

STATE OF THE MEDIA:
THE SOCIAL MEDIA REPORT

Q3 2011



SOCIAL MEDIA

's popularity continues to grow, connecting people with just about everything they watch and buy. Whether it's a brand icon inviting consumers to connect with a company on LinkedIn, a news ticker promoting an anchor's Twitter handle or an advertisement asking a consumer to "Like" a product on Facebook, people are constantly being driven to social media. The latest Nielsen insights provide some answers on exactly how powerful this influence is on consumer behavior, both online and off.

In the U.S., social networks and blogs reach nearly 80 percent of active U.S. Internet users and represent the majority of Americans' time online. The value of the time consumers spend online and on social networks and blogs continues to grow, most visible through the influence on purchase decisions. For instance, 60 percent of people who use three or more digital means of research for product purchases learned about a specific brand or retailer from a social networking site. Forty-eight percent of these consumers responded to a retailer's offer posted on Facebook or Twitter.

As the influence of social media – and those using social media – continues to grow, it's crucial for traditional media, retailers, brands and advertisers to understand how different consumer segments use and share content. Nielsen's "State of the Media: The Social Media Report – Q3 2011" presents a snapshot of the current social media landscape and audiences in the U.S. and other major markets.

KEY FINDINGS

- Social networks and blogs continue to dominate Americans' time online, now accounting for nearly a quarter of total time spent on the Internet
- Social media has grown rapidly – today nearly 4 in 5 active Internet users visit social networks and blogs
- Americans spend more time on Facebook than they do on any other U.S. website
- Close to 40 percent of social media users access social media content from their mobile phone
- Social networking apps are the third most-used among U.S. smartphone owners
- Internet users over the age of 55 are driving the growth of social networking through the Mobile Internet
- Although a larger number of women view online video on social networks and blogs, men are the heaviest online video users overall streaming more videos and watching them longer
- 70 percent of active online adult social networkers shop online, 12 percent more likely than the average adult Internet user
- 53 percent of active adult social networkers follow a brand, while 32 percent follow a celebrity
- Across a snapshot of 10 major global markets, social networks and blogs reach over three-quarters of active Internet users
- Tumblr is an emerging player in social media, nearly tripling its audience from a year ago

Social Networks and Blogs: Still the Top Destination Online

Social Networks and Blog sites rule Americans' Internet time, accounting for 23 percent of time spent online, more than twice the amount of time spent on the #2 category, Online Games. To further put this into context, time spent on the 75 "Other" online categories combined only accounts for 35 percent of Americans' total Internet time.

Top 10 online categories by share of total Internet time >>
Home and Work (May 2011)



* OTHER. In order of total minutes spent, highest to lowest:

multi-category entertainment • adult • Internet tools/web services • mass merchandiser • corporate information • sports • kids/games/toys • universities • reserach tools • apparel/beauty • educational resources • full service banks & credit unions • government • health/fitness/nutrition • multi-category telecom/internet services • gambling /sweepstakes • music • coupons/rewards • isp • home & garden • hardware manufacturers • personals • career development • financial news & information • broadcast media • food & cooking • maps/travel info • real estate/apartments • photography • weather • cellular/paging • special interest news • automotive information • targeted portals & communicaties • multi-category travel • books • multi-category home & fashion • financial tools • computer & consumer electronics news • multi-category computers & consumer electronics • directories/local guides • airlines • shopping directories/guides • humor • insurance • non-profit • delivery/stampes • multi-category news & information • credit card • multi-category finance/insurance/investments • hotels/hotel directories • genealogy • online trading • religion & spirituality • web hosting • family resources • multi-category family & lifestyles • arts/graphics • pets • ground transportation • events • loans • parts & accessories • automotive manufacturer • destinations • cruise lines • greeting cards • gifts & flowers • multi-category special occasions • free merchandise • holidays & special events • multi-category automotive • military • multi-category education & careers • long distance/local carrier

Females and 18-34-Year-Olds Most Active Social Networkers

Females make up the majority of visitors to social networks and blogs, and people aged 18-34 have the highest concentration of visitors among all age groups. Americans aged 35-49 are also avid visitors: 4 percent more likely than average to visit social networks and blogs than they do any other site and 27 percent of these sites' audience.

Who is the average visitor to social networks and blogs? >>
Unique Audience Composition Index, Home and Work (May 2011)

Read as: During May 2011, U.S. Internet users aged 18-34 were 8 percent more likely than average to visit Social Networks and Blogs

