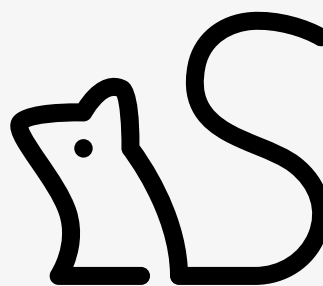


Sensis Social Media Report May 2015


How Australian people
and businesses are
using social media




sensis

www.sensis.com.au/socialmediareport

Join the conversation:

 @Sensis #SensisSocial

 [linkedin.com/company/sensis](https://www.linkedin.com/company/sensis)

Foreword

As consumers become increasingly fragmented in how they engage with both traditional and social media, it is apparent businesses must quickly adapt their presence online to establish and nurture new communities and connect with them in authentic ways.

The Sensis Social Media Report, now in its fifth year, provides not just a view on past trends, but dives into how consumers and businesses are engaging with social channels. The report maps out the rapid changes that are taking place online. It is a vital tool for all business owners, whether they are looking to establish their online presence or improve their existing profile.

In this latest edition of the report we find that slightly fewer Australian internet users were active on social media this year. However, this didn't stop an increase in the amount of time people spent on sites such as Facebook, LinkedIn and Instagram. In fact, Facebook users now spend the equivalent of a full working day on Facebook each week, averaging 8.5 hours on the site. This insight is important for businesses seeking the best return for their online advertising spend.

Ratings and reviews should be a major focus for businesses online. They can play an important role in increasing customer satisfaction and retention, with 62% of people open to changing their opinion of a business if it responds to negative feedback on social media.

Please enjoy the 2015 edition of the Sensis Social Media Report and we look forward to discussing our insights with you online at #SensisSocial.

Evan Ravensdale
General Manager, Digital
Sensis

The Sensis Social Media Report this year is again showing increased levels of engagement with social media as a critical way in which the public, business and government are communicating. Almost 50% of consumers now access social media every day (and up to 79% for the 18-29 age group), yet only 31% of SME businesses actively operate a social media engagement strategy.

Facebook continues to stand out as the predominant social media platform, but strong growth in Instagram, Snapchat and LinkedIn this year is showing a diversity of social engagement across multiple platforms. This added complexity means it's even more important for businesses to understand social media opportunities as more and more consumer attention is absorbed across social compared to other media.

Importantly also, this year's report continues to show more social media activity away from the home in places such as at work, in transit and even at restaurants and cafes. This highlights the even greater opportunities for businesses to engage through social media at critical buying moments.

There is a wealth of information contained in this important report to assist businesses to think about and develop a strong social media engagement strategy – but it will not all be about selling. It's important to work with social media industry professionals to develop a social media strategy and policy that is able to put the consumer at the centre of the brand relationship.

As the Digital Industry Association of Australia, we are very pleased to endorse and support this comprehensive snapshot of social media in Australia.

Rob Wong
Chief Executive Office
AIMIA – The digital industry Association of Australia



Executive summary

About this report

Sensis surveyed 800 Australian consumers and 1,100 Australian businesses to continue this landmark study 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, Google+, LinkedIn and Twitter.
- Online blogs and online rating and review mechanisms.

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

Australians continue to embrace technology through use of multiple internet enabled devices. The average Australian owns three such devices with laptops (75%), smartphones (70%) and tablets (55%) most prevalent.

The way we connect continues to evolve with social media still playing a significant role in many people’s lives. 68% of internet users have a social media profile and they mainly use it to catch up with friends and family. It’s becoming more prevalent in our daily lives as a majority (70%) are using their smartphone to access it (mainly through an app). Hence it is not surprising that the frequency of use is increasing - 24% check in more than 5 times a day which is up from 19% - but overall use appears to have plateaued as there has been no growth in social media use relative to last year when 69% had a social media profile.

Facebook continues to dominate the social media space, capturing 93% of users and they spend an average of eight and a half hours a week on the site. Quite a few have profiles on LinkedIn (28%), Instagram (26%) and Google+ (23%) with use of each platform continuing to grow.

Social media is a forum which is generally used for browsing and many consumers check in to keep their ‘finger on the pulse’, giving them a real time perspective of what is happening around them. This provides businesses with huge potential to engage and interact with the public.

From a commercial perspective, a solid minority of Australians who use this media follow brands and businesses (32%), access offers and promotions (20%) or conduct research about products and services they want to buy (19%) which means they are willing to engage. In fact, half of those who are using social media to research products and services said they made a purchase and two thirds of them made that purchase online.

Therefore, it remains paramount for businesses and marketers to establish a connection by engaging with them in a meaningful way if they want to capitalise on this opportunity. For example, stories about the brand or its product and services, shared in a compelling format (i.e. video or imagery) help to establish a positive connection and this is one of the major advantages of social media.

Tangible benefits also attract consumers like discounts, give-aways and coupons but some are also seeking event invitations, tips and advice or an opportunity to provide feedback.

Attitudes towards businesses advertising on social media remain mixed but there are still quite a few who like sponsored posts from businesses they follow (32%) or don’t mind seeing ads (38%) which they click on occasionally to find out more (42%). This suggests paid advertising or sponsorship is reasonably effective for targeting consumers of interest although it’s also likely to be ignored by many.

Blogs and reviews continue to influence buying decisions, with over half of social media users (55%) reading reviews before making a purchase, which is less prevalent than the past few years. Most who read reviews look at up to 5 before making a decision. However, there remains just over a quarter of online users who post blogs or reviews (27%) and their shared experiences can influence potential buyer’s decisions.

Executive summary

Australian businesses and social media

The uptake of social media by Australian businesses is still not as pronounced as for consumers. 33% of businesses have a social media presence compared with 68% of consumers which means more than twice as many consumers appear to be engaged with social media than businesses. This survey indicates no growth in the proportion of businesses who use social media relative to last year.

Nearly all businesses using social media have a Facebook profile and some are using Twitter and LinkedIn, however these platforms are more prevalent for medium and large business. Not many are using other platforms, although Instagram is becoming more popular for small and medium sized enterprises around 10% use it compared with 6% last year.

Around nine in ten manage their profiles internally rather than outsource this responsibility and it's mainly undertaken by the business owner in small businesses or the marketing department for medium or large businesses. Larger businesses tend to update their profiles more frequently than SMEs; most large businesses update daily, while many SMEs post at least once a week.

Most businesses are using these forums as a two way communication channel with key stakeholders and many are seeking feedback or comments then engaging with them about such comments. This appeals to consumers to some degree but they tend to be seeking tangible incentives like discounts or coupons. However not many businesses are offering these – only a quarter of SMEs and 30% of large businesses – which could be a missed opportunity.

Quite a few businesses using social media still lack knowledge and direction about how to use it and its effectiveness for the business:

- 49% of SMEs and 45% of large businesses say they have invested money in social media but don't know how much.
- Only 16% of SMEs and 29% of large businesses measure their return on investment in social media.
- 80% of SMEs and 37% of large businesses have not developed a strategic plan for their social media.

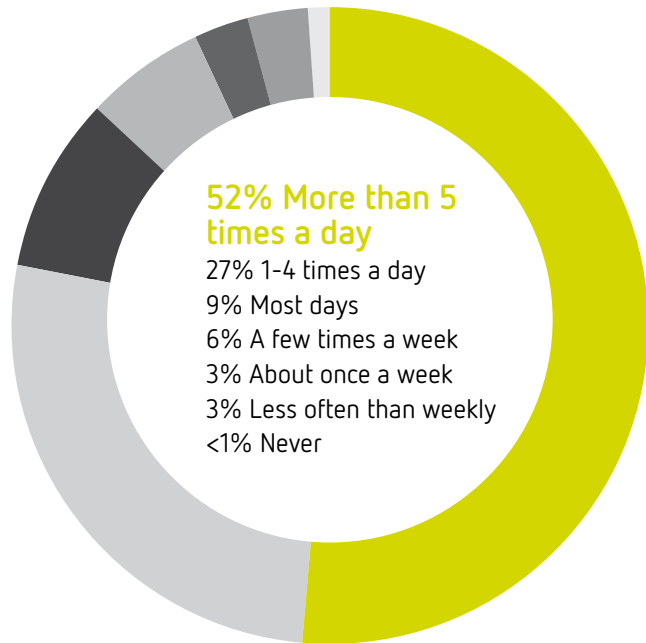
Nevertheless, most are seeking to drive traffic to their profiles by including links to social media on their website or by following other social media sites. Some businesses (25%) are trying to engage the public through paid advertising. The larger the business, the more likely they have advertised. Nearly all businesses who advertise on social media have placed an ad on Facebook. Despite the finding that many consumers will have ignored such advertising, 69% of businesses believe it has been effective.

Looking forward, it remains apparent that a social media presence is associated with more positive assessments of business performance. Those SMEs who have embraced social media were more confident about their business prospects and reported better sales, profitability and employment performance than those without a social media presence. They were also more likely to be seeking growth and many expect to spend either the same or more on social media in the coming year.

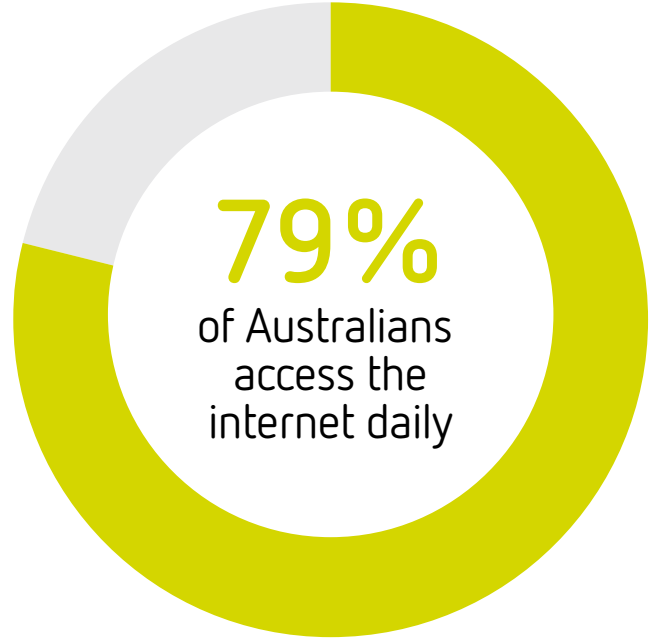
The social media space continues to offer real opportunities for businesses seeking to better engage with customers and potential customers however quite a few are missing out on this opportunity by not having any presence. Businesses using social media should have a strategy and invest the necessary time, money and resources implementing it and measuring its effectiveness to maximise the benefits for them and their stakeholders.

Report Snapshot

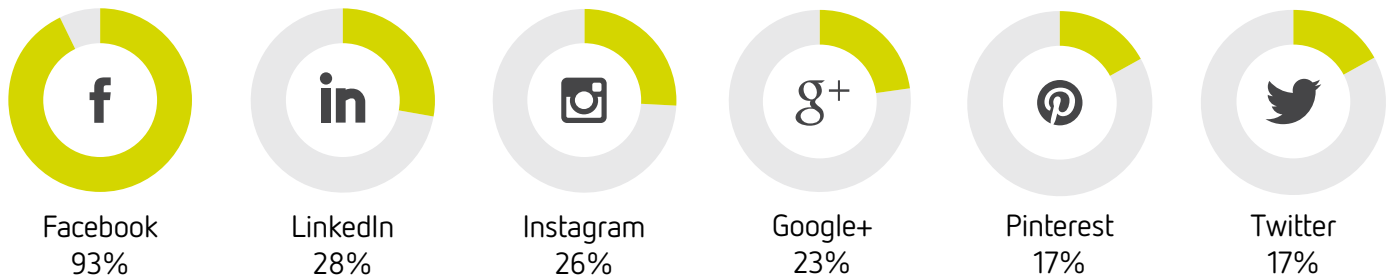
Frequency of internet use



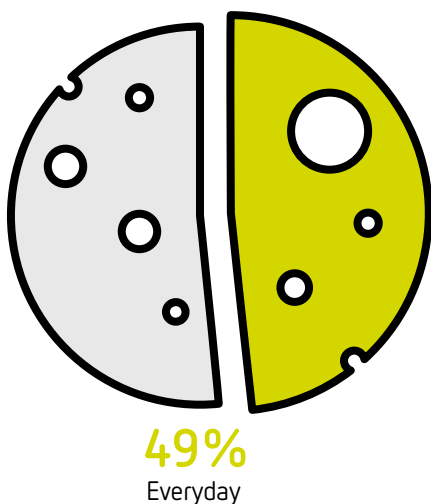
Proportion that access the internet daily



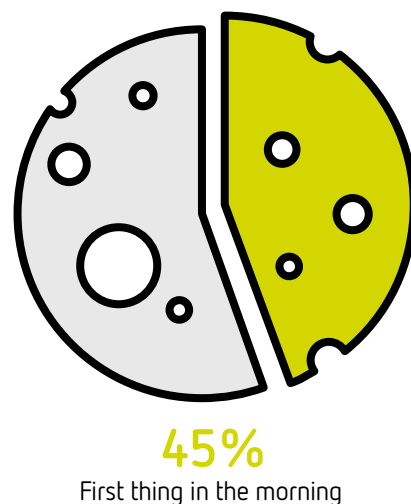
Social networking sites used this year



Frequency of using social networking sites



When we socially network



Report Snapshot

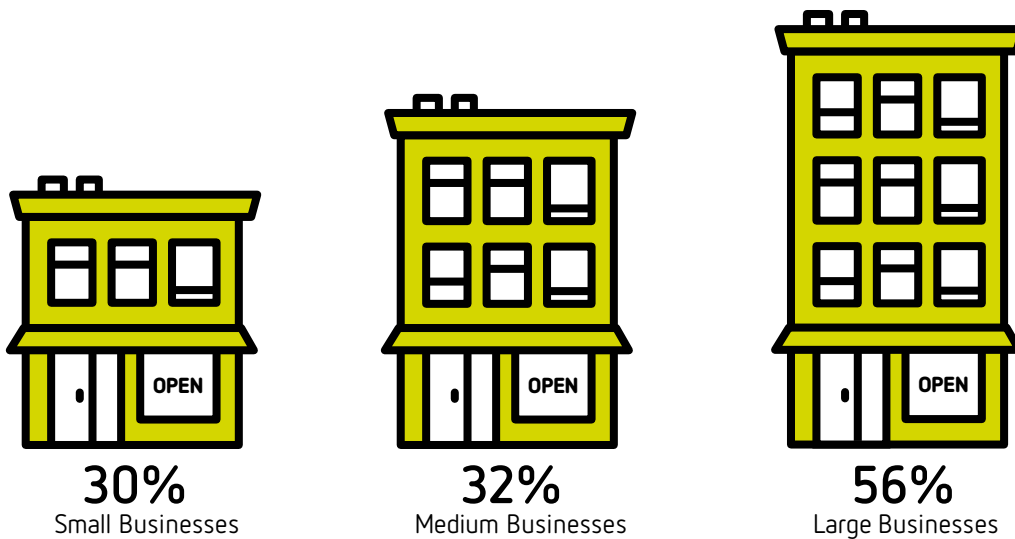
Where we socially network

72%	Lounge/living room
43%	Bedroom
35%	Study
24%	Kitchen
14%	Bathroom
14%	Toilet

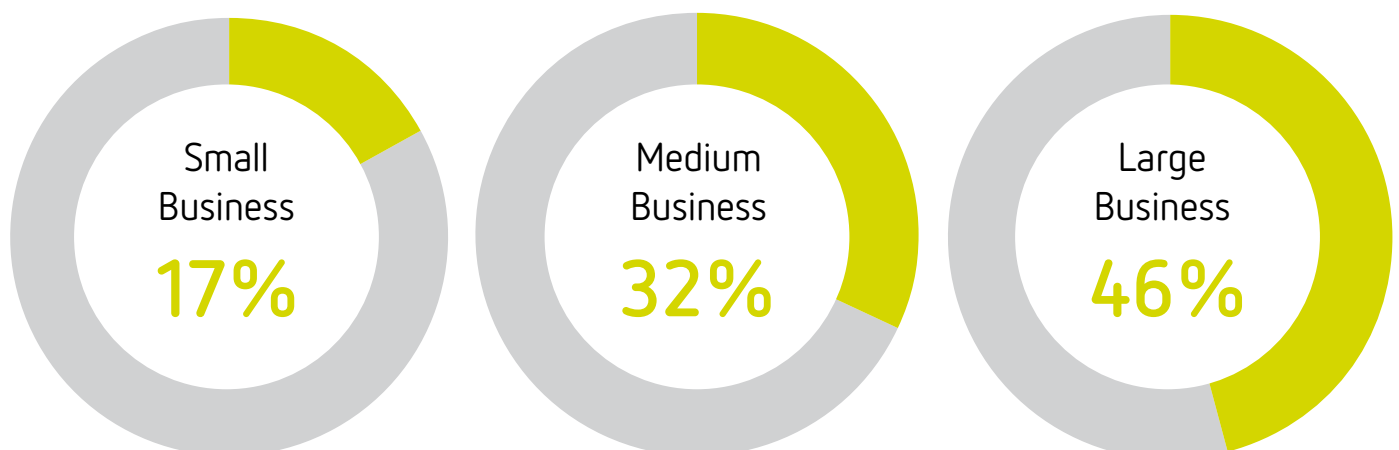
When we socially network

45%	First thing in the morning
20%	Commuting
32%	During work
27%	Breaks
23%	Lunchtime
40%	After work/in the evening
41%	Last thing before I go to bed

Proportion of businesses that have a social media presence



Proportion of businesses that paid to advertise on social media



Methodology

This report contains the results of research conducted by Di Marzio Research and AFS in March 2015.

Consumer survey

The research consisted of a telephone survey among 800 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 throughout March 2015. The data was weighted by age and gender within location so the results are reflective of the actual Australian population. Sample sizes by age and gender are shown below.

Sample size - consumer

State	Sample #
NSW	160
VIC	140
QLD	120
SA	100
WA	100
TAS	80
NT	50
ACT	50
Total	800

Gender	Sample #
Males	394
Females	406

Age	Sample #
18 to 29 years of age	160
30 to 39 years of age	160
40 to 49 years of age	160
50 to 64 years of age	160
65 plus years of age	160
Total	800

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 2015 Sensis Business Index. These findings are based on interviews with 1,000 SME proprietors and managers from across Australia. However, quotas are applied on business size, business type and location to ensure the sample is reflective of the actual business population across Australia. Interviews were conducted in the period 2 March to 9 April 2015.

The findings for large business (200+ employees) are based on a separate survey conducted among 100 marketing decision-makers in large businesses. Quotas were again applied to ensure an adequate representation across the various regions of Australia. Interviewing for this survey was conducted in March 2015. The sample distribution is shown in the table below.

2015 Sample size – business

Number of employees	Sample #
1 to 2 employees	337
3 to 4 employees	137
5 to 9 employees	177
10 to 19 employees	142
Total small businesses	793
20 to 99 employees	187
100 to 199 employees	20
Total medium businesses	207
200 to 999 employees	89
1000+ employees	11
Total large businesses	100
Grand total	1100

Industry – small and medium businesses	Sample #
Manufacturing	120
Building/construction	151
Wholesale trade	88
Retail trade	149
Transport and storage	80
Communication, property and business services	131
Finance and insurance	68
Health and community services	86
Cultural, recreational and personal services	69
Hospitality (Accommodation, cafes and restaurants)	58
Grand total (not including large business)	1000

Methodology

It needs to be noted the number of interviews conducted this year was reduced. In previous years, a total of 1,950 interviews were conducted, comprising of 1,800 SMEs and 150 large businesses. As a point of comparison, the 2014 sample is shown below.

2014 Sample size – business

Number of employees	Sample #
1 to 2 employees	601
3 to 4 employees	267
5 to 9 employees	308
10 to 19 employees	271
Total small businesses	1447
20 to 99 employees	315
100 to 199 employees	38
Total medium businesses	353
200 to 999 employees	97
1000+ employees	53
Total large business	150
Grand total	1950

Industry – small and medium businesses	Sample #
Manufacturing	228
Building/construction	275
Wholesale trade	146
Retail trade	278
Transport and storage	123
Communication, property and business services	249
Finance and insurance	99
Health and community services	150
Cultural, recreational and personal services	107
Accommodation, cafes and restaurants	145
Grand total (not including large business)	1800

The 2015 sample (of 1,100) is still a very good one for addressing the objectives of the survey effectively. However, an important difference between the 2014 and 2015 samples is that in the large business base, only 11% this year were firms with 1000+ employees whereas in 2014 it was 35%. This may explain any differences observed in results for that segment relative to 2014.

