

2015 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.
- Beginning in 2013 and again in 2014 and 2015, the 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 22, 2015, area residents were invited to take the 2015 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 10, 2015, a total of 201 surveys were returned.
- 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 201 people who participated in this survey.

Digital Engagement Profile

69% participate in digital engagement more than a few times a day.



53% visit social media sites more than a few times a day.



47% are consistent throughout the day in their digital activity.

Digital Engagement Profile

86% use Facebook regularly, 60%
Twitter, 55% Instagram, 54% YouTube.



99% own a smartphone, 95% a
computer, 69% a tablet.



57% use a smartphone most often to
participate in digital engagement.

Digital Engagement Profile

49% rated their smartphone addiction level a "7" or higher on a 10-point scale.



46% never click through on digital ads.



49% sometimes click through on links in promotional/marketing emails.

Digital Engagement Profile

49% rated their digital security level a "7" or higher on a 10-point scale.



45% follow a business on social media to know more and stay updated on services, products and offerings.



35% said too much posting is why they would quit following a business on social media.

Digital Engagement Profile

53% said sending too frequently is why they would unsubscribe to an e-newsletter.



46% would look at social media posts to find out what's going on in the city this weekend.



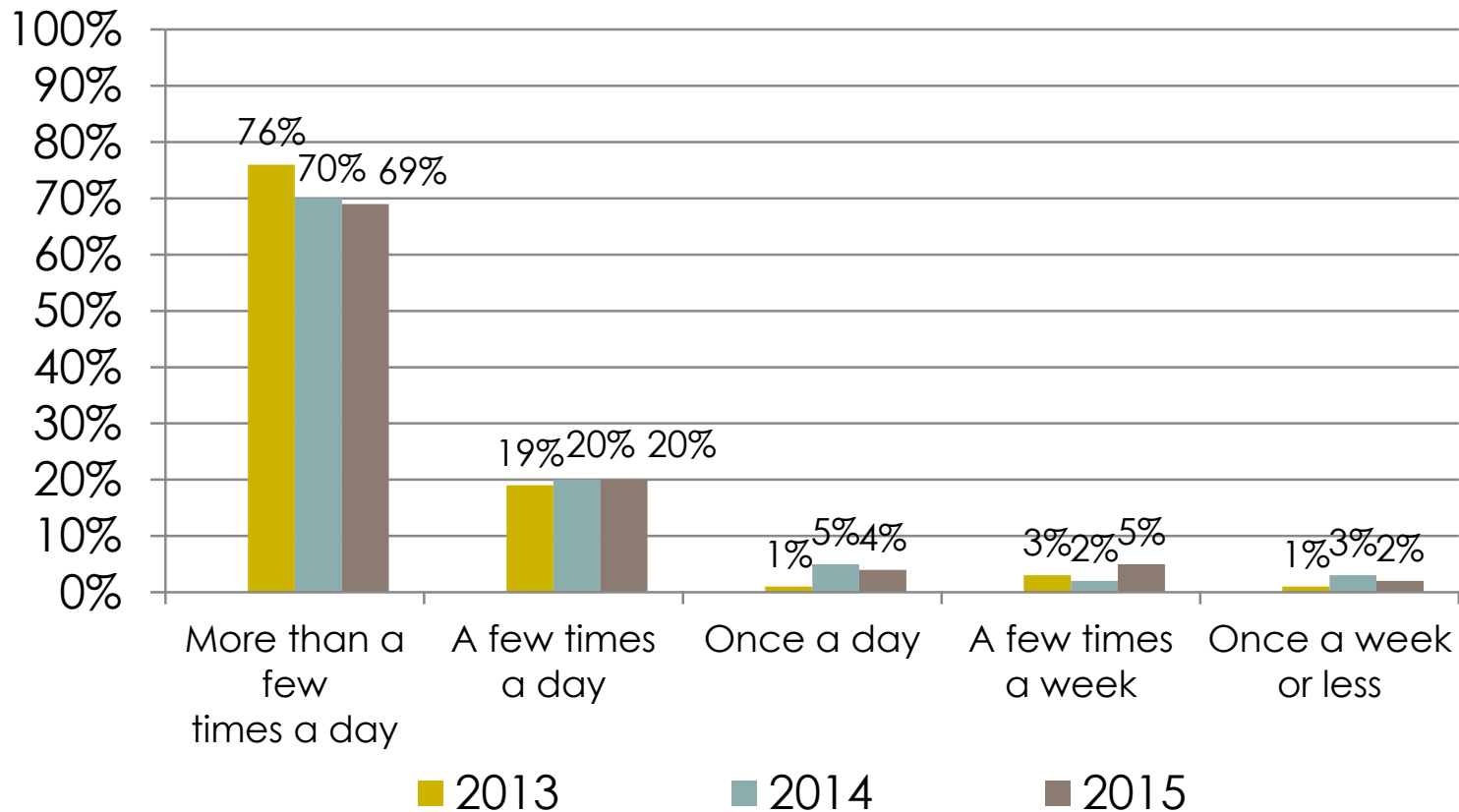
38% stay on a company's website if a company's website isn't mobile-friendly.

Digital Engagement Profile

84% are likely to visit a restaurant, store or event based on social media “buzz” alone.



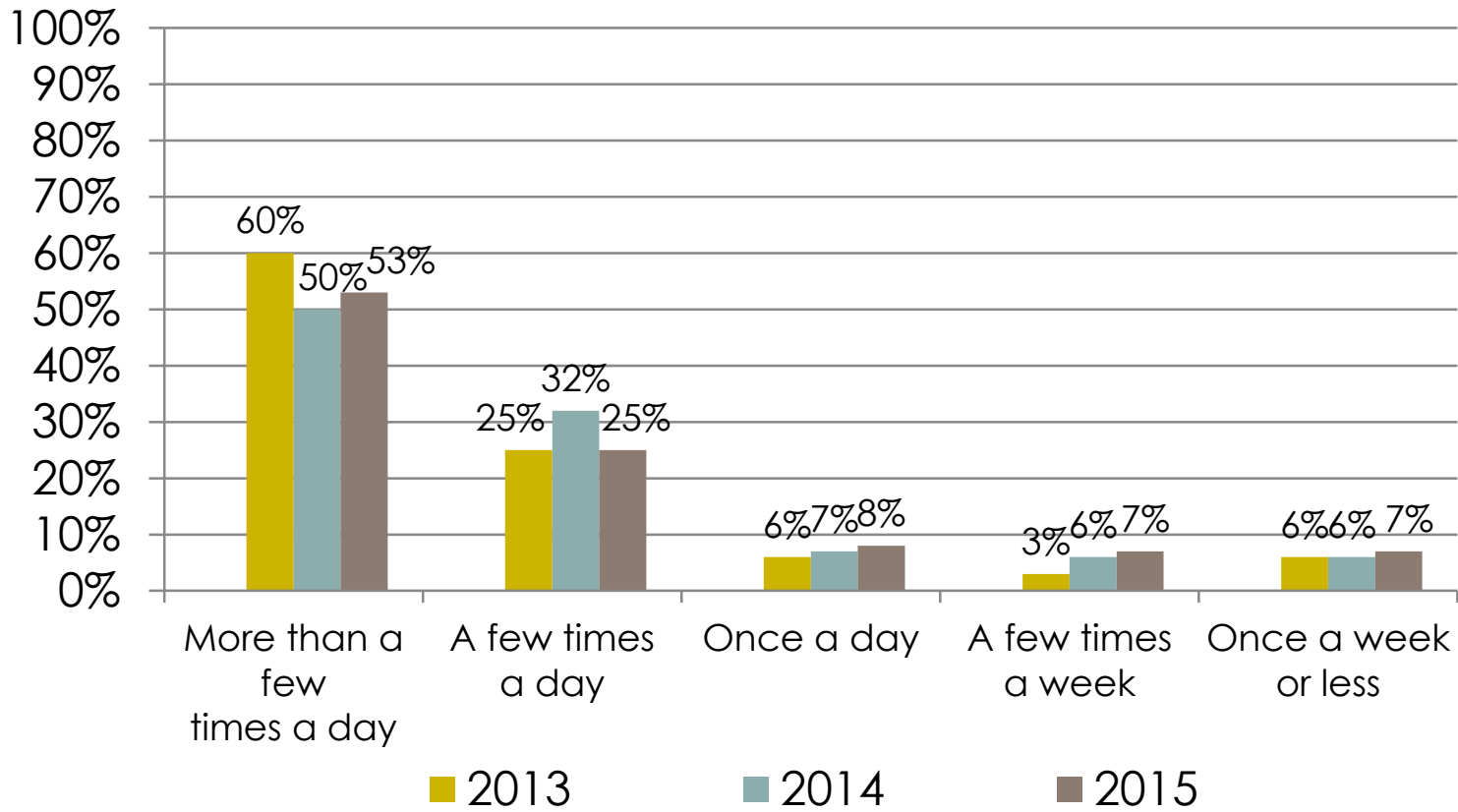
Overall Use Frequency



Overall Use Frequency

- In this 2015 survey, 69% of respondents 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**, with only a combined 11% participating **once a day or less**.
- After decreasing six points from the original 2013 survey to the 2014 survey (76% to 70%), this year's survey saw basically no change in the percentage of those surveyed who reported participating in digital engagement **more than a few times a day** (69%).

