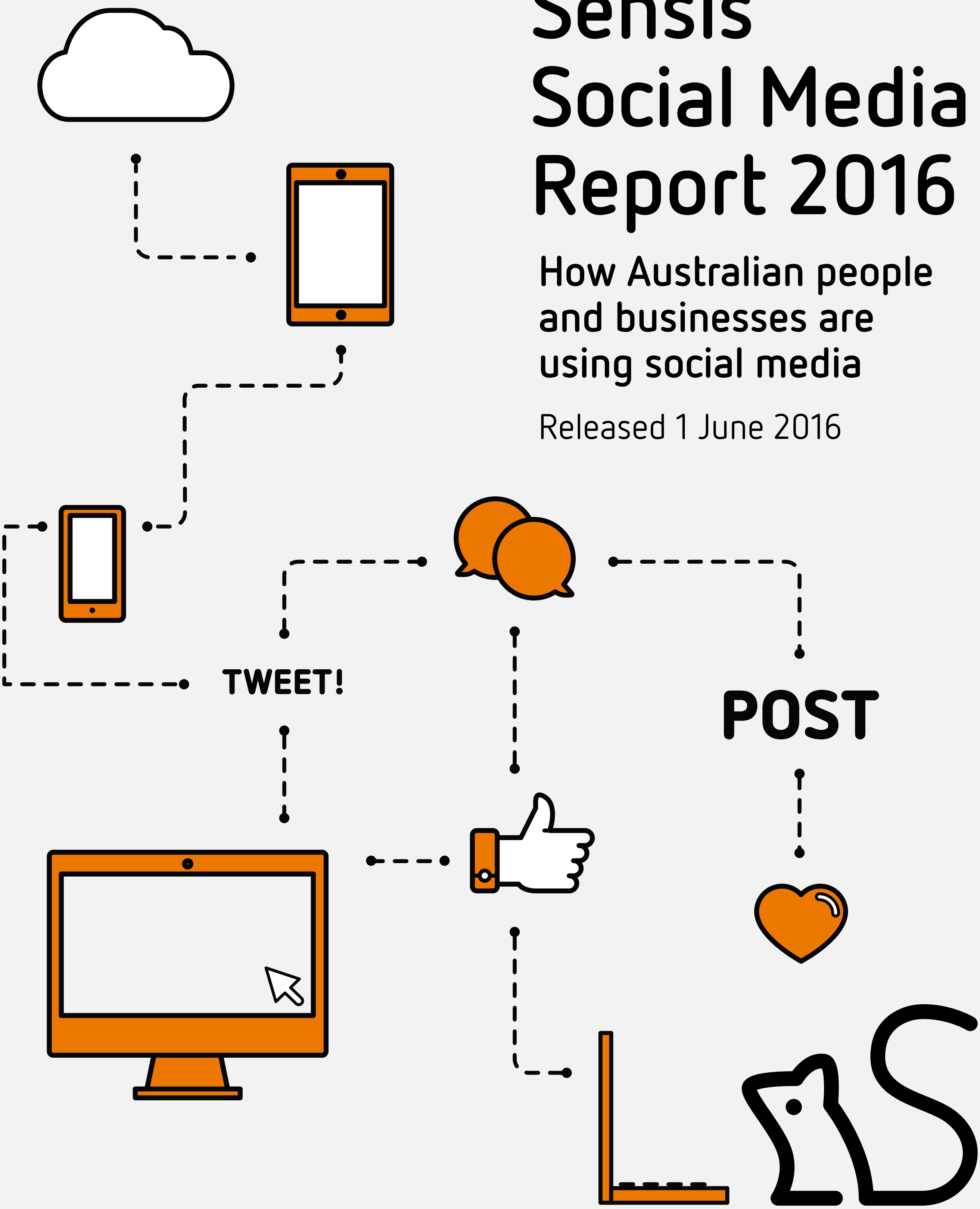
Sensis Social Media Report 2016

How Australian people and businesses are using social media

Released 1 June 2016



www.sensis.com.au/socialmediareport

Join the conversation:

@Sensis #SensisSocial

linkedin.com/company/sensis

sensis

Contents

Foreword

We're always excited about the release of our annual Sensis Social Media Report. Now in its sixth year, the report has become a crucial insight and benchmarking tool for all business owners.

The social media landscape in Australia continues to evolve rapidly for both consumers and businesses. When you consider that nearly three quarters of Australians are now on social media, it's clear this is more than just a passing fad.

Indeed, Australians are now spending more than half a day per week (12.5 hours) on Facebook alone, up four hours from last year. This should be a wake-up call for businesses that aren't yet on social media – this is where your customers are, and this is where you can engage with them. This is especially pertinent considering frequency of access is increasing, with most consumers accessing social media sites every day or multiple times per day.

And it seems like many businesses are taking notice, with an upsurge in the number with a social media presence for all business sizes (31% to 48% for SMBs, and 56% to 79% for large businesses). Of those not yet on social, a significant number plan on establishing a presence within the next year, highlighting that many businesses sense the risk of being left behind. There is still a gap, though, in how frequently consumers are using and engaging with social media as compared to businesses. This disconnect is a key opportunity for Australian businesses to get an edge on their competitors.

Social media is one of the only digital avenues where businesses can have a two-way communication with customers, giving them the opportunity to receive feedback, monitor sentiment and build a relatable brand personality. They can do all of this with minimal marketing spend, making social media one of the easiest and most cost effective channels to get in front of customers.

It's important businesses consider how consumers are accessing social media when considering their approach. For the first time ever, smartphones are the most popular device owned by consumers, having eclipsed laptops. When creating content, businesses must take into consideration where, when and how their audience is going to absorb that information and have a "mobile first" mentality.

But beyond optimising content for mobile, businesses should first have a clear understanding of who their target audience is. Younger people are still using social media differently to the older demographic, with a definite skew towards more visual platforms like Facebook, Instagram and Snapchat for 18 to 29 year olds, and LinkedIn and Google+ for 40 to 49 year olds.

Consumers can be overwhelmed by the amount of content appearing in their feeds, and it's no secret that the state of social media in 2016 means many platforms appear to give preference to brands that pay the most money for their content to be seen. With this in mind, it's more important than ever to ensure the content you produce – whether it be organic or paid – provides something of value to your audience.

Large businesses appear to understand this importance, with more than twice as many measuring their return on investment for social media as last year (29% to 61%). However, ROI measurement remains very low amongst SMBs (21% for small and 27% for medium).

Maintaining a business presence on social media is likely to be even more data driven in the future, with a range of new tools coming on line to help businesses manage their social media presence. By choosing the right tools and the right partners, there are some fantastic opportunities for savvy small business owners to stand out and succeed on social.

We hope you enjoy the 2016 Sensis Social Media Report – please follow us on Facebook, Twitter and LinkedIn to share key insights, and join in the discussion using #SensisSocial.

Alice Mentiplay, General Manager Digital, Sensis

Executive summary

About this report

Sensis surveyed 800 Australian consumers and 1,100 Australian businesses to continue this landmark annual study on how social media channels are being used.

For the purposes of this report, the term social media refers to:

- Social networking platforms, such as Facebook, Twitter, LinkedIn and Google+.
- Online blogs and online rating and review mechanisms.

The findings detailed in this report aim to help Australian businesses make more informed decisions about how to use these channels to engage with consumers.

Australians and social media

Australians own an average of three Internet-enabled devices which underlines our strong appetite for online activity. Smartphone penetration is up 6 percentage points to 76 percentage points, overtaking the laptop to become the most commonly owned device, which is down 5 percentage points to 70%. There was little change in ownership of tablets (53%) and desktop computers (54%). Internet-enabled TVs have increased their appeal by 4 percentage points to 29%. Meanwhile, ownership of devices such as the iPod touch is down 5 percentage points to 17%. The above indicates an increasingly diverse nature of device ownership.

The penetration of social media has not really changed in the last three years, with 69% of Internet users having a social media profile. However, those people are using it more than ever as a connection tool. Fifty percent do so daily, with just over a quarter checking in more than five times a day. For almost half (49%) social networking is one of the first things they do each day and this behaviour has been growing steadily since 2012.

Some new questions in the survey examined the role social media plays in meeting new people. Seventeen percent of people said they have connected with people they did not know on social media and 10% have dated someone they met online. Only 2% admitted to ending a romantic relationship online while twice as many said it had happened to them.

As reported before, nearly everyone uses social media at home, with other locations not uncommon. Thirty nine percent access social media while watching TV and this happens across a wide variety of program types. Twenty-eight percent discuss TV programs on social media while watching them and they feel this increases their enjoyment of those programs.

The smartphone continues to grow as the most likely device people use to access social media (72%). When on a smartphone, people prefer to access social media through an app as opposed to a website. The proportion who log-in on their smartphones is only marginally higher than recorded previously but there are now more people who own smartphones. In the 18-29 and 30-39 age groups smartphones are used for social media interaction by over 90% of people.

Facebook has maintained its almost ubiquitous appeal - 95% of users. The average number of times people access Facebook has remained relatively steady at 32 times a week, but the amount of time spent on each occasion has increased from 17 to 24 minutes. This means users are spending over twelve and a half hours a week on the site on average, which is four hours more than last year. This survey we also found that the average number of Facebook friends is 272 and 50% of social media users nominate Facebook as their favourite site, far ahead of any others. The main attraction to Facebook is contact with family and friends but user-friendliness is also a prominent appeal.

The penetration of Twitter is 2 percentage points higher at 19%. It is the content and user-friendliness which appeals most to those that use Twitter.

Executive summary

Instagram (31%) is on a growth trend, almost doubling its reach since 2013. The main attractions are the visual content and the ease of use of the platform. Privacy and security features also play a role. This platform has really captured the younger demographic, used by 58% of 18-29 year olds.

Relative to last year, penetration of LinkedIn (24%) and Google+ (10%) was lower. The results for Google+ are influenced by the fact that it was described in more detail this year during the survey in order to avoid any confusion around Google+ and Google search. We believe confusion around the two may have influenced the results in previous surveys, particularly among older users.

For respondents using any of the five sites (Facebook, Twitter, LinkedIn, Google+ or Instagram), the average number of friends, contacts or followers they have on those sites overall exceeds four hundred. Forty six percent admit to having deleted friends before, while the average proportion of friends, contacts or followers with whom face to face contact has occurred in the past year was estimated to be 39%, which is exactly the same as in 2015.

Almost one in four (24%) admit their time spent social networking has increased in the past year versus 16% who have reduced this behaviour. Nearly a third (31%) feel they spend too much time on social media but twice as many (62%) are comfortable in this respect.

Despite consumers embracing social media more deeply in the last year, it appears they are now using it less for shopping research purposes such as finding out about brands and businesses (16%), researching products or services they might want to buy (14%) or holiday and travel offers (12%). However, where such research led to a purchase, more people indicated buying online (71%) than in the last three years.

Just over one in three claim to follow a social networking group associated with a particular brand or business which is in line with recent survey results. That is also true regarding the proportion saying they are not after anything from brands or businesses they follow on social media. It is also revealing that people are becoming less expectant of benefits like discounts (41%), give-aways (30%) and coupons (26%) than was apparent three to four years ago. Nevertheless these benefits, plus others such as exclusive offers (30%), tips and advice (26%) and event invitations (26%) remain popular and brands should therefore consider them as possible engagement and marketing tools.

There is also more trust towards brands that interact with customers in a positive way on social media, as well as make their content engaging, relevant and keep it regularly updated. One risk is excessive content, which was identified as one of the more influential factors by those who stopped following any company or brand.

It therefore appears to be more a question of how, rather than if, businesses and marketers should use social media to connect and engage with consumers meaningfully and effectively.

Views are polarised towards businesses advertising on social media, however a good proportion have no problem with sponsored posts from businesses they follow (27%) or are happy to see ads (34%) or will click on them occasionally to find out more (43%). Forty one percent also agree they will inspect a brand's social media presence before making an online purchase if they had not purchased from their website before. Therefore, social media advertising or sponsorship may not be effective for everyone but it is an important marketing tool for brands.

Brands also need to pay close attention to ratings and reviews with 31% of social media users rating an organisation's products or services in the last year, which is higher than in any prior survey. The average number of ratings provided last year was down from 14 to nine but this still suggests people provide ratings at least every two to three months.

Online blogs and reviews remain a fairly widespread influence on purchasing decisions with 60% of social media users claiming to read them before making a purchase. Fifty eight percent will look at up to five reviews before making a decision, which means around four in 10 read even more. Similar to the results from last year we identified that 27% of online users post blogs or reviews. Their estimated average number of posts has nearly doubled in the last year to around 14. This underlines the need for businesses and brands to do everything they can to get on the front foot and avoid negative reviews if they can.

Executive summary

Australian businesses and social media

The uptake of social media by Australian businesses has grown in the last year. Forty eight percent of small and medium businesses have a social media presence compared with 31% last year, while 79% of large businesses do, which compares with 56% last year. Consumers (69%) remain more engaged with social media than businesses, however, and their frequency of use has been increasing.

The great majority of small, medium and large businesses using social media have a Facebook profile – between 79% and 89%. LinkedIn is used by more than half of medium and large sized businesses. Over four in 10 medium sized businesses use Twitter (43%), while this figure increases to 61% for large businesses. Instagram is also reasonably popular among medium (28%) and large (42%) sized businesses. YouTube (41%) has a similar penetration in large businesses. Instagram is also now used by over a quarter of medium sized businesses (28%) but its penetration in the small business segment remains much lower (12%). Platforms other than those mentioned are yet to gain widespread appeal in the business sector, although Google+ has been adopted by almost one in five large businesses.

As previously discovered, internal management of social media profiles is much more common than outsourcing this responsibility, although the latter approach is gaining some favour in medium sized businesses. In small businesses, the business owner is still the most likely manager of social media but the role played by the marketing function within the organisation is growing. In medium and large businesses, responsibility for social media still lies with the marketing department much more than elsewhere but the communications department is becoming more involved, especially in large businesses.

Frequency of updating social media profiles remains greater for large businesses, which tend to make daily updates, while most SMBs spread this task out over a week.

Last year we found most businesses use social media platforms as a two way communication channel but this appears to have declined across the board. This is much more common in large businesses - 76% compared to 46% of SMBs. A majority of all businesses seek feedback or comments in order to engage with customers and this has become more pronounced by SMBs in the past 12 months.

Last year we saw that quite a few businesses with social media lacked knowledge and direction about how to use it effectively for their business. This appears to still be the case, particularly for SMBs:

- Just over one quarter of SMBs and one third of large businesses say they have invested money in social media but don't know how much.
- Only 21% of small businesses and 27% of medium sized businesses measure their ROI in social media compared to 61% of large businesses.
- Thirty one percent of small businesses and 36% of medium sized businesses have developed a strategic plan for their social media compared to 76% of large businesses.

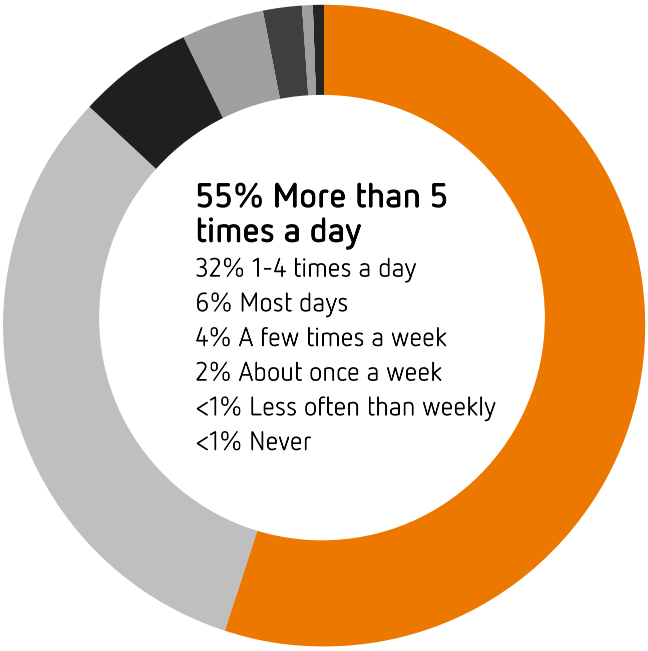
The most popular approach to attract traffic to their profiles (by businesses of all sizes) is including links to social media on their website. Another relatively common technique used by businesses for driving traffic (especially by large businesses) is to like, follow or subscribe to others' social media sites.

Engaging the public through paid advertising is also growing, primarily among large businesses, with 61% advertising in the past year. Large businesses are also more likely to have used other marketing strategies such as directory links, competitions and events. Over eight in 10 of all businesses who advertise on social media have placed an ad on Facebook. Even though more than 50% of consumers claim to ignore such advertising this appears to be on a downward trend. This may help explain why a majority of SMBs (58%) and nearly all large businesses (98%) who have advertised believe it has been effective.

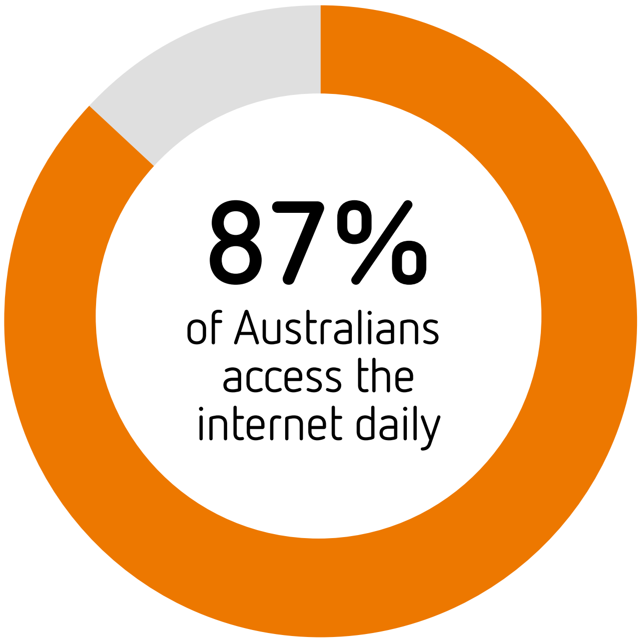
Many hesitant SMBs are now embracing social media, with even more intending to add a presence in the year ahead. Businesses are increasingly convinced that social media investment will help increase sales – 62% of SMBs and 68% of large businesses.

Report snapshot

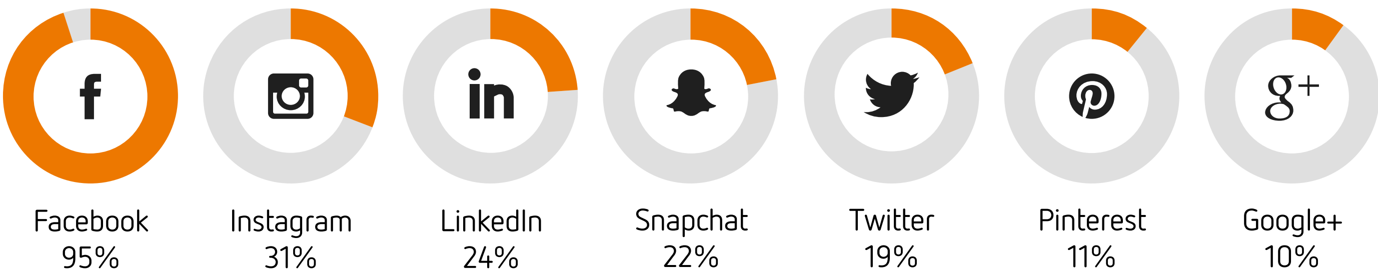
Frequency of internet use



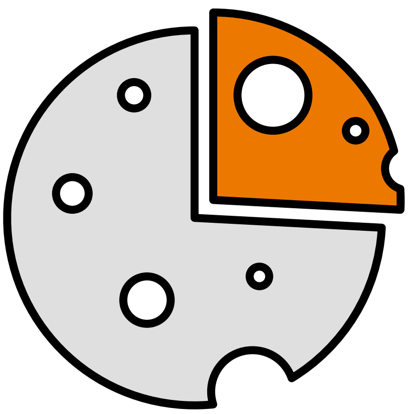
Proportion that access the internet daily



Social networking sites used this year

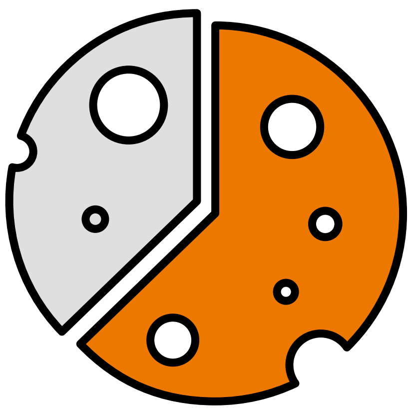


Frequency of using social networking sites



26%
More than five times a day

When we socially network



63%
After work/in the evening

Report Snapshot

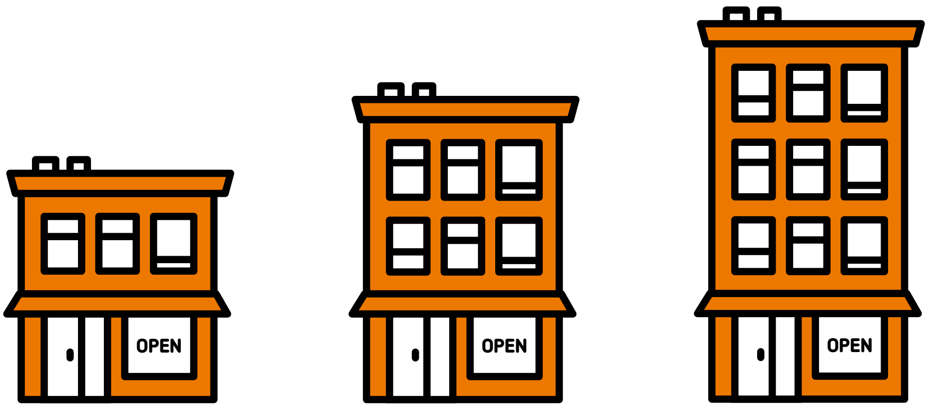
Where we socially network at home

69%	Lounge/living room
42%	Bedroom
29%	Study
22%	Kitchen
12%	Toilet
9%	Bathroom

When we socially network

63%	After work/in the evening
49%	First thing in the morning
36%	Lunchtime
35%	Last thing before I go to bed
33%	Breaks
22%	During work
18%	Commuting

Proportion of businesses that have a social media presence

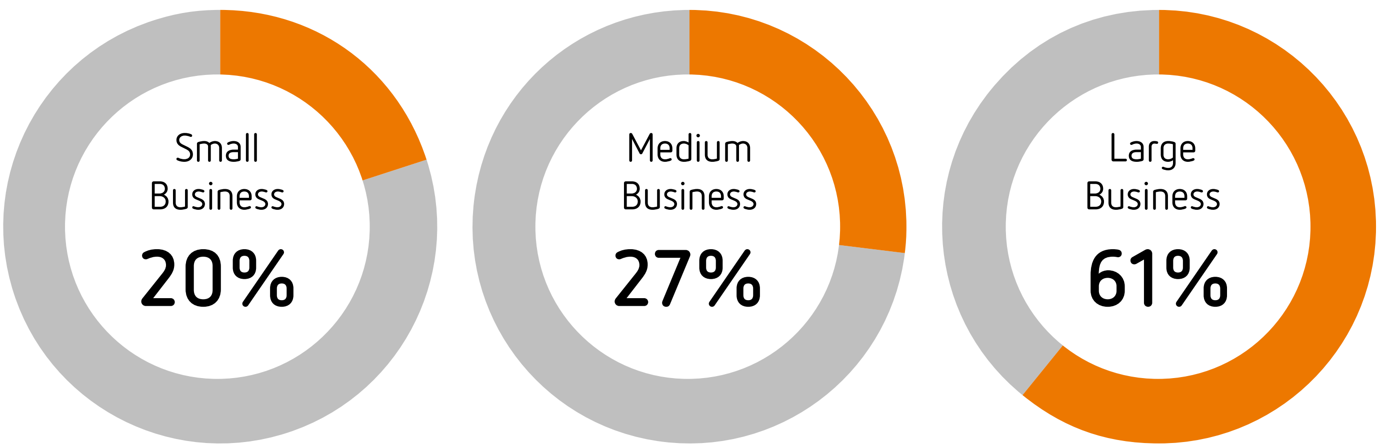


48% Small Businesses

54% Medium Businesses

79% Large Businesses

Proportion of businesses with a social media prescence that paid to advertise



Methodology

This report contains the results of research conducted by Di Marzio Research and TKW Research Group from late February to early April 2016.