Section 1:

The general public and social media

Device ownership.....	10
Internet access.....	11
Social networking site usage.....	13
Social networking site usage by age, gender and location.....	14
Social media usage by time of day.....	15
Reasons for not using social media.....	16
Social networking sites used.....	18
Social networking sites we've stopped using.....	20
Frequency of using social networking sites.....	21
Time spent on social networking sites.....	22
Users' views on time spent on social networking.....	23
Number of friends, contacts or followers.....	24
Number of Twitter accounts followed.....	26
Devices and applications used to access social media.....	27
Where are social networking sites used?.....	29
TV and social networking.....	31
Reasons for using social networking sites.....	33
Types of products or services researched on social networking sites.....	35
Path to purchase.....	36
Social media and brands.....	38
What do consumers want from businesses or brands they follow?.....	39
Advertising on social networking sites.....	41
Provision of online ratings.....	42
Use of online reviews or blogs.....	44
Posting of online reviews or blogs.....	45

Device ownership

On average, Australians own three internet enabled devices with laptops and smartphones the two most popular. Tablets and desktops are also common while a solid minority own internet enabled TVs or an iPod touch.

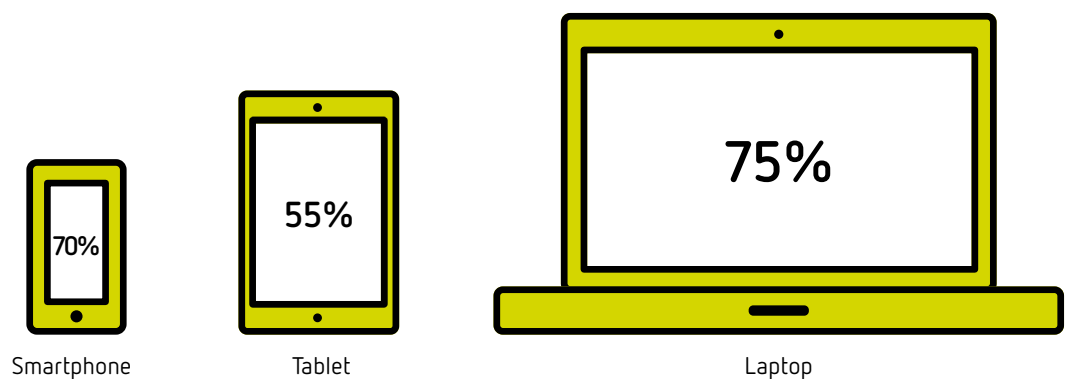
Some differences are apparent by gender, age and location:

- Distinctly more males than females own desktops and internet enabled TVs.
- A higher proportion of ACT residents own each of the devices while ownership is below average in NT for most of the devices.
- Smartphones are much more common in the under 50s than 50+ plus age groups while desktops are more prevalent in the 30+ age groups than among 18-29s. The 65+ age group is below average in owning devices other than desktops.

Device ownership	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Laptop	75%	74%	77%	81%	77%	75%	80%	60%
Smartphone	70%	73%	68%	89%	89%	85%	60%	29%
iPad or other tablet	55%	54%	56%	49%	72%	54%	58%	41%
Desktop	52%	62%	43%	41%	55%	59%	52%	58%
Internet-enabled TV	25%	30%	20%	24%	38%	28%	23%	14%
iPod touch or similar	22%	24%	20%	19%	28%	31%	22%	10%
None of the above	1%	1%	1%	<1%	1%	1%	<1%	1%

Device ownership	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Laptop	75%	78%	76%	73%	77%	66%	78%	67%	89%	75%	75%
Smartphone	70%	72%	68%	68%	76%	64%	86%	83%	89%	73%	66%
iPad or other tablet	55%	60%	55%	57%	47%	44%	43%	35%	68%	55%	54%
Desktop	52%	53%	51%	52%	62%	50%	45%	37%	59%	55%	47%
Internet-enabled TV	25%	24%	31%	19%	28%	27%	24%	18%	34%	27%	22%
iPod touch or similar	22%	19%	24%	19%	28%	23%	23%	8%	39%	24%	19%
None of the above	1%	1%	-	-	1%	3%	3%	2%	-	<1%	1%

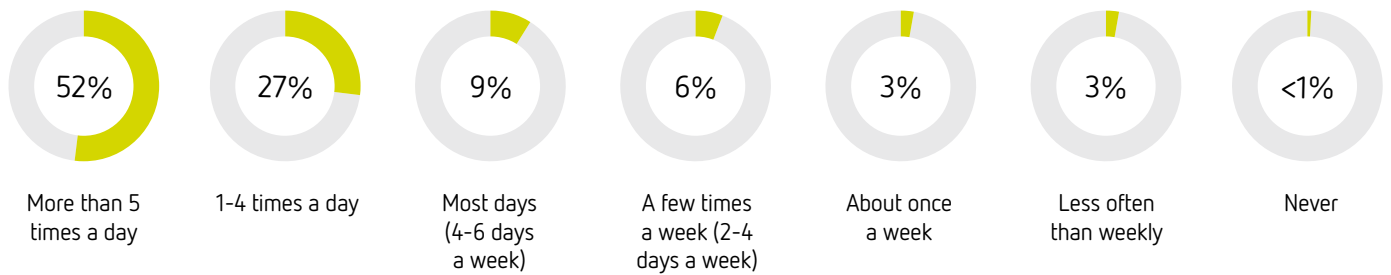
Base: All contacts (800)
 Q1a. Which of the following do you own?
 Note: <1% = less than 1%



Internet access

Internet usage is almost universal with less than 1% (4 people in the sample) saying they never access the internet. Over half access it more than 5 times a day and some eight in ten go online at least daily.

Frequency of internet use



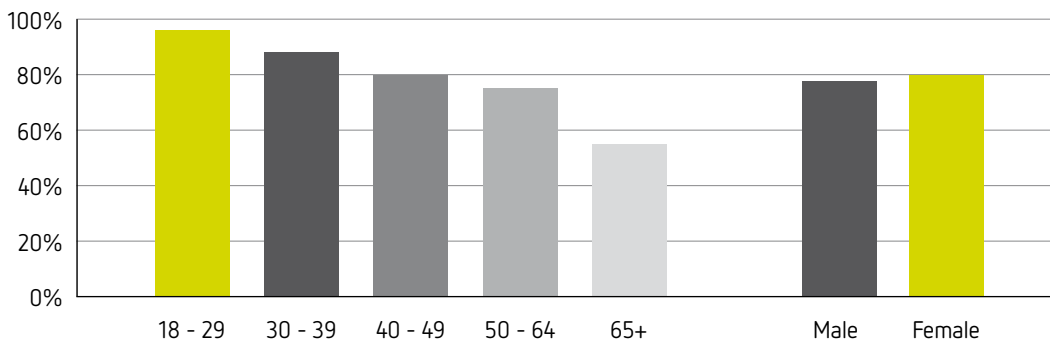
Base: All contacts (800)

Q1b. 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?

Notes: Rounding occurs; <1% = less than 1%

Frequency of internet use decreases with age but a majority of older Australians (aged 65+) do use the internet every day.

Proportion that access the internet daily



79%
of Australians
access the internet
daily

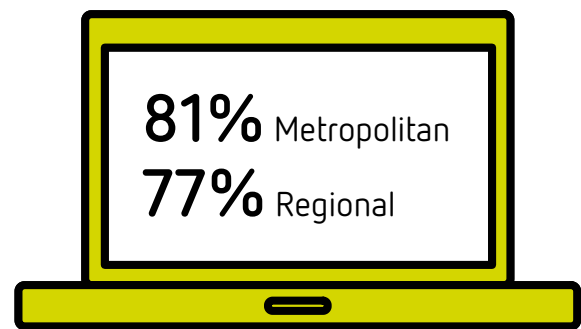


Internet access

Daily internet usage showed some variation around the states and territories, with the lowest level of usage in Western Australia. We also noticed slightly fewer Australians in regional and rural locations accessing the internet daily.

Proportion that access the internet daily

79%	Total
80%	New South Wales
82%	Victoria
78%	Queensland
80%	South Australia
72%	Western Australia
78%	Tasmania
80%	Northern Territory
91%	Australian Capital Territory



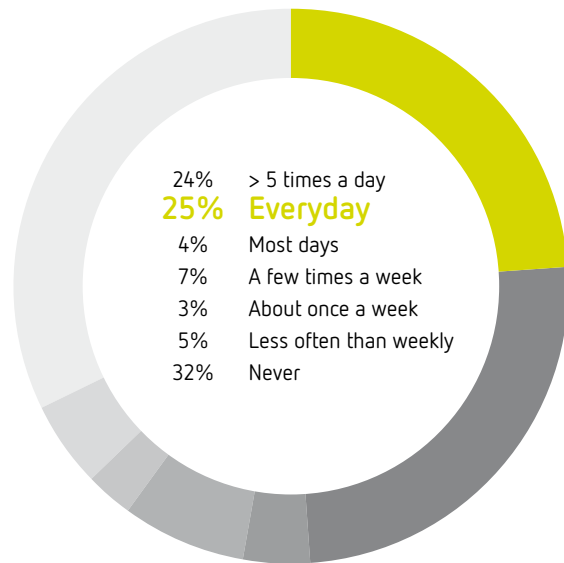
Those who own hand held devices (i.e. smartphone, tablet, iPod touch) or internet enabled TVs tend to access the internet more frequently.

Proportion that access the internet 5+ times a day	
Total	52%
Own a desktop	52%
Own a laptop	59%
Own a smartphone	64%
Own a tablet (i.e. iPad)	66%
Own an internet enabled TV	70%
Own an iPod touch (or something similar)	72%

Social networking site usage

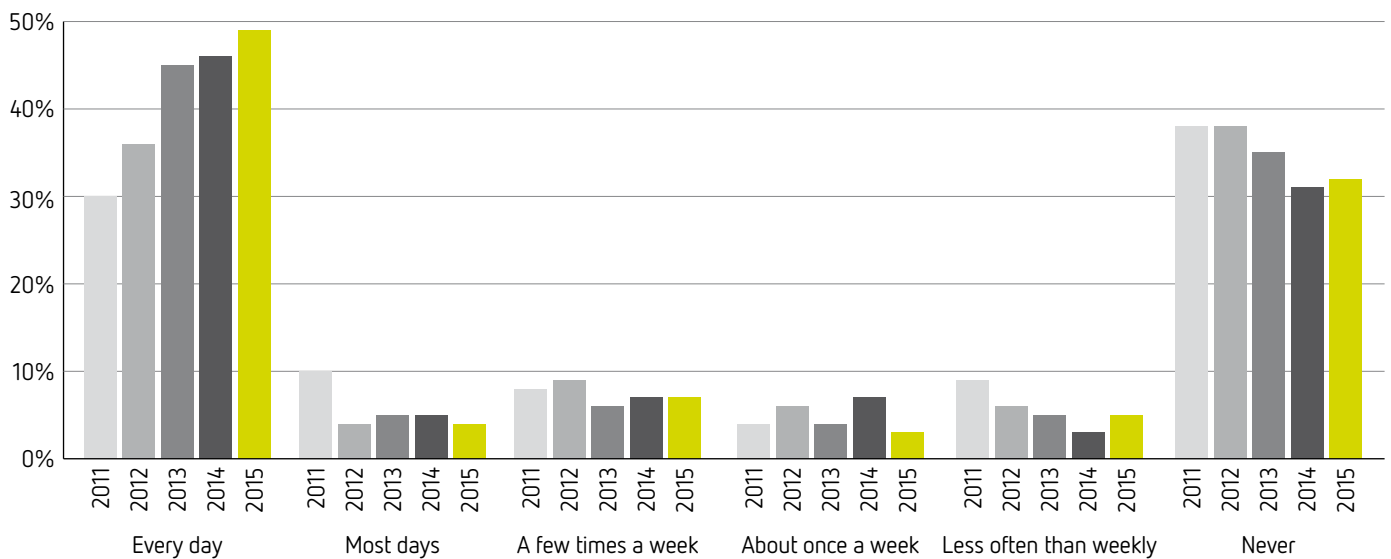
Among internet users, 68% use social networking sites, which is similar to last year (69%). The table below reveals a slight increase in frequency of use with 49% accessing these sites every day (up marginally from 46%) and 24% checking social media more than five times a day (19% last year). This suggests the intensity of social networking usage has gradually increased since 2011 but overall use might have plateaued.

Frequency of using social networking sites



Frequency of using social networking sites	2011	2012	2013	2014	2015
At least once a day	30%	36%	45%	46%	49%
Most days	10%	4%	5%	5%	4%
A few times a week	8%	9%	6%	7%	7%
About once a week	4%	6%	4%	7%	3%
Less often than weekly	9%	6%	5%	3%	5%
Never	38%	38%	35%	31%	32%

Frequency of using social networking sites - trends



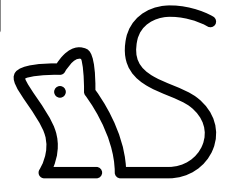
Base: All internet users (796)
 Q2a. How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?
 Note: Rounding occurs

Social networking site usage by age, gender and location

Females and younger Australians (below 40) remain the most prolific social networking users with much greater proportions in these segments using social media *per se* and more frequently than others.

Usage and frequency by state emerged as above average in Tasmania and below average in Western Australia and ACT. All other states were more in line with the national average. Only minor differences are apparent when comparing metropolitan and regional results.

49% of Australians use social networking sites at least once a day



Frequency of using social networking sites	Total	Male	Female	18-29	30-39	40-49	50-64	65+
At least once a day	49%	44%	55%	79%	64%	49%	37%	17%
Most days	4%	4%	4%	3%	5%	2%	4%	5%
A few times a week	7%	7%	7%	2%	8%	12%	7%	8%
About once a week	3%	3%	2%	<1%	5%	4%	1%	6%
Less often than weekly	5%	3%	6%	1%	5%	5%	8%	3%
Never	32%	39%	26%	15%	14%	29%	44%	61%

Frequency of using social networking sites	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
At least once a day	49%	51%	50%	51%	50%	42%	61%	48%	43%	50%	48%
Most days	4%	3%	3%	4%	6%	4%	10%	7%	8%	4%	4%
A few times a week	7%	8%	6%	4%	12%	9%	3%	11%	6%	6%	9%
About once a week	3%	3%	4%	2%	3%	2%	1%	10%	8%	4%	1%
Less often than weekly	5%	8%	3%	2%	4%	3%	<1%	2%	2%	4%	3%
Never	32%	28%	34%	37%	25%	40%	24%	23%	34%	32%	33%

Base: All Internet users (796)

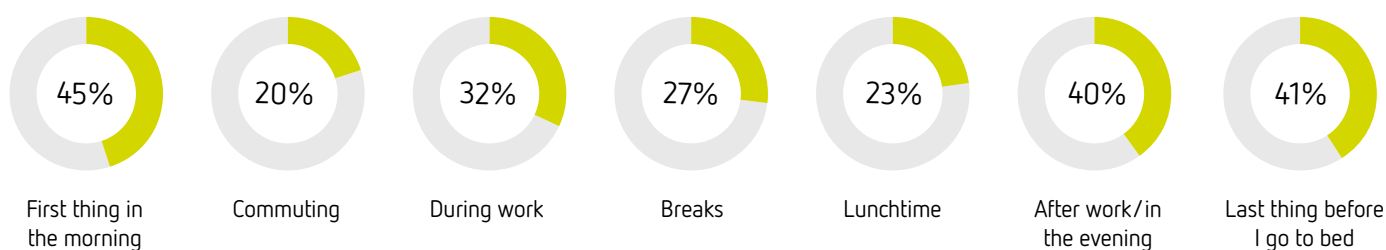
Q2a. How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?

Note: Rounding occurs

Social media usage by time of day

Australians still tend to access social networking sites at different stages throughout the day, but more often first thing in the morning or after work, including just before bed. In previous years, a majority of Australians would check-in after work but now first thing in the morning is a more popular time for social networking.

Females remain more likely to use social media first thing in the morning, while males prefer to access it during or after work. A majority of younger Australians aged 18-29 like to check-in when they wake up and before bed, while 30-39 year olds like viewing later in the day. For older age groups (40+), habits are mixed, however first thing in the morning is more popular than other times.



When we socially network	2012	2013	2014	2015
First thing in the morning	33%	37%	43%	45%
Commuting	16%	16%	17%	20%
During work	n/a	12%	21%	32%
Breaks	25%	22%	31%	27%
Lunchtime	25%	22%	30%	23%
After work/in the evening	63%	53%	58%	40%
Last thing before I go to bed	40%	42%	48%	41%

When we socially network	Male	Female	18-29	30-39	40-49	50-64	65+
First thing in the morning	42%	47%	56%	31%	44%	46%	46%
Commuting	22%	18%	30%	21%	12%	17%	10%
During work	34%	30%	43%	26%	27%	25%	37%
Breaks	31%	23%	46%	23%	21%	21%	6%
Lunchtime	25%	20%	32%	24%	14%	20%	15%
After work/in the evening	44%	36%	42%	50%	38%	35%	23%
Last thing before I go to bed	43%	40%	55%	40%	35%	34%	32%

When we socially network	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
First thing in the morning	40%	50%	47%	34%	50%	61%	39%	45%	45%	46%
Commuting	16%	21%	21%	23%	26%	17%	11%	22%	23%	14%
During work	31%	28%	37%	31%	35%	33%	44%	34%	34%	28%
Breaks	24%	24%	24%	30%	44%	36%	32%	28%	29%	22%
Lunchtime	21%	22%	20%	29%	31%	21%	24%	23%	23%	22%
After work/in the evening	41%	31%	38%	46%	54%	43%	41%	51%	39%	41%
Last thing before I go to bed	41%	42%	29%	47%	54%	51%	59%	39%	41%	41%

Base: Users of social media (539)
 Q2b. When do you most commonly look at your social networking sites?
 Notes: Multiple responses allowed. Rounding occurs

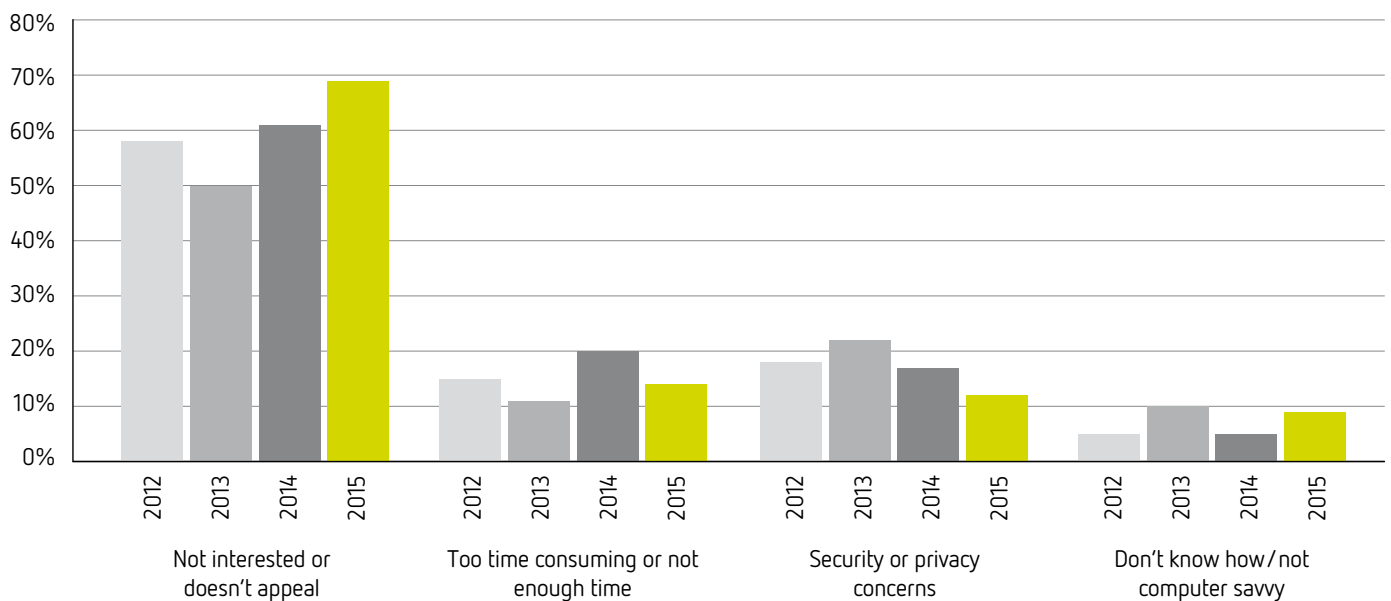
Reasons for not using social media

Overall 32% of internet users reported that they never use social media. This was highly skewed to the over 50s. Among those aged 18-29 only 15% never use social media. The chart below shows that lack of interest or appeal continues to be the primary reason for those not using social media (60%) and this is even more prominent than in previous years. The view that social networking is too time consuming is less prevalent than last year as are security and privacy concerns.