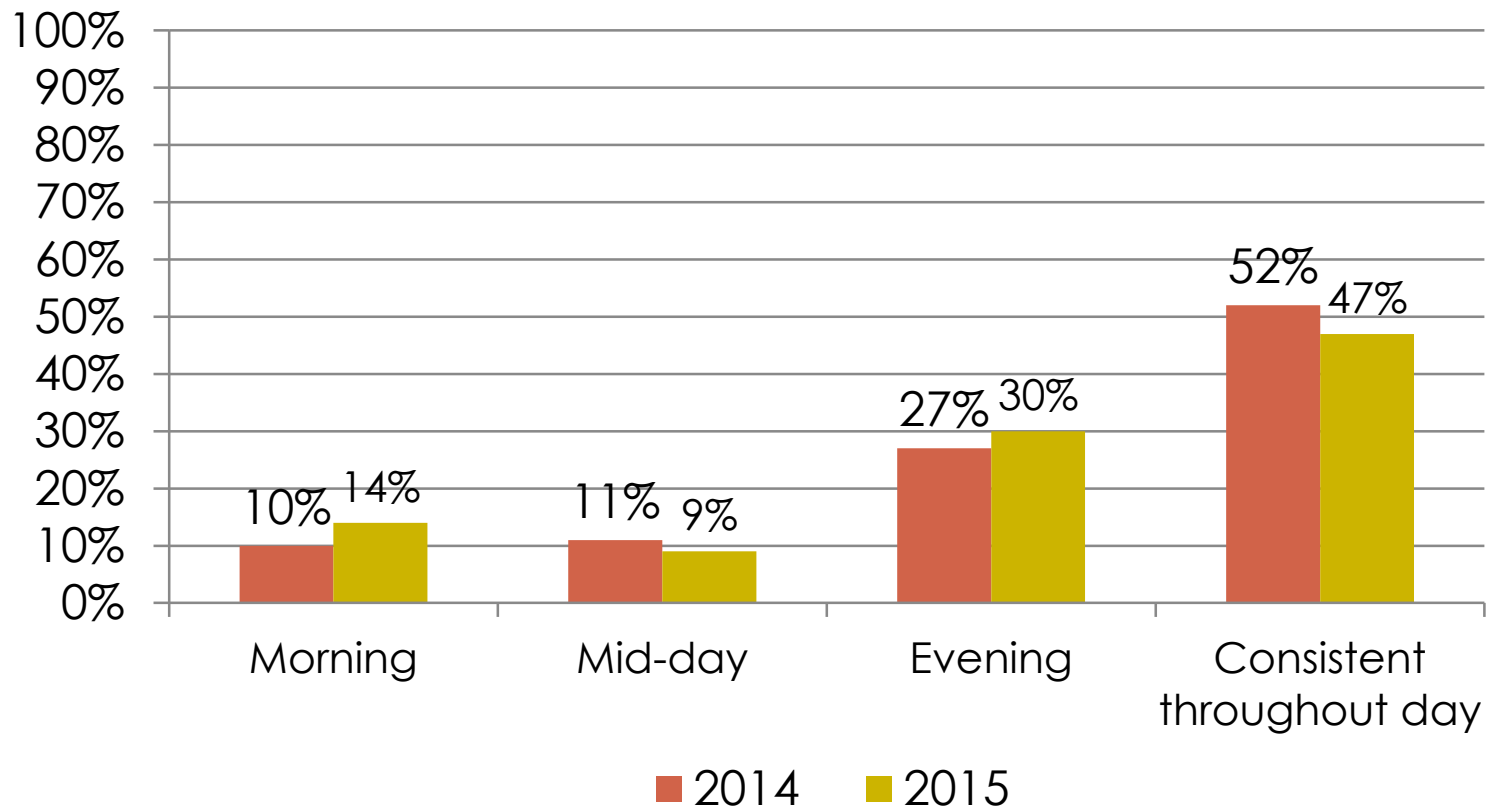
Social Media Frequency



Social Media Frequency

- Fifty-three percent (53%) of those participating in this 2015 survey reported visiting social media sites **more than a few times a day**, with an additional 25% visiting social media sites **a few times a day**. Only 7% of respondents this year said they only visit social media sites **once a week or less**.
- From the 2013 survey to the 2014 survey, there was a 10-point decrease in the number of respondents who said they visit social media sites **more than a few times a day** (60% to 50%); this trend was partially reversed in this 2015 survey (three-point increase, to 53%).

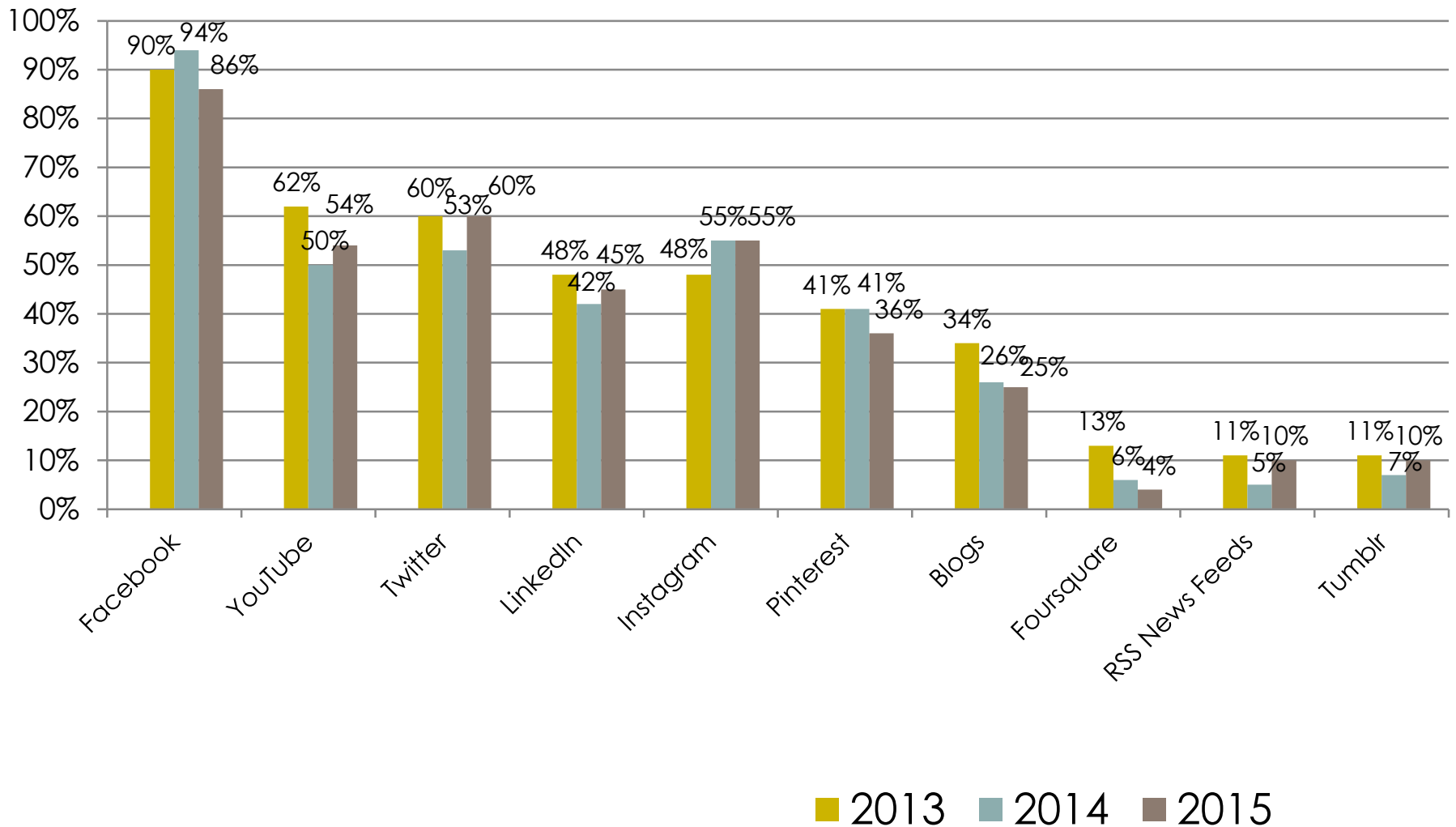
Time Of Day Most Active



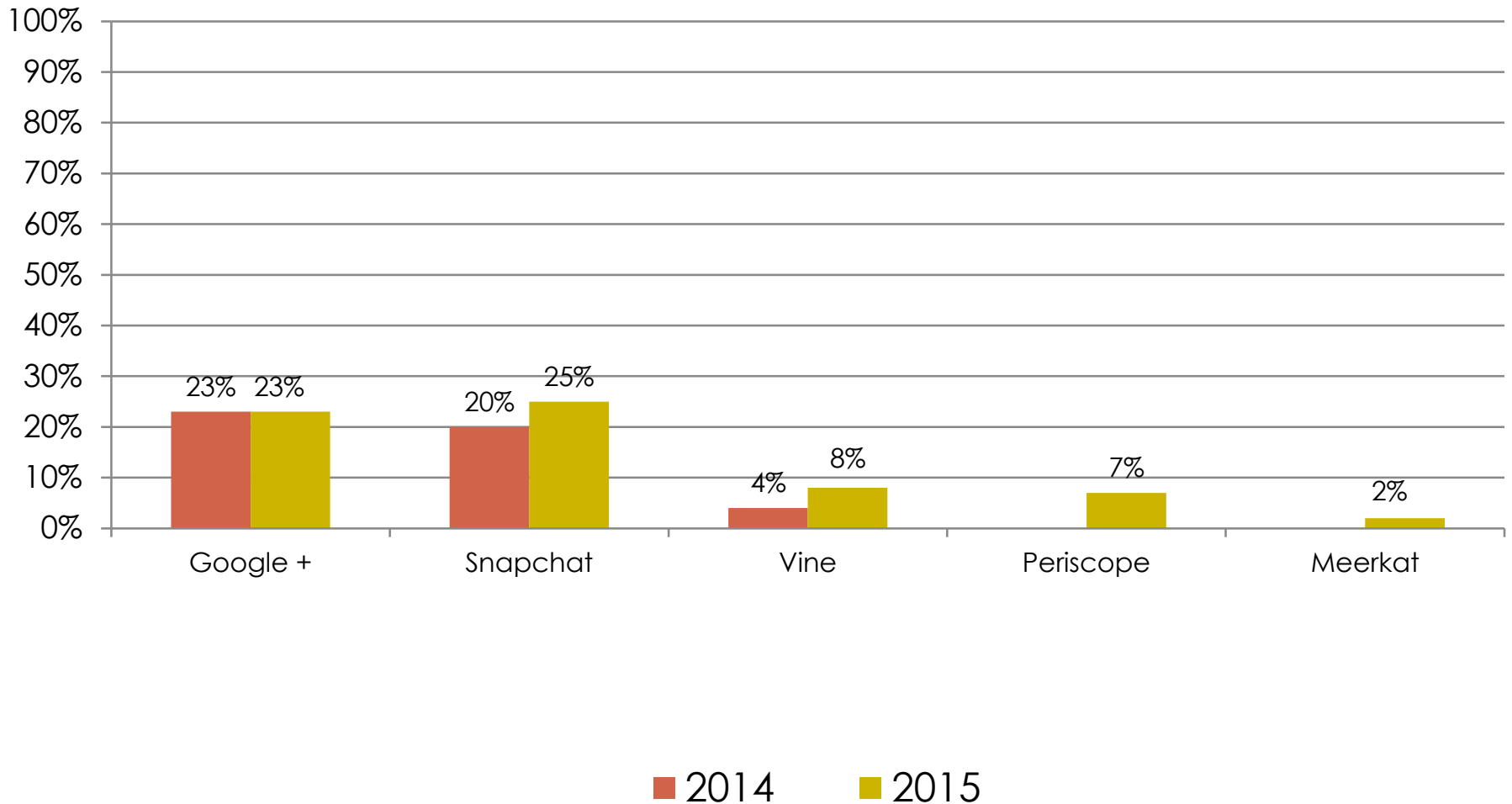
Time Of Day Most Active

- In this 2015 survey, slightly less than half of those surveyed said they are most active “digitally” **consistently throughout the day** (47%).
- If most active during a specific time of day, respondents this year were more likely to say they are most active “digitally” during the **evening** (30%), as opposed to **morning** (14%) or **mid-day**(9%).
- Since the 2014 survey, the first time this question was asked, there has been a slight four-point increase in respondents saying they are most active “digitally” during the **morning** (to 14%), and a five-point decrease in being most active **consistently throughout the day** (to 47%).