Consumer survey

This research consisted of a telephone survey with 800 randomly selected Australians. Quotas were applied to provide for adequate representations in each age group as well as genders and location to ensure coverage across metropolitan and regional areas in each state and territory. The interview fieldwork was conducted between February 26 and April 7, 2016.

Business survey

The findings are based on interviews with 1,000 SMB and 100 large business proprietors / managers across Australia. The data for the SMB sample has been weighted* based on business size, industry and location to ensure the sample is reflective of the actual small and medium business population across Australia. Interviews were conducted during the period of February 26 to April 7, 2016.

Sample size - consumer

State	Sample #
New South Wales	161
Victoria	141
Queensland	120
South Australia	100
Western Australia	100
Tasmania	81
Northern Territory	47
Australian Capital Territory	50
Total	**800**

Gender	Sample #
Males	400
Females	400
Age	
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**

Sample size – business

Number of employees	Sample #
1 to 2 employees	365
3 to 4 employees	163
5 to 9 employees	193
10 to 19 employees	179
Total small businesses	**900**
20 to 99 employees	84
100 to 199 employees	16
Total medium businesses	**100**
200 to 999 employees	83
1000+ employees	17
Total large businesses	**100**
Grand total	**1,100**

Industry – small and medium businesses	Sample #
Manufacturing	100
Building / Construction	155
Wholesale Trade	72
Retail Trade	135
Transport and Storage	66
Communication, Property and Business Services	164
Finance and Insurance	77
Health and Community Services	85
Cultural, Recreational and Personal Services	85
Retail (Accommodation, Cafes and Restaurants)	61
Grand total (not including large business)	**1,000**

**Please note: Only the data relating to the 1,000 SMBs surveyed has been weighted. The weighting methodology was adjusted in 2015. Prior to 2015 the weighting was by selected ANZSIC (industry sector) divisions within the metropolitan and non-metropolitan region of each state and territory as per the Australian Bureau of Statistics (ABS) Business Register of June 1998. Now the weighting is also by industry, location and business size but based on the most current ABS data contained in the publication 8165.0 - Counts of Australian Businesses, including Entries and Exits, June 2009 to June 2013. Some adjustments to this weighting data were also made by Sensis to exclude businesses with a turnover of under $50,000 per annum which mainly consist of non-operating or non-employing businesses.*

Section 1:

The general public and social media

Device ownership

As discovered last year, all but 1% of Australians have an Internet enabled device with the average number owned being three. Smartphones are now the most popular device, overtaking laptops which have lost some appeal.

More than 50% of people also own a tablet or desktop computer. Other devices are considerably less pervasive but some growth is apparent in Internet enabled TVs, while an iPod touch or similar device has a lower penetration. Wearable devices such as Apple watches and Fitbits are now worn by 6% of people.

Examining these results by gender, age and location reveals the following:

- Males have embraced smartphones more than females but the opposite is true regarding tablets and appears to also be the case with desktop computers and wearable devices.
- Smartphones are almost universal among the under 40 age group and considerably more common in the 40-49, than 50 plus age groups, especially those aged 65 plus where only a minority have such a device.
- Desktop computers are much more prevalent in the 40 plus age groups than under 40s. The 65 plus age group are below average owners of all devices listed other than desktop computers.
- Internet-enabled TVs have captured the 30-64 age group more than those under 30 or over 65. The same is the case for wearable devices.
- Smartphones are distinctly more popular in metropolitan areas than regional, unlike laptops. Smartphones also achieve a clearly above average penetration in both the Northern Territory and the ACT. In WA and the NT ownership incidence of both tablets and desktops is well below the average. SA residents also find tablets and devices like the iPod Touch less appealing than most.

Device ownership	Total 2015	Total 2016	Male	Female	18-29	30-39	40-49	50-64	65+
Laptop	75%	**70%**	70%	69%	73%	78%	75%	69%	55%
Smartphone	70%	**76%**	81%	71%	95%	96%	86%	63%	40%
iPad or other tablet	55%	**53%**	46%	60%	38%	57%	75%	55%	43%
Desktop	52%	**54%**	53%	56%	36%	46%	64%	65%	62%
Internet-enabled TV	25%	**29%**	28%	30%	19%	37%	39%	34%	19%
iPod Touch or similar device	22%	**17%**	17%	17%	16%	16%	27%	15%	11%
A wearable device like an Apple Watch or Fitbit	NA	**6%**	4%	7%	3%	8%	7%	7%	3%
None of the above	1%	**1%**	1%	1%	1%	0%	0%	2%	2%

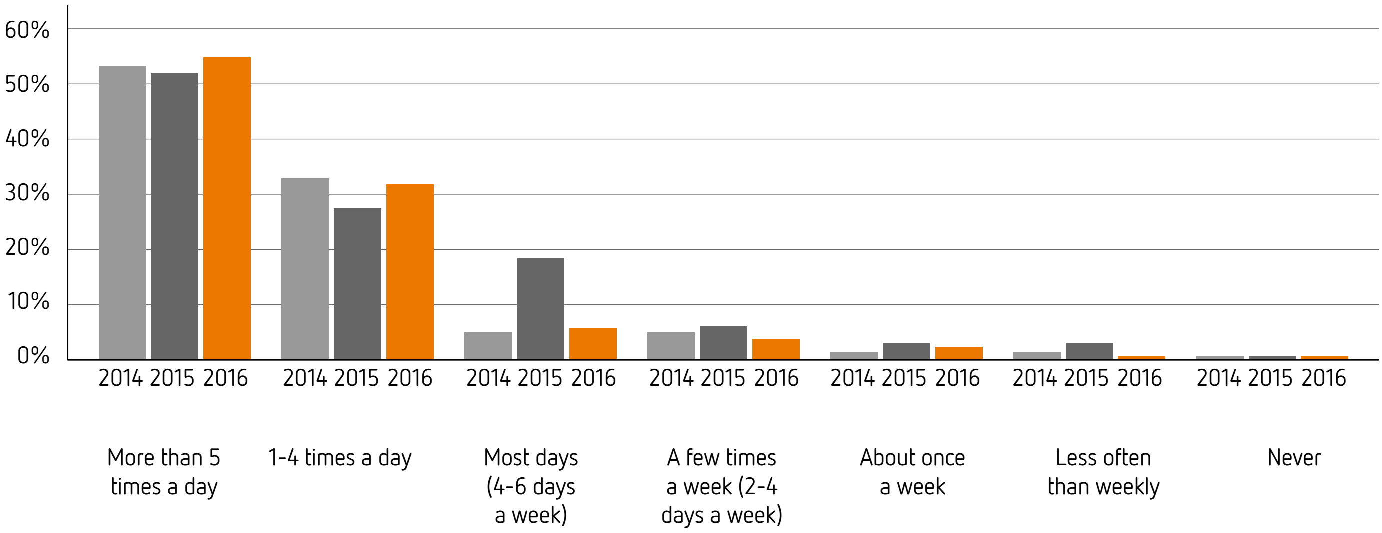
Device ownership	Total 2015	Total 2016	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Laptop	75%	**70%**	71%	68%	72%	69%	69%	66%	69%	73%	67%	75%
Smartphone	70%	**76%**	75%	71%	74%	77%	88%	80%	94%	93%	80%	68%
iPad or other tablet	55%	**53%**	58%	56%	50%	46%	45%	52%	36%	50%	54%	50%
Desktop	52%	**54%**	58%	54%	59%	52%	41%	41%	32%	50%	55%	53%
Internet-enabled TV	25%	**29%**	35%	25%	25%	31%	29%	31%	24%	27%	30%	29%
iPod Touch or similar	22%	**17%**	16%	17%	18%	12%	19%	20%	15%	18%	16%	19%
Wearable device like an Apple Watch or Fitbit	NA	**6%**	7%	4%	8%	3%	5%	3%	6%	2%	5%	7%
None of the above	1%	**1%**	1%	1%	0%	4%	0%	0%	0%	0%	<1%	2%

Base: All contacts (800)
Q1a. Which of the following do you own?
Note: <1% = less than 1%
NA = not asked in 2015

Internet access

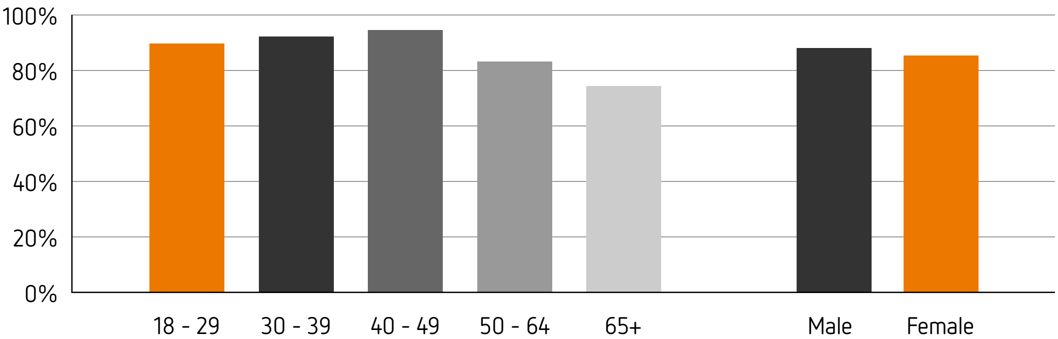
Internet usage remains almost universal with less than 1% saying they never access the Internet. Consistent with recent survey results, more than half access the Internet at least five times a day and over eight in 10 go online daily or more.

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?
Note: Rounding occurs; <1% = less than 1%

Proportion that access the Internet daily



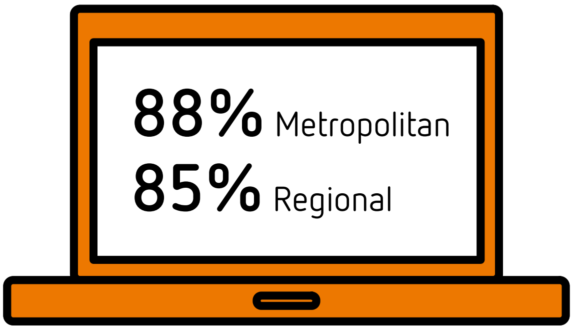
87%
of Australians access the Internet daily

Internet access

Daily Internet usage varies from 73% in Tasmania to 93% in the NT. Only a slight difference exists between metropolitan and non-metropolitan residents.

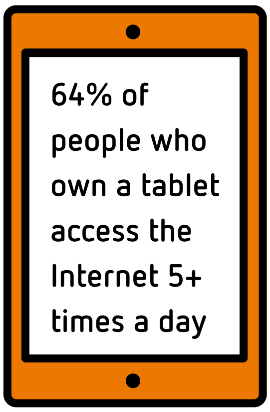
Proportion that access the Internet daily

87%	Total
93%	Northern Territory
92%	Australian Capital Territory
91%	Western Australia
88%	Queensland
87%	New South Wales
87%	Victoria
78%	South Australia
73%	Tasmania



Those who own a desktop tend to access the Internet less frequently than average. Ownership of all other Internet-enabled devices is associated with more frequent Internet use, especially an iPod Touch or similar devices, Internet-enabled TVs and wearable devices.

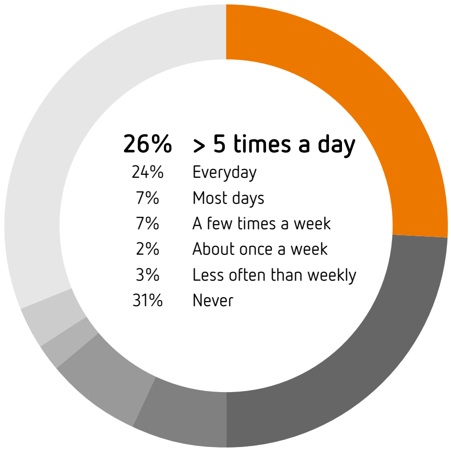
Proportion that access the internet 5+ times a day	
Total	**56%**
Own a desktop	57%
Own a laptop	62%
Own a smartphone	63%
Own a tablet (i.e. iPad)	64%
Own an iPod touch (or something similar)	71%
Own an Internet-enabled TV	71%
Own a wearable device like an Apple Watch or Fitbit	75%



Social networking site usage

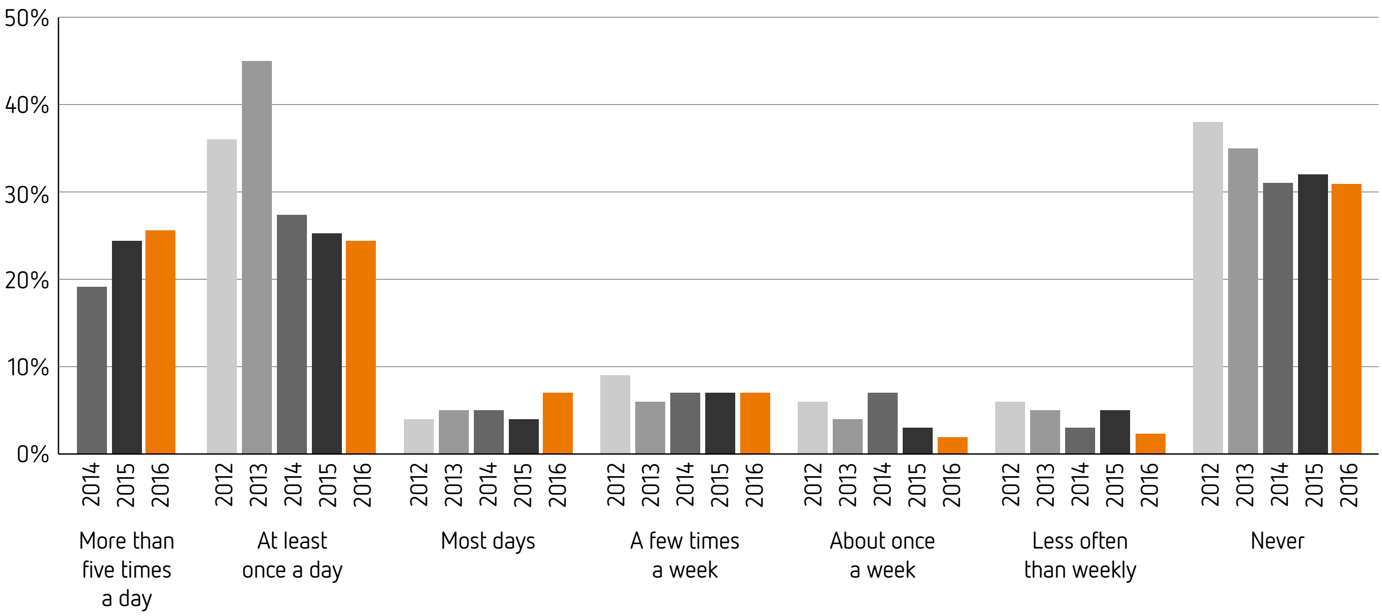
Among Internet users, 69% use social networking sites, which is similar to the last two years (68% in 2015 and 69% in 2014). However, frequency of use is increasing with 57% accessing these sites every day or most days (up from 53%) and 26% checking social media more than five times a day (24% in 2015 and 19% in 2014).

Frequency of using social networking sites



Frequency of using social networking sites	2012	2013	2014	2015	2016
More than five times a day	NA	NA	19%	24%	**26%**
At least once a day	36%	45%	27%	25%	**24%**
Most days	4%	5%	5%	4%	**7%**
A few times a week	9%	6%	7%	7%	**7%**
About once a week	6%	4%	7%	3%	**2%**
Less often than weekly	6%	5%	3%	5%	**3%**
Never	38%	35%	31%	32%	**31%**

Frequency of using social networking sites – trends



Base: All Internet users (798)
Q2a. How often, if at all, do you use social networking sites such as Facebook, Twitter, Instagram or LinkedIn?
Note: Rounding occurs

Social networking site usage by age, gender and location

The appeal of social networking sites is strongest among females and under 40s, which was also the case in the last survey. These segments use social media more than others and more frequently, especially in comparison to the over 50s, with the 65 plus age group standing out as low users.

By location we observe above average usage in SA, Tasmania and the territories, with frequency of use being highest in the NT. No real differences emerge between metropolitan and regional usage.

50% 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	**50%**	47%	54%	75%	66%	52%	38%	20%
Most days	**7%**	8%	6%	12%	7%	3%	8%	4%
A few times a week	**7%**	8%	6%	2%	4%	9%	10%	11%
About once a week	**2%**	2%	2%	0%	4%	2%	1%	2%
Less often than weekly	**3%**	3%	3%	1%	1%	4%	6%	3%
Never	**31%**	32%	29%	10%	18%	30%	37%	60%

Frequency of using social networking sites	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
At least once a day	**50%**	47%	49%	53%	54%	54%	51%	64%	55%	50%	50%
Most days	**7%**	7%	6%	8%	12%	6%	11%	6%	3%	8%	6%
A few times a week	**7%**	10%	8%	4%	5%	6%	1%	0%	9%	7%	8%
About once a week	**2%**	3%	2%	0%	0%	0%	2%	0%	0%	1%	2%
Less often than weekly	**3%**	2%	3%	4%	5%	2%	7%	2%	5%	3%	2%
Never	**31%**	31%	32%	31%	24%	32%	28%	28%	28%	31%	31%

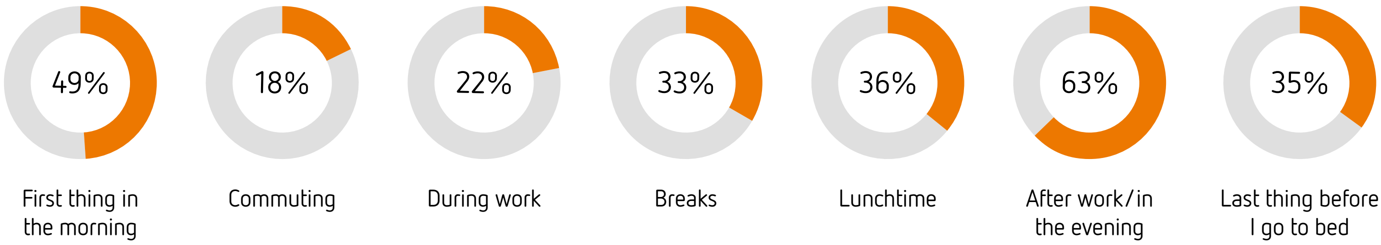
Base: All Internet users (798)
Q2a. How often, if at all, do you use social networking sites such as Facebook, Twitter, Instagram or LinkedIn?
Note: Rounding occurs. 0 = under 1%

Social media usage by time of day

Social networking sites continue to attract good usage at various times of the day with the most popular being in the evening followed by first thing in the morning. Usage in the evening, during breaks and at lunchtime is more common this year, with a decline in use during work and last thing before bed.

For both males and females the evening is clearly the most popular time to use social media and this is also true across age groups. The biggest gender differences are in usage during work, at lunchtime and in breaks, with males favouring those times.

Younger Australians aged 18-29 use social media more than all other age groups at all times other than in the evening, where the leader is the 40-49 group. The 18-29 group also really stand out in use at work, during breaks and lunchtime. Some locational differences are noted but evening use is the most favoured time everywhere.



When we socially network	2012	2013	2014	2015	2016
First thing in the morning	33%	37%	43%	45%	**49%**
Commuting	16%	16%	17%	20%	**18%**
During work	NA	12%	21%	32%	**22%**
Breaks	25%	22%	31%	27%	**33%**
Lunchtime	25%	22%	30%	23%	**36%**
After work/in the evening	63%	53%	58%	40%	**63%**
Last thing before I go to bed	40%	42%	48%	41%	**35%**

When we socially network	Male	Female	18-29	30-39	40-49	50-64	65+
First thing in the morning	51%	47%	56%	43%	49%	45%	50%
Commuting	21%	16%	25%	23%	12%	14%	11%
During work	28%	16%	30%	21%	20%	21%	6%
Breaks	42%	24%	53%	36%	25%	20%	13%
Lunchtime	47%	26%	52%	40%	27%	26%	20%
After work/in the evening	65%	62%	64%	61%	69%	62%	61%
Last thing before I go to bed	40%	30%	45%	42%	33%	20%	29%

When we socially network	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
First thing in the morning	44%	48%	50%	58%	49%	65%	66%	57%	48%	51%
Commuting	18%	19%	18%	10%	29%	15%	25%	6%	18%	18%
During work	23%	19%	20%	18%	27%	30%	35%	27%	24%	18%
Breaks	24%	30%	36%	37%	51%	37%	62%	49%	36%	27%
Lunchtime	27%	29%	40%	46%	59%	44%	66%	49%	38%	32%
After work/in the evening	62%	59%	62%	70%	71%	72%	76%	75%	62%	66%
Last thing before I go to bed	27%	41%	31%	47%	41%	49%	66%	37%	39%	28%

Base: Users of social media (544)
Q2b. When do you most commonly look at your social networking sites?
Notes: Multiple responses allowed. Rounding occurs

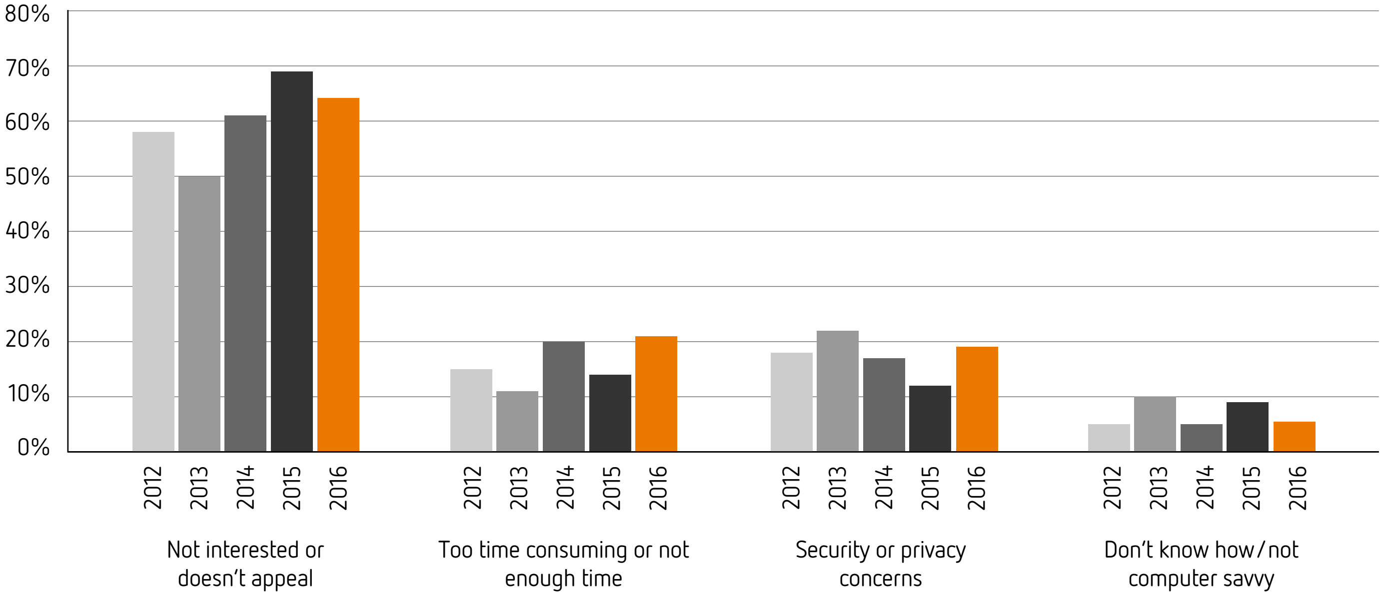
Reasons for not using social media

A lack of interest or appeal is again revealed as the biggest barrier to social media use. Relative to last year, the amount of time it consumes as well as security and privacy concerns are more prevalent, but still far behind lack of appeal. Other barriers stated have not become pronounced in their own right but demonstrate that a number of different factors cause reluctance to use social media.

