

2013

Mid-South Digital Engagement Survey



Research Dynamics, Inc.



OBSIDIAN
PUBLIC RELATIONS

Project Background

- In 2011, Obsidian and Research Dynamics came together to conduct the first-ever quantitative survey examining social media usage in the Mid-South.
- That survey, which was landline based, was repeated in 2012.
- 2013's survey was conducted online and was broader in nature – measuring various types of “digital engagement” among Mid-Southerners, including social media, app and website usage.

Methodology

- On June 24, 2013, area residents were invited to take the 2013 Mid-South Digital Engagement Survey by visiting the website DigitalMidSouth.com.
- Respondents were qualified for participating in this survey by living in a Mid-South county and by participating in digital engagement, such as social media, website or app use.
- By the cutoff date of July 5, 2013, a total of 221 people completed the entire survey.
- The margin of error for this survey is +/- 7 points, meaning that if all Mid-South residents who participate in digital engagement had completed this survey, in 95 out of 100 cases, the results would differ by no more than 7 points in either direction from the results of the 221 people who completed this survey.

Digital Engagement Profile

76% participate in digital engagement more than a few times a day.



60% visit social media sites more than a few times a day.



90% use Facebook regularly, 62% YouTube, 60% Twitter.

Digital Engagement Profile

97% own a computer, 95% a smartphone, 61% a tablet.



49% use a smartphone most often to participate in digital engagement.



52% use apps on their smartphone or tablet more than a few times a day.

Digital Engagement Profile

41% have downloaded 10 to 20 apps in the last 12 months.



56% sometimes ask a company to "push" information or deals to them.



46% never click through on digital ads.

Digital Engagement Profile

63% sometimes click through on links in promotional/marketing emails.



Most often use Facebook for keeping up with/staying connected with friends.



Most often use Twitter for keeping up with news/current events.

Digital Engagement Profile

Most often use LinkedIn for communicating with contacts/connections.



Most often use YouTube for entertainment/fun.



Most often use Instagram for sharing/seeing pictures.

Digital Engagement Profile

Most often use Pinterest for recipes/cooking ideas.

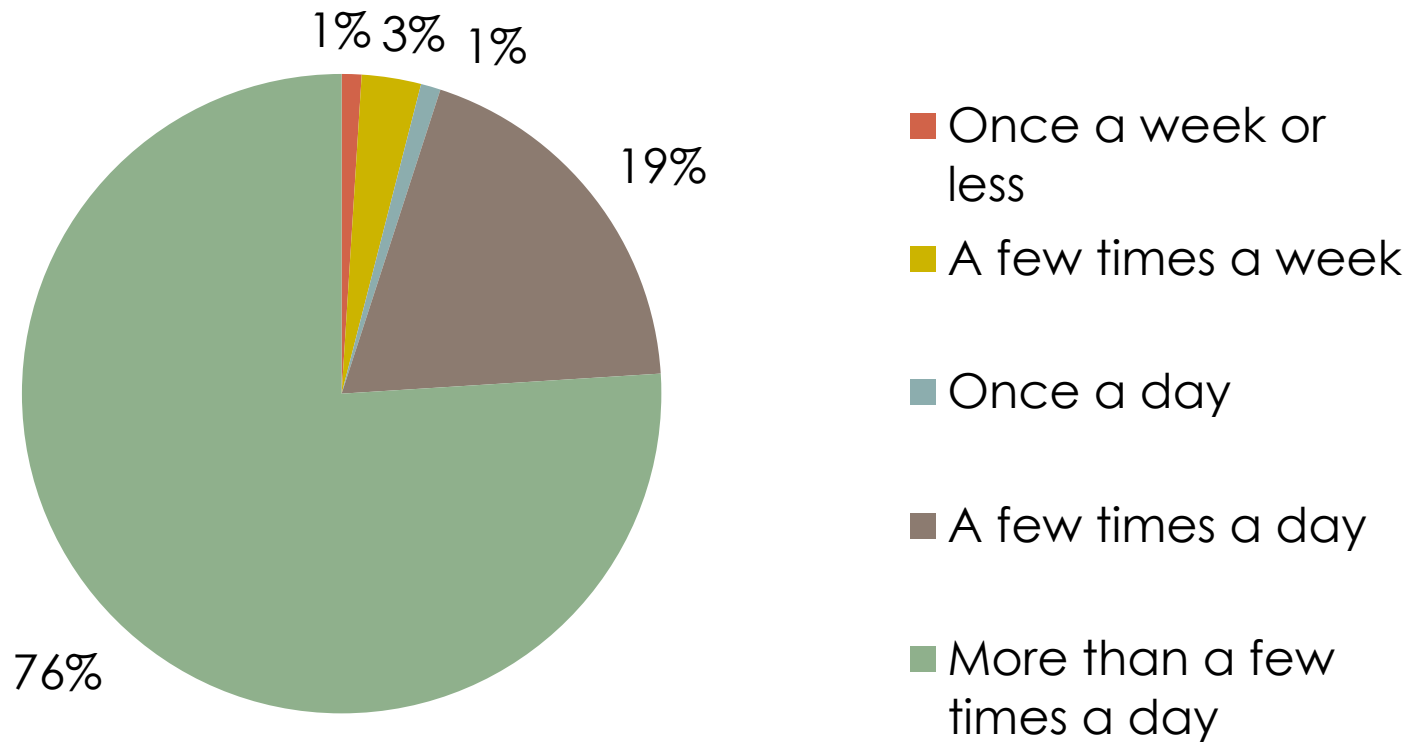


20% used MySpace at one time, but not anymore.



77% follow The Commercial Appeal on social media, 58% WMC-TV Channel 5.

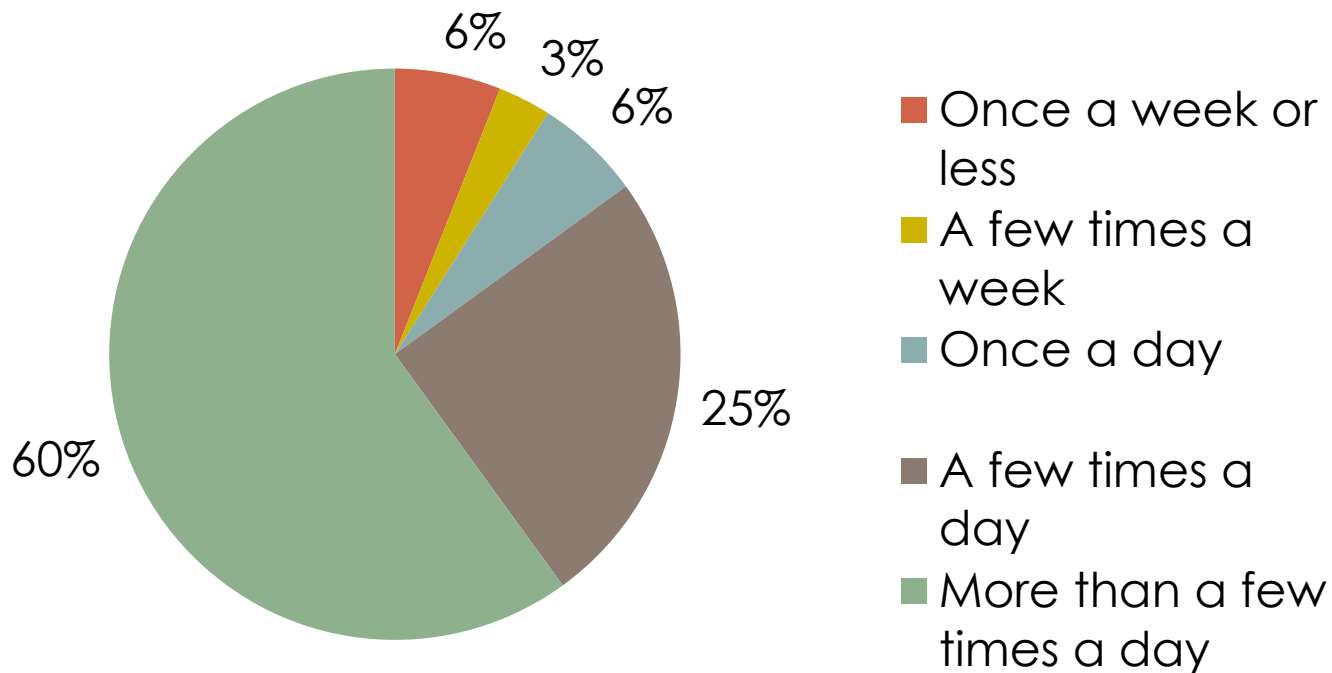
Overall Use Frequency



Overall Use Frequency

- Three out of four respondents, 76%, said they participate in digital engagement (such as social media use, visiting websites or downloading and using apps) **more than a few times a day.**
- A combined only 5% of those surveyed participate in digital engagement only **once a day or less.**