Social Media Sites Used



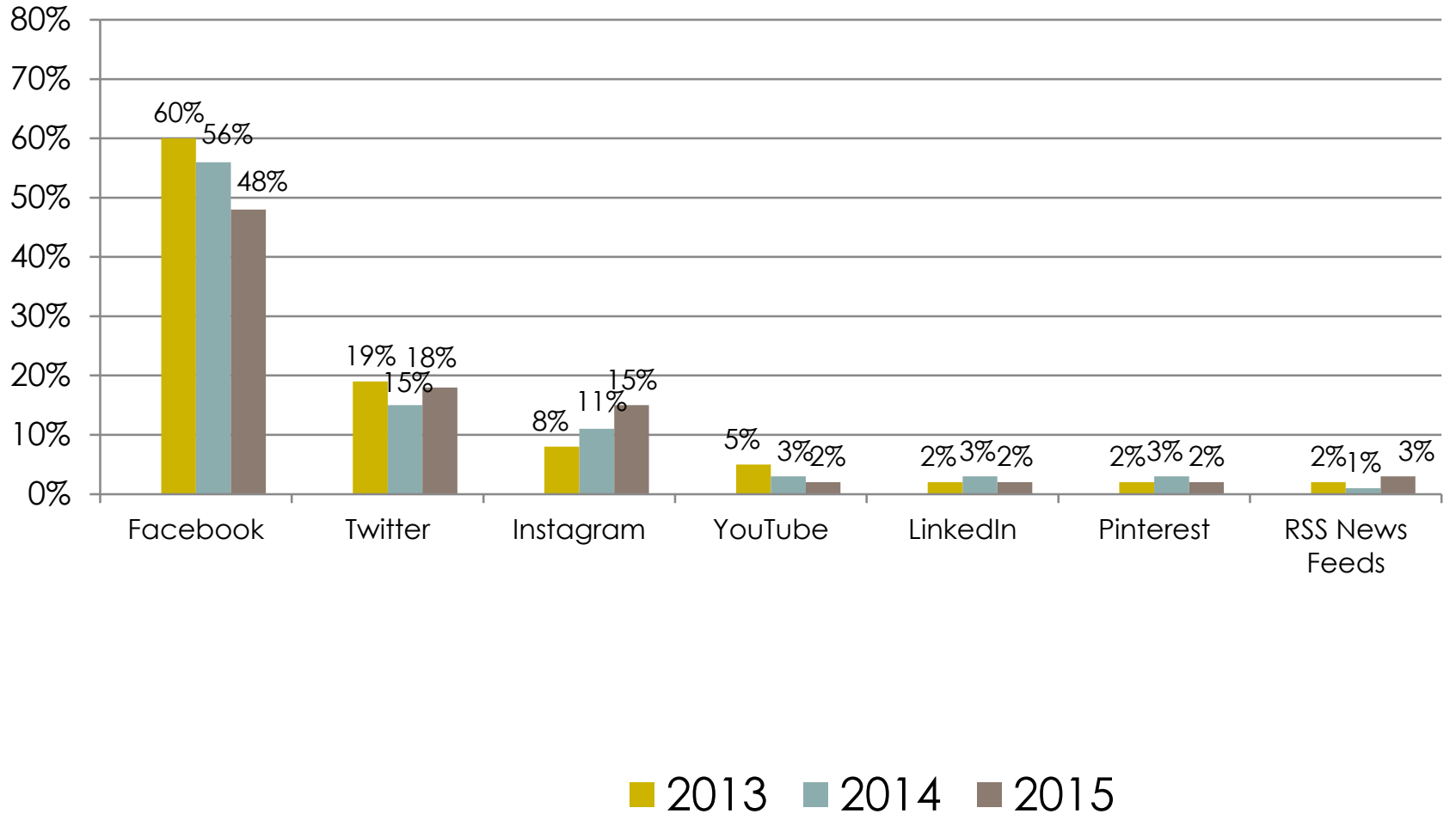
Social Media Sites Used



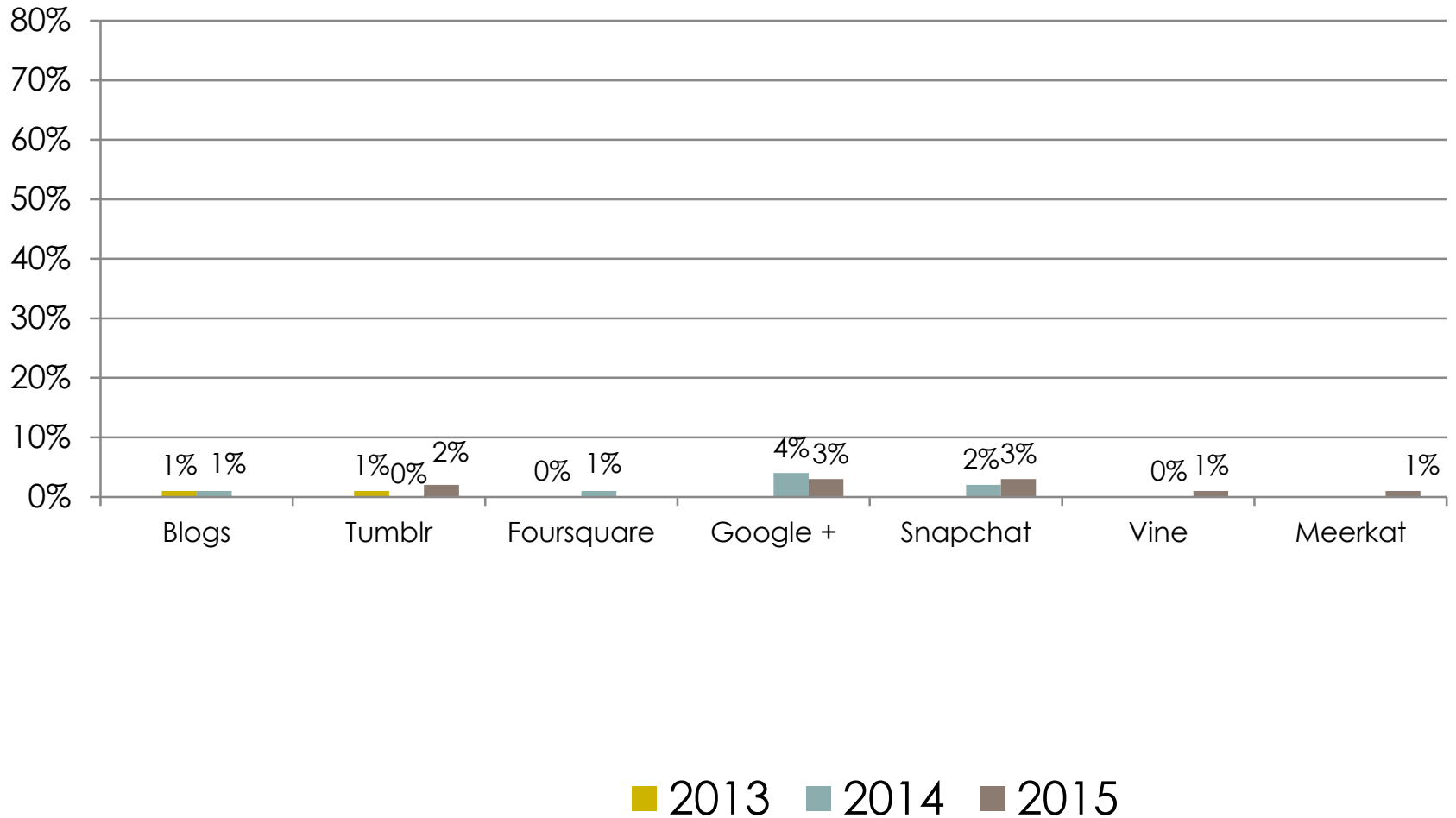
Social Media Sites Used

- Of 15 social media platforms respondents were asked to indicate if they use on a regular basis, **Facebook** was named most often in this year's survey (86%).
- As far as being the second most-often used platform in this 2015 survey, only six points separated **Twitter** (60%), **Instagram** (55%), and **YouTube** (54%).
- Though a relatively new social media platform, again this year, as in 2014, quite a few respondents named **Snapchat** as a platform they use on a regular basis (25% this year).
- While there is no disputing that it has been far and away the most popular social media platform among respondents in all three years' surveys, this 2015 survey did see **Facebook's** mentions as a platform regularly used decrease eight points since 2014 (to 86%).
- On the other hand, two of the other leading platforms experienced a bit of an increase this year in respondents saying they use the platforms on a regular basis – **Twitter** (seven-point increase, to 60%) and **YouTube** (four-point increase, to 54%). In both cases, these 2015 increases follow decreases in usage in the 2014 survey.

Site Most Used



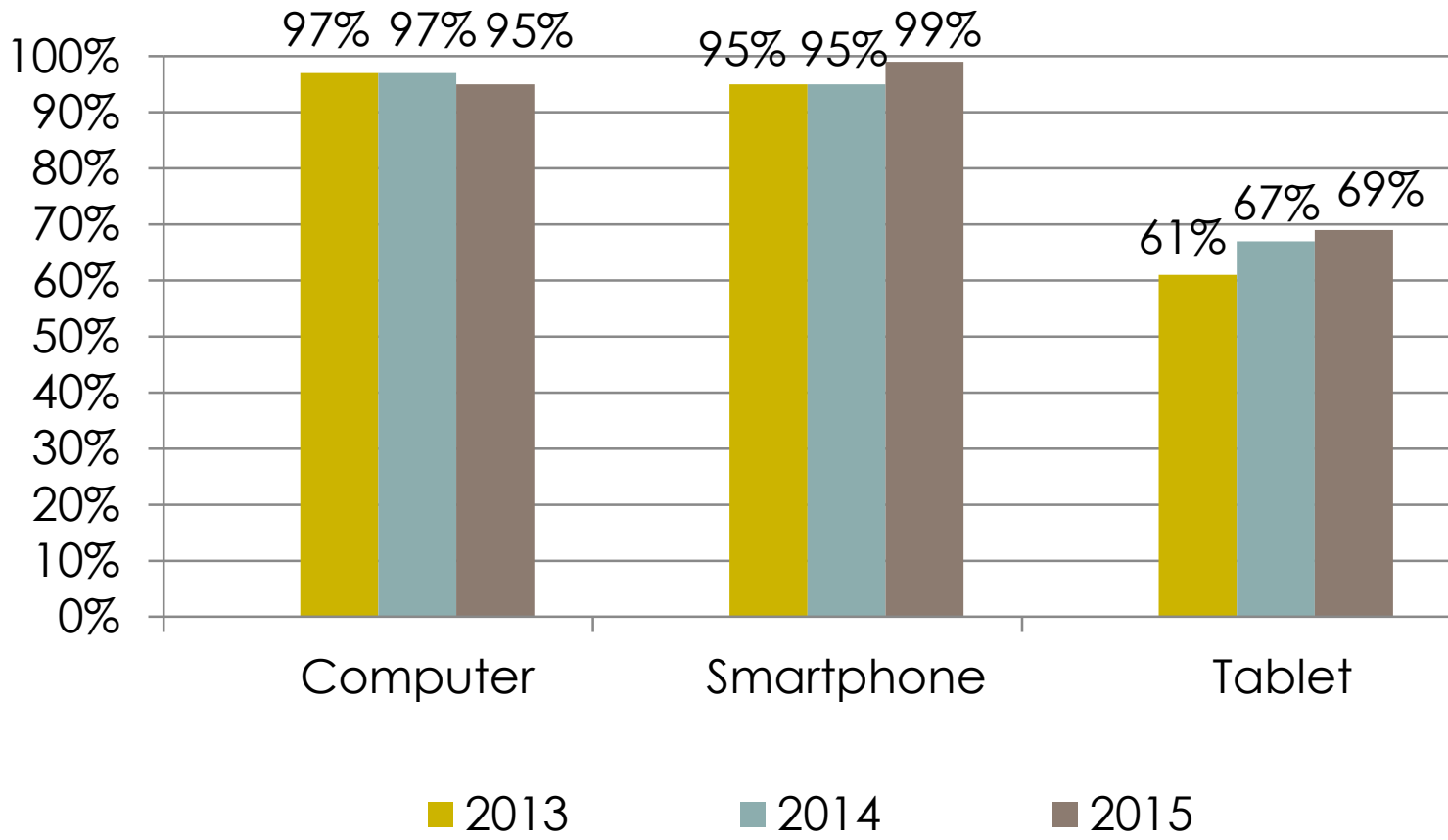
Site Most Used



Site Most Used

- Just under half of the 2015 survey sample, 48%, named **Facebook** as the social media platform they use most often.
- **Twitter** (18%) and **Instagram** (15%) were the only other social media platforms that more than 3% of those participating in this year's survey said they use most often.
- From a 60% level in the original 2013 survey, **Facebook** has now seen its “most used” score decrease 12 points (to 48% this year, but still far above any other platform).
- Though remaining far below **Facebook's** 48% score, this 2015 survey saw slight increases since 2014 in both **Twitter** and **Instagram** being named as the social media platform respondents use most (increases of three points and four points respectively, to 18% and 15%, respectively). **Instagram's** “most used” score has now basically doubled since the original 2013 survey (8% to 15%).

