



The Social Media Data Stacks

A Research Collection for Marketers



MARKETING CHARTS
DATA INSIGHTS

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The Social Media Data Stacks

“**The Social Media Data Stacks**” is part of Watershed Publishing’s Data Insights series featuring trends, data and research. This collection brings together months of surveys, reports and insights released by nationally recognized research and marketing organizations focused on keeping pace with the latest data about social media – its growth and use.

The charts in this collection are **ready to use, download, format**, and otherwise support your marketing goals. **Feel free to share** the whole presentation or any slide, with your colleagues and business partners, but **please preserve credits** to our sponsor, **HubSpot**, our research partners who provide the source data, and our links to MarketingCharts.com.



MARKETING CHARTS



DATA INSIGHTS

The Social Media Data Stacks

Social media is a powerful force. Consider these facts.

- Social media site users spend **an average of 5.4 hours a month engaged in networking sites.**
- Facebook attracts **734.2 million unique visitors a month.**
- **Half of TV viewers tweet** about TV shows.

It is little wonder that marketers work so hard to keep pace of the social media momentum.

In MarketingCharts' **"The Social Media Data Stacks"** you will get the latest data on the incredible reach and influence of Facebook and other social media sites, as well as critical information on how marketers are reacting to and budgeting for social media.

One of the most surprising statistics is that **68% of CMOs report that they feel "unprepared"** for the challenges of social media marketing. Many of the **45 charts and accompanying analysis** will help provide you with key data that can explain why social media marketing is so challenging, and when done well, so rewarding.

We hope you'll find the information in this data stack helpful to your social media marketing efforts.

Enjoy!

The HubSpot Team





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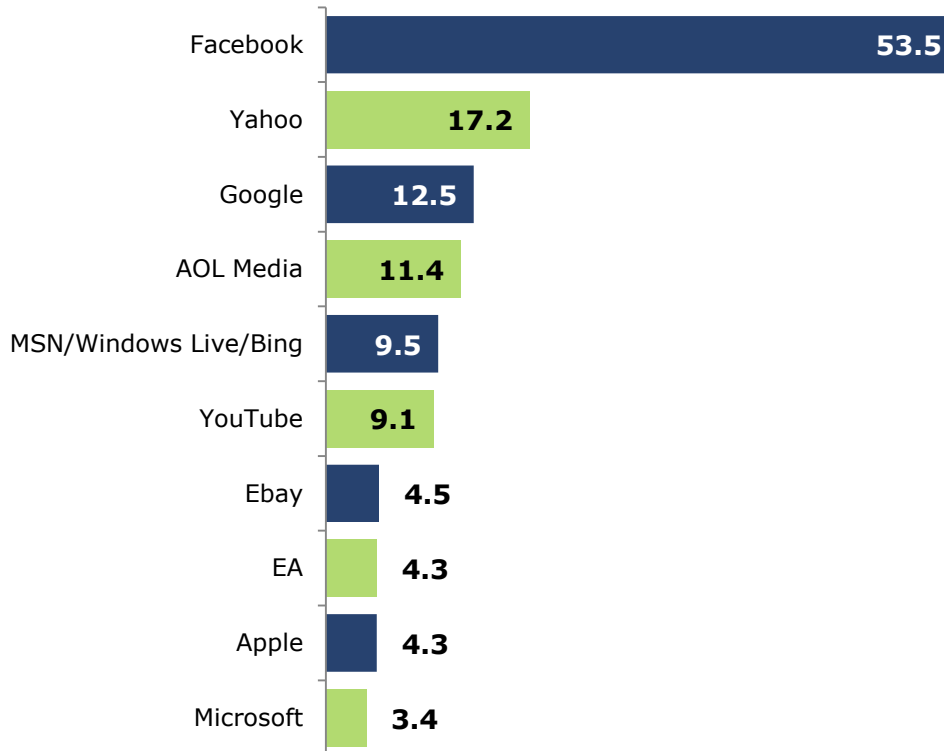
**FACEBOOK,
ET. AL.**

Facebook and the ROW

Top 10 U.S. Web Brands by Aggregate Time Spent

U.S. web users monthly minutes in billions, home and work

Source: The Nielsen Company



We start with a big number first: 53.5 billion minutes per month. Facebook is [dominating the web brands](#).

In looking at a data snapshot of monthly aggregate time spent on a site for Facebook and the ROW (rest of the web), Facebook has toppled some big names. The Nielsen Company data show that even Yahoo users come in a distant second with an average of 17.2 billion minutes per month, less than one-third Facebook's total.

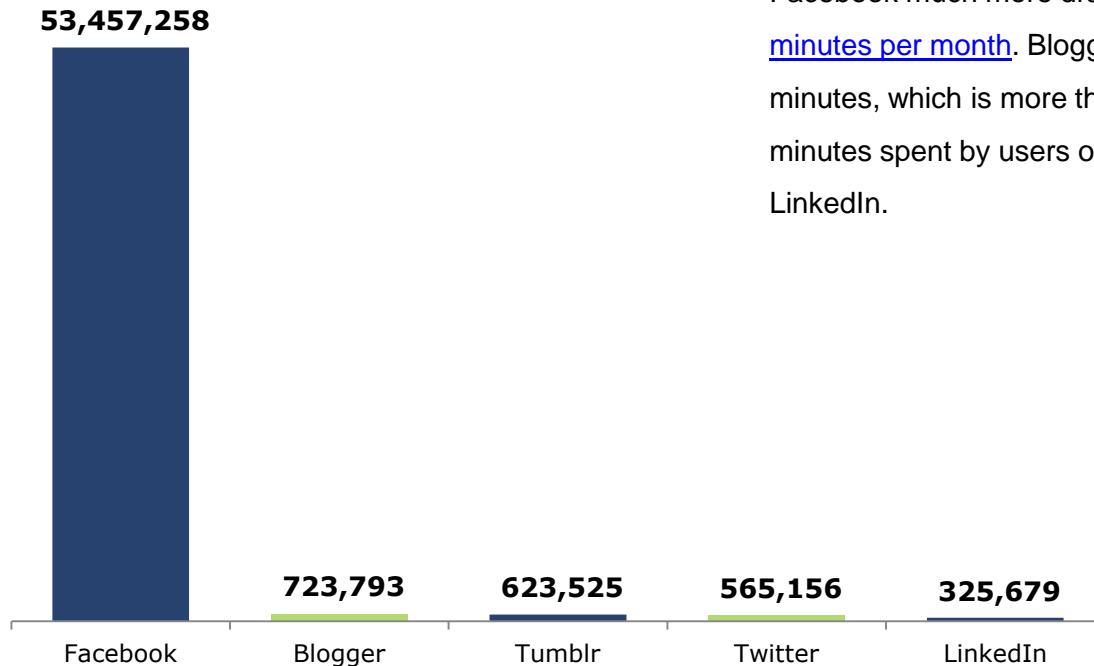
YouTube ranks sixth, claiming 9.1 billion user minutes per month.

Big Time Facebook Dominance

Top 5 U.S. Social Networks and Blogs

Total minutes (000), home and work, May 2011

Source: The Nielsen Company



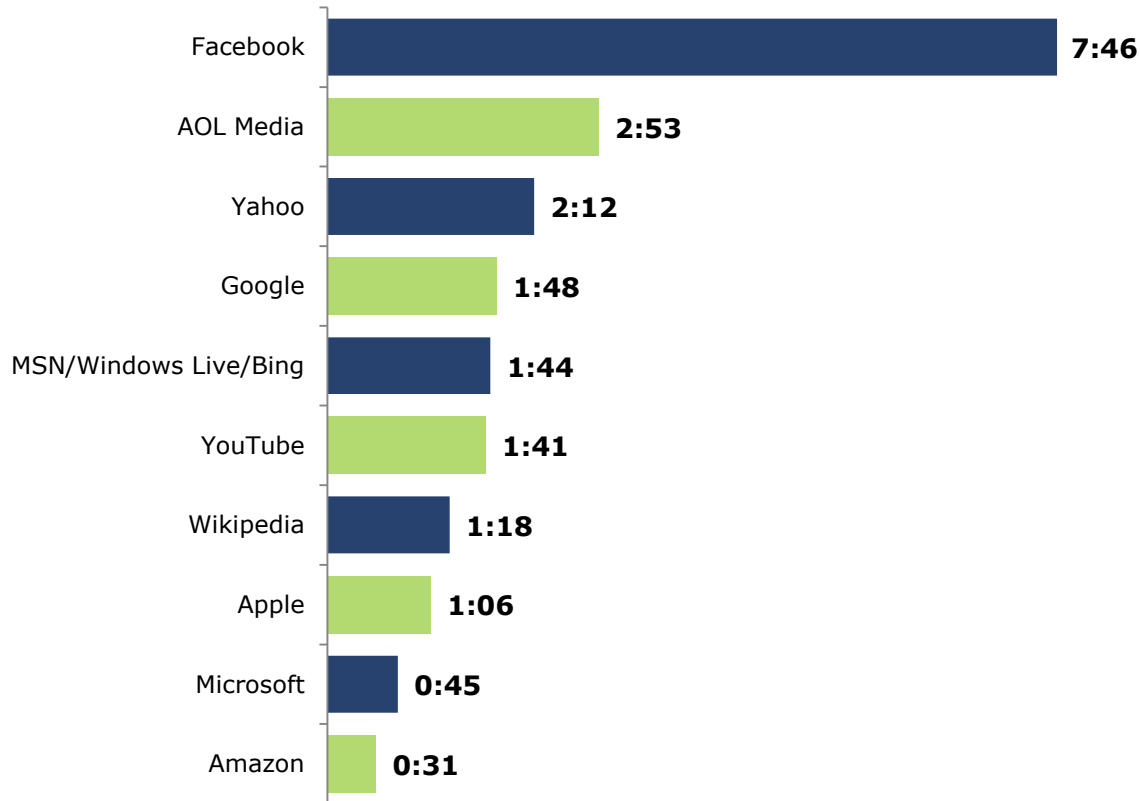
Looking specifically at social networking/blogging sites, the others trail Facebook much more dramatically. [None even come close to 1 billion minutes per month](#). Blogger ranks second with about 724 million monthly minutes, which is more than double the roughly 325 million monthly minutes spent by users of number five social networking/blogging site LinkedIn.

The Facebook User: 5 More Hours on Site

Top 10 Web Brands by Time Spent

Time per viewer, hh:mm, per month, **August 2011**

Source: The Nielsen Company

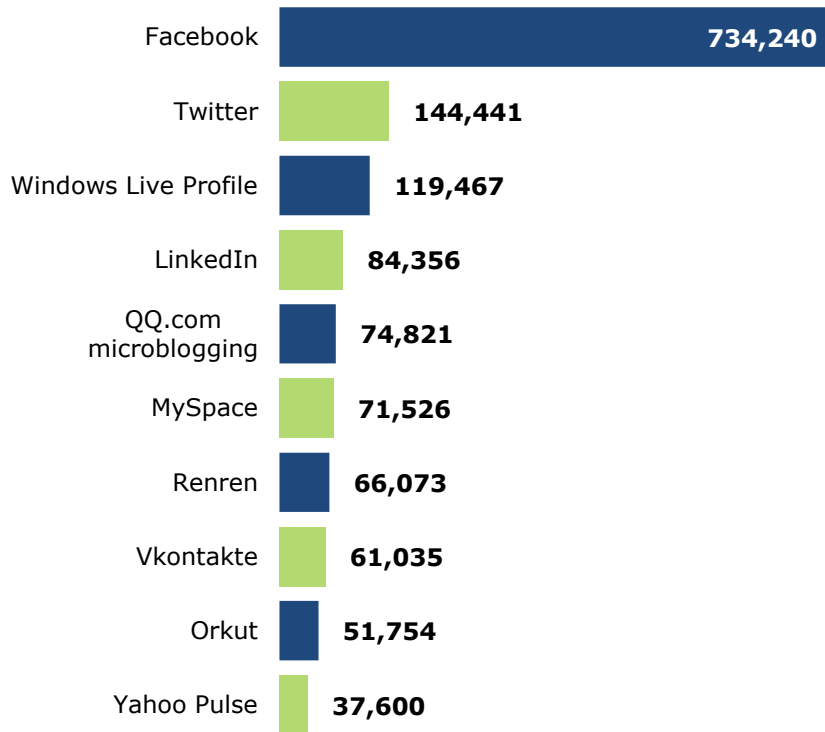


In measuring time spent per user, Nielsen data shows that for the [second straight](#) month, Facebook dominated U.S. web brands in average monthly time during August 2011. The average Facebook user spent seven hours, 46 minutes on the site.

AOL Media Network, averaged two hours, 52 minutes and 52 seconds. YouTube also ranked in the top 10 with an average of one hour, 41 minutes of user time for the month.

Facebook Global: 734 Million Visitors

Top 10 Global Social Networks
By unique visitors (000), **June 2011**
Source: comScore



A September 2011 report from [comScore](#) logs 734.2 million unique visitors to Facebook.com globally in June 2011, an increase of 33% from the previous year.

Meanwhile, Twitter.com climbed its way to the no. 2 position reaching 144.4 million visitors (up 56%), followed by Windows Live Profile at 119.5 million visitors.

Professional social network LinkedIn.com reached more than 84 million visitors globally to secure the no. 4 spot, followed by Chinese site QQ.com microblogging with 74.8 million visitors.

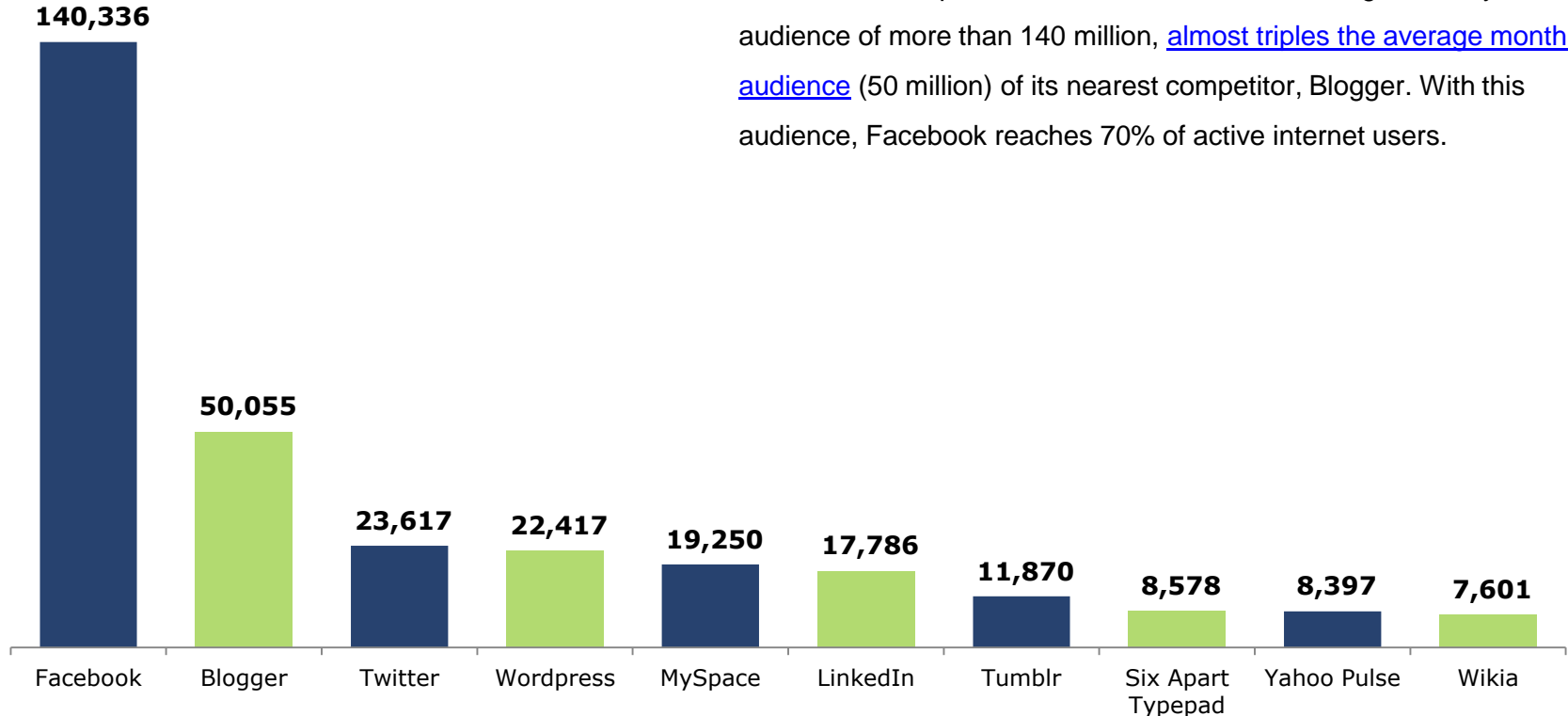
Facebook USA: 140 Million Visitors

Top Network & Blog Sites

Average monthly unique visitors (000), Q3 2011

Source: The Nielsen Company

Looking at the top 10 U.S. social networking/blogging sites during Q3 2011, Nielsen reports that Facebook, with an average monthly audience of more than 140 million, [almost triples the average monthly audience](#) (50 million) of its nearest competitor, Blogger. With this audience, Facebook reaches 70% of active internet users.