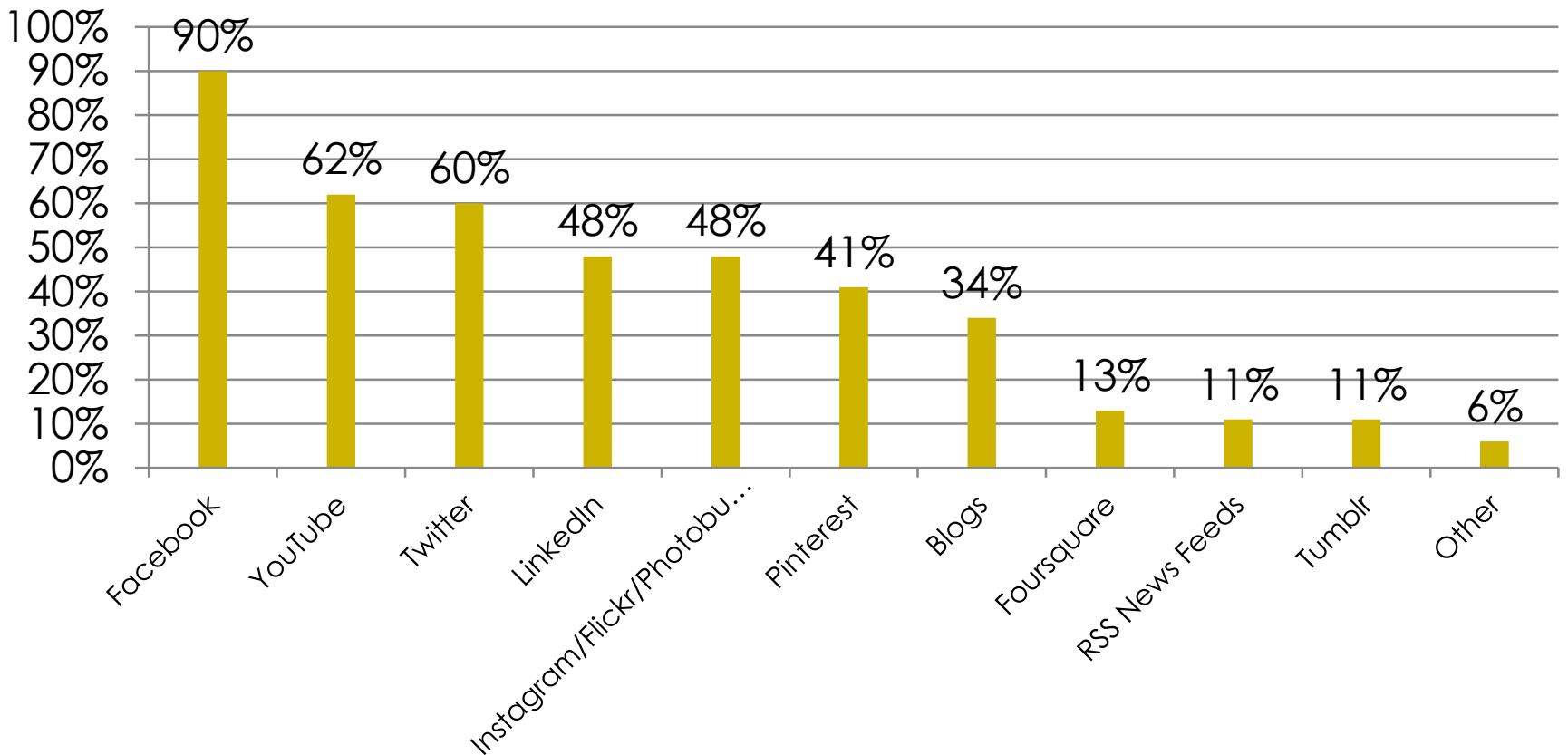
Social Media Frequency



Social Media Frequency

- Six in 10 of those surveyed reported visiting social media sites **more than a few times a day** (60%). An additional 25% said they visit social media sites **a few times a day**.
- The least frequent visitation of social media sites, **once a week or less**, is represented by 6% of respondents.

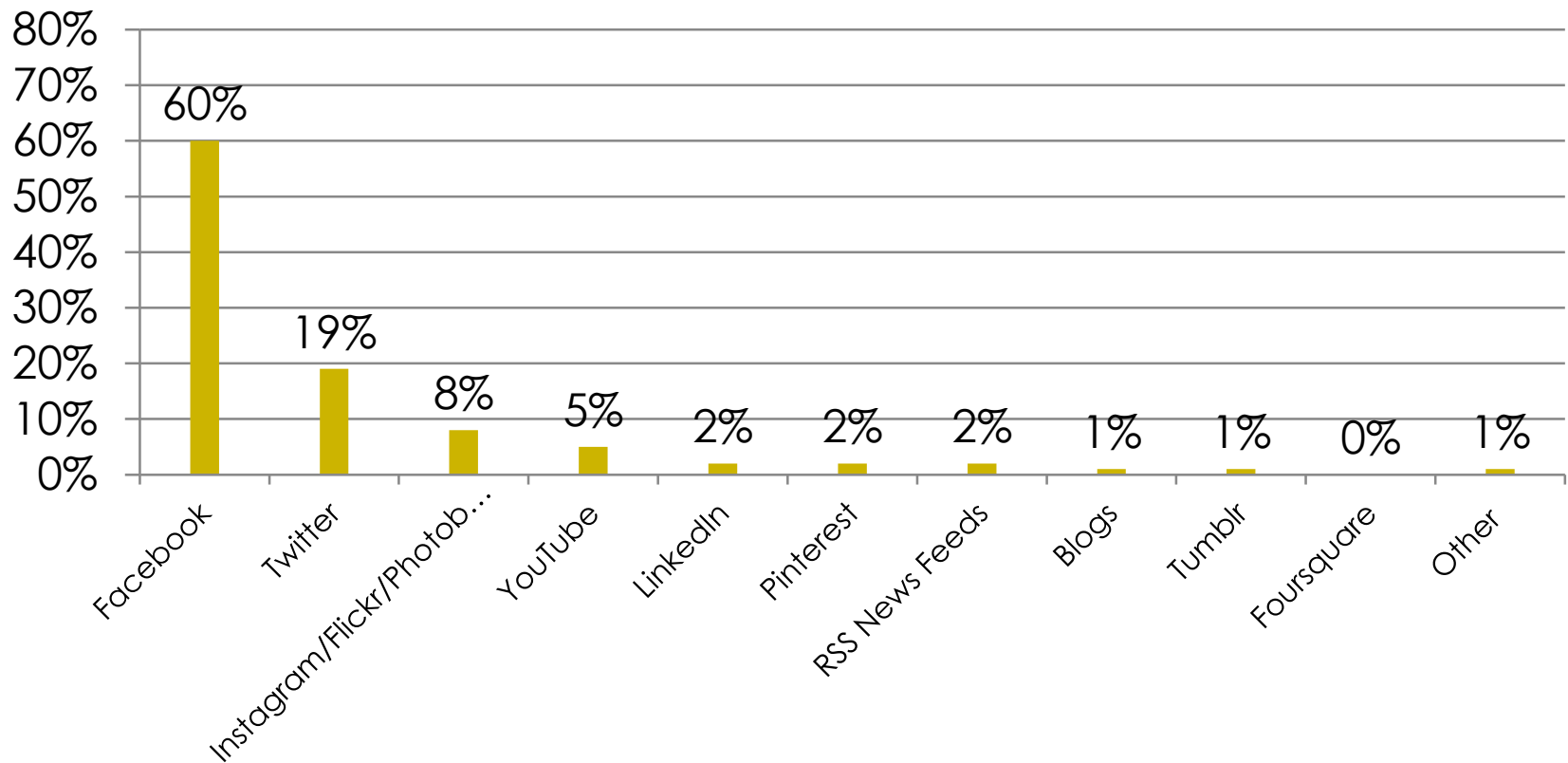
Social Media Sites Used



Social Media Sites Used

- Of 10 social media platforms respondents were asked to indicate if they use on a regular basis, **Facebook** was named by far the most often (90%).
- A majority of survey participants regularly use **YouTube** and **Twitter** (62% and 60% respectively), while about half use **LinkedIn** and **Instagram/Flickr/Photobucket** on a regular basis (48% each).
- The social media platforms clearly used least often by respondents are **Foursquare** (13%), **RSS News Feeds** (11%) and **Tumblr** (11%).