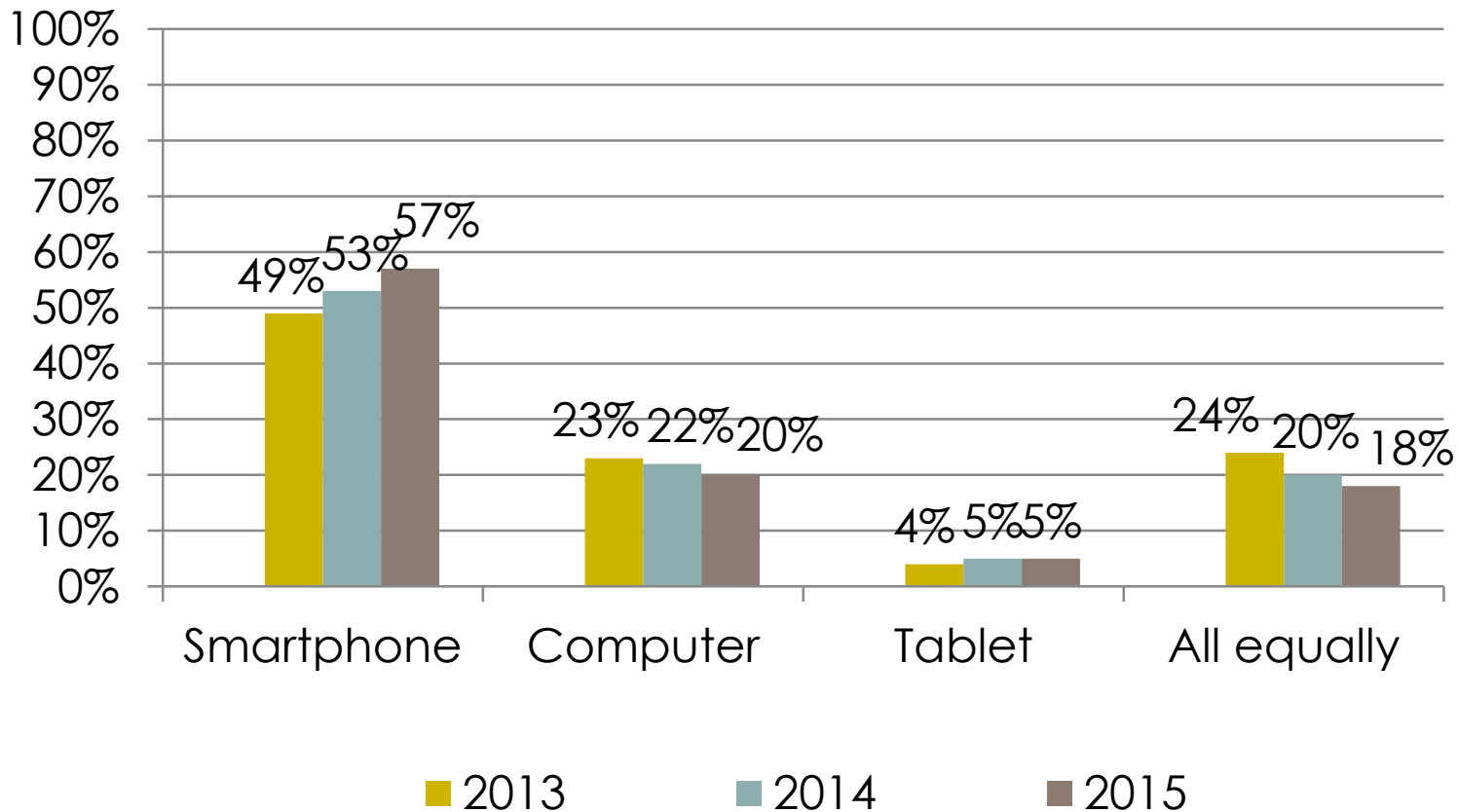
Technology Ownership



Technology Ownership

- When asked which of three types of technology they own, nearly all of those surveyed this year said they own a **smartphone** (99%) or **computer** (95%), while about seven in ten reported ownership of a **tablet** (69%).
- This year, for the first time in any of the three surveys, more respondents reported owning a **smartphone** than a **computer** (99% vs. 95%).
- **Tablet** ownership has now risen from 61% to 69% over the course of the three surveys.

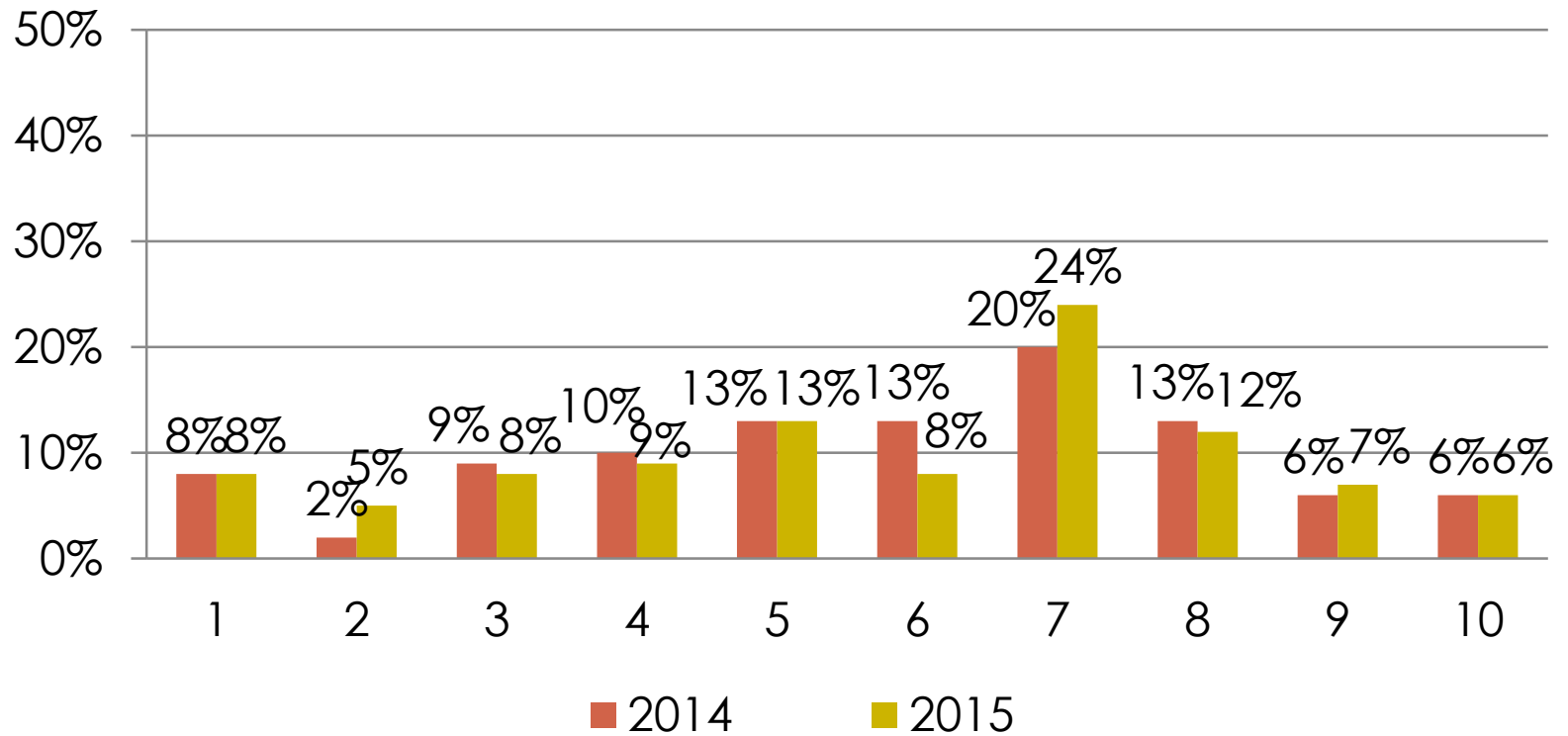
Technology Most Used



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.
- In this 2015 survey, a **smartphone**, at 57%, was used most often by respondents to participate in digital engagement, with a **computer** a distant second, at 20%.
- Since the original 2013 survey, each subsequent survey has seen a four-point increase in a **smartphone** being named as respondents' primary technology for digital engagement (from 49%, to 53%, to 57%).