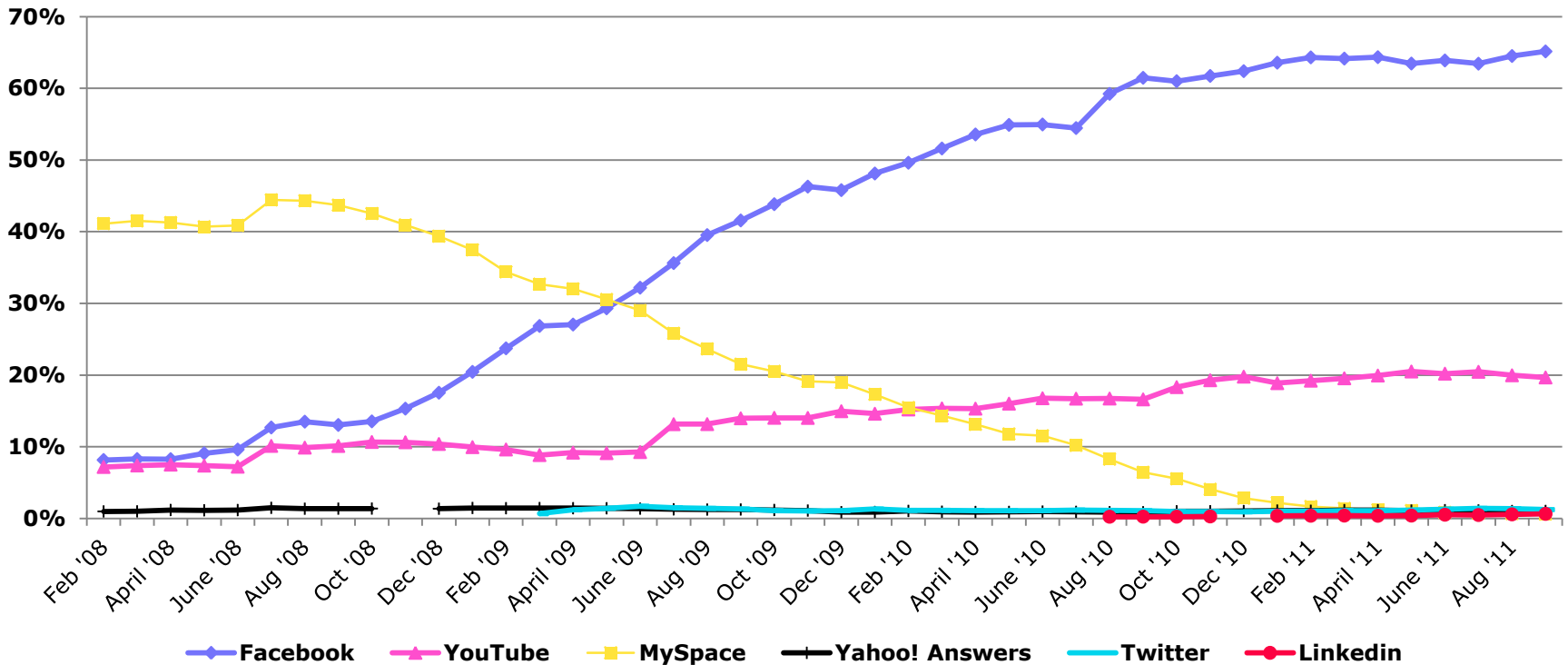


**TRENDS,
SHORT &
LONG**

Rise and Fall; Facebook's Steady Climb

Top Social Networking Sites and Forums
 By US market share of visits (%), **2008-2011**
Source: Experian Hitwise

Experian Hitwise tracks the top 10 social networking sites each month. This chart compiles the monthly data since 2008, but excludes a number of sites that have appeared in the top 10, but dropped off.



M-o-M, LinkedIn Makes Headway

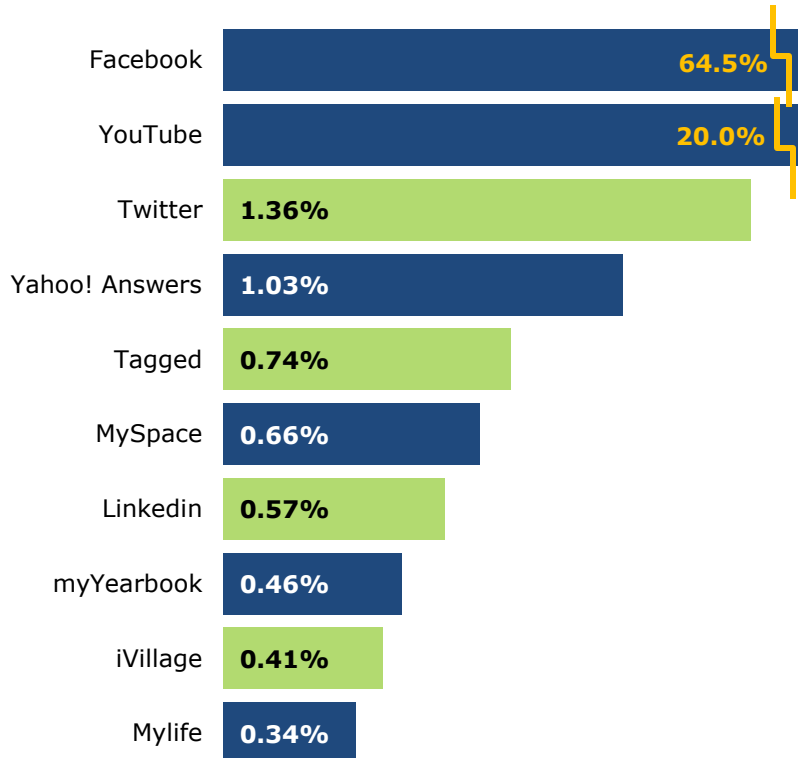
Top Social Networking Sites and Forums

By US market share of visits (%), August & September 2011

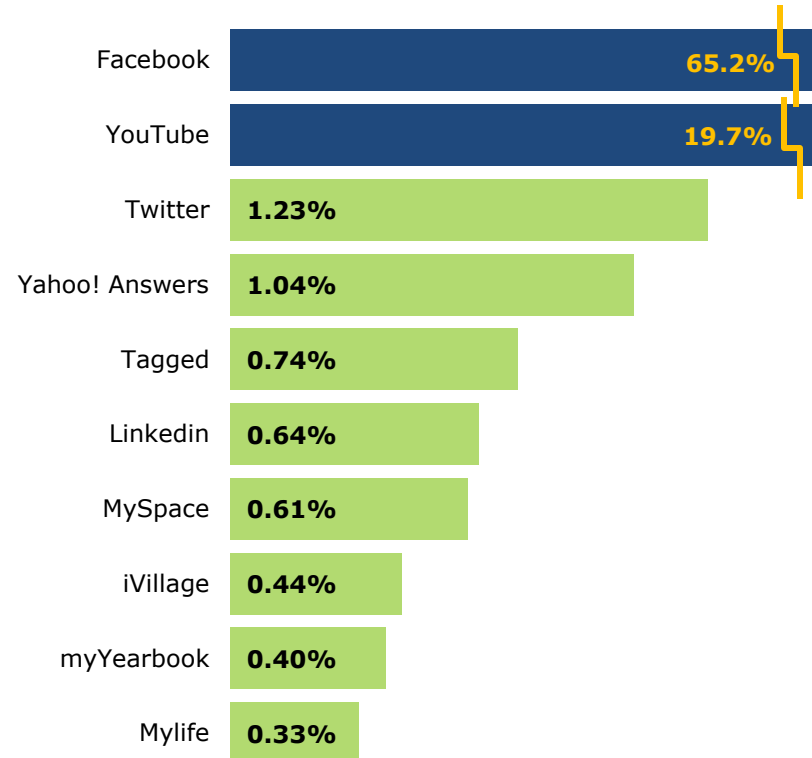
Source: Experian Hitwise

Experian Hitwise data shows more movement up for LinkedIn, a trend noticeable in the past year.

August 2011



September 2011



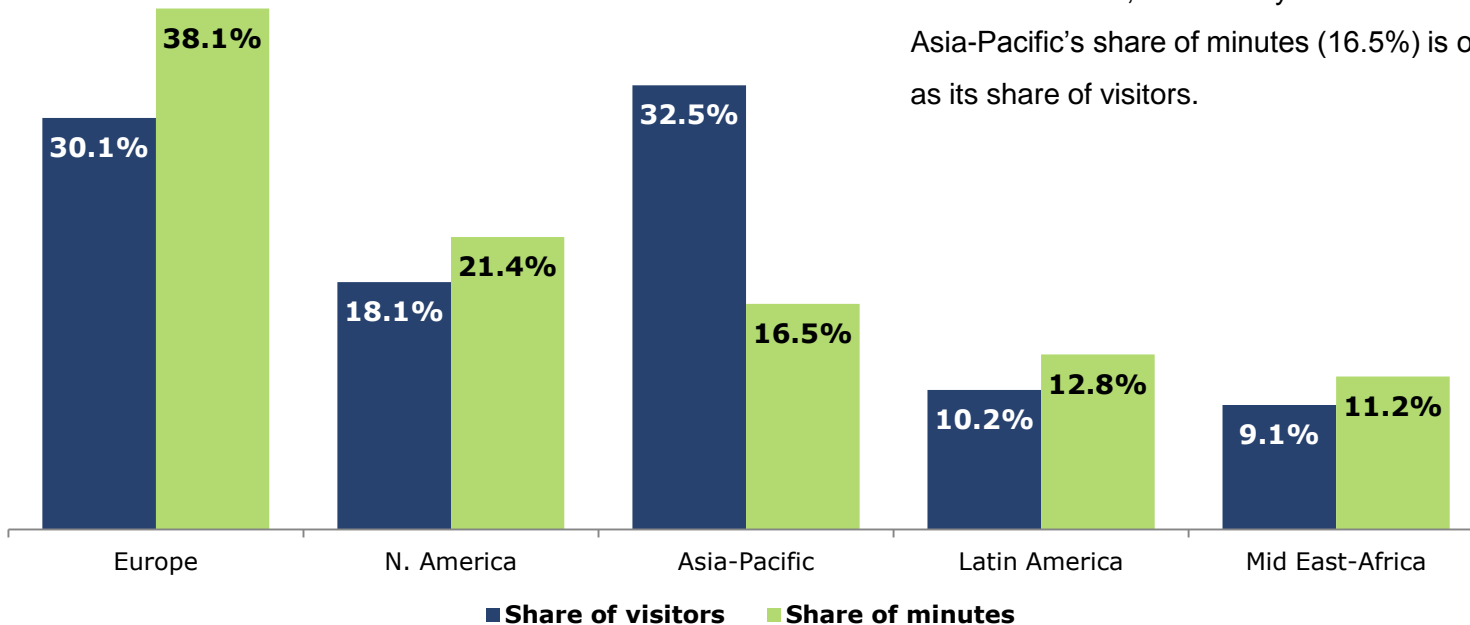
Average Time Spent: 5.4 Hours/Month

Share of Visitors and Time Spent, by Region

% of total, June 2011

Source: comScore

Globally, internet users [averaged 5.4 hours on social networking sites](#) during the month of June, according to comScore. Examining regional social network usage trends, Europe takes a leading 38.1% share of minutes, followed by North America (21.5%). Interestingly, Asia-Pacific's share of minutes (16.5%) is only roughly half as large as its share of visitors.

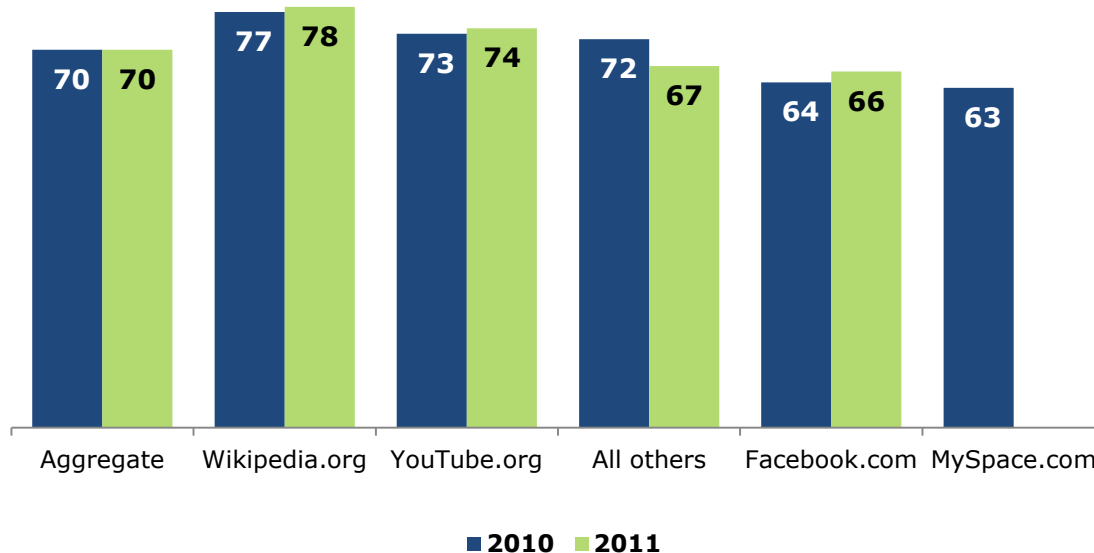


Facebook Scores Lowest for Satisfaction

Social Media Customer Satisfaction Scores

Index: 100-point scale, **2010 v.2011**

Source: ACSI / Foresee Results



Research Note: Twitter.com is not measured individually, because many Twitter users access the service through other websites or platforms. However, Twitter, LinkedIn and other players are represented within the aggregate category score, as well as in the "All Others" category. MySpace had a sample size too small for inclusion in the 2011 study.

Based on customer satisfaction scores, here is one area where Facebook does not win, hands down, [according](#) to the 2011 American Customer Satisfaction Index (ACSI) E-Business Report.

Facebook, despite a 3% improvement year-over-year, is the lowest-scoring site in the social media category as well as of all companies measured.

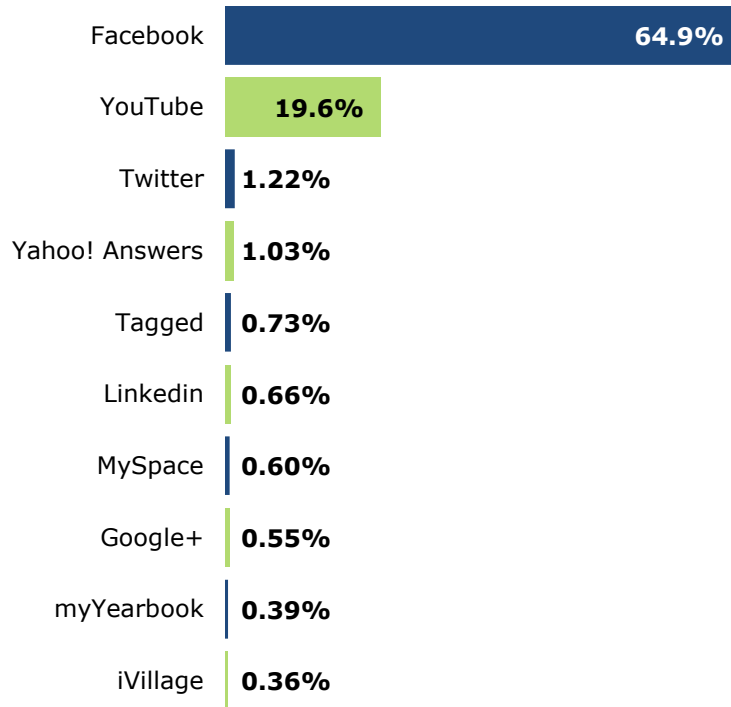
The report found that Google, which scored 83 points, is one of the highest-scoring companies overall.

