Magid Social Media Study 2014:
The Year Smartphones Took Over

How Social Network Use On Smartphones Is Changing Everything From Connected Commerce To Social TV – And How Brands And Media Companies Can Leverage This Shift

Social network use looks to be peaking, but the way people are engaging with social networks is still changing rapidly. Smartphones are now the primary device used to access most major social networks, fundamentally altering the social media status quo.

Magid's Social Media Study analyzes a variety of user attitudes and behaviors to help marketers understand the scale of different social media opportunities, differentiate critical trends vs. overstated fads, and understand what the future holds in order to prioritize and maximize social media investments and results. The study's granularity provides in-depth insights based on various social media goals, target markets, content/product focus, and industry.

The study specifically explores:

SOCIAL MEDIA'S PEAKING GROWTH, SHIFTING ENGAGEMENT

Social network growth looks to be peaking, as the vast majority of the US Internet population now uses social networks. But the nature of that use is changing rapidly and saw large shifts over the past year. Facebook and Twitter use is falling notably for the first time, as platforms like Instagram, Pinterest, Snapchat, and new messaging applications draw user interest across generations. The study analyzes these engagement shifts, along with the distinct users, value propositions, and attitudes toward each social network.

NETWORKS MOVING FROM SOCIAL PLATFORMS TO COMPLETE MOBILE ECOSYSTEMS

Most of the major social networks began as platforms to facilitate connections with friends, family, celebrities, and brands. Now they have become comprehensive mobile ecosystems, driven by increasing consumer adoption of social commerce, media content, and user-generated photos and videos. We dig into the behaviors propelling this new mobile ecosystem, and how marketers and content creators can capitalize on its opportunities for engagement and audience extension.

THE SMARTPHONE HAS BECOME THE SOCIAL NETWORK DEVICE

The past year saw enormous increases in social network time spend on smartphones. In fact, social networking is now primarily a smartphone activity on most of the major networks. The study details unique social network behaviors on smartphones and tablets, and outlines specific engagement opportunities by platform based on how consumers are using each social network on their different mobile devices.

SOCIAL MEDIA PROVIDES UNPARALLELED ADVERTISING OPPORTUNITIES

Most social network time spend is happening while users are watching TV, eating meals, listening to music, and other commercially-driven activities. Coupling that with the increasing frequency of clicking on both sponsored content and video advertisements, social networks provide marketers with a truly unique opportunity to engage consumers. The study explores how to best reach social media users, and looks at advertising awareness, effectiveness, and impacts across social networks.

SOCIAL NETWORKS BECOMING INCREASINGLY POWERFUL SHOPPING TOOLS

Social networks are already used to discover new merchandise, get product information, and connect with brands. But consumers continue to increase their use of social networks to engage throughout the entire shopping process, including posting about purchases and hunting for deals. We highlight where social networks and commerce intersect, the best opportunities for retailers, and the value that different social networks provide within the purchase cycle.

HUGE SOCIAL NETWORK BRAND ENGAGEMENT OPPORTUNITIES

Most people now like and follow brands on social networks, and media producers, retailers, and consumer goods companies are leading the pack. More importantly, our data shows that this brand engagement is driving strong web and physical traffic, and is changing consumption and purchase behaviors. Yet there is still opportunity for better brand building, especially around deal and coupon offerings. The study delves into who is engaging with different types of companies/brands, content preferences, and how this all differs by social network to maximize engagement efforts and results.

THE STRENGTH OF NEW MESSAGING APPS

Emerging messaging applications like Snapchat, Kik, WhatsApp, and WeChat are clearly filling a consumer need for new mechanisms of communication, drawing time spend from the most established social networks. These apps are valued for their simplicity, highlighting a consumer preference that could dictate future marketing opportunities. The study takes a look at use of the leading messaging apps, what's driving messaging app adoption, where the effects are being borne out, and future projections.

SOCIAL NETWORKS ARE MEANINGFULLY DRIVING TV VIEWING NOW

Facebook, Twitter, and Instagram have all become powerful drivers of TV show discovery and tune-in, extending content engagement beyond the set top box and creating new avenues for second-screen advertising opportunities. The study provides insight regarding the scale of the social TV opportunity, demographic trends, how engagement differs by TV show genre and specific network, how opportunities differ by social network/social TV app, and the impact of social networks on show discovery, engagement, and tune-in.

SOCIAL NETWORKS ARE BECOMING THE BREAKING NEWS SOURCES

More people now discover breaking news on Facebook than from either national TV news programs like Fox News or national news websites like CNN.com. Outside of breaking news, social networks also shine when it comes to entertainment news – but there is still ample opportunity for local and national media organizations to make headway in terms of distributing content through social networks. The study tracks news consumption across social networks and news genres to understand the unique news opportunities by site, and addresses engagement with different types of local and national news media and the impact of social network news consumption on the use of news organizations' digital properties.

