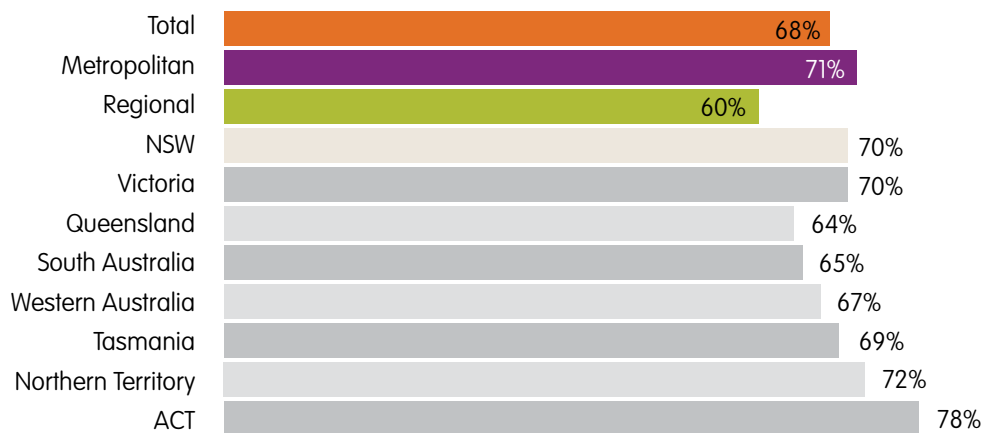
Base: Ever provide online reviews (196)

- Q:** Have you ever posted an online review or blog, where you provide your thoughts or opinions on products, services, entertainment and so forth?
- Q:** For what types of products or services have you provided online reviews or blogs?
- Q:** And, in the last year, how many times do you think you would have posted an online review or blog?

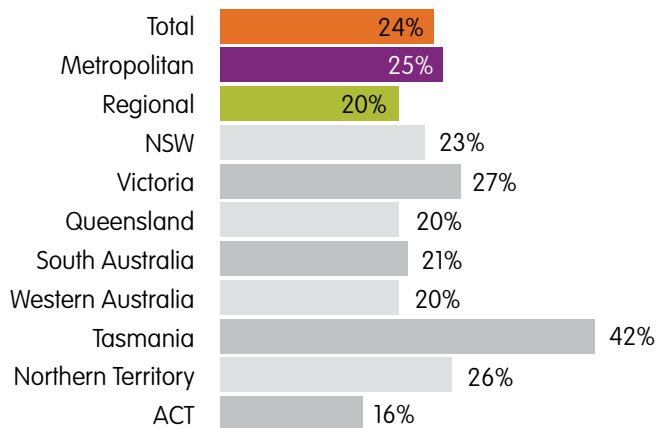
Use and posting of online reviews or blogs by location

The proportion who read online reviews varies little by location, although those in Tasmania appear to be more likely to post online reviews. Both reading and posting online reviews were significantly higher in metropolitan areas, compared to regional locations. Over half of consumers would not consider changing their opinion if a business responded to a negative review or blog that they had posted.

Ever read online review or blog



Ever post online review or blog

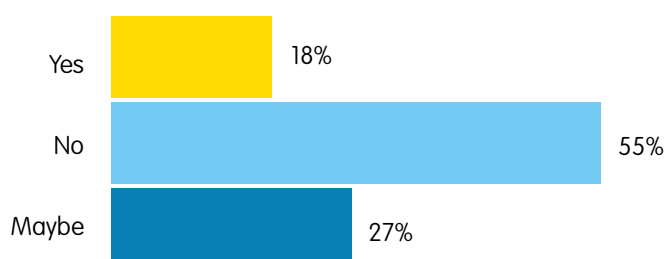


Base: All social media users (606)

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: Have you ever posted an online review or blog, where you provide your thoughts or opinions on products, services, entertainment and so forth?