Reasons for not using social networking sites

64%	**Not interested or doesn't appeal**
21%	Too time consuming or not enough time
19%	Security or privacy concerns
7%	Prefer face to face social interaction
5%	Don't agree with or believe in them
5%	Don't know how or not computer savvy
4%	Prefer phone to talk to friends
3%	Don't like to tell people about myself
2%	Prefer email to communicate

Reasons for not using social networking sites



Base: Non users of social media (254)
Q3a. Why don't you use social networking sites?
Note: 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.

"I want to stay away from it in case I get too attached."

"I'm scared of people getting too much information about me."

"They download a lot which costs too much as I am on satellite."

"I don't have the need to use social networks".

"I can do other more active things than sitting on my computer."

"It's addictive."

"I don't need to share information with the world, would prefer to call people."

"I'm concerned about privacy."

"I don't understand social networking sites."

"I do not like them. I prefer email and other means."

Social networking sites used

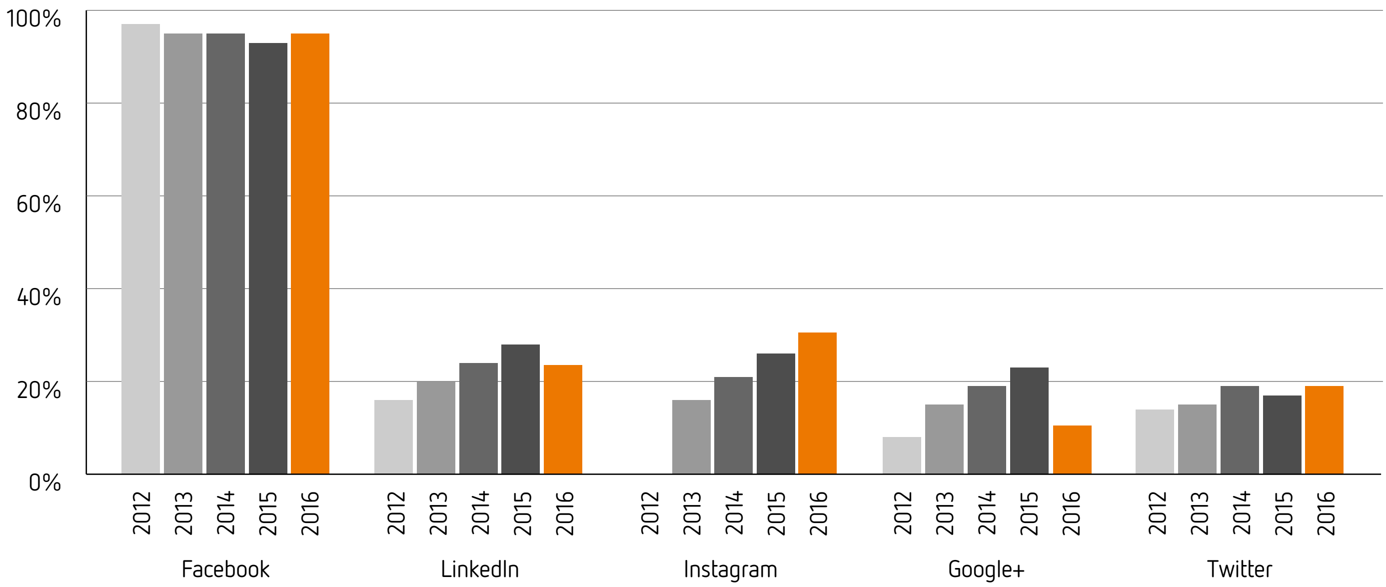
Facebook dominates in terms of usage with 95% of social networkers maintaining a Facebook profile (93% last survey). It is used by more than 90% of males and females, in each age group and across all locations. In some locations it is used by 100% of people. Among the other platforms, Instagram is on a growth path, while LinkedIn was less popular than in 2015. LinkedIn usage remains higher among males, those working full-time and higher income earners, as well as those in the 30-64 age bracket.

Google+ mentions were also lower but this is potentially due to a change in the description for clarification purposes to avoid confusion with Google search. Twitter users appear to have increased marginally relative to 2015. Snapchat has become more appealing in the last 12 months, with usage rising from 15% to 22%. Visual platforms such as Instagram and Snapchat appeal mostly in the younger age groups, particularly under 30s. Males use Twitter and Snapchat more, while Pinterest is more popular among females.

Social networking sites used

95%	Facebook
31%	Instagram
24%	LinkedIn
22%	Snapchat
19%	Twitter
11%	Pinterest
10%	Google+
5%	Tumblr
3%	Vine
1%	Yelp
1%	Foursquare

Social networking sites used



Social networking sites used

Facebook continues to dominate as the most used site

Social networking sites used	Male	Female	18-29	30-39	40-49	50-64	65+
Facebook	94%	97%	99%	94%	95%	91%	95%
LinkedIn	26%	21%	12%	30%	34%	30%	12%
Instagram	32%	30%	58%	36%	21%	11%	6%
Google+	10%	11%	9%	10%	15%	9%	11%
Twitter	25%	14%	33%	20%	11%	14%	4%
Pinterest	4%	18%	10%	16%	19%	5%	4%
Snapchat	27%	18%	60%	14%	10%	2%	2%
Tumblr	5%	5%	11%	4%	6%	0%	0%

Social networking sites used	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Facebook	92%	96%	100%	93%	99%	97%	100%	95%	95%	97%
LinkedIn	32%	22%	23%	12%	19%	5%	12%	25%	27%	18%
Instagram	26%	31%	24%	42%	43%	40%	61%	53%	36%	20%
Google+	12%	8%	9%	10%	15%	13%	6%	13%	11%	10%
Twitter	22%	14%	9%	36%	23%	26%	35%	35%	24%	8%
Pinterest	10%	16%	13%	8%	4%	1%	10%	12%	12%	10%
Snapchat	19%	14%	15%	41%	45%	38%	52%	31%	26%	15%
Tumblr	3%	7%	4%	9%	10%	0%	5%	0%	6%	3%

Base: Users of social media (544)
Q2c. Which of these social networking sites do you use?
Notes: Multiple responses allowed. Rounding occurs. In 2016 Google + option changed to 'Google's social site Google+'

Social networking sites we've stopped using

Not many users (9%) claimed to have stopped using social media sites in the past year, which is less than observed in 2015 (14%). Twitter continues to be the most common platform people have stopped using followed by Facebook, Instagram and LinkedIn.

Social networking sites we've stopped using

Which sites Australians dropped in the past year	2014	2015	2016
Twitter	45%	39%	**34%**
Facebook	19%	18%	**15%**
Instagram	4%	12%	**13%**
LinkedIn	4%	13%	**11%**
Snapchat	7%	17%	**9%**
Pinterest	0%	6%	**6%**
Google+	3%	9%	**4%**
Vine	0%	2%	**2%**
Tumblr	0%	9%	**<1%**
Myspace	13%	0%	**<1%**
Foursquare	0%	4%	**0%**
Yelp	0%	2%	**0%**

Base: Stopped using a social media channel in the past year (53)
Q2d. Over the past year, have you stopped using any social networking channels?
Q2e. Which ones?
Note: In 2016 Google + option changed to 'Google's social site Google+'

Twitter continues to have the highest drop off rate

Frequency of using social networking sites

Frequency of Facebook usage has continued to increase albeit more slowly in the last two years – from around 30 visits per week to almost 32 now. Last year females were more frequent users than males but the opposite is now occurring. However, frequency remains inversely correlated with age. The under 30s check in over 40 times per week on average and this reduces down the scale to the 65 plus age group who check in less than 11 times per week. By state, frequency of use is well above average in WA and the two territories. It is also relatively high in SA and Tasmania.

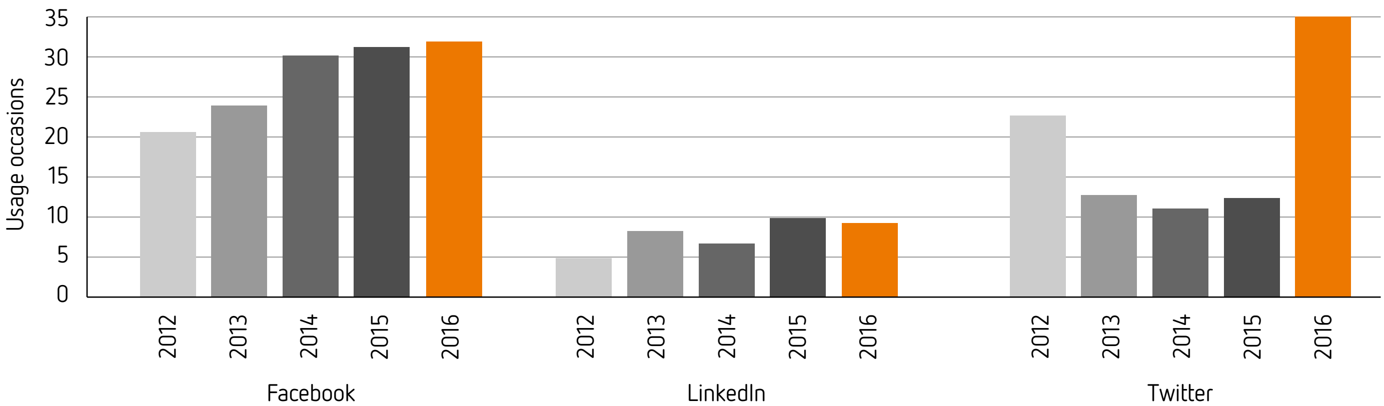
Twitter use frequency had declined in recent surveys but this year average usage has almost tripled. LinkedIn use has not changed greatly in recent years with frequency of use similar to last year.

Instagram is being used more often, up from 23 times a week on average in 2014 to 26 last year and 29 in 2016.

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	95%	2%	9%	13%	25%	12%	37%	31.9
LinkedIn	24%	10%	47%	18%	10%	2%	9%	9.5
Instagram	31%	4%	16%	10%	25%	9%	33%	29.4
Twitter	19%	4%	19%	12%	13%	9%	39%	35.0
Pinterest	11%	9%	41%	19%	9%	7%	10%	9.6

Average usage occasions per week



Base: Users of social media (544) Q6a
In a typical week, how many times would you use Facebook / LinkedIn / Instagram / Twitter / Pinterest?
Note: Can't say responses not shown. Rounding occurs

Average usage occasions per week – Facebook	
Total	**31.9**
Male	37.3
Female	27.1
18 to 29	44.8
30 to 39	36.3
40 to 49	28.4
50 to 64	21.5
65+	10.7

Average usage occasions per week – Facebook	
Total	**31.9**
New South Wales	25.2
Victoria	24.2
Queensland	28.7
South Australia	43.2
Western Australia	57.7
Tasmania	38.2
Northern Territory	60.5
Australian Capital Territory	51.0
Metropolitan	**33.9**
Regional	**28.0**

Base: Users of social media (544) Q6a
In a typical week, how many times would you use Facebook / LinkedIn / Instagram / Twitter / Pinterest?
Note: Can't say responses not shown. Rounding occurs

Time spent on social networking sites

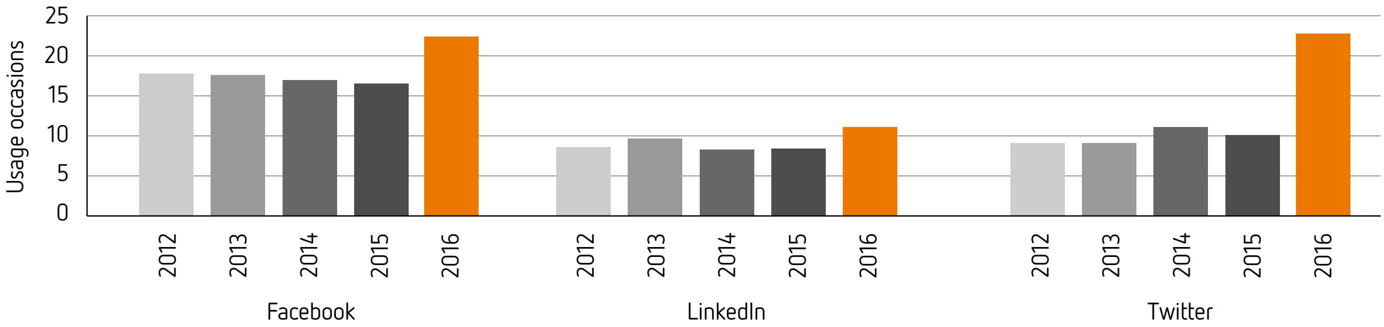
The average time spent on Facebook had been around 17-18 minutes per visit in the previous four surveys but this has now increased to almost 24 minutes. Users are also spending more time on the other sites – with the averages relative to 2015 rising from 8.5 to around 10 minutes for LinkedIn, from nine to 24 minutes for Instagram, from 10 to almost 24 minutes for Twitter and from just under 18 to over 20 minutes for Pinterest.

Multiplying the average time spent by the average number of usage occasions shows that the typical Facebook user spends more than twelve and a half hours per week on the platform, which compares with around eight and a half hours in the last two surveys.

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	95%	5%	25%	14%	13%	15%	26%	23.7
LinkedIn	24%	28%	27%	21%	4%	9%	8%	10.1
Instagram	31%	11%	20%	17%	8%	9%	31%	24.1
Twitter	19%	23%	13%	16%	7%	7%	32%	23.8
Pinterest	11%	20%	15%	8%	12%	17%	25%	20.3

Average time spent on each usage occasion (minutes)

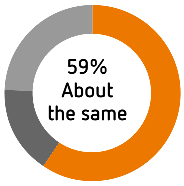


Base: Users of social media (544)
Q6b. And roughly how long would you spend each time you use Facebook / LinkedIn / Instagram / Twitter / Pinterest?
Notes: Can't say responses not shown. Rounding occurs

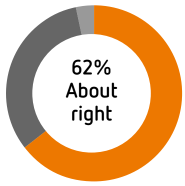
Users' views on time spent on social networking

The majority of users feel they spend about the same amount of time on social networking as previous years, but 24% said their use had increased in the last year, while 16% said it had decreased. Over six in ten are comfortable with the time they spend social networking, but almost one third feel it is excessive. Most expect to spend the same amount of time on social media in the coming year. These results are in line with prior findings.

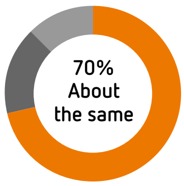
Change in time spent social networking over the past year	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Increased	**24%**	20%	28%	22%	27%	26%	25%	23%
Decreased	**16%**	12%	20%	17%	19%	15%	17%	7%
About the same	**59%**	67%	51%	60%	53%	58%	58%	68%



Perception of time spent social networking	Total	Male	Female	18-29	30-39	40-49	50-64	65+
About right	**62%**	69%	56%	60%	63%	58%	64%	70%
Too much	**31%**	26%	35%	37%	31%	34%	27%	18%
Not enough	**3%**	2%	3%	1%	2%	3%	5%	5%



Expectations for time spent social networking	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Increasing	**12%**	14%	11%	19%	8%	12%	10%	9%
Decreasing	**16%**	17%	15%	16%	26%	13%	11%	11%
About the same	**70%**	66%	73%	63%	65%	71%	76%	79%



Base: Users of social media (544)
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?
Note: The 18-29 results prior to 2015 were for 20-29s. Don't know responses not shown

Favourite social media platform and why

Almost four in ten social media users claim not to have a favourite site but half nominate Facebook. No other site is called the favourite by more than 4% of people. Eighteen percent use no other social media site but Facebook. Among the rest, many reasons make Facebook the favourite although use by family and friends is the main attraction. LinkedIn and Google+ appeal for networking and business opportunities, while Instagram fans value its visual content, user friendliness, privacy and security features.

By gender we find females more likely to nominate Facebook as their favourite platform (54% to 46%). In terms of being the favourite, Facebook is nominated by a clear majority of the over 40 age groups (around 60%) but a minority of the under 40s (between 39% and 45%). Under 40s show above average liking for visual platforms such as Instagram, Snapchat, Tumblr and Pinterest. LinkedIn is favoured almost exclusively by males in the 40-64 age group.

50%	Facebook
4%	Instagram
2%	LinkedIn
1%	Twitter
1%	Snapchat
1%	Tumblr
<1%	Pinterest
<1%	Google+
38%	No favourite

Base: Users of social media (544)
Q6f. Do you have a favourite social media platform, and if so which is it?
Note: New question in 2016 so no comparison available
Other responses not shown

Main reasons it is my favourite	Facebook	Twitter	LinkedIn	Instagram
Friends use it	40%	7%	0%	0%
Family use it	31%	0%	0%	0%
Only one I use	18%	0%	0%	0%
Most popular	11%	0%	4%	0%
Familiarity	11%	20%	0%	0%
Networking	8%	0%	0%	0%
Employment/professional networking	2%	0%	86%	0%
Social media content	<1%	7%	0%	0%
Written content	2%	21%	0%	0%
Graphic/visual content	2%	0%	0%	44%
Video content	4%	0%	0%	12%
Media content including news	2%	33%	0%	0%
Topics of interest	6%	11%	0%	0%
Forums/issues discussion	4%	8%	0%	0%
Business/sales/marketing	3%	0%	14%	0%
Global reach	6%	14%	0%	0%
People of interest	<1%	7%	0%	<1%
User friendly/easy to use	16%	27%	0%	42%
Privacy features	<1%	0%	0%	16%
Security features	0%	0%	0%	14%
Base	*263*	*10*	*11*	*18*

Base: Users of social media who have a favourite platform (544)
Q6g. Why is ... your favourite social media platform?
Note: New question in 2016 so no comparison available. Small bases for platforms other than Facebook.

Number of friends, contacts or followers

We cannot make a direct comparison because of a change in the questioning but the average number of social media friends and followers of 409 for the five platforms of interest (Facebook, LinkedIn, Twitter, Instagram and Google+) is higher than ever recorded for all platforms used.

Interestingly, males reported having more contacts than females again this year. Again we noticed a big difference across age groups, which is not surprising given the variation in use. Older users (aged 65 plus) 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 NT residents reporting the highest number of friends and the lowest being indicated in Queensland. Metropolitan residents reported more contacts than their regional counterparts.