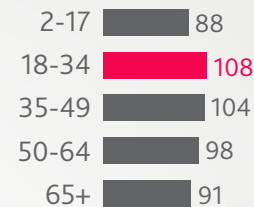
GENDER

The average visitor is female



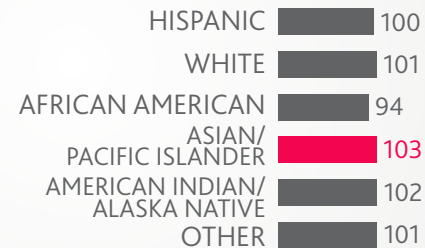
AGE

She is between 18 and 34



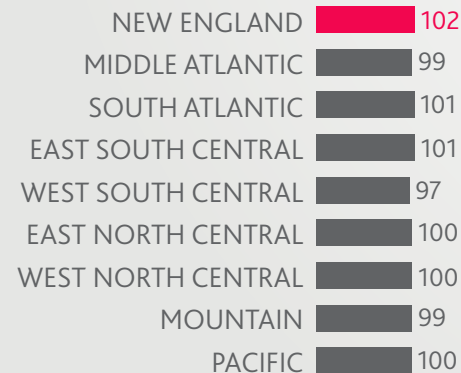
RACE/ETHNICITY

She is likely Asian or Pacific Islander



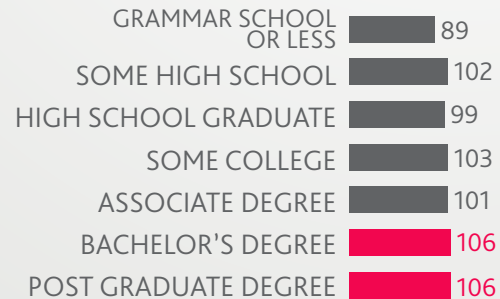
LOCATION

She likely lives in New England



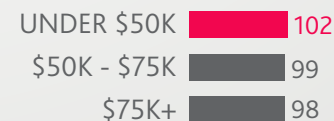
EDUCATION

She has obtained a Bachelor's degree



HOUSEHOLD INCOME

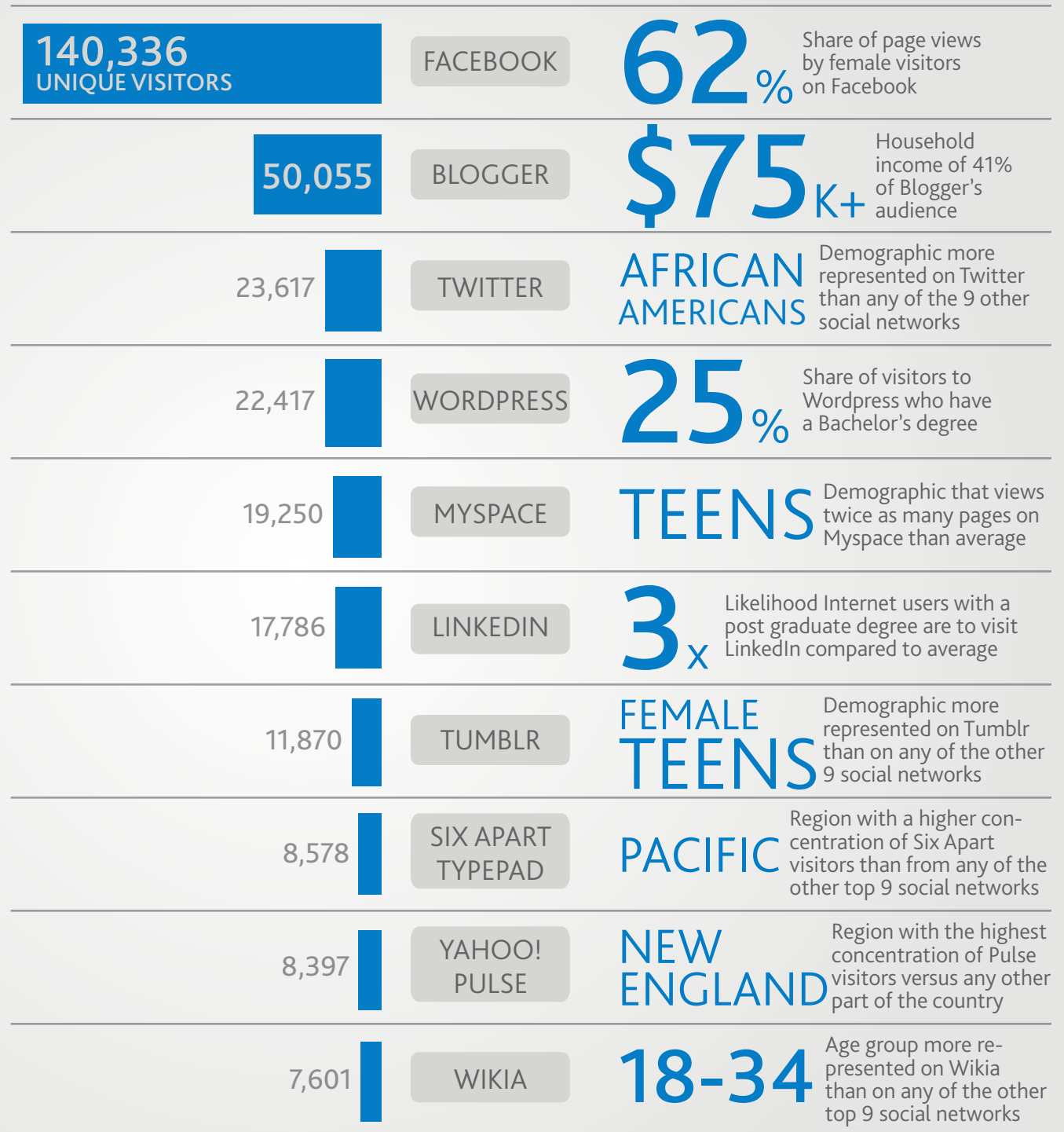
Her household income is less than \$50,000 per year