Might change opinion if business responds to feedback on social media



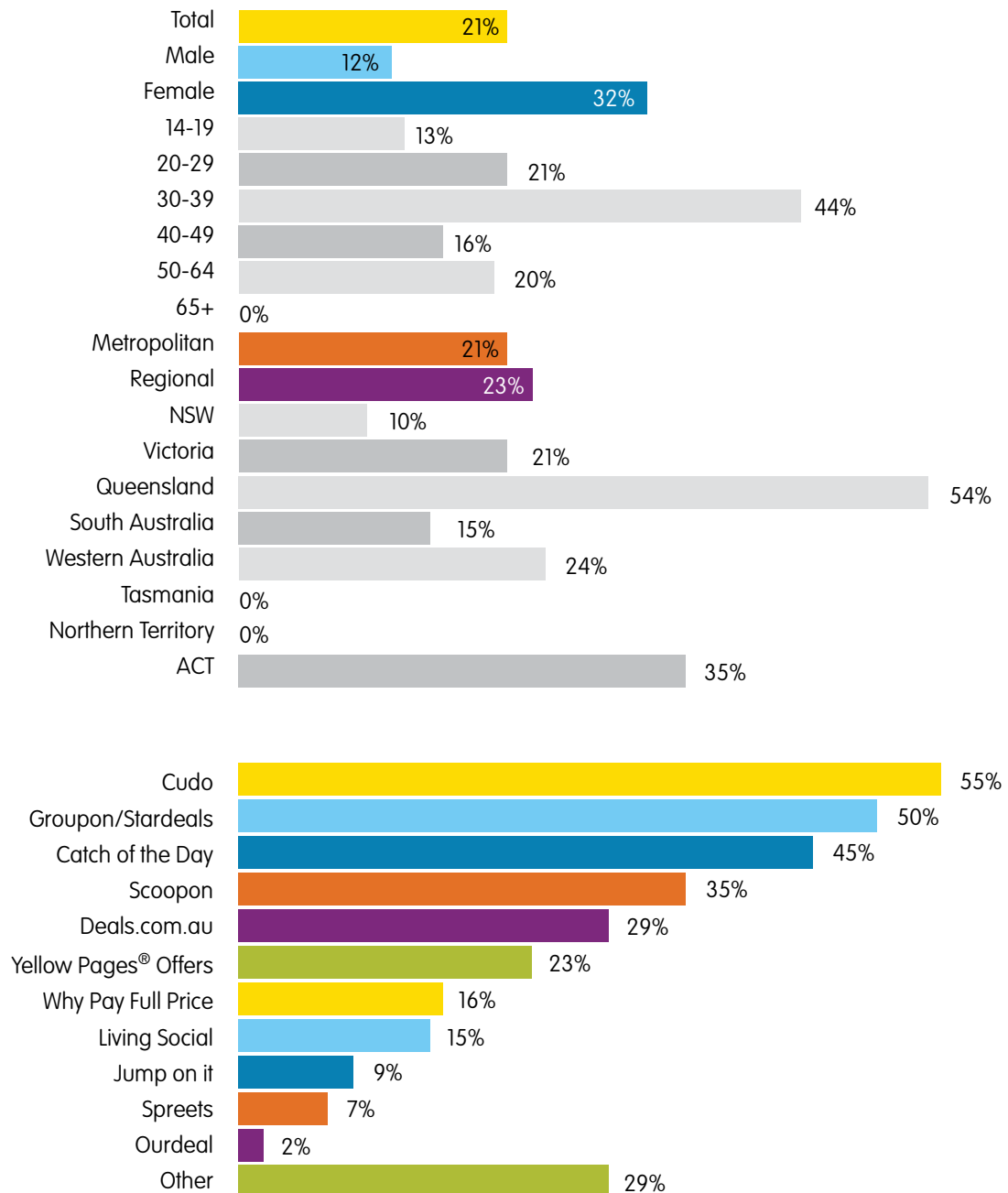
Base: All social media users (606)

Q: If a business gets back to you after you have posted a bad review, would that change your opinion?

Group buying sites usage

Overall, 21% of social media users access group buying sites, with the 30-39 year olds most likely to do so. Usage is relatively low in Tasmania and the Northern Territory. Cudo is the most commonly accessed site followed by Groupon, Catch of the Day and Scoopon.

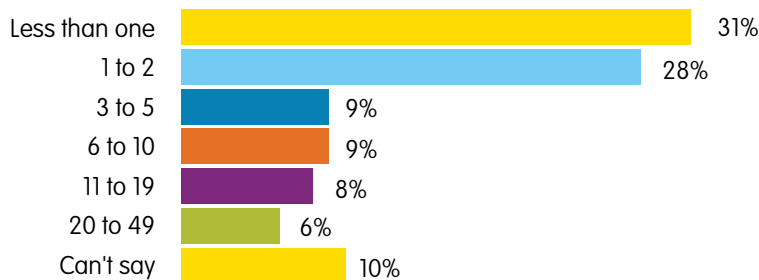
Proportion who use sites



Frequency of use and time spent on group buying sites

Those who access group buying sites do so, on average, about 5 times a week, although well over half restrict their visits to less than 3 times a week. On average, those who access group buying sites spend around 6 minutes per visit.