The average person has 272 Facebook friends

Number of friends, contacts or followers	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Facebook	**272**	307	240	499	261	195	129	44
LinkedIn	**131**	148	108	50	160	161	150	16
Twitter	**257**	327	140	377	210	44	82	4
Instagram	**234**	298	176	334	175	28	64	18
Google+	**43**	47	39	10	132	48	13	9
Overall average (above sites)	**409**	495	326	817	395	246	178	45

Number of friends, contacts or followers across all platforms	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 2016* (for 5 sites only)	**409**	495	326	817	395	246	178	45

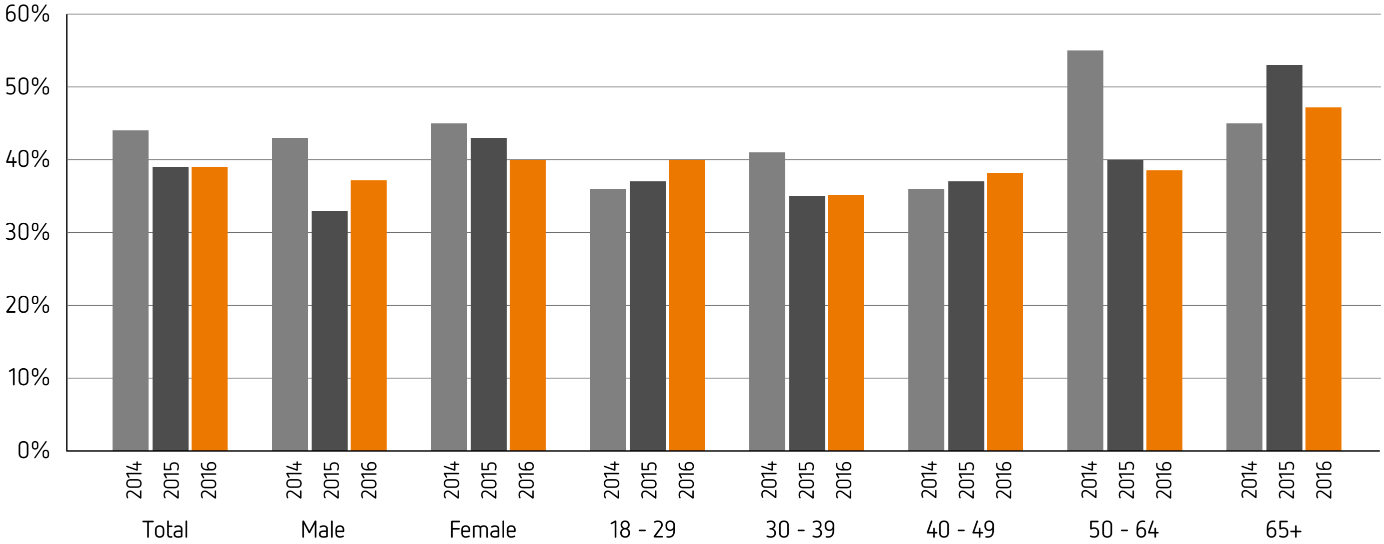
	Overall average	Facebook	LinkedIn	Twitter	Instagram	Google+
Total	**409**	272	131	257	234	43
New South Wales	**355**	223	152	270	194	55
Victoria	**414**	327	97	68	252	6
Queensland	**321**	257	77	168	141	3
South Australia	**543**	290	214	392	264	32
Western Australia	**549**	290	189	367	322	93
Tasmania	**569**	339	456	406	263	45
Northern Territory	**751**	331	35	494	386	149
Australian Capital Territory	**444**	251	134	183	199	35
Metropolitan	**477**	303	130	275	242	52
Regional	**271**	210	134	146	204	18

Base: Users of social media (544)
Q5a. How many different friends, contacts or followers do you have on each of these social networking sites?
Notes:
- *Rounding occurs*
- *The 18-29 results prior to 2015 were actually for 20-29s*
- **Question 5a changed relative to last year asking specifically about the five social networking sites shown above instead of all sites that were used hence these results are not really comparable with the prior years' results*
- *For each of the sites there were two very large outliers which have been excluded from the mean calculations above*

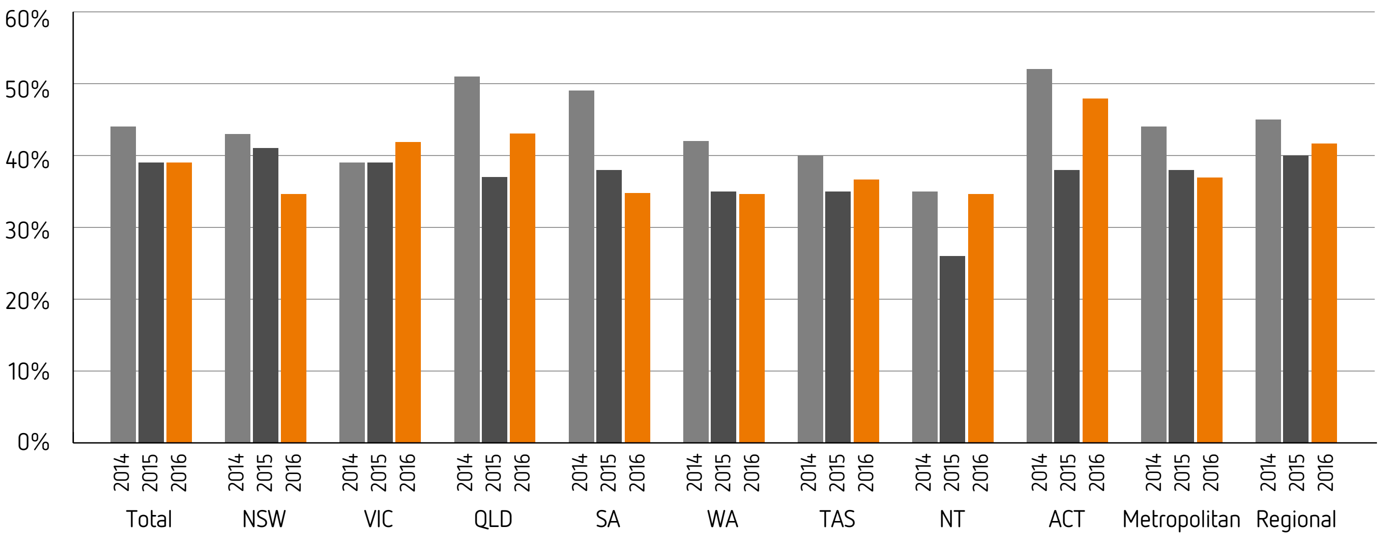
Number of friends, contacts or followers

The average proportion seeing their social media contacts face to face has not changed in the past year (39%) but is lower than in 2014 (44%). Females remain more likely to have seen their contacts in person than males. This also applies to the 65 plus age group relative to others and to regional residents compared to those in metropolitan areas. ACT residents were the most 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 (544)
Q5b. What percentage of your social networking contacts would you have seen in person over the past twelve months?
Note: The 18-29 results prior to 2015 were actually for 20-29s

Number of Twitter accounts followed

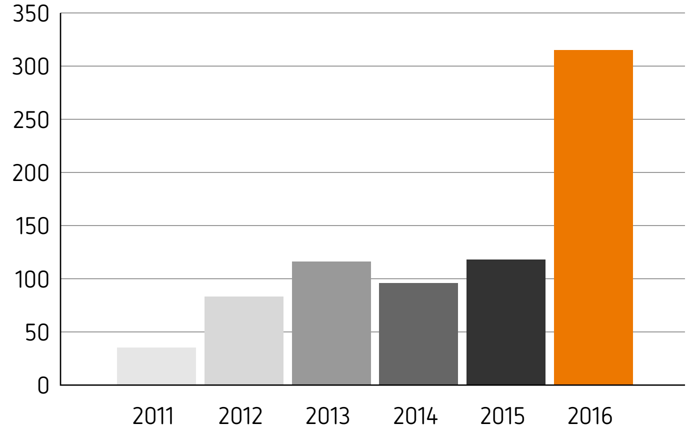
Twitter users appear to be following a lot more accounts now with the average number increasing by nearly 200 to 315. Frequency of use has risen substantially too, with 47% tweeting most days compared to 22% last year and 16% in 2014. The proportion who never tweet has also fallen markedly to 8%, down from 31% in 2014 and 16% last year.

Number of Twitter accounts followed

315	**Average**
10%	Up to 5
5%	6 to 10
9%	11 to 20
16%	21 to 50
57%	Over 50
3%	Don't know

Base: Users of Twitter (112)
Q5d. Approximately how many Twitter accounts do you follow?
Note: There were two very large outliers provided by three respondents which have been excluded from the mean calculation above

Number of Twitter accounts followed



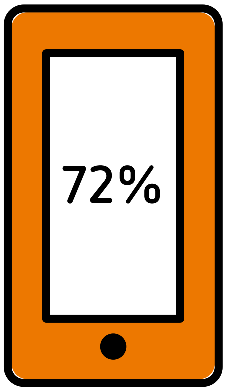
How often do you tweet on average?	2014	2015	2016
More than five times a day	5%	10%	**26%**
Every day / most days	11%	12%	**21%**
A few times a week	17%	20%	**11%**
About once a week	3%	8%	**8%**
Less than once a week	33%	33%	**26%**
Do not tweet at all	31%	16%	**8%**

Base: Users of Twitter (112)
Q5dii. How often do you tweet on average?
Note: Q5dii not asked prior to 2014 so no comparison available

Devices and applications used to access social media

Smartphones are clearly the preferred device for social networking. Over seven in ten social media users access their accounts on their smartphone, which is consistent with the results from last year. Use of laptops for social media continues to decline from 69% in 2012 to 52% last year and 39% in 2016. Tablet usage is also trending down from 39% in 2014 to 34% last survey to 30% now. Desktops are half as popular for logging into social media as they were in 2011 (60% down to 30%).

Seventy-four percent are accessing social media on their mobile device only via apps (same level as in 2015) rather than only via a website (14%, no change). Twelve percent use both these options. In light of these results it is not surprising to discover a strong preference for app access over website access – 71% versus 29%.



72% of people use smartphones to access social media

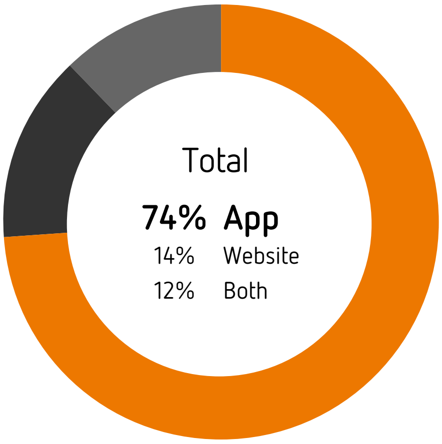
Devices used to access social media	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Smartphone	**72%**	81%	63%	96%	93%	68%	52%	13%
Laptop computer	**39%**	39%	39%	36%	35%	43%	39%	45%
Tablet	**30%**	25%	35%	15%	25%	44%	41%	36%
Desktop computer	**30%**	29%	32%	15%	24%	30%	48%	49%
iPod Touch	**1%**	1%	1%	1%	0%	0%	4%	0%
Internet-enabled TV	**1%**	<1%	2%	0%	1%	3%	3%	0%

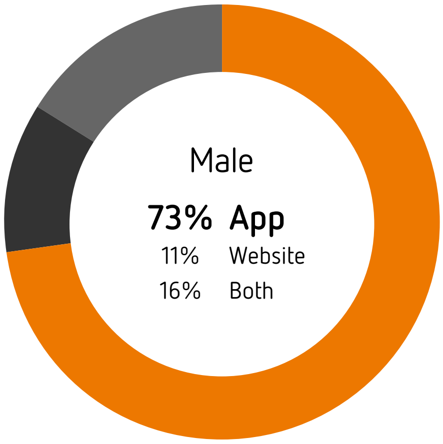
Devices used to access social media	2011	2012	2013	2014	2015	2016
Smartphone	**34%**	53%	67%	71%	70%	**72%**
Laptop computer	**50%**	69%	64%	55%	52%	**39%**
Tablet	**4%**	18%	35%	39%	34%	**30%**
Desktop computer	**60%**	54%	46%	38%	28%	**30%**
iPod Touch	**5%**	6%	5%	6%	3%	**1%**
Internet-enabled TV	**NA**	NA	NA	NA	2%	**1%**

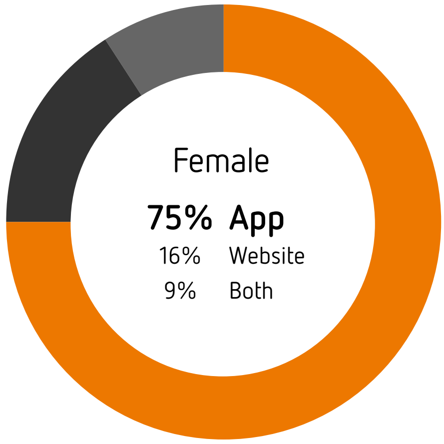
Base: Users of social media (544)
Q7a(i). What devices do you use to access social network sites?

Devices and applications used to access social media

How mobile users access social media



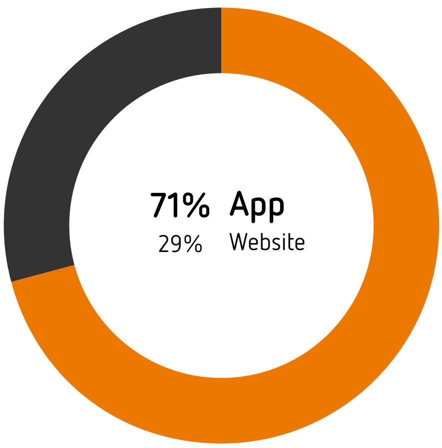




How mobile users access social media	18-29	30-39	40-49	50-64	65+
App	78%	75%	76%	69%	54%
Website	5%	11%	15%	23%	43%
Both	17%	14%	9%	8%	3%

Base: Users of social media on mobile devices (448)
Q7a(ii). What devices do you use to access social network sites?
Note: The 18-29 results prior to 2015 were actually for 20-29s

Which platform do you prefer



Base: Users of social media on mobile devices with access via apps and the website (58)
Q7b. What devices do you use to access social network sites?

Where are social networking sites used?

Once more we find that nearly everyone social networks at home and the appeal of other locations has not changed much in the past year either. Work, public transport, restaurants, bars, parties and in the car were mentioned by significant proportions. Interestingly, males nominated all the venues outside the home more than females.

This year we have seen the gym emerge as another place where people access social media.

Locations where social media is used

96%	**At home**
35%	At work
25%	On public transport
20%	In the car
19%	Restaurants/bars/parties
14%	At sporting events
14%	At school or college
8%	At the gym

Locations where social media is used	2011	2012	2013	2014	2015	2016
At home	97%	98%	96%	95%	93%	**96%**
At work	22%	30%	34%	39%	32%	**35%**
On public transport	10%	29%	32%	31%	26%	**25%**
Restaurants/bars/parties	11%	22%	26%	30%	21%	**19%**
In the car	10%	16%	18%	26%	19%	**20%**
At sporting events	8%	17%	19%	21%	16%	**14%**
At school or college	10%	12%	13%	12%	15%	**14%**
At the gym	NA	NA	NA	NA	NA	**8%**

Locations where social media is used	Total	Male	Female	18-29	30-39	40-49	50-64	65+
At home	**96%**	94%	97%	95%	94%	97%	94%	100%
At work	**35%**	44%	26%	49%	45%	34%	23%	1%
On public transport	**25%**	30%	20%	50%	27%	14%	8%	3%
Restaurants/bars/parties	**19%**	22%	16%	33%	23%	14%	9%	3%
In the car	**20%**	26%	14%	37%	22%	11%	12%	3%
At sporting events	**14%**	19%	9%	25%	16%	10%	5%	2%
At school or college	**14%**	18%	9%	29%	13%	7%	5%	1%
At the gym	**8%**	12%	5%	15%	11%	6%	3%	0%

Locations where social media is used	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
At home	**96%**	97%	96%	93%	97%	93%	94%	95%	97%	96%	95%
At work	**35%**	36%	28%	41%	38%	33%	38%	37%	34%	37%	31%
On public transport	**25%**	19%	24%	15%	43%	39%	51%	54%	27%	29%	15%
Restaurants/bars/parties	**19%**	15%	14%	13%	33%	33%	40%	53%	32%	23%	11%
In the car	**20%**	15%	13%	15%	41%	36%	51%	52%	32%	24%	13%
At sporting events	**14%**	10%	13%	9%	22%	22%	35%	47%	22%	17%	7%
At school or college	**14%**	9%	10%	11%	25%	25%	37%	28%	12%	15%	10%
At the gym	**8%**	6%	6%	6%	5%	20%	13%	38%	16%	10%	5%

Base: All social media users (544)
Q7c. Where do you use social networking sites – either on your computer or mobile device?
Notes: Multiple responses allowed. The 18-29 results prior to 2015 were actually for 20-29s

Where are social networking sites used?

Within the home, the living room remains much more popular than any other room for using social media. The bedroom also retains majority appeal in the under 40 age group. Fewer people appear to be using social media in other rooms than last survey, but apart from the study such rooms tend to be favoured more by males than females, and by those aged under 40. Some locational variations are also evident but the living room is the most popular in all states and territories.

Social media use in the home

69%	**Lounge/living room**
42%	Bedroom
29%	Study
22%	Kitchen
12%	Toilet
9%	Bathroom

Where in the home social media is used	2011	2012	2013	2014	2015	2016
Lounge/living room	48%	58%	66%	70%	72%	**69%**
Bedroom	31%	41%	44%	49%	43%	**42%**
Study	47%	43%	36%	37%	35%	**29%**
Kitchen	11%	16%	21%	22%	24%	**22%**
Toilet	NA	5%	6%	10%	14%	**12%**
Bathroom	4%	5%	7%	10%	14%	**9%**

Where in the home social media is used	Total	Male	Female	18-29	30-39	40-49	50-64	65+
Lounge/living room	**69%**	70%	69%	74%	80%	82%	50%	50%
Bedroom	**42%**	49%	36%	67%	55%	32%	18%	19%
Study	**29%**	27%	30%	18%	28%	24%	47%	32%
Kitchen	**22%**	25%	19%	29%	27%	20%	16%	11%
Toilet	**12%**	16%	8%	19%	16%	9%	6%	0%
Bathroom	**9%**	10%	8%	13%	13%	8%	5%	0%

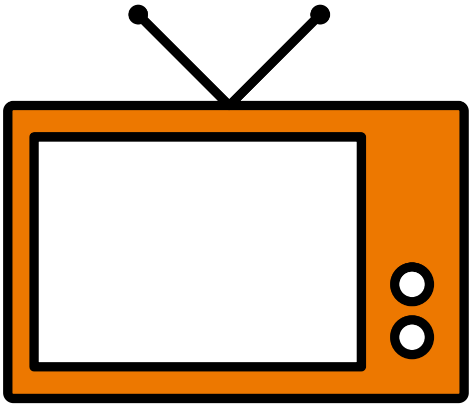
Where in the home social media is used	Total	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Lounge/living room	**69%**	67%	64%	71%	76%	71%	96%	96%	76%	72%	65%
Bedroom	**42%**	33%	42%	36%	58%	61%	62%	73%	57%	48%	32%
Study	**29%**	33%	23%	32%	25%	26%	22%	24%	33%	27%	32%
Kitchen	**22%**	19%	15%	25%	28%	35%	32%	41%	29%	24%	18%
Toilet	**12%**	8%	5%	12%	17%	26%	16%	41%	25%	13%	8%
Bathroom	**9%**	8%	3%	14%	14%	8%	22%	7%	20%	11%	5%

Base: Users of social media sites at home (520)
Q7d. Where would you normally use these sites at home? In which rooms of the house?
Notes: Multiple responses allowed. The 18-29 results prior to 2015 were actually for 20-29s

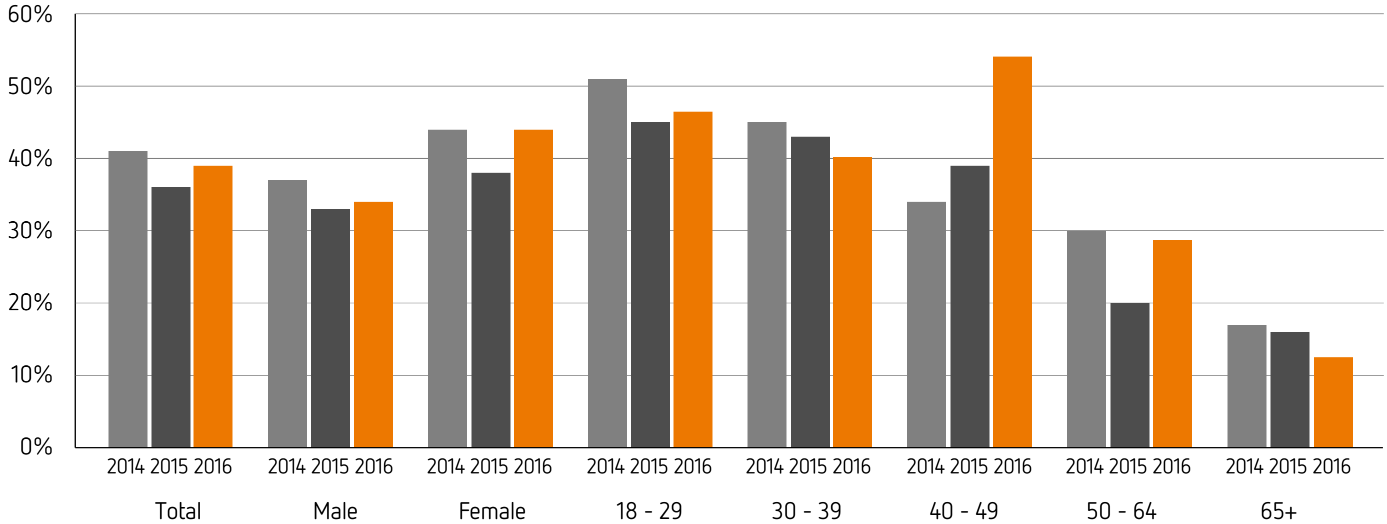
TV and social networking

Once again we find that about four in ten users check-in to social networks while watching television. This behaviour remains more typical of females but the 40-49s have now adopted such behaviour to a greater degree than other age groups. News and current affairs, reality shows and movies are the most popular TV programs viewed while social networking. However, reality TV shows and movies were both mentioned more than last year, with fewer watching news and current affairs while social networking.

More than one in four people discuss the programs they watch on social media and this statistic has not altered much in recent years, however, males are now doing this more than females.



Proportion that use social media while watching TV

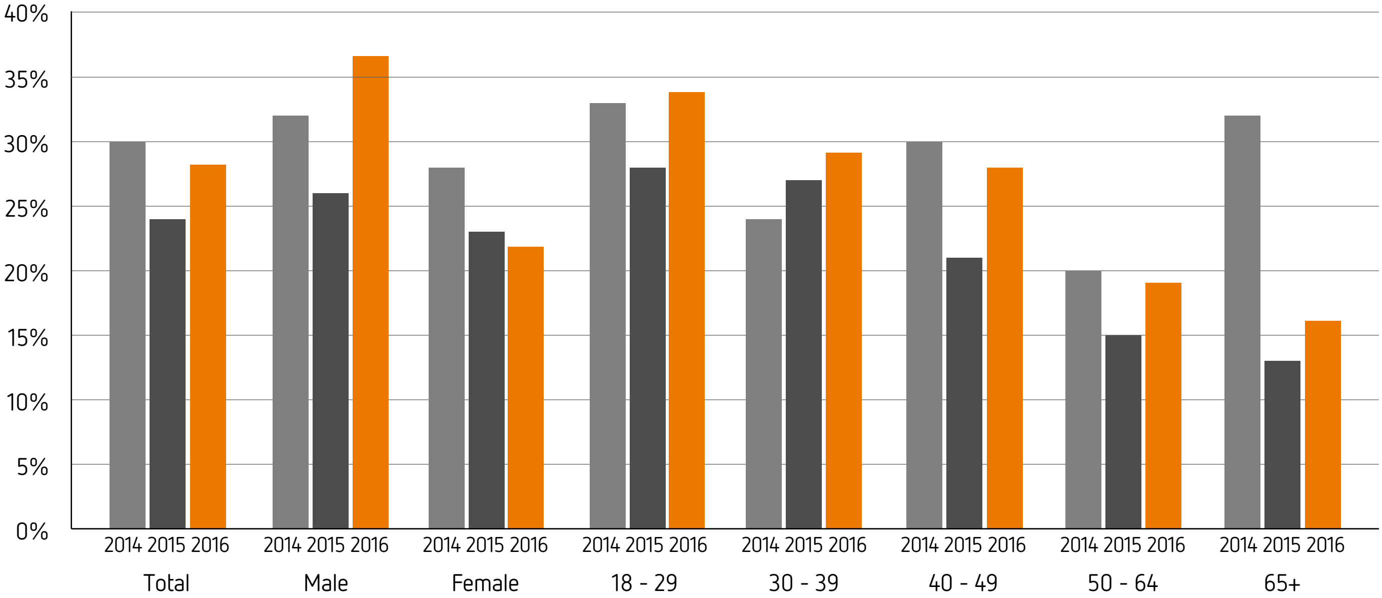


Base: All social media users (544)
Q8a. Do you use social media when you watch TV?

TV genres favoured while social networking	2012	2013	2014	2015	2016
News and current affairs	42%	37%	44%	50%	**44%**
Reality TV	31%	38%	31%	41%	**44%**
Sport	31%	35%	32%	33%	**27%**
Movies	27%	26%	25%	32%	**41%**
Documentaries	22%	21%	28%	30%	**27%**
Comedy shows	39%	33%	30%	31%	**31%**
Dramas	28%	31%	36%	26%	**30%**
Soaps	23%	19%	20%	25%	**23%**

TV and social networking

Discuss TV program on social media while watching



Impact of discussing television programs on social media on enjoyment	2014	2015	2016
Increases my enjoyment	41%	33%	**44%**
Decreases my enjoyment	9%	3%	**6%**
No impact on my enjoyment	51%	47%	**44%**
Don't know or not sure	0%	18%	**5%**

Base: Users of social media while watching TV (190)
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 62)
Notes: Multiple responses allowed for Q8b. Rounding occurs. The 18-29 results prior to 2015 were actually for 20-29s

People are discussing programs on social media while watching television

Reasons for using social networking sites

As has been the case throughout this survey series, nearly all users of social media regard it as a means of keeping in touch with friends or family. Watching videos has emerged as one of the other common reasons, mentioned by 28% of people. Many other influences remain at play, although a number are declining in appeal.