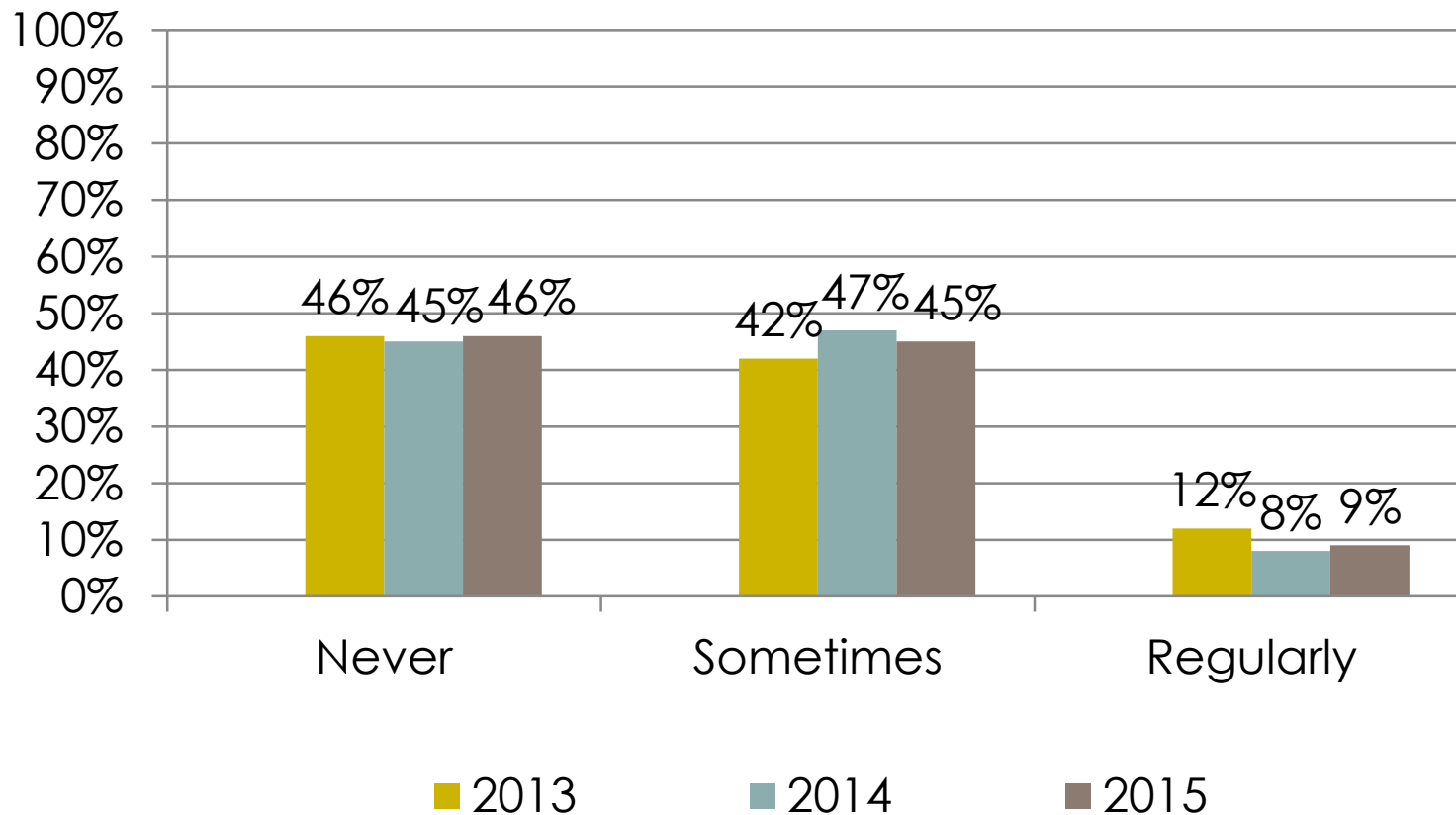
Smartphone “Addiction” Level



Smartphone “Addiction” Level

- Beginning in 2014, a survey question measuring respondents’ level of “addiction” to their smartphones was added.
- Using a 1 to 10 scale in which 1 means “Not At All Addicted” and 10 means “Extremely Addicted,” a combined 49% of this 2015 survey’s respondents said their level of addiction to their smartphone is **at least a “7.”**
- The 49% of participants in this 2015 survey who said their smartphone addiction level is **at least a “7”** represents a slight increase from 45% last year.

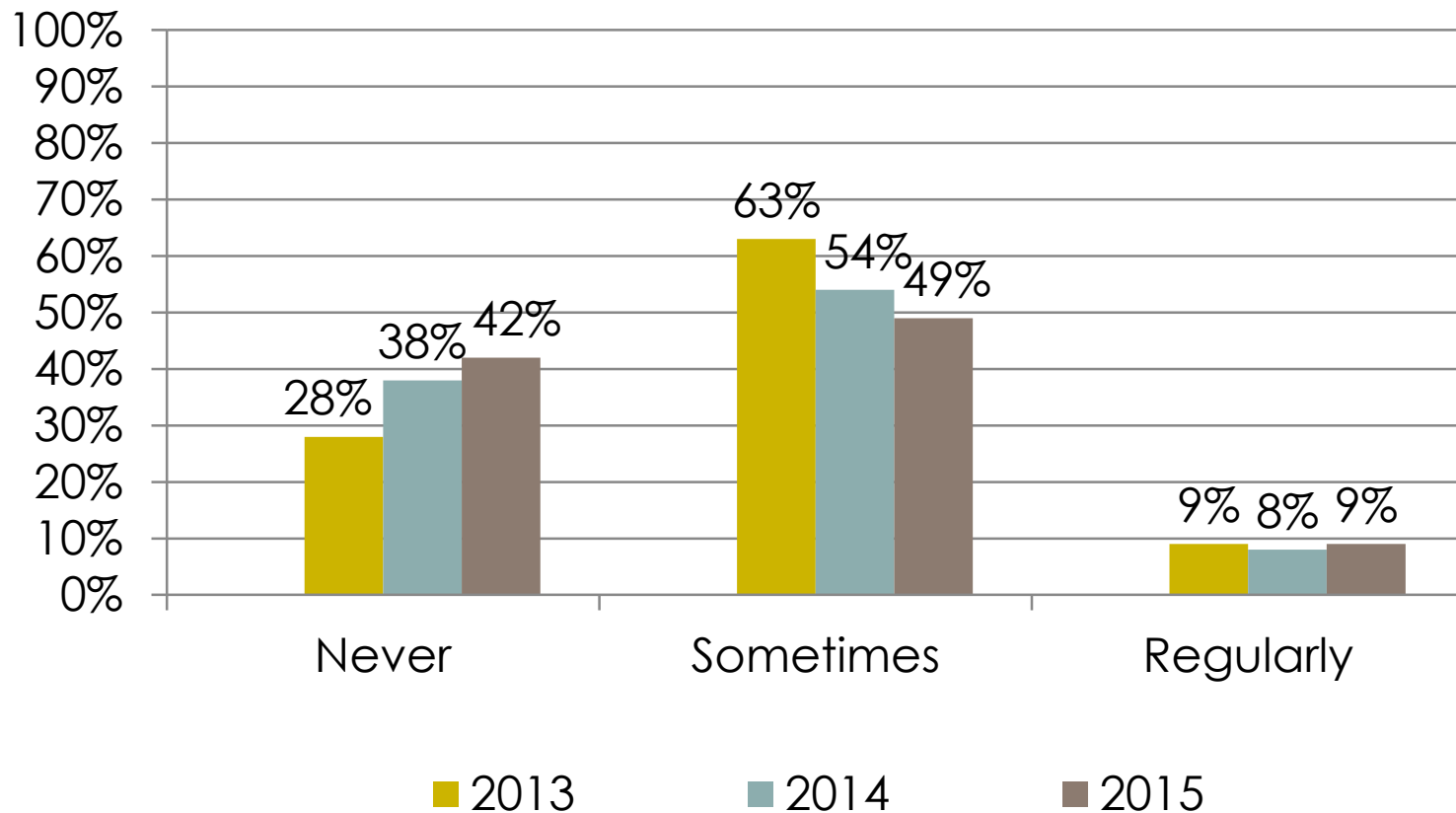
Clicking Digital Ads



Clicking Digital Ads

- In this 2015 survey, 9% of respondents reported that they click through on digital ads on their computer, smartphone or tablet **regularly**. Basically the same percentage of those surveyed either click on digital ads **never** (46%) or **sometimes** (45%).
- The degree to which survey participants click through on digital ads has changed little since the original 2013 survey.

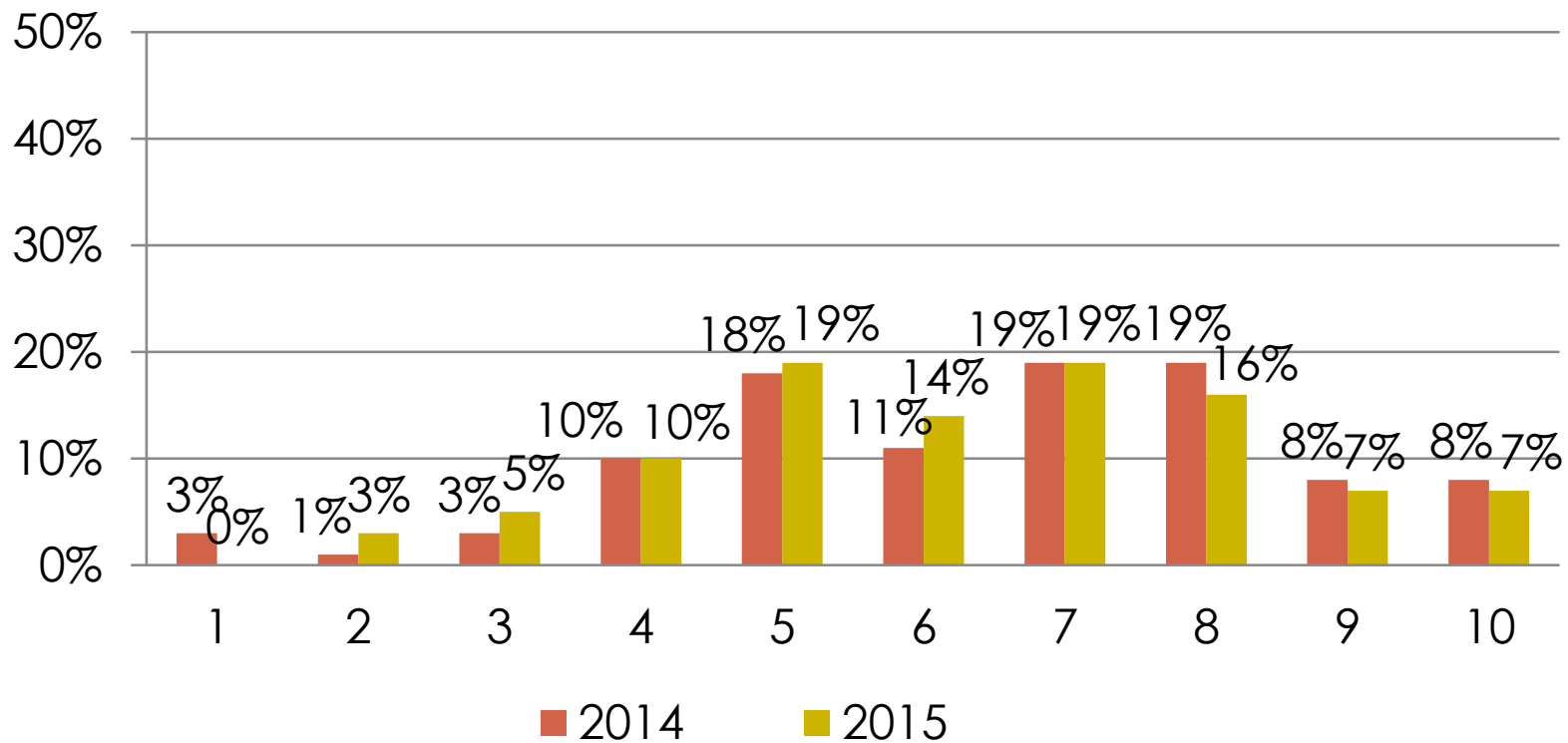
Clicking Links: Promo Emails



Clicking Links: Promo Emails

- When it comes to promotional emails, about one in ten participants surveyed this year, 9%, said they **regularly** click through on links in promotional/marketing emails; this compares to 49% who report **sometimes** clicking through on such links, and 42% who **never** do so.
- With a four-point increase since the 2014 survey, the percentage of respondents who said they **never** click through on links in promotional/marketing emails has now risen from 28% in the original 2013 survey, to 42% this year.