Number of times used per week



Average times per week = 5.1

Time spent per usage occasion (mins)



Average time spent per occasion = 6.3 minutes

Base: Use group buying sites (16)

Q: In a typical week, how many times would you use a group buying site?

Q: And, roughly, how long would you spend each time you use a group buying site?

Section 2

Australian businesses and social media

#

34%

Percentage of medium sized businesses with a social media presence

72%

Percentage of small businesses with a social media presence, that believe investment in social media contributes to increased sales.

\$100,480

Average yearly expenditure on social media made by large businesses with a social media presence.

22%

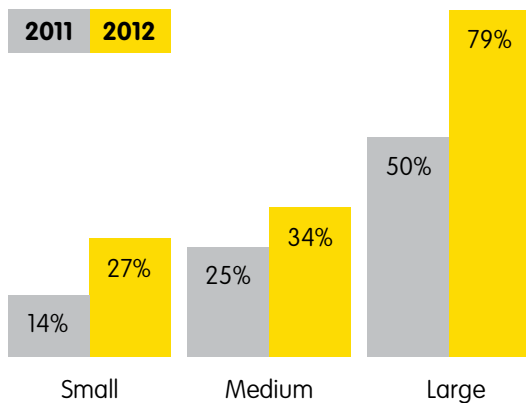
Percentage of small businesses with a social media presence, that update their social media daily.

@

Use of social media - summary

Some 27% of small businesses, 34% of medium businesses and 79% of large businesses currently claim to have a social media presence, with the prevalence of social media in businesses having increased steadily in the past year. Facebook continues to dominate in all three categories with Twitter and LinkedIn also playing important parts across business size. Google+, Youtube and blogs are also used by a sizeable minority of businesses, particularly for large businesses.

Proportion that have social media presence



	Small	Medium	Large
Facebook page	83%	79%	82%
Twitter	27%	33%	71%
LinkedIn	20%	20%	30%
Google+	8%	5%	11%
Youtube	4%	5%	29%
Blog	4%	6%	13%

Base: Total sample (1524) / (276) / (151)

Base: Have social media presence (430) / (92) / (119)

- 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?
- Q:** What does your social media presence include?

79%

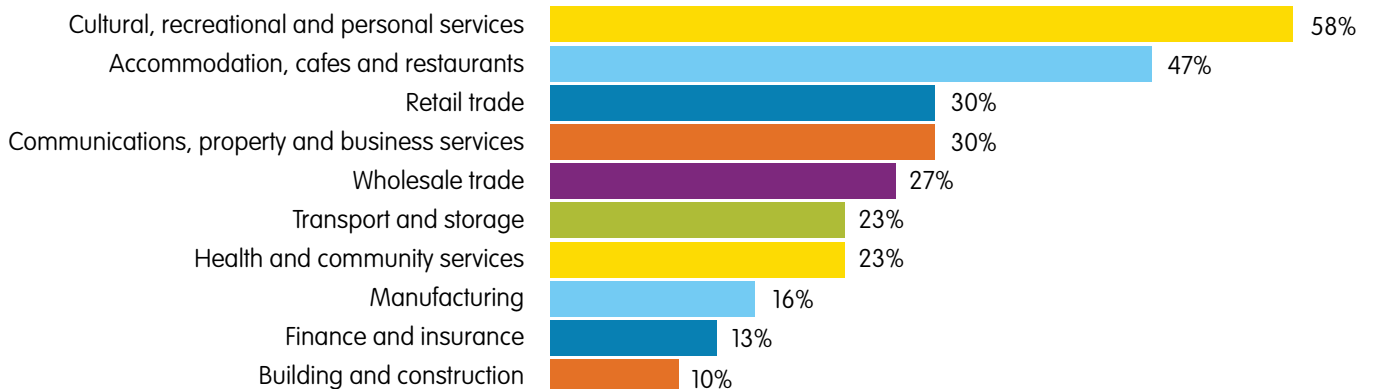
of medium sized businesses with a social media presence have a Facebook page



Use of social media by business category (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.

