



Social media: bringing people together?

YouGov analysis of social media habits, how it varies by platform, and how marketers use it for business

**SOCIAL
MEDIA
WEEK**

YouGov[®]
What the world thinks

Contents

- ▶ Introduction 3
- ▶ Which social media platforms are most popular? 4
- ▶ Profiles of daily social media users..... 6
- ▶ Does social media bring people together?..... 9
- ▶ Loneliness and social media.....11
- ▶ Spotlight on Instagram..... 13
- ▶ How important is social media for businesses? 16
- ▶ Conclusion..... 21
- ▶ About the data22

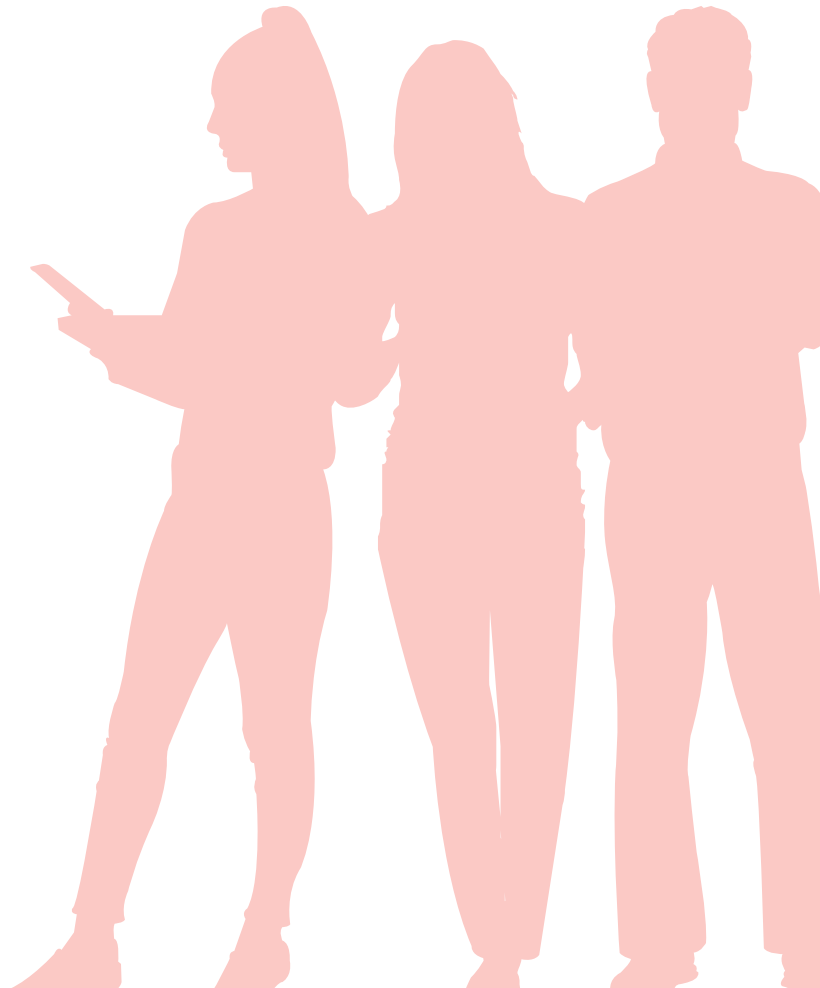
Introduction

There are 40.7 million social media users in the UK aged 18 and over — equalling 80% of the total adult population — so it's vital to understand changing patterns of use over time and across platforms.

This paper, conducted in partnership with Social Media Week, shows which platforms are most popular, with whom, and what they're being used for. The data also strips away the controversy around whether social networks bring people together or isolate them.

It also looks at how marketers use social media for their business and how important they perceive it to be.

The data in this report is taken from our audience segmentation and brand tracking tools [Profiles](#) and [BrandIndex](#), as well as our fast turnaround [Omnibus](#) research service, with added insights from our [custom research](#) experts.



Which social media platforms are most popular?

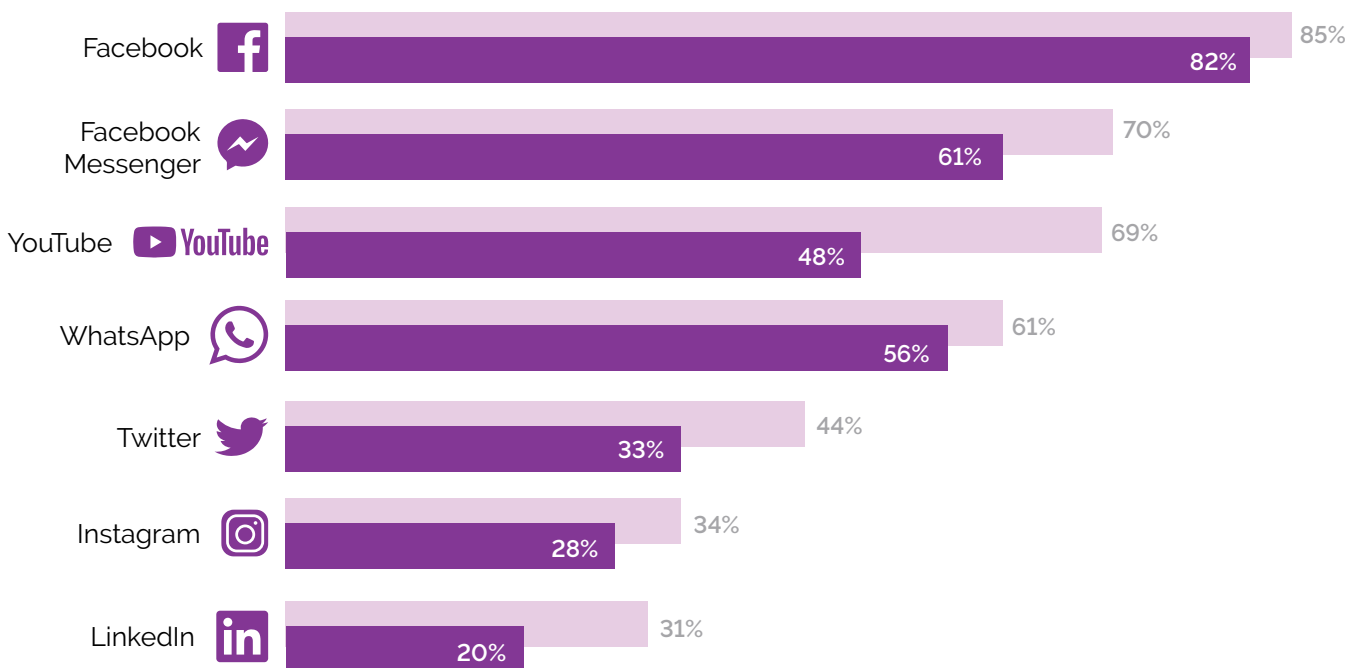
Unsurprisingly, Facebook dominates in terms of both the number of people who have access to the site and actual users. Communication services such as Facebook Messenger and WhatsApp also have high levels of usage.

Services where there is a significant difference between access and usage include Google+ (which recently announced it is shutting down following a data breach) and Skype.