Reasons for not using social networking sites

69%	Not interested or doesn't appeal
14%	Too time consuming or not enough time
12%	Security or privacy concerns
10%	Don't like to tell people about myself
9%	Don't agree with it
9%	Don't know how or not computer savvy
6%	Prefer face to face social interaction
3%	Prefer phone to talk to friends
3%	Prefer email to communicate

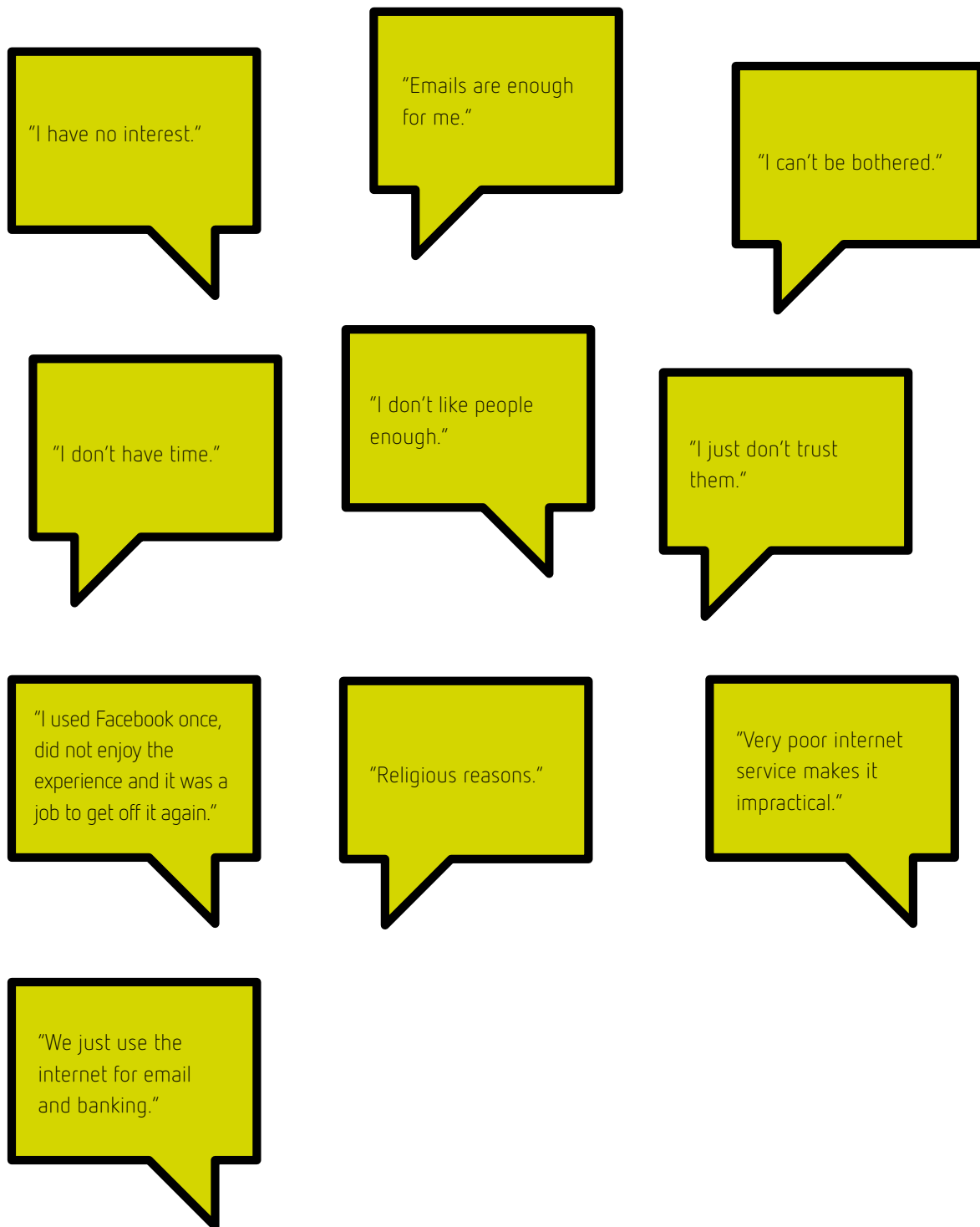
Reasons for not using social networking sites



Base: Non users of social media (257)
 Q3a. Why don't you use social networking sites?
 Notes: Multiple responses allowed

Reasons for not using social media

Some gave other reasons for not using social media (6%) and a selection of the verbatim comments provided are highlighted below.



Social networking sites used

Facebook continues to dominate as the most used site with 93% of social networkers maintaining a Facebook profile but usage appears to have fallen slightly since 2012. Nevertheless, it's still extremely popular across all ages and locations.

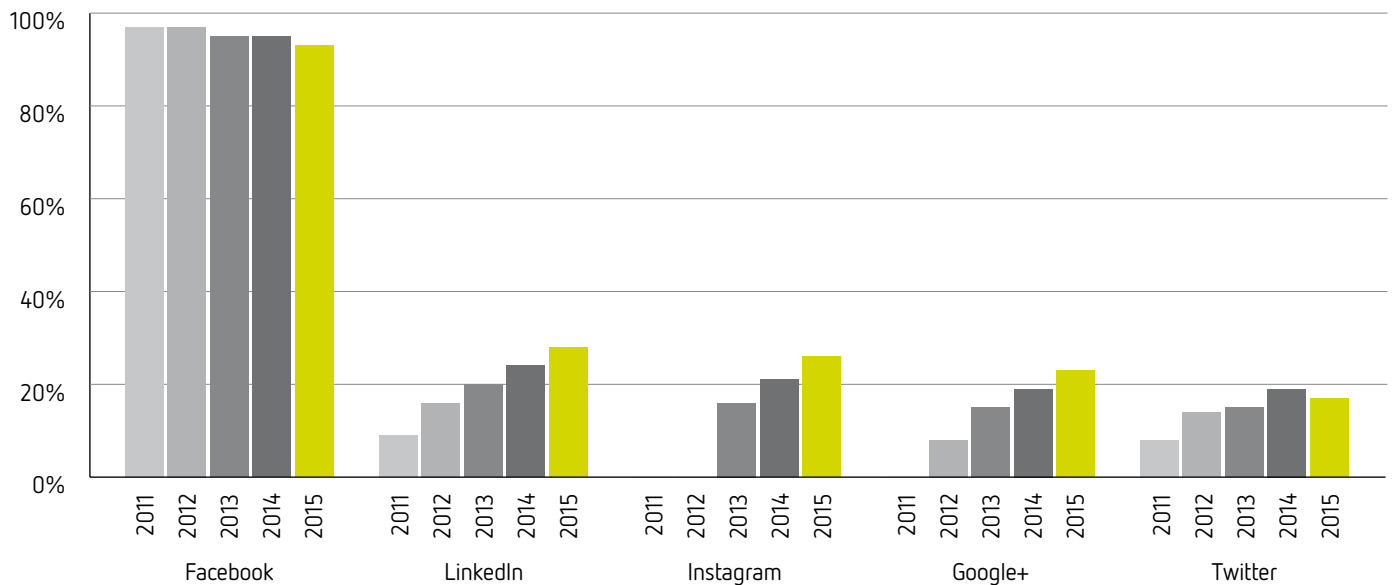
For other social networking platforms, there has been a gradual increase in numbers using LinkedIn, Instagram and Google+ and a small decline in Twitter users.

LinkedIn usage remains higher among males, those working full-time and higher income earners. Visual platforms like Instagram, Snapchat and Tumblr continue to appeal more to the younger age demographics; usage is much lower in over 30s. Males use Twitter more than females while Pinterest is far more appealing to the latter.

Social networking sites used

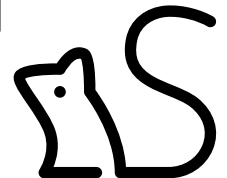
93%	Facebook
28%	LinkedIn
26%	Instagram
23%	Google+
17%	Twitter
17%	Pinterest
15%	Snapchat
5%	Tumblr
3%	Vine
3%	Yelp
1%	Foursquare

Social networking sites used



Social networking sites used

Facebook continues to dominate as the most used site with 93%



Social networking sites used	Male	Female	18-29	30-39	40-49	50-64	65+
Facebook	92%	93%	97%	93%	95%	87%	88%
LinkedIn	35%	21%	23%	34%	29%	33%	12%
Instagram	22%	29%	54%	21%	17%	12%	2%
Google+	21%	24%	20%	29%	27%	20%	16%
Twitter	23%	12%	20%	28%	16%	10%	4%
Pinterest	8%	25%	22%	18%	18%	14%	8%
Snapchat	14%	15%	38%	7%	9%	3%	-
Tumblr	6%	4%	14%	2%	2%	4%	-

Social networking sites used	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Facebook	89%	96%	92%	93%	97%	100%	100%	92%	93%	93%
LinkedIn	29%	38%	18%	17%	26%	24%	21%	22%	33%	16%
Instagram	27%	23%	27%	27%	28%	11%	16%	20%	30%	17%
Google+	30%	16%	22%	26%	19%	16%	22%	22%	23%	23%
Twitter	21%	18%	11%	13%	15%	16%	20%	24%	19%	14%
Pinterest	17%	19%	19%	16%	14%	14%	11%	12%	16%	20%
Snapchat	13%	15%	10%	23%	24%	16%	12%	13%	16%	11%
Tumblr	8%	1%	3%	13%	5%	10%	3%	-	5%	6%

Base: Users of social media (539)

Q2c. Which of these social networking sites do you use?

Notes: Multiple responses allowed. Rounding occurs

Social networking sites we've stopped using

14% of those who use social media reported ceasing use of some sites this past year, which shows little change from prior years (11% in 2014 and 12% in 2013). Of those, Twitter continues to lose the most users, with 39% deleting their profile (45% in 2014) followed by Facebook and Snapchat.

Social networking sites we've stopped using

39%	Twitter
18%	Facebook
17%	Snapchat
13%	LinkedIn
12%	Instagram
9%	Google +
9%	Tumblr
6%	Pinterest
4%	Foursquare
2%	Yelp

*Base: Stopped using a social media channel in the past year (65)
Q2d. Over the past year, have you stopped using any social networking channels?
Q2e. Which ones?*

Frequency of using social networking sites

Frequency of Facebook usage has gradually increased since 2011, almost doubling from 16 visits per week to 31 in 2015. Females tend to go on Facebook more often than males and frequency is much greater in younger demographics, especially under 30s who check in nearly 50 times a week on average. By state, frequency of use is highest in South Australia and lowest in the Northern Territory.

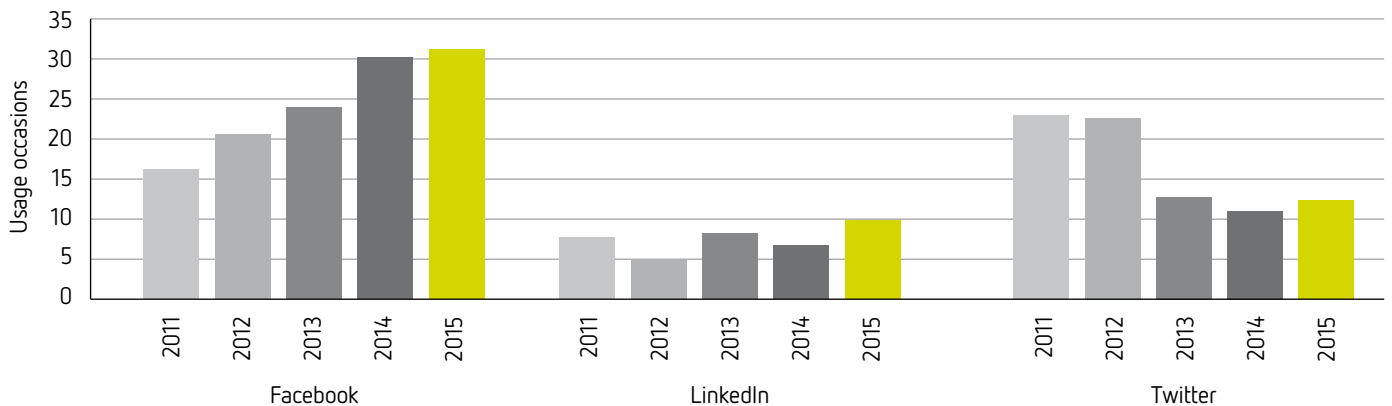
Twitter use frequency has almost halved since 2011 from an average of 23 visits to 12 while LinkedIn use has been fairly steady over this period, although frequency of use increased slightly relative to last year.

Instagram is being used quite often (nearly 26 times a week on average) and more so than last year (23 times per week).

Frequency of using social networking sites

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	93%	3%	11%	14%	19%	12%	39%	31.2
LinkedIn	28%	11%	40%	22%	8%	6%	8%	9.85
Instagram	26%	5%	21%	14%	20%	6%	33%	25.67
Twitter	17%	9%	26%	15%	25%	8%	12%	12.35
Pinterest	17%	14%	38%	17%	10%	9%	6%	6.61

Average usage occasions per week



Average usage occasions per week - Facebook	
Total	31.2
Male	30.21
Female	32.01
18 to 29	49.25
30 to 39	34.11
40 to 49	21.65
50 to 64	19.59
65+	11.36

Average usage occasions per week - Facebook	
Total	31.2
New South Wales	28.08
Victoria	31.72
Queensland	30.98
South Australia	38.45
Western Australia	34.72
Tasmania	35.18
Northern Territory	20.79
Australian Capital Territory	32.88
Metropolitan	32.43
Regional	28.72

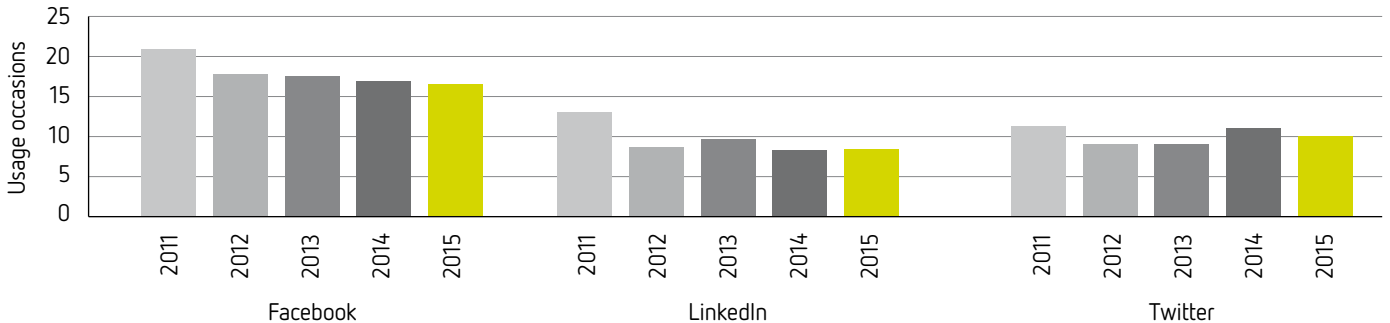
Time spent on social networking sites

The average time spent on Facebook has been around 17-18 minutes per visit since 2012. Multiplying average time spent by average number of usage occasions shows that the typical user spends over 8.5 hours per week on the site, which is similar to last year. Looking at other social media sites, users tend to spend more time on Pinterest than Facebook, reflecting that this is a highly visual, browsing-based platform. The average time spent on LinkedIn, Instagram or Twitter is around 8-10 minutes, consistent with previous years.

Time spent on social networking sites

Site	Proportion who use	Average time spent on each usage occasion						Average time (min)
		Up to 2 minutes	3 to 5 minutes	6 to 10 minutes	11 to 15 minutes	16 to 30 minutes	Over 30 minutes	
Facebook	93%	13%	29%	19%	11%	11%	16%	16.64
LinkedIn	28%	33%	30%	10%	10%	8%	5%	8.48
Instagram	26%	28%	30%	16%	11%	12%	3%	9.02
Twitter	17%	37%	14%	28%	7%	5%	10%	10.14
Pinterest	17%	15%	24%	15%	11%	15%	18%	17.9

Average time spent per week (mins)

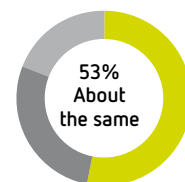


Base: Users of social media (533)
 Q6b. And roughly how long would you spend each time you use Facebook / LinkedIn / Instagram / Twitter / Pinterest?

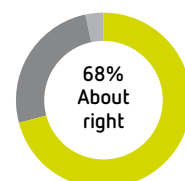
Users' views on time spent on social networking

A majority of users feel they spend about the same amount of time on social networking as previous years but over a quarter said their use had increased in the last year. Over two-thirds believe the time they spent on social networking was about right, but a quarter felt they spent too much time on it. Most expect to spend the same amount of time in the coming year. These results are in line with prior findings.

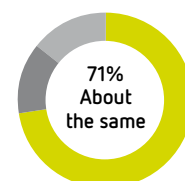
Change in time spent social networking over the past year	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Increased	28%	24%	30%	31%	24%	23%	31%	28%
Decreased	19%	15%	23%	27%	20%	15%	13%	15%
About the same	53%	60%	47%	40%	56%	62%	56%	57%



Perception of time spent social networking	Total	Male	Female	18-29	30-39	40-49	50-64	65+
About right	68%	71%	65%	62%	68%	77%	61%	82%
Too much	25%	20%	30%	34%	25%	17%	27%	14%
Not enough	3%	4%	2%	1%	5%	1%	7%	4%



Expectations for time spent social networking	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Increasing	13%	13%	14%	14%	13%	11%	18%	10%
Decreasing	14%	15%	13%	19%	14%	13%	11%	8%
About the same	71%	70%	72%	67%	71%	74%	69%	83%



Base: Users of social media (539). Note the 18-29 results prior to 2015 were actually for 20-29s.

Q6c. Compared to last year, have you increased, decreased or spent about the same amount of time using social networking sites?

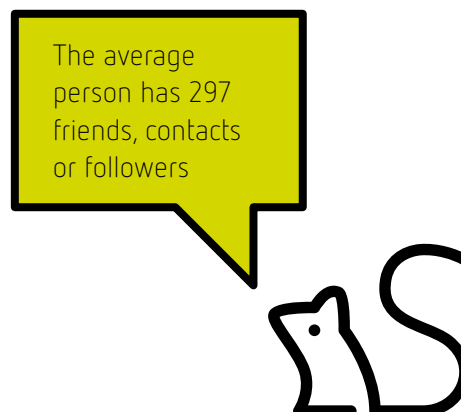
Q6d. When you think about the amount of time you currently spend on social networking sites, do you feel it is...?

Q6e. 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, contacts or followers in 2015 was 297. This is lower than last year but higher than prior years. Over half (56%) of all social media users claimed to have more than 100 contacts in their network, which is consistent with last year.

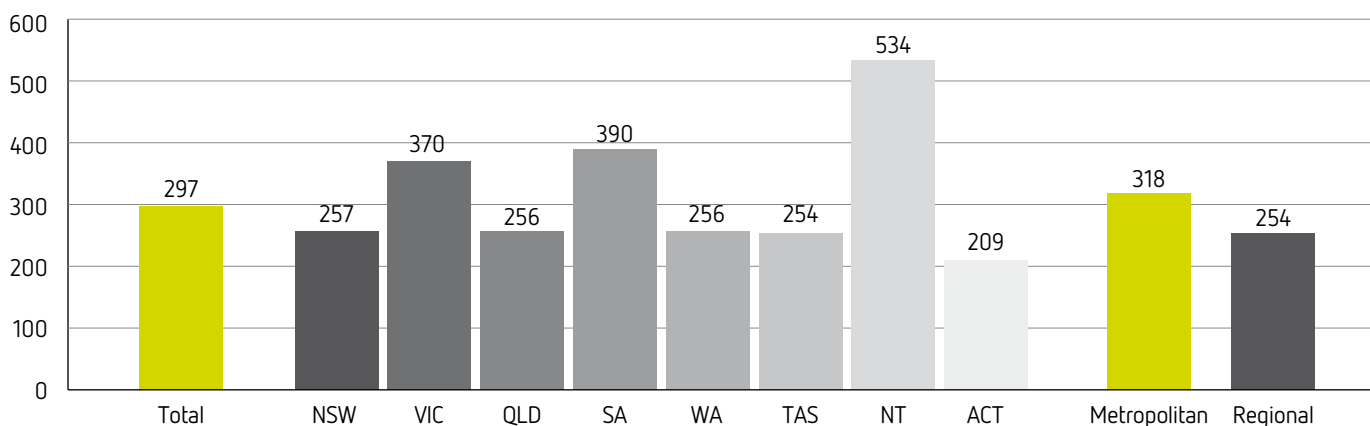
Interestingly, males reported more contacts than females this year but the opposite was true last year. Again we noticed a big difference across age groups, which is not surprising given the variation in use. Older users (aged 65+) tend to have significantly fewer contacts than those who are younger, particularly the 18-29 year olds. There was quite a range by state with Northern Territory residents reporting the highest number of friends and the ACT reporting the lowest. Metropolitan residents reported more contacts than their regional counterparts.