Sharing photos, videos, news or current affairs content remains attractive for over one third of users but has declined over the past two to three years. That is also true concerning certain entertainment and shopping influences. For instance, using social media to coordinate parties and shared activities, finding out about events and playing games. In terms of shopping, the common reasons for using social media are to follow brands or businesses, conduct research and provide reviews or blogs on purchases.

28% of people use social media to watch videos

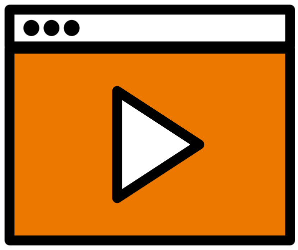
Reasons for using social networking sites	2011	2012	2013	2014	2015	2016
Catch up with family and friends	93%	94%	94%	95%	92%	**91%**
Share photographs or videos	56%	51%	47%	64%	45%	**36%**
Get information on news and current events	NA	27%	29%	47%	40%	**35%**
Coordinate parties or other shared activities	32%	33%	29%	33%	24%	**18%**
Follow or find out about particular brands or businesses	15%	22%	25%	32%	24%	**16%**
Find out about entertainment events	26%	23%	24%	32%	23%	**17%**
Play games	24%	18%	21%	26%	21%	**18%**
Research holiday destinations or travel offers	12%	13%	13%	26%	20%	**12%**
Follow particular brands to access offers or promotions	11%	18%	15%	29%	20%	**13%**
Research products and services you might want to buy	12%	16%	20%	28%	19%	**14%**
Find people with the same interests	14%	13%	14%	22%	17%	**16%**
Meet new friends	18%	14%	10%	20%	14%	**14%**
Follow celebrities	6%	9%	9%	12%	12%	**14%**
Provide reviews/write blogs about products you have bought	6%	6%	8%	15%	11%	**8%**
Pressure from family and friends to use them	NA	11%	7%	9%	9%	**5%**
Engage with a government representative or department	5%	7%	6%	9%	8%	**8%**
Find potential dates	NA	3%	5%	9%	6%	**3%**
To watch videos	NA	NA	NA	NA	NA	**28%**

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 and there are some notable differences. Females mentioned most of the shopping and research related reasons more than males, while the opposite applied for watching videos, following celebrities, meeting friends and meeting people with the same interests. Quite a few of the factors influencing social media use are more prevalent in the under 40 age groups.

43% of 18-29 years olds use social media to watch videos



Reasons for using social networking sites	Male	Female	18-29	30-39	40-49	50-64	65+
Catch up with family and friends	91%	92%	97%	93%	88%	84%	94%
Share photographs or videos	37%	36%	48%	41%	31%	23%	31%
Get information on news and current events	34%	36%	33%	47%	40%	28%	22%
Co-ordinate parties or other shared activities	16%	20%	23%	29%	18%	8%	3%
Follow or find out about particular brands or businesses	14%	18%	13%	21%	23%	13%	7%
Find out about entertainment events	14%	20%	17%	26%	18%	11%	10%
Play games	16%	19%	20%	21%	14%	17%	16%
Research holiday destinations or travel offers	10%	13%	7%	11%	14%	15%	14%
Follow particular brands to access offers and promotions	8%	18%	11%	22%	16%	8%	7%
Research products or services you might want to buy	11%	15%	7%	20%	17%	12%	14%
Find people with the same interests	19%	13%	24%	13%	17%	11%	8%
Meet new friends	17%	10%	23%	13%	17%	11%	8%
Follow celebrities	18%	11%	28%	18%	9%	2%	4%
Provide reviews and write blogs about products you have bought	8%	8%	9%	15%	9%	5%	0%
Pressure from family and friends to use them	4%	6%	8%	5%	4%	4%	3%
Engage with a Government representative or department	8%	9%	3%	10%	12%	11%	10%
Find potential dates	2%	5%	5%	5%	1%	2%	2%
To watch videos	37%	20%	43%	38%	19%	14%	14%

Base: Users of social media (544)
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: Multiple responses allowed

Types of products or services researched on social networking sites

Using social media to research products and services to buy has halved in two years from 28% in 2014 to 19% last year and 14% in this survey. Clothing and fashion is being researched to a lesser degree than previous years, although it remains one of the more commonly mentioned categories. In the list below, electrical goods is the most researched category via social media followed by furniture and items for the home.

Products or services researched on social networking sites	2011	2012	2013	2014	2015	2016
Clothing and fashion	42%	53%	44%	49%	53%	**35%**
Electrical goods	39%	31%	26%	43%	44%	**45%**
Furniture and things for the home	28%	17%	11%	29%	40%	**38%**
Music	19%	32%	19%	20%	26%	**25%**
Computers and hardware	21%	20%	21%	24%	24%	**28%**
Cosmetics, beauty and fragrances	4%	22%	20%	12%	23%	**22%**
Software	8%	14%	9%	18%	21%	**16%**
Movies/TV Shows	4%	14%	8%	17%	16%	**29%**
Games	9%	10%	15%	14%	9%	**20%**

Base: Use social networking sites to research products or services (76)
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?

Notes:
- *Multiple responses allowed*
- *NA = response option not provided*
- *Some changes to the response options were made in 2016 but trend series results still shown. 'Videos' changed to 'Movies / TV Shows'. 'Computer games' changed to 'Games'*

This year fewer people are using social media to research clothing and fashion

Path to purchase

Among the 14% who use social media platforms to research something they want to buy, holiday, travel and accommodation stood out (21%). There were also double figure mentions for clothing and fashion (12%) and appliances or electrical equipment (11%). However, as indicated in the previous section, clothing and fashion are being researched far less through social media than in the past two years. Now such research via a mobile device has clearly overtaken the computer. Purchases increased to 59% (from 49% last year) but they had been higher in 2014 at 63%. There has been a gradual increase since 2013 in the proportion who made their purchase online, from 50% to 71%.

What were you looking for on the last search occasion?	2014	2015	2016
Clothing and fashion	29%	25%	**12%**
Appliances or electrical equipment	15%	16%	**11%**
Furniture and things for the home	6%	10%	**6%**
Holiday, travel and accommodation	11%	7%	**21%**
Entertainment	6%	4%	**8%**
Computer software	6%	5%	**5%**
Music	2%	2%	**3%**
Games	2%	1%	**1%**
Movies / TV Shows	NA	NA	**3%**
Cosmetics / beauty	NA	NA	**9**
Other*	10%	24%	**21%**

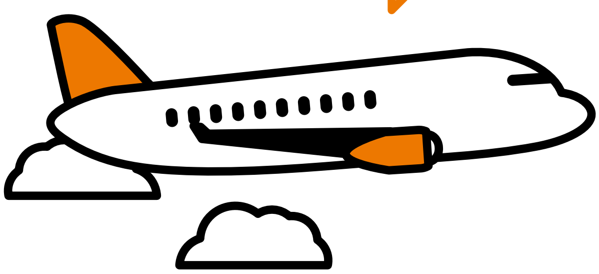
How was that research conducted?	2011	2012	2013	2014	2015	2016
Computer	79%	62%	67%	53%	43%	**32%**
Mobile device	6%	18%	23%	40%	40%	**44%**
Both	8%	8%	7%	7%	15%	**17%**
Neither	8%	13%	3%	1%	3%	**7%**

Base: Those who have ever researched products/services on social networking sites (76)
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?

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

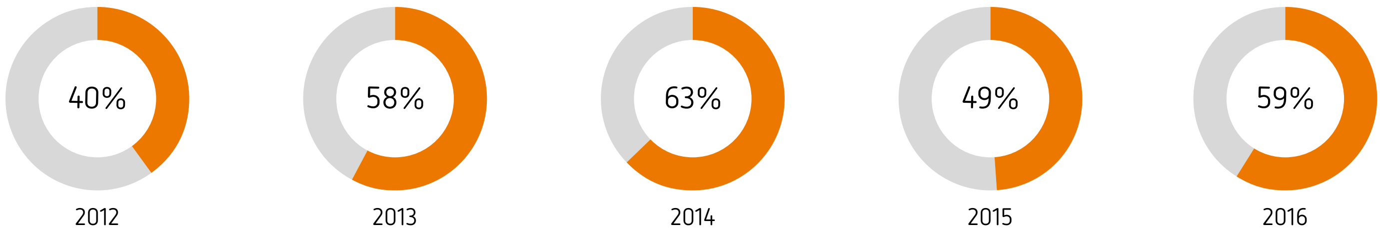
Notes:
- *NA = response option not provided*
- **Responses included cars, paint, camping equipment, toys, health items and others*

Holiday, travel and accommodation were the highest amongst recent searches

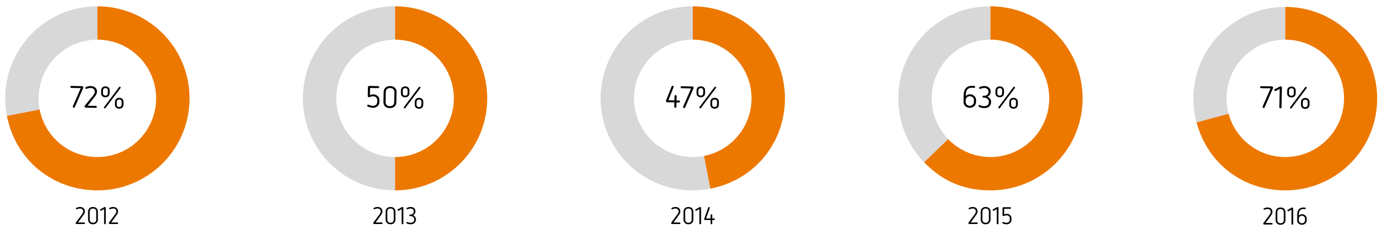


Path to purchase

Research which lead to a purchase



The resulting purchase was made online



Social media and brands

Around one third of social media users follow businesses or brands via social media and there has been little variation in this finding since 2013. Gender differences were again minimal and the under 30 age group is still the most prolific in terms of following brands, although the 30-39 and 40-49 year age groups did bridge the gap to some degree. By location this behaviour is similar to the national average everywhere except Tasmania and the NT, where just over a quarter follow brands on social media.

Follows a social networking group associated with a particular brand or business	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Total	20%	25%	35%	33%	32%	**36%**
Male	15%	25%	35%	27%	31%	**36%**
Female	23%	25%	36%	37%	34%	**35%**
18 to 29	20%	32%	42%	43%	48%	**45%**
30 to 39	23%	38%	31%	41%	30%	**35%**
40 to 49	8%	17%	31%	31%	25%	**39%**
50 to 64	22%	14%	23%	18%	33%	**30%**
65+	7%	17%	16%	11%	6%	**17%**

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

36%	**Total**
39%	Victoria
37%	South Australia
35%	Queensland
35%	New South Wales
33%	Western Australia
33%	Australian Capital Territory
28%	Tasmania
27%	Northern Territory
37%	**Metropolitan**
33%	**Regional**

Base: All social networking users (544)
Q10a. Do you follow any social networking group associated with any particular business or brand?
Note: The 18-29 results prior to 2015 were actually for 20-29s

What do consumers want from businesses or brands they follow?

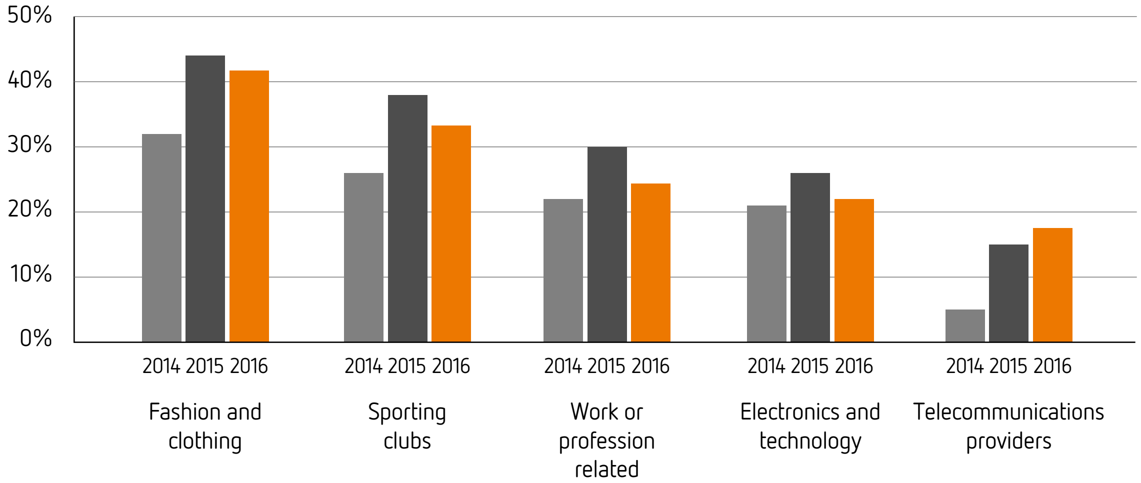
The most common reasons people follow businesses or brands on social media are for discounts or give-aways. Exclusive offers have emerged as one of the more popular benefits.

What do consumers want from businesses or brands that they follow?	2011	2012	2013	2014	2015	2016
Discounts	57%	64%	66%	62%	45%	**41%**
Give-aways	45%	54%	56%	51%	35%	**30%**
Coupons	36%	41%	44%	40%	30%	**26%**
Product information	41%	48%	49%	49%	27%	**31%**
Invitations to events	41%	38%	38%	34%	26%	**26%**
Tips and advice	NA	41%	48%	45%	24%	**26%**
Information about the company	32%	30%	35%	37%	24%	**25%**
Feedback forums	32%	31%	34%	34%	20%	**19%**
Industry information	NA	30%	32%	30%	21%	**22%**
Exclusive offers	NA	NA	NA	NA	NA	**30%**
None of these	NA	NA	NA	26%	34%	**34%**

Base: Users of social media (544)
Q10b. Which of these things would you like to get from businesses or brands you might follow on social media?
Notes:
- *NA = response option not provided*
- *'Exclusive offers' is a new category included in 2016*

Among Facebook users, 28% follow brands or businesses on Facebook, which compares with 30% last year and 31% in 2014. Their favourite category is still fashion, but of the five listed only telecommunications saw an increase relative to last year.

Types of brands / businesses followed on Facebook



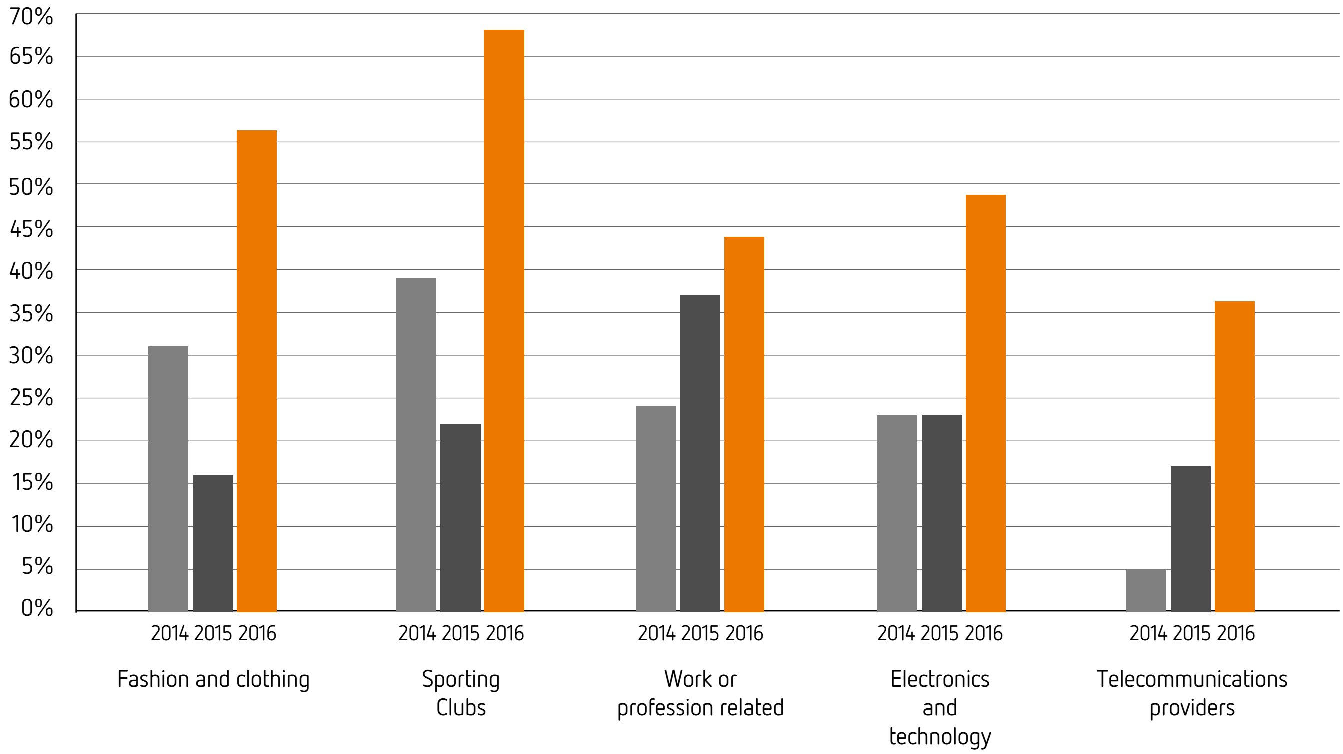
Base: Use Facebook (520)
Q10e. Do you follow any particular brand or business on Facebook?

Base: Facebook users who follow brands on Facebook (153)
Q10f. What type of brands or businesses do you like to follow?
Note: Multiple responses allowed for Q10f

What do consumers want from businesses or brands they follow?

Among Twitter users, 21% follow brands or businesses on this platform which is slightly fewer than in previous years (23% in 2015 and 26% in 2014). However, there was strong growth in the appeal of all five categories followed via Twitter.

Types of brands/businesses followed on Twitter



Base: Use Twitter (112)
Q10c. Do you follow any particular brand or businesses on Twitter?

Base: Twitter users who follow brands via Twitter (20)
Q10d. What type of brands or businesses do you like to follow?
Note: Multiple responses allowed for Q10d

Advertising on social networking sites

Attitudes towards advertising on social media remain polarised in a number of respects. There are still over a third of people who are happy to see ads (34%, was 38% in 2015) and over four in ten click on them occasionally to find out more (43%, was 42%). It is still the case that a slight majority (53%) take no notice of such ads, but this has come down from 69% in 2014 and 55% last year. Likewise, most ignore sponsored posts from businesses they don't follow, but this incidence has fallen from 72% to 67%. A new statement included this survey reveals that over four in ten will inspect a brand's social media presence before making an online purchase if they had not previously purchased from that brand's website.

Attitudes towards advertising on social network sites	Agree	Neutral	Disagree
I'm quite happy to see ads on social network sites	34%	25%	41%
I take no notice of ads on social network sites	53%	20%	27%
I'm turned off by companies or brands that advertise on social network sites	32%	34%	34%
I sometimes click on ads I see on social network sites to find out more	43%	13%	44%
I like sponsored posts from businesses I follow on social networks	27%	23%	50%
I ignore sponsored posts from businesses I don't follow	67%	16%	17%
I will inspect a brand's social media presence before making an online purchase if I have not purchased from their website before	41%	18%	41%

Base: Users of social networking sites (544)
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

Interaction with brands on social media

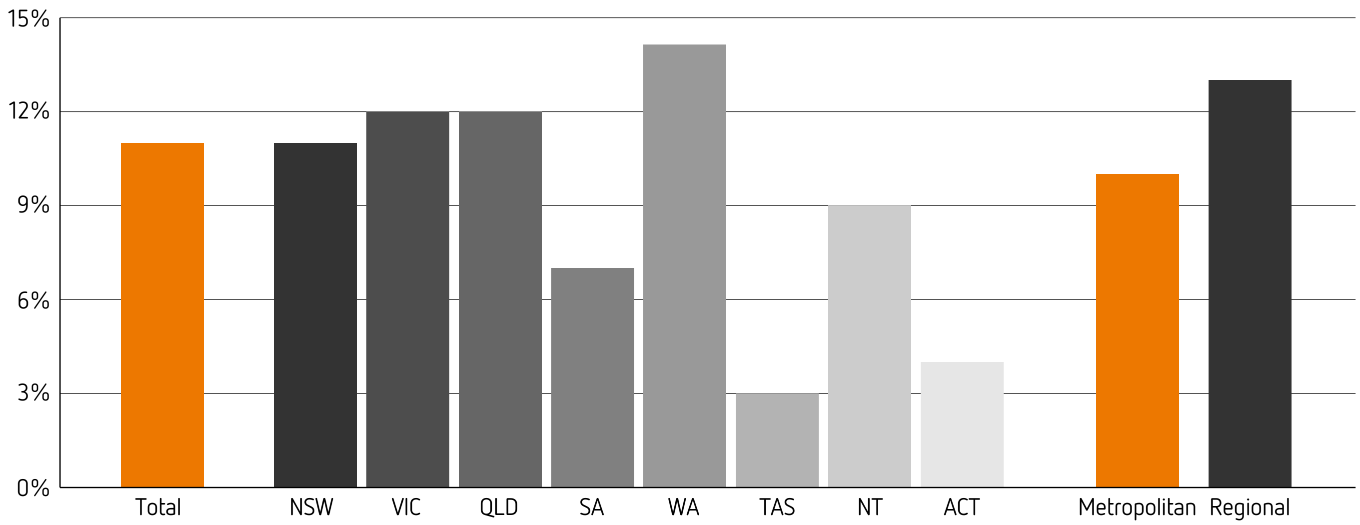
Brands are more likely to build trust if they interact positively with customers on social media, make their content engaging and relevant, and keep it regularly updated. The number of followers a brand has on social media sites does not always influence trust, but it does make a difference to some social media users (30%).

Are you more likely to trust the brand if…?	Yes	No	Unsure
They have a large number of followers across sites like Facebook, Instagram or Twitter	30%	49%	20%
They interact with their customers in a positive way on social media	52%	31%	17%
They regularly update their content	51%	31%	18%
You find their content engaging and relevant to you	52%	31%	17%

Base: Users of social networking sites (544)
Q12h. If or when you check a brand's social media presence, are you more likely to trust the brand if…?
Note: New question asked in 2016

Eleven percent stopped following at least one company or brand on social media in the three months prior to the survey. This happened more in WA (14%) and less in Tasmania (3%) than anywhere else. It is not shown below but females were more likely to have taken this action than males (13% to 9%) and so were the under 30s relative to the 65 plus age group in particular (14% to 5%).