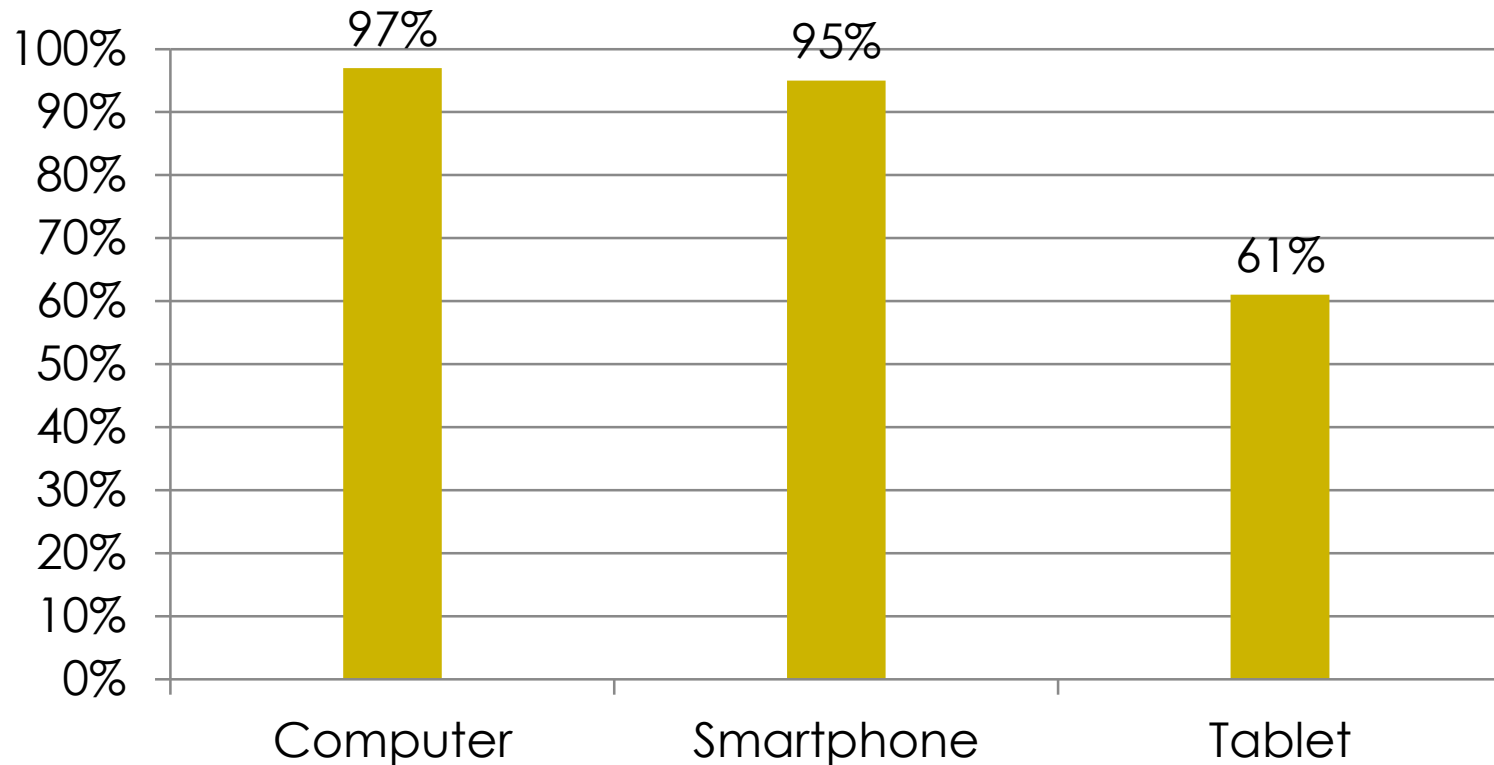
Site Most Used



Site Most Used

- By about a 3:1 margin, more respondents named **Facebook** as the social media platform they use most often (60%, vs. 19% for second-place **Twitter**).
- **Instagram/Flickr/Photobucket**, at 8%, was the only other platform that more than 5% of the survey sample uses most often.

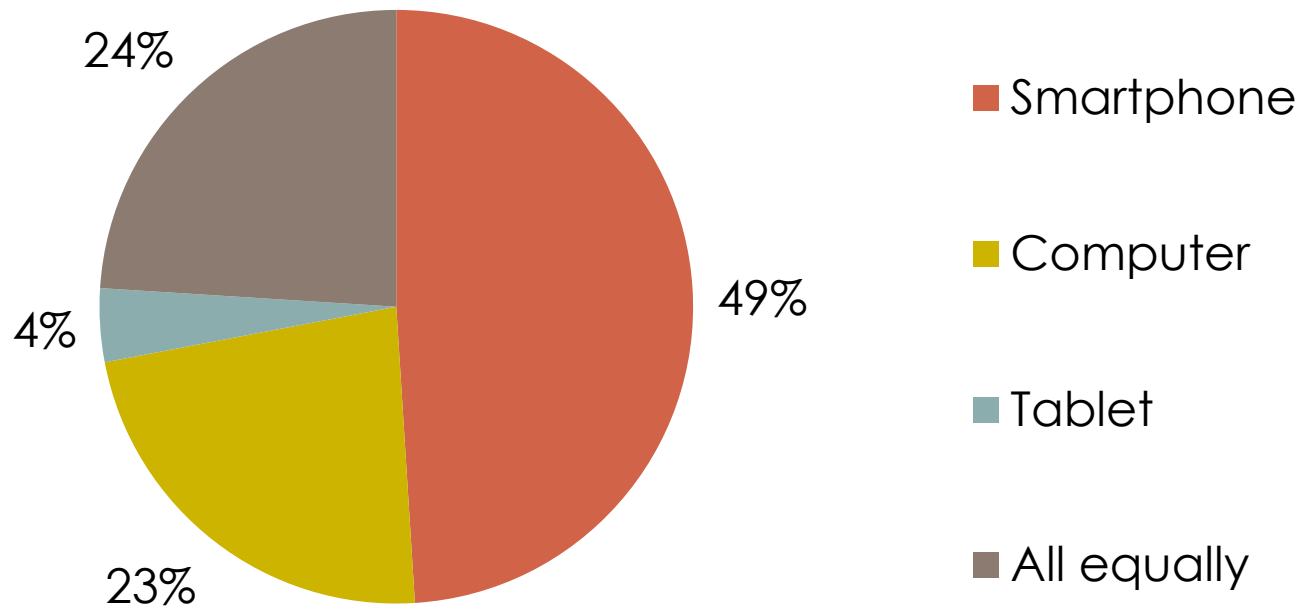
Technology Ownership



Technology Ownership

- When asked which of three types of technology they own, nearly all respondents said they own a **computer** (97%) and a **smartphone** (95%).
- Six in 10 survey participants, 61%, reported that they own a **tablet**.