Proportion that have social media presence



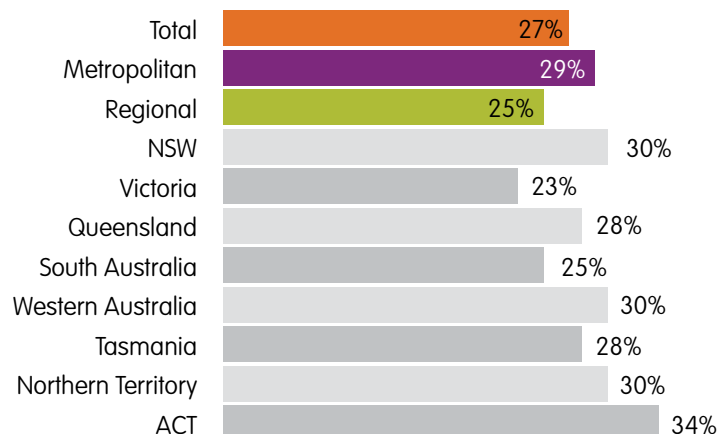
Base: Total sample (1800)

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?

Use of social media by location (small/medium)

Social media usage by businesses peaks in the ACT, with strong results also for New South Wales, Western Australia and the Northern Territory.

Proportion that have social media presence



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?

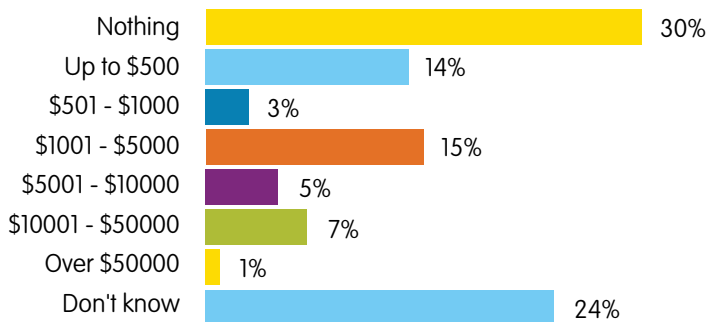
Business investment in social media

Overall, 70% of small businesses involved with social media have made some financial investment in it, up from 65% in 2011. While many are not sure what the investment is, most of those who do answer report an average of \$3,410, up from \$2,050 in 2011.

A larger 95% of medium business social media users have invested in social media although, again, almost four in ten are unable to nominate an amount. Most of those who do give an answer report an average of \$16,920, up from \$6,500 in 2011.

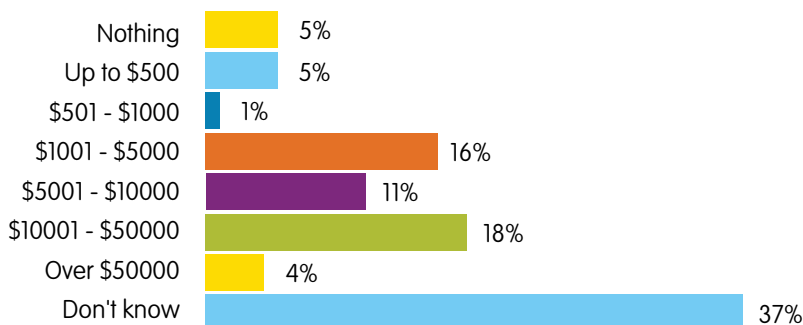
And 94% of large business social media users have invested financially, but a very high 54% can't nominate the amount. The average nominated expenditure in social media from those businesses that did know was \$100,480, up from \$78,750 in 2011.