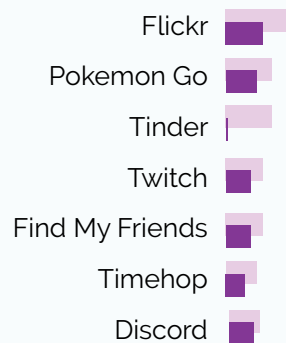
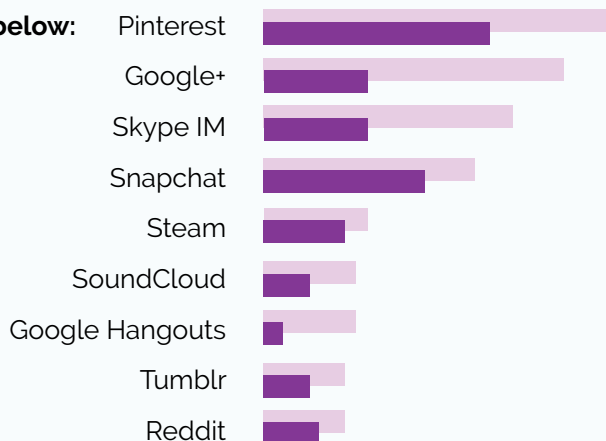
Facebook and Facebook Messenger are the most used communication services

■ Access
■ Use

Which, if any, of the following services do you have access to? And which, if any, of the following services do you currently use?



30% or below:



1% or below: Periscope, Grindr, Roblox, Myspace, BBM, Conversations, Whisper

Please note this research was conducted before Google+ announced its closure in October 2018.

Which social media platforms are most popular?

Which social media services are seen as essential?

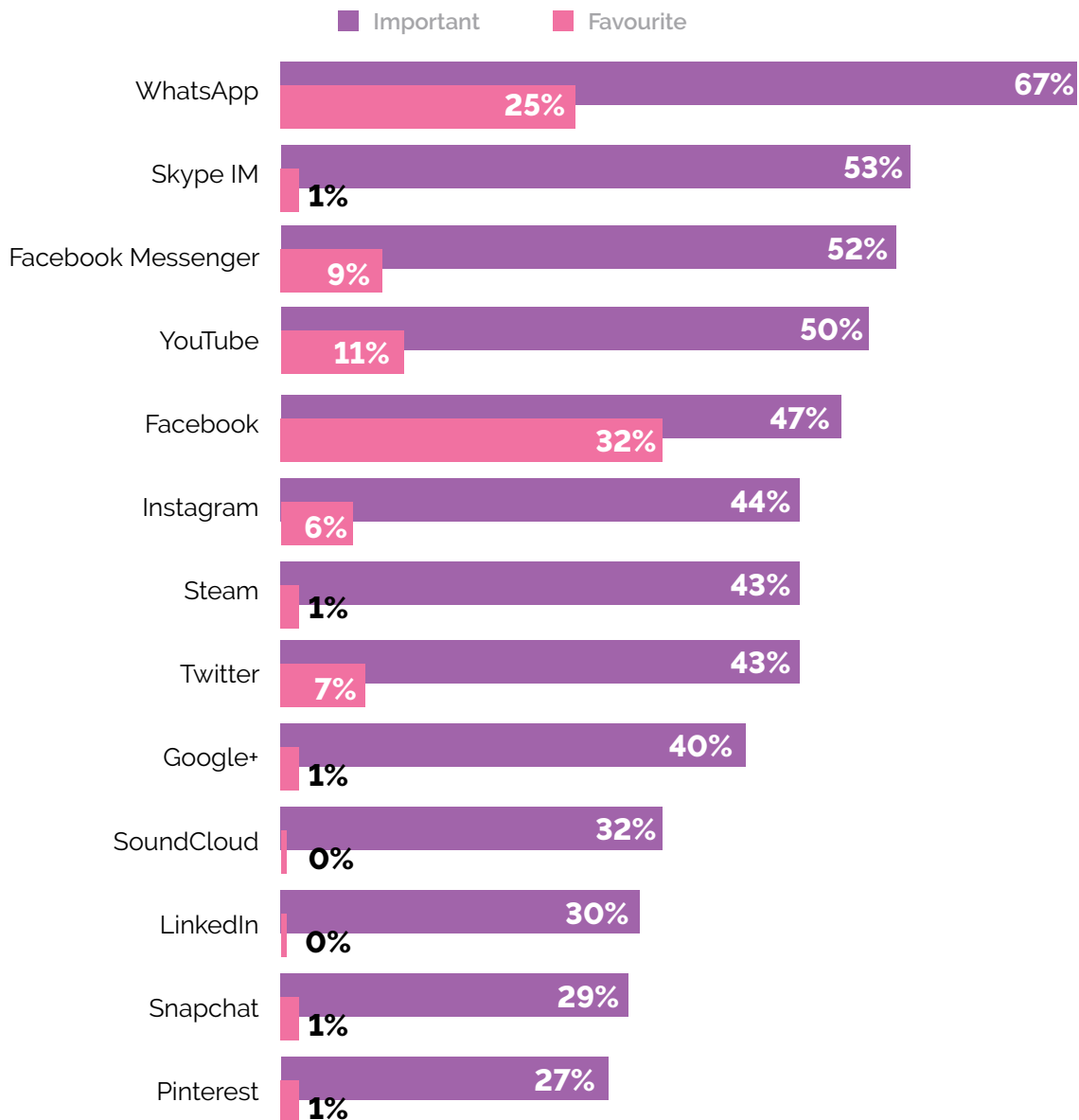
More than two thirds (67%) of people say that WhatsApp is important to them, more than any other social media service. A quarter of WhatsApp users also say it's their favourite service.

Skype is seen as important by more than half (53%) of respondents but is the favourite of only 1%. This could be down to commonplace use in the workplace, but it having little place in people's personal lives.

Facebook has more people who say it is their favourite platform (32%) than any other, while LinkedIn is seen as important by three in ten (30%) but not cited as a favourite by anyone - again perhaps because it's related to work.

More than two thirds of people say WhatsApp is important to them

How important or unimportant are each of the following social media services/apps in your life?



Please note this research was conducted before Google+ announced its closure in October 2018.

Profiles of daily social media users

With 64% of the nation saying they log in to the site daily, Facebook dominates the social media landscape.