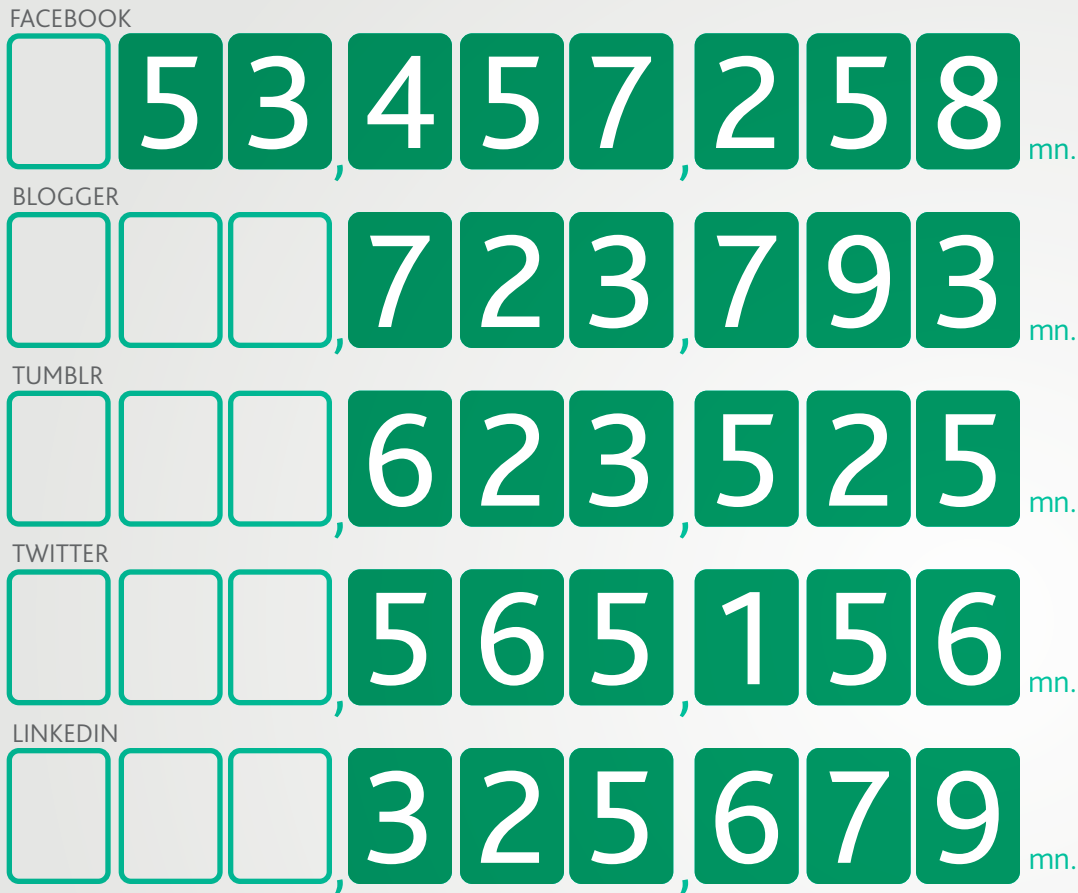
Men are More Likely to Visit LinkedIn and Wikia

Social networking as a whole skews female – and so do nine of the top 10 U.S. social networks and blogs – but LinkedIn and Wikia are the only sites in the category where the percentage of men visiting the respective site exceeds the percentage of total active male Internet users (47%). Facebook continues to reign supreme as the top U.S. social network with over 140 million visitors during May 2011 – nearly 3-times the audience of the #2 site, Blogger – and reaching 70 percent of active U.S. Internet users.

[Top 10 U.S. Social Networks and Blogs >>](#)
[Unique Audience \(000s\), Home and Work \(May 2011\)](#)



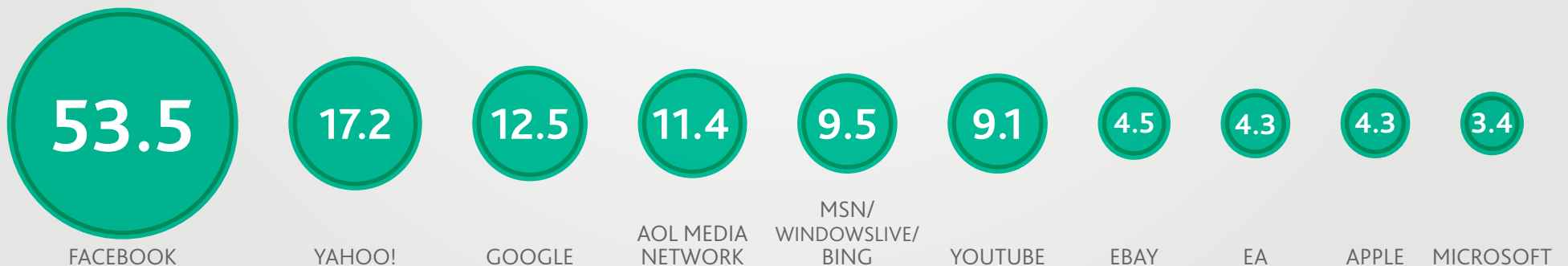
Top 5 U.S. Social Networks and Blogs
Total minutes (000s), Home and Work (May 2011)



U.S. Internet Users Spend More Time on Facebook than Any Other Web Brand

Facebook has become synonymous not only with social media, but with Web use more generally, as Americans spend more time on Facebook than on any other site.