Google+ Jumps to 8th, 1269% Spike

Top Social Networking Sites and Forums

U.S. market share of visits, **Week ending September 24, 2011**

Source: Experian Hitwise



Enter Google. Google+ emerged as a player in the Social Network and Forums category in late September, Experian Hitwise [reported](#), a day after the site went from “invitation-only” to “open access” and became available to everyone.

Opening access created a massive spike in market share of visits for the site, with a 1269% growth from the week ending September 17 to the week of September 24. The site also received nearly 15 million total US visits last week.

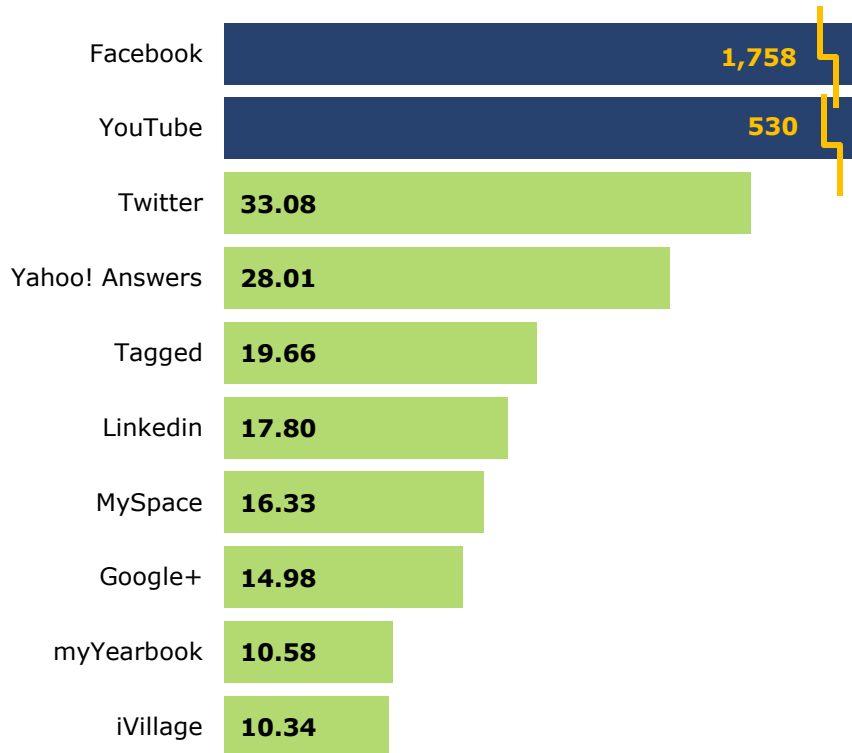
In just one week, Google+ went from ranking as 54th most visited site in the Social Networking and Forums category to 8th place.

Google+ Grabs 15 Million Visitors

Top Social Networking sites and Forums

Total visits, millions **Week ending September 24, 2011**

Source: Experian Hitwise



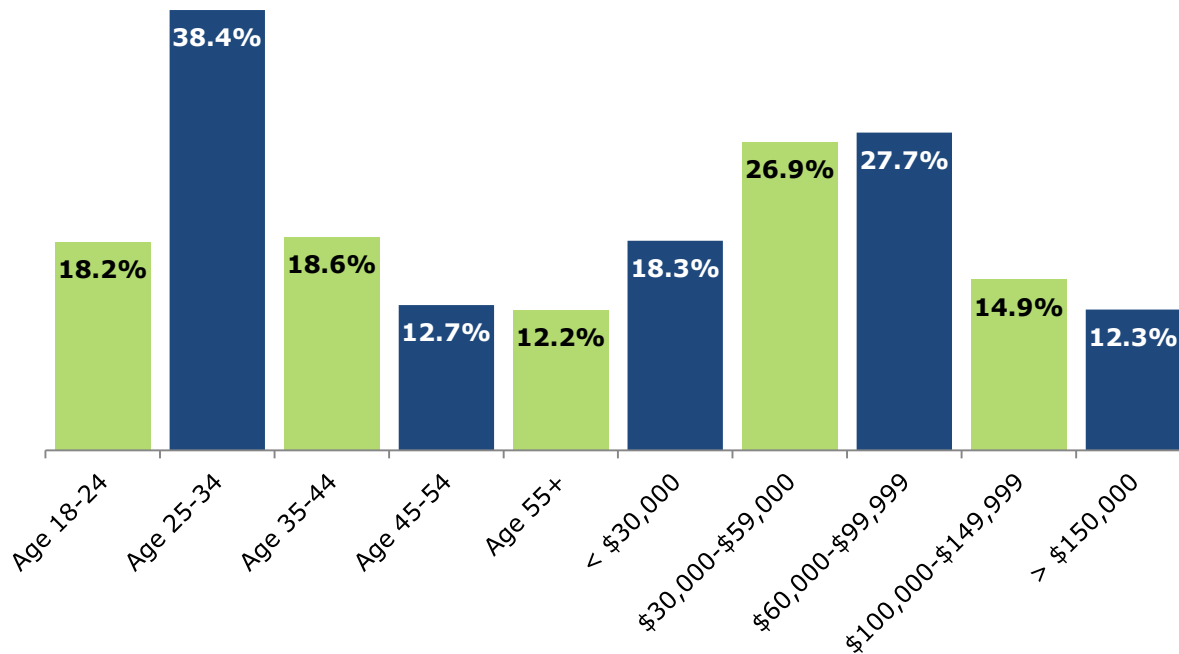
Google+ also received [nearly 15 million total US visits](#) during the week of its initial public offering, according to Experian Hitwise, not quite half of what Twitter attracted in that time. Google+ also created a decent challenge to MySpace and LinkedIn, sites that received about 16 million and 18 million visits, respectively. During the invite-stage of the launch, for week ending July 16, Google+ received 1.86 million total visits.

Google+ Audience Tends to be Affluent

Google+ Site Visitor Statistics, Four weeks ending July 16

% of visitors to Google+ compared to Experian "online population" data, July 2011

Source: Experian Hitwise



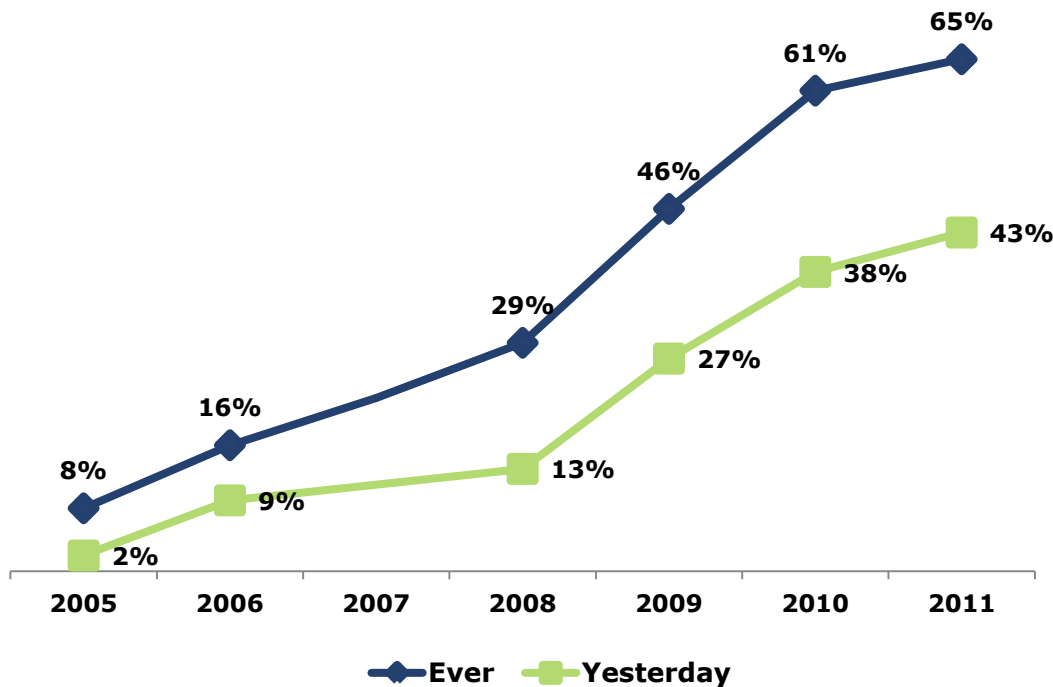
The highest share of visits to Google+ in its first month came from those between the ages of 25-34 and those between 18 and 34, who were more likely than the overall online population to visit. The audience to Google+ tends to be more affluent, over-indexing for those earning a household income of \$60k and over, particularly \$150k and up, [according](#) to analysis from Experian Hitwise.

Site Usage Grows from 8% to 65%

Social Network Site Use Growth

% of online adults, 2005-2011

Source: Pew Internet & American Life Project



[Pew Research](#) found that two-thirds of adult internet users (65%) now use a social networking site like MySpace, Facebook or LinkedIn, up almost 7% from one year ago (61%), and this is about eight times the 8% who said they used social networking sites in 2005.

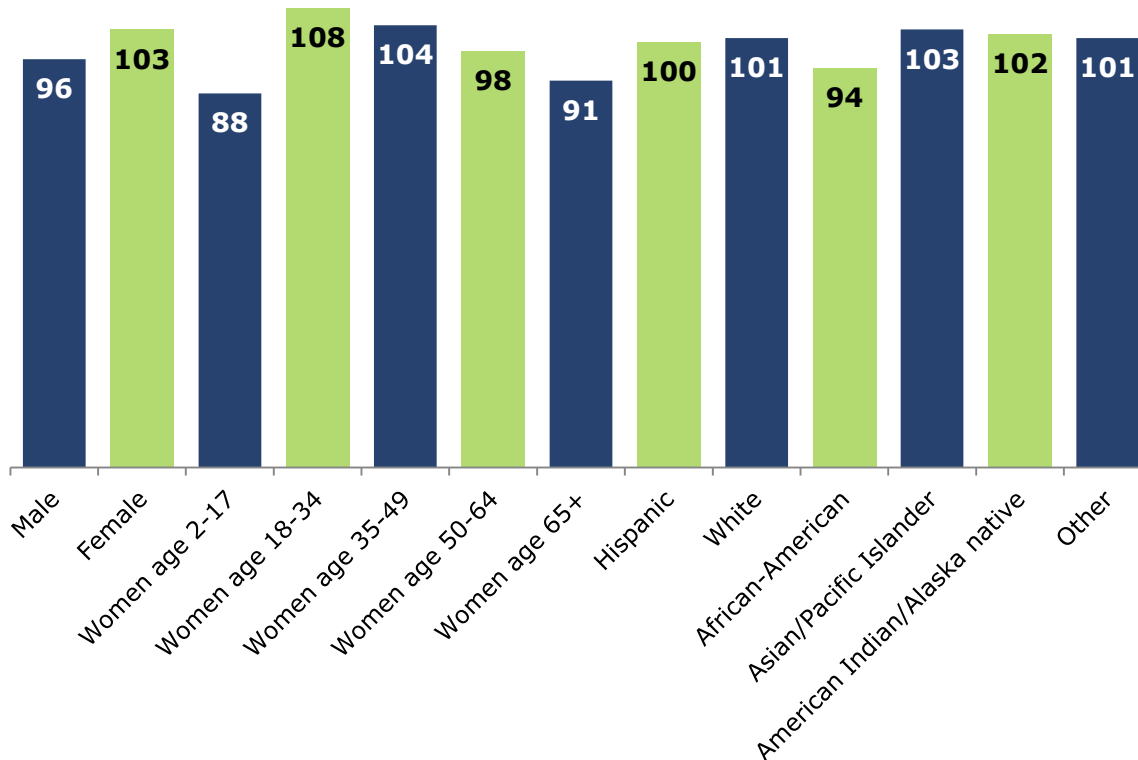
Looking at usage on a typical day, 43% of online adults use social networking. Out of all the [“daily” online activities](#) that Pew polls about, only email (which 61% of internet users access on a typical day) and search engines (which 59% use on a typical day) are used more frequently than social networking tools.

Females, 18-34, Most Active on SocNets

U.S. Social Network Use by Age, Demographics

Base: U.S. social media users, Q3 2011

Source: The Nielsen Company



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, [according to](#) Nielsen data.

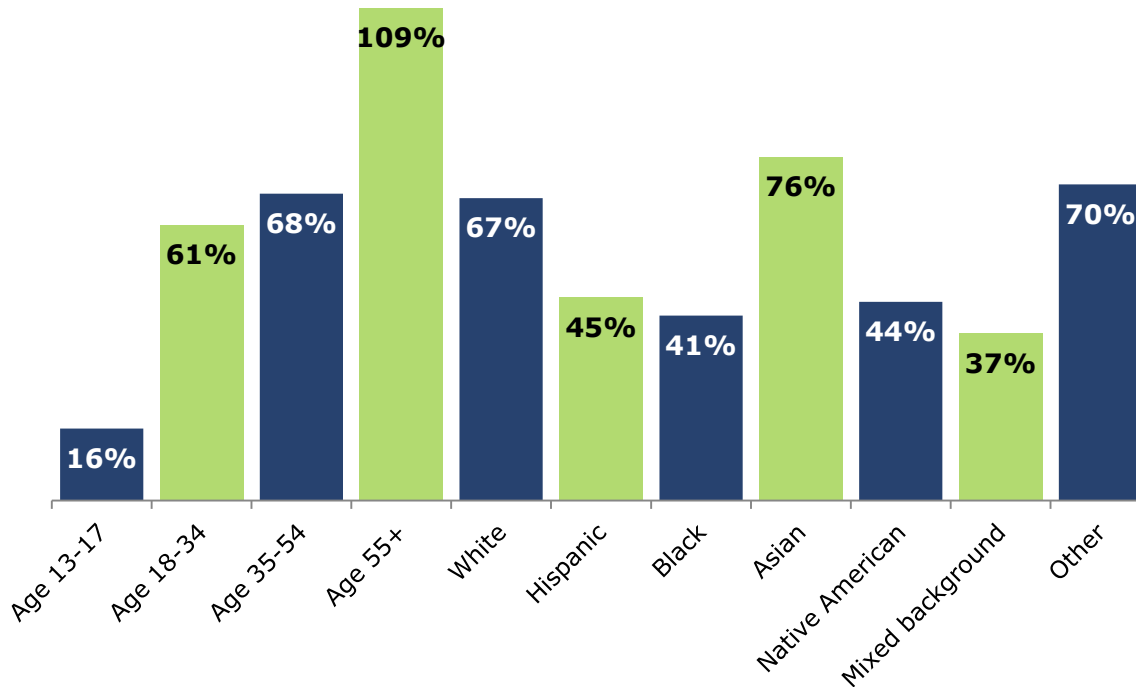
During Q3 2011, women were 3% more likely than average to use social networkers, and 18-to-34-year-olds were 8% more likely than average.

55+ Users Double Mobile Visits

Social Network Growth, by Age, Ethnicity

% change, Q3 2010 v. Q3 2011

Source: The Nielsen Company



Another important area to watch – the convergence of social and mobile.

More than twice as many people age 55 and older visited social networks on their mobile phone in Q3 2011 compared to Q3 2010, [according to](#) data from Nielsen’s “The Social Media Report Q3 2011.” That’s a jump of 109% year-over-year.