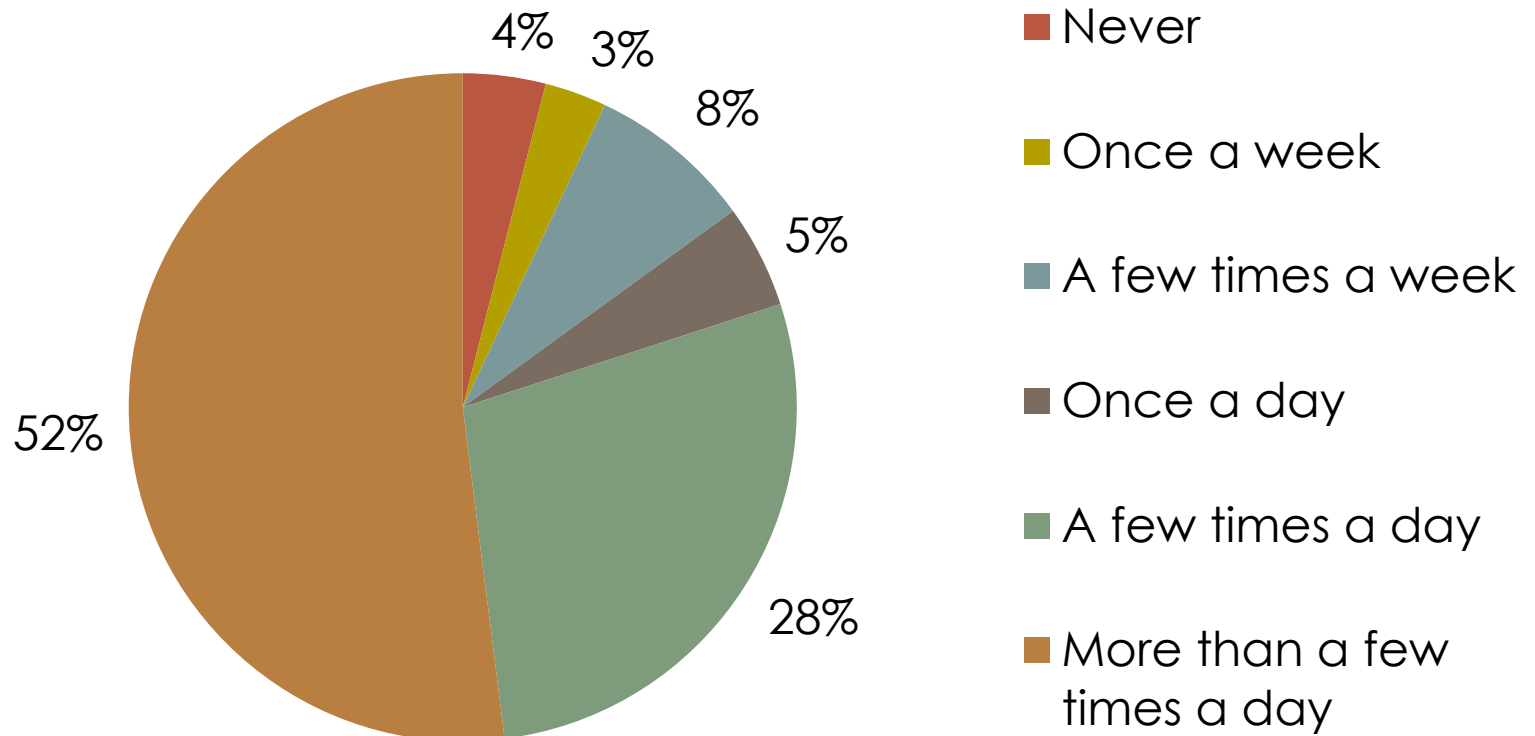
Technology Most Used



Technology Most Used

- As a follow-up to the previous survey question, respondents were asked to identify the one technology they use most often to participate in digital engagement.
- About half of those surveyed use a **smartphone** most often when they participate in digital engagement (49%); this was roughly twice the 23% who most often use a **computer**.
- One-fourth of the survey sample **equally uses a smartphone, computer and tablet** for digital engagement (24%).

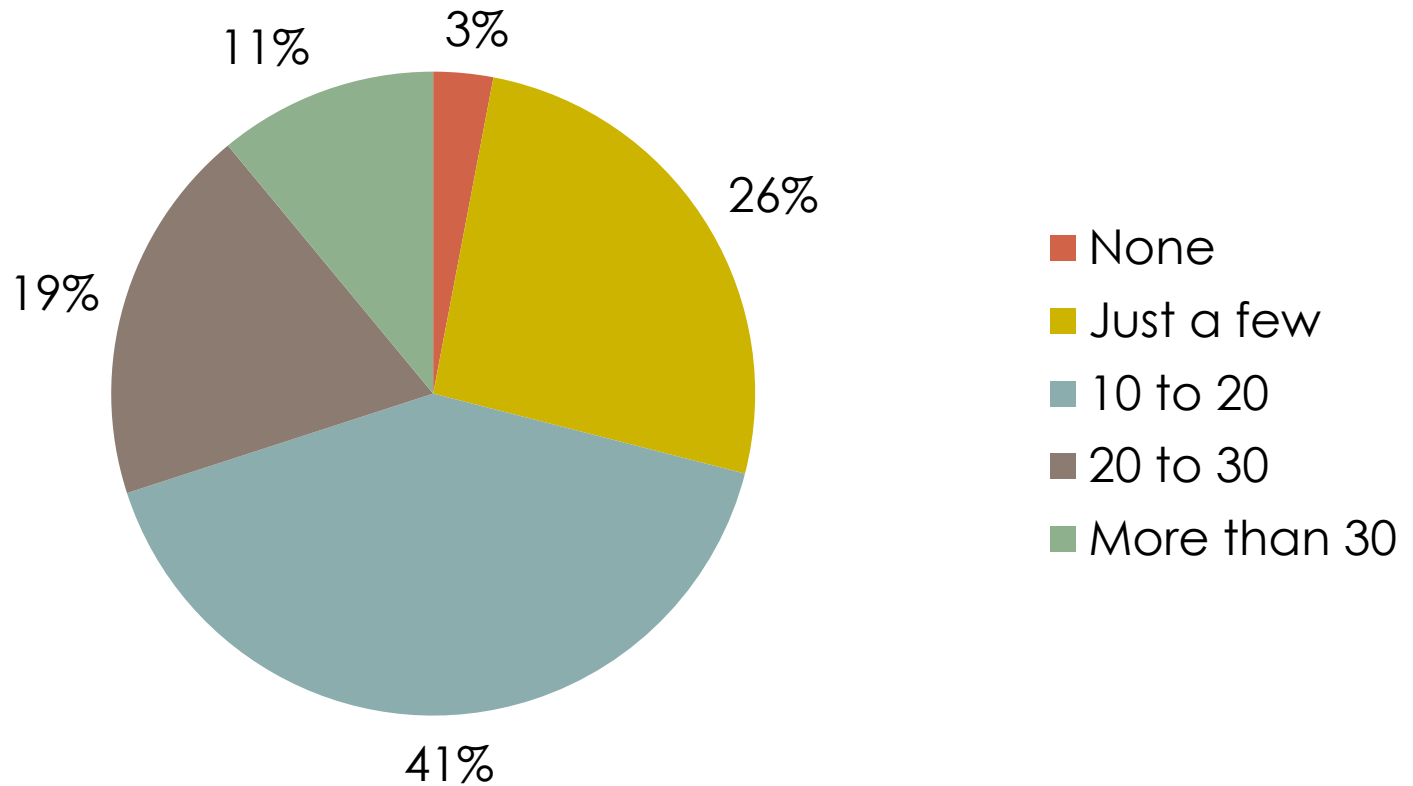
App Use



App Use

- Slightly more than half of those surveyed, 52%, said they use apps on their smartphone or tablet **more than a few times a day.**
- Combined, 85% of respondents use apps on their smartphone or tablet **once a day or more.**

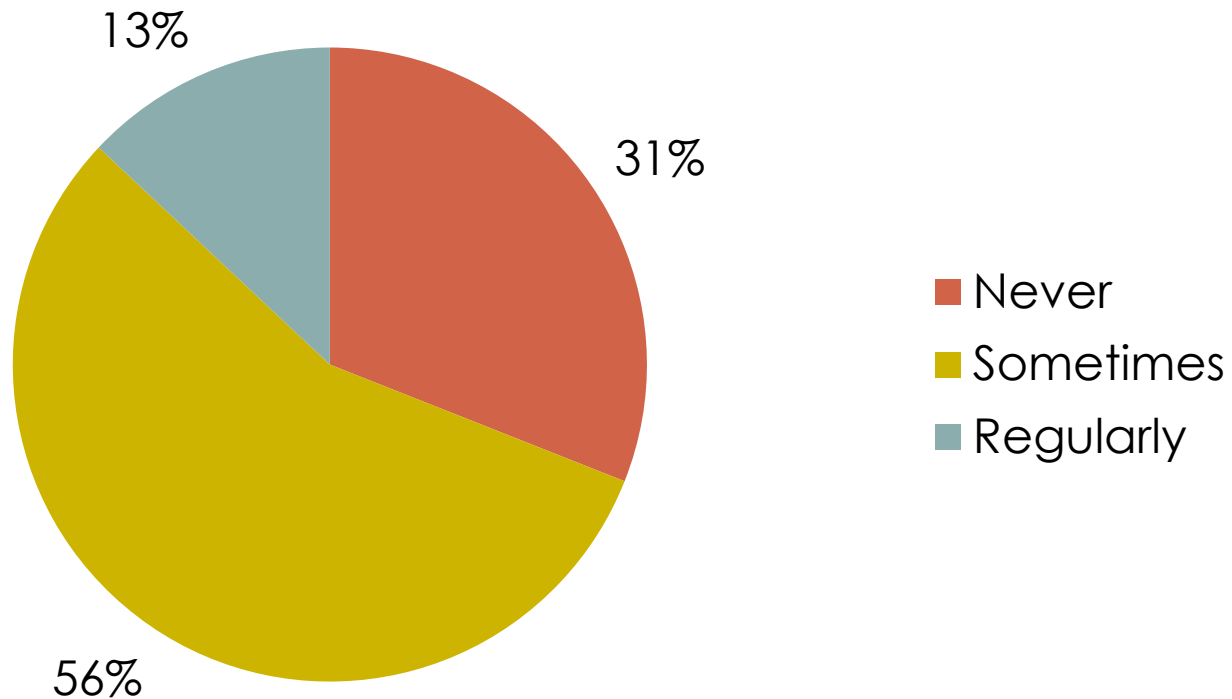
Apps Downloaded



Apps Downloaded

- A large segment of respondents, 41%, said they have downloaded **10 to 20 apps** in the last 12 months. An additional combined 30% of survey participants said that in the last 12 months they have downloaded **at least 20 apps**.
- About one-quarter of the survey sample has downloaded **just a few apps** in the last 12 months (26%).