Small



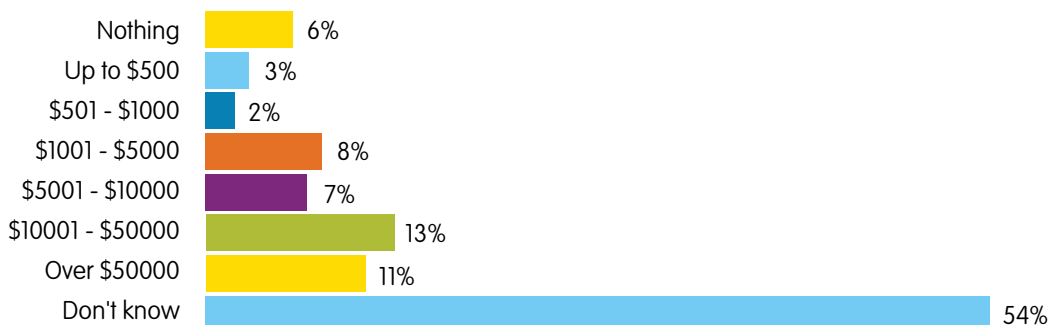
Average = \$3,410

Medium



Average = \$16,920

Large



Average = \$100,480

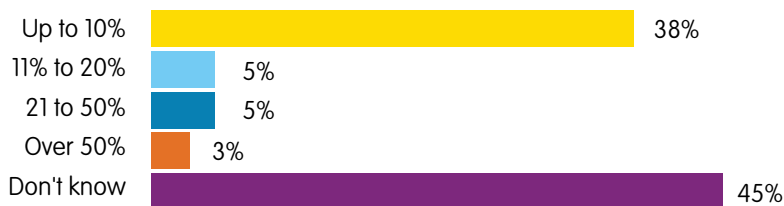
Base: Have a social media presence (430) / (92) / (119)

Q Approximately, what is your current investment in social media? What do you spend a year?

Percentage of marketing budget allocated to social media

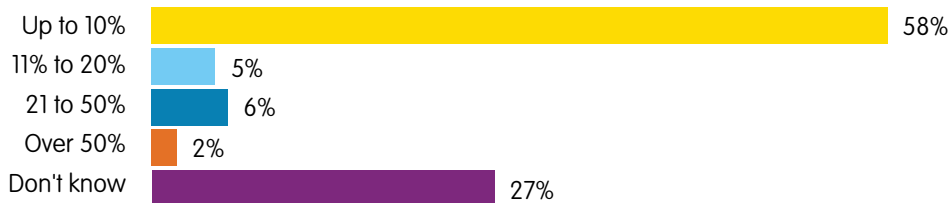
Social media represents an increasing proportion of marketing budgets for businesses, particularly for small businesses. While total budgets have increased significantly over the past year, so too has the proportion of the marketing budget, except for large businesses where there was a small decrease. On average, small businesses who use social media allocate just over 15% of their budget to social media, while medium businesses allocate just over 9% and large businesses just under 5%.

Small



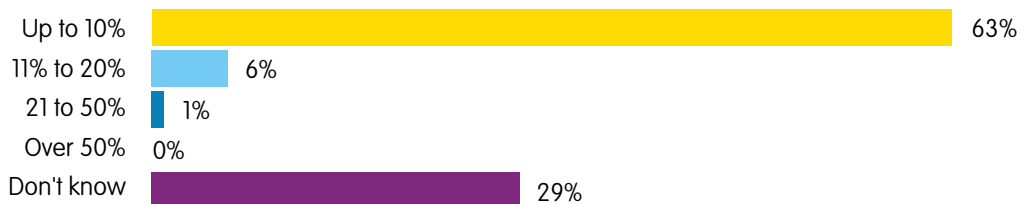
Average = 15.3

Medium



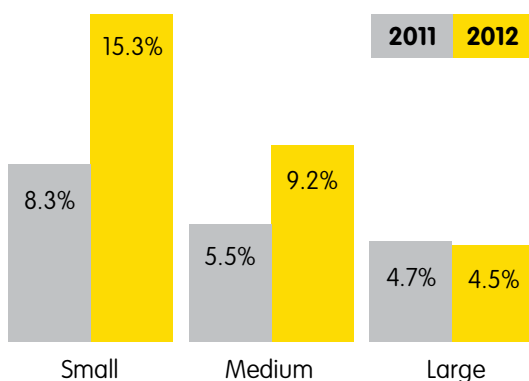
Average = 9.2

Large



Average = 4.5

Proportion of marketing budget allocated to social media - trends

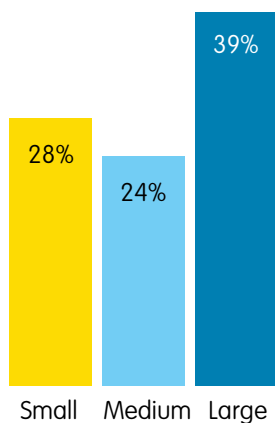


Base: Have a social media presence (430) / (92) / (119)
Q Approximately what percentage of your marketing budget is allocated to social media?

How business measure success of their social media investment

Just over one in four SMEs and 39% of large businesses formally measure the return on their social media investment. Those that do measure return on investment are most likely to do this by monitoring the number of responses on social media. Whilst the majority of businesses do not measure the ROI of their social media, most have an idea on whether or not it has been successful, which is most commonly measured by the number of likes/followers or subscribers to their social media channels.