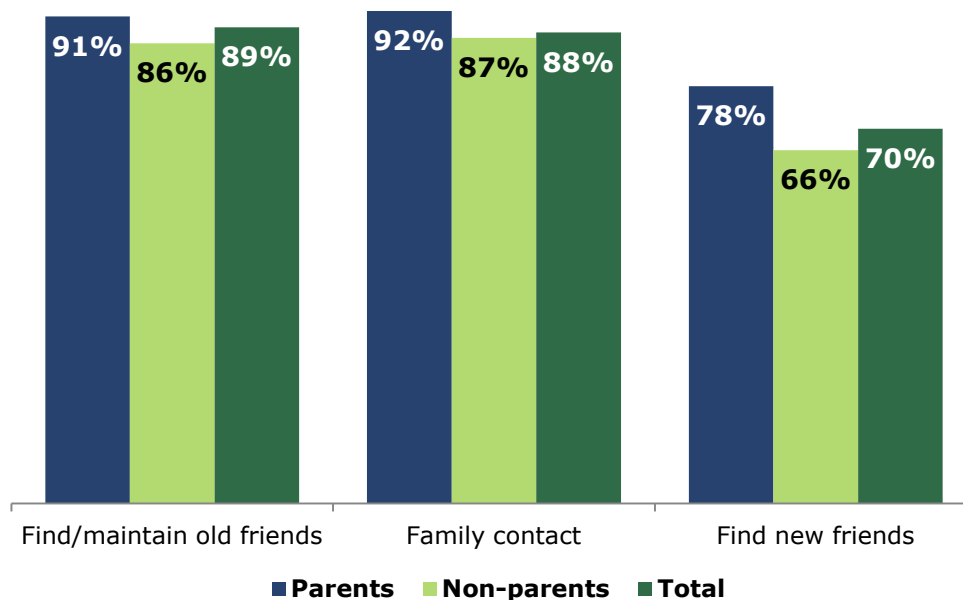
Other demographic groups experiencing notably large growth in mobile social networking compared to Q3 2010 include Asian/Pacific Islanders (76%), 35-to-54-year-olds (68%), whites (67%), and 18-to-34-year-olds (61%).

9 in 10 Parents Seek Friends, Family

Social Media Use for Friend/Family Reasons

% of respondents, **October 2011**

Source: NM Incite



Social networks are most likely to be used for reasons interaction with friends and family, [according to](#) NM Incite's "State of Social Media Survey," this is even more likely among social networkers who are parents.

91% of parents and 86% non-parents who are social networkers, use social networks to find and/or maintain old friends. Family contact closely follows as a reason to use social networks by 92% of parents and 87% of non-parents. Finding new friends is somewhat less popular, cited by 78% of parents and 66% of non-parents.

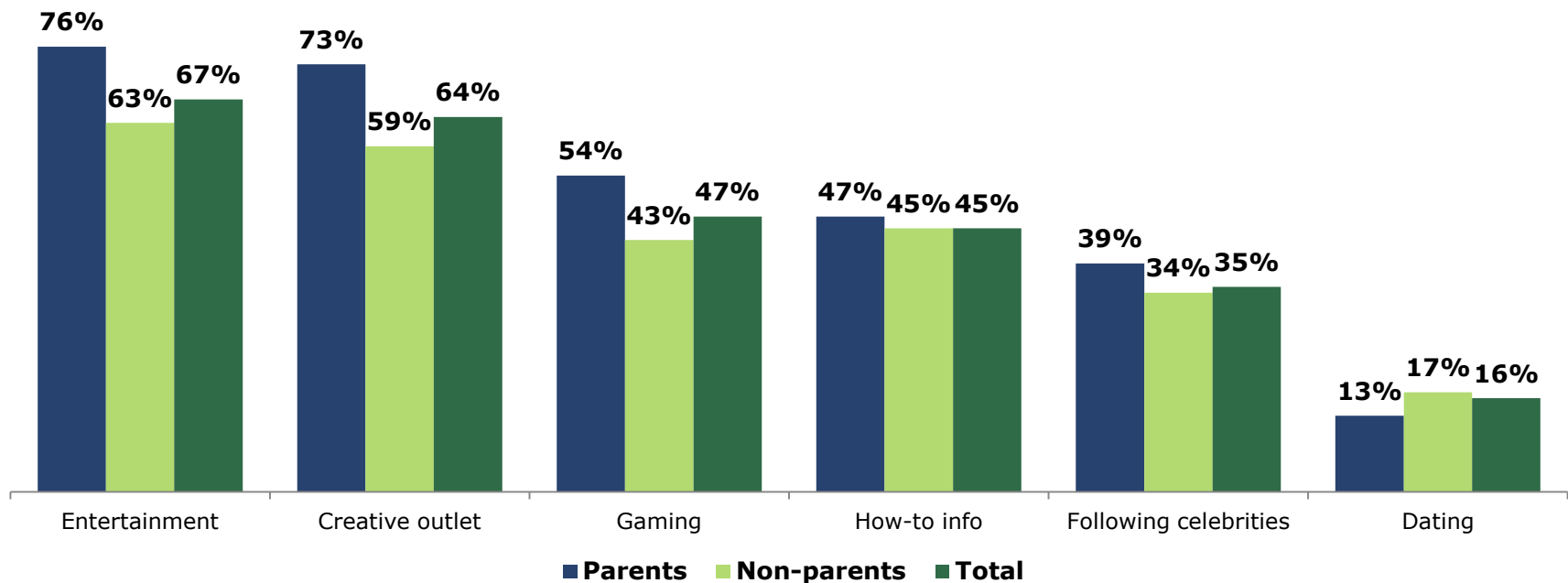
7 in 10 Parents Seek Some LOLs

Social Media Use for Lifestyle/Entertainment Purposes

% of respondents, **October 2011**

Source: NM Incite

Adults are turning to social network sites for entertainment, creative outlets, gaming, gathering “how-to” info and following celebrities. Interestingly, only 16% of social networkers are there for dating.

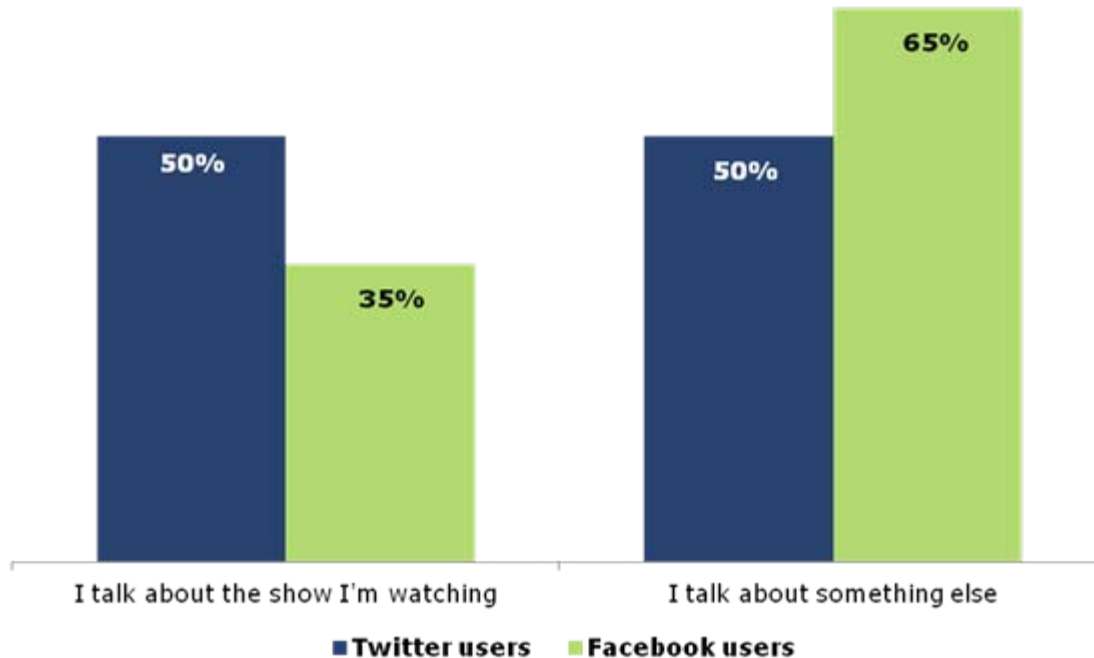


Half of Twitter Users Discuss TV Shows

Social Media Commentary while Watching TV

% of respondents, July 2011

Source: TVGuide.com



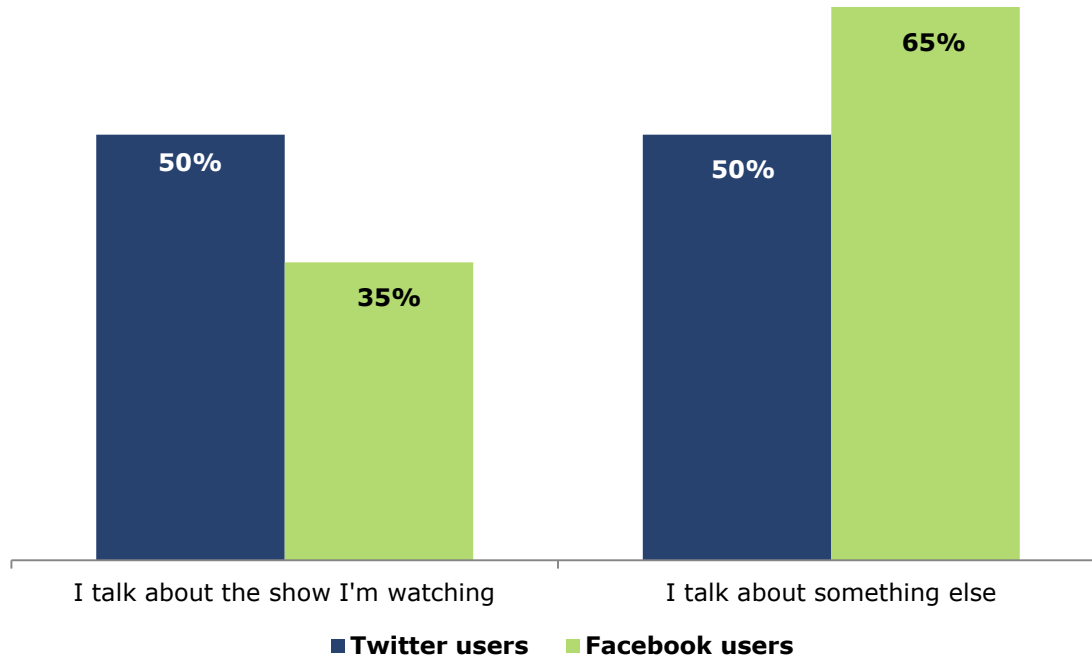
Social media networks, at the moment, still complement traditional TV viewing. A high percentage of Twitter users who tweet while watching a TV show [discuss the show they're watching](#), more often than Facebook users who log in during a TV show, [according to](#) TVGuide.com. The "TVGuide.com User Research Study" indicates 50% of Twitter users discuss a show they are watching, one-third more than the 35% of Facebook users.

Half of Viewers Tweet about TV Shows

Social Media Commentary while Watching TV

% of respondents, July 2011

Source: TVGuide.com



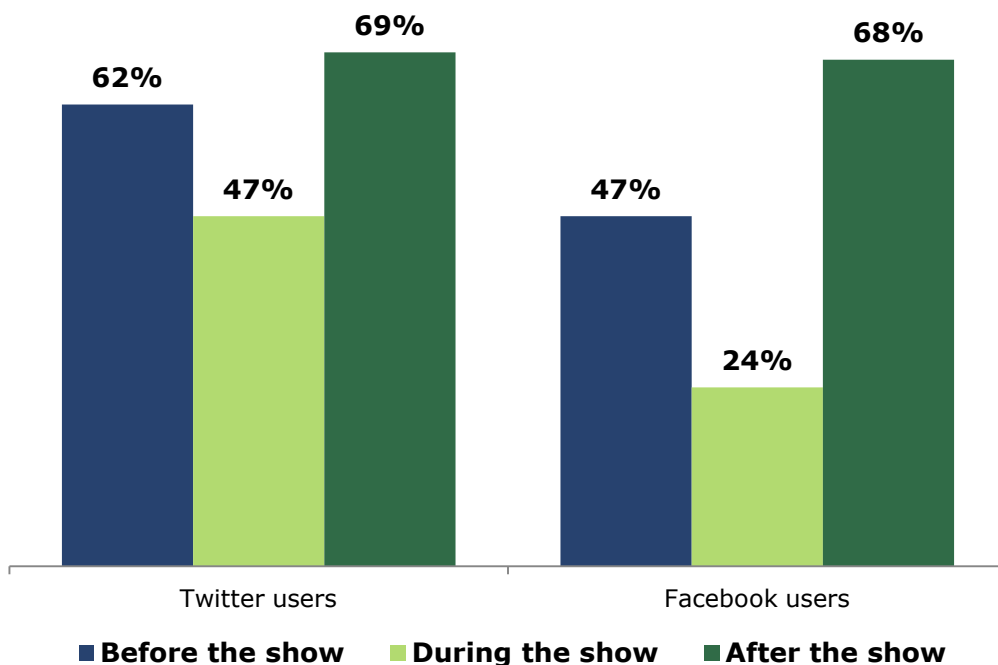
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Twitter Bursts Suit TV Discussions

Social Media Commentary about TV Programs

% of respondents, July 2011

Source: TVGuide.com



TVGuide found that social media users are more likely to talk about their favorite shows on Twitter and Facebook before and after the show airs rather than during the show.

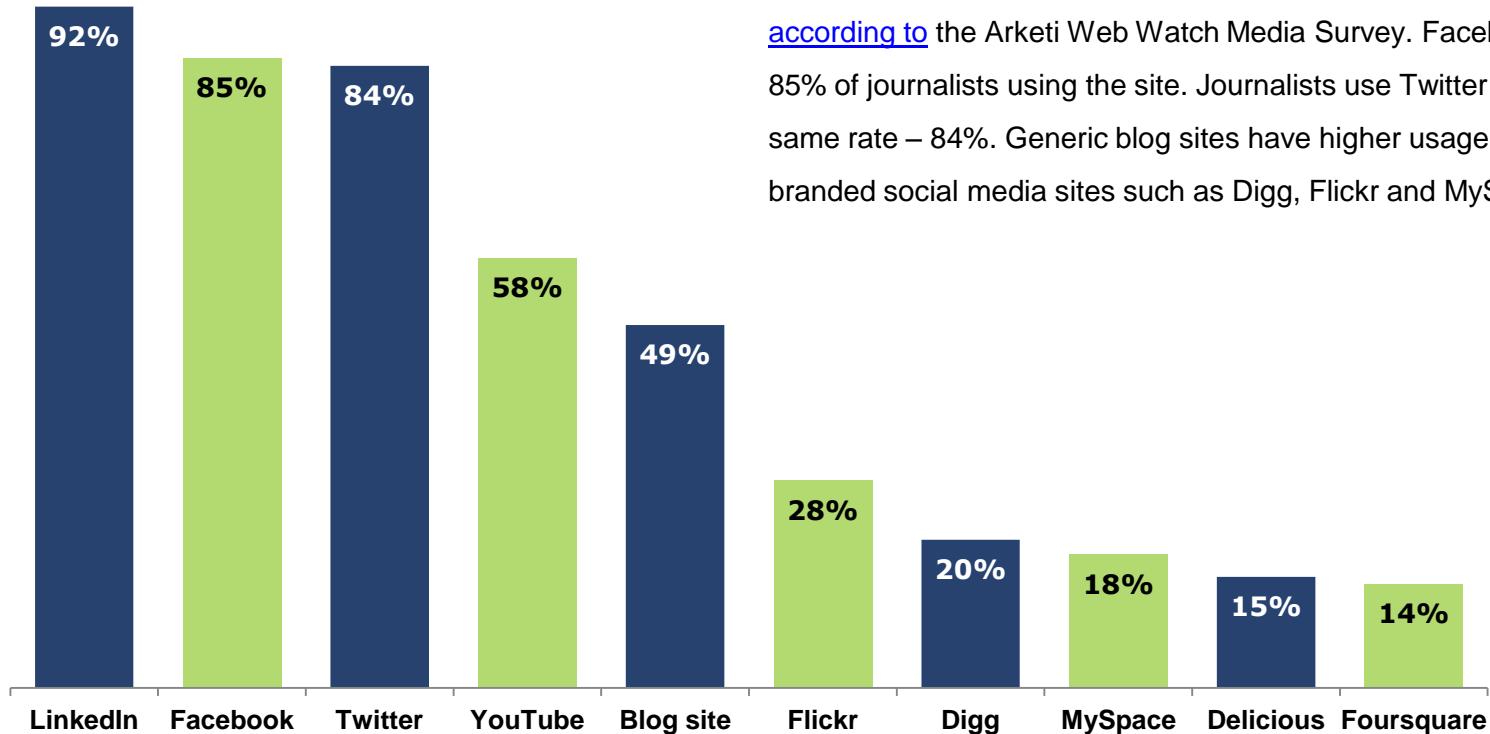
On Twitter, 62% said they engage before the show airs, 69% after, and 47% during. On Facebook, only 47% engage before the show airs (24% less than Twitter users), 68% after, and 24% during (almost 50% less).