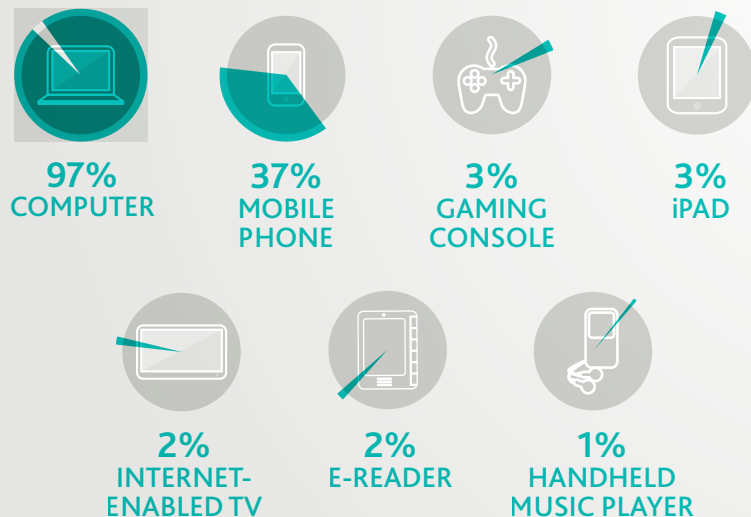
Top 10 U.S. Web Brands by Total Minutes, in Billions, Home and Work (May 2011)



Mobile Social Media Use is on the Rise

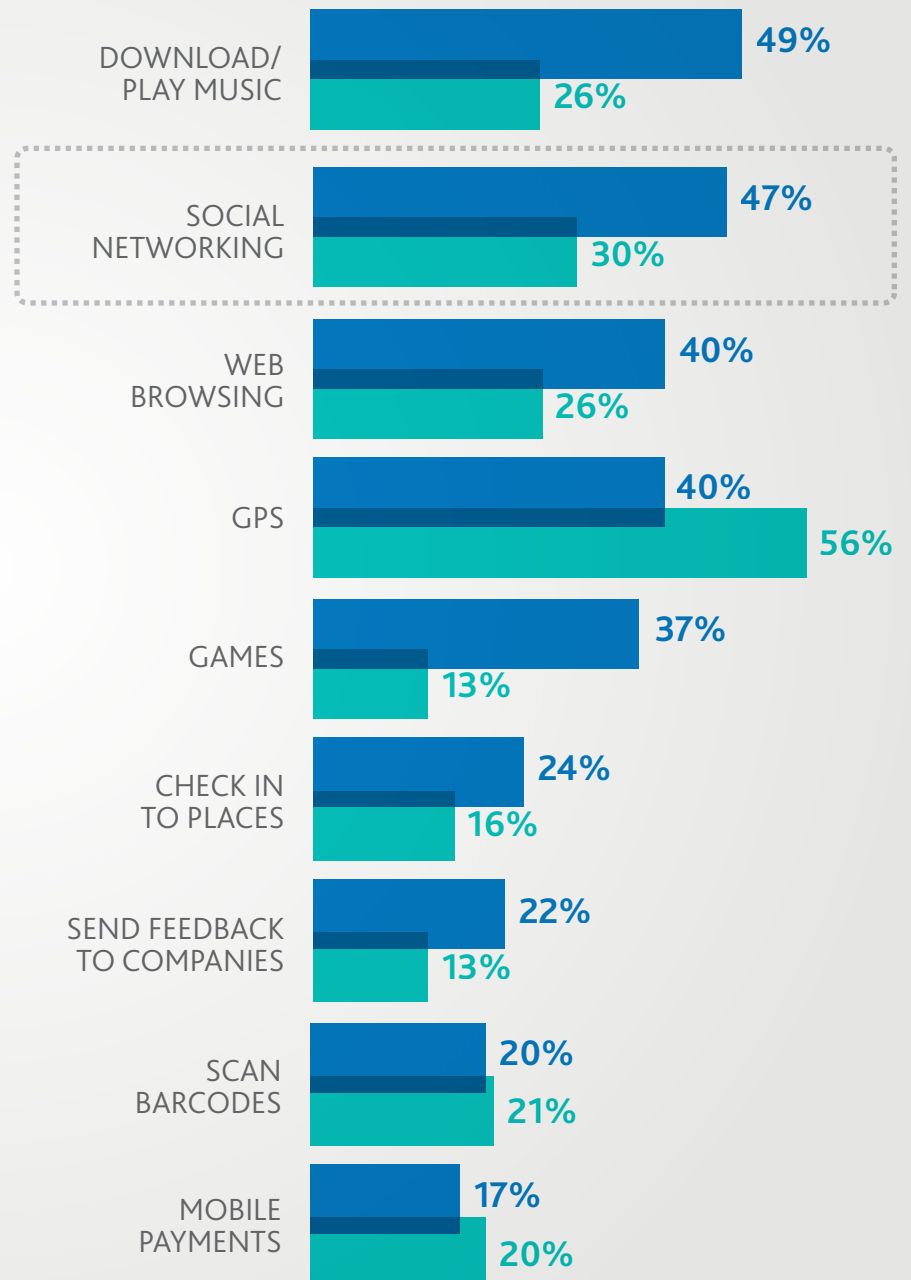
The ability to access social media is a commonly used feature among mobile owners. According to a recent study by NM Incite, a Nielsen/McKinsey Company, nearly 2 in 5 social media users access these services from their mobile phones.

How do consumers access social media?



How does social networking compare to other features consumers have on their phones? And what features do they value most?