Number of friends, contacts or followers	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Up to 20	14%	9%	17%	6%	5%	5%	26%	46%
21 to 50	14%	10%	17%	4%	12%	20%	18%	27%
51 to 100	16%	17%	16%	11%	17%	19%	19%	19%
101 to 200	20%	22%	17%	20%	21%	28%	17%	4%
Over 200	36%	42%	32%	59%	46%	28%	20%	4%
Average	297	316	281	431	317	316	190	60

Number of friends, contacts or followers	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Average 2011	217	209	224	257	209	127	155	117
Average 2012	227	246	211	338	212	115	76	64
Average 2013	258	304	221	366	200	250	146	48
Average 2014	328	288	362	489	284	218	261	88
Average 2015	297	316	281	431	317	316	190	60

Average number of friends, contacts or followers by location



Base: Users of social media (539). Note the 18-29 results prior to 2015 were actually for 20-29s.

Q5a. How many different friends, contacts or followers do you have on all your social networking sites?

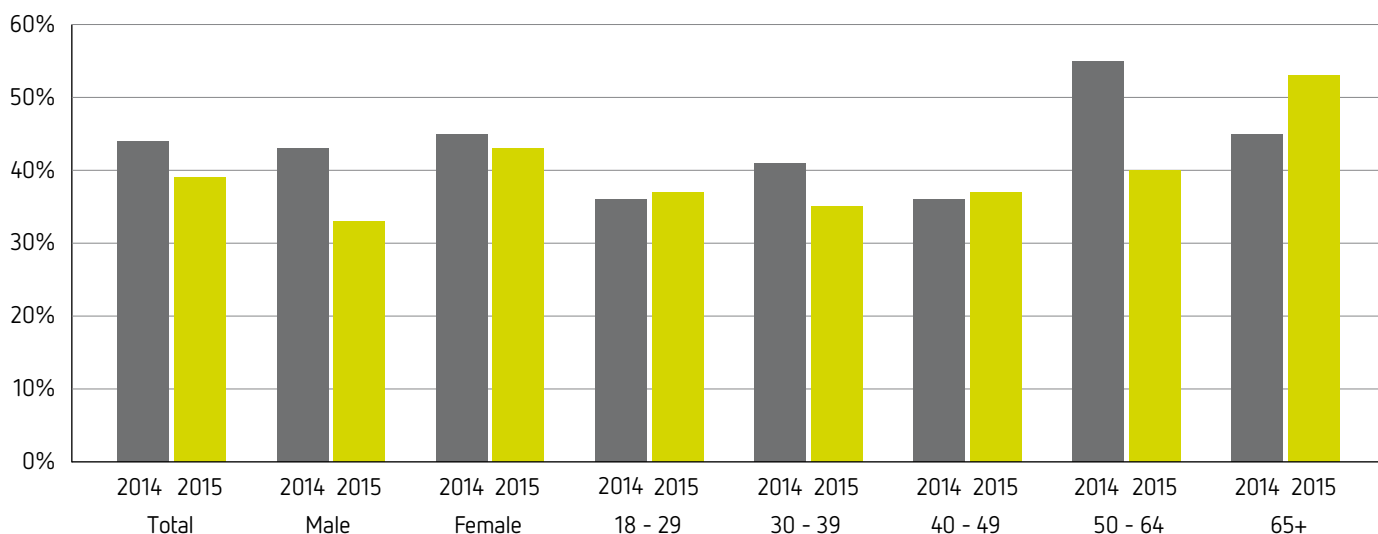
Note: Rounding occurs

*CAUTION: The sample size for NT (n=38) and ACT (n=33) is quite small and in the case of NT there was one outlier where the respondent claimed to have 10,000 friends and this bumps up the NT average significantly.

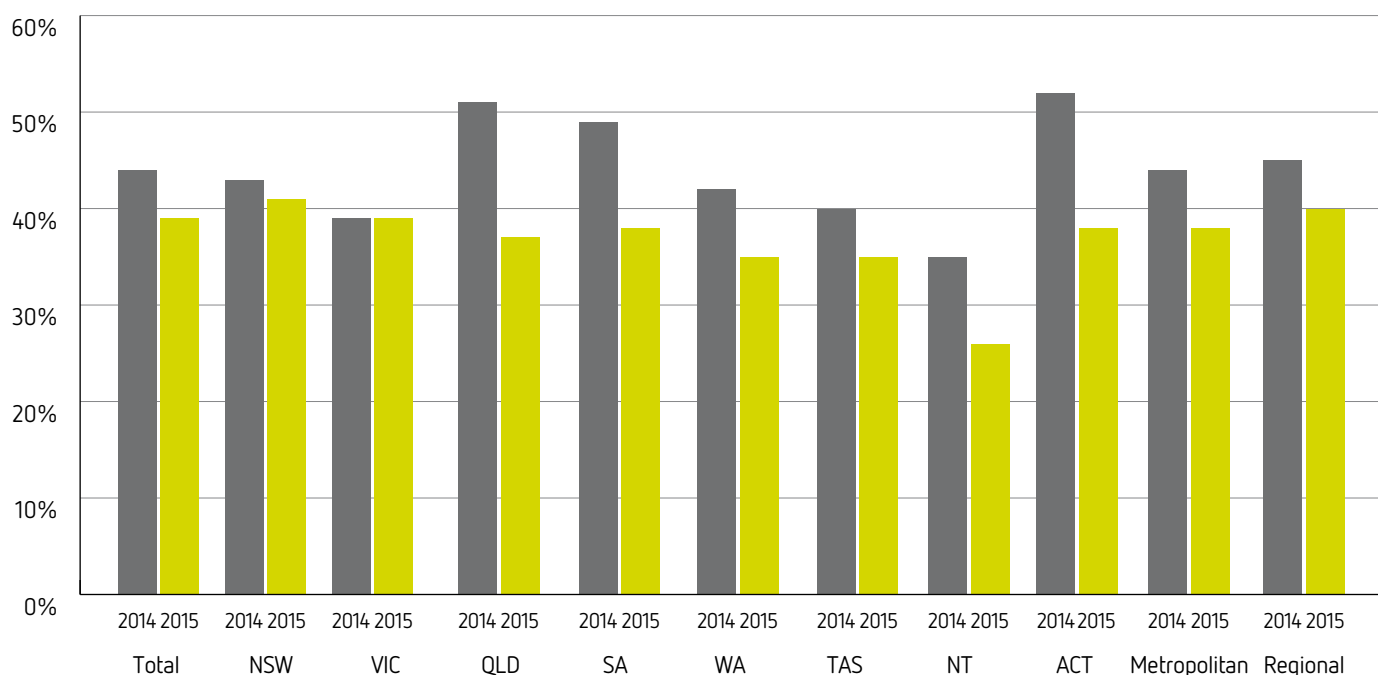
Number of friends, contacts or followers

The average number of social media friends and followers decreased from 328 to 297 as did the average proportion seeing them face to face in the past year (44% to 39%). Females were more likely to have seen their virtual contacts in person as were the older age groups (50+). Northern Territory residents were the least 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 by age



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



Base: Users of social media (539). Note the 18-29 results prior to 2015 were actually for 20-29s.
 Q5b. What percentage of your social networking contacts would you have seen in person over the past twelve months?

Number of Twitter accounts followed

On average, Twitter users follow 118 accounts, which has increased relative to last year but is consistent with the 2013 result. Frequency of use varies with 52% tweeting at least once a week and one in three less often, while 16% claimed to never post on Twitter.

Number of Twitter accounts followed

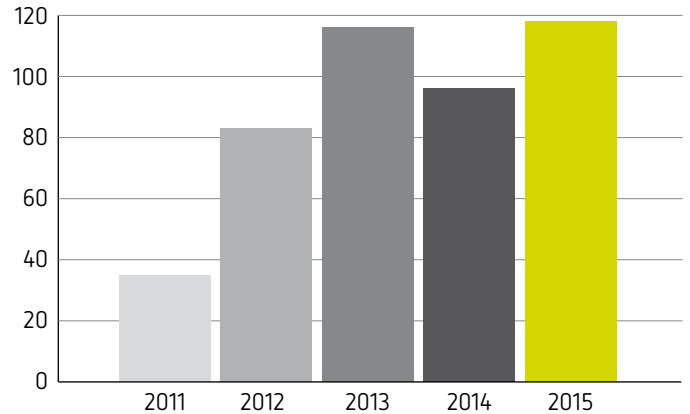
118	Average
18%	Up to 5
13%	6 to 10
18%	11 to 20
17%	21 to 50
30%	Over 50
3%	Don't know

Base: Users of Twitter (88)
Q5d. Approximately how many Twitter accounts do you follow?

How often do you tweet on average?	
More than five times a day	10%
Everyday	6%
Most days	6%
A few times a week	20%
About once a week	8%
Less than once a week	33%
Do not tweet at all	16%

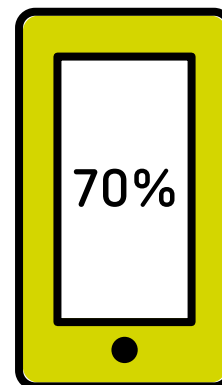
Base: Users of Twitter (88)
Q5dii. How often do you tweet on average?
Note: Rounding occurs

Number of Twitter accounts followed



Devices and applications used to access social media

Smartphones are still clearly the favoured device for social networking. Seven in ten social media users view their accounts on a smartphone, consistent with last year. Over half (52%) use laptops to check in but they aren't as popular for social media as in 2012 (69%). Tablet usage is solid but slightly lower (34% compared with 39% in 2014) while desktops are slowly going out of fashion with their use for social networking more than halved since 2011 (60% down to 28%). They are more popular for older users, especially those aged 65+, while mobile devices are the norm for many aged under 65.



70% of people use smartphones to access social media

Most are accessing social media on their mobile devices via apps (75%) rather than the website (14%) and those using apps has increased relative to last year (70%). Around one in ten check in using both avenues but most prefer using an app (67%).

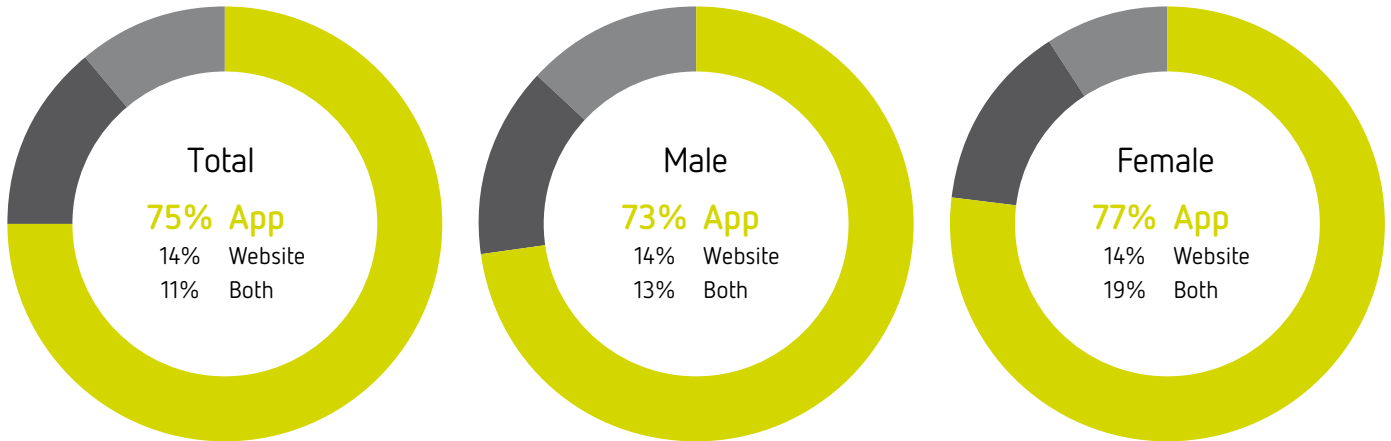
Devices used to access social media	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Smartphone	70%	73%	68%	90%	82%	75%	56%	11%
Laptop computer	52%	49%	55%	57%	40%	54%	60%	48%
Tablet	34%	32%	35%	31%	34%	34%	40%	28%
Desktop computer	28%	36%	22%	25%	24%	23%	34%	45%
iPod Touch	3%	2%	4%	1%	2%	5%	4%	4%
Internet-enabled TV	2%	2%	2%	1%	2%	2%	3%	-

Devices used to access social media	2011	2012	2013	2014	2015
Smartphone	34%	53%	67%	71%	70%
Laptop computer	50%	69%	64%	55%	52%
Tablet	4%	18%	35%	39%	34%
Desktop computer	60%	54%	46%	38%	28%
iPod Touch	5%	6%	5%	6%	3%
Internet-enabled TV	n/a	n/a	n/a	2%	2%

Base: Users of social media (539)
Q7a. What devices do you use to access social network sites?

Devices and applications used to access social media

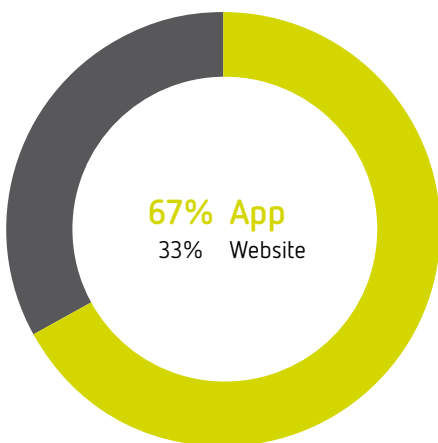
How mobile users access social media



How mobile users access social media	18-29	30-39	40-49	50-64	65+
App	82%	76%	80%	64%	44%
Website	4%	14%	17%	21%	47%
Both	14%	10%	3%	15%	9%

Base: Users of social media on mobile devices (440). Note the 18-29 results prior to 2015 were actually for 20-29s. Q7ai. What devices do you use to access social network sites?

Which platform do you prefer



Base: Users of social media on mobile devices that access social media via apps and the website (49). Q7b. What devices do you use to access social network sites?

Where are social networking sites used?

The most common place for social networking is at home in the living room but the bedroom – especially for younger users – and study – particularly for older users – is also popular. These findings have remained relatively stable over the past few years with steady growth in social media use while in the bathroom or toilet. This is more common for males and users aged under 40.

Social media use in all other locations has declined slightly relative to last year but there are still solid minorities checking in at work, on public transport, at restaurants, bars and parties, or in the car – hopefully not while driving.

Locations where social media is used

93%	At home
32%	At work
26%	On public transport
21%	Restaurants, bars, parties
19%	In the car
16%	At sporting events
15%	At school or college

Locations where social media is used	2011	2012	2013	2014	2015
At home	97%	98%	96%	95%	93%
At work	22%	30%	34%	39%	32%
On public transport	10%	29%	32%	31%	26%
Restaurants, bars, parties	11%	22%	26%	30%	21%
In the car	10%	16%	18%	26%	19%
At sporting events	8%	17%	19%	21%	16%
At school or college	10%	12%	13%	12%	15%

Locations where social media is used	Total	Male	Female	18-29	30-39	40-49	50-64	65+
At home	93%	94%	92%	88%	94%	94%	96%	96%
At work	33%	39%	27%	43%	45%	29%	21%	5%
On public transport	26%	26%	26%	46%	30%	14%	18%	-
Restaurants, bars, parties	21%	20%	21%	37%	23%	17%	10%	2%
In the car	19%	21%	18%	30%	19%	15%	17%	4%
At sporting events	16%	20%	14%	26%	23%	15%	6%	-
At school or college	15%	16%	14%	34%	14%	5%	3%	2%

Locations where social media is used	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
At home	93%	91%	90%	95%	99%	95%	90%	93%	95%	90%	98%
At work	33%	33%	30%	29%	32%	36%	47%	50%	35%	37%	23%
On public transport	26%	26%	30%	20%	27%	30%	19%	22%	22%	33%	12%
Restaurants, bars, parties	21%	21%	22%	18%	24%	21%	17%	18%	21%	22%	18%
In the car	19%	19%	20%	18%	22%	25%	10%	25%	16%	22%	14%
At sporting events	16%	16%	21%	12%	18%	16%	13%	14%	10%	17%	14%
At school or college	15%	13%	19%	12%	15%	14%	15%	13%	10%	18%	8%

Base: All social media users (539). Note the 18-29 results prior to 2015 were actually for 20-29s.
 Q7c. Where do you use social networking sites – either on your computer or mobile device?
 Note: Multiple responses allowed

Where are social networking sites used?

Social media use in the home

72%	Lounge/living room
43%	Bedroom
35%	Study
24%	Kitchen
14%	Bathroom
14%	Toilet

Where in the home social media is used	2011	2012	2013	2014	2015
Lounge/living room	48%	58%	66%	70%	72%
Bedroom	31%	41%	44%	49%	43%
Study	47%	43%	36%	37%	35%
Kitchen	11%	16%	21%	22%	24%
Bathroom	4%	5%	7%	10%	14%
Toilet	n/a	5%	6%	10%	14%

Where in the home social media is used	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Lounge/living room	72%	72%	72%	77%	82%	79%	56%	57%
Bedroom	43%	46%	40%	71%	48%	35%	23%	12%
Study	35%	38%	32%	31%	33%	27%	40%	48%
Kitchen	24%	23%	24%	34%	24%	22%	17%	14%
Bathroom	14%	16%	12%	23%	21%	7%	8%	3%
Toilet	14%	20%	10%	25%	24%	6%	4%	3%

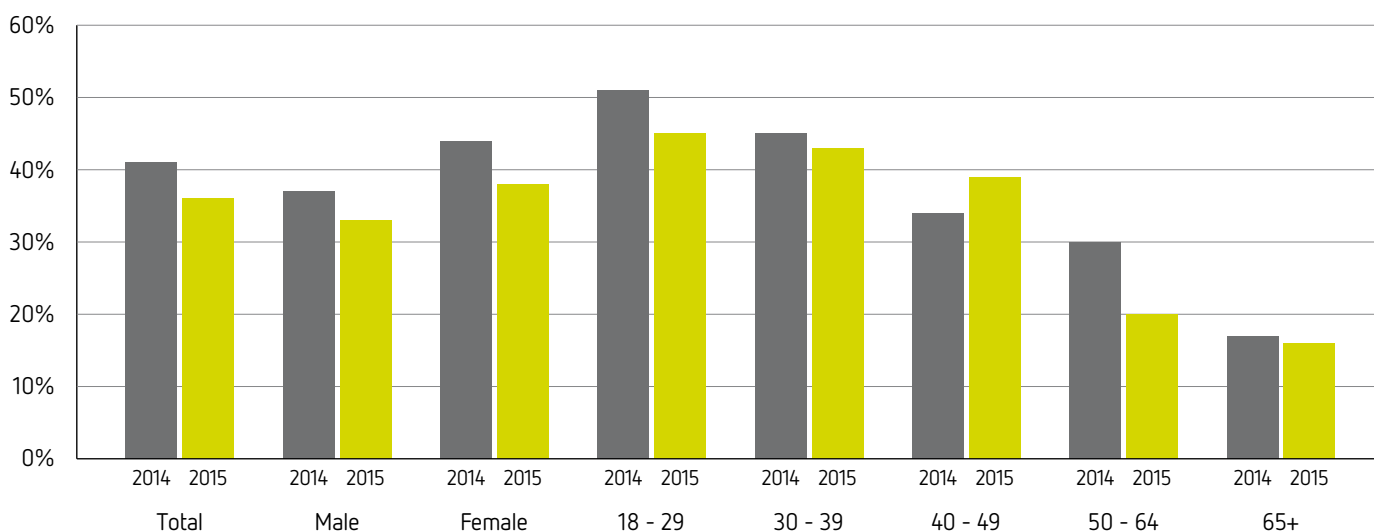
Where in the home social media is used	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Lounge/living room	72%	67%	75%	70%	71%	83%	90%	86%	74%	72%	73%
Bedroom	43%	42%	40%	40%	43%	52%	51%	63%	43%	49%	31%
Study	35%	36%	34%	35%	34%	30%	38%	19%	29%	37%	30%
Kitchen	24%	23%	29%	20%	22%	24%	24%	18%	29%	26%	20%
Bathroom	14%	14%	15%	15%	13%	11%	16%	9%	16%	14%	14%
Toilet	14%	12%	15%	13%	20%	20%	22%	13%	16%	17%	10%

Base: Users of social media sites at home (505). Note the 18-29 results prior to 2015 were actually for 20-29s.
 Q7d. Where would you normally use these sites at home? In which rooms of the house?
 Note: Multiple responses allowed

TV and social networking

Just over a third of users check in while watching television but this is fewer than last year. This behaviour is more common for females and under 50s. News and current affairs are still the most popular programs people watch while social networking, and this has become more prevalent in the past two years. All other genres are watched while checking in by around a third to a quarter of people but there has been some growth in those networking when watching reality TV. This suggests efforts to encourage engagement via social media during such programs has been quite effective. Fewer people discuss the programs they watch on social media compared to last year (24% versus 30%) with less now saying it increased their enjoyment of the program.