Businesses that measure return on investment for social media



How businesses measure social media ROI

	Small	Medium	Large
Monitoring number of responses on social media	36%	37%	54%
Asking customers how they found you	30%	38%	11%
Third party statistics provider	26%	19%	28%
Volume of sales/customers/revenue/new sales	5%	6%	9%
Specific deals for social media customers	0%	12%	0%
In-house statistics	0%	0%	11%
Saving a customer	0%	0%	2%

Base: Have a social media presence (430) / (92) / (119)

Base: Measures social media ROI (86) / (17) / (46)

Q: Do you measure your return on investment into social media?

Q: How do you measure the return on investment into social media...?

How businesses measure social media success

	Small	Medium	Large
Number of likes/followers/subscribers	35%	41%	67%
Sales/revenue/profits	24%	32%	15%
Ask people how they get information from us	14%	24%	-
Take up of incentives/offers	1%	1%	2%
Through positive social media conversation	-	-	17%
Usage	-	-	11%
Brand sentiment	-	-	7%
Number of hits on our website	-	-	7%
Analytical tool	-	-	4%
Don't know	21%	1%	9%

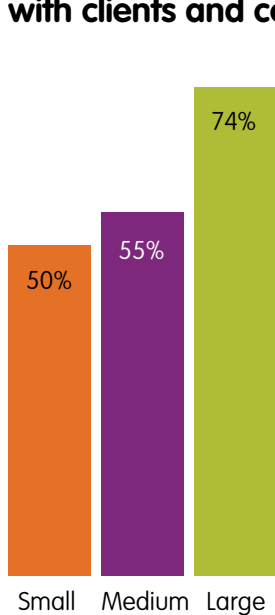
Base: Have a social media presence (430) / (92) / (119)

Q: How do you measure the success of your social media?

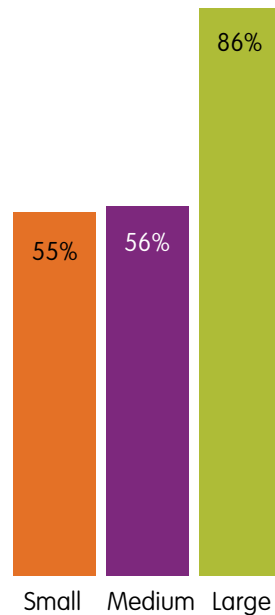
Uses of social media

The most common use of social media across all three business categories is to invite online comments, ratings or reviews. Not far behind, use for two-way communication with clients or contacts is the next most common usage category ahead of providing incentives via social media. Some 34% of small, 27% of medium, and 35% of large businesses who engage in social media offer incentives. Most commonly these are discounts, giveaways or coupons.

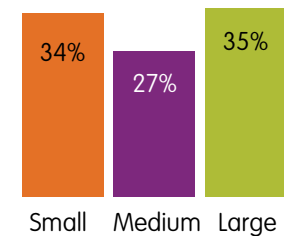
Use social media for two-way communication with clients and contacts



Invite online comments, ratings or reviews on social media sites



Offer incentives to consumers via social media



Types of incentives provided

Base: Offer incentives	Small	Medium	Large
Discounts	73%	58%	29%
Give-aways	21%	40%	48%
Service	2%	7%	0%
Competitions	1%	0%	55%
Invitations to events	1%	0%	10%
Coupons	0%	0%	5%

Base: Have a social media presence (430) / (92) / (119)

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?

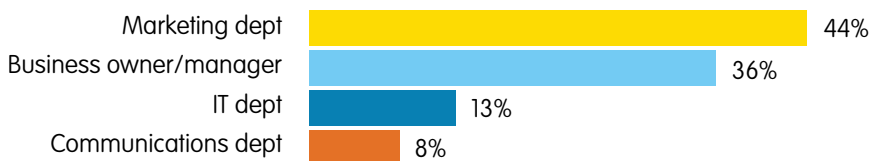
Who is responsible for a business' social media presence?

In small businesses, the owner or manager is almost invariably responsible for the social media presence. In medium and large businesses, this responsibility sits more often with the marketing department. Small businesses outsource social media to a small extent, usually to a web or internet agency, however medium and larger businesses are more likely to use internal resources and structures to manage their social media.