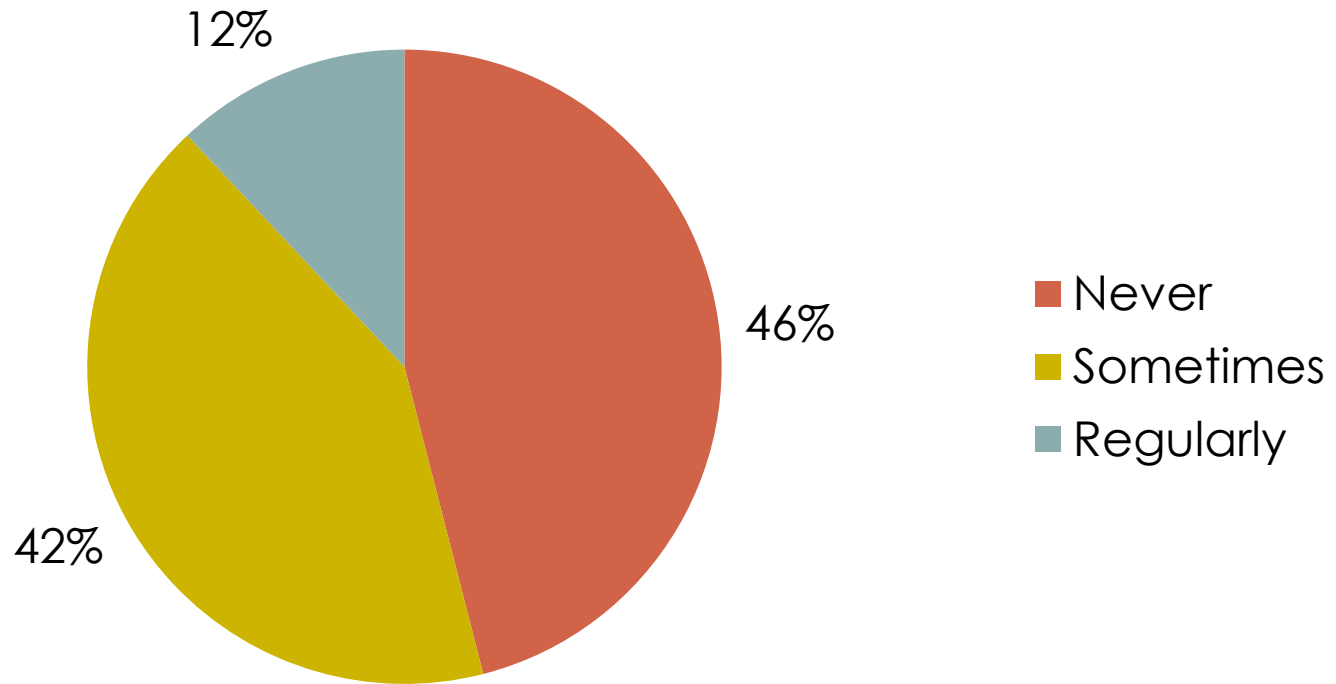
Request Info 'Pushes'



Request Info 'Pushes'

- Fifty-six percent (56%) of those surveyed said they **sometimes** ask a company to “push” information or deals to them via email, text or an app.
- About three in 10 respondents **never** ask a company to “push” information or deals to them (31%).

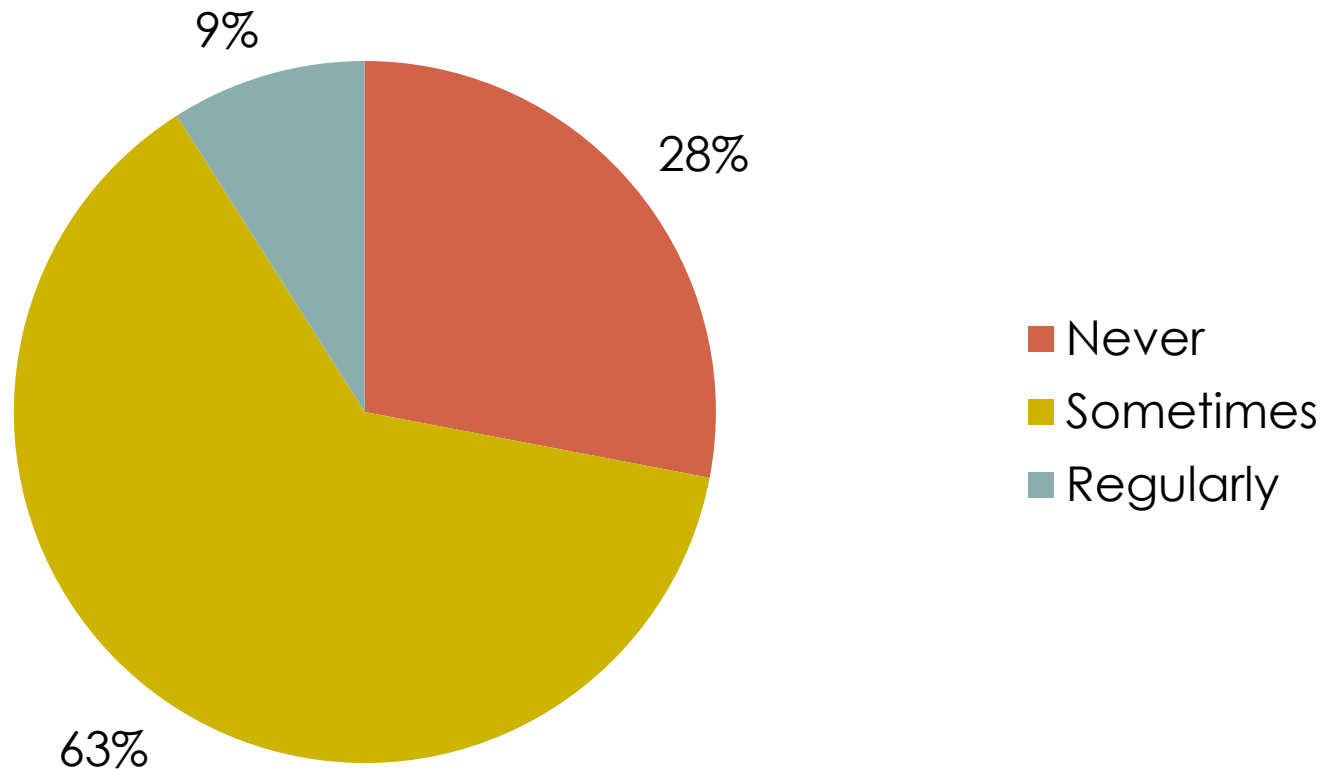
Clicking Digital Ads



Clicking Digital Ads

- Nearly half of survey respondents, 46%, said they **never** click through on digital ads on their computer, smartphone or tablet, but 42% do **sometimes** click through on digital ads.

Clicking Links: Promo Emails



Clicking Links: Promo Emails

- A sizeable percentage of respondents, 63%, **sometimes** clicks through on links in promotional/marketing emails.
- About three in 10 of those surveyed said they **never** click through on links in promotional/marketing emails (28%).

Facebook Use

176 respondents mentioned a reason they use Facebook. Listed below are the categories of reasons given that were mentioned by at least 2% of those who answered this survey question (more than one reason could be given).

Reasons Use Facebook

- Keeping up with/staying connected with friends (59% of those who responded)
- Keeping up with/staying connected with family (26%)
- Sharing/seeing pictures (9%)
- Keeping up with news/what's going on (9%)
- Work-related purposes (9%)
- Social connection in general (7%)
- Community information (5%)
- Keeping up with people in general (5%)
- Ease of use (4%)
- Entertainment (2%)

Twitter Use

106 respondents mentioned a reason they use Twitter. Listed below are the categories of reasons given that were mentioned by at least 2% of those who answered this survey question (more than one reason could be given).

Reasons Use Twitter

- Keeping up with news/current events (42% of those who responded)
- Work-related purposes (19%)
- Quick/short messages (12%)
- Communicate with friends/socialize (11%)
- Fun/entertainment/humor (10%)
- Information in general (9%)
- Sports information (9%)
- Instant information (7%)
- Memphis-related news/information (5%)
- Follow well-known people (4%)
- Entertainment news (3%)
- To tweet (2%)

LinkedIn Use

105 respondents mentioned a reason they use LinkedIn. Listed below are the categories of reasons given that were mentioned by at least 2% of those who answered this survey question (more than one reason could be given).