Proportion that use social media while watching TV

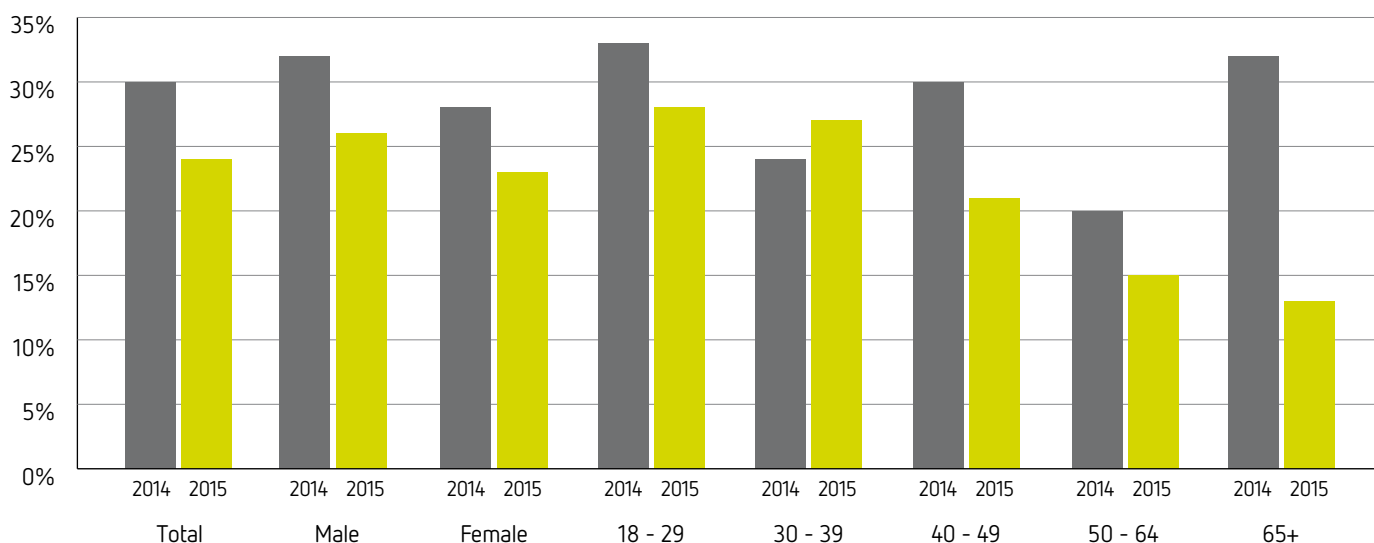


Base: All social media users (533)
Q8a. Do you use social media when you watch TV?

TV genres favoured while social networking	2012	2013	2014	2015
News and current affairs	42%	37%	44%	50%
Reality TV show	31%	38%	31%	41%
Sport	31%	35%	32%	33%
Movies	27%	26%	25%	32%
Documentaries	22%	21%	28%	30%
Comedy	39%	33%	30%	31%
Dramas	28%	31%	36%	26%
Soaps	23%	19%	20%	25%

TV and social networking

Discuss TV program on social media while watching it



Impact of discussing television programs on social media on enjoyment	2014	2015
Increases my enjoyment	41%	33%
Decreases my enjoyment	9%	3%
No impact on my enjoyment	51%	47%
Don't know or not sure	-	18%

Base: Users of social media while watching TV (190). Note the 18-29 results prior to 2015 were actually for 20-29s.
 Q8b. Which types of shows do you mainly use social media while watching?
 Q8c. Do you discuss TV on social media during the program?
 Q8d. Does discussing a TV program on social media during the program change your enjoyment of the program? (Base 42)
 Note: Multiple responses allowed for Q8b



Reasons for using social networking sites

There are many reasons given for using social media but nearly all see it as a way to keep in touch with friends or family and this has always been the dominant influence. Some people like sharing photo or video content or news and current affairs content while some use it for coordinating social events, research or commercial purposes such as following brands or finding out about entertainment and offers. The average number of reasons mentioned here has declined from 5 in 2014 to 4 but the younger cohort aged below 30 still access it for more purposes than older users.

20% of people use social media to follow brands for offers and promotions



Reasons for using social networking sites	2011	2012	2013	2014	2015
Catch up with family and friends	93%	94%	94%	95%	92%
Share photographs or videos	56%	51%	47%	64%	45%
Get information on news and current events	n/a	27%	29%	47%	40%
Co-ordinate parties or other shared activities	32%	33%	29%	33%	24%
Follow or find out about particular brands or businesses in general	15%	22%	25%	32%	24%
Find out about entertainment events	26%	23%	24%	32%	23%
Play games	24%	18%	21%	26%	21%
Research holiday destinations or travel offers	12%	13%	13%	26%	20%
Follow particular brands to access offers or promotions	11%	18%	15%	29%	20%
Research products and services you might want to buy	12%	16%	20%	28%	19%
Find people with the same interests	14%	13%	14%	22%	17%
Meet new friends	18%	14%	10%	20%	14%
Follow celebrities	6%	9%	9%	12%	12%
Provide reviews/write blogs about products you have bought	6%	6%	8%	15%	11%
Pressure from family and friends to use them	n/a	11%	7%	9%	9%
Engage with a Government representative or department	5%	7%	6%	9%	8%
Find potential dates	n/a	3%	5%	9%	6%

Average number of usage reasons	2011	2012	2013	2014	2015
Total	3.3	3.7	3.6	5.1	4.1
Male	2.8	4.0	3.7	5.0	4.1
Female	3.6	3.5	3.6	5.1	4.1
18 to 29	3.8	4.8	4.4	6.4	5.2
30 to 39	3.0	3.7	3.4	4.5	4.1
40 to 49	2.8	2.8	3.3	4.1	3.8
50 to 64	2.7	2.7	3.4	3.9	2.9
65+	2.2	2.9	2.3	4.6	3.8

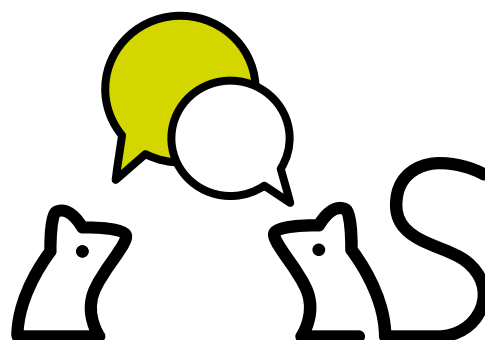
Base: Users of social media (533).

Q4a. 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?

Note: The 18-29 results prior to 2015 were actually for 20-29s.

Reasons for using social networking sites

In the following table, we compare reasons for use by gender and age. Females nominated sharing photos and videos or following brands to access promotions more frequently than males. However, males are more likely to be seeking a connection with others such as sharing the same interests or meeting new friends or to write reviews. Nearly all reasons for use are more prevalent in the under 30s but especially sharing photos and videos, coordinating parties, following brands or celebrities and finding out about events.



Reasons for using social networking sites	Male	Female	18-29	30-39	40-49	50-64	65+
Catch up with family and friends	90%	94%	95%	93%	93%	86%	90%
Share photographs or videos	40%	50%	57%	47%	44%	34%	35%
Get information on news and current events	40%	40%	47%	43%	44%	24%	40%
Co-ordinate parties or other shared activities	25%	23%	41%	27%	21%	7%	6%
Follow or find out about particular brands or businesses in general	23%	25%	35%	23%	28%	12%	18%
Find out about entertainment events	23%	23%	40%	18%	22%	10%	9%
Follow particular brands to access offers and promotions	17%	23%	27%	20%	18%	12%	22%
Research products or services you might want to buy	20%	19%	28%	20%	15%	11%	21%
Research holiday destinations or travel offers	20%	21%	26%	15%	18%	18%	21%
Play games	19%	23%	26%	25%	10%	17%	29%
Find people with the same interests	21%	15%	19%	15%	21%	13%	20%
Meet new friends	18%	10%	22%	11%	12%	7%	13%
Provide reviews and write blogs about products you have bought	13%	9%	13%	12%	8%	7%	14%
Follow celebrities	15%	10%	22%	12%	12%	4%	4%
Engage with a Government representative or department	10%	6%	5%	9%	2%	9%	20%
Find potential dates	7%	6%	11%	3%	4%	3%	8%
Pressure from family and friends to use them	9%	9%	7%	11%	7%	13%	8%

Base: Users of social media (539)

Q4a. 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?

Notes: Multiple responses allowed.

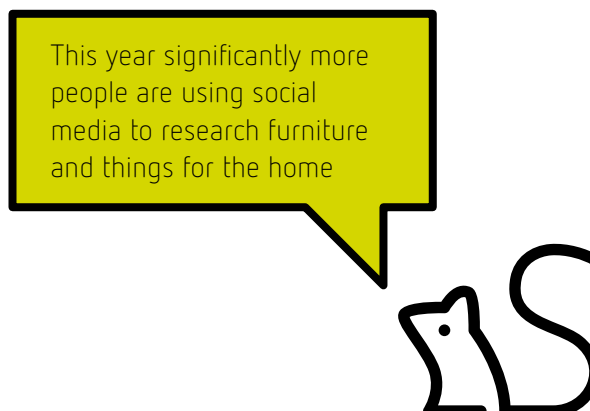
Types of products or services researched on social networking sites

Fewer people are using social media to research products and services to buy (19%, down from 28% in 2014). Among this group, the most common products sought include clothing and fashion, electrical goods or furniture and items for the household.

Products or services researched on social networking sites	2011	2012	2013	2014	2015
Clothing and fashion	42%	53%	44%	49%	53%
Electrical goods	39%	31%	26%	43%	44%
Furniture and things for the home	28%	17%	11%	29%	40%
Music	19%	32%	19%	20%	26%
Computers and hardware	21%	20%	21%	24%	24%
Cosmetics, beauty and fragrances	4%	22%	20%	12%	23%
Software	8%	14%	9%	18%	21%
Videos	4%	14%	8%	17%	16%
Computer games	9%	10%	15%	14%	9%

Base: Use social networking sites to research products or services (103)

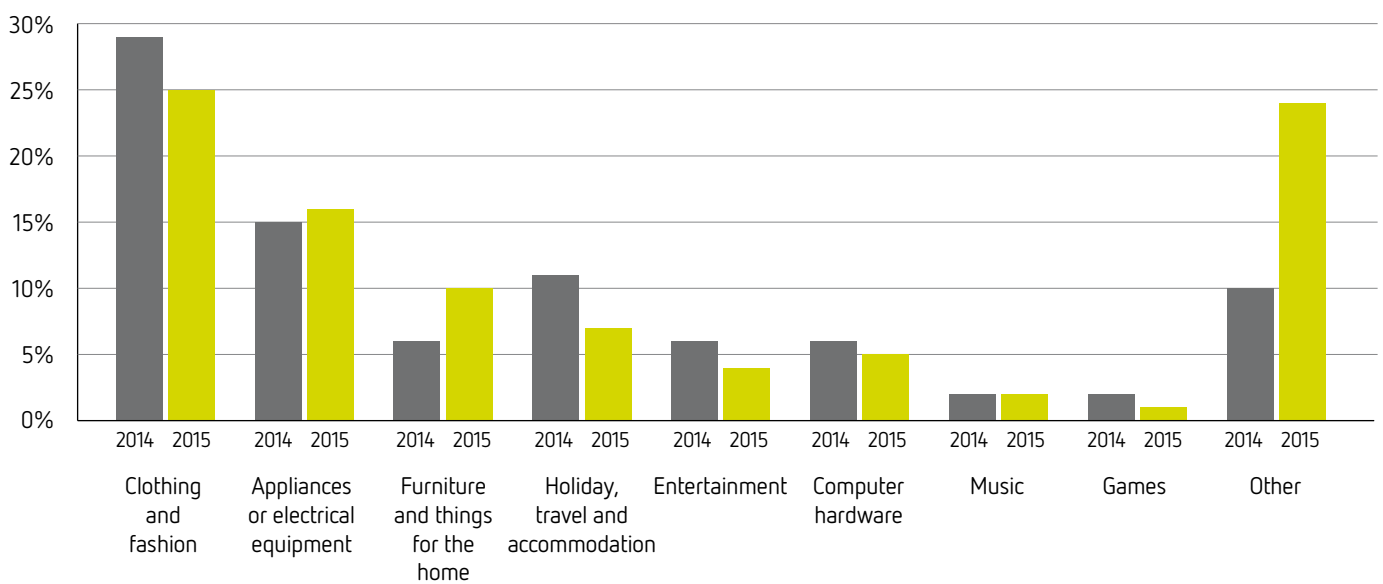
Q4c. You mentioned that you use social networking sites to research products or services you might want to buy? What types of products or services would you mainly look for?



Path to purchase

Among the 19% who use social media platforms to research something they want to buy, we found clothing and fashion items most commonly mentioned followed by appliances and furniture and homeware products. Now similar proportions are searching on their mobile (40%) or computer (43%) whereas in the past the computer was clearly preferred. There has also been an increase in those who use both devices (from 7% to 15%). Purchase incidence almost doubled from 2011 to 2014 but it was lower this year at 49%. However, nearly two thirds of those did purchase online.

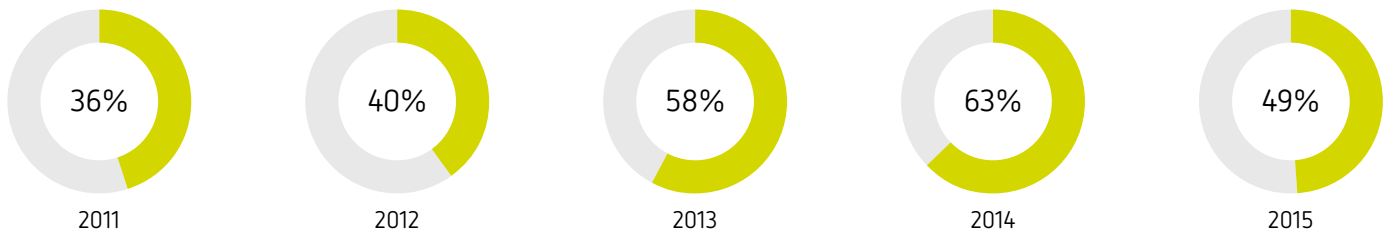
What was looked for on last search occasion?



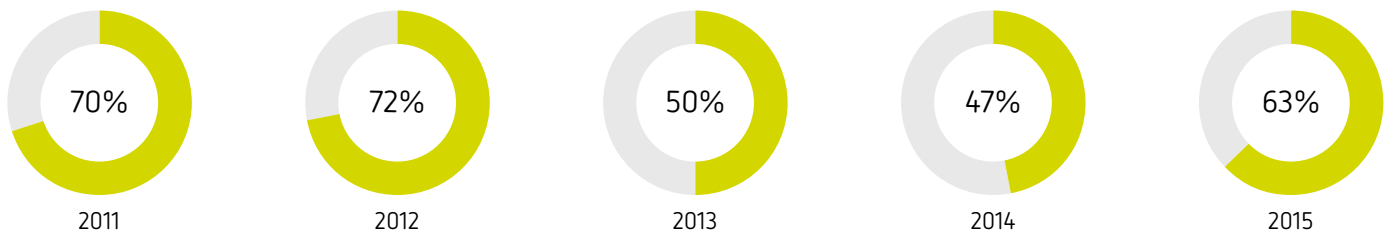
How was that research conducted?	2011	2012	2013	2014	2015
Computer	79%	62%	67%	53%	43%
Mobile device	6%	18%	23%	40%	40%
Both	8%	8%	7%	7%	15%
Neither	8%	13%	3%	1%	3%

Path to purchase

The research lead to a purchase



The resultant purchase was made online



Base: Ever research products/services on social networking sites (103)

Q9a. 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?

Q9b. Did you do that research on a computer or a mobile device?

Q9c. Did that research lead to a purchase?

Q9d. Was that purchase made online? (Base: Those who made a purchase (55))

Social media and brands

About a third of social media users follow businesses or brands via social media and this has remained fairly consistent since 2013. Gender differences this year were marginal but those aged under 30 are now clearly the most avid brand followers on social media. It's more common for SA and NSW residents to follow brands or businesses compared to other states.

Follows a social networking group associated with a particular brand or business	2011	2012	2013	2014	2015
Total	20%	25%	35%	33%	32%
Male	15%	25%	35%	27%	31%
Female	23%	25%	36%	37%	34%
18 to 29	20%	32%	42%	43%	48%
30 to 39	23%	38%	31%	41%	30%
40 to 49	8%	17%	31%	31%	25%
50 to 64	22%	14%	23%	18%	33%
65+	7%	17%	16%	11%	6%

Follows a social networking group associated with a particular brand or business

32%	Total
37%	New South Wales
33%	Victoria
25%	Queensland
39%	South Australia
27%	Western Australia
23%	Tasmania
25%	Northern Territory
27%	Australian Capital Territory
33%	Metropolitan
30%	Regional

Base: All social networking users (539). Note the 18-29 results prior to 2015 were actually for 20-29s. Q10a. Do you follow any social networking group associated with any particular business or brand?

What do consumers want from businesses or brands they follow?

A third of social media users aren't looking for anything from business via social media and this proportion has increased over the past year. For those who want something from the business or brand they follow, discounts remain most prominent – albeit now in the minority. In fact, there has been a marked decline in the proportions expecting any of these benefits since 2013.

What do consumers want from businesses or brands that they follow?	2011	2012	2013	2014	2015
Discounts	57%	64%	66%	62%	45%
Give-aways	45%	54%	56%	51%	35%
Coupons	36%	41%	44%	40%	30%
Product information	41%	48%	49%	49%	27%
Invitations to events	41%	38%	38%	34%	26%
Tips and advice	n/a	41%	48%	45%	24%
Information about the company	32%	30%	35%	37%	24%
Feedback forums	32%	31%	34%	34%	20%
Industry information	n/a	30%	32%	30%	21%
None of these	n/a	n/a	n/a	26%	34%

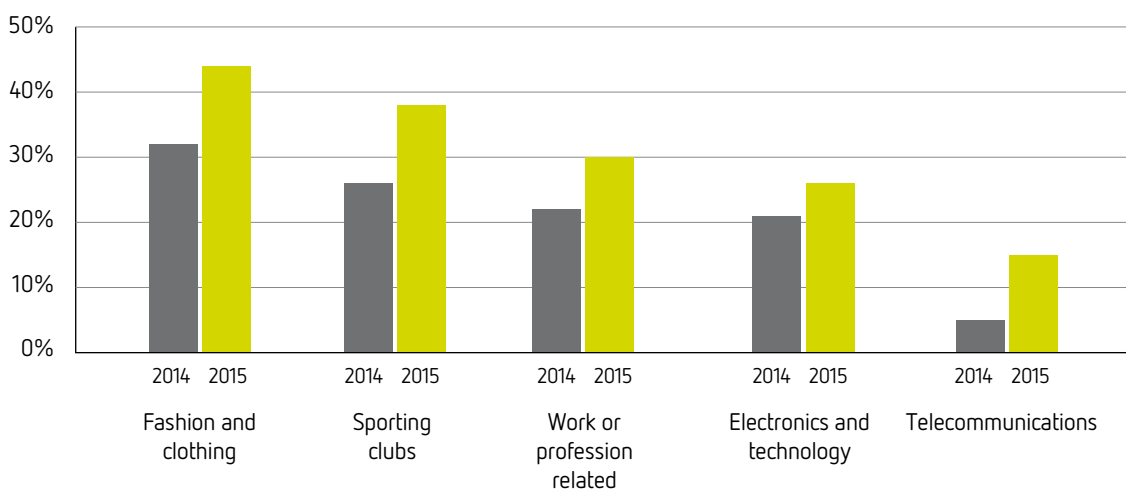
Base: Users of social media (539)

Q10b. Which of these things would you like to get from businesses or brands you might follow on social media?

Note: Could not find proportions who said 'none of these' prior to 2014

Among Facebook users, 30% follow brands or businesses on Facebook which is almost the same as last year (31%). The most commonly followed categories are fashion, sporting clubs and work-related sites which have increased their appeal since last year.

Types of brands/businesses followed on Facebook



Base: Use Facebook (505)

Q10e. Do you follow any particular brand or business on Facebook?