LinkedIn Top Choice for Journalists

Social Media Use by Journalists

% of respondents, **August 2011**

Source: Arketi Web Watch



Twitter may have gotten a great deal of use during press coverage of world events, but it is LinkedIn is a top choice for some media professionals. 92% of business journalists have a LinkedIn account, [according to](#) the Arketi Web Watch Media Survey. Facebook follows with 85% of journalists using the site. Journalists use Twitter at almost the same rate – 84%. Generic blog sites have higher usage rates than branded social media sites such as Digg, Flickr and MySpace.



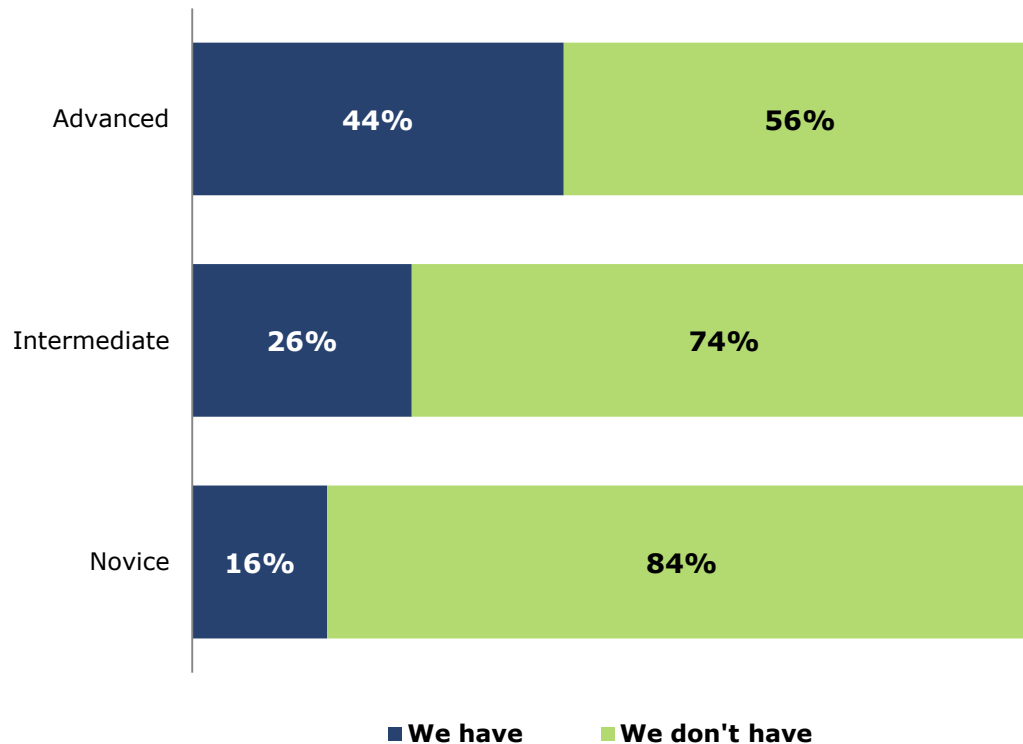
**COMPANIES
& SOCIAL
MEDIA
MARKETING**

Who is Measuring Social Media Value?

Use of Social Media Measurement Frameworks

% of respondents, August 2011

Source: Altimeter Group



Social media sites are wildly popular, but there are still no marketing rules carved in stone, and many companies grapple with measuring its value. A majority of companies do not have standard frameworks in place to measure the value of social media, according to “[A Framework for Social Analytics](#)” from Altimeter Group.

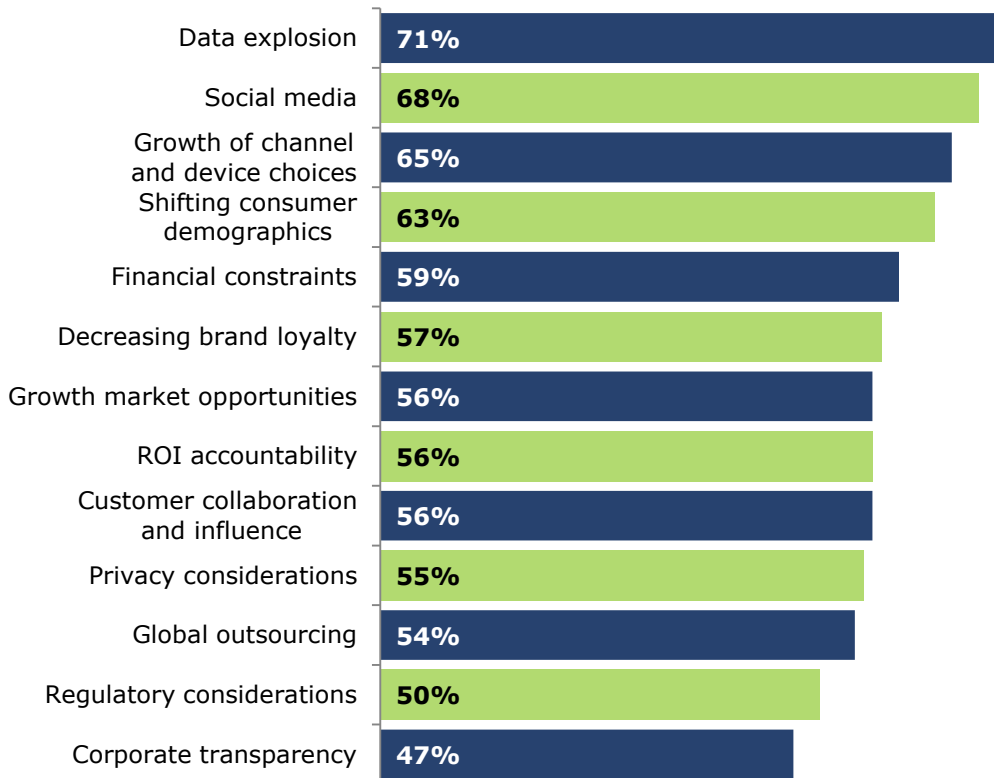
Only 44% of companies considered advanced in their integration of social media, as well as 26% of intermediate companies and 16% of novice companies, agree they have standard measurement frameworks to help benchmark social media deployments.

68% of CMOs Challenged by Social Media

Marketing Challenges Reported by CMOs

% of respondents, **October 2011**

Source: IBM



Nearly seven in 10 (68%) global chief marketing officers (CMOs) [feel unprepared for the demands](#) of social media marketing, [according to](#) a study released by IBM. This is second only to the 71% who are challenged by the so-called marketing “data explosion.”

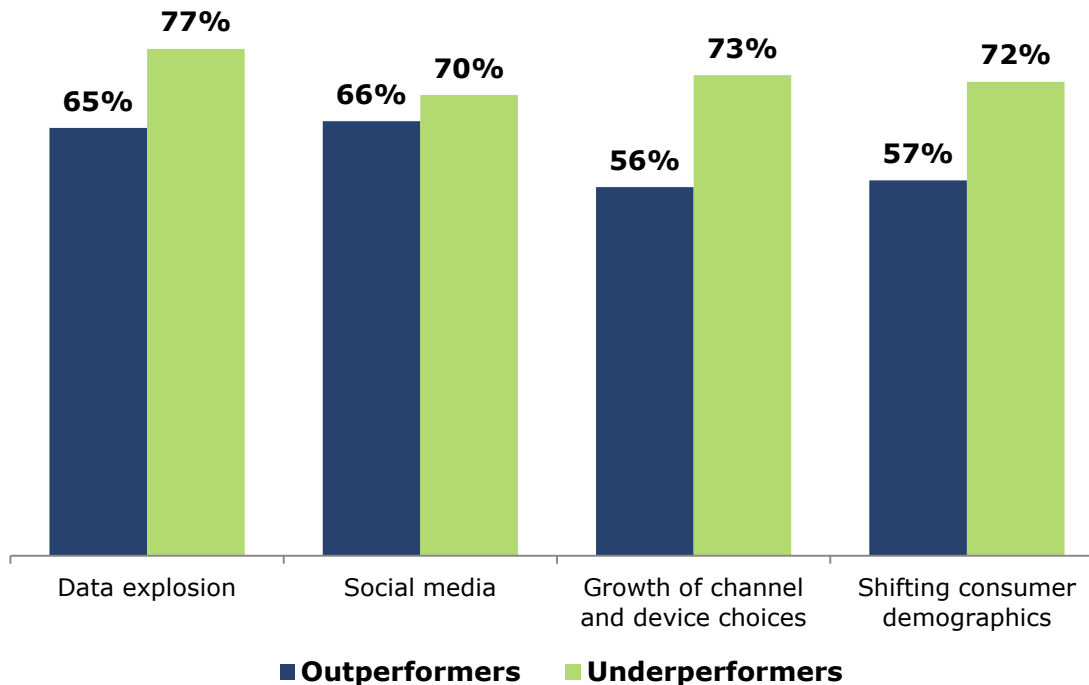
A large portion of CMOs also feel unprepared for growth of channel and device choices (65%), shifting consumer demographics (63%) and financial constraints (59%).

Top Performing CMOs Not Too Far Ahead

Marketing "Unpreparedness" by Performance

% of respondents who reported "unpreparedness, **October 2011**

Source: IBM



The IBM study found that even when respondents were divided into outperforming and underperforming segments, large percentages of outperformers still feel unprepared for many developing trends.

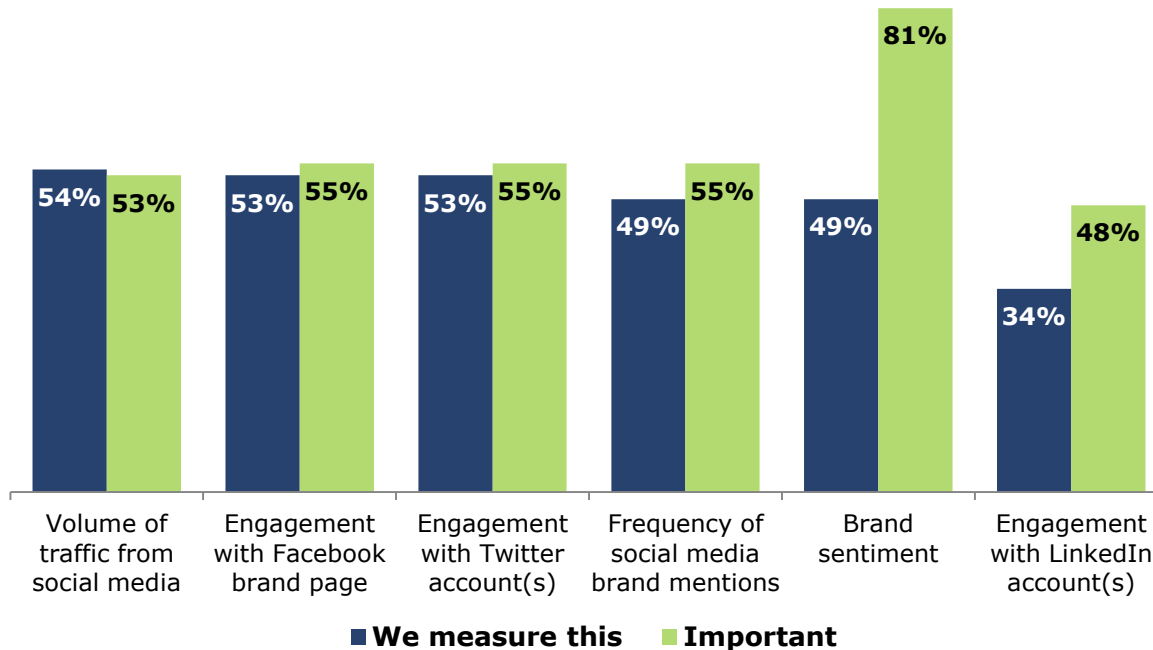
Regarding social media, 66% of the best performing organizations feel unprepared for social media marketing, and 70% of the underperforming companies reported being unprepared.

Brand Sentiment Valued, not Measured

Social Media Measurements

(% of respondents, July 2011)

Source: Adobe and Econsultancy



More than half (54%) of North American marketers measure the [traffic volume](#) generated by social media, according to research from Adobe and Econsultancy. A similar 53% also measure engagement with their Facebook brand page and Twitter accounts.

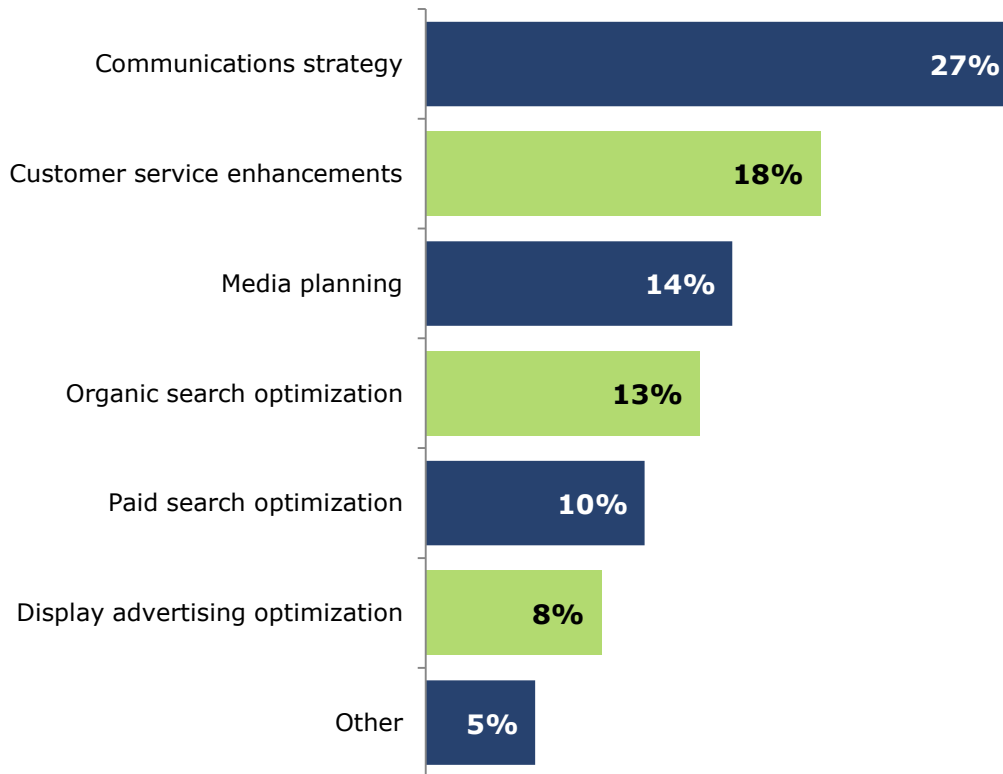
Brand sentiment was ranked high in perceived importance (81%), but in terms of a current practice, only 49% measure it. Slightly fewer marketers think social media traffic volume is important (53%) than currently measure it.

Social Media Data Feeds Strategy

Actionable Uses of Social Media Data

% of respondents, August 2011

Source: WebLiquid and RSW/US



Almost 30% of senior marketing executives engaging in social media monitoring incorporate the information into their communications strategy, [according to](#) data from WebLiquid and RSW/US.

Customer service enhancements – ranging from automated search engine alerts to specific data queries and third-party research – followed at close to 20%.