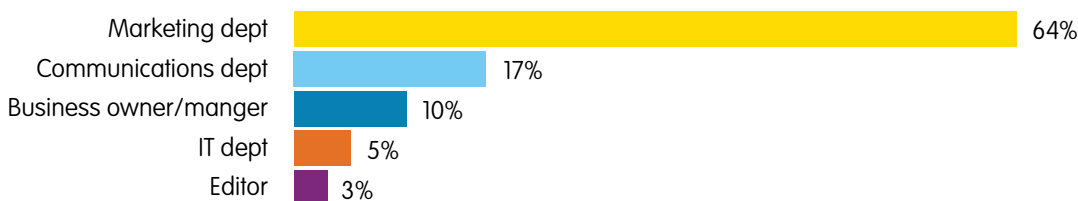
Small



Medium



Large



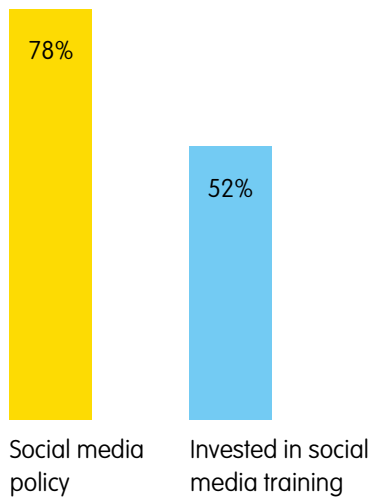
Base: Have a social media presence (430) / (92) / (119)

Q Which department has overall responsibility for your social media presence?

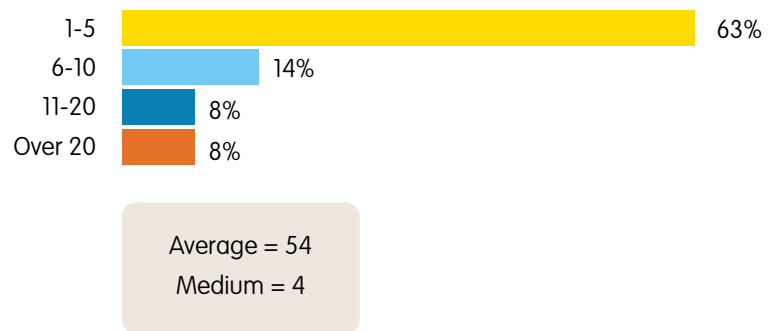
Social media management in large businesses

Many larger businesses have put in place structures and policies for social media. Almost four in five large businesses have a policy on what is or is not appropriate for staff to do on social media, and over half have invested in specific social media training. The average number of social media employees employed by large businesses is 54, however this is swayed by a few very large businesses with large numbers of social media employees. The median number of employees for large businesses is four. Only just over half of businesses thought that they had the right social media skills sets in their organisation.

Social media in large businesses



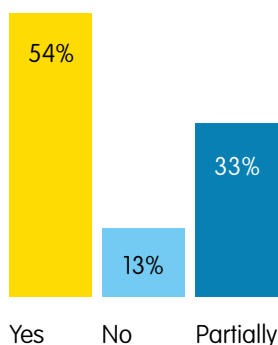
Social media in large businesses



Base: Have a social media presence (119)

- 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?

Does your business have the right social media skill sets



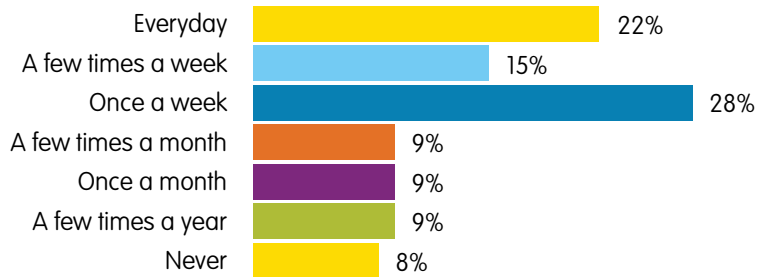
Base: Have a social media presence (119)

- Q:** Do you have the right social media skills sets in your organisation?