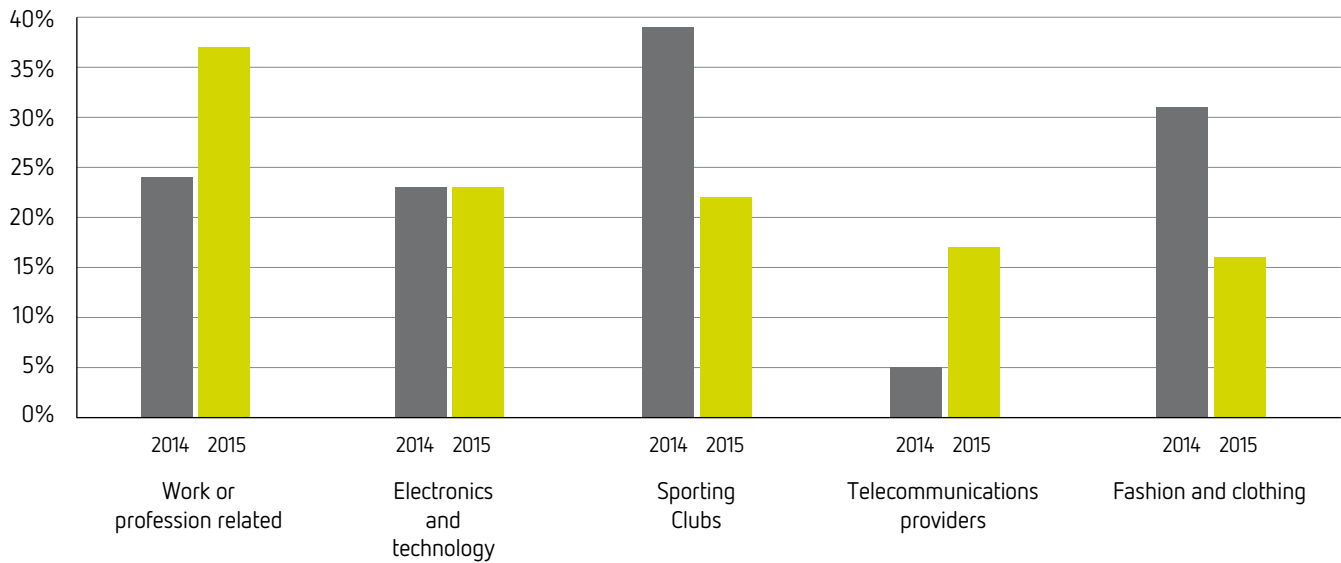
Q10f. What type of brands or businesses do you like to follow? (Base: Facebook users who follow brands on Facebook. n=150)

Notes: Multiple responses allowed for Q10f.

What do consumers want from businesses or brands they follow?

Among Twitter users, 23% follow brands or businesses which is similar to last year (26%). Most commonly followed categories are work-related, electronics, technology and sporting clubs.

Types of brands/businesses followed on Facebook



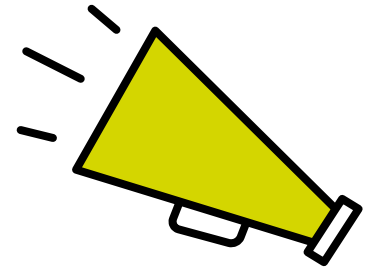
Base: Use Twitter (89)

Q10c. Do you follow any particular brand or businesses on Twitter?

Q10d. What type of brands or businesses do you like to follow? (Base: Twitter users who follow brands via Twitter. n=19)

Note: Multiple responses allowed for Q10d

Advertising on social networking sites



Attitudes towards advertising on social media are mixed. Some don't mind seeing ads (38%) and quite a few click on them occasionally to find out more (42%). However, most (55%) still take no notice of such ads (down from 69% last year), and ignore sponsored posts from businesses they don't follow (72%). A small number are open to a business' promotional efforts on social media whether direct advertising or sponsored posts but many display a less than favourable attitude towards such promotions.

Attitudes towards advertising on social network sites	Agree	Neutral	Disagree
I'm quite happy to see ads on social network sites	38%	23%	39%
I take no notice of the ads on social network sites	55%	20%	25%
I'm turned off by companies or brands that advertise on social network sites	31%	32%	37%
I sometimes click on ads I see on social network sites to find out more	42%	13%	46%
I like sponsored posts from businesses I follow on social networks	32%	26%	43%
I ignore sponsored posts from businesses I don't follow	72%	15%	14%

Base: Users of social networking sites (539)

Q12. 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?

Note: Rounding occurs

Provision of online ratings

Overall, about a quarter of social media users have provided online ratings which is slightly fewer than last year but in line with prior results. However, the average number of ratings provided has increased slightly from 9 to 14. Males and 30-39 year olds appear to be providing more ratings on average than other segments. Such ratings are most commonly given about experiences in hotels and motels, followed by restaurants and bars, stores and holiday destinations.

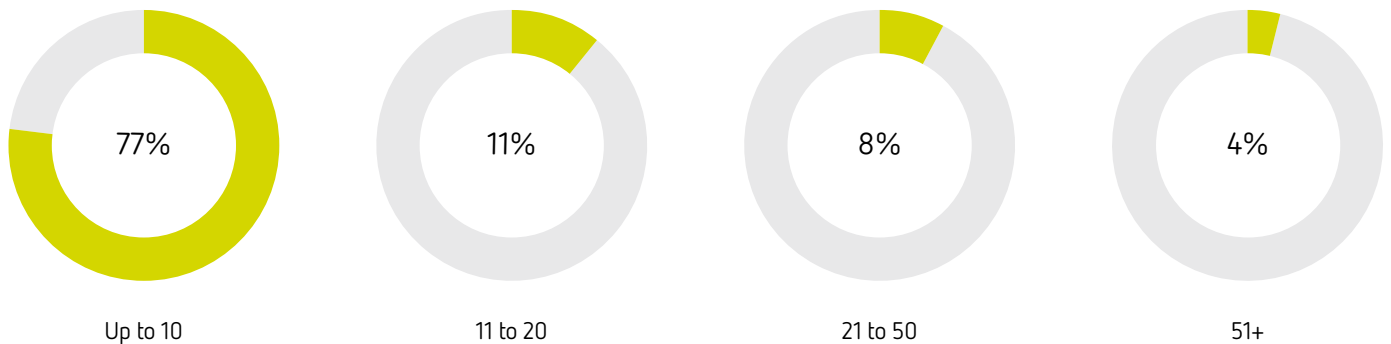
Proportion who have provided ratings online	2011	2012	2013	2014	2015
Total	27%	24%	25%	30%	24%
Male	28%	29%	29%	33%	25%
Female	26%	19%	21%	27%	24%
18 to 29	24%	28%	15%	32%	30%
30 to 39	26%	22%	31%	28%	28%
40 to 49	28%	18%	25%	28%	22%
50 to 64	31%	27%	27%	34%	27%
65+	24%	23%	27%	39%	14%

Proportion who have provided ratings online by location

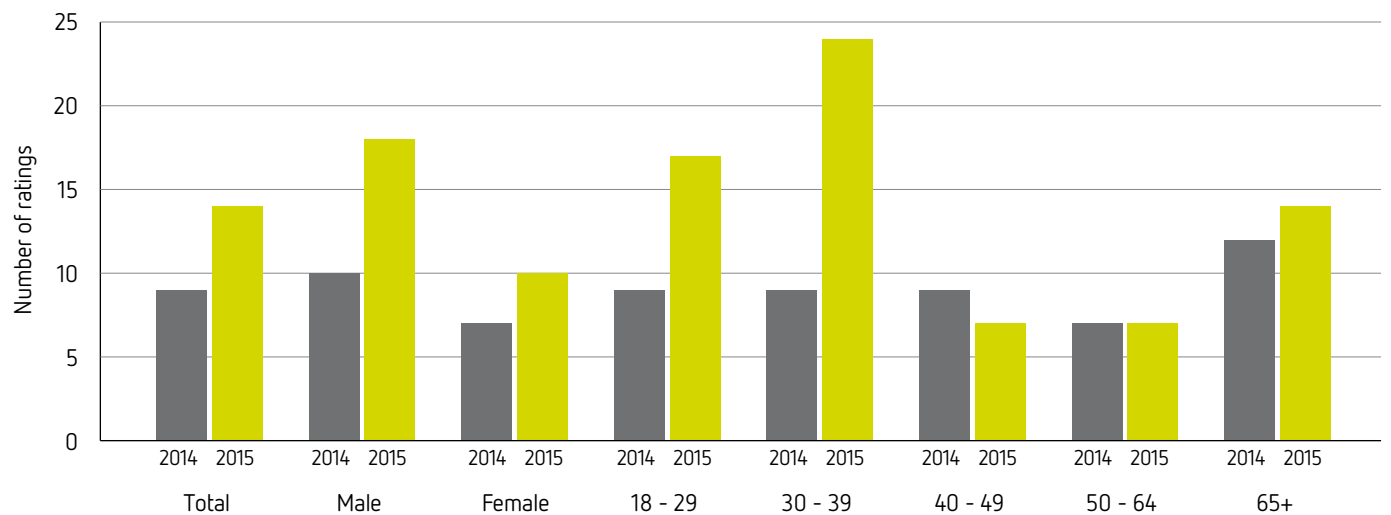
24%	Total
28%	New South Wales
20%	Victoria
26%	Queensland
21%	South Australia
21%	Western Australia
30%	Tasmania
25%	Northern Territory
31%	Australian Capital Territory
26%	Metropolitan
22%	Regional

Provision of online ratings

Number of ratings provided last year



Average number of ratings provided last year



Base: Access the internet (796). Note the 18-29 results prior to 2015 were actually for 20-29s.
 Q13a 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?
 Q13c. And, in the last year, how many times do you think you would have provided an online rating?
 Note: Rounding occurs

Products and services rated	2014	2015
Hotels and motels	25%	44%
Restaurants and bars	25%	33%
Stores	19%	31%
Holiday destinations	22%	26%
Movies	13%	15%
Mobile apps	12%	16%
Bands and music	5%	12%

Base: Ever provide online ratings (109)
 Q13b. For what types of products or services have you provided online ratings? (All other responses less than 5%)

Use of online reviews or blogs

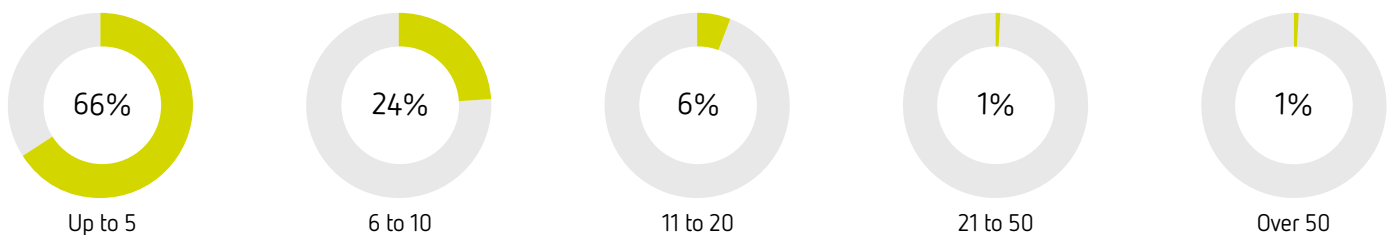
The majority of Australian internet users (55%) read online reviews or blogs. This is less than last year. Young people aged below 30 and those in the ACT or SA are more avid readers of such reviews. Most readers look at up to 5 reviews before making a decision.

Proportion who have read online reviews or blogs	2011	2012	2013	2014	2015
Total	63%	68%	74%	67%	55%
Male	65%	73%	77%	73%	55%
Female	61%	64%	71%	61%	55%
18 to 29	75%	80%	80%	70%	67%
30 to 39	65%	65%	76%	77%	64%
40 to 49	72%	73%	76%	68%	55%
50 to 64	56%	57%	68%	60%	53%
65+	44%	73%	65%	53%	35%

Proportion who have read online reviews or blogs

55%	Total
58%	New South Wales
55%	Victoria
53%	Queensland
61%	South Australia
43%	Western Australia
58%	Tasmania
55%	Northern Territory
70%	Australian Capital Territory
55%	Metropolitan
55%	Regional

Number of review respondents expect to read before making a decision



Base: Access the internet (796). Note the 18-29 results prior to 2015 were actually for 20-29s.
 Q14a Do you ever read online reviews or blogs to find out what other people think about products or services you might be interested in?
 Q14b. Approximately how many reviews would you expect to read before you make a decision? (Base: Those who look at online reviews n=435)
 *Note: Rounding occurs

Posting of online reviews or blogs

Some 27% of internet users claimed to have posted reviews or blogs and this finding has remained consistent since 2011. Reviewers were more likely to be aged below 65 and live in the more populated states – NSW, ACT, Victoria, and Queensland. The main products or services reviewed are experiences at hotels and motels or restaurants, bars and cafes and the average number posted in the last year was 7, compared to 9 in 2014. If the business in question responds to a bad review, nearly two thirds claimed their opinion may change – 31% said it would and another 31% said maybe. This is similar to prior findings.

Proportion who post online reviews or blogs	2011	2012	2013	2014	2015
Total	24%	24%	28%	28%	27%
Male	26%	31%	32%	34%	27%
Female	21%	17%	25%	22%	28%
18 to 29	23%	23%	25%	25%	31%
30 to 39	29%	24%	32%	35%	34%
40 to 49	21%	19%	39%	35%	27%
50 to 64	25%	28%	30%	30%	30%
65+	21%	22%	34%	20%	14%

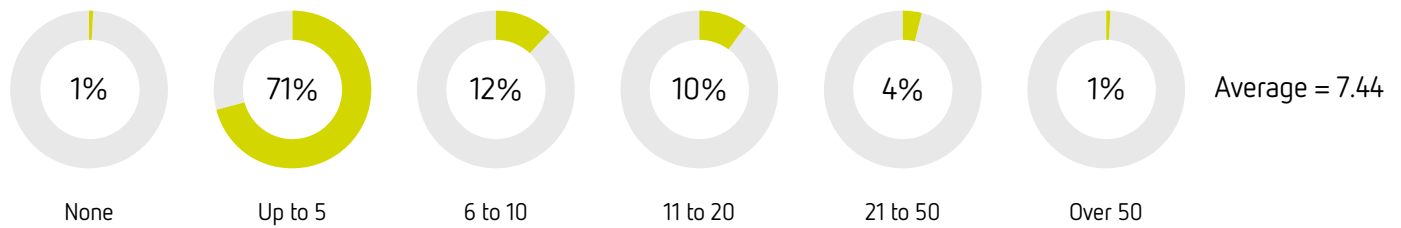
Proportion who post online reviews or blogs

27%	Total
33%	New South Wales
28%	Victoria
28%	Queensland
20%	South Australia
16%	Western Australia
15%	Tasmania
21%	Northern Territory
26%	Australian Capital Territory
29%	Metropolitan
24%	Regional

Base: Access the internet (796). Note the 18-29 results prior to 2015 were actually for 20-29s. Q14c. Have you ever posted an online review or blog, where you provide your thoughts or opinions on products, services, entertainment and so forth?

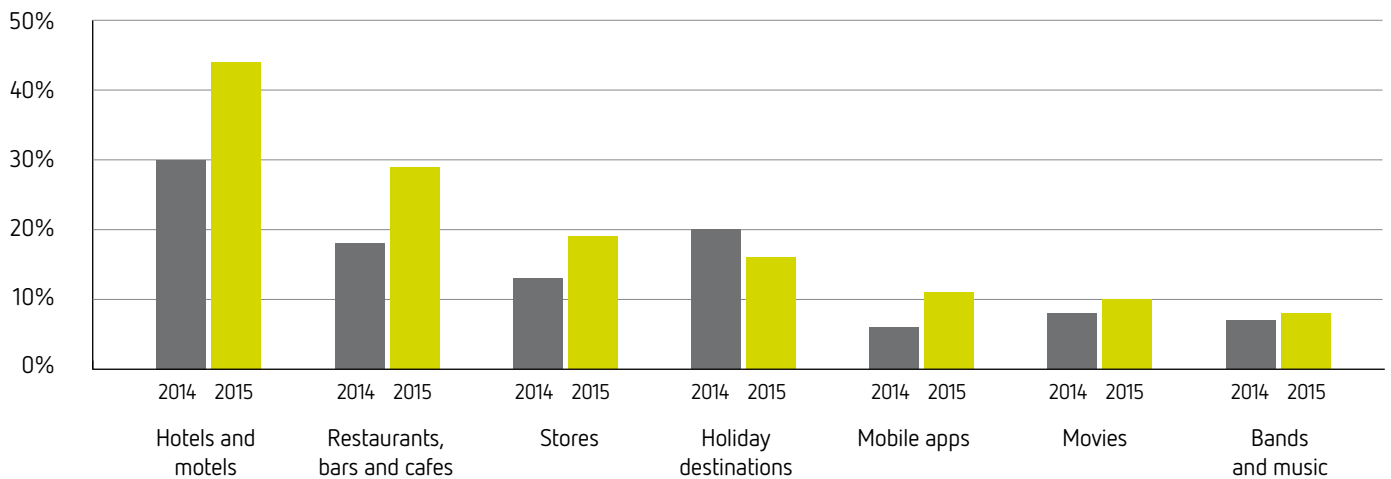
Posting of online reviews or blogs

Number of reviews provided last year



Base: Ever provide online reviews (194)
Q14f. And, in the last year, how many times do you think you would have posted an online review or blog?

Products and services reviewed



Base: Ever provide online reviews (194)
Q14d. For what types of products or services have you provided online reviews or blogs? All other responses less than 5%.

Might change opinion if business responds to feedback on social media

Might change opinion if business responds to feedback on social media	Yes	No	Maybe
Total	31%	39%	31%
Male	35%	41%	24%
Female	27%	36%	37%
18 to 29	46%	35%	18%
30 to 39	32%	38%	30%
40 to 49	22%	47%	31%
50 to 64	23%	33%	44%
65+	21%	49%	30%

Base: Ever provide online reviews (194). Note the 18-29 results prior to 2015 were actually for 20-29s.
Q14e. If a business gets back to you after you have posted a bad review, would that change your opinion?

Section 2:

Australian businesses and social media

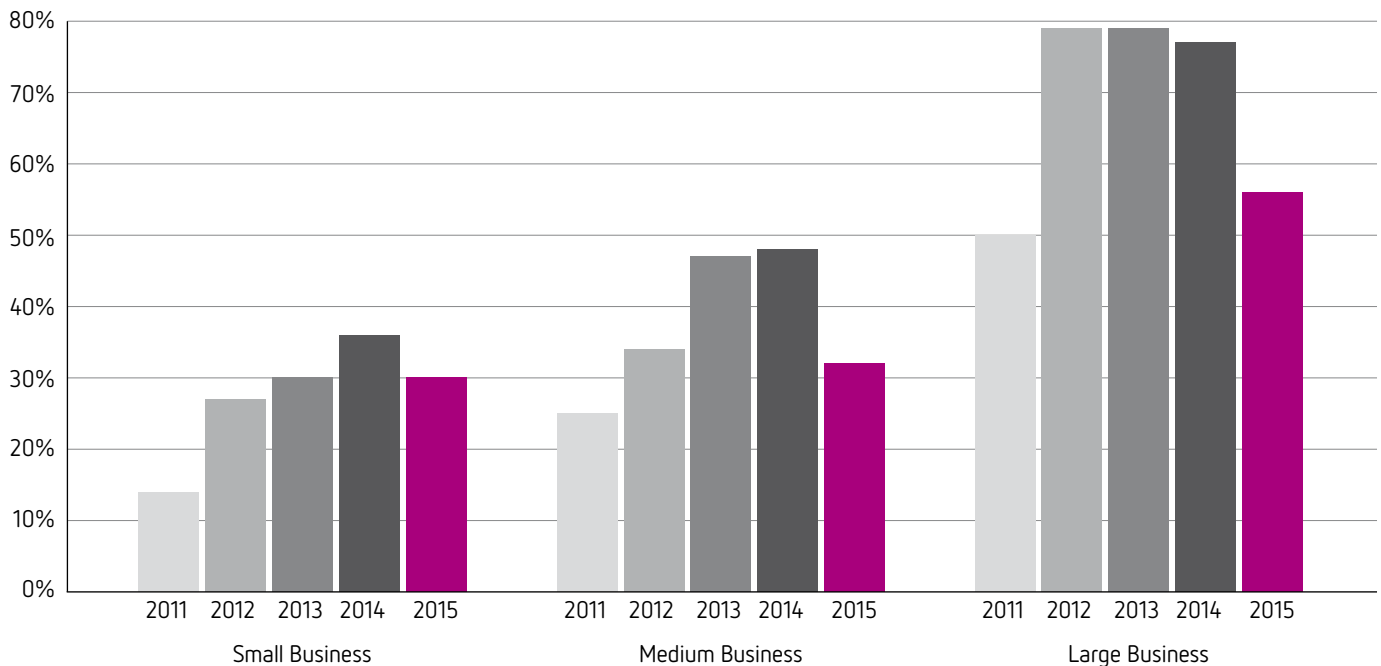
Use of social media - summary	48
(by business category (small to medium)).....	50
(by location (small to medium))	51
Uses of social media.....	52
Advertising on social media sites	54
Who is responsible for a business' social media presence?	55
How often do businesses update their social media?	56
How is traffic driven to a business' social media presence?	57
Business investment in social media	58
Percentage of marketing budget allocated to social media.....	59
How businesses measure success of their social media investment.....	60
Do businesses have a strategic plan for social media?.....	62
Social media and business performance in SMEs	63
Expectations for the next 12 months.....	64
About Sensis	65

Use of social media - summary

A large number of businesses have a social media presence although the prevalence has declined slightly compared to last year. Facebook is still the most popular platform while LinkedIn and Twitter also play an important role for numerous businesses of all sizes. Google+ and YouTube are used by a greater proportion of large businesses than SMEs but similar numbers use Instagram, Pinterest and blogs.