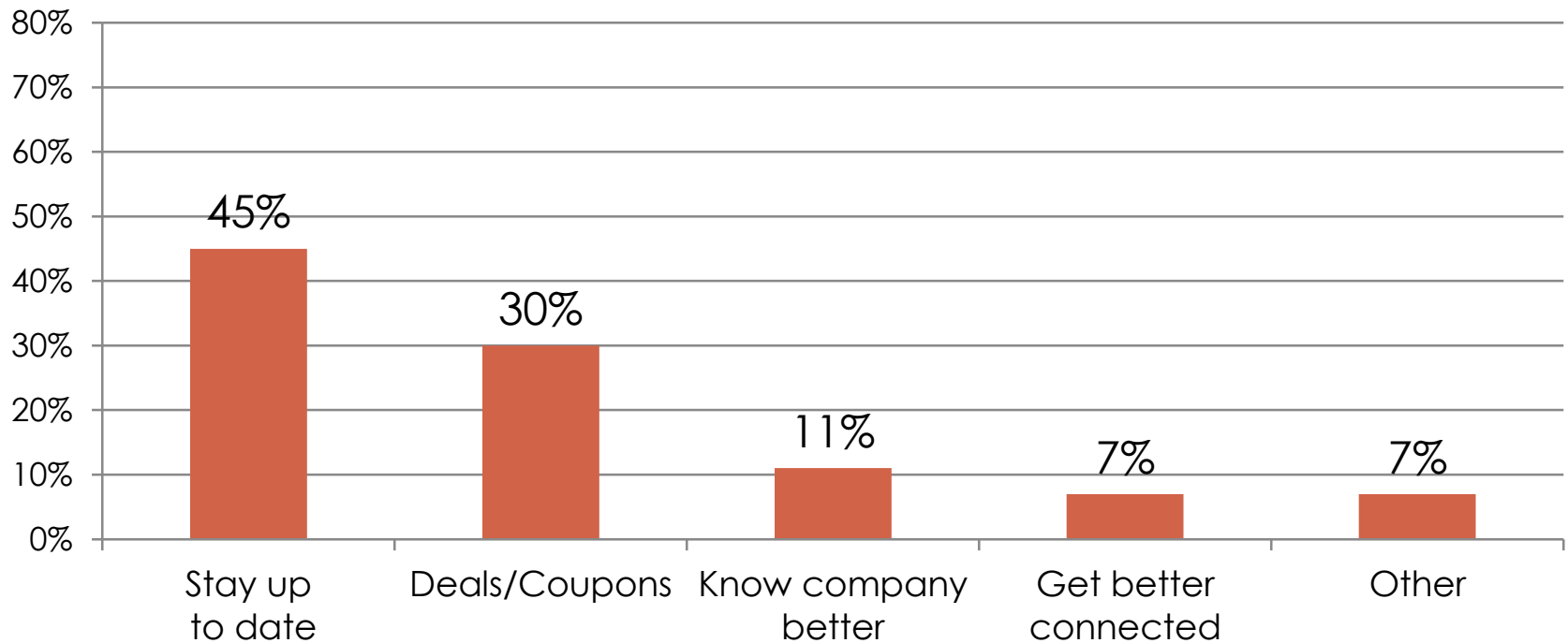
Digital Security Level



Digital Security Level

- Survey participants' sense of security when digitally engaged was measured in a survey question first asked in 2014.
- On a 1 to 10 scale in which 1 means "Not At All Secure" and 10 means "Extremely Secure," about half of the respondents combined this year rated their sense of security as **at least a "7"** (49%).
- The percentage of survey participants who rated their security when digitally engaged as **at least a "7"** decreased slightly as compared to last year (from 54% to 49%).

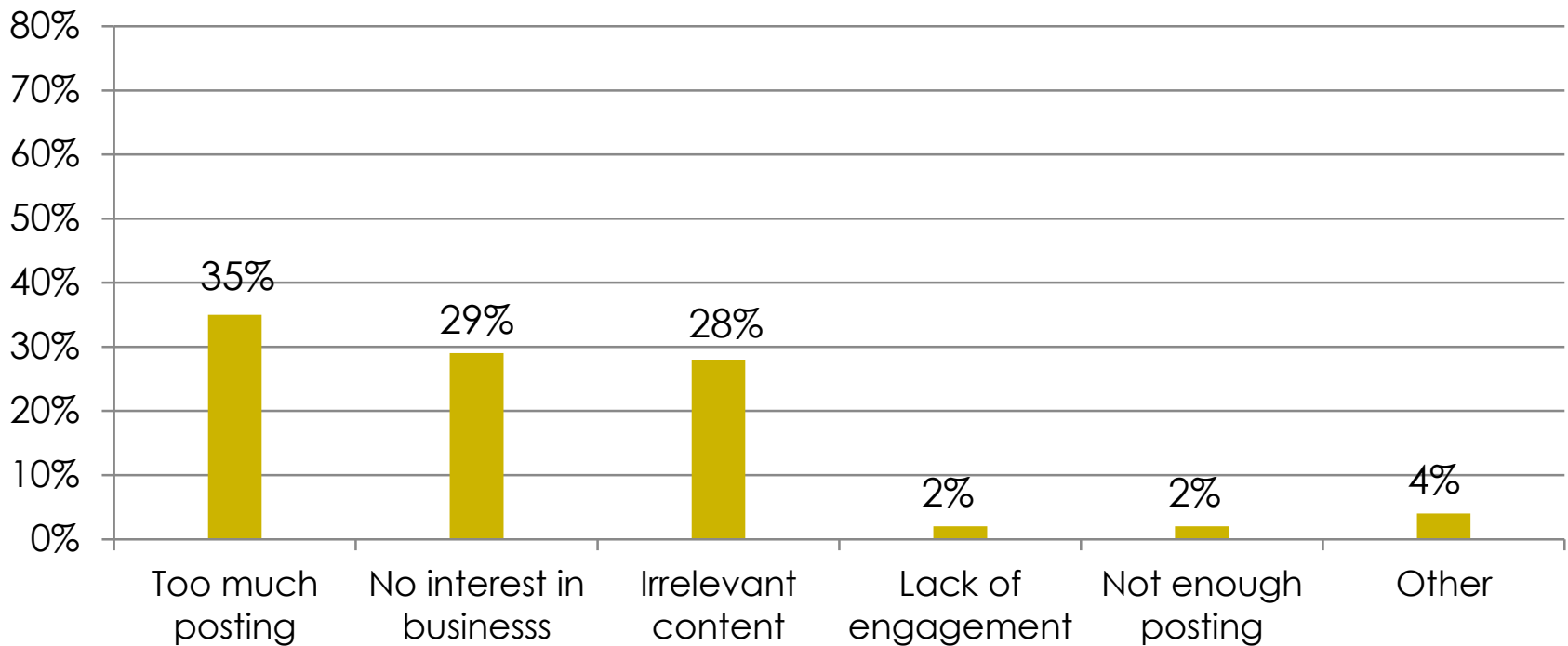
Why Follow A Business



Why Follow A Business

- In a new survey question this year, respondents were asked the number one reason they follow a business on social media.
- By a 15-point margin, respondents' leading reason for following a business on social media was **want to know more and stay updated on services, products and offerings** (45%).
- The other reason cited by a fair number of people for following a business on social media was **care about deals/coupons** (30%).

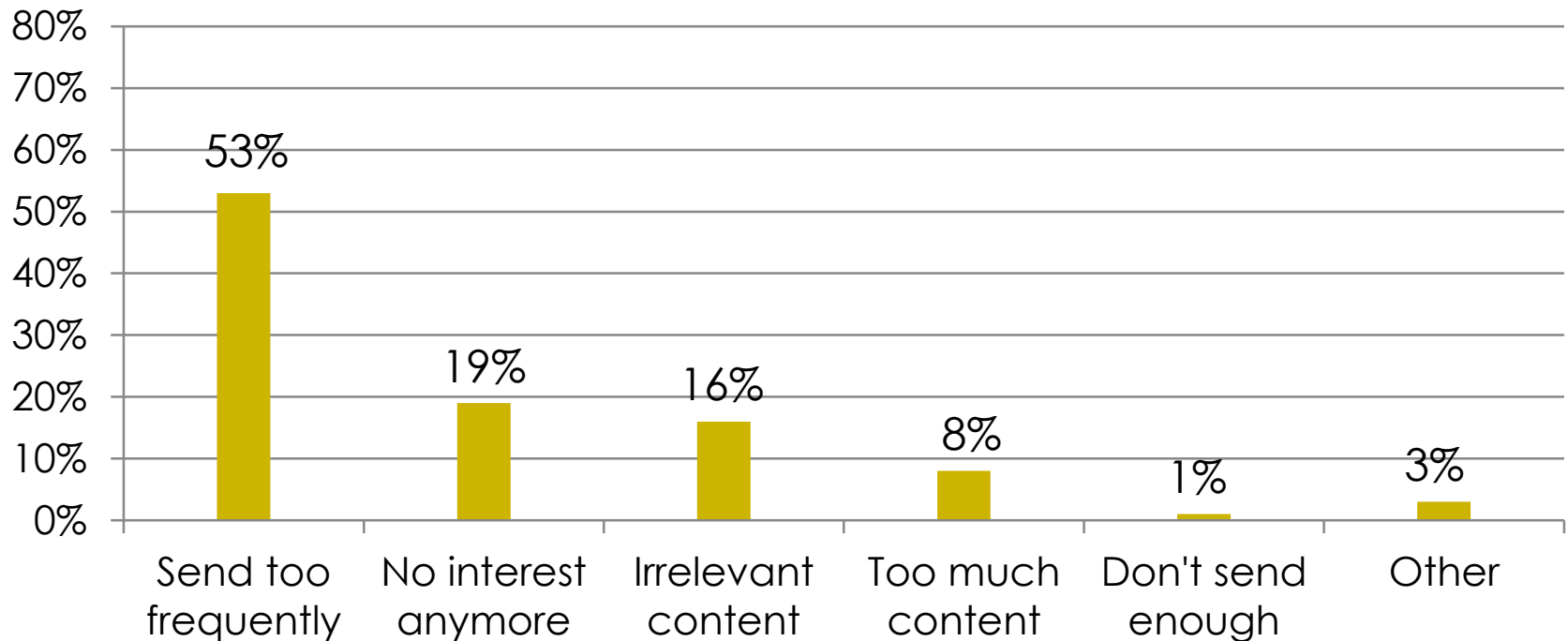
Why Quit Following A Business



Why Quit Following A Business

- After saying why they would follow a business on social media, respondents indicated the number one reason they would quit following a business on social media.
- **Too much posting (35%), no interest anymore in that organization (29%) and irrelevant content (28%)** were named fairly equally often as the leading reason a survey participant would quit following a business on social media.
- While 35% of the survey sample would quit following a business because of **too much posting**, only 2% would quit following because the business is **not posting enough**.