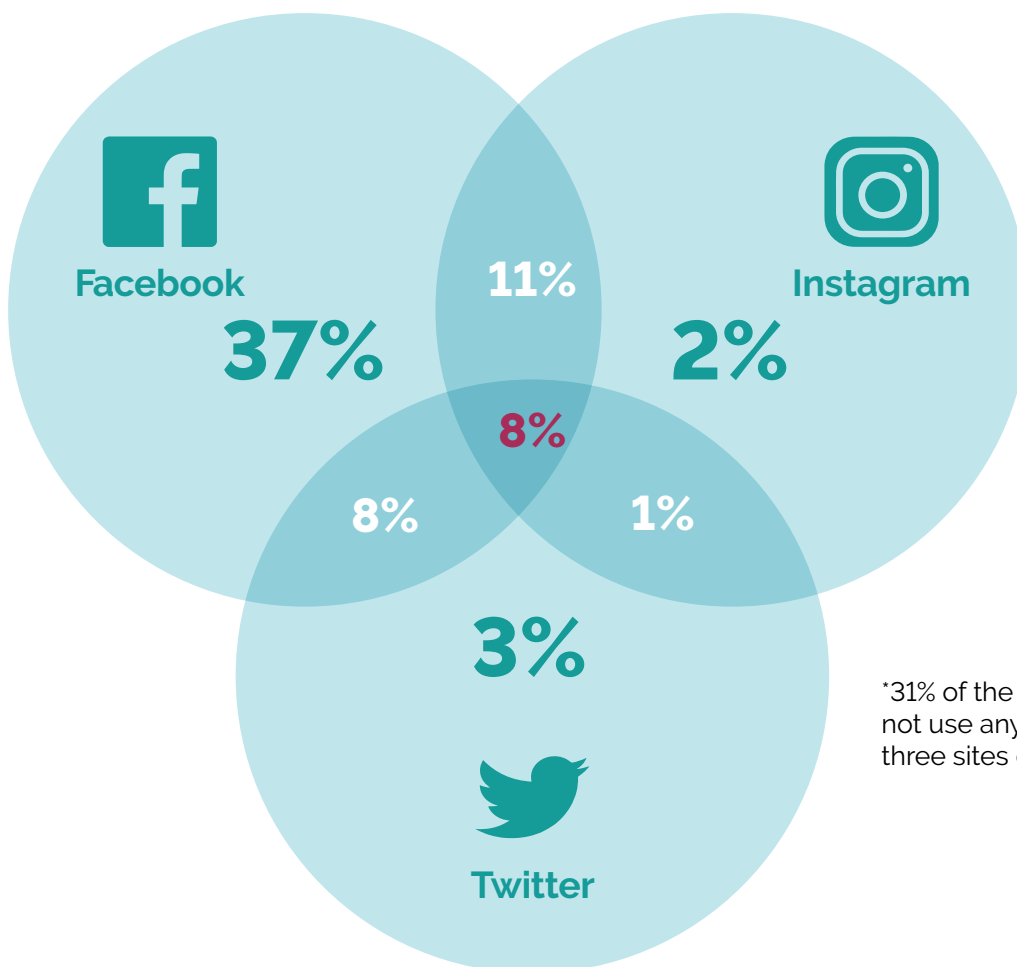
The second most popular – Instagram – is some way behind on 22%.

This section looks at frequency of use among daily users for three of the largest social networks – Facebook, Instagram and Twitter, as well as crossover.

We also explore the profile of those who use the sites every day.

Eight per cent of people use Facebook, Instagram and Twitter every day

Users who log in daily nat rep %



*31% of the nation do not use any of these three sites daily

Profiles of daily social media users

Facebook

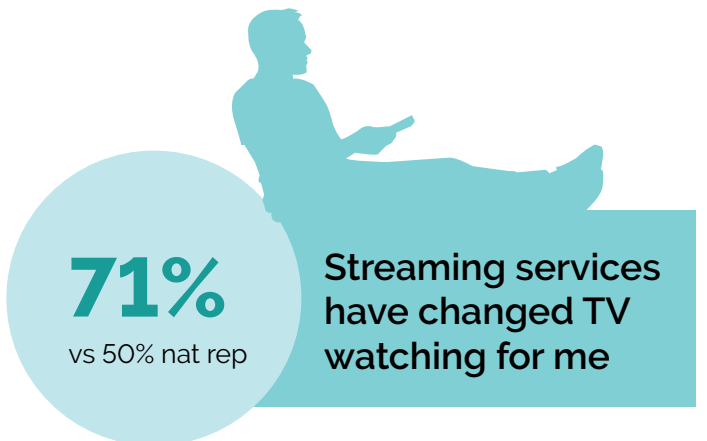
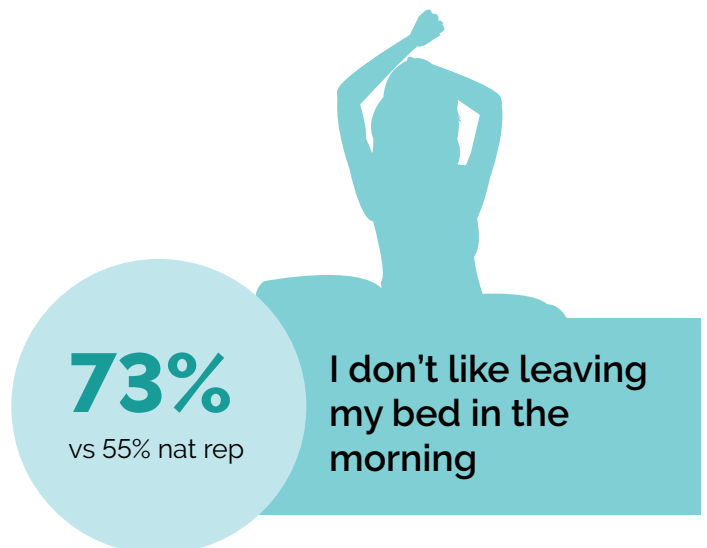
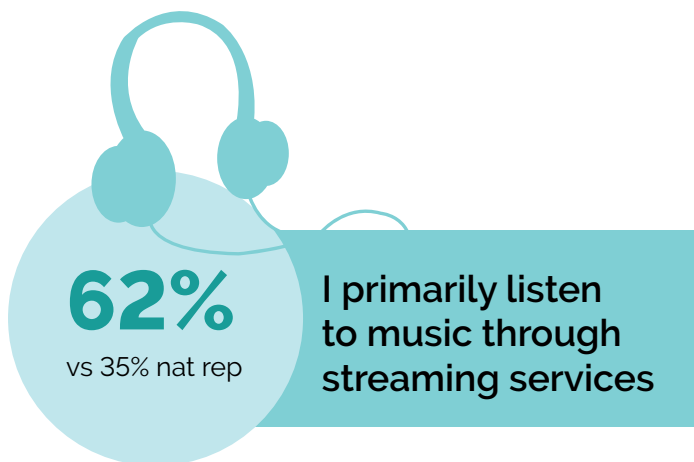
Almost two thirds of people (64%) use Facebook daily, and a quarter (26%) of these claim to post every day. Six per cent log on daily but never post.

The most popular Facebook pages among these avid users are: amazon.co.uk, LADbible, Facebook, as well as Lidl UK and Aldi UK.

Instagram

More than one in five (22%) Brits use Instagram daily. Three in five (60%) of these are millennials (vs 31% nat rep) and they are also more likely to be a student (13% vs 5% nat rep).

In terms of their personality, they are more likely than the general public to agree with the following statements:



Profiles of daily social media users

Twitter

Daily Twitter users (20% of the nation) are also more likely to be millennials (41% vs 31% nat rep). They are likely to be working full time (53% vs 43% nat rep) and to not have children (52% vs 40% nat rep).

A quarter (26%) post daily and they are more likely to have the following attitudes to media:

52%
vs 36% nat rep

I primarily listen to music through streaming services

64%
vs 50% nat rep

I'm happy to spend money to support my favourite music artists



81%
vs 70% nat rep

Super-fast broadband is important to me

65%
vs 50% nat rep

Streaming services have changed TV watching for me



43%
vs 30% nat rep

I waste time on the internet at work



In terms of how all three of these groups access social media, the overwhelming majority use their smartphone:



93%

Instagram



85%

Twitter



80%









Facebook

This snapshot represents just a small fraction of the data YouGov has on these profiles of social media users.

Does social media bring people together?

While some platforms are mainly used for keeping in touch with family and friends, others are seen as tools for keeping up with news or sharing content.