Stopped following any company / brand on social media in the last three months



Base: All social networking users (544)
Q12i. In the last 3 months have you stopped following any company or brand on social media?

Interaction with brands on social media

A content issue was the main factor cited by those who stopped following any brand or company on social media in recent months. Irrelevant, unappealing or excessive content generated the most criticism. Too much advertising emerged but was not as much of a barrier as the other content issues.

Reason for no longer following a company / brand on social media in the last three months

52%	**Irrelevant or unappealing content**
32%	Too much content
21%	Too many ads
16%	Some other reason
5%	Too little content

Base: All social networking users who have stopped following any company / brand on social media (52)
Q12j. Was that because of…?
Note: New questions asked in 2016

Provision of online ratings

Thirty one percent of social media users have provided online ratings which is marginally higher than previously recorded and up seven points on last year. By gender and age there are no marked variations in the incidence of providing ratings but the NT (16%) is well below the national average, while NSW and Queensland are above (34% each). The average number of ratings provided has decreased from 14 to nine and was lower across the key demographics. As discovered before, experiences in hotels and motels, restaurants and bars and stores tend to attract the most ratings online.

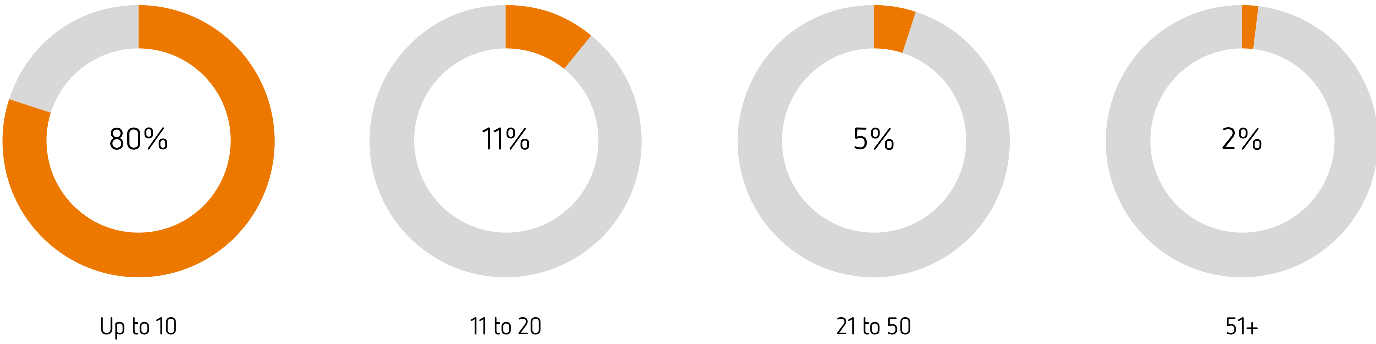
Proportion who have provided ratings online	2011	2012	2013	2014	2015	2016
Total	**27%**	**24%**	**25%**	**30%**	**24%**	**31%**
Male	28%	29%	29%	33%	25%	32%
Female	26%	19%	21%	27%	24%	30%
18 to 29	24%	28%	15%	32%	30%	33%
30 to 39	26%	22%	31%	28%	28%	37%
40 to 49	28%	18%	25%	28%	22%	31%
50 to 64	31%	27%	27%	34%	27%	26%
65+	24%	23%	27%	39%	14%	28%

Proportion who have provided ratings online by location

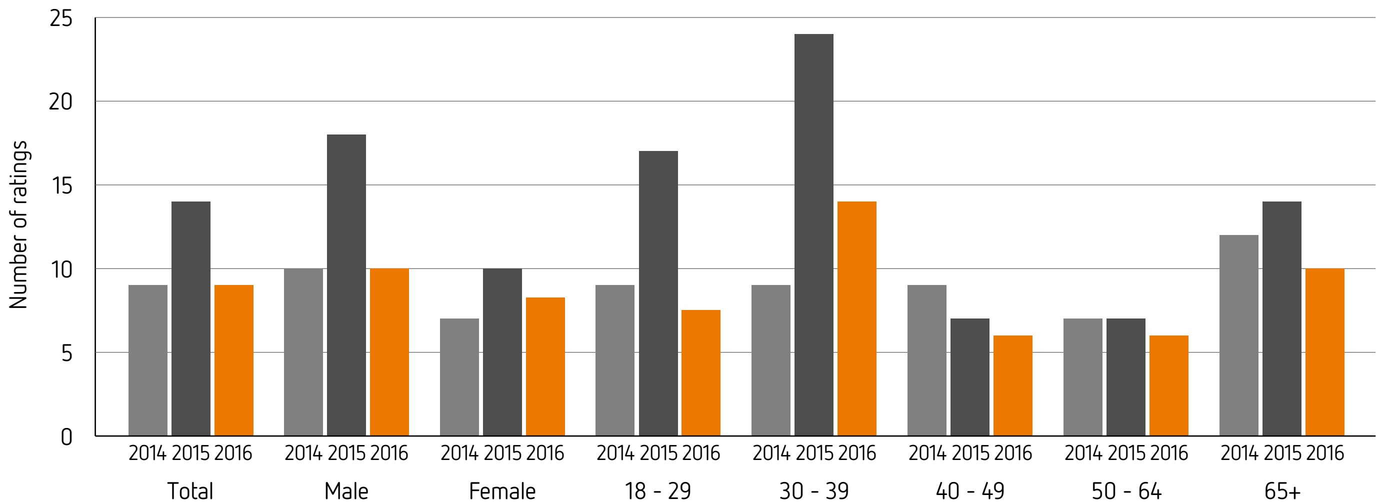
31%	**Total**
34%	New South Wales
34%	Queensland
30%	Victoria
28%	Australian Capital Territory
25%	Western Australia
25%	Tasmania
23%	South Australia
16%	Northern Territory
31%	**Metropolitan**
30%	**Regional**

Provision of online ratings

Number of ratings provided last year



Average number of ratings provided last year



Base: Access the Internet (798)
Q13a. Now some questions on online ratings – when 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?
Notes:
- *Rounding occurs*
- *Don't know responses not shown*
- *The 18-29 results prior to 2015 were actually for 20-29s*

Products and services rated	2014	2015	2016
Hotels and motels	25%	44%	**40%**
Restaurants and bars	25%	33%	**36%**
Stores	19%	31%	**31%**
Holiday destinations	22%	26%	**17%**
Movies	13%	15%	**15%**
Mobile apps	12%	16%	**19%**
Bands and music	5%	12%	**10%**

Base: Ever provide online ratings (221)
Q13b. For what types of products or services have you provided online ratings? (All other responses less than 5%)

Notes:
- *Rounding occurs*
- *NA = not asked*
- *Don't know responses not shown*

Use of online reviews or blogs

It continues to be the case that most Australian Internet users (60%) read online reviews or blogs, and while this incidence is greater than in 2015, it remains behind prior observations. This year's growth has been driven more by females than males, and by the 40 plus age group than younger people. In fact the under 30 age group have become significantly less interested in online reviews and blogs since 2013 – down from 80% to 59% now.

Queensland (70%) is the only location significantly above the national average on this measure with the NT (37%), WA (45%) and Tasmania (46%) quite far behind. Most readers are still likely to look at up to five reviews before making a decision, but some growth in the number of reviews consulted was indicated in the survey.

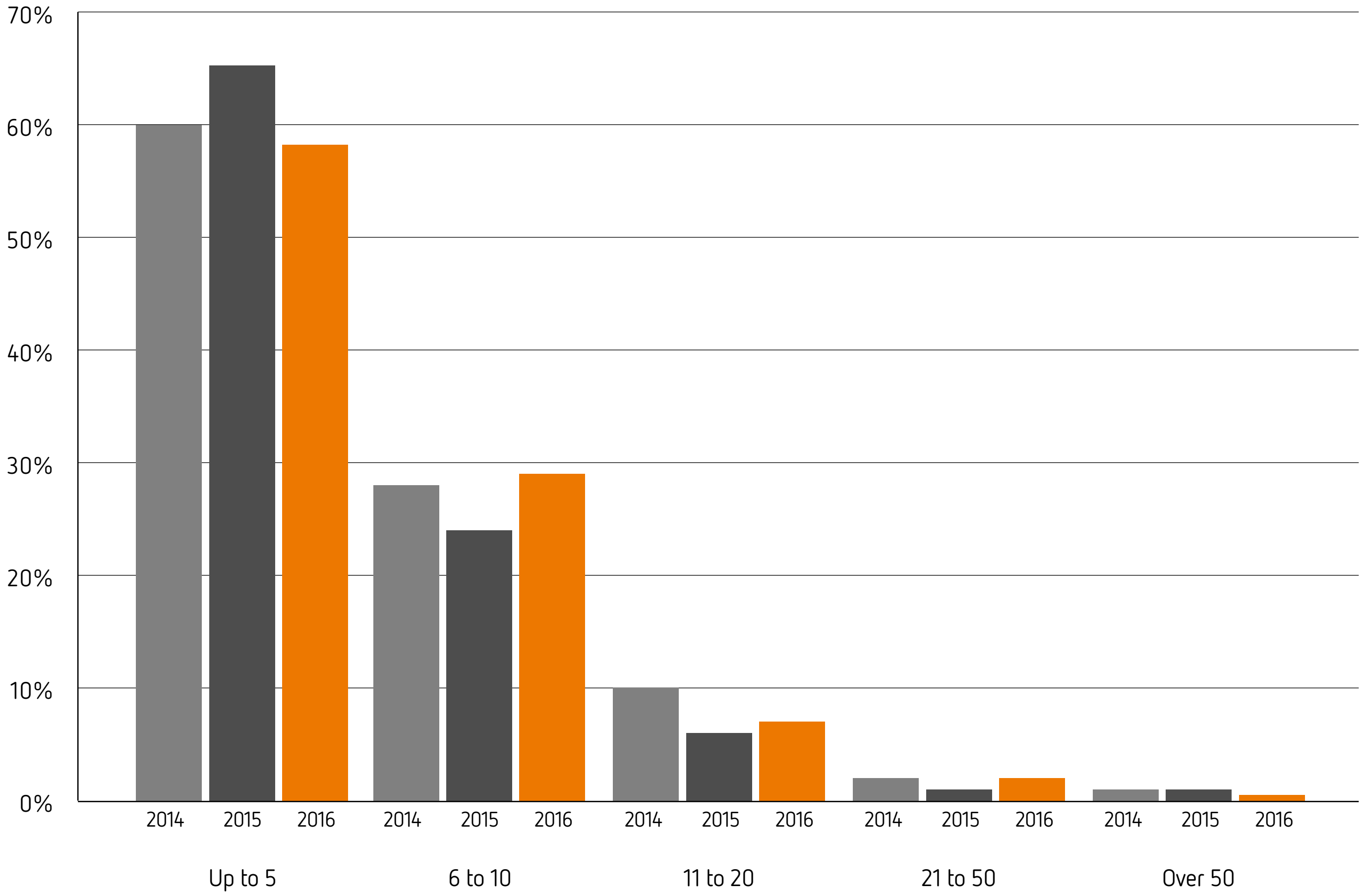
Proportion who have read online reviews or blogs	2011	2012	2013	2014	2015	2016
Total	63%	68%	74%	67%	55%	**60%**
Male	65%	73%	77%	73%	55%	**56%**
Female	61%	64%	71%	61%	55%	**63%**
18 to 29	75%	80%	80%	70%	67%	**59%**
30 to 39	65%	65%	76%	77%	64%	**65%**
40 to 49	72%	73%	76%	68%	55%	**74%**
50 to 64	56%	57%	68%	60%	53%	**57%**
65+	44%	73%	65%	53%	35%	**44%**

Proportion who have read online reviews or blogs

60%	**Total**
70%	Queensland
61%	New South Wales
59%	Victoria
58%	Australian Capital Territory
56%	South Australia
46%	Tasmania
45%	Western Australia
37%	Northern Territory
63%	**Regional**
58%	**Metropolitan**

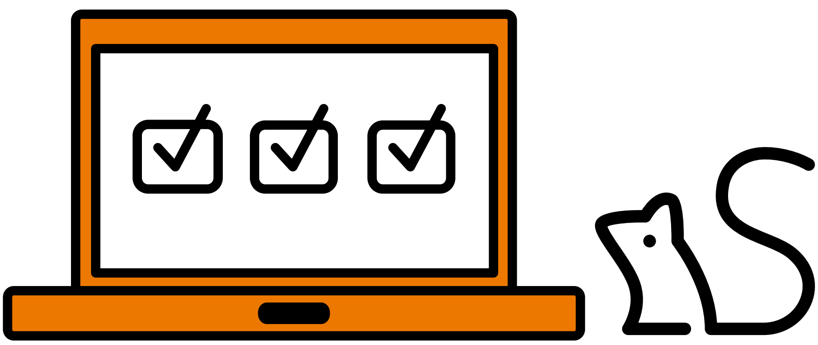
Use of online reviews or blogs

Number of reviews respondents expect to read before making a decision



Base: Access the Internet (798)
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?
Note: The 18-29 results prior to 2015 were actually for 20-29s

Base: Those who look at online reviews (444)
Q14b. Approximately how many reviews would you expect to read before you make a decision?



Posting of online reviews or blogs

Twenty seven percent of Internet users have posted reviews or blogs which is very much in line with earlier results. Males and females do not differ in this respect, while by age group this incidence ranges from 21% in the 65 plus segment to 34% among 30-39s. As in 2015, reviews and blogging occur more in the two biggest states, NSW and Victoria, than elsewhere. It is least prevalent in the NT (11%), with Tasmania (17%) also under-represented in this behaviour.

Experiences at hotels and motels or restaurants and bars again prove to be the subject of most reviews, with the average number posted in the last year being 14 – almost double the 2015 average of 8. If the business in question responds to a bad review, fewer now believe this could change their opinion – 19% answered "yes" and 37% "maybe". By gender and age there were no great departures from the total average in the "yes" response.

Proportion who post online reviews or blogs	2011	2012	2013	2014	2015	2016
Total	24%	24%	28%	28%	27%	**27%**
Male	26%	31%	32%	34%	27%	**27%**
Female	21%	17%	25%	22%	28%	**27%**
18 to 29	23%	23%	25%	25%	31%	**26%**
30 to 39	29%	24%	32%	35%	34%	**34%**
40 to 49	21%	19%	39%	35%	27%	**31%**
50 to 64	25%	28%	30%	30%	30%	**23%**
65+	21%	22%	34%	20%	14%	**21%**

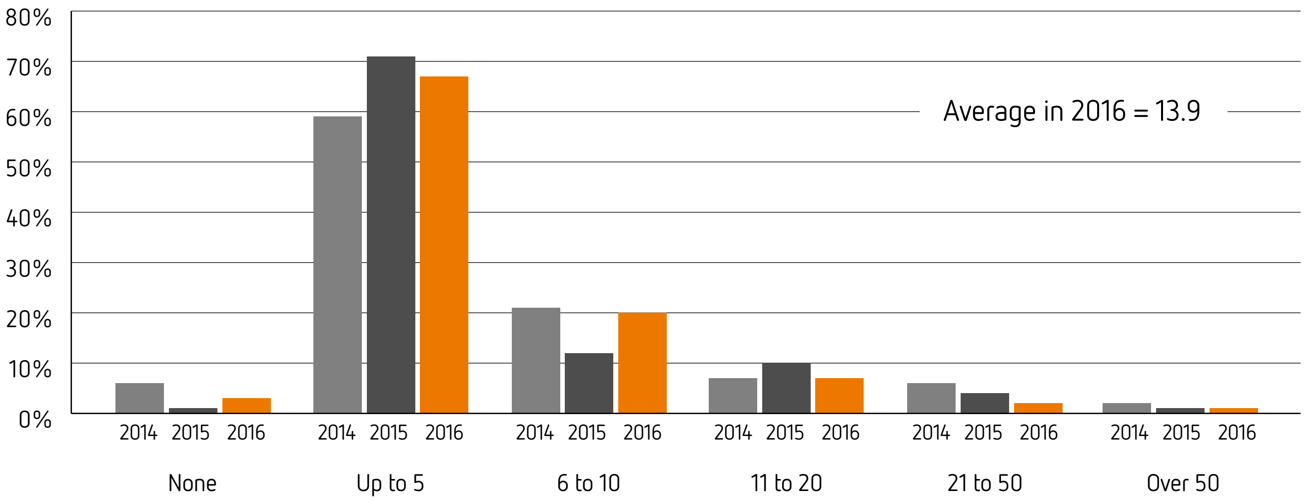
Proportion who post online reviews or blogs

27%	**Total**
31%	Victoria
29%	New South Wales
25%	Queensland
25%	South Australia
21%	Western Australia
20%	Australian Capital Territory
17%	Tasmania
11%	Northern Territory
27%	**Metropolitan**
27%	**Regional**

Base: Access the Internet (798)
Q14c. Have you ever posted an online review or blog, where you provide your thoughts or opinions on products, services, entertainment and so forth?
Note: The 18-29 results prior to 2015 were actually for 20-29s

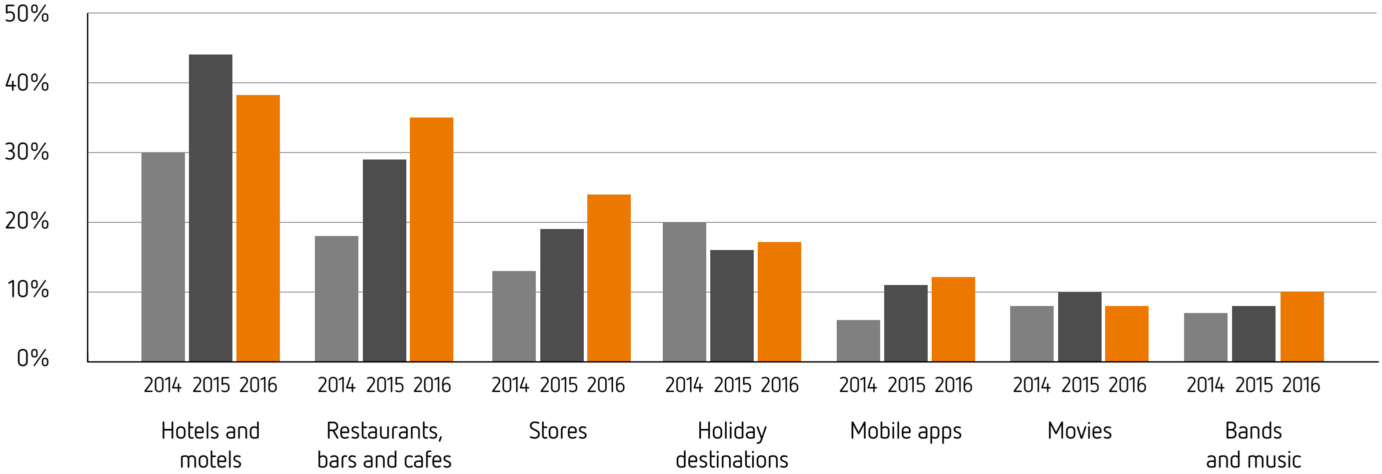
Posting of online reviews or blogs

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?

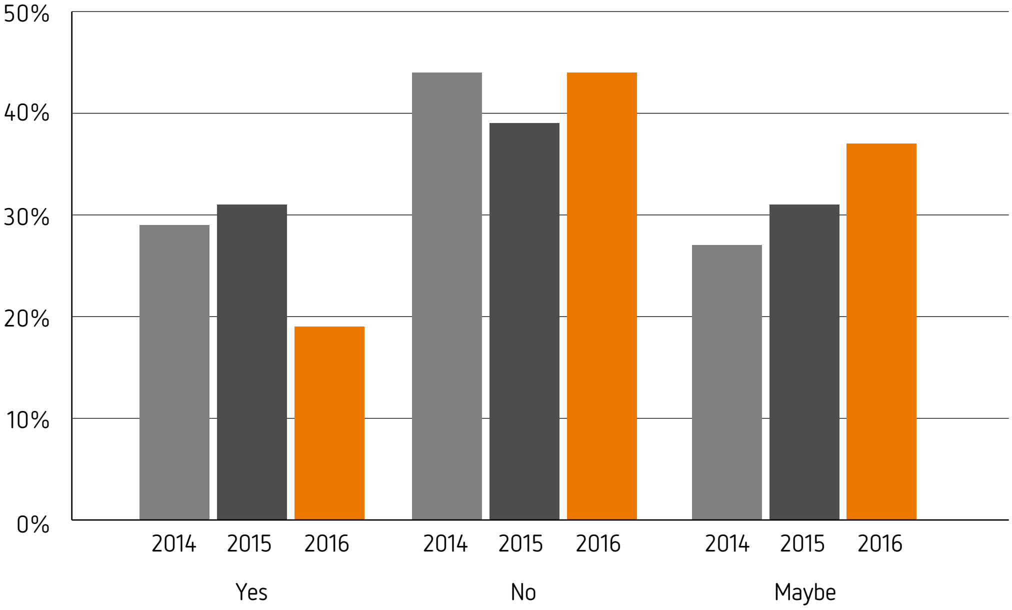
Products and services reviewed



Base: Ever provide online reviews (193)
Q14d. For what types of products or services have you provided online reviews or blogs?
Note: All other responses less than 5%

Posting of online reviews or blogs

Might change opinion if business responds to feedback on social media



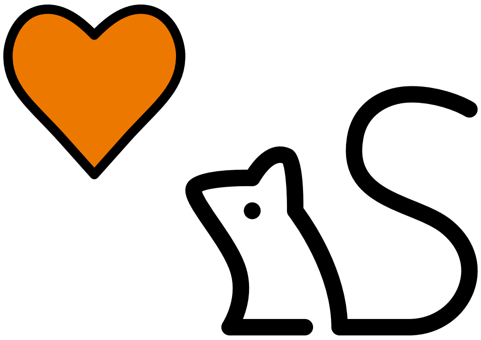
Might change opinion if business responds to feedback on social media

	Yes	No	Maybe
Total	19%	44%	37%
Male	17%	43%	40%
Female	21%	45%	34%
18 to 29	19%	45%	36%
30 to 39	19%	28%	53%
40 to 49	20%	45%	35%
50 to 64	16%	47%	37%
65+	23%	61%	16%

Base: Ever provide online reviews (193)
Q14e. If a business gets back to you after you have posted a bad review, would that change your opinion?
Note the 18-29 results prior to 2015 were actually for 20-29s

Behaviour on social media

This new set of questions reveals further insights into the behaviours of social media users. Deleting friends (43%) is relatively pronounced, while accepting friend requests from strangers is not uncommon (17%). Ten percent claim to have dated someone they met online. Such dating has been primarily concentrated in the under 40 age group. Ending or having a romantic relationship ended on social media has been experienced by less than 5% of people. These two behaviours were more evident in the under 30s (5% and 10% respectively) than 30-39s (3% in each case) and 40-49s (2% and 3% respectively).



Which have you done on social media?

49%	**None of the below**
43%	Deleted any friends
17%	Accepted requests to connect from people you don't know
10%	Dated someone you met online
4%	Had someone end a romantic relationship with you on social media
2%	Ended a romantic relationship on social media

Q15. Which, if any, of the following have you done on social media?