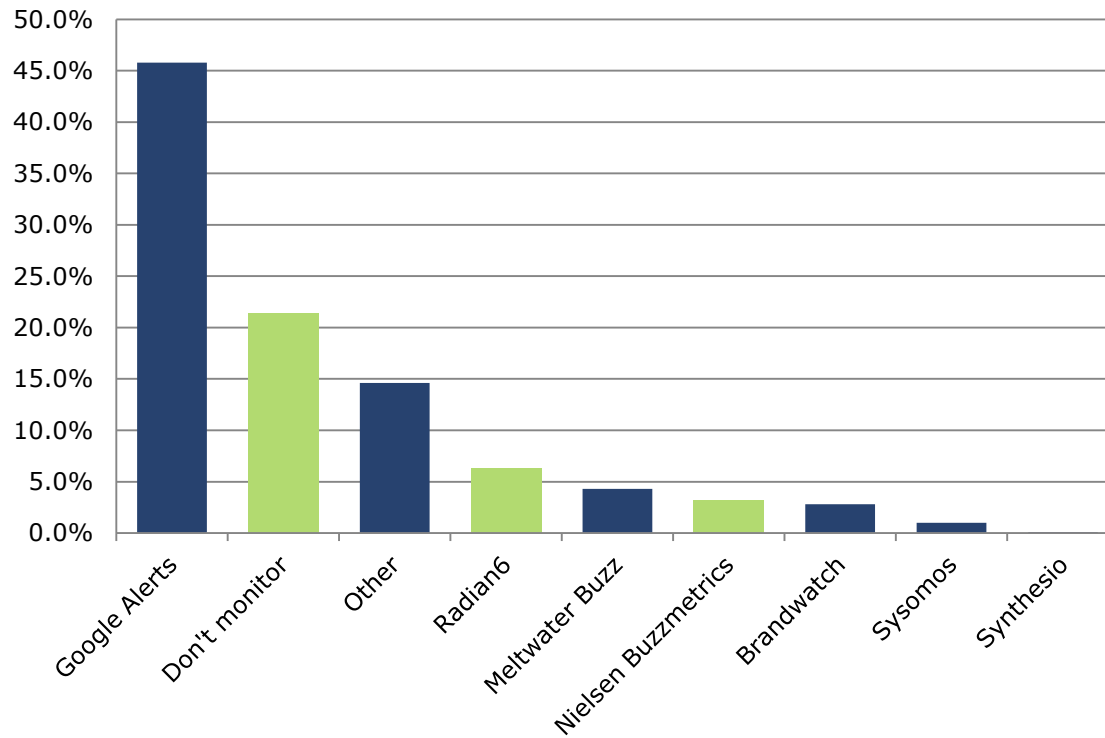
Other relatively popular answers include media planning (almost 15%) and organic search optimization (more than 10%).

Google Alerts is Tool of Choice

Popular Social Media Monitoring Tools

% of respondents, August 2011

Source: WebLiquid and RSW/US



Senior marketing executives in the WebLiquid survey named Google Alerts as [the most popular social media monitoring tool](#) among survey respondents, with slightly more than 45% reported usage.

“Not monitoring social media” was the second most-popular response.

SocNets Ads Lag Behind Other Formats

Consumer Actions by Ad Type

% who reported action in past six months, **August 2011**

Source: Internet Advertising Bureau

Action	Total	Video ad	Email ad	Search ad/ Sponsored	Web/ Banner ad	Social media ad	Mobile ad
Done any action	59	41	37	41	37	28	17
Clicked on ad	45	26	22	27	23	15	7
Visited advertiser's site	38	22	19	19	17	12	8
Search for more product/service info	28	16	13	12	11	8	6
Became fan on a socnet	18	10	4	3	4	12	4
Went to retail location to see/purchase	17	10	7	5	5	6	5
Purchased online	16	9	7	4	4	5	4
Shared ad via email, Twitter, socnet	11	5	5	3	3	5	4
Sent an email, text to advertiser	9	5	4	4	3	4	3
Called advertiser for more info	8	4	4	3	3	4	3

Social media advertising prompts consumers to become a fan on a social media network, but otherwise performs below most other types of digital ads, according to a study from the [Internet Advertising Bureau \(IAB\)](#).

For example, 41% of both video and search ad viewers have taken some type of action resulting from the ad in the past six months, while on 28% of social media ad viewers were inspired to act.

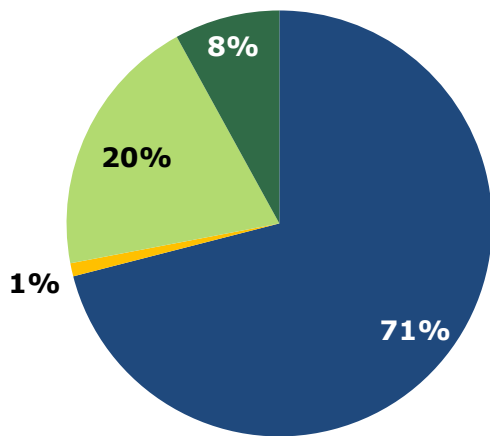
How are Marketing Budgets Affected?

Planned Use of SEO Marketing, Online Advertising

% of respondents who are actively social media marketing, April 2011

Source: SocialMedia Examiner

SEO Marketing



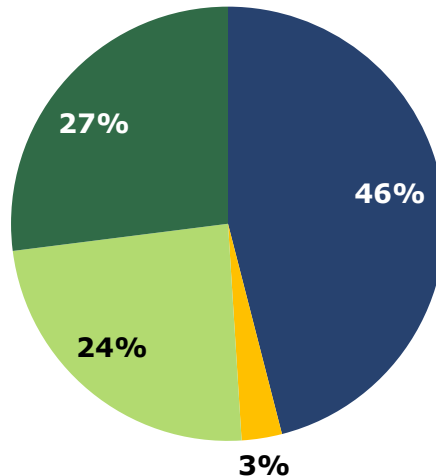
■ Increase

■ Decrease

■ Stay the same

■ No plans to utilize

Online Advertising



[SocialMedia Examiner](#) found that seven in 10 (71%) marketers who use social media plan to increase their use of search engine optimization (SEO) in the near future. Only 1% plan to decrease their use of SEO and 8% have no plans to utilize it.

Slightly less than half (46%) of social marketers plan on increasing their online advertising efforts, with 27% having no plans to utilize online advertising. 24% will keep online advertising levels the same and 3% will decrease them.

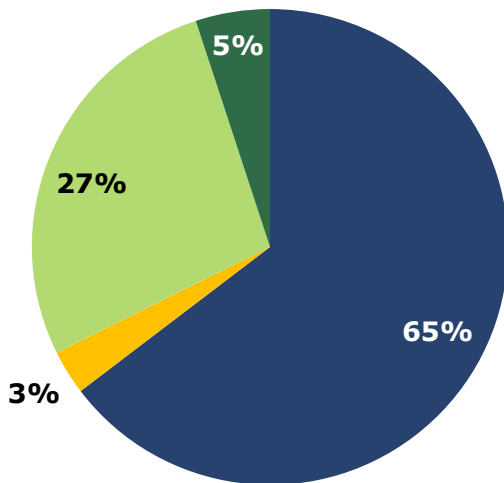
2 in 3 Will Increase Email Marketing

Planned Use of Email Marketing, Webinars

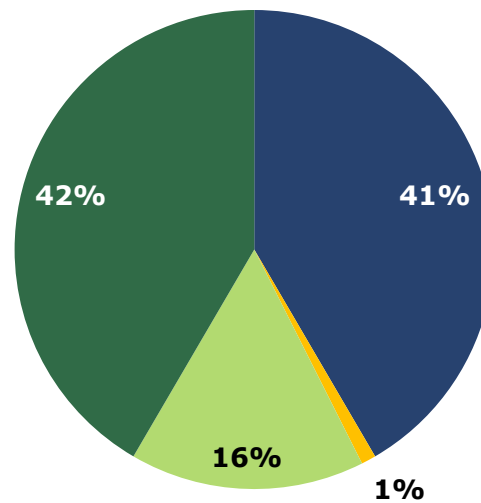
% of respondents who are actively social media marketing, April 2011

Source: SocialMedia Examiner

Email Marketing



Webinars



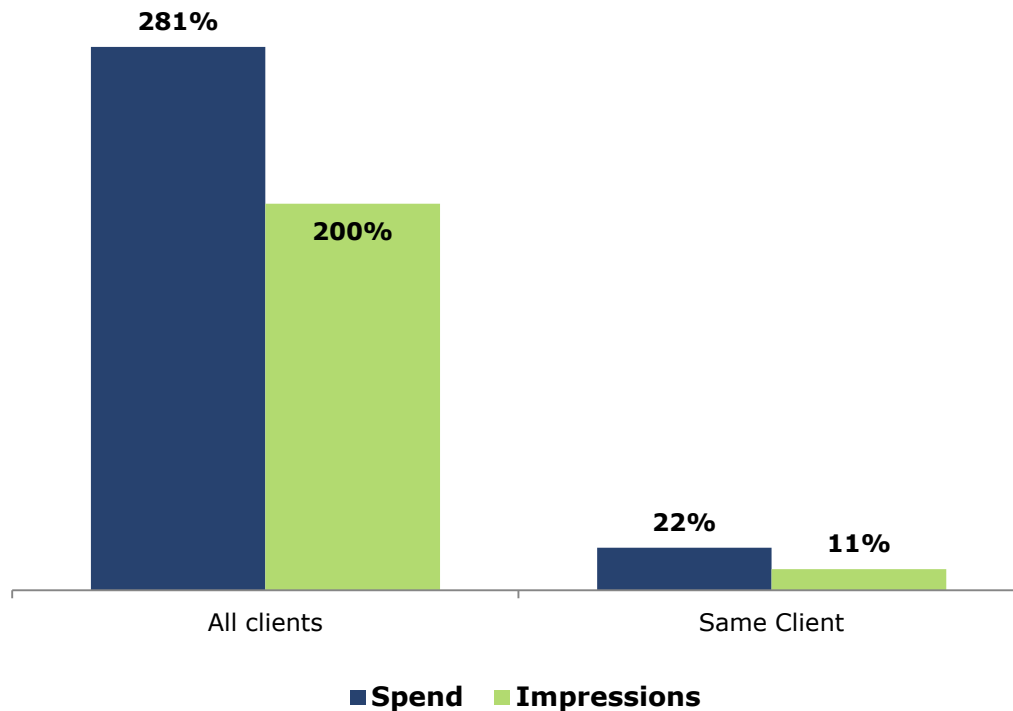
■ Increase ■ Decrease ■ Stay the same ■ No plans to utilize

Nearly two in three social marketers (64%) plan on increasing their email marketing efforts in the near future. Some, 3% percent, plan to decrease email usage, and 5% have no plans for email. 27% will keep its usage the same.

Four in 10 (42%) of social marketers have no plans to use webinars, with another 41% planning on increasing their use of these tools and 16% keeping their usage the same; it would seem that many businesses are not yet sold on the idea of virtual events.

Facebook: 281% Ad Spend Growth

Facebook Advertising Growth
% change, Q2 2010 v. Q2 2011
Source: IgnitionOne



Looking at ad growth on Facebook, spending on and impressions of Facebook ads both increased dramatically between Q2 2010 and Q2 2011, [according to](#) IgnitionOne. Facebook ad spend of all clients increased 281% year-over-year in Q2, while Facebook ad impressions of all clients grew 200%.

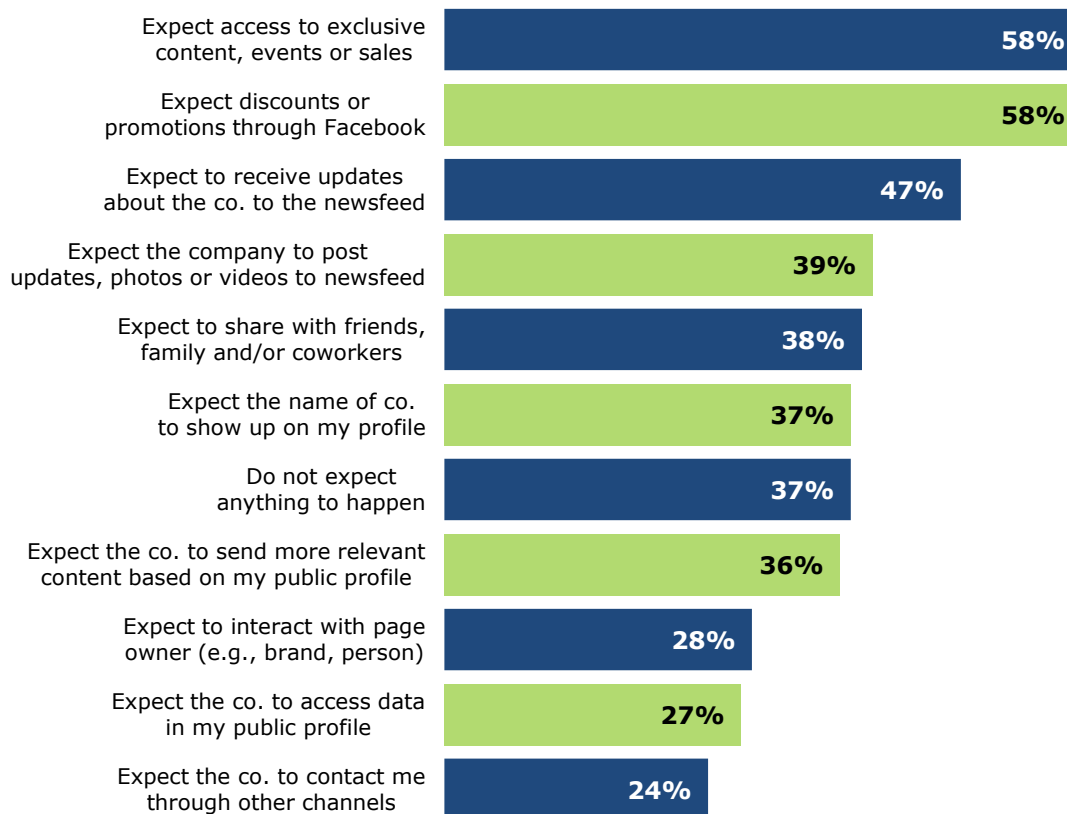
Facebook advertising spend is up 22% YOY on a same-client-basis, with impressions up 11%.

Consumers Expect Something for “Like”

Consumer Expectations for Brand Liking

% of Facebook users, **September 2011**

Source: ExactTarget



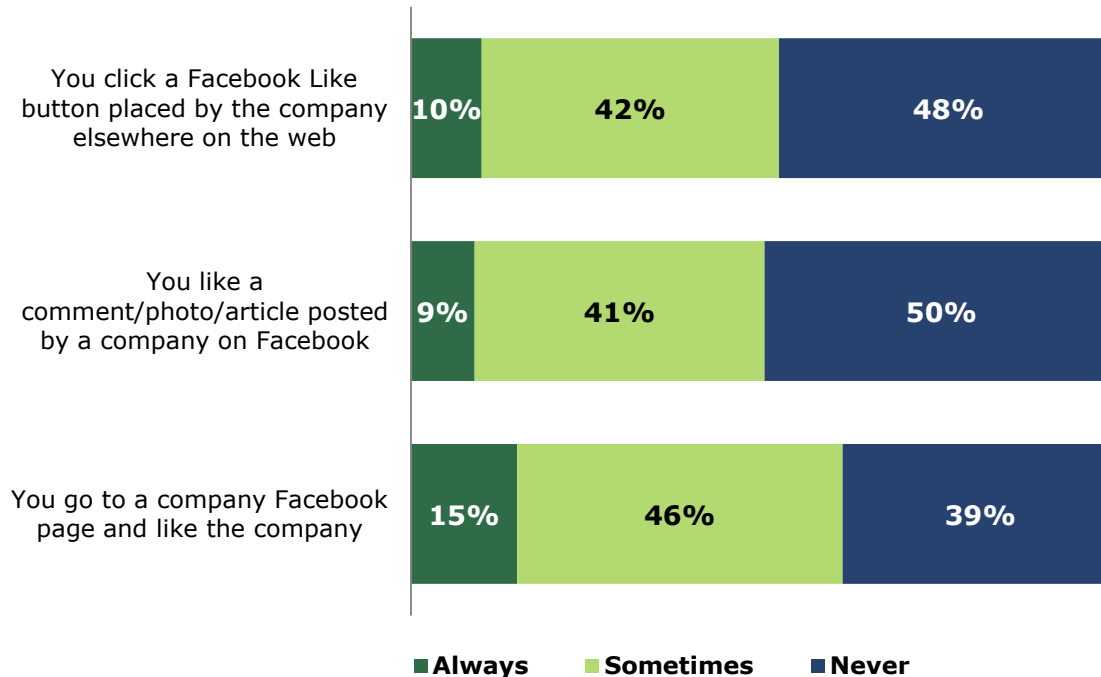
ExactTarget [reports](#) that more than six in 10 (63%) Facebook users who “like” a brand or product on Facebook expect something in return. Results from “The Meaning of Like” indicate that a leading 58% of Facebook likers expect both access to exclusive content, events or sales, and discounts or promotions through Facebook. Only 37% do not expect anything to happen.