● Have featured ● Most valued



Social Networking App Usage Up 30% from 3Q 2010

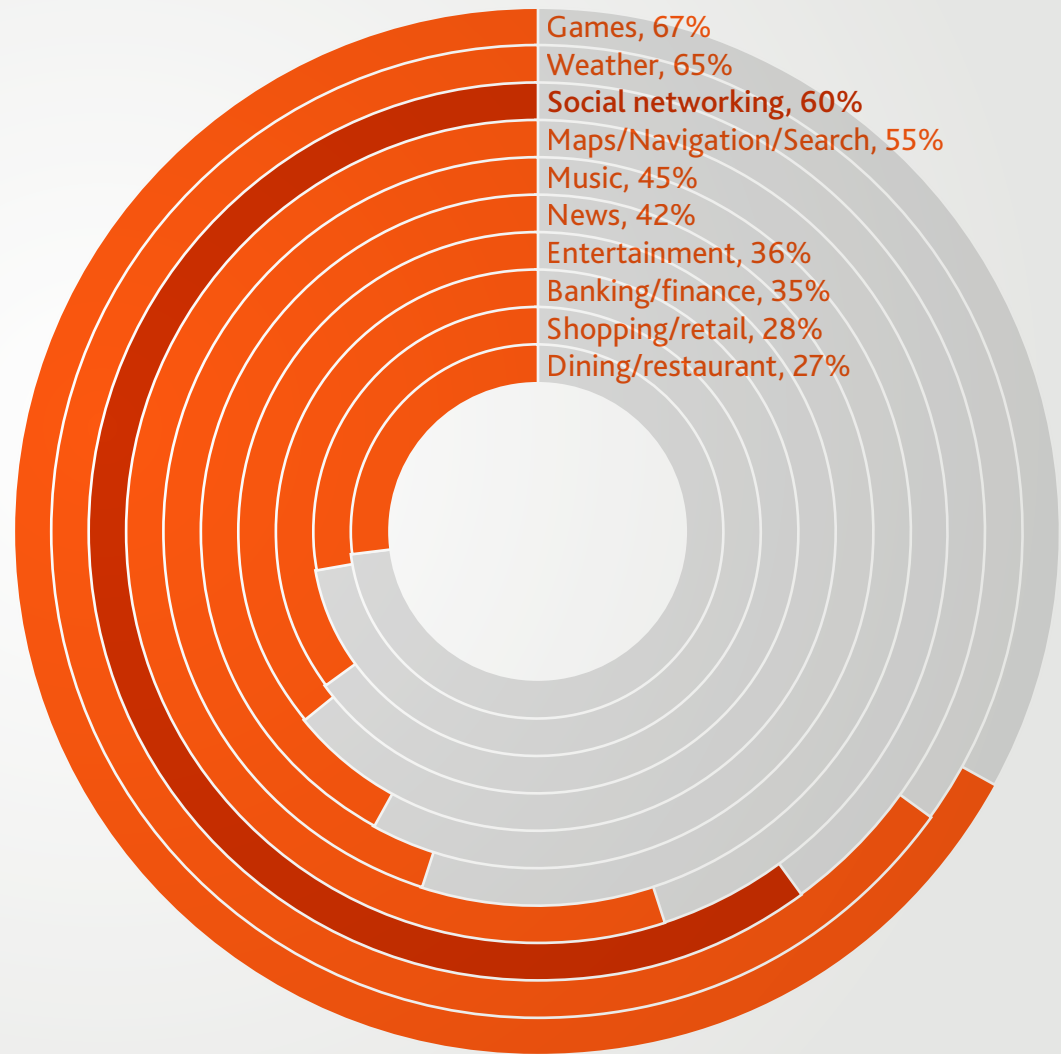
Social networking's popularity extends across devices as it is the third most-used type of mobile application among U.S. smartphone owners who download apps. Facebook ranks as the most popular app across all operating systems and Twitter is the #5 most used app on BlackBerry and Windows Mobile operating systems.

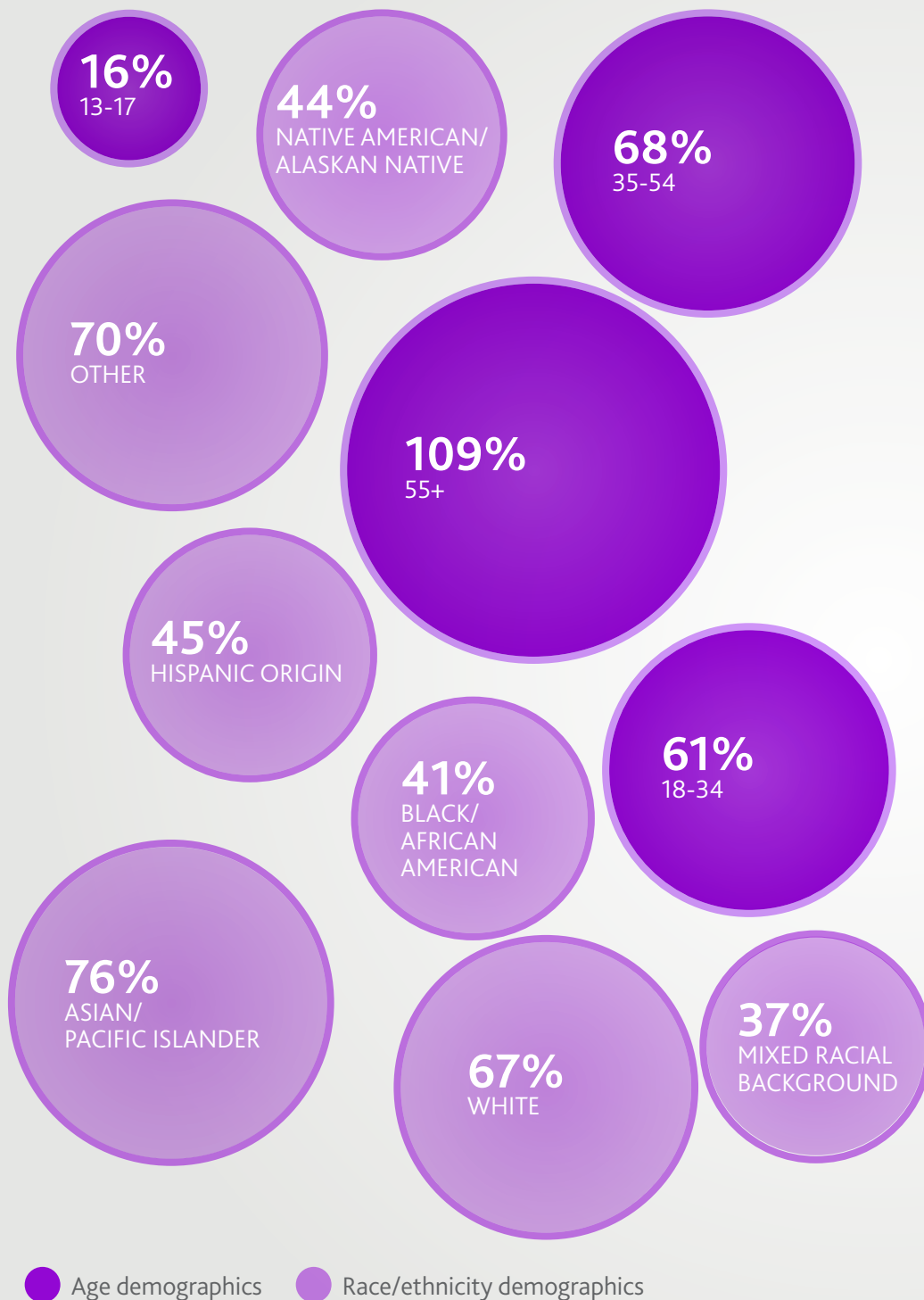
Percentage of Social Networking App Users by Age