Which have you done on social media?	Male	Female	18-29	30-39	40-49	50-64	65+
Accepted requests to connect from people you don't know	19%	16%	34%	16%	23%	9%	5%
Deleted any friends	39%	47%	62%	53%	42%	25%	37%
Dated someone you met online	10%	10%	21%	20%	5%	2%	2%
Ended a romantic relationship on social media	3%	1%	5%	3%	2%	<1%	0%
Had someone end a romantic relationship with you on social media	4%	3%	10%	3%	3%	0%	2%
None of the above	50%	48%	23%	41%	49%	67%	63%
Base	*171*	*212*	*56*	*82*	*92*	*87*	*66*

Which have you done on social media?	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Accepted requests to connect from people you don't know	12%	16%	22%	27%	27%	10%	0%	6%	16%	19%
Deleted any friends	40%	43%	48%	40%	52%	44%	29%	28%	42%	44%
Dated someone you met online	13%	9%	6%	8%	12%	9%	15%	9%	14%	4%
Ended a romantic relationship	2%	2%	0%	6%	2%	9%	7%	0%	3%	0%
Had someone end a romantic relationship with you	4%	4%	4%	6%	0%	9%	0%	0%	4%	3%
None of the above	52%	50%	48%	42%	39%	56%	57%	69%	50%	48%
Base	*91*	*87*	*61*	*41*	*44*	*25*	*10*	*24*	*234*	*149*

Q15. Which, if any, of the following have you done on social media?
Notes: Some bases are quite small in the location results above. Rounding occurs

Section 2:

Australian businesses and social media

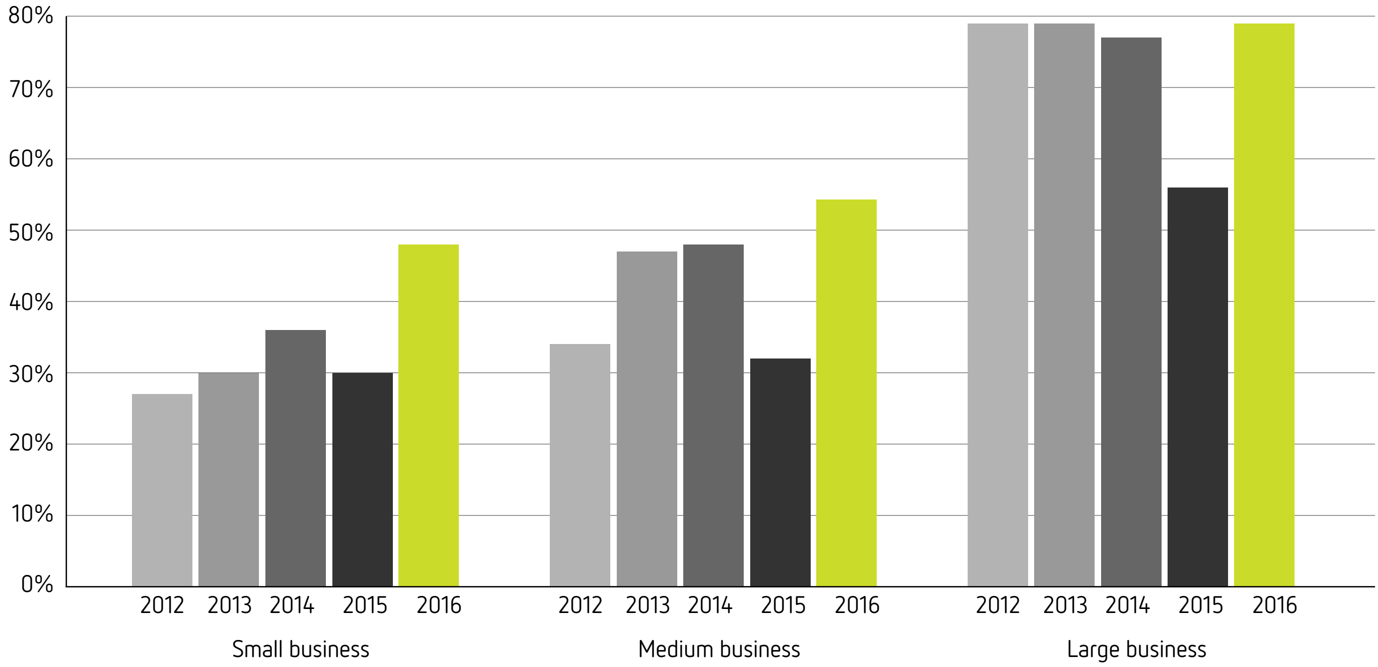
Use of social media – summary

More businesses now have a social media presence than has previously been recorded. Forty eight percent of small businesses, 54% of medium businesses and 79% of large businesses are now on social media. Facebook continues to be the most popular platform by far, with LinkedIn and Twitter relatively prominent, particularly in medium and large businesses where Instagram and YouTube are also common. Other platforms do not have widespread appeal, although almost one in five large businesses use Google+.

Four percent of small businesses, 2% of medium sized businesses and 2% of large businesses claimed to have removed a social media presence this year. The main reasons were that it required too much time or that there was no return on their investment.

Seventeen percent of small businesses not currently using social media anticipate adding a presence in the next year. This is also true for 13% of medium sized businesses and 29% of large businesses. Those with no intention primarily said they don't see a benefit to their business from using social media.

Proportion of businesses that have a social media presence



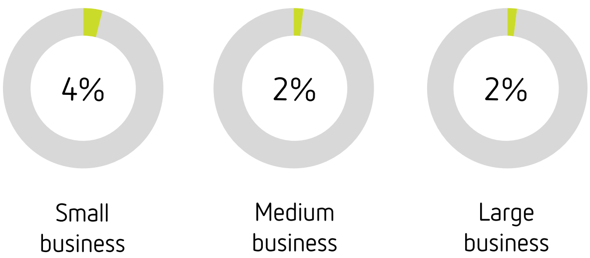
Base: All businesses: Small: n=900. Medium: n=100. Large: n=100
QB1a. Does your business have a social media presence? This might include having a Facebook page, Google+, YouTube, Foursquare, Pinterest, Yelp, Vine, Instagram, being active on Twitter or LinkedIn, having a blog, hosting forums or having a social media based rating system?

Use of social media – summary

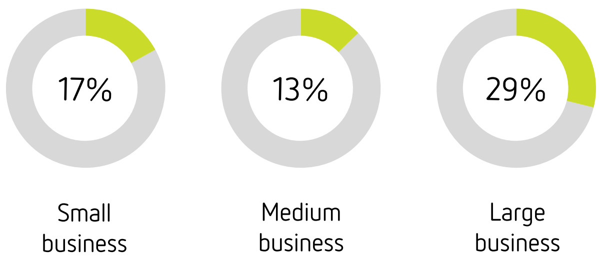
Social media presence includes:	Small	Medium	Large
Facebook	89%	79%	89%
Twitter	24%	43%	61%
LinkedIn	22%	56%	59%
Google+	10%	10%	19%
YouTube	3%	16%	41%
Instagram	12%	28%	42%
Pinterest	2%	11%	11%
Blog	4%	4%	9%
Two-way online communication forum	1%	2%	5%
Snapchat	0%	0%	3%
Yelp	2%	0%	1%

Base: All businesses with social media presence: Small: n=434. Medium: n= 53. Large: n=79
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

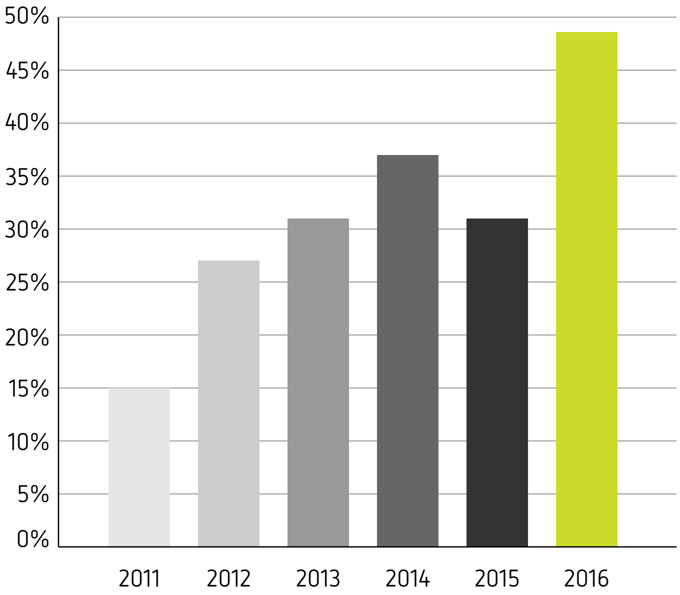


Base: Do not have social media presence: Small: n=467. Medium: n= 47. Large: n=21
QB1b. Has your business had a social media presence in the past?
QB1d. Are you planning on getting a social media presence in the next 12 months?
QB1e. Why not?

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

Social media use is at the highest level recorded in all sectors but the Cultural, Recreational and Personal Services sector is still the most active. Retail; Hospitality; and Communication, Property and Business Services are well above the national average. Also consistent with prior results, the Building and Construction and Manufacturing sectors have lower usage of social media.

Proportion of SMBs with a social media presence – Total

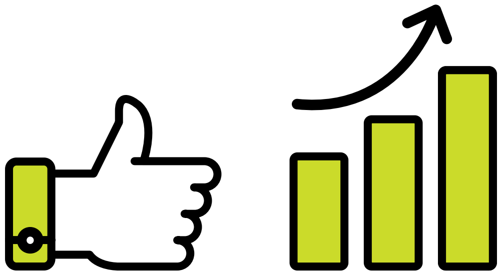


Proportion of SMBs with a social media presence	2011	2012	2013	2014	2015	2016
Total	**15%**	**27%**	**31%**	**37%**	**31%**	**48%**
Cultural, Recreational and Personal services	41%	58%	60%	59%	49%	77%
Retail Trade	14%	30%	32%	50%	41%	61%
Hospitality (Accommodation, Cafes and Restaurants)	33%	47%	54%	59%	45%	60%
Communication, Property and Business Services	14%	30%	27%	44%	24%	60%
Health and Community Services	4%	23%	23%	26%	42%	49%
Wholesale Trade	13%	27%	44%	21%	32%	45%
Finance and Insurance	10%	13%	18%	26%	29%	41%
Transport and Storage	18%	23%	17%	13%	32%	38%
Manufacturing	9%	16%	18%	26%	19%	35%
Building and Construction	5%	10%	25%	19%	19%	32%

Base: All SMBs: Small: n=900. Medium: n= 100
QB1a. Does your business have a social media presence? This might include having a Facebook page, being active on Twitter, Instagram or LinkedIn, having a blog, hosting forums or having a social media based rating system?

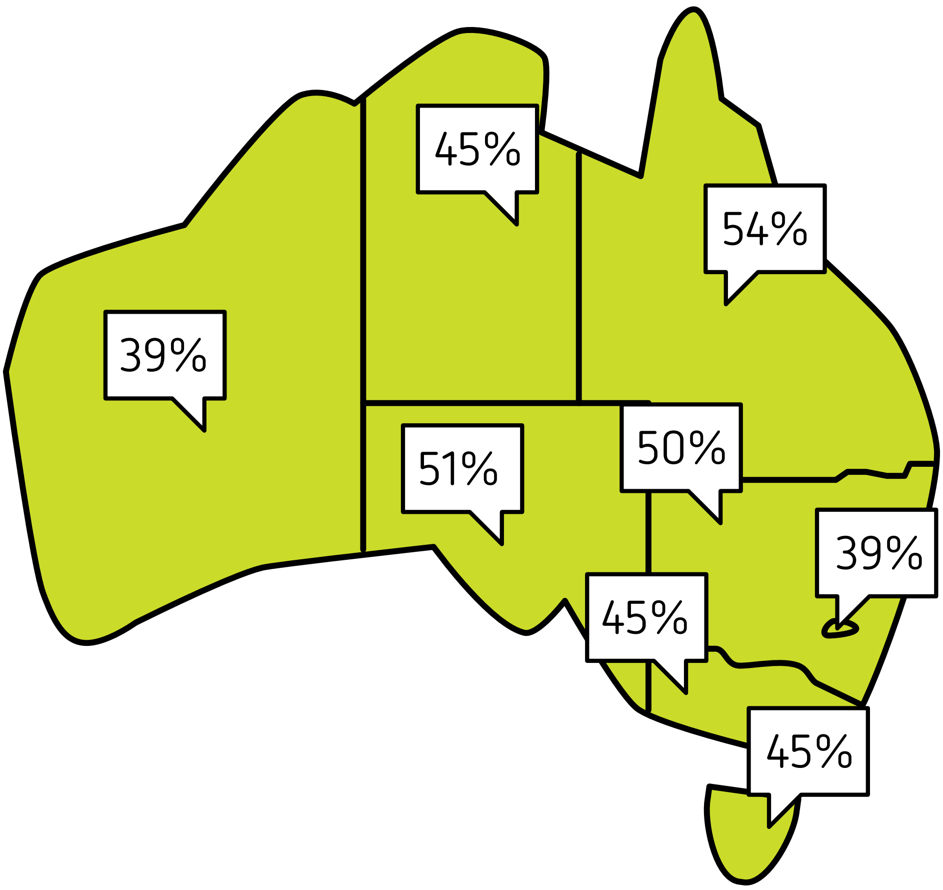
Use of social media by location (small to medium)

A social media presence is highest among Queensland SMBs, with South Australia and NSW also exceeding the national average. WA and the ACT are distinctly below average. However, there has been growth across the board this year. Regional SMBs are slightly more likely to have a social media presence than their metropolitan counterparts.



Proportion of SMBs that have a social media presence	2011	2012	2013	2014	2015	2016
Total	**15%**	**27%**	**30%**	**37%**	**31%**	**48%**
New South Wales	14%	30%	32%	36%	38%	50%
Victoria	14%	23%	27%	31%	25%	45%
Queensland	20%	28%	31%	48%	32%	54%
South Australia	11%	25%	32%	35%	24%	51%
Western Australia	14%	30%	34%	35%	27%	39%
Tasmania	12%	28%	33%	41%	25%	45%
Northern Territory	15%	30%	23%	35%	24%	45%
Australian Capital Territory	20%	34%	31%	43%	27%	39%
Metropolitan	15%	29%	29%	35%	30%	46%
Regional	15%	25%	35%	40%	31%	51%

Base: All SMBs: Small: n=900. Medium: n=100
QB1a. Does your business have a social media presence? This might include having a Facebook page, Google+, YouTube, Foursquare, Pinterest, Yelp, Vine, Instagram, being active on Twitter or LinkedIn, having a blog, hosting forums or using a social media based rating system?



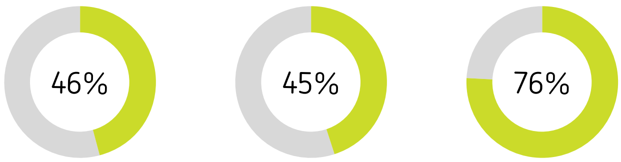
Uses of social media

One of the main uses of social media for businesses is for two way communication. However, this appears to be less common than last year in the SMB sector.

Meanwhile, its appeal as a customer feedback mechanism for ratings and reviews has increased among SMBs relative to 2015. This is not the case for large businesses but they remain much more likely to use social media this way than SMBs.

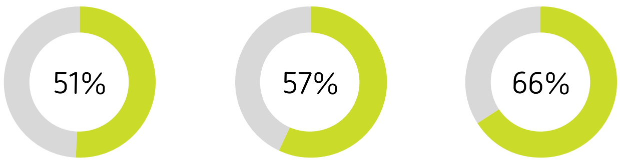
Less than half of SMBs, but more than three quarters of large businesses, invite customers to provide comments, ratings and reviews.

Even though discounts and coupons are a key reason why consumers connect with businesses on social media, the majority of SMBs and large businesses remain unlikely to offer them as an incentive. Among businesses offering such incentives, discounts are easily the most popular with small businesses (75%), while giveaways (62%) stand out for medium sized businesses (62%) and large businesses (69%).



Small business   Medium business   Large business

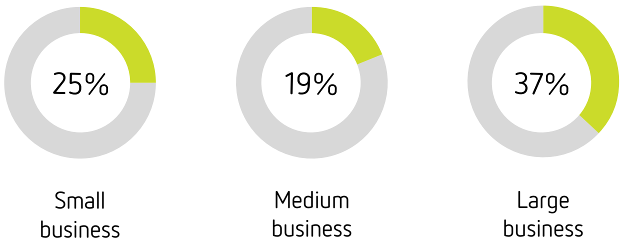
Use social media for two-way communication with clients and contacts	2012	2013	2014	2015	2016
Small	50%	54%	45%	64%	**46%**
Medium	55%	62%	55%	69%	**45%**
Large	74%	75%	65%	84%	**76%**



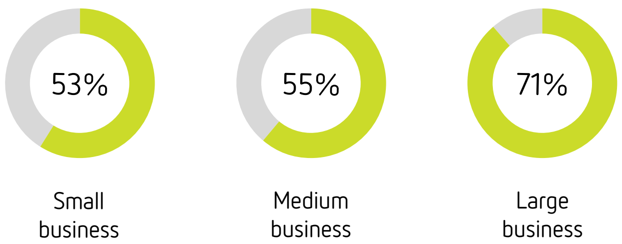
Small business   Medium business   Large business

Invite online comments, ratings and reviews on social media sites	2012	2013	2014	2015	2016
Small	55%	56%	46%	43%	**51%**
Medium	56%	58%	59%	45%	**57%**
Large	86%	73%	53%	68%	**66%**

Uses of social media



Offer incentives to consumers via social media	2012	2013	2014	2015	2016
Small	34%	28%	28%	25%	**25%**
Medium	27%	33%	43%	25%	**19%**
Large	35%	38%	41%	30%	**37%**



Engage with people who provide feedback about your business with ratings & reviews on social media*	2015	2016
Small	44%	**53%**
Medium	46%	**55%**
Large	74%	**71%**

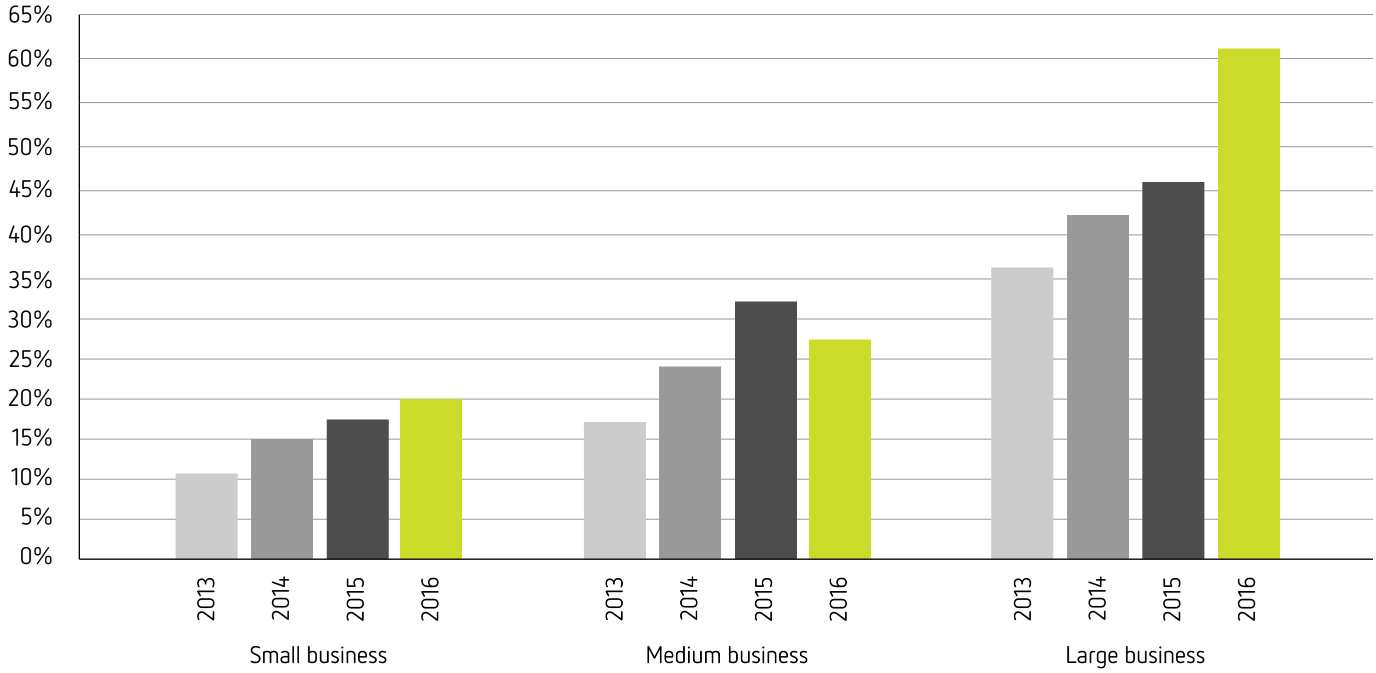
Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB6a. Do you use your social media channels to engage in two-way communication with your customers and contacts?
QB15. Do you offer incentives to consumers via your social media presence? What sort of incentives 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 with ratings and reviews on social media sites?
*Note: *Question not reported on in previous years hence no comparison available before 2015*

Advertising on social media sites

We again see that paying for advertising on social media correlates with business size, with strong growth among large businesses this year. Large businesses are much more likely to now pay to advertise on social media than small businesses.

Facebook is again the most favoured social media advertising channel across the business world with LinkedIn, Twitter and Instagram gaining traction. Most businesses paying to advertise on Facebook and Instagram found their advertising effective but medium and large sized businesses are more complimentary of LinkedIn and Twitter than small businesses.

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



Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB4b. Have you paid to advertise on a social media channel?

Proportion of businesses that advertise on each channel	Small	Medium	Large
Facebook	83%	83%	90%
LinkedIn	4%	21%	33%
Twitter	5%	34%	17%
Instagram	1%	28%	29%

Base: Have paid to advertise on a social media channel: Small: n=80. Medium: n= 15. Large: n=48
QB4c. What channel did you pay to advertise on?

Proportion that found paying to advertise on a social media channel effective	Small	Medium	Large
Facebook	56%	66%	98%
Twitter*	43%	78%	63%
LinkedIn**	47%	66%	75%
Instagram***	100%	73%	86%

Base: Have paid to advertise on these social media channels: Small: n=80. Medium: n= 15. Large: n=43
QB4d. Was that effective for your business?
*Notes: *These results are based on two small, four medium and eight large businesses who advertised on Twitter*
***These results are based on three small, three medium and 16 large businesses who advertised on LinkedIn*
****These results are based on one small, two medium and 14 large businesses who advertised on Instagram*

Who is responsible for a business' social media presence?

Internal management of social media is much more common than outsourcing for all business sizes. However, medium size businesses are outsourcing their social media management more than small or large businesses. Among organisations that do outsource, specialist social media and communications, PR or media agencies are the preferred choices.

For small businesses, the owner or manager continues to be the most likely person responsible for maintaining the social media presence, although more are now allocating this task to the marketing department. Medium and large businesses still mostly expect their marketing department to play this role but the communications department is now also regularly involved.