Top three reasons for using each social network (among users)

	To keep in contact with friends	84%
	To keep in contact with family	65%
	Share things I find interesting or entertaining, <i>e.g. articles, videos, etc</i>	53%
	Keep up to date with the news	58%
	Follow interesting people/industry experts	41%
	Keep up to date with celebrities I like	30%
	Networking with people/building my network	53%
	To look/apply for jobs	52%
	Follow interesting people/industry experts	34%
	Keep up to date with the news	31%
	Looking at or watching fun/entertaining content	18%
	To look/apply for jobs	16%
	Share things I find interesting or entertaining, <i>e.g. articles, videos, etc</i>	30%
	Looking at or watching fun/entertaining content	26%
	Follow interesting people/industry experts	16%
	Share things I find interesting or entertaining, <i>e.g. articles, videos, etc</i>	39%
	Looking at or watching fun/entertaining content	30%
	Share my own opinions	19%
	To keep in contact with friends	46%
	Keep up to date with celebrities I like	39%
	Share the things that I am doing	38%
	To keep in contact with friends	58%
	Share the things that I am doing	37%
	Looking at or watching fun/entertaining content	29%

Does social media bring people together?

Does social media aid “real life” social experiences?

Despite fears that spending too much time online (on social media and more generally) stops people from engaging in “real life”, one of the top reasons people give for using many sites – particularly Facebook, Instagram, and Snapchat – is to keep in touch with friends and family.

In fact, 26% of Facebook users say they are using the site more than they were a year ago and this is predominantly because their friends and family are using it more. Seven in ten (69%) gave this as a reason for their increased engagement with the site. This is good news for Facebook which is actively moving back to its roots and focusing on connecting people with people rather than businesses.

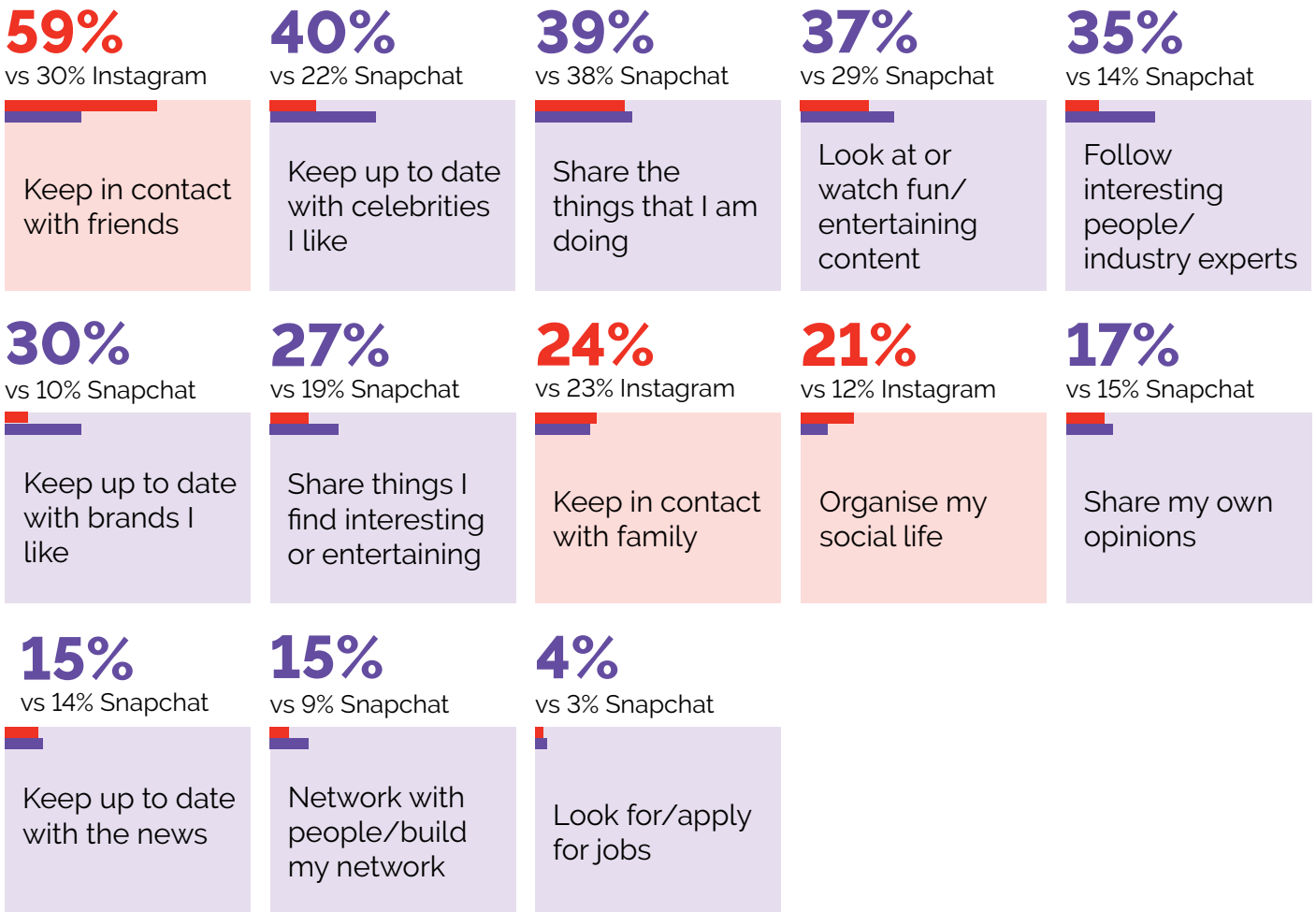
Much of this growth is among older generations (51% of those reporting increased use of Facebook are over 55) but younger people are also keeping in touch through social media.

A fifth (21%) of Snapchat users say they use it to organise their social life and one in ten (11%) Instagram users report the same. But both of these trail the 56% of 18-year-old Snapchat users who use the platform for the same reason.

Reasons for using these sites

Snapchat and Instagram help young people organise their social lives

■ Snapchat users ■ Instagram users



Loneliness and social media

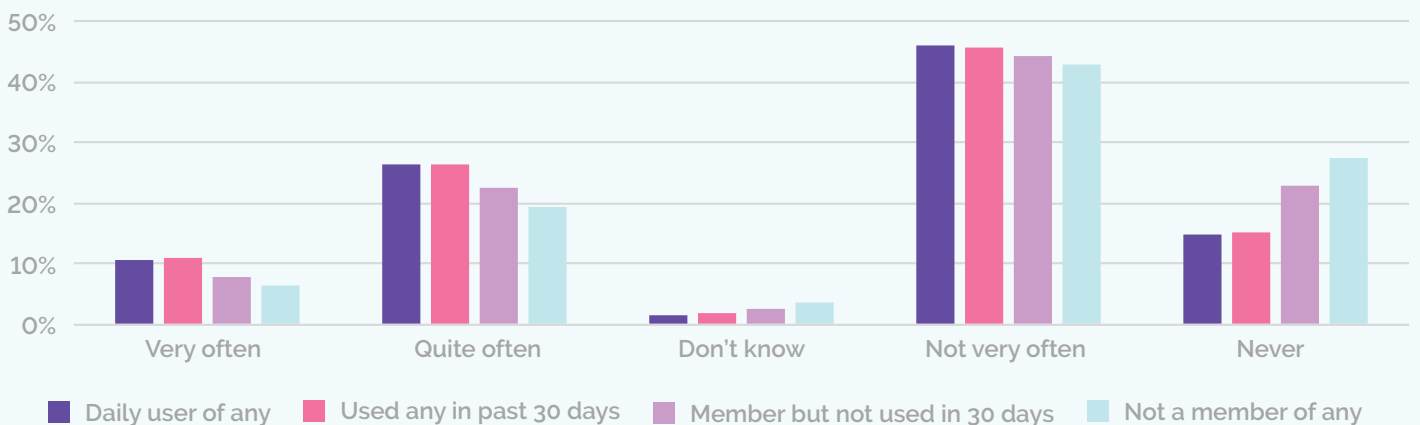
While certain sites help people stay in touch with friends and family, it has been suggested that social media actually isolates us and causes loneliness.