Reasons Use LinkedIn

- Communicating with contacts/connections (33% of those who responded)
- Networking in general (32%)
- Looking for job opportunities (19%)
- Market job skills/resume/profile (11%)
- Information/news/keeping up with trends (9%)
- Professional-related in general (3%)

YouTube Use

124 respondents mentioned a reason they use YouTube. Listed below are the categories of reasons given that were mentioned by at least 2% of those who answered this survey question (more than one reason could be given).

Reasons Use YouTube

- Entertainment/fun in general (27% of those who responded)
- Reference/instructional/how-to videos (19%)
- Videos in general (19%)
- Funny videos (11%)
- Listening to music (7%)
- Music videos (7%)
- Professional purpose videos (7%)
- Trending/viral videos (7%)
- Family videos (3%)
- Movies (2%)
- News/information in general (2%)

Instagram Use

84 respondents mentioned a reason they use Instagram. Listed below are the categories of reasons given that were mentioned by at least 2% of those who answered this survey question (more than one reason could be given).

Reasons Use Instagram

- Sharing/seeing pictures in general (38% of those who responded)
- Sharing/seeing pictures of friends (30%)
- Sharing/seeing pictures of family (14%)
- Filters/improve photographic ability (11%)
- Entertainment/fun (7%)
- Work-related purposes (4%)
- Easy/simple (2%)

Pinterest Use

83 respondents mentioned a reason they use Pinterest. Listed below are the categories of reasons given that were mentioned by at least 2% of those who answered this survey question (more than one reason could be given).

Reasons Use Pinterest

- Recipes/cooking ideas (29% of those who responded)
- Ideas/inspiration in general (17%)
- Store ideas for future reference (16%)
- Decorating ideas (13%)
- Do-it-yourself projects (11%)
- Crafts (10%)
- Fashion/clothing/style ideas (10%)
- Pictures/visuals (6%)
- Entertainment/fun (4%)
- Information (4%)
- Projects in general (4%)
- Creative ideas (2%)
- Quotes (2%)
- Wedding ideas (2%)
- Work-related ideas (2%)

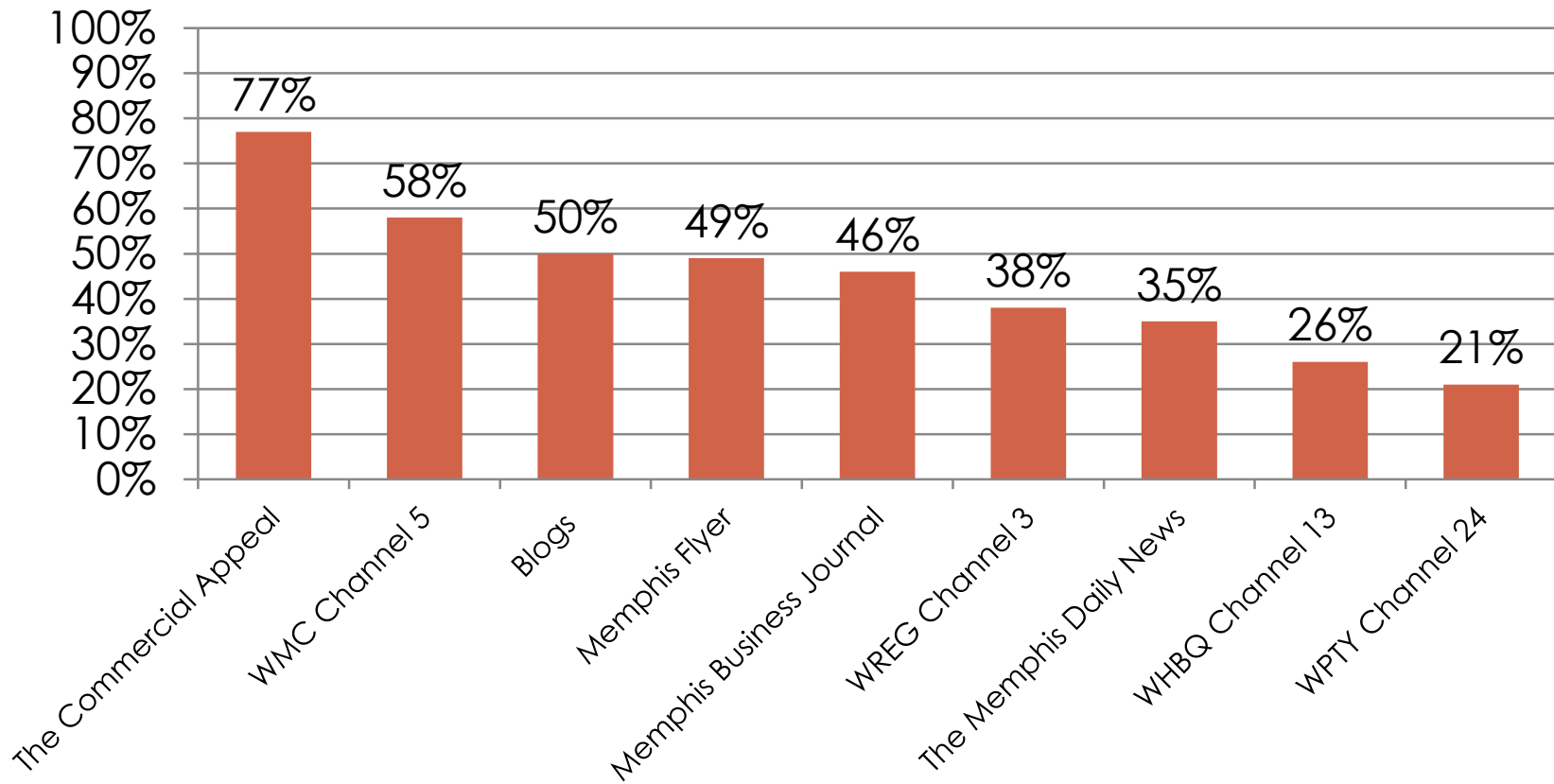
Abandoned Sites

32% of all respondents mentioned at least one platform they once used, but don't use anymore.

Platforms Don't Use Anymore

- MySpace (20% of all respondents)
- Foursquare (5%)
- Google + (3%)
- Pinterest (3%)
- Twitter (3%)
- 1% or less each: Blogger, Facebook, Flickr, Google Chat, Instagram, Last.fm, LinkedIn, LiveJournal, Photobucket, Polyvore, PureVolume, Skype, StumbleUpon, Tumblr, Vimeo, Vine, Xanga, YouTube

Local Outlets Followed



Local Outlets Followed

- After being presented with a list of nine Memphis-area news outlets they might follow on social media sites, via apps, through emails or on websites, **The Commercial Appeal** was identified as the news outlet followed most often (77%, or 19 points higher than second-place **WMC-TV Channel 5**, 58%).
- About half of the survey sample follows three Memphis-area news outlets: **Blogs** (50%), **Memphis Flyer** (49%) and **Memphis Business Journal** (46%).

Favorite Blogs

- I Love Memphis (33 mentions)
- Hungry Memphis (2)
- Paul Ryburn's Journal (2)
- Walking in Memphis in High Heels (2)
- 1 mention each: Best Memphis Burger, Beyond the Arc, Choose 901, Dining with Monkeys, Down the Road, East Memphis Moms, Edible Communities, Elements of Style, FM 100, Fuzzy Brew, Just My Memphis, Memphis Museums, Memphis Stew, Memphis Zoo, Smart City, Strength Running, The Frugal Girl, The Memphis Blog, Volunteer Odyssey, Whining & Dining

Reliance on New Sources

57% of all respondents mentioned at least one local news source they depend on most for digitally delivered news.

News Sources Depend On

- The Commercial Appeal (23% of all respondents)
- WMC-TV Channel 5 (18%)
- WREG-TV Channel 3 (7%)
- Memphis Business Journal (5%)
- The Memphis Daily News (5%)
- Memphis Flyer (4%)
- I Love Memphis (3%)
- WHBQ-TV Channel 13 (2%)
- WKNO-FM 91.1 (2%)
- 1% or less each: Choose 901, DeSoto Times, East Memphis Moms, Just My Memphis, Mediaverse, WEVL-89.9 FM, WGKX-FM 105.9, WPTY-TV Channel 24

Fave New Source on Twitter

54% of all respondents mentioned one local news source they would follow on Twitter.