13-17 18-24 25-34 35-44 45-54 55+

FACEBOOK	9%	20%	29%	20%	12%	10%
TWITTER	6	18	37	23	10	6
LINKEDIN	3	10	27	26	18	16
MYSFACE	22	20	29	20	6	4
FOURSQUARE	7	21	31	21	13	8

Top 10 Categories of Apps Used by Smartphone Owners Who Download Apps



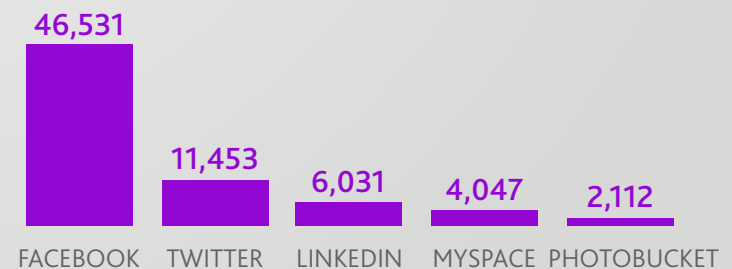


Over Twice as Many People Aged 55+ Visit Social Networking Sites on Their Mobile Phone than Last Year

As app usage in the U.S. continues to grow, it might be assumed that growth is at the expense of the Mobile Internet. This is not the case. Mobile Internet usage - the use of a browser on a mobile device - is alive and well with the unique number of Mobile Internet users in the U.S. up 47 percent over the last year. The Mobile Internet audience to social networking sites is up 62 percent during the same period, as publishers continue to optimize their content across a new generation of connected devices.

<< Year-Over-Year Mobile Internet Audience Growth to Social Networking Sites

Top 5 U.S. Social Networking Sites via Mobile Internet, Unique Audience (000s)