However, our data indicates that this is not necessarily the case.

Although those who use social media sites regularly are slightly more likely to say they often feel lonely, they are also more likely to say they **don't** feel lonely very often.

However, those who are not members of any social media site are **much** more likely to say that they never feel lonely.

How often do you feel lonely?



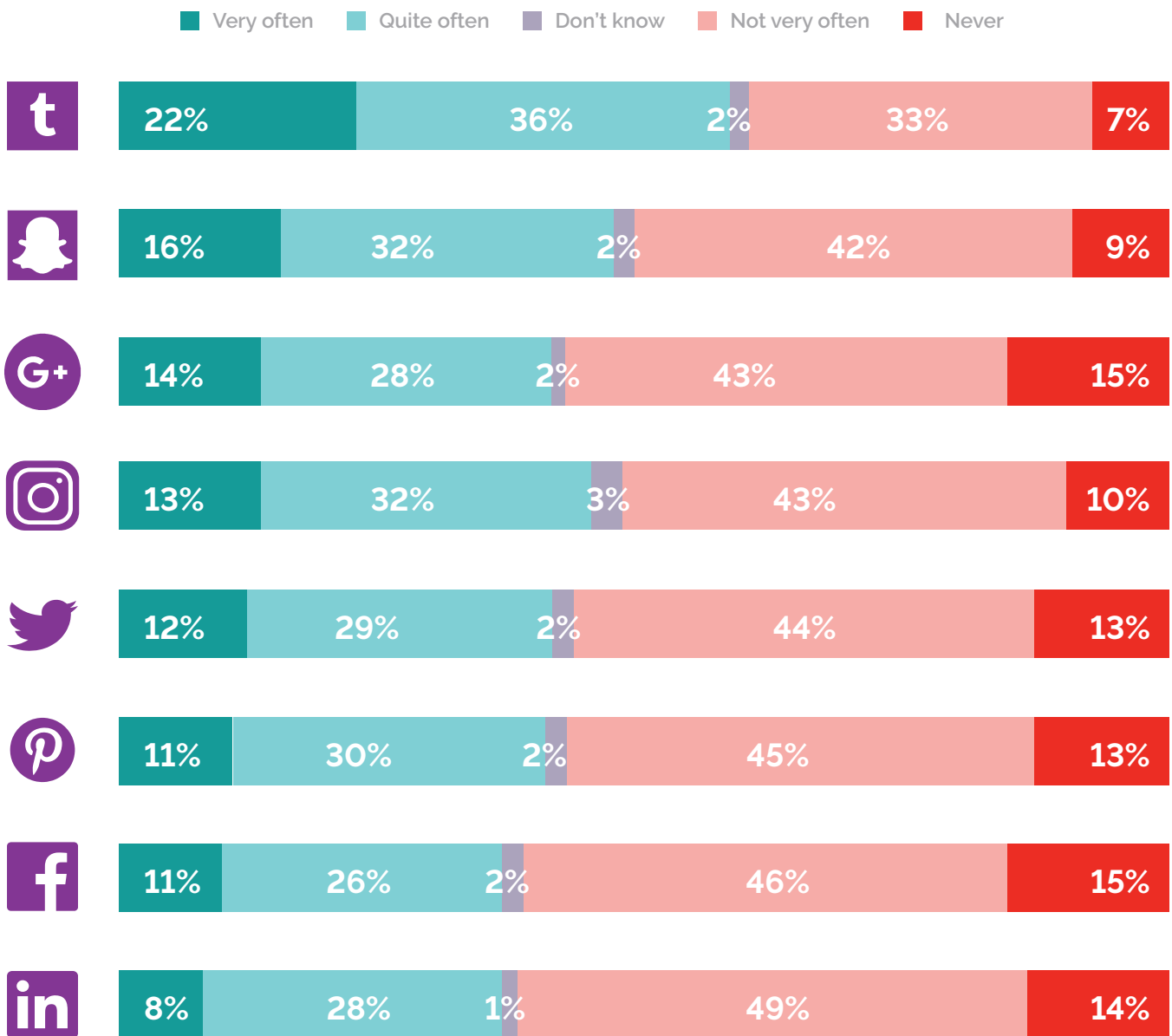
Are users of certain social media sites more likely to be lonely?

Beyond an overarching connection between social media and loneliness, we also looked at whether certain social media sites are more likely to have users who say they often feel lonely.

The data showed that Tumblr users are most likely to say they feel lonely very, or quite, often.

LinkedIn users are least likely to be lonely

How often do you feel lonely...all members of each platform





Spotlight on Instagram

In terms of user engagement, Instagram is going from strength to strength, with almost half (48%) of its users saying they are using the site more than they were a year ago.

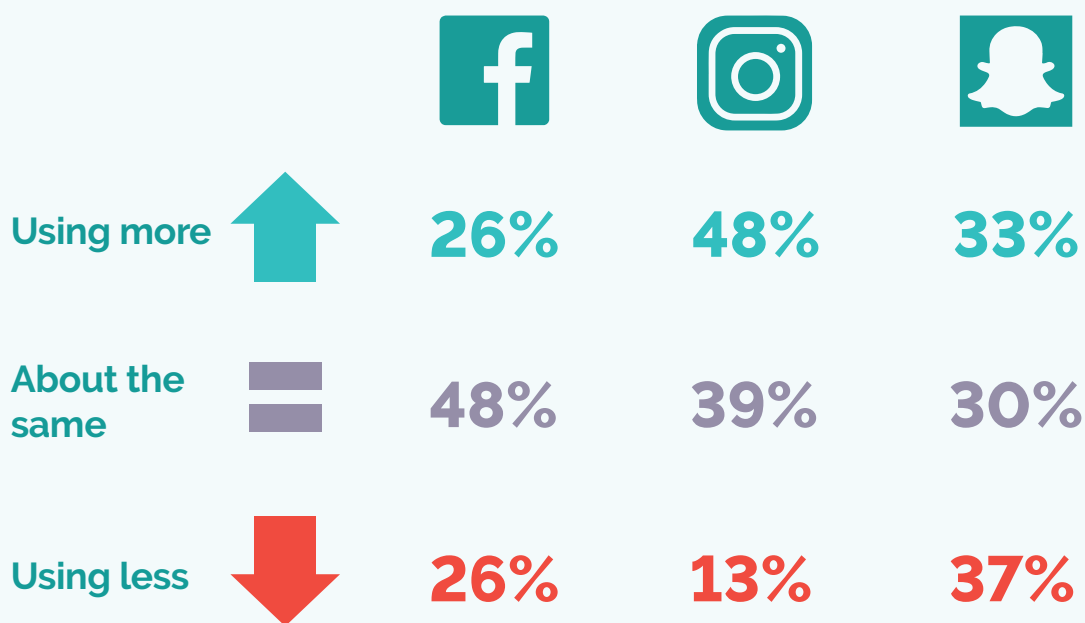
Popular updates bringing new features are likely to have increased engagement. Instagram's focus on an easy-to-use mobile interface could also explain a lot of its appeal.