Is your social media...	Small	Medium	Large
Managed internally?	89%	79%	89%
Outsourced?	6%	1%	4%
A combination of internal and outsourced?	5%	20%	8%

Outsourced to...	Small	Medium	Large
PR, communications or media agency	34%	45%	11%
Digital, web or Internet agency	33%	48%	44%
Specialist social media agency	17%	33%	56%
Other	15%	0%	0%

Small business	2011	2012	2013	2014	2015	2016
Business owner or manager	82%	79%	72%	76%	78%	**66%**
Marketing department	10%	10%	11%	12%	15%	**22%**
IT department	2%	5%	10%	6%	3%	**5%**
Communications department	2%	3%	4%	4%	2%	**5%**
External firm	4%	3%	3%	2%	2%	**3%**

Medium business	2011	2012	2013	2014	2015	2016
Marketing department	52%	44%	43%	56%	63%	**58%**
Business owner or manager	36%	36%	40%	25%	23%	**18%**
IT department	6%	13%	7%	8%	9%	**13%**
External firm	6%	0%	3%	2%	3%	**11%**
Communications department	0%	8%	8%	9%	1%	**0%**

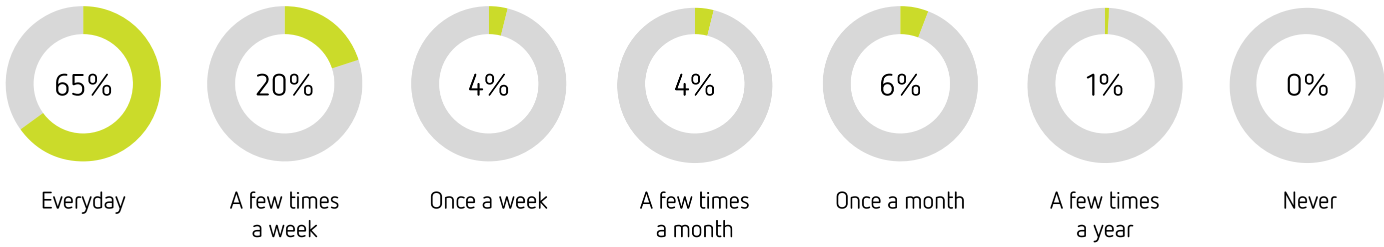
Large business	2011	2012	2013	2014	2015	2016
Marketing department	74%	64%	66%	77%	61%	**53%**
Communications department	0%	17%	10%	13%	30%	**33%**
Business owner or manager	17%	10%	8%	4%	7%	**8%**
IT department	0%	5%	3%	4%	2%	**6%**
External firm	1%	0%	3%	2%	0%	**0%**

Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB7a. Is your social media managed internally or outsourced?
QB7b. What type of external firm is it outsourced to? (multiple responses allowed)
QB8. Which area of your business has overall responsibility for your social media presence?
Note: Rounding occurs

How often do businesses update their social media?

The results were fairly consistent with last year, with the frequency of updating social media correlating with the size of the business. A majority of large businesses conduct daily updates while SMBs tend to spread this task out more over the course of a week.

Large Businesses 2016



Small business	2012	2013	2014	2015	2016
Everyday	22%	18%	20%	20%	**23%**
A few times a week	15%	17%	13%	21%	**22%**
Once a week	28%	24%	22%	29%	**24%**
A few times a month	9%	11%	13%	8%	**10%**
Once a month	9%	13%	18%	11%	**10%**
A few times a year	9%	14%	11%	6%	**6%**
Never	8%	4%	3%	5%	**5%**

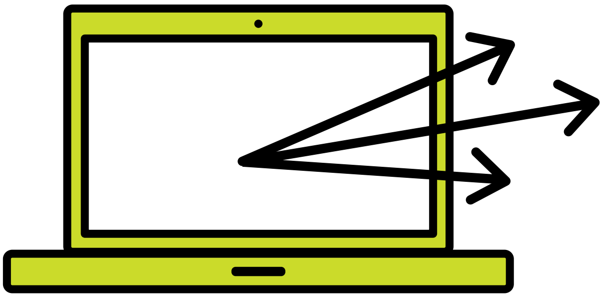
Medium business	2012	2013	2014	2015	2016
Everyday	39%	36%	42%	34%	**33%**
A few times a week	12%	15%	21%	27%	**27%**
Once a week	19%	24%	16%	12%	**23%**
A few times a month	7%	4%	7%	10%	**4%**
Once a month	12%	6%	6%	9%	**12%**
A few times a year	5%	10%	6%	4%	**1%**
Never	6%	6%	3%	4%	**0%**

Large business	2012	2013	2014	2015	2016
Everyday	60%	65%	65%	56%	**65%**
A few times a week	18%	11%	25%	25%	**20%**
Once a week	10%	10%	8%	13%	**4%**
A few times a month	2%	5%	0%	0%	**4%**
Once a month	7%	4%	0%	5%	**6%**
A few times a year	3%	1%	2%	0%	**1%**
Never	2%	4%	0%	2%	**0%**

Base: All businesses with social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB5. How often do you monitor or update your social media presence?

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

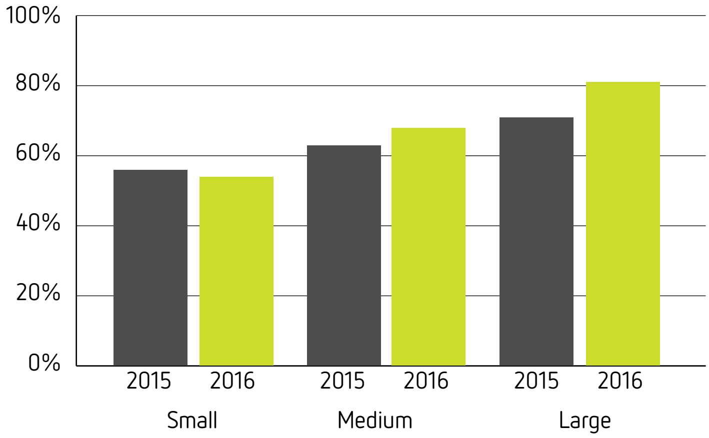
Among SMBs with a social media presence, 34% of small and 26% of medium sized businesses do not have a strategy to drive people to their sites. This is the case for only 6% of large businesses. Advertising their social media presence in traditional media or on other websites correlates with business size and is not uncommon, especially for large businesses. They are also more likely to use links in other directories, competitions and events than SMBs. Paying social influencers to promote their business is rare across the board. Conversely, a majority of businesses have options on their website that allow people to share information about the business through their social media profiles. This was also the case in 2015 and appears to have grown for large businesses.



Means of driving traffic to social media presence	Small	Medium	Large
Have links on our website to our social media site	39%	44%	70%
Like, follow or subscribe to others on social media sites	25%	22%	58%
Advertise our social media presence on other websites	12%	27%	33%
Advertise our social media presence in traditional media	15%	23%	46%
Include links in directories	6%	12%	23%
Competitions	4%	6%	19%
Events	4%	6%	20%
Pay social influencers to promote our business	1%	6%	1%
We don't have a strategy to drive traffic to our social media presence	34%	26%	6%

Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB9a. How do you drive traffic to your social media presence?
Note: The response set for this question was expanded in 2016 and so a direct comparison with prior results is not possible

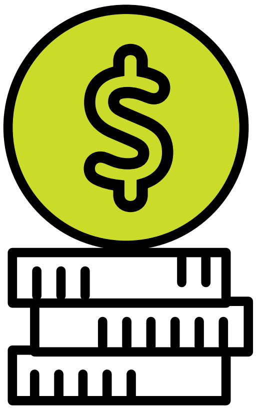
Have buttons on website to help people share info on social media



Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB9b. Do you include social media buttons on your website to help people share information about your business on their social media presence?
*Note: *Question not reported on in previous years, hence no comparison available before 2015*

Business investment in social media

Quite a few businesses with a social media presence do not have a budget for this activity or the respondent could not answer this question, which was also the case in previous surveys. Among those who discussed their budget, the average amount spent has decreased for all businesses in the last 12 months.



Annual budget on social media	Small	Medium	Large
Nothing	34%	14%	18%
Up to $500	10%	3%	1%
$501 to $1,000	6%	3%	6%
$1,001 to $5,000	13%	23%	20%
$5,001 to $10,000	6%	13%	9%
$10,001 to $50,000	5%	11%	11%
Over $50,000	0%	3%	1%
Don't know/refused	26%	30%	34%

Average budget	2011	2012	2013	2014	2015	2016
Small	$2,050	$3,410	$1,970	$4,560	$5,869	**$3,595**
Medium	$6,500	$16,920	$11,780	$38,800	$18,098	**$10,084**
Large	$78,750	$100,480	$79,710	$33,050	$10,088	**$8,692**

Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB3. Approximately, what is your current investment in social media? What do you spend a year?
Note: Rounding occurs

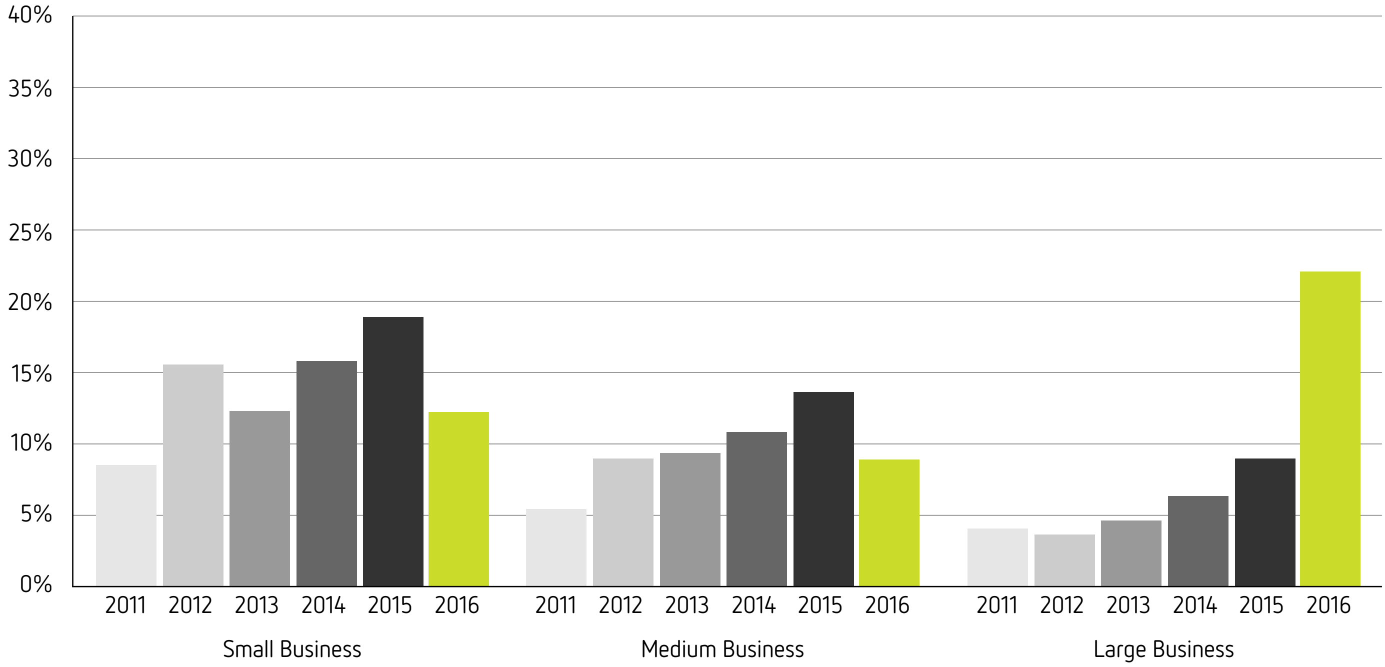
Businesses are spending less per annum on average on social media

Percentage of marketing budget allocated to social media

Almost a third of small businesses and 16% of medium and large businesses have no allocation in their marketing budget for social media. Among those providing a percentage estimate, we saw a fall in the average for SMBs but growth for large businesses relative to last year. The budget allocation to social media in large businesses is now almost double the allocation of SMBs in percentage terms.

Percentage of marketing budget allocated to social media	Small	Medium	Large
None	32%	16%	16%
Up to 10%	23%	57%	38%
11% to 20%	6%	0%	4%
21% to 50%	8%	4%	4%
Over 50%	5%	5%	15%
Don't know/refused	26%	18%	23%

Average proportion of marketing budget allocated to social media



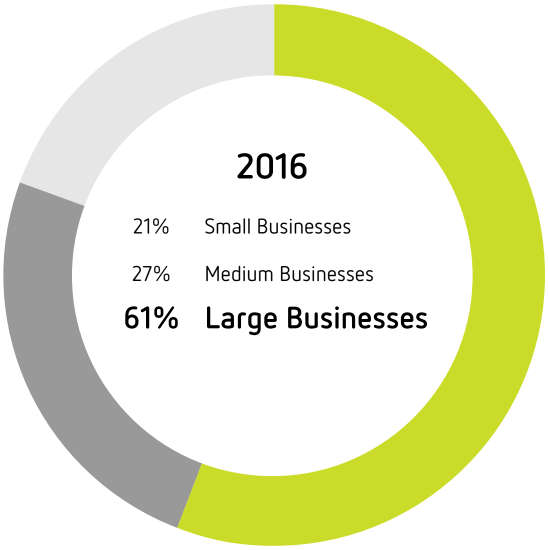
Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
QB4a. Approximately what percentage of your marketing budget is allocated to social media?
Note: Rounding occurs

How businesses measure the success of their social media investment

Again we found only a minority of SMBs measure their social media ROI, however there has been a jump in the number of large businesses now reporting on this. Small businesses who monitor this business activity rely on response numbers on social media or ask customers directly how they found them. For medium and large businesses, monitoring response numbers on social media is the most common guide, while online, automated and analytical tools are also common.

Quite a few respondents found it difficult to provide a percentage estimate of their return on social media to date but the average estimates among those that did were 28% for small businesses, 13% for medium sized businesses and 40% for large businesses.

Proportion of businesses that measure return on investment for social media



Proportion of businesses that measure ROI for social media	2012	2013	2014	2015	2016
Small	28%	25%	17%	17%	**21%**
Medium	24%	28%	28%	27%	**27%**
Large	39%	51%	38%	29%	**61%**

How businesses measure social media ROI	Small	Medium	Large
Monitor number of responses on social media	43%	68%	71%
Asking customers how they found you	44%	19%	25%
Third party statistics provider	10%	9%	25%
New sales	32%	24%	19%
Online, automated and analytical tools	18%	51%	46%
Specific deals for social media customers	9%	11%	27%
Saving a customer	0%	7%	10%

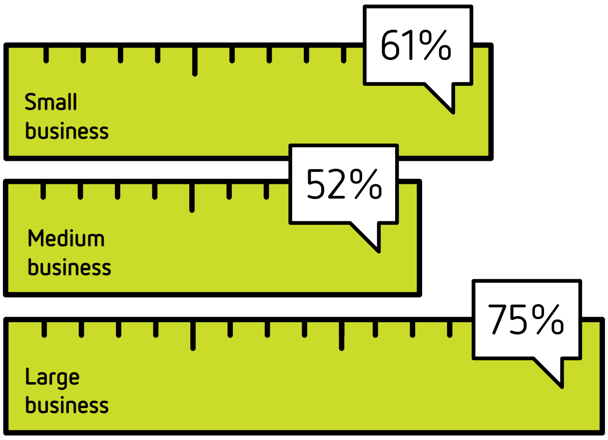
Base: Measures social media ROI: Small: n=95. Medium: n= 16. Large: n=48*
Q11a. How do you measure the return on investment from social media...?
*Note: *Small sample size for medium business sample*

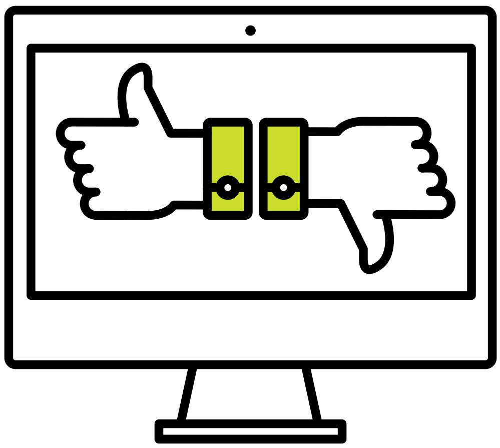
How businesses measure success of their social media investment

Return on social media investment	Small	Medium	Large
Have not yet recovered investment	24%	13%	0%
Under 5%	11%	24%	4%
6% to 10%	8%	8%	8%
11% to 20%	4%	0%	6%
21% to 50%	9%	0%	13%
Over 50%	14%	7%	31%
Don't know	30%	48%	38%
Average	28%	13%	40%

Base: Measures social media ROI: Small: n=95. Medium: n= 16. Large: n=48*
Q11b. And what do you estimate the return on your investment in social media has been...?
*Note: *Small sample size for medium business sample. Rounding occurs*

Measure by number of likes, followers and subscribers



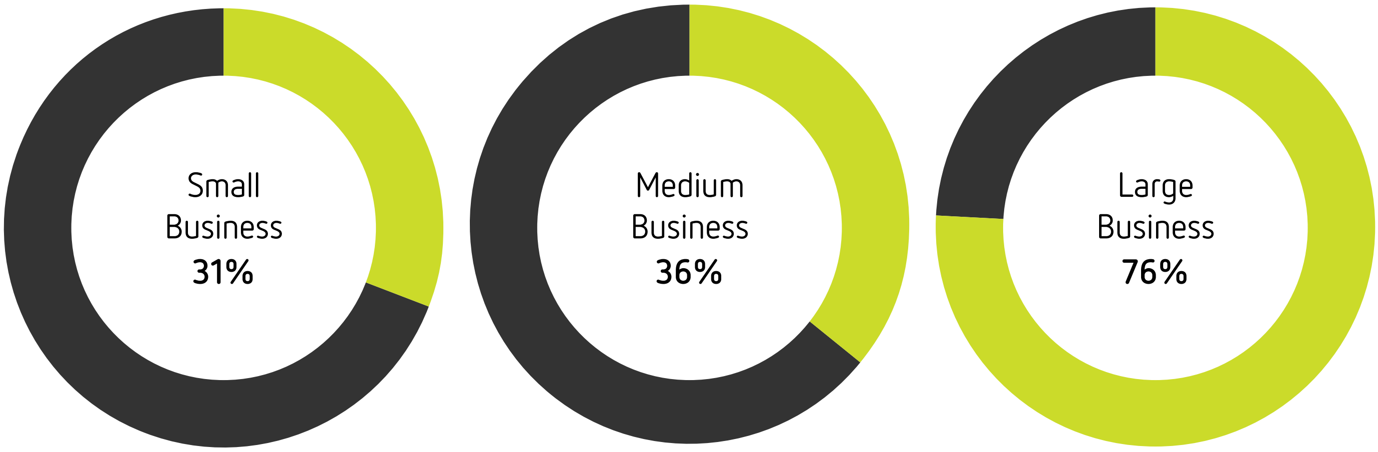


How businesses measure the success of their social media investment	Small	Medium	Large
Number of likes, followers and subscribers	61%	52%	75%
Sales, revenue and profits	42%	45%	29%
Positive conversations on social media	19%	2%	33%
Usage	4%	27%	19%
Klout score	0%	20%	4%
Take up of incentives and offers	15%	20%	21%
Brand sentiment	0%	8%	4%

Base: Measures social media ROI: Small: n=95. Medium: n= 16. Large: n=48*
Q11c. And what do you estimate the return on your investment in social media has been...?
*Note: *Small sample size for Medium business sample. Rounding occurs*

Do businesses have a strategic plan for social media?

While there has been an improvement in the number of small businesses with a social media strategy (up from 19% to 31%), three quarters of large businesses have a strategy.



Businesses with a strategic plan for social media	2015	2016
Small	19%	31%
Medium	39%	36%
Large	63%	76%

Base: All businesses with a social media presence or planning on getting one in the next 12 months: Small n=510. Medium: n=61. Large: n=85
QB19. And have you developed a strategic plan in your business for your social media?

Expectations for the next 12 months

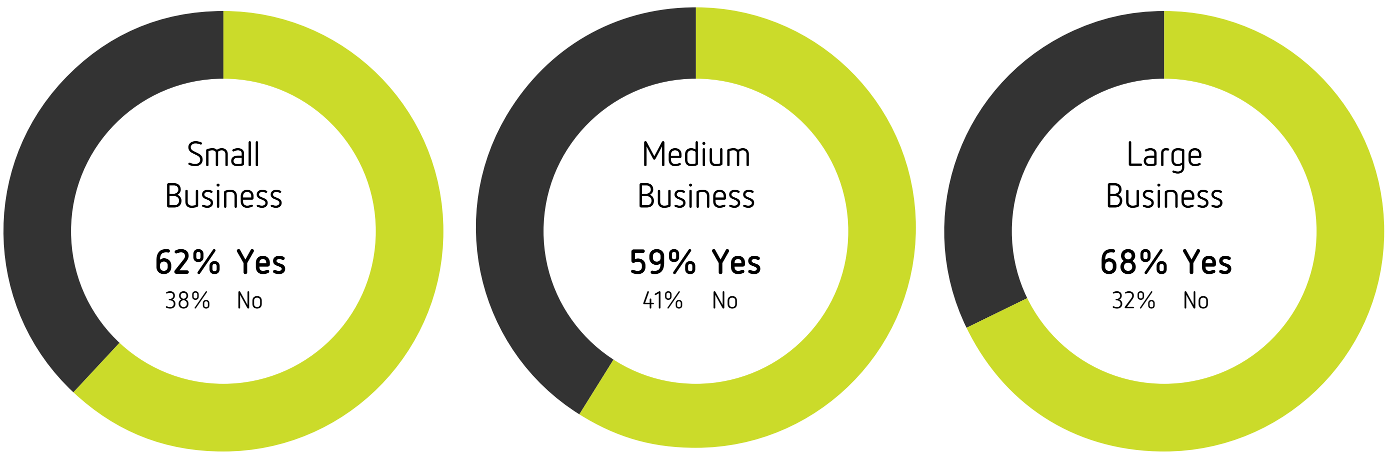
Very few businesses expect to spend less on social media in the year ahead and the net balances recorded on this measure are positive for businesses of all sizes.

62% 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	29%	28%	49%
Spend the same	52%	69%	39%
Spend less	6%	1%	1%
Net Balance*	**+23**	**+27**	**+48**
Don't know or refused	13%	2%	10%

Base: All businesses with a social media presence: Small: n=434. Medium: n= 53. Large: n=79
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	2016
Small	16.6%	12.2%	18.0%	15.3%	**15.7%**
Medium	5.8%	11.7%	5.9%	10.4%	**8.5%**
Large	8.4%	8.8%	8.7%	9.1%	**29.9%**

Base: All businesses with a social media presence: Small: n=510. Medium: n= 61. Large: n=85
QB13. Do you believe that your social media investment will contribute to an increase in sales in the next 12 months?
QB14. If yes, by approximately how much?

About Sensis

As Australia's #1 marketing services company, our purpose is to engage consumers with Australian businesses. We make this happen through a number of leading brands – Yellow Pages, White Pages, True Local, 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.

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