Only 2% of small businesses and 5% of medium businesses, and no large businesses, claimed to have removed a social media presence. This was primarily because it took too much time or did not provide a return on investment.

Proportion of businesses that have social media presence



Base: All businesses: Small: n=793. Medium: n= 207. Large: n=100.

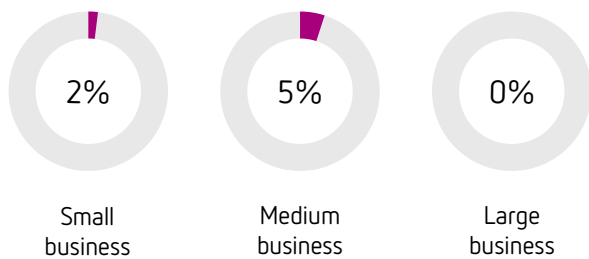
QB1a. Does your business have a social media presence? This might include having a Facebook page, being active on Twitter, MySpace or LinkedIn, having a blog, hosting forums or having a social media based rating system?

Use of social media - summary

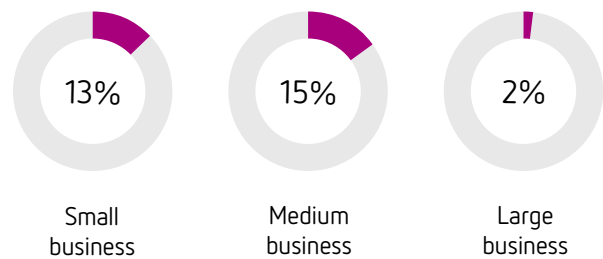
Social media presence includes:	Small	Medium	Large
Facebook	94%	89%	89%
Twitter	17%	38%	46%
LinkedIn	19%	19%	36%
Google+	9%	4%	20%
YouTube	8%	6%	23%
Instagram	11%	13%	11%
Pinterest	3%	2%	4%
Blog	6%	8%	7%

Base: All businesses with social media presence: Small: n=234. Medium: n= 68. Large: n=56.
 QB2. What does your social media presence include?

Proportion of businesses that have removed a social media presence in the past year



Proportion of businesses that intend to get a social media presence in the next year

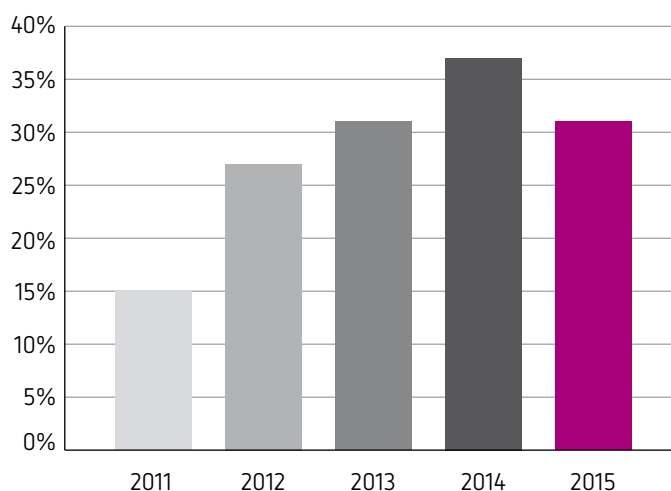


Base: Do not have social media presence Small: n=559. Medium: n= 139. Large: n=44
 QB1b. Has your business had a social media presence in the past?
 QB1d. Are you planning on getting a social media presence in the next 12 months?

Use of social media by business category (small to medium)

The personal services and hospitality sectors remain the most active in terms of social media use closely followed by health services and retail trade. Social media use is lowest in the manufacturing and building and construction sectors. The table below indicates some variation in results relative to last year for most sectors.

Proportion of SMEs with social media presence - Total



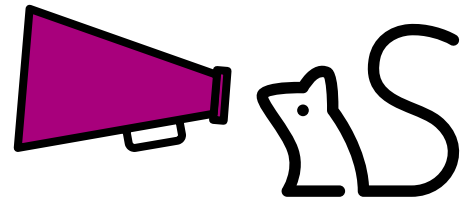
Proportion of SMEs with social media presence	2011	2012	2013	2014	2015
Total	15%	27%	31%	37%	31%
Cultural, recreational and personal services	41%	58%	60%	59%	49%
Accommodation, cafes and restaurants	33%	47%	54%	59%	45%
Health and community services	4%	23%	23%	26%	42%
Retail trade	14%	30%	32%	50%	41%
Wholesale trade	13%	27%	44%	21%	32%
Transport and storage	18%	23%	17%	13%	32%
Finance and insurance	10%	13%	18%	26%	29%
Communication, property and business services	14%	30%	27%	44%	24%
Manufacturing	9%	16%	18%	26%	19%
Building and construction	5%	10%	25%	19%	19%

Base: All SMEs: Small: n=793. Medium: n= 207.

QB1a. 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 to medium)

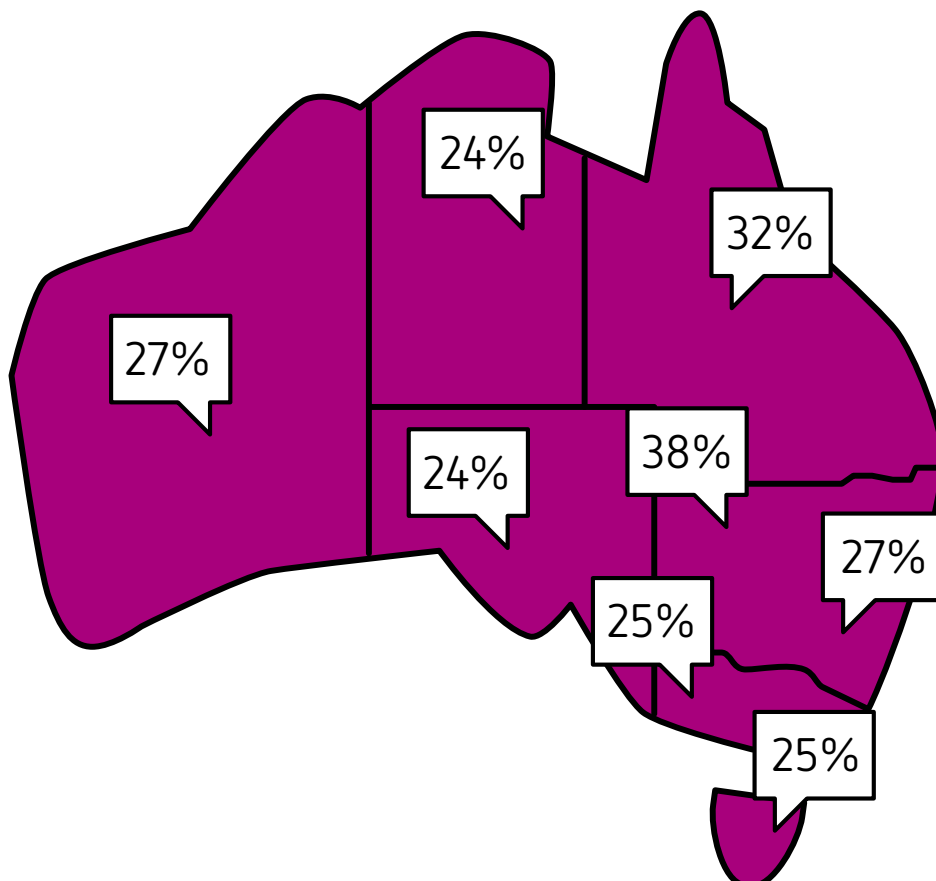
Social media presence is above average in NSW and about average in Queensland but below average elsewhere. There is little difference between metropolitan and regional SMEs but social media presence appears to have dropped in all locations bar NSW.



Proportion of SMEs that have a social media presence	2011	2012	2013	2014	2015
Total	15%	27%	30%	37%	31%
New South Wales	14%	30%	32%	36%	38%
Victoria	14%	23%	27%	31%	25%
Queensland	20%	28%	31%	48%	32%
South Australia	11%	25%	32%	35%	24%
Western Australia	14%	30%	34%	35%	27%
Tasmania	12%	28%	33%	41%	25%
Northern Territory	15%	30%	23%	35%	24%
Australian Capital Territory	20%	34%	31%	43%	27%
Metropolitan	15%	29%	29%	35%	30%
Regional	15%	25%	35%	40%	31%

Base: All SMEs: Small: n=793. Medium: n= 207.

QB1a. 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?

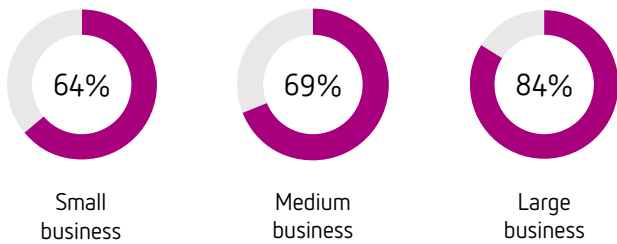


Uses of social media

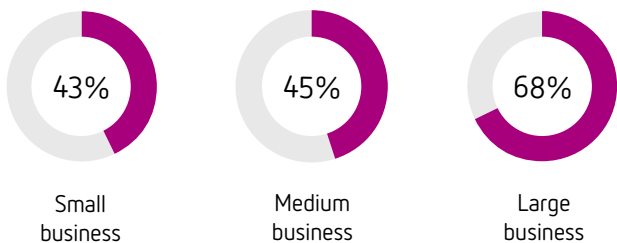
The most common use of social media for businesses is to have a two way communication system. A majority of businesses use it for this purpose, an increase from 2014.

It is also used as a customer feedback mechanism. Over a third of SMEs and most large businesses invite customers to provide comments, ratings and reviews but to a lesser degree than previously observed. Similar proportions also engage with those who provide such feedback about the business.

Despite discounts and coupons being a key reason that consumers connect with businesses on social media, only a quarter of SMEs and 30% of large businesses offer this. Fewer businesses now offer such incentives but the most common ones offered are still discounts and giveaways.

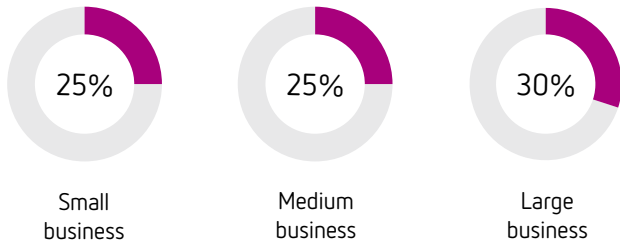


Use social media for two-way communication with clients and contacts	2012	2013	2014	2015
Small	50%	54%	45%	64%
Medium	55%	62%	55%	69%
Large	74%	75%	65%	84%

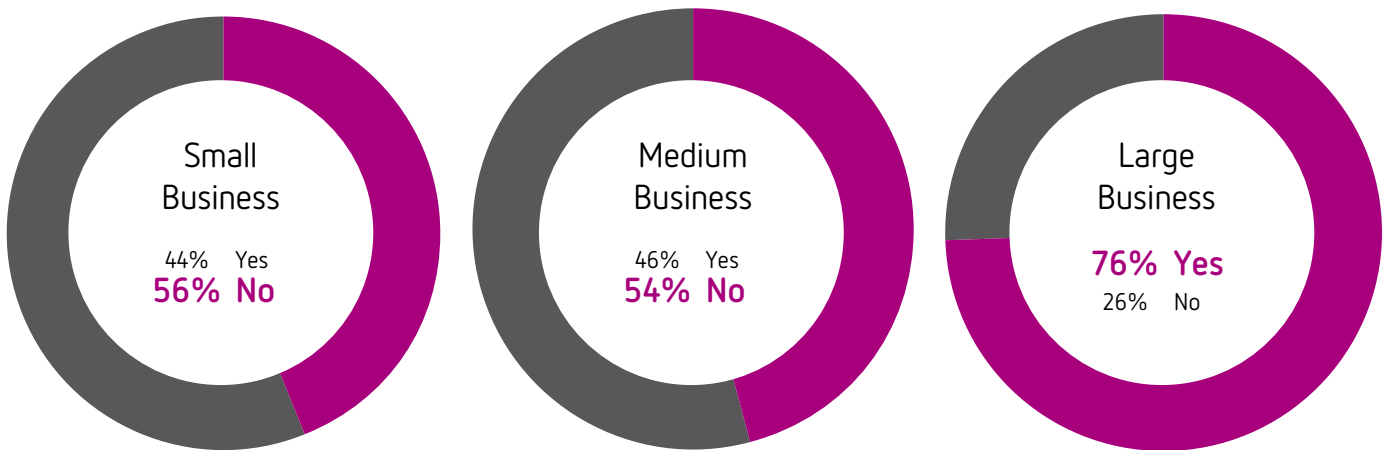


Invite online comments, ratings and reviews on social media sites	2012	2013	2014	2015
Small	55%	56%	46%	43%
Medium	56%	58%	59%	45%
Large	86%	73%	53%	68%

Uses of social media



Offer incentives to consumers via social media	2012	2013	2014	2015
Small	34%	28%	28%	25%
Medium	27%	33%	43%	25%
Large	35%	38%	41%	30%



Engage with people who provide feedback about your business on ratings & reviews on social media*	Small	Medium	Large
Yes	44%	46%	74%
No	56%	54%	26%

Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56.
 QB6a. Do you use your social media channels to engage in two-way communication with your customers and contacts?
 QB15. Do you offer incentives to consumers via your social media presence? What sort of incentives do you offer?
 QB17. Do you invite online comments, ratings or reviews on your business or products?
 QB18. Do you engage with people who provide feedback about your business on ratings and reviews on social media sites?*

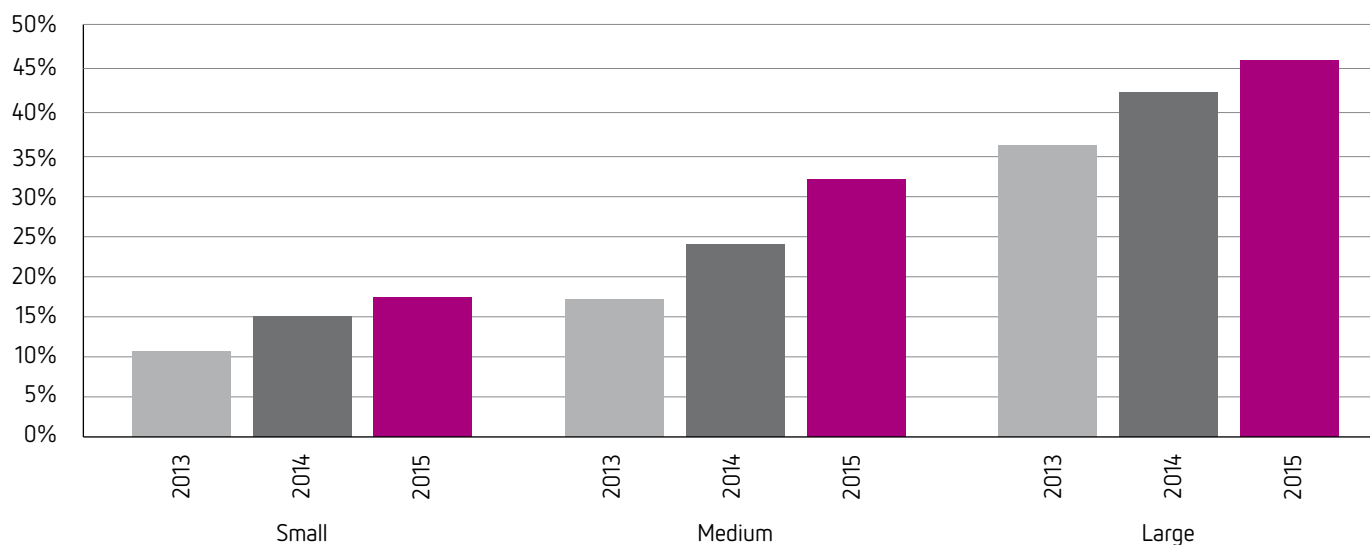
* Note: Question not reported on in previous years hence no comparison available.

Advertising on social media sites

It is clear that paying for advertising on social media sites correlates with business size but this has become more common across the board since 2013. Nevertheless, use of paid advertising is still in the minority for all business sizes. Most advertise on Facebook, with LinkedIn and Twitter not really being used by SMEs and only by some large businesses.

Most businesses paying to advertise on social media channels found the advertising effective, however, larger businesses were more likely to report an effective campaign than SMEs.

Proportion of businesses that have paid to advertise on a social media channel



Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56.
QB4c. Have you paid to advertise on a social media channel?

What channel did you pay to advertise on?	Small	Medium	Large
Facebook	87%	84%	96%
LinkedIn	2%	2%	19%
Twitter	-	2%	15%

Base: Have paid to advertise on a social media channel. Small: n=50. Medium: n= 20. Large: n=26.
QB4c. What channel did you pay to advertise on?

Proportion that found paying to advertise on the channel effective	Small	Medium	Large
Facebook	67%	46%	88%

Base: Have paid to advertise on a social media channel. Small: n=50. Medium: n= 20. Large: n=26.
QB4d. Was that effective for your business?

Who is responsible for a business' social media presence?

Nearly all businesses manage their social media presence internally with less than one in ten outsourcing. Among those few who outsource, a mixture of specialist social media and communications, PR or media agencies are used.

In medium and large businesses, this responsibility sits more often with the marketing department but now there are more large businesses turning to the communications department to drive their social media strategy.

For small businesses, the owner or manager is almost invariably responsible for the social media presence but some leave it to

Is your social media...	Small	Medium	Large
Managed internally?	91%	85%	89%
Outsourced?	5%	8%	0%
A combination of internal and outsourced?	4%	8%	11%

Small business	2011	2012	2013	2014	2015
Business owner or manager	82%	79%	72%	76%	76%
Marketing department	10%	10%	11%	12%	15%
IT department	2%	5%	10%	6%	3%
Communications department	2%	3%	4%	4%	2%
External firm	4%	3%	3%	2%	2%

Medium business	2011	2012	2013	2014	2015
Marketing department	52%	44%	43%	56%	63%
Business owner or manager	36%	36%	40%	25%	23%
IT department	6%	13%	7%	8%	9%
External firm	6%	0%	3%	2%	3%
Communications department	0%	8%	8%	9%	1%

Large business	2011	2012	2013	2014	2015
Marketing department	74%	64%	66%	77%	61%
Communications department	0%	17%	10%	13%	30%
Business owner or manager	17%	10%	8%	4%	7%
IT department	0%	5%	3%	4%	2%
External firm	1%	0%	3%	2%	0%

Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
 QB7a. Is your social media managed internally or outsourced?
 QB7b. What type of external firm is it outsourced to?
 QB8. Which area of your business has overall responsibility for your social media presence?

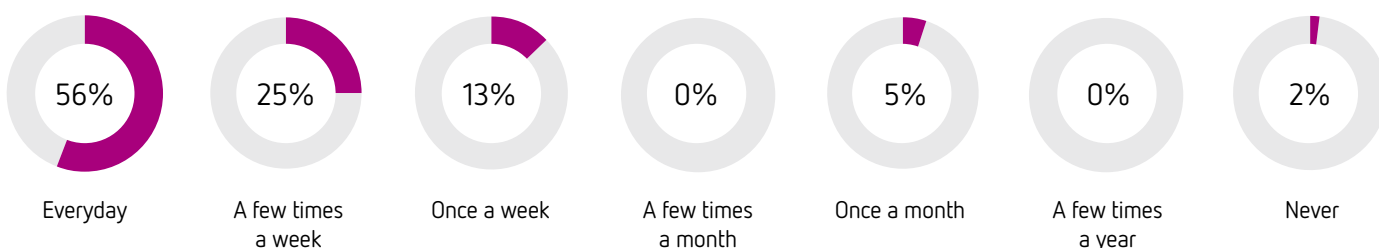
Majority of all business manage their social media internally



How often do businesses update their social media?