Facebook, which owns Instagram, is breaking about even with just over a quarter (26%) saying they use it more and the same number using it less.

Meanwhile, almost four in ten (37%) Snapchat users are using the platform less than they were a year ago. This could be related to a widely-reported public denouncement from Kylie Jenner in February 2018, as well as a redesign which many users found "annoying".

Only 13% of Instagram users say they are using the site less than a year ago

How has usage of social media services changed in the past 12 months?



Instagram users and advertising

As engagement with Instagram grows, how can brands reach this captive audience in a natural and appealing way? We looked at how Instagram users engage with the platform and their attitudes to advertising.

They like to scroll



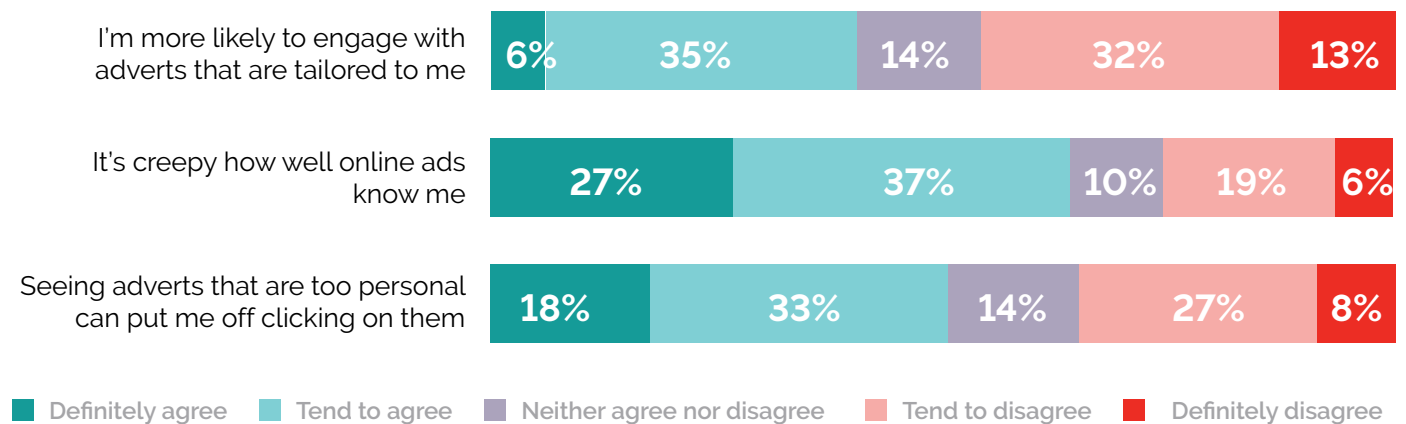
"I often scroll aimlessly through my feed"

4 out of 5 active users

vs 62% of all social media users

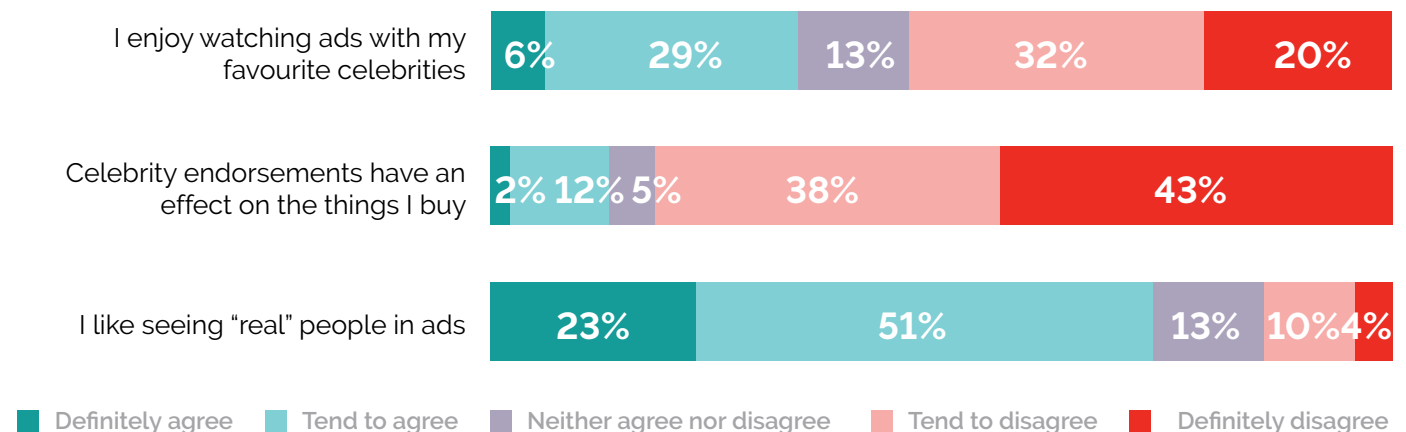
They're divided on personalisation

Instagram users agree that they are more likely to engage with adverts that are tailored to them, but a large number find it "creepy" that advertisers know them so well. And they also report that ads which are too personal can actually put them off clicking.



They prefer real people to celebrities in ads

Brands should take note of the backlash against "staged" images; Instagram users like to see "real-looking" people in ads.



Profile of Instagram brand-lovers

A significant group of Instagram users say they enjoy engaging with brands on Instagram. Almost three in ten (30%) say they specifically use the service to keep up to date with brands they like. This group also enjoys using Instagram in different ways to users overall...

How people who like to keep up to date with brands on Instagram differ from all Instagram members generally

81%

vs 35% all users

Keep up to date with celebrities I like

65%

vs 30% all users

Follow interesting people/industry experts

64%

vs 34% all users

Share the things that I am doing

63%

vs 32% all users

Look at or watch fun/entertaining content

60%

vs 41% all users

Keep in contact with friends



This group skews towards young women...

22%

vs 13% all users

Female aged 18-24

26%

vs 16% all users

Female aged 25-34

Purchasing preferences

They are more likely to be fans of the following brands...

Customers of

McDonald's
Netflix
Boohoo

Consider buying

ASOS
Boohoo
Missguided

Recommend

ASOS
Kinder Bueno
Nike

They like fashion, and their most influential purchase motivators when it comes to clothes, accessories, or shoes are:



27%

Cheapest prices overall



17%

Best quality products



11%

Best special offers



10%

Most fashionable items



How important is social media for businesses?

As well as consumers, we asked senior marketing decision-makers* how important they thought social media was for their business.