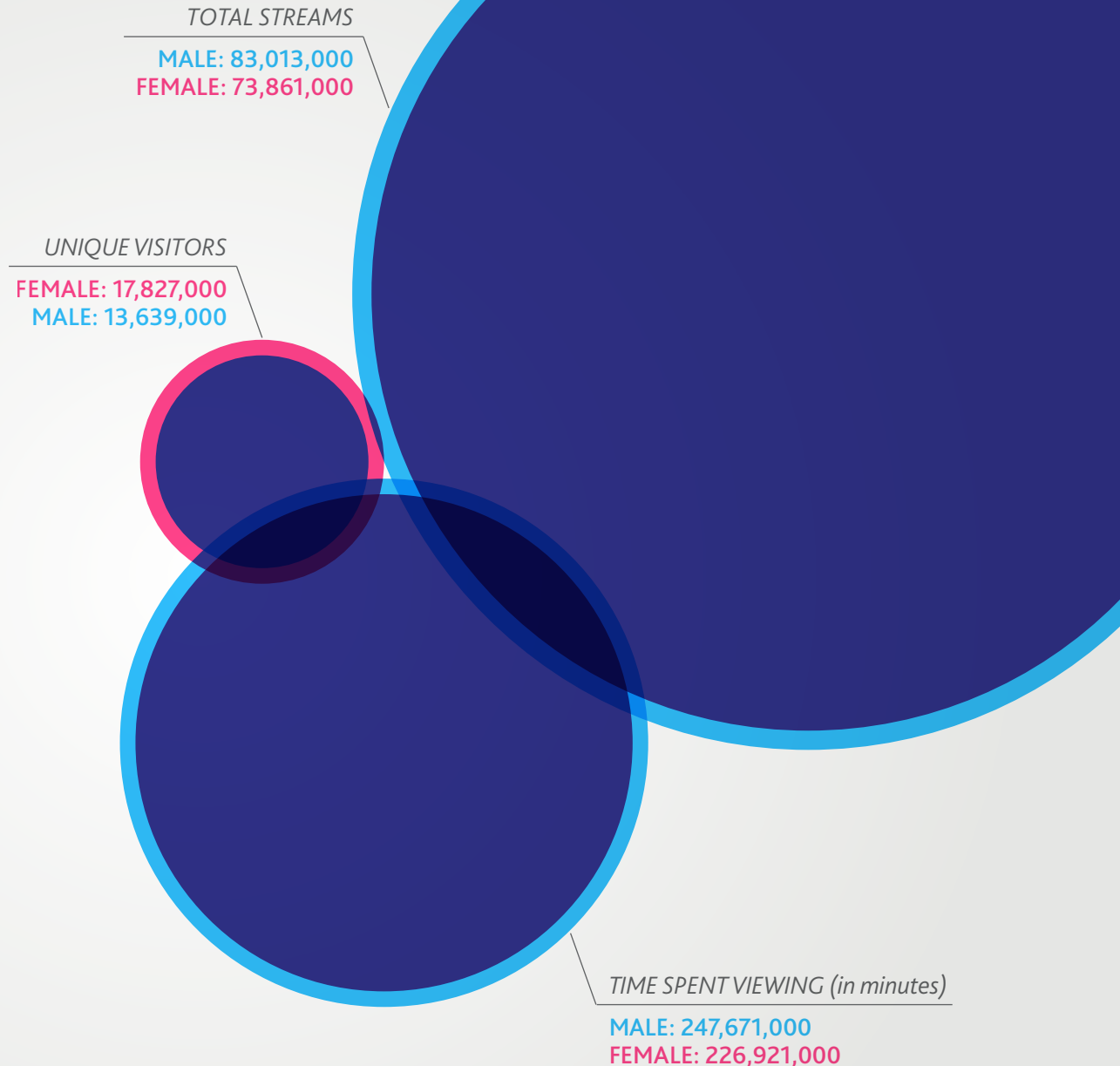


More Women View Video on Social Networks, but Men Watch Longer

During May 2011, over 31 million people in the U.S. watched video content on social networks and blogs, viewing nearly 157 million video streams. Although over 4,000 more women view video on these sites compared to men, men are the heaviest users, streaming more videos and spending 9 percent more time watching.

Video Usage on Social Networks and Blogs by Gender >>
Home and Work (May 2011)

● Female ● Male ● Female & Male



WHEN COMPARED
TO THE AVERAGE
ADULT INTERNET
USER, ACTIVE
ADULT SOCIAL
NETWORKERS ARE...

19%

more likely to attend a
professional sporting
event

45%

more likely to go on
a date

18%

more likely to work out
at a gym or health club

75%

more likely to be heavy
spenders on music

47%

more likely to be heavy
spenders on clothing,
shoes and accessories

26%

more likely to give their
opinion on politics and
current events

33%

more likely to give their
opinion on TV programs

● SOCIAL NETWORKING ACTIVITIES ● OFFLINE ACTIVITIES
● ONLINE SPENDING POWER ● INFLUENCE

Active Social Media Users are Influential Offline

Consumers frequently trust the recommendations of their peers, making social media an ideal platform for influencers to spread their ideas and purchase power. Research by NM Incite shows that 60 percent of social media users create reviews of products and services. In fact, consumer-created reviews/ratings are the preferred source for information about product/service value, price and product quality. Offline, active adult social networkers are more likely than the average adult Internet user to be found at political rallies, professional sporting events and working out at the gym.



53%

of active social
networkers follow
a brand



32%

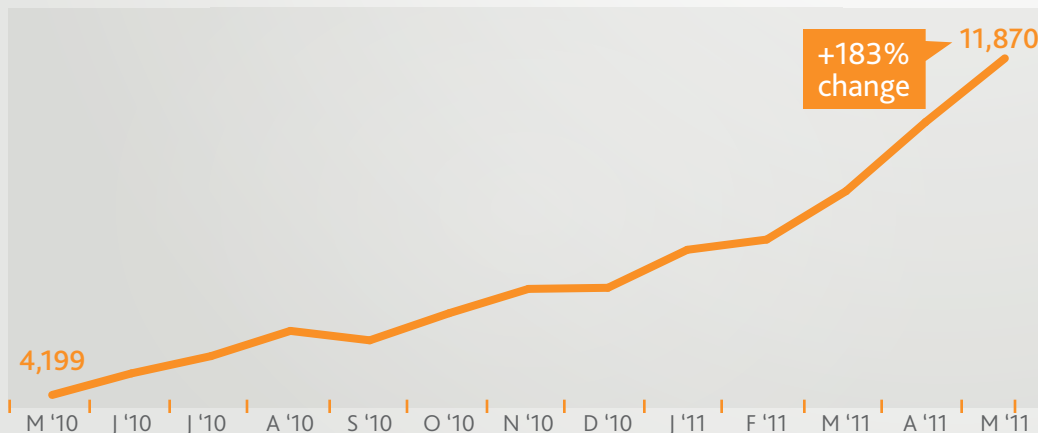
of active social
networkers follow
a celebrity

Emerging Social Network: Tumblr Nearly Tripled its Unique U.S. Audience Over the Last Year