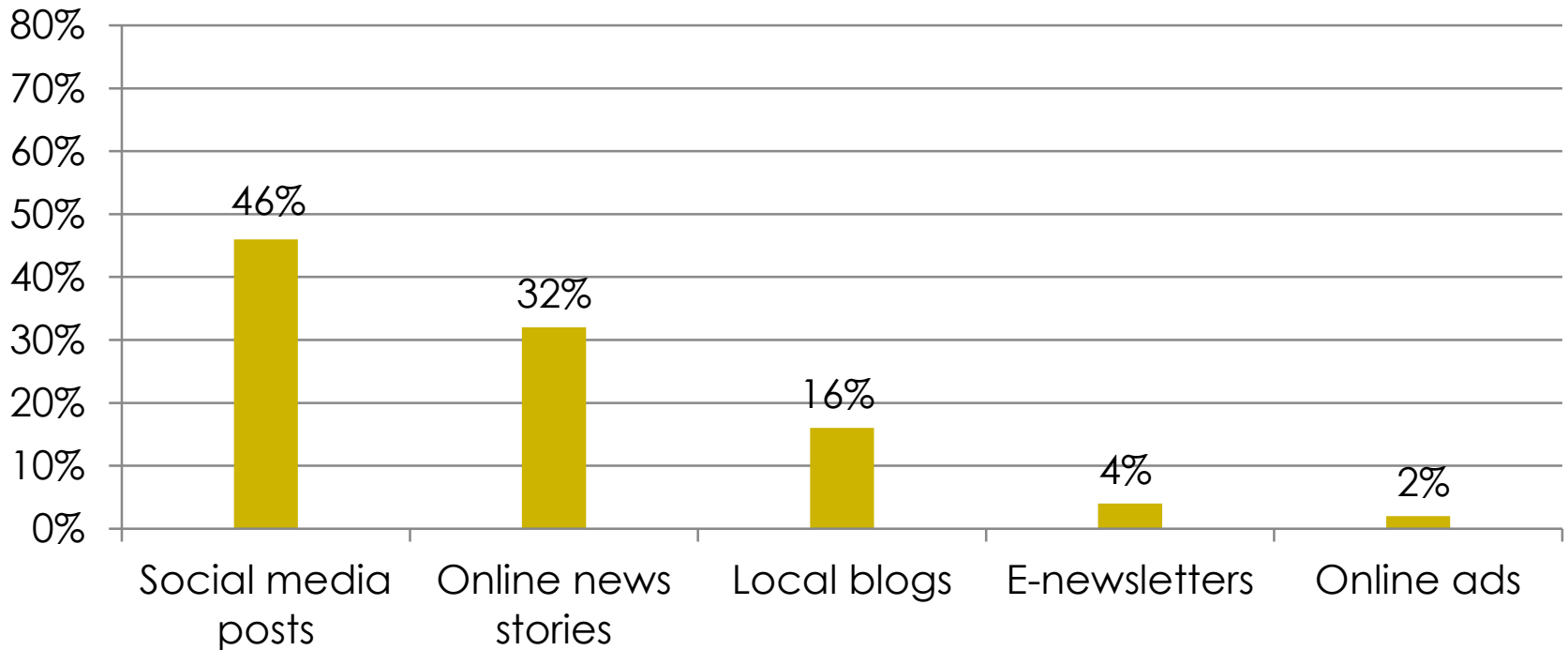
Why Unsubscribe To E-Newsletter



Why Unsubscribe To E-Newsletter

- Another new 2015 survey question asked respondents the number one reason for unsubscribing to an e-newsletter.
- As far as why they would unsubscribe to an e-newsletter, over half of those surveyed cited **send too frequently** as the leading reason they would unsubscribe (53%).
- **Sending too frequently** far outdistanced the next most-often mentioned reasons someone might unsubscribe to an e-newsletter – **no interest anymore** (19%) and **irrelevant content** (16%).

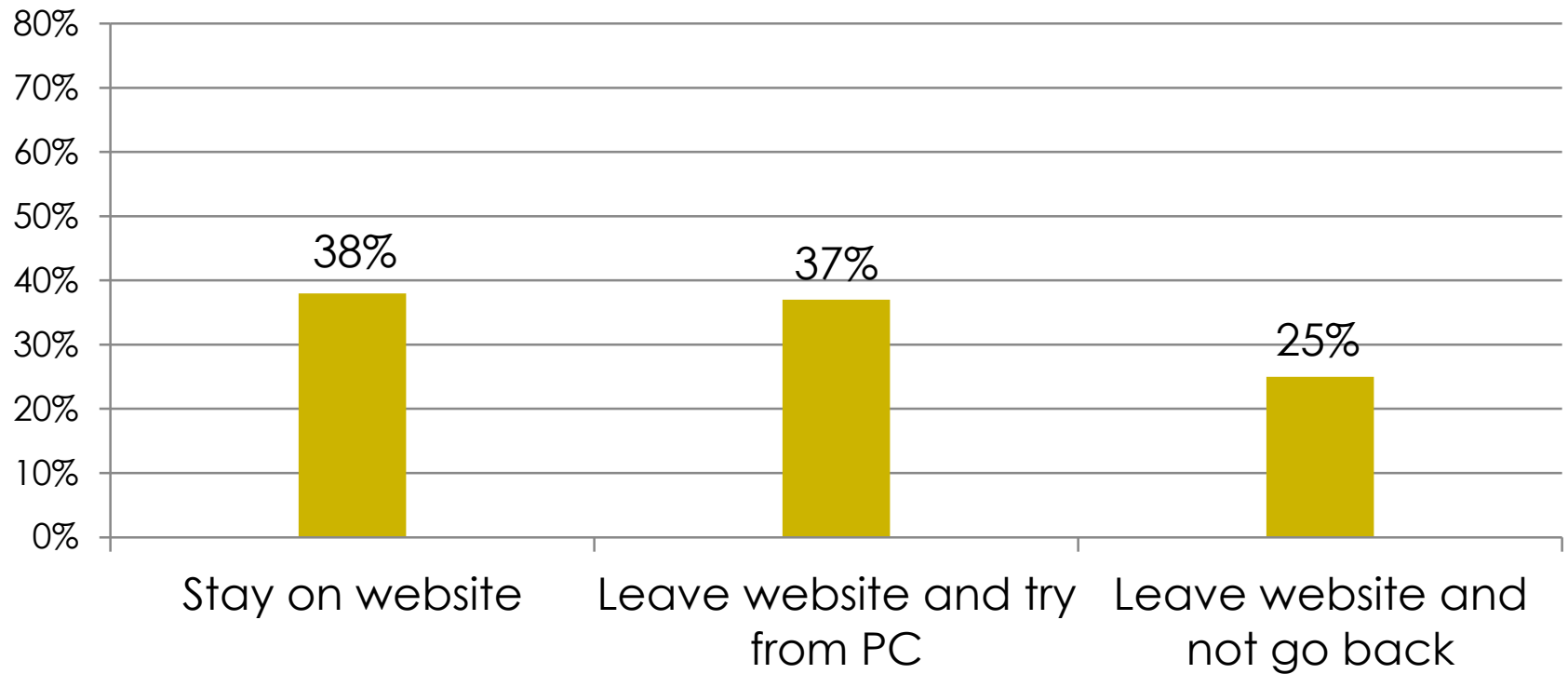
How Find Out What's Going On



How Find Out What's Going On

- If they wanted to find out what's going on in the city this weekend, a new question this year gave respondents five sources where they might turn for such information.
- A combined 78% of respondents said they would most likely either seek out **social media posts** (46%) or **online news stories/listings** (32%) to find out what's going on in the city this weekend.
- Few survey participants said **e-newsletters** or **online advertisements** would be their source of learning what's going on in the city (4% and 2%, respectively).

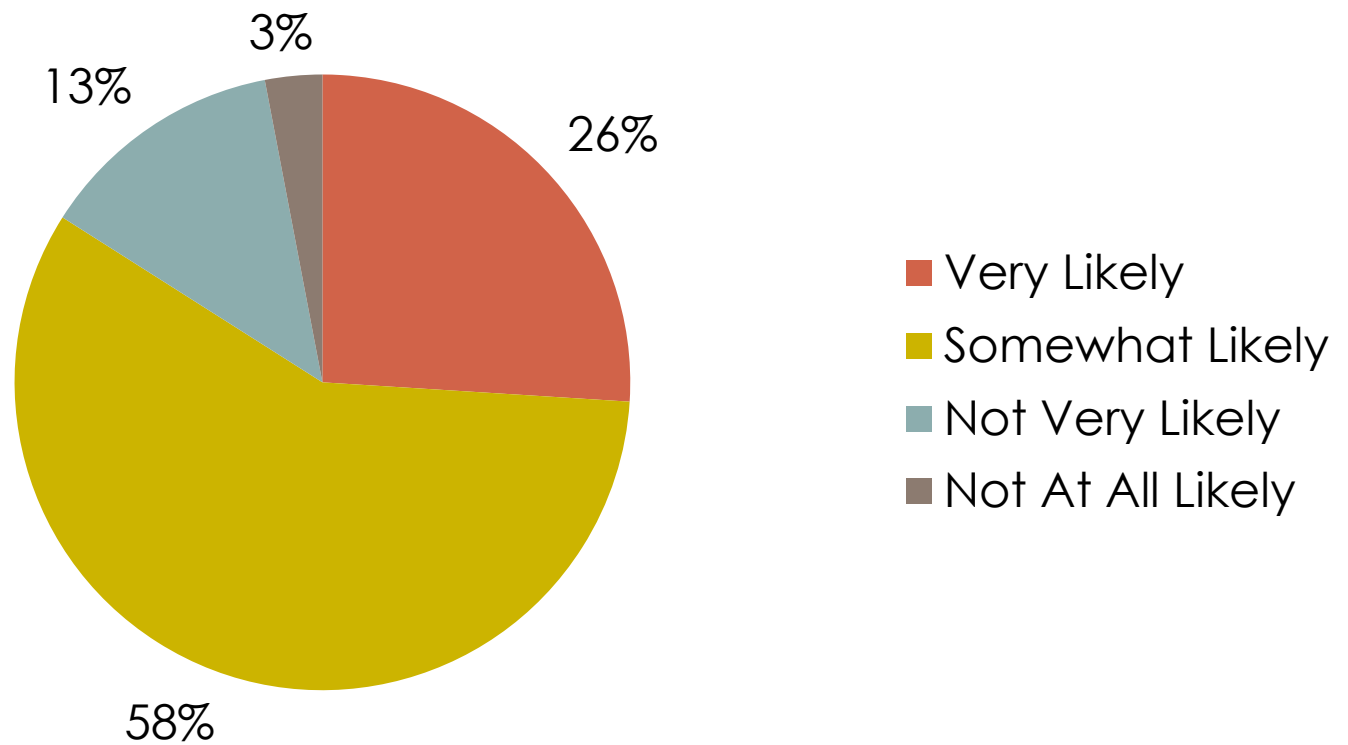
If Website Not Mobile-Friendly



If Website Not Mobile-Friendly

- In another new survey question this year, respondents were asked what action they typically take if a company's website isn't mobile-friendly.
- There was no one clear action that respondents said they typically take if a company's website isn't mobile-friendly.
- Not only did basically equal segments of the survey sample say they would **stay on the website and navigate as best they can** or **leave the site and try again on their computer** if a company's website isn't mobile-friendly (38% and 37%, respectively), but the other response option provided also received a fair number of mentions as an action that would be taken – **leave the site and not go back** (25%).