Profile of a senior marketing decision-maker

Demographics

71%

vs 48% nat rep

Male

41%

vs 26% nat rep

Aged 40-54

49%

vs 25% nat rep

Have a child under 18

Work activities

92%

vs 44% nat rep

Work a normal day shift (9-5)

53%

vs 15% nat rep

Pick their own hours

73%

vs 41% nat rep

Work onsite indoors

61%

vs 19% nat rep

Have a high income (£50k+)

48%

vs 19% nat rep

Joined their career field for "the money"

Personal social media membership



65%

vs 26% nat rep



55%

vs 40% nat rep



43%

vs 34% nat rep



27%

vs 21% nat rep



25%

vs 21% nat rep



7%

vs 5% nat rep



81%

vs 79% nat rep



21%

vs 21% nat rep

N/A, not a member of any social networks

5%

vs 11% nat rep

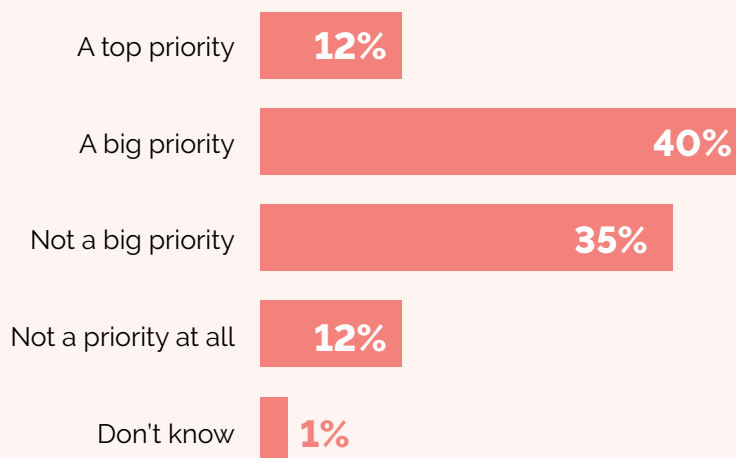
* Defined as senior managers and above who have major marketing decision-making responsibility within their organisation

How important is social media for businesses?

Social media is important ... but marketers don't have time for it

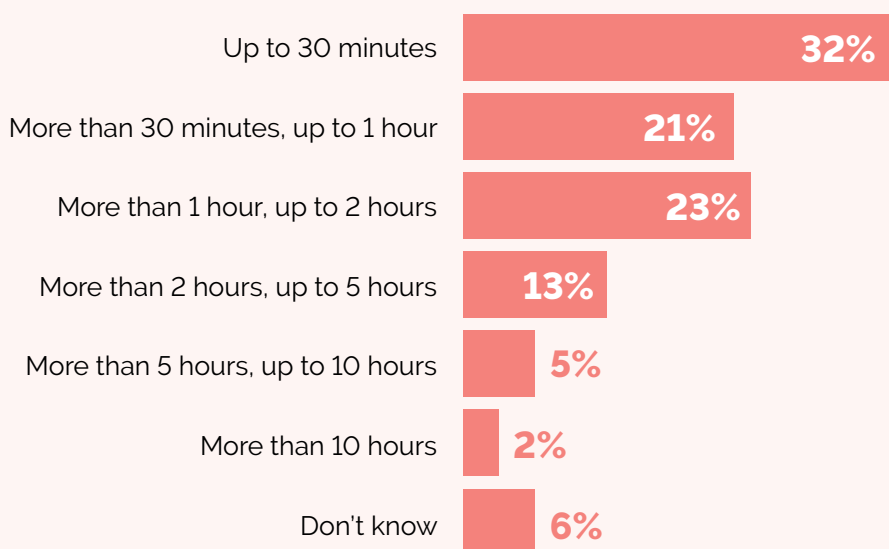
Almost half (48%) of senior marketing decision-makers believe that the importance placed on social media for business marketing purposes is about right, while around a third (36%) think that it's overrated and 10% believe that it's not rated highly enough. In addition, more than half (52%) say it's a big or a top priority for their business.

Compared to other marketing content (e.g. creating email content, adverts etc), how much of a priority, if at all, is social media for your business' marketing?



Despite the value they place upon it, among those who do not have an employee dedicated to social media, over half (53%) spend an hour or less per week on their social media presence.

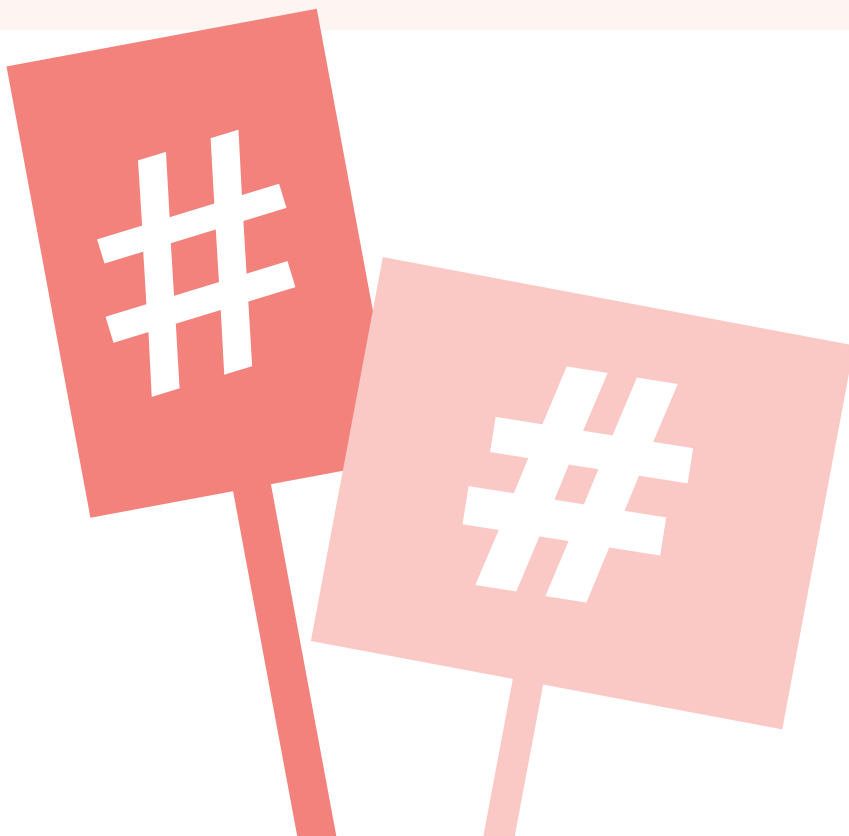
Approximately, how long does your business spend IN TOTAL on social media for marketing purposes in an average week? % those who don't have an employee dedicated to social media



How important is social media for businesses?

Raising awareness is seen as the main draw of social media

In which, if any, of the following ways would you say social media helps your business? (Please select all that apply)



How important is social media for businesses?



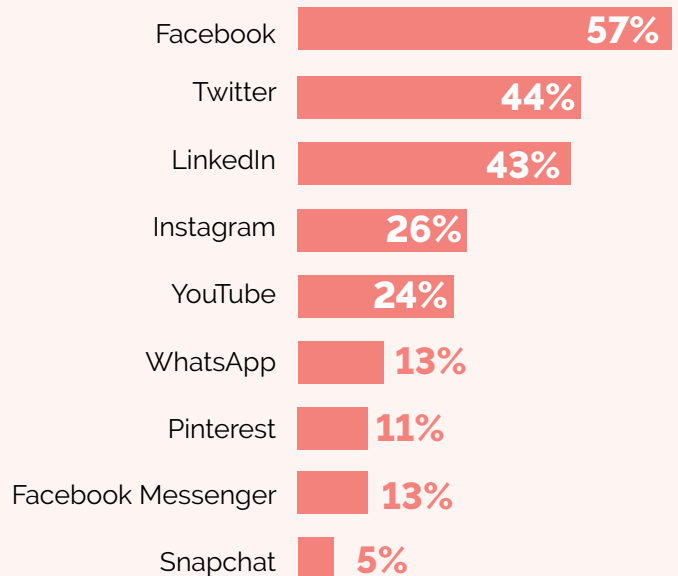
Facebook is most-used site for business marketing

Despite Mark Zuckerberg announcing in January 2018 that Facebook would be prioritising posts by friends and family over those of businesses and publishers, it is still the most used site for marketers.