Consumers React to “Like” Marketing

What Constitutes Permission to Market on Facebook?

% of respondents, July 2011

Source: ExactTarget



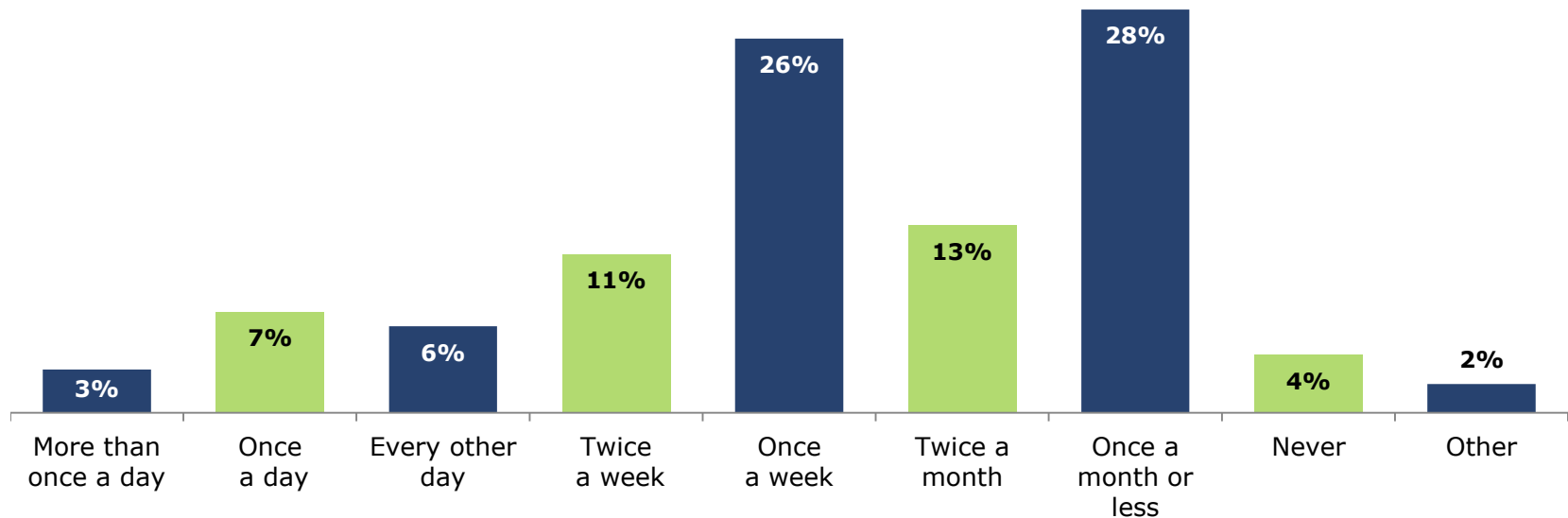
The ExactTarget survey found that the highest percentage of respondents, a rather low 15%, “always” expected a marketing initiative after liking a company at its Facebook page source, but that dropped to 10% for a click on a “Like” button elsewhere on the web.

Only 9% always expect marketing after logging a reaction to Facebook content.

1 in 4 Expect Weekly or Monthly Updates

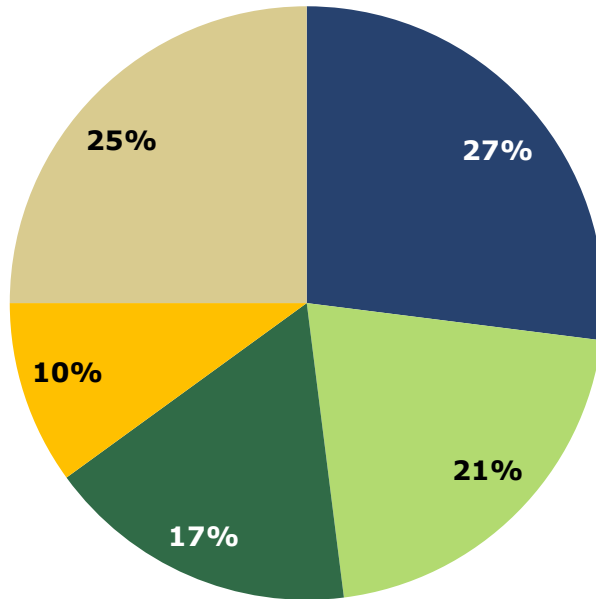
Marketing Contact via Social Networks
% of respondents (n=2,997) **June 2011**
Source: ROI Research and Performics

The highest percentages of online consumers say products, services and companies should communicate via social networks once a month or less and once a week or less, [according to](#) a study from ROI Research and Performics. 28% of online consumers say social network communication should be conducted once a month or less, while 26% say once a week or less.



27% of User Time is Spent on Newsfeed

How Users Spend Time on Facebook
% of total engagement, **September 2011**
Source: comScore



■ Homepage/Newsfeed ■ Profiles ■ Photos ■ Apps & Tools ■ All Other

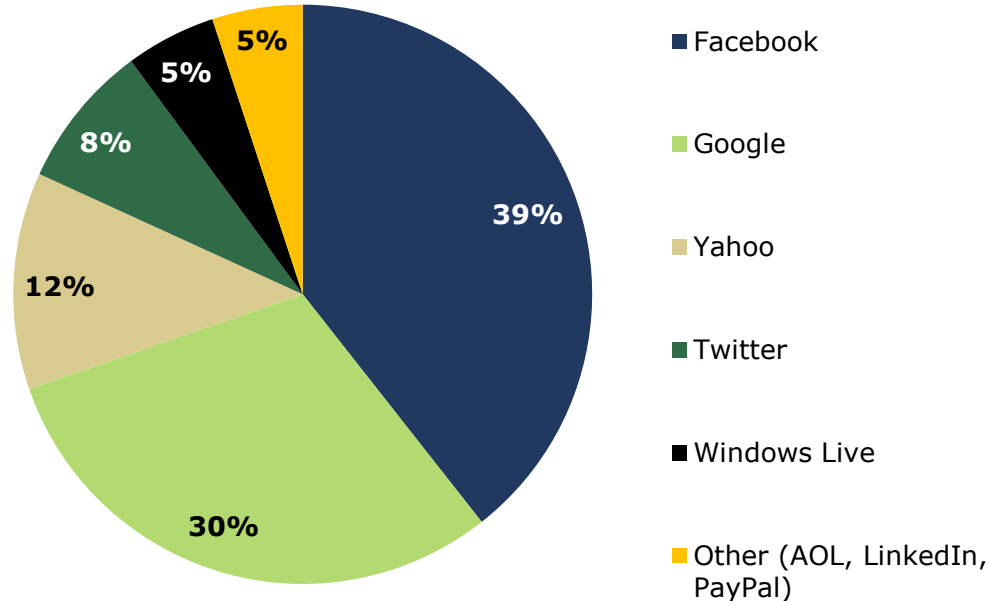
comScore [research](#) found that the largest portion of U.S. users' time spent within Facebook is on the individual's homepage which features the newsfeed. In May 2011, 27% of engagement on Facebook.com occurred on the homepage and Newsfeed, followed by profile viewing (21%), photo viewing (17%) and usage of apps and tools (10%).

4 in 10 Use Facebook for Social Sign-in

Social Sign-in Preferences across Web

% of users, Q2 2011

Source: Janrain



Social sign-in is another growing activity among social media users. SSI allows users to sign into a restricted access site using existing sign-in data, rather than having to create a new account.

About [four in 10](#) (39%) users of the Janrain Engage social connection service used Facebook for social sign-in (SSI) during Q2 2011. This was 30% more than the 30% of users who used number two SSI site Google.

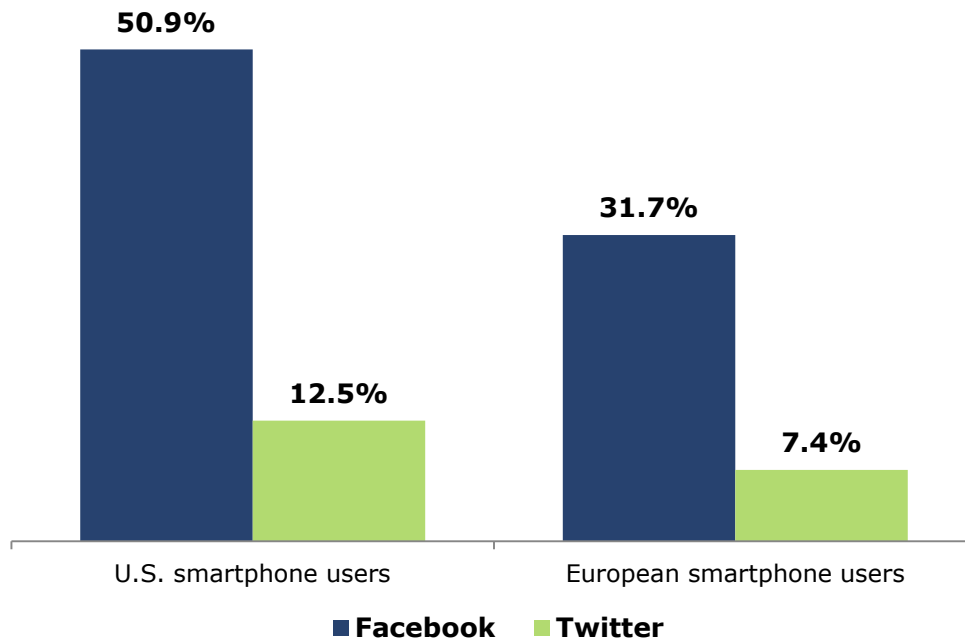
Yahoo (12%) and Twitter (8%) remain well behind in third and fourth place, respectively.

51% Access Facebook via Mobile

Facebook, Twitter Reach among Smartphone Users

3-month average, ending **June 2011**

Source: Experian Hitwise



According to comScore analysis, Facebook and Twitter brands have developed [a growing mobile audience](#). On average, slightly more than half of U.S. smartphone owners (50.9%) and 31.7% of European smartphone owners accessed Facebook on their device in the three-month period ending June 2011.

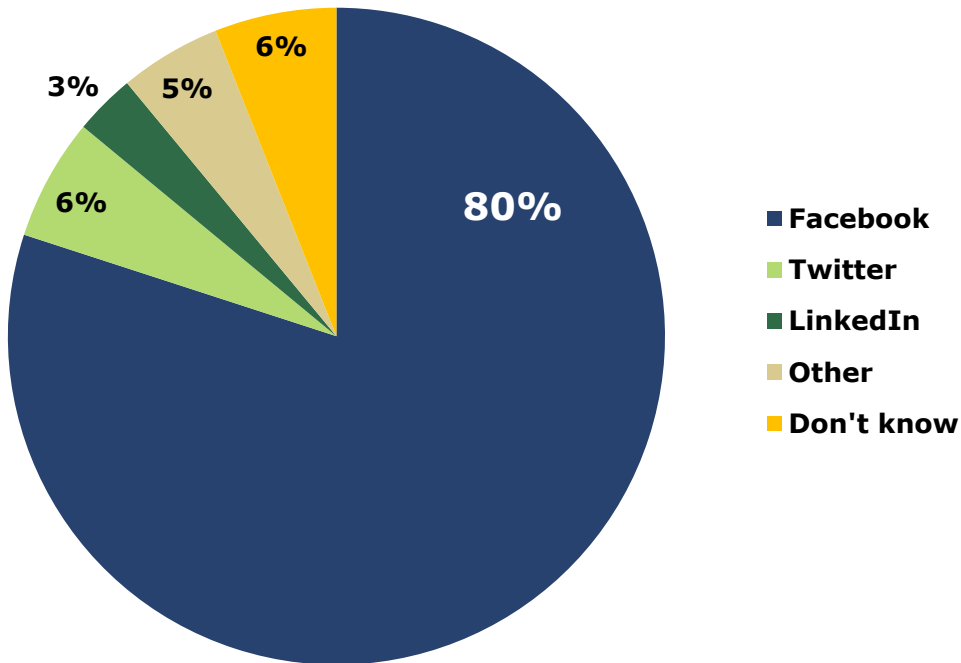
Meanwhile, Twitter reached 12.5% of the smartphone audience in the US and 7.4% of the European smartphone audience.

8 in 10 Connect to Brands on Facebook

Preferred Social Network for Brand Connection

% of social network users, **May 2011**

Source: Edison Research and Arbitron



Edison Research and Arbitron

[found that](#) 80% of US social network users preferred to connect with brands through Facebook.

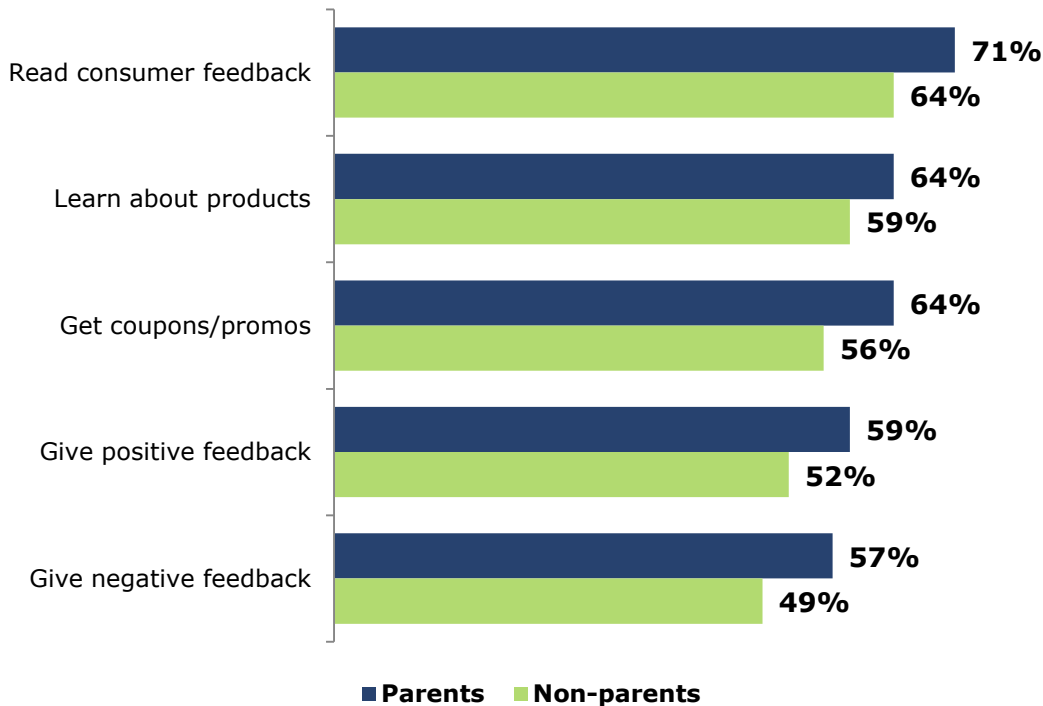
This dwarfs all other social media networks, with Twitter in a tie with “Don’t Know” for a very distant second place, at 6% of users.