News Sources Would Follow

- The Commercial Appeal (16% of all respondents)
- WMC-TV Channel 5 (13%)
- Memphis Flyer (5%)
- WHBQ-TV Channel 13 (4%)
- I Love Memphis (3%)
- Memphis Business Journal (2%)
- The Memphis Daily News (2%)
- WREG-TV Channel 3 (2%)
- 1% or less each: Choose 901, East Memphis Moms, Jason Smith, Just My Memphis, Kyle Veazey, WGKX-FM 105.9, WIVG-FM 96.1, WKIM-FM 98.9, WKNO (TV or radio not specified), WKVF-FM 94.9, WMFS-FM 92.9, WPTY-TV Channel 24

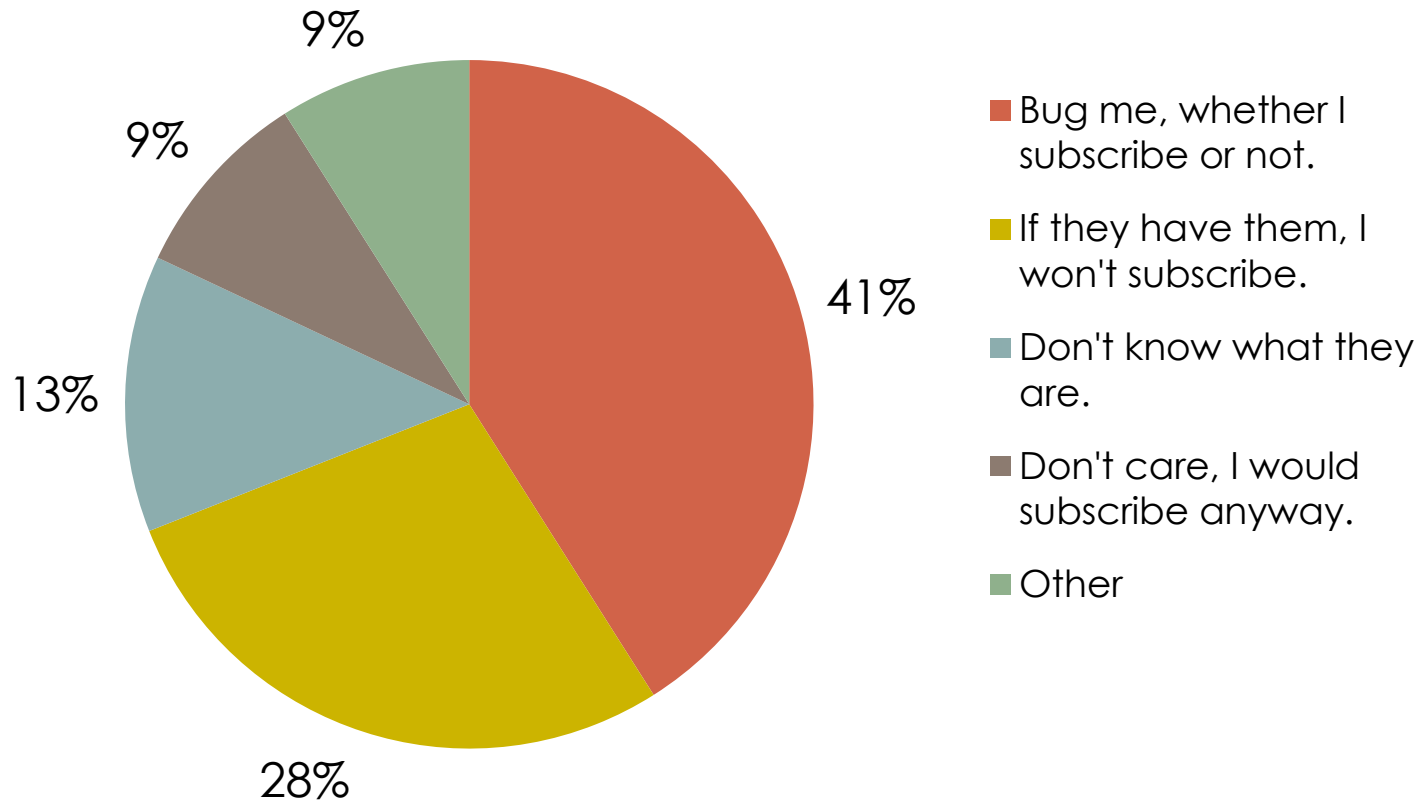
Fave News Pro on Twitter

31% of all respondents mentioned a favorite news professional to follow on Twitter.

Favorite Reporters/News Professionals To Follow

- Geoff Calkins (5% of all respondents)
- Joey Sulipeck (2%)
- Kontji Anthony (2%)
- Valerie Calhoun (2%)
- 1% of less each: Anderson Cooper, Andrew Douglas, Andrew Kaczynski, Andy Ashby, Andy Freeman, Andy Wise, Brian Williams, Bruce VanWyngarden, Candace McCowan, Chris Herrington, Chris Vernon, Dan Barry, Dave Brown, David Brooks, Ed Arnold, Erin Burnett, Ernie Freeman, Gary Parrish, James Dowd, Jason Smith, Joe Birch, Jon Stewart, Joy Reid, Joyce Peterson, Kerry Crawford, Kristin Tallent, Kyle Veazey, Kym Clark, Lauren Lee, Lauren Squires, Lester Holt, Markova Reed, Matt Gerien, Mearl Purvis, Mike Erskine, Rodney Dunigan, Sam Sifton, Wendi Thomas. *(Note: This question did not limit responses to a local reporter/news professional.)*

Paywalls



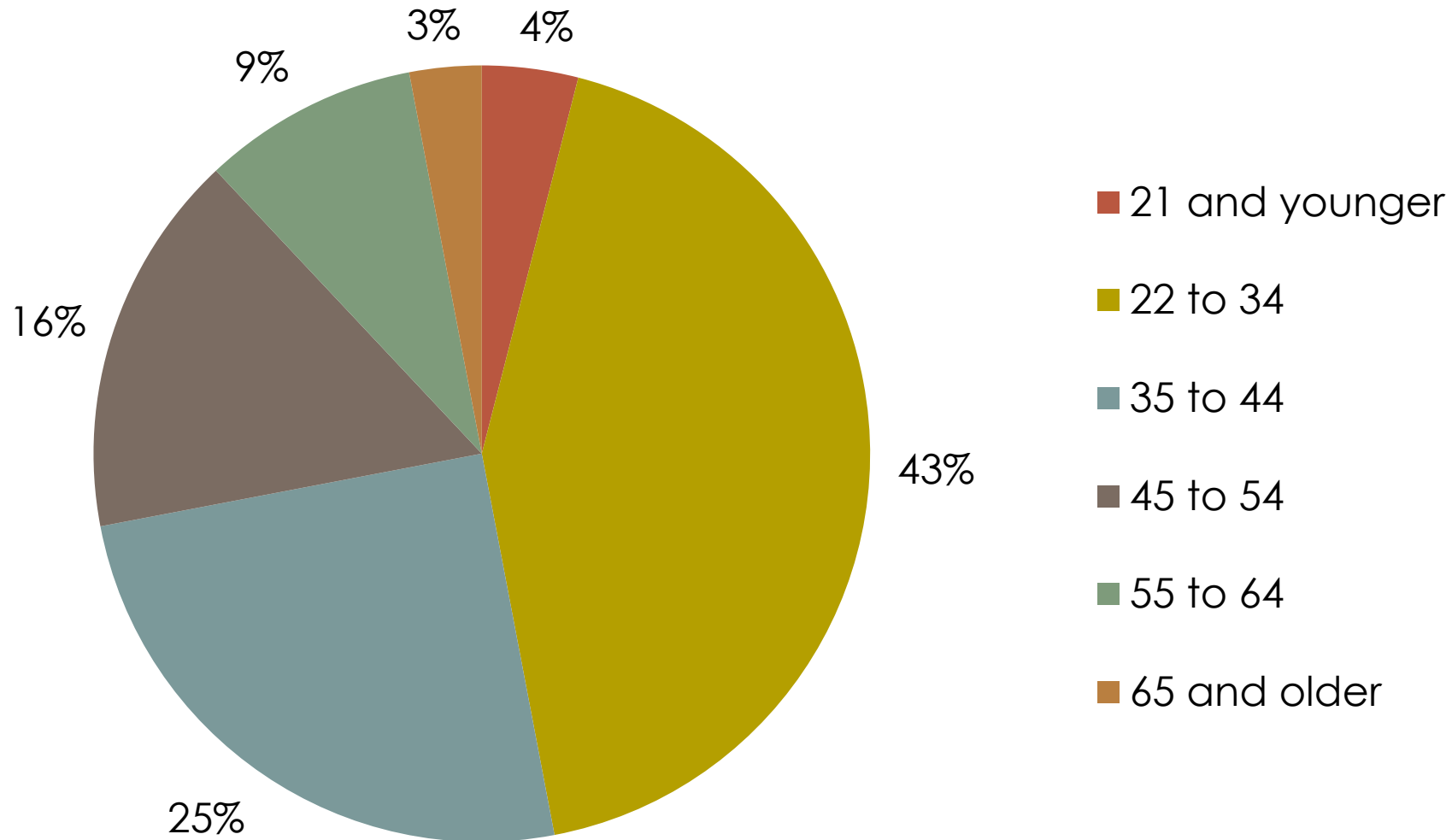
Paywalls

- By a 28% to 9% margin, more respondents with a definite opinion said that if a news organization has a paywall or access restriction based on subscription they **won't subscribe** than said they **would subscribe anyway**.
- Forty-one percent (41%) of the survey sample said that paywalls or access restrictions based on subscription **bug them in general, whether they are a subscriber or not**.