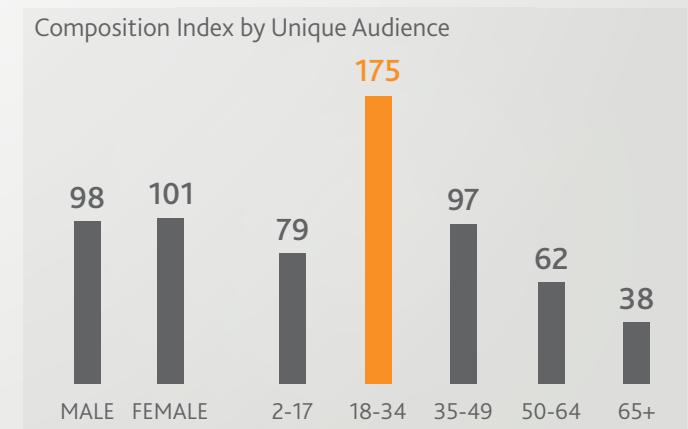
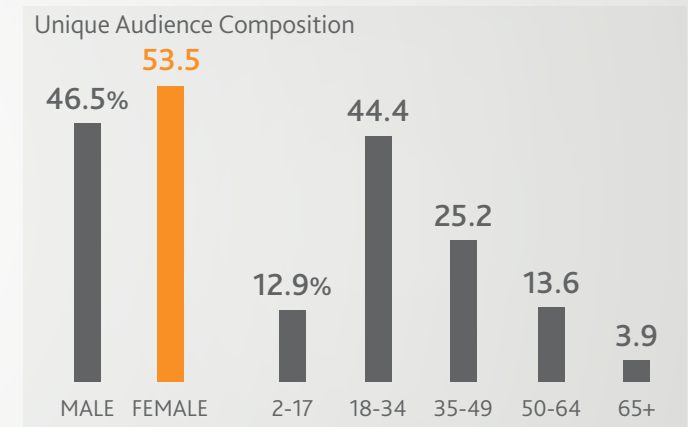
New social networks emerge on a daily basis, creating fresh outlets for consumers and brands alike. Tumblr, which combines elements of blogging and Twitter by letting users post and customize everything from pictures and videos to links and quotes, has grown significantly over the last couple of years to become the 8th largest site in the U.S. Social Networks and Blogs category. An analysis of online buzz by NM Incite shows that Tumblr is also a popular conversation topic, generating an average of 21,280 messages and links per day to the site during May 2011, spreading critical word-of-mouth fueling its viral growth.

Tumblr Unique U.S. Audience (000) Trend, *Home and Work* >>

Read as: During May 2011, Internet users aged 18-34 were 75 percent more likely than average to visit Tumblr



Tumblr U.S. Audience Profile, *Home and Work* (May 2011)



Social Networking around the World

Social networking is indeed a global phenomenon. In a look across a sample of 10 global markets, social networks and blogs are the top online destination in each country, accounting for the majority of time spent online and reaching at least 60 percent of active Internet users.



1 AUSTRALIA

Among Nielsen's 10 Internet-metered markets, Australian Internet users spend the most time visiting social networks and blogs, averaging 7 hours, 17 minutes per person

2 BRAZIL

Orkut is the #1 social networking and blog site in Brazil, visited by 30.3 million Brazilians in May 2011, 11 percent more visitors than #2 site Facebook

3 FRANCE

Nearly a quarter of active French Internet users - 9.6 million - visited #2 social networking site Overblog

4 GERMANY

German Internet users spend more time on social networks and blogs than they do any other online category of sites, a total of 12.7 billion minutes during May 2011

5 ITALY

Italian Internet users spend nearly one-third of their time online visiting social networks and blogs (31% of total Internet time)

6 JAPAN

FC2 Blog – the top social networking site in Japan during May 2011 – was visited by over half of active Japanese Internet users

7 SPAIN

Although Spanish Internet users spend the most total time on #1 site Facebook, they average the most time per person on #4 site Tuenti (4 hours, 42 minutes per person)

8 SWITZERLAND

Social networks and blogs reach 60 percent of active Internet users in Switzerland

9 U.S.

Blogger is now the number #2 social networking and blog site in the U.S. with 50.1 million unique U.S. visitors, up 17 percent from a year ago

10 U.K.

Internet users in the U.K. viewed 229.6 million pages on Tumblr, the second most page views on any social network or blog in the country after Facebook (20.2 billion page views)

FOOTNOTES

2-5 Nielsen, NetView, Home & Work (May 2011).

6 NM Incite, State of Social Media Survey (April 2011). NM Incite's 'State of Social Media Survey' is based on a representative sample of 1,865 adult (18+) social media users who were recruited from the Nielsen Online Panel to take an online survey. "Social media user" is defined as participating, talking, and networking online through various platforms to share information and resources. This includes Internet forums, blogs, Facebook, Twitter, video sharing, consumer rating and other social networking websites. The survey fielded from March 31 to April 14th.

7 Nielsen, Apps Playbook (Q1 2011). Nielsen's App Playbook Q1 2011 is based on a survey of 4,339 mobile subscribers who reported having downloaded a mobile app in the past 30 days. The respondents completed an online, self-administered survey in March 2011.

8 Nielsen, Mobile Media View, All Carriers (May 2011) .

9 Nielsen, VideoCensus, Home & Work (May 2011).

10 Nielsen, @Plan (Release 2 2011). "Active social networkers" is defined as Adult Internet users with 1+ social networking profile AND Posts links/articles/videos/websites. Consumer product review data provided by NM Incite (State of Social Media Survey)

11 Nielsen, NetView, Home & Work (May 2011). Buzz data provided by NM Incite (May 2011)

12 Nielsen, Global Index (May 2011). Nielsen has meter-measured Internet data in 10 major markets: Australia, Brazil, France, Germany, Italy, Japan, Spain, Switzerland, U.K. and U.S.