SocNet Users Want Deals, Discussion

Social Media Use for Products/Services Information

% of respondents, **October 2011**

Source: NM Incite



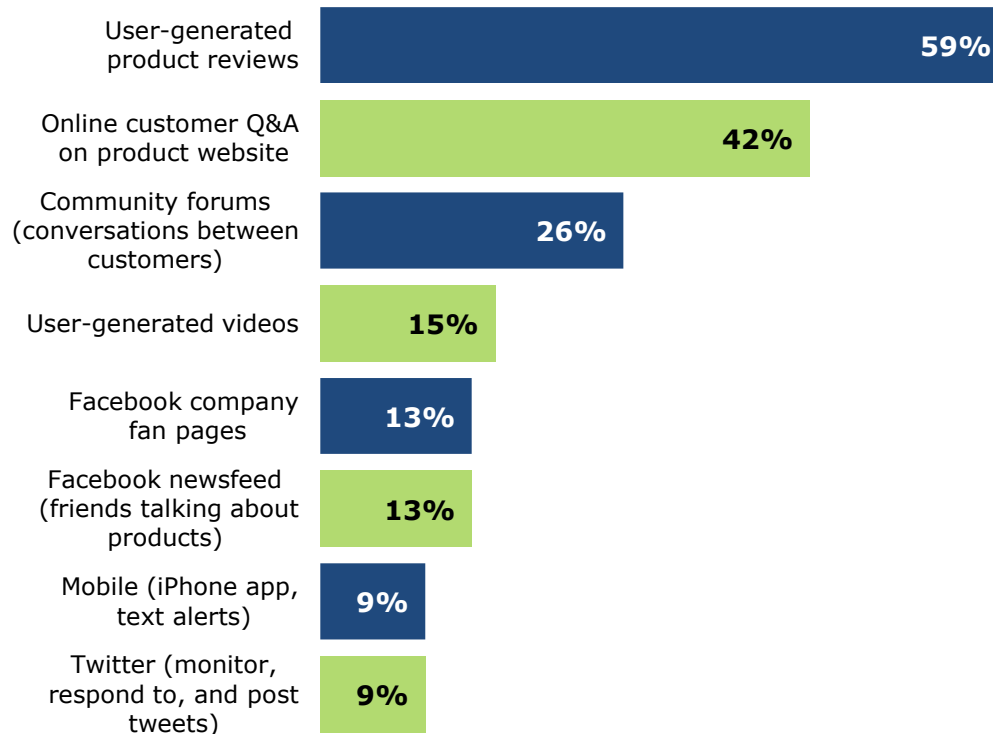
NM Incite found that social network users see the platforms as a useful shopping and research tool, and participate with the [desire to view and contribute to reviews of products and services](#). 68% of social media users (71% of parents and 64% of non-parents) go to social networking sites to read product reviews and more than half use these sites to provide product feedback, both positive and negative. Getting coupons is also popular, with 58% overall usage (64% of parents and 56% of non-parents).

Social Sites Impact 35% of Shoppers

Community, Social Tools that Impact Buying

% of respondents, **June 2011**

Source: e-tailing group, PowerReviews



About six in 10 (59%) online shoppers say user-generated customer product reviews have a significant or good impact on their buying behavior, [according to](#) the e-tailing group and PowerReviews.

Community forums influence 26% of shoppers. The social media sites, altogether, influence the buying behavior of 35% of online shoppers: Facebook fan pages affect 13% of online shoppers; the Facebook newsfeed influences another 13% and Twitter, another 9%.

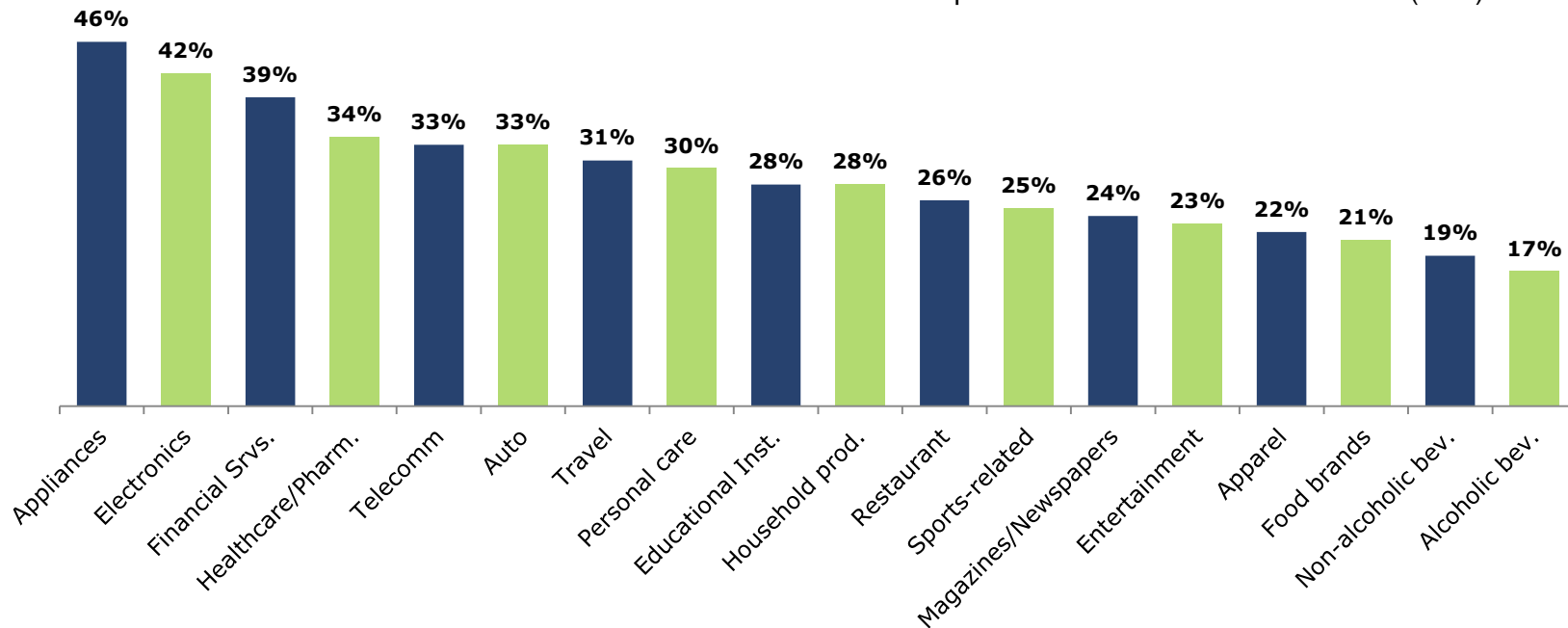
On Average, 29% Seek Purchase Advice

Social Networks as a Source of Purchasing Advice

% of respondents who sought advice, **June 2011**

Source: ROI Research and Performics

Social networks are a resource, with an average of 29% of consumers seeking buying advice. Less than half of online consumers obtain purchase advice on products in any vertical covered by the survey, with [appliances the most popular at 46%](#). The only other vertical which more than four in 10 online consumers said they go to social networks to receive purchase advice for was electronics (42%).

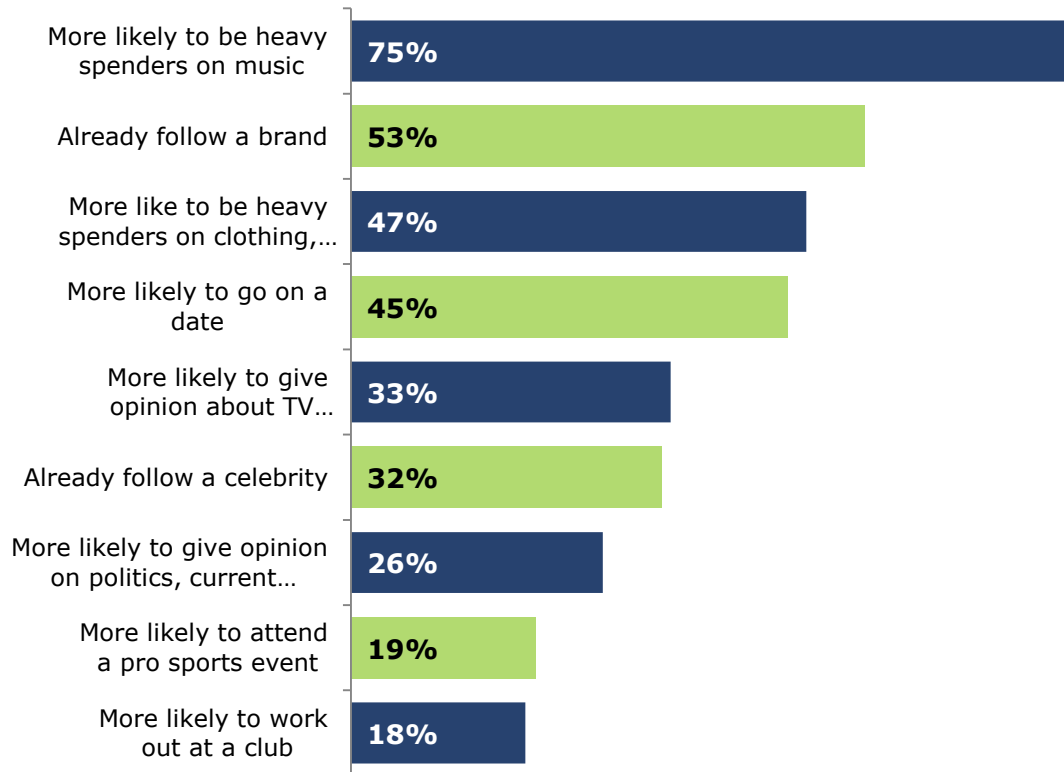


Active SocNet Users Take It Offline

Lifestyle Habits of Active Social Network Users

% of total, compared to average internet users, Q3 2011

Source: The Nielsen Company



[Active social network users](#), according to Nielsen, are 75% more likely to spend heavily on music and 47% more likely to heavily spend on clothing, shoes and accessories. They are 45% more likely to go on a date. Other areas where heavy social network users show more likelihood of participating include giving opinions on TV programs (33%), giving opinions on politics and current events (26%), attending professional sporting events (19%) and working out at a gym or health club (18%).

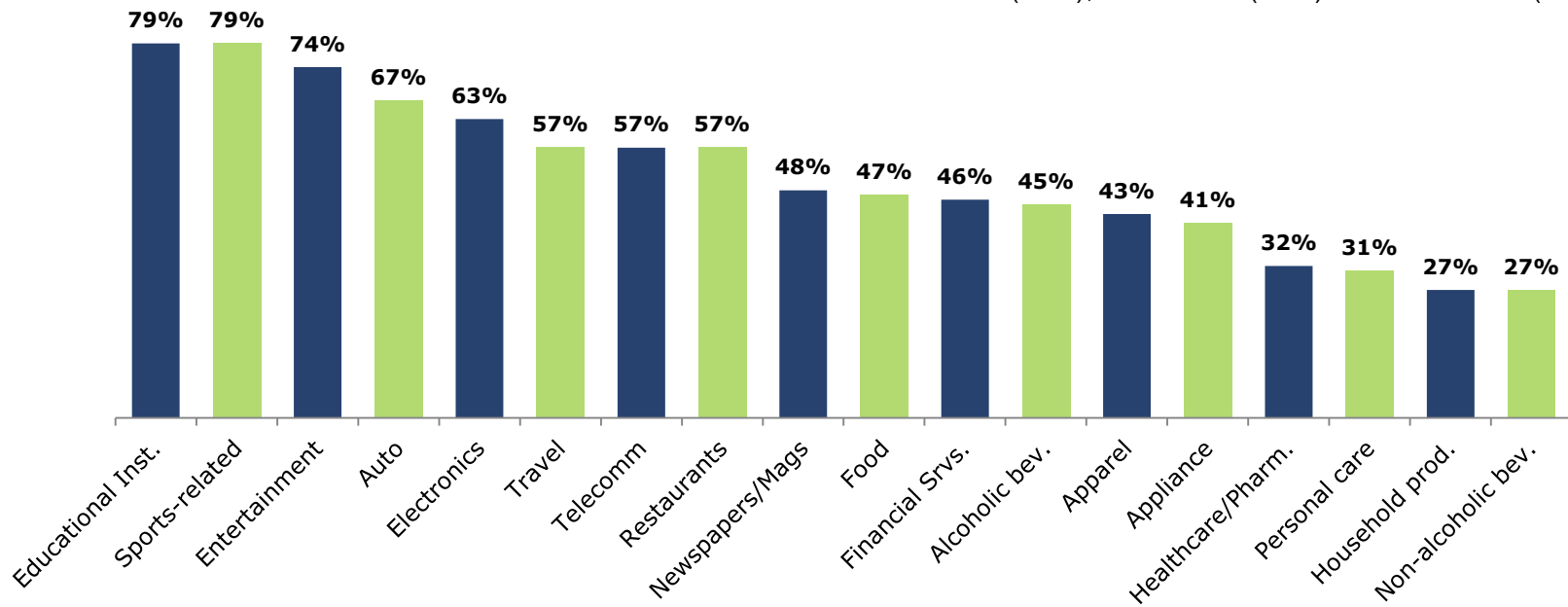
Sports, Education Lead Discussions

Product Discussion via Social Networks

% of respondents who had discussion in vertical **June 2011**

Source: ROI Research and Performics

The ROI research survey asked [consumers about their discussions](#) on a variety of vertical products on social networks. About eight in 10 (79%) online consumers indicated they discuss educational institutions and sports-related products. Other verticals generating social network discussions with a high rate of consumers include entertainment (74%), automotive (67%) and electronics (63%).





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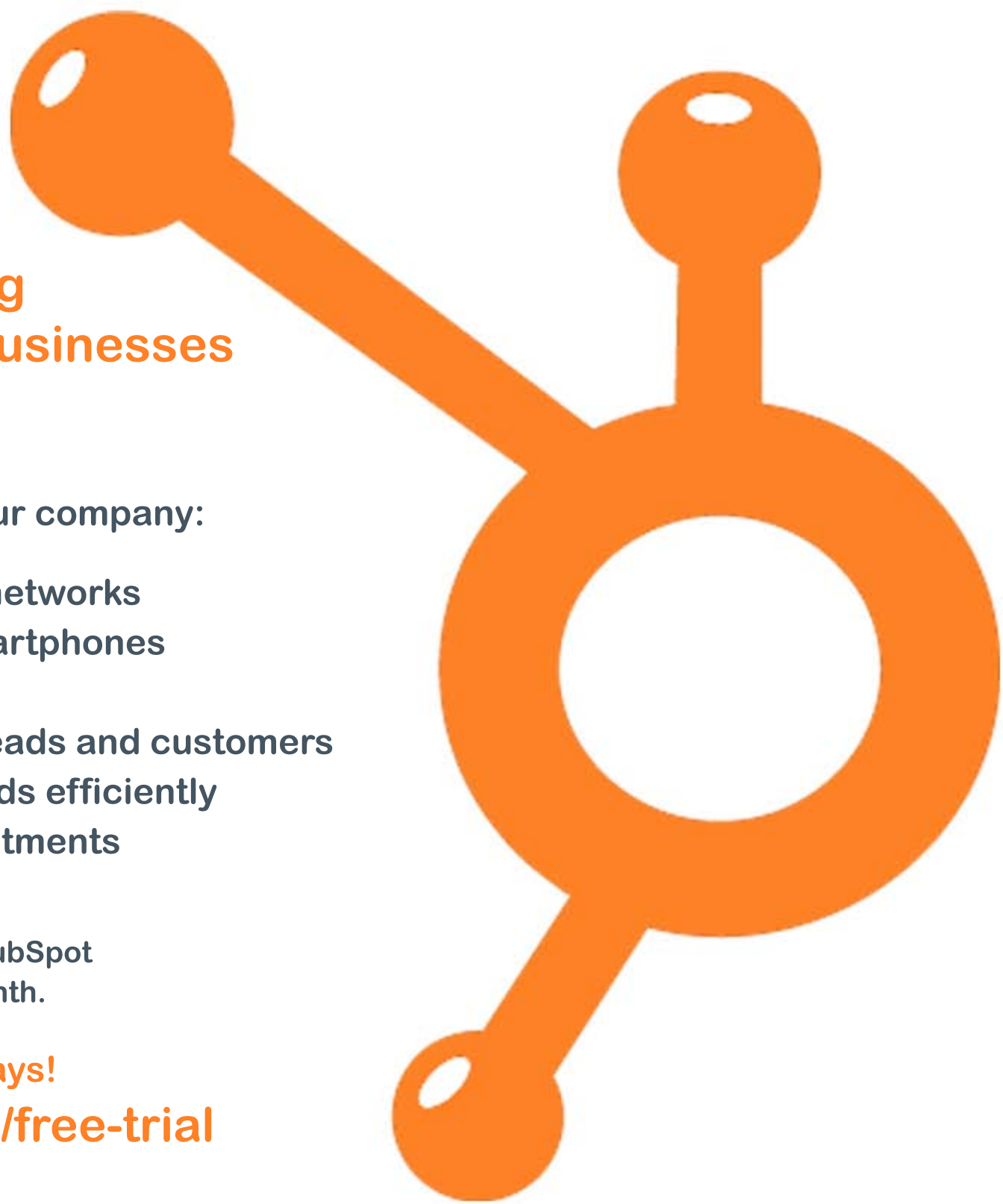
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