Larger businesses tend to update their social media status more frequently. Daily updates are more common for larger businesses but most SMEs are updating at least weekly. This has been fairly consistent since 2012.

Large Businesses 2015



Small business	2012	2013	2014	2015
Everyday	22%	18%	20%	20%
A few times a week	15%	17%	13%	21%
Once a week	28%	24%	22%	29%
A few times a month	9%	11%	13%	8%
Once a month	9%	13%	18%	11%
A few times a year	9%	14%	11%	6%
Never	8%	4%	3%	5%

Medium business	2012	2013	2014	2015
Everyday	39%	36%	42%	34%
A few times a week	12%	15%	21%	27%
Once a week	19%	24%	16%	12%
A few times a month	7%	4%	7%	10%
Once a month	12%	6%	6%	9%
A few times a year	5%	10%	6%	4%
Never	6%	6%	3%	4%

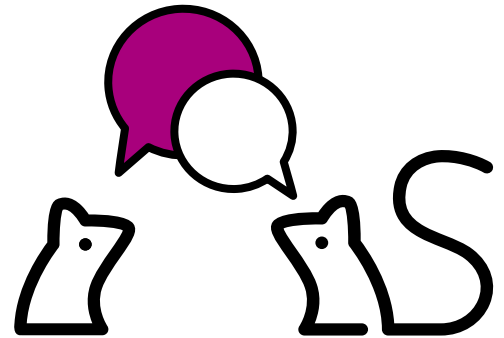
Large business	2012	2013	2014	2015
Everyday	60%	65%	65%	56%
A few times a week	18%	11%	25%	25%
Once a week	10%	10%	8%	13%
A few times a month	2%	5%	0%	0%
Once a month	7%	4%	0%	5%
A few times a year	3%	1%	2%	0%
Never	2%	4%	0%	2%

Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
 QB5. How often do you monitor or update your social media presence?

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

Nearly all SMEs (92%) and large businesses (82%) with a social media presence have a strategy to drive people to their sites. Some have an advertising presence, which is more common for larger businesses, or use directories.

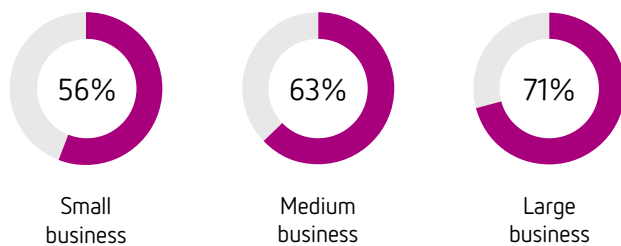
Also, a majority of businesses have buttons on their website allowing people to share information about the business through their social media profiles which facilitates efforts to increase their brand presence.



Means of driving traffic to social media presence	Small	Medium	Large
Have links on our website to our social media site	66%	66%	63%
Like, follow and subscribe to other's social media sites	38%	48%	48%
Advertise our social media presence on other websites	13%	23%	27%
Advertise our social media presence in traditional media	14%	19%	25%
Include links in directories	16%	14%	16%
None – no strategy to drive traffic	9%	7%	18%

Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
QB9a. How do you drive traffic to your social media presence?

Have buttons on website to help people share info on their social media



Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
QB9b. Do you include social media buttons on your website to help people share information about your business on their social media presence?

Business investment in social media

Many businesses with a social media presence have made some financial investment but quite a few respondents didn't know, similar to previous years.

Among those who quoted a dollar figure, the average amount spent has increased for small businesses but is significantly lower for medium and large businesses compared to last year.

Businesses are spending more per annum on average on social media



Annual budget on social media	Small	Medium	Large
Nothing	1%	-	-
Up to \$500	9%	4%	18%
\$501 to \$1000	7%	4%	7%
\$1001 to \$5000	12%	17%	13%
\$5001 to \$10000	5%	9%	9%
\$10001 to \$50000	4%	18%	2%
Over \$50000	1%	4%	5%
Don't know / refused	61%	45%	46%

Average budget	2011	2012	2013	2014	2015
Small	\$2,050	\$3,410	\$1,970	\$4,560	\$5,869
Medium	\$6,500	\$16,920	\$11,780	\$38,800	\$18,098
Large	\$78,750	\$100,480	\$79,710	\$33,050	\$10,088

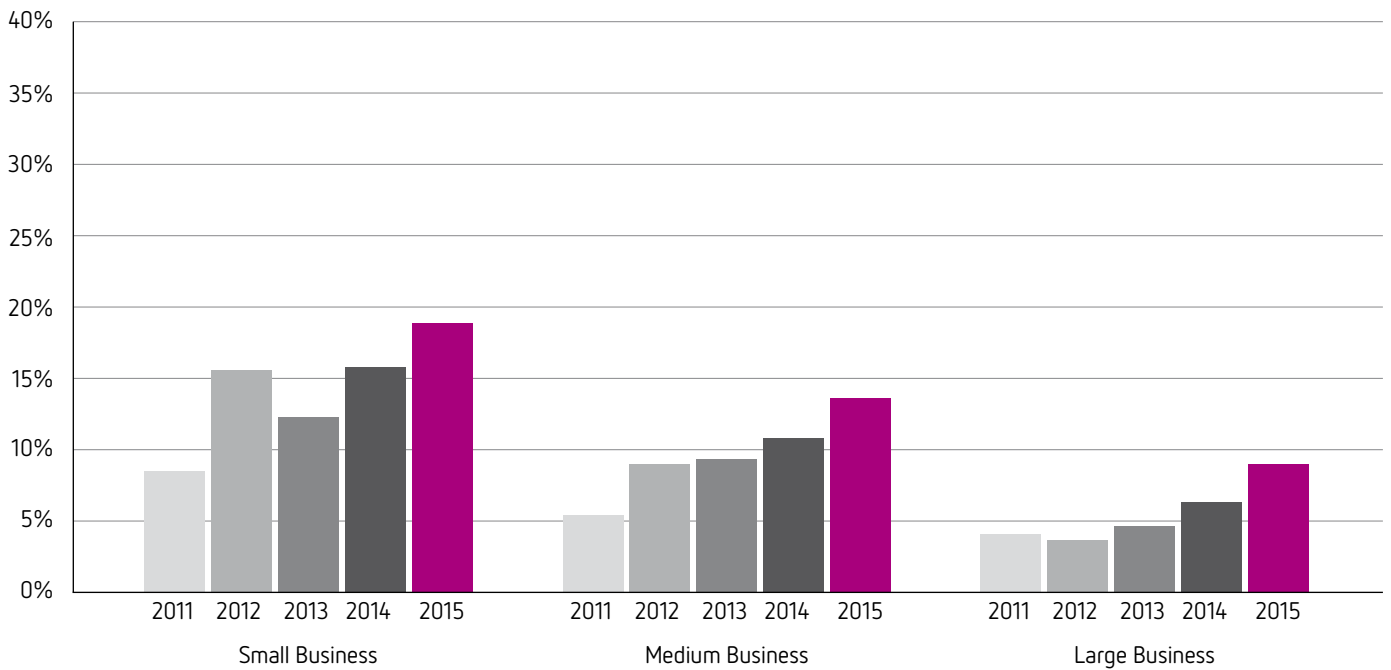
Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
 QB3. Approximately, what is your current investment in social media? What do you spend a year?
 Note: Rounding occurs

Percentage of marketing budget allocated to social media

Many didn't know about their business' marketing spend on social media but of those who provided a percentage estimate we can see the average percentage figure for all business sizes has gradually increased over the past few years.

Percentage of marketing budget allocated to social media	Small	Medium	Large
Up to 10%	27%	41%	48%
11% to 20%	3%	5%	11%
21% to 50%	8%	5%	4%
Over 50%	3%	2%	-
Don't know / refused	59%	47%	37%

Average proportion of marketing budget



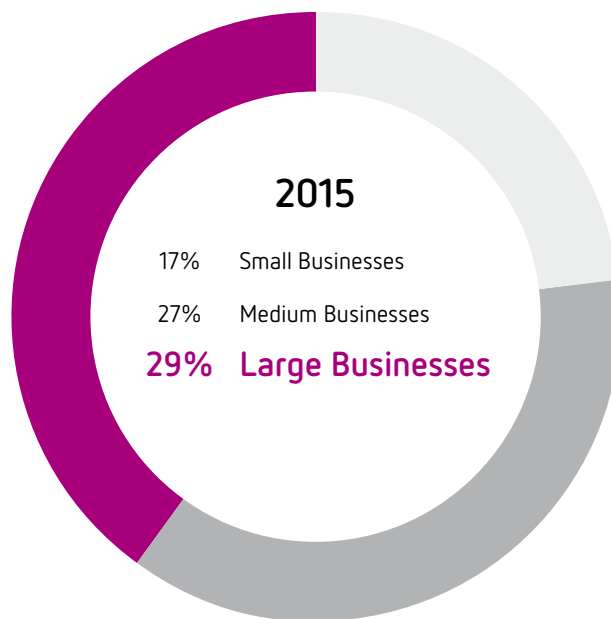
Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
 QB4a. Approximately what percentage of your marketing budget is allocated to social media?

How businesses measure success of their social media investment

Only a minority of businesses measure their social media ROI and this is more common for medium and large businesses. Those who do monitor this business activity tend to look at response numbers, sources of brand awareness and sales. Some use automated analytical tools to assist with this task.

Most could not quote a percentage figure estimating what their return has been so far but for those who knew, around 12% in each segment estimated their return was above 10%.

An assessment of what constitutes a successful social media strategy is somewhat subjective but most businesses look at the number of people engaging with them and also try to measure its impact on the bottom line.



Proportion of businesses that measure ROI for social media	2012	2013	2014	2015
Small	28%	25%	17%	17%
Medium	24%	28%	28%	27%
Large	39%	51%	38%	29%

How businesses measure social media ROI	Small	Medium	Large
Monitor number of responses on social media	64%	44%	69%
Asking customers how they found you	47%	25%	56%
Third party statistics provider	10%	9%	13%
New sales	10%	29%	19%
Online, automated and analytical tools	13%	26%	50%
Specific deals for social media customers	4%	-	29%
Saving a customer	4%	-	13%

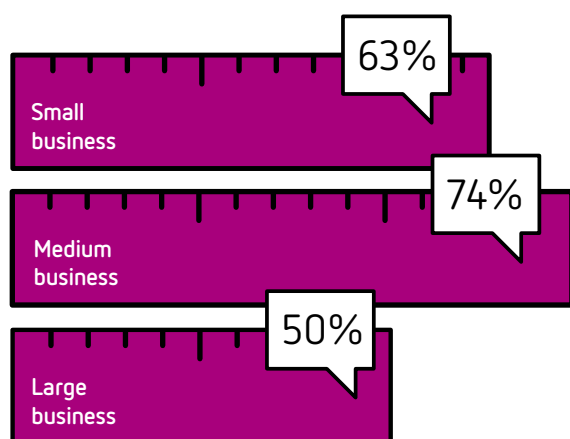
Base: Measures social media ROI. Small: n=44. Medium: n= 20*. Large: n=16*
 Q11a. How do you measure the return on investment into social media...?
 Note: *Small sample size for Medium and Large business samples

How businesses measure success of their social media investment

Return on social media investment	Small	Medium	Large
Have not yet recovered investment	10%	-	13%
Under 5%	8%	20%	6%
6% to 10%	10%	1%	31%
11% to 20%	3%	4%	-
21% to 50%	10%	-	6%
Over 50%	1%	13%	6%
Don't know	57%	61%	38%

Base: Measures social media ROI. Small: n=44. Medium: n= 20*. Large: n=16*
 Q11b. And what do you estimate the return on your investment in social media has been...?
 Note: *Small sample size for Medium and Large business samples

Measure by number of likes, followers and subscribers

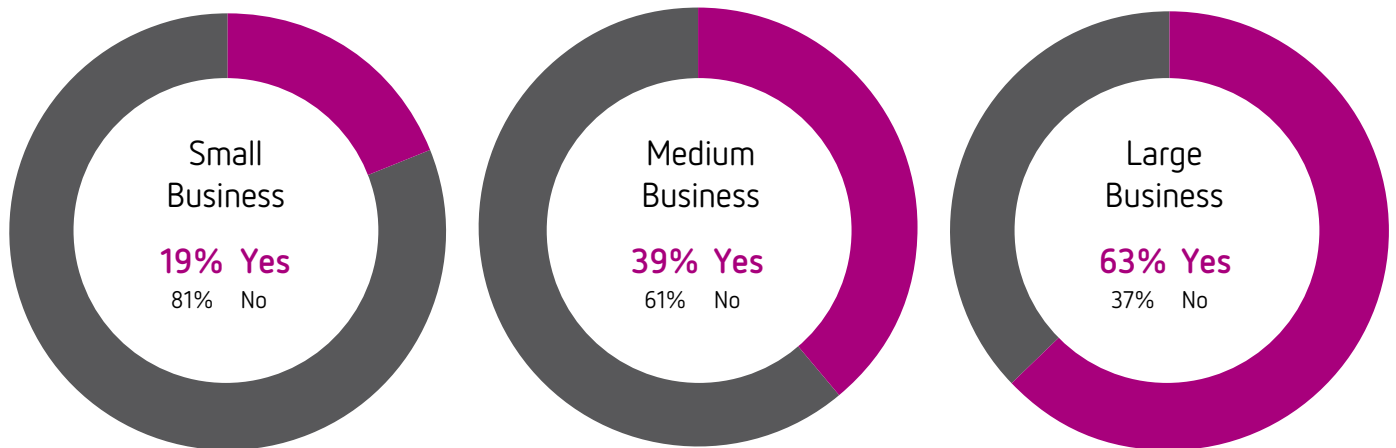


How businesses measure the success of their social media investment	Small	Medium	Large
Number of likes, followers and subscribers	63%	74%	50%
Sales, revenue and profits	30%	55%	56%
Positive conversations on social media	9%	13%	25%
Usage	4%	14%	38%
Klout score	-	10%	-
Take up of incentives and offers	-	13%	31%
Brand sentiment	2%	10%	13%

Base: Measures social media ROI. Small: n=44. Medium: n= 20*. Large: n=16*
 Q11b. And what do you estimate the return on your investment in social media has been...?
 Note: *Small sample size for Medium and Large business samples

Do businesses have a strategic plan for social media?

Most SMEs do not have a social media strategy although a plan is more common as business size increases.



Developed a strategic plan in your business for social media?*	Small	Medium	Large
Yes	19%	39%	63%
No	81%	61%	37%

Base: All businesses with a social media presence or planning on getting one in the next 12 months: Small n=305. Medium: n=87. Large: n=57.
 QB19. And have you developed a strategic plan in your business for your social media?
 Note: * Question not reported on in previous years hence no comparison available.

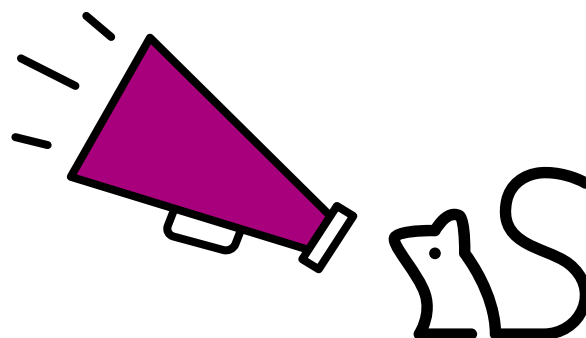
Social media and business performance in SMEs

While SMEs have their own measures of success for social media strategies, it is interesting to compare SMEs with a social media presence against those without on a wide range of economic indicators.

The March 2015 Sensis Business Index found 49% of SMEs were confident about their business prospects for the year ahead (similar to the November 2014 result of 51%). However, slightly more SMEs with a social media presence indicated confidence (54%) than those who do not use social media (47%).

Performance across key indicators was also higher in SMEs with a social media presence, as illustrated in the table below, and this was also true last survey.

Furthermore, a significantly greater proportion of SMEs using social media are actively seeking business growth in the future and their social media strategy is most likely an important component of this desired growth.



Business performance indicator	SMEs with a social media presence	SMEs without a social media presence
Proportion reporting confidence	54%	47%
Proportion reporting increased sales	35%	28%
Proportion reporting increased profitability	32%	20%
Proportion reporting increased employment	15%	9%
Proportion seeking significant or moderate growth in their business	56%	29%
None – no strategy to drive traffic	9%	18%

QB19. And have you developed a strategic plan in your business for your social media?
 Base: SMEs with a social media presence (n=302). SMEs without social media presence (n=698)

Expectations for the next 12 months

Although many businesses don't plan to change their expenditure on social media in the year to come, there are still quite a few who expect their spending will increase and they clearly outweigh those planning to spend less. The table below indicates the net balance figure for various business sizes is very positive (+18 for small, +13 for medium and +14 for large businesses).

Most still expect their social media investment will contribute to an increase in sales in the next year. The average expected increase ranges from 9% for small businesses to just over 15% for large business.

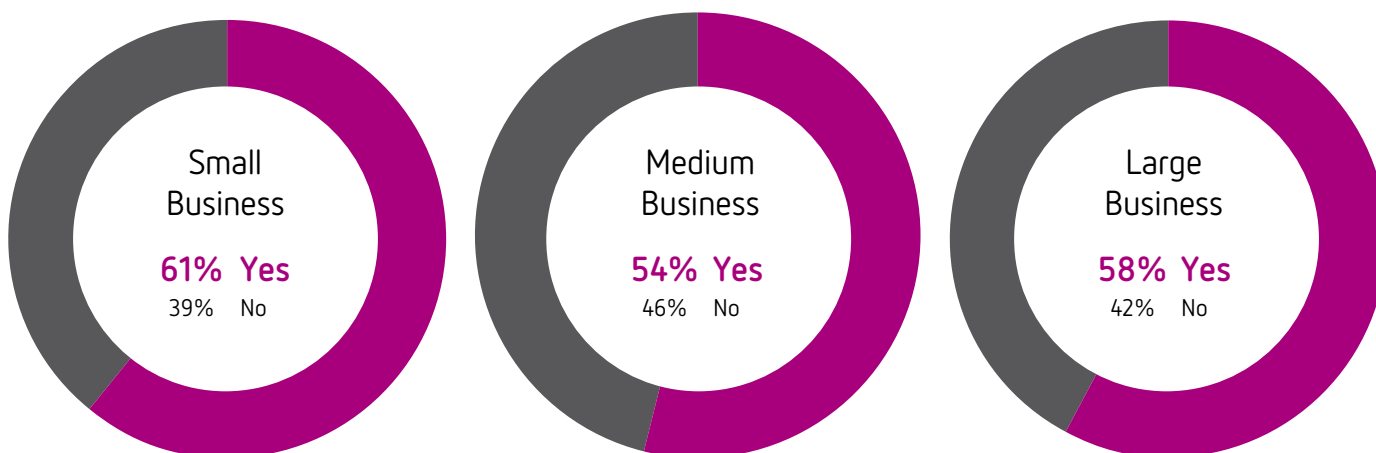
61% of small businesses believe that social media investment will contribute to an increase in sales



Expectations for social media expenditure	Small	Medium	Large
Spend more	23%	20%	14%
Spend the same	47%	48%	71%
Spend less	5%	7%	-
Net Balance*	+18	+13	+14
Don't know or refused	26%	25%	15%

Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
 QB12 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?
 Note: *Net balance = those expecting to spend more minus those expecting to spend less

Do businesses believe that social media investment will contribute to an increase in sales?



Average expected increase	2012	2013	2014	2015
Small	16.6%	12.2%	18.0%	15.3%
Medium	5.8%	11.7%	5.9%	10.4%
Large	8.4%	8.8%	8.7%	9.1%

Base: All businesses with a social media presence: Small: n=234. Medium: n= 68. Large: n=56
 QB13. Do you believe that your social media investment will contribute to an increase in sales in the next 12 months?

About Sensis

As Australia's #1 marketing services company, we're here to engage consumers with Australian businesses. We make this happen through a number of leading brands - Yellow Pages, White Pages, TrueLocal, Whereis and Skip and our expert digital know-how. Our digital expertise is what sets us apart - we give businesses a competitive edge through websites, search engine marketing and optimisation, data, and through our digital advertising agency, Found.

*TrueLocal is an unregistered trade mark of Australian Local Search Pty Ltd (ABN 68 109 826 351)

Sensis Pty Ltd
222 Lonsdale Street, Melbourne VIC 3000
Tel: + 61 3 8653 5000 | Twitter: @Sensis | www.sensis.com.au