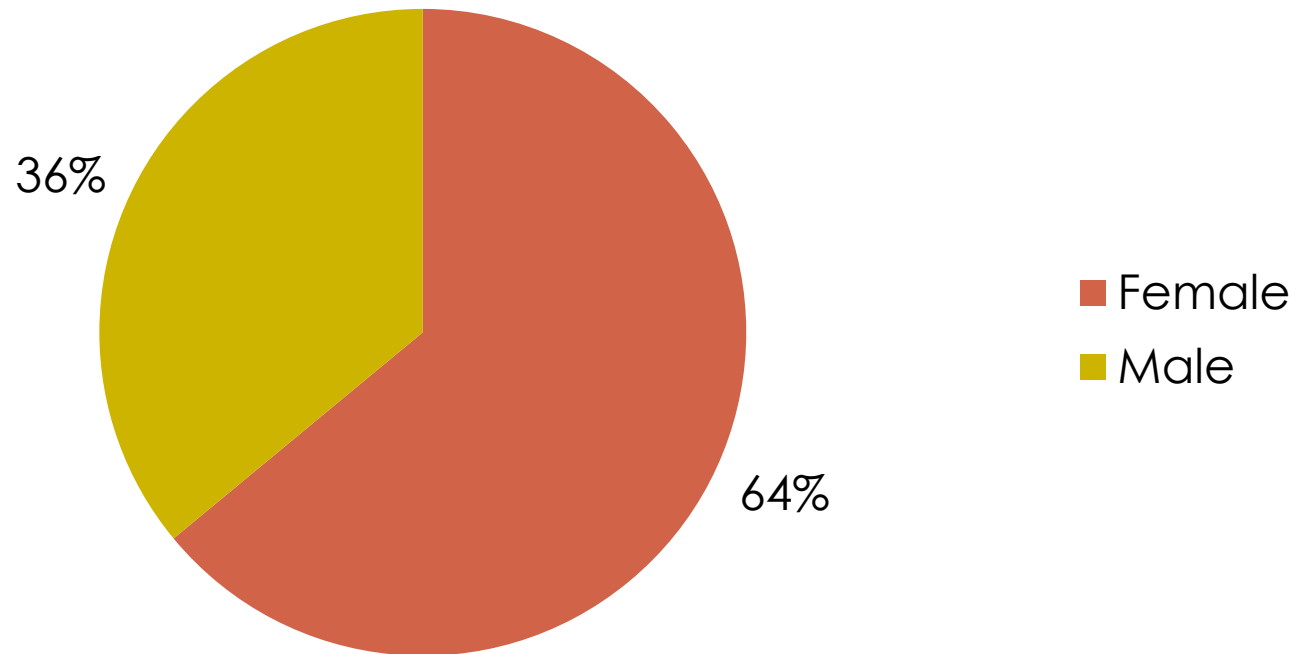
Survey Demographics

- By far, the largest segment of respondents, 43%, was between 22 and 34 years old.
- Sixty-four percent (64%) of those surveyed were female, 36% male.
- The vast majority of respondents live in Shelby County (85%), while 9% reside in DeSoto County.
- In terms of respondents' home ZIP code, 38117 (11%) and 38104 (10%) were represented most often by the people participating in this survey.

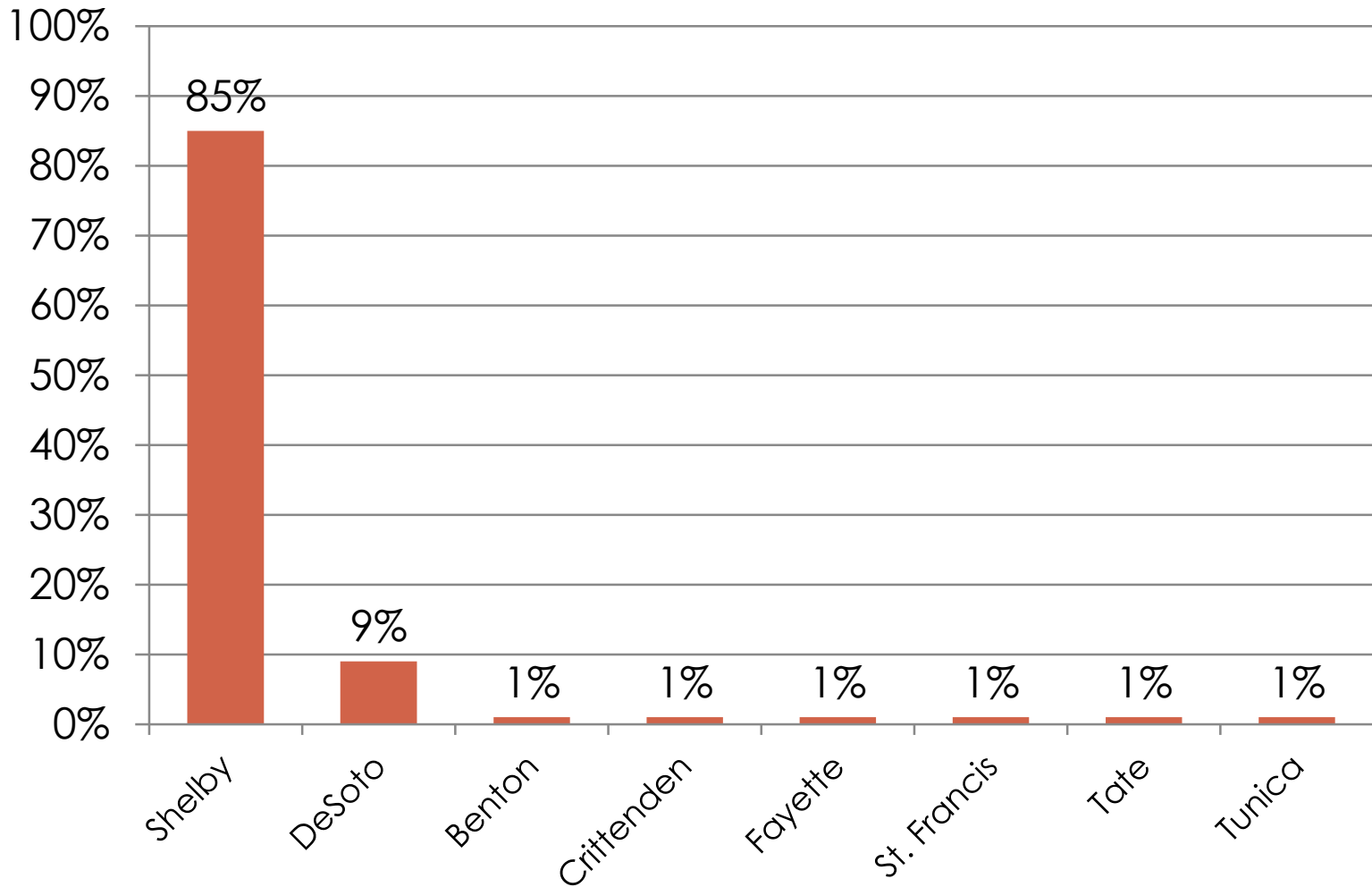
Survey Demographics



Survey Demographics



Survey Demographics



Survey Demographics

38117 (11% of all respondents)

38104 (10%)

38119 (7%)

38017 (6%)

38111 (6%)

38016 (5%)

38103 (5%)

38138 (5%)

38139 (5%)

38654 (5%)

38112 (4%)

38018 (3%)

38120 (3%)

38671 (3%)

38002 (2%)

38107 (2%)

38125 (2%)

1% or less each: 38014, 38053, 38060, 38066, 38106, 38115, 38116, 38118, 38122, 38128, 38134, 38135, 38141, 38320, 38351, 38618, 38632, 38637, 38651, 38664, 38668, 38672, 38676, 38680, 72327, 72335.

Thank you!



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