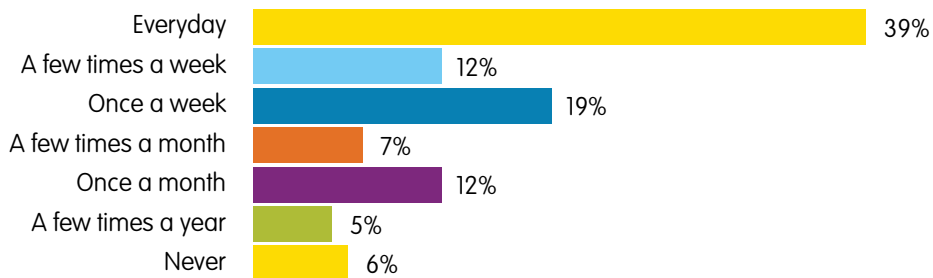
How often do businesses update their social media?

Large businesses were much more likely to update their social media at least on a daily basis, with small businesses more likely to update their social media on a weekly basis.

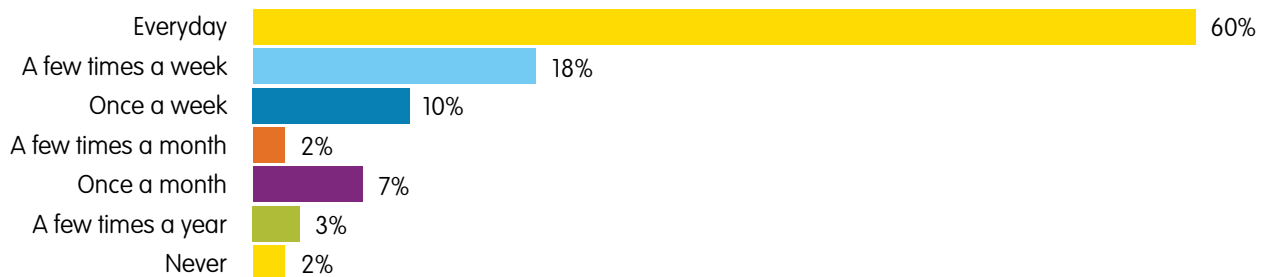
Small



Medium



Large



Base: Have a social media presence (430) / (92) / (119)

Q How often do you monitor or update your social media presence?

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

Three-quarters of small business have some form of strategy to drive people to social media sites – most often a link on their website. Almost four in five medium businesses have a strategy and, again, website links play the most significant part. For large businesses, 96% have a strategy to drive traffic to their social media site, with website links used by around one-half.

Means of driving traffic to social media presence

	Small	Medium	Large
None – no strategy to drive traffic	25%	21%	4%
Have links on our website to our social media site	23%	19%	50%
Advertise on other websites/Facebook	10%	3%	25%
Word of mouth/networking	7%	4%	2%
Advertise our online presence in traditional media	6%	18%	19%
Like/follow/subscribe to other's social media sites	3%	0%	14%
Social media links on our business cards/signatures	4%	2%	11%

Base: Have social media presence (430) / (92) / (119)

Q: How do you drive traffic to your social media presence

25%

of small businesses with a social media presence have no strategy to drive traffic to their social media activities



Expectations for the next 12 months

There is a clear indication that those who currently have a social media presence are likely to increase their expenditure on this in the year to come, with a net 21% of small, 35% of medium, and 57% of large businesses expecting an increase. For those large businesses planning to increase their social media expenditure, some 38% are planning to spend less on print advertising, however almost three in ten are not planning to reduce budgets in other areas as a consequence.

Most expect that social media investment will contribute to an increase in sales over the next 12 months – with the average expectation for increase being approximately 16% for SMEs and 8% for larger businesses.

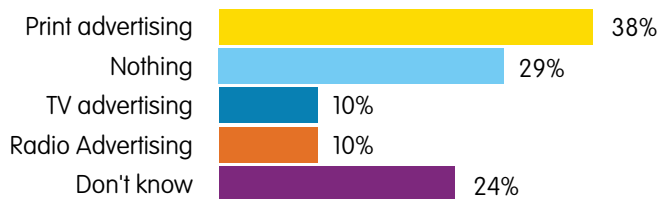
Expectations for social media expenditure

	Small	Medium	Large
Spend more	30%	38%	59%
Spend the same	58%	48%	28%
Spend less	9%	3%	2%
Don't know	3%	11%	11%

Base: Have social media presence (430) / (92) / (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?

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



Base: Large businesses planning to increase social media expenditure (21)

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?

	Small	Medium	Large
Yes	72%	67%	61%
No	28%	33%	39%
Average expected increase	16.6%	5.8%	8.4%
Don't know	3%	11%	11%

Base: Have social media presence (430) / (92) / (119)

Q: Do you believe that your social media investment will contribute to an increase in sales in the next 12 months?

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