STUDY DETAILS:

The Magid Social Media Study is an online quantitative study with 1,934 13-64 year-old social media users in the US, defined as those who use any major social networks, including Facebook, Twitter, Google+, Pinterest, and LinkedIn. The study was fielded in October 2014, and includes tracking data from the past three years.

The fee for this report is $10,000 and includes an in-person presentation of relevant findings. Any travel expenses for the presentation would be billed separately at cost. We can also provide additional custom analyses based on the content areas or targeted consumers of greatest interest to your business.

To purchase the study or for more information, contact:

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DETAILED TOPIC OUTLINE

SOCIAL NETWORK OVERVIEW & GROWTH

- Social network use tracked over six years; future projections
- Key demographic trends over time
- Time spend trends
- For extensive list of social networks (Facebook, Twitter, Google+, LinkedIn, Pinterest, Instagram, Snapchat, Vine, YouTube, Tumblr, Foursquare, Reddit, Flickr, Yelp, Ello, Nextdoor, Yik Yak):
    - Current and projected market size/quantity of users
    - Current and expected time spend
    - Frequency of use
    - Lapsed users
    - Drivers of decreased engagement
    - Devices used to access
    - Satisfaction

DEEP DIVE INTO MAJOR SOCIAL NETWORKS (Facebook, Twitter, Pinterest, Instagram; more limited for LinkedIn)

- Usage behaviors
- Drivers of use
- Attitudes toward site
- Engagement opportunities (current usage vs. interest in content/activities)
- Current and expected time spend by device (computer/laptop, smartphone, tablet)
- Activities by device
- Content sharing behaviors
- Video viewing – genres, sources, devices

ENGAGEMENT WITH BRANDS (Facebook, Twitter, Pinterest, Instagram)

- Types of companies/brands/people/organizations 'liked' or followed
- Drivers of liking/following brands
- Relationship with companies/brands followed (prospective customer, existing customer, regular consumer of content, etc.)
- Preferences for engaging with companies/brands
- Impact of following companies/brands
- Retailer engagement – specific content consumed from retailers overall and by device

FACEBOOK, TWITTER, AND INSTAGRAM ADVERTISING

- Awareness of advertising
- Frequency of clicking on both sponsored posts and video ads, including device-specific frequencies
- Frequency of accidentally clicking on ads
- Attitudes toward sponsored posts
- Categories of sponsored posts seen (industries such as cosmetics, insurance, fast food, etc.)
- Actions taken as result of sponsored posts

MESSAGING APPS

- Use of the leading messaging apps, including Kik, Snapchat, WeChat, WhatsApp, Facebook Messenger, Line, Tango, Viber, KakaoTalk, Nimbuzz, iMessage, Whisper, Secret, and Google Hangouts
- For the above messaging apps:
    - Satisfaction
    - Frequency of use
    - Attitudes toward app
    - Changes in expected time spend
- Drivers of messaging app use
- Behaviors and engagement
- Spend on messaging apps

SOCIAL TV

- Frequency of discovering new TV shows by social network
- TV-related content consumption by social network (see what shows friends are watching)
- TV-related content sharing by social network (comment about what TV shows are being watched)
- Frequency of tune-in driven by social networks
- Engagement with TV show/network brands by site (‘like’, follow, etc.)
- Simultaneous TV viewing/social network use
- Use of social TV apps

SOCIAL NETWORKS AND SHOPPING

- Use of social networks while shopping online and offline
- Role of social networks in shopping process
- Shopping-related activities by major social network
- Untapped opportunities for social network content/activities to aid shopping
- Interest in purchasing products from long list of social networks
- Engagement with retailers by social network
- Specific retailer content consumed by social network and device

SOCIAL MEDIA AS NEWS SOURCE

- News consumption by social network
- Types of news consumed overall and by social network (local, national, entertainment, etc.)
- Engagement with news media (local newspaper, local TV station, etc.) on each social network (‘like’, follow, etc.)
- Use of social media for discovering and tracking breaking news
- Importance of getting news as a driver of social media use

DATING WEBSITES/APPS

- Use of leading dating apps including Match.com, Tinder, OKCupid, Hinge, Grindr, eHarmony, and Plenty Of Fish

Other data to enable cuts:

GENERAL MEDIA BEHAVIORS

- Frequent media activities across platforms (reading newspapers, watching TV, using tablets, etc.)
- Type of television service and specific service provider
- Premium TV network subscriptions
- Television channels/networks viewed regularly
- TV genre preferences
- Video on demand use
- Online video use
- Over-the-top video services used
- Type of smartphone used and activities
- Type of wireless tablet used and activities
- Video gaming behaviors

DEMOGRAPHICS

- Gender
- Age
- Generation
- County Size
- Racial background
- Occupation
- Education
- Marital status
- Number and ages of children in household
- Household income