Impact Of Social Media Buzz On Visitation



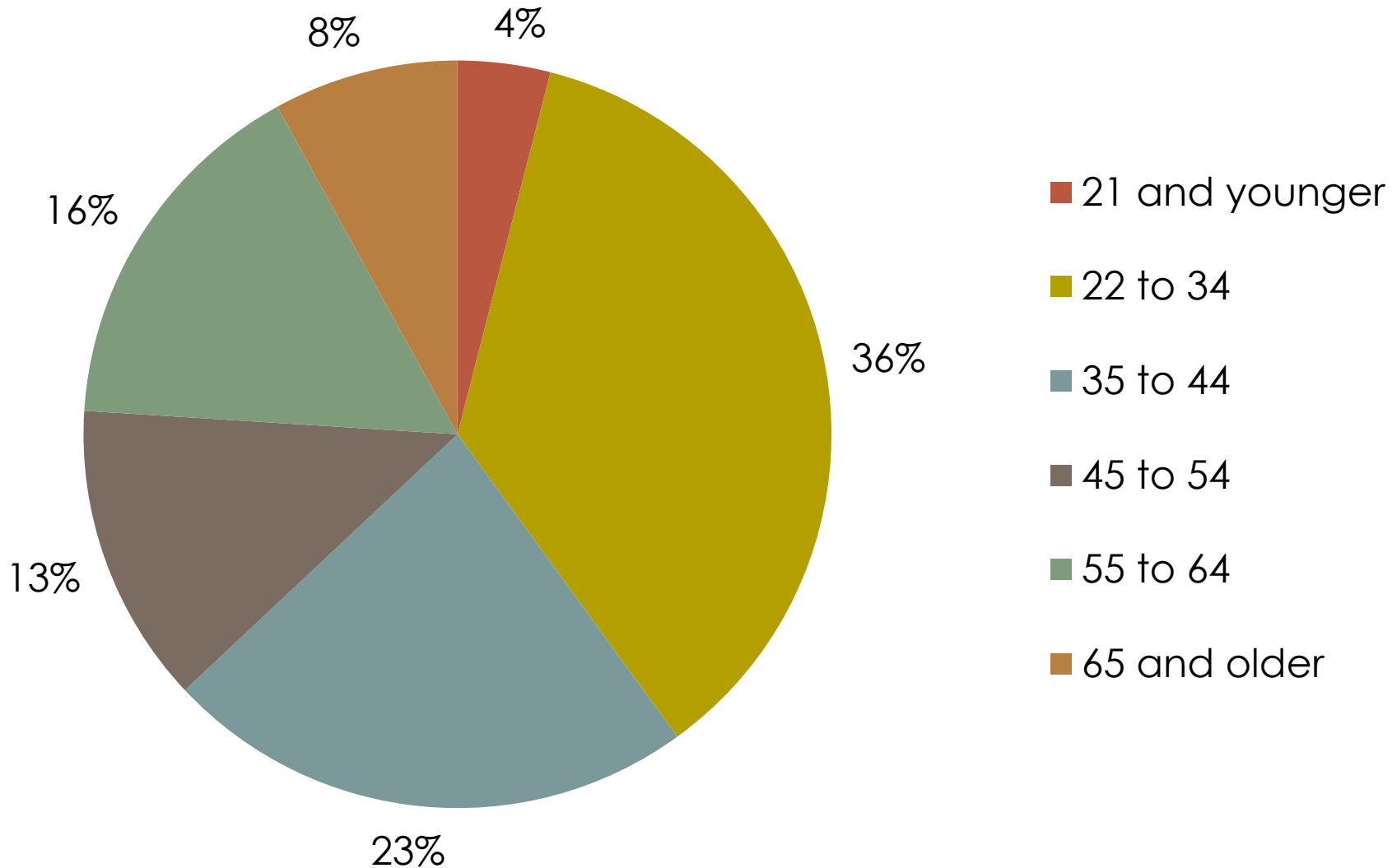
Impact Of Social Media Buzz On Visitation

- One final new survey question this year asked respondents how likely they are to visit a restaurant, store or event based on social media “buzz” alone.
- Although only 26% of those surveyed said they would be **very likely** to visit a restaurant, store or event based on social media “buzz” alone, a sizeable percentage of respondents, 58%, said they would be **somewhat likely** to make such visits based on social media “buzz” alone.
- Taken together then, the vast majority of respondents, a combined 84%, could be said to be **likely** to visit a restaurant, store or event based on social media “buzz” alone – 26% **very likely**, 58% **somewhat likely**.

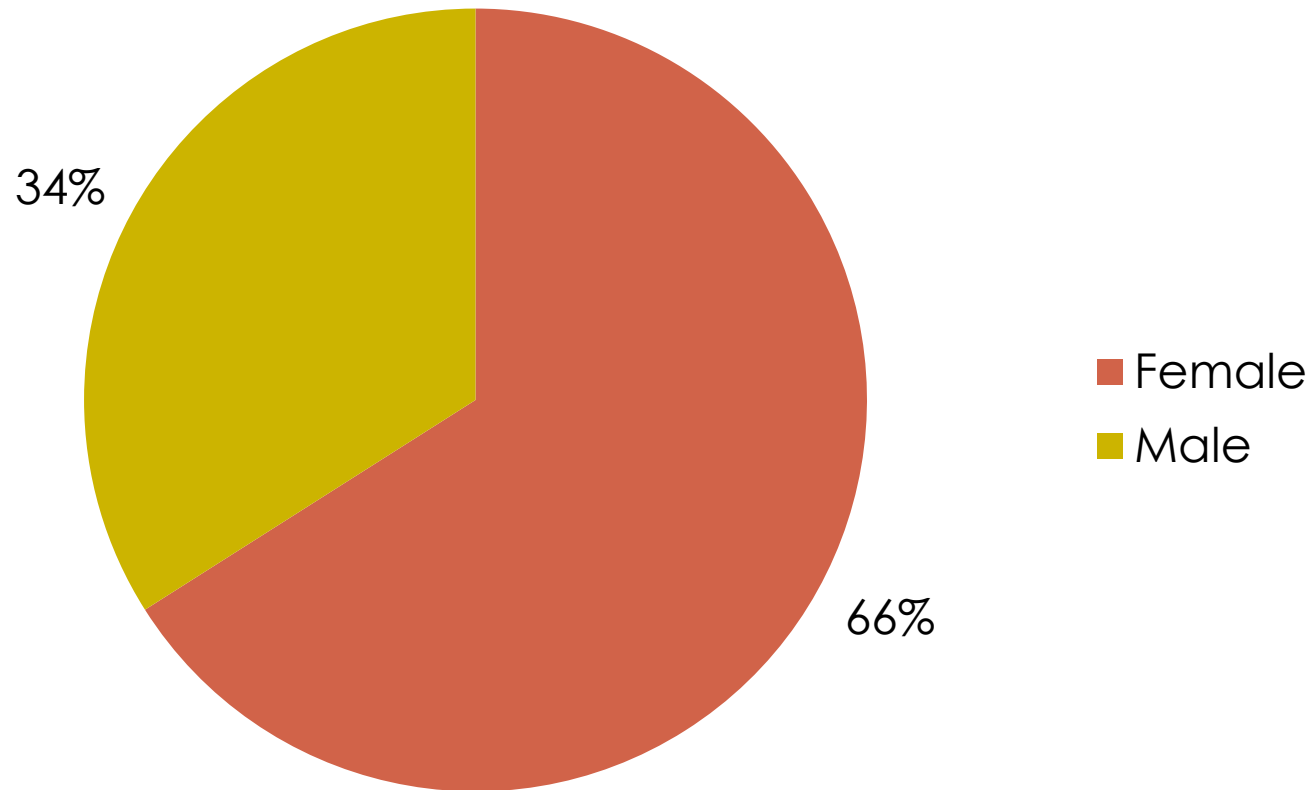
Survey Demographics

- The largest segment of respondents, 36%, was between 22 and 34 years old.
- Two-thirds of those surveyed, 66%, were female, 34% male.
- About eight out of ten respondents live in Shelby County (81%), while 9% reside in DeSoto County.
- In terms of respondents' home ZIP code, the three zip codes represented most often by the people participating in this survey were 38017 (15%), 38103 (13%) and 38104 (8%).

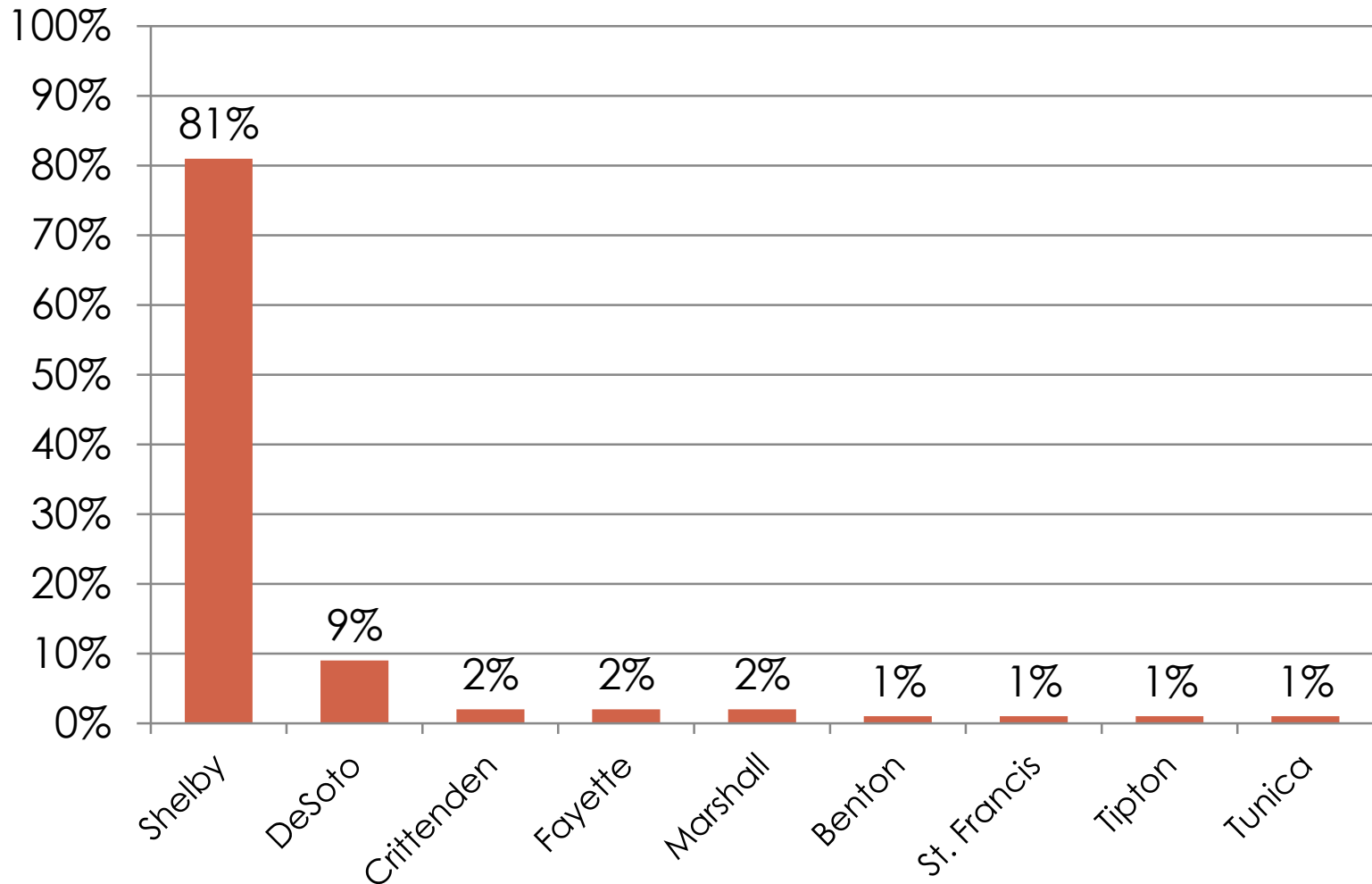
Survey Demographics



Survey Demographics



Survey Demographics



Survey Demographics

38017 (15% of all respondents)

38103 (13%)

38104 (8%)

38112 (6%)

38119 (6%)

38016 (5%)

38111 (5%)

38120 (5%)

38671 (5%)

38107 (4%)

38117 (3%)

38134 (3%)

38138 (3%)

38018 (2%)

38116 (2%)

38139 (2%)

38654 (2%)

1% or less each: 38002, 38004, 38066, 38114, 38122, 38125, 38133, 38135, 38611, 38637, 38672, 72364.

Thank you!



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