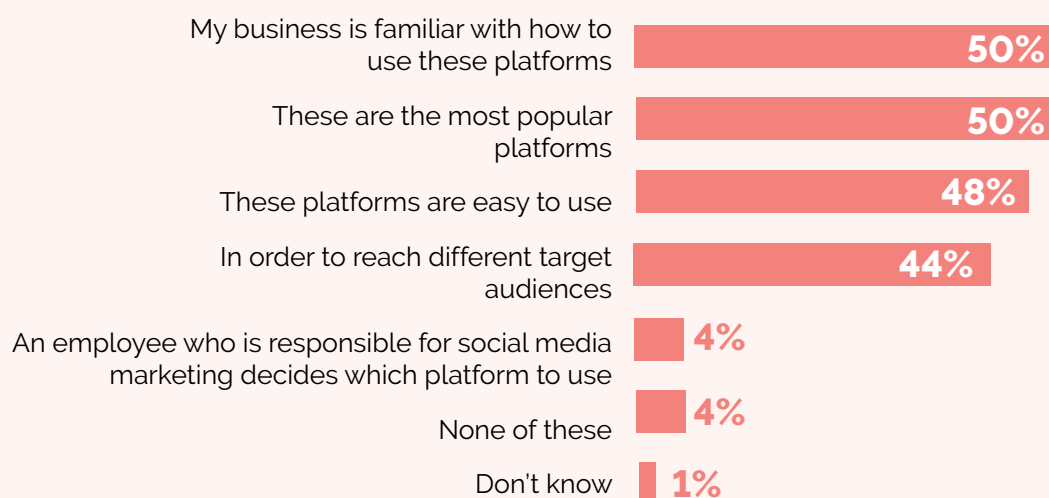
Facebook's influence makes sense given its ubiquity. When asked the reasons for choosing certain platforms, familiarity and overall popularity were the most cited reasons.

Which, if any, of the following social media platforms does your business currently use for marketing purposes?

(Please select all that apply)



Which, if any, of the following are reasons why your business currently uses these platform(s)? (Please select all that apply) % those who use social media for marketing purposes

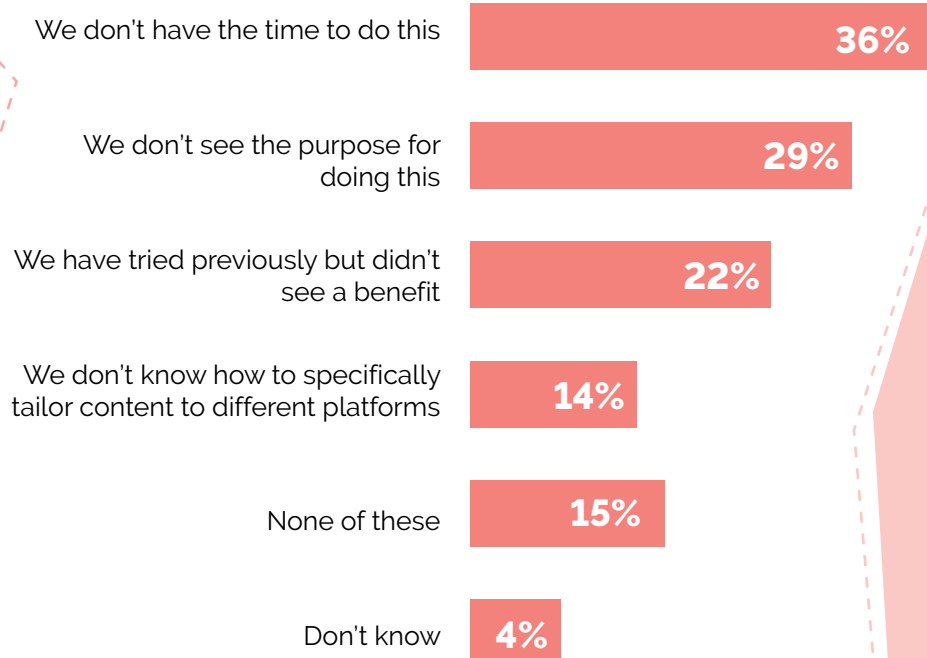


How important is social media for businesses?

Tailoring content: one size fits all?

Twitter and LinkedIn are also popular sites for business marketing, but only a quarter (24%) of marketing decision-makers say they always tailor their content for different platforms. Time is a major factor in why businesses don't always adapt content.

Which, if any, of the following are reasons for not always tailoring your content for different platforms?



It seems that for the most part marketing decision-makers greatly value social media when it comes to raising awareness of their business. However, many don't have the time, resources, or knowledge to embark on a solid strategy and make the most of what social media can offer.

Just under half (43%) believe that social media actively helps their business drive sales so perhaps dedicating greater resource to this activity could be beneficial for businesses in certain industries.

Conclusion

Despite recent negative headlines, Facebook is still the most-used social media network among consumers by far, and remains a favourite for many.

However, Facebook-owned Instagram is making massive strides among younger people – seemingly at the expense of both Facebook and Snapchat.

The data goes some way to alleviate fears that social media is isolating rather than uniting people. Many say that keeping in touch with friends and family is their primary reason for using certain platforms and there does not appear to be a strong link between high social media usage and feeling lonely.

From a business point of view, a large number of senior managers with marketing responsibility believe that social media can be a valuable tool. They also agree that it can bring them closer to their audiences in terms of both engagement and sales.

What's more, as we've seen from the profile of Instagram users, there are many consumers who actively enjoy engaging with brands on social media and so, if they don't already, it can be worthwhile for marketers to invest time in a robust social media presence.

This paper represents a small fraction of the data we hold on social media. Get in touch to find out more.

David Ellis
Director
+44 207 012 6000
david.ellis@yougov.com

About the data

Notes on the data

The data contained in this report is based on responses from YouGov's online panel. As the panel is online, the stats on social media usage are representative of those who are internet users. Around 90% of the population are "recent" internet users and this figure rises to 99% for adults aged 18-34, meaning the data contained within this study is robust.

This white paper does not include social media users under the age of 18.

The tools behind the research

YouGov Plan & Track

YouGov's Plan & Track service combines the detailed audience segmentation power of YouGov Profiles with the brand tracking capabilities of YouGov BrandIndex. The segmentations run on data collected in the YouGov Cube. The cube is our connected data vault which holds 230,000 data variables collected from over 300,000 YouGov panellists in the UK.

YouGov Omnibus

YouGov Omnibus provides survey results with answers delivered the next day at a fraction of the cost of an ad-hoc study. Our panellists are fully profiled from household income to health issues to their last major purchase, allowing clients to target just those people they want answers from. We also offer a range of specialist fast turnaround services, from international or generational to children or parents to business to business, and more.

For this study, 508 senior marketing decision-makers were surveyed between 18th – 24th October 2018.

YouGov Custom

YouGov Custom Research engagements leverage cutting-edge research and analytic techniques with an eye for assessing the economic impact of your actions. Our industry experts deliver you crucial insights and tools to plan and make strategic and tactical decisions while maintaining a focus on tangible outcomes. We have expertise across a variety of sectors, including consumer products and retail channels, financial services, luxury goods, technology, education, public policy, and more.

YouGov's Custom Research team interviewed 2,053 social media users in the UK between 24th May and 6th June 2018. The study focused on awareness of social media services, usage of them, and reasons behind usage.

