2015 Mid-South Digital Engagement Survey





Project Background

- In 2011, Obsidian and Research Dynamics came together to conduct the first-ever quantitative survey examining social media usage in the Mid-South.
- That survey, which was landline-based, was repeated in 2012.
- Beginning in 2013 and again in 2014 and 2015, the survey was conducted online and was broader in nature – measuring various types of "digital engagement" among Mid-Southerners, including social media, app and website usage.

Methodology

- On June 22, 2015, area residents were invited to take the 2015 Mid-South Digital Engagement Survey by visiting the website DigitalMidSouth.com.
- Respondents were qualified for participating in this survey by living in a Mid-South county and by participating in digital engagement, such as social media, website or app use.
- By the cutoff date of July 10, 2015, a total of 201 surveys were returned.
- The margin of error for this survey is +/- 7 points, meaning that if all Mid-South residents who participate in digital engagement had completed this survey, in 95 out of 100 cases, the results would differ by no more than 7 points in either direction from the results of the 201 people who participated in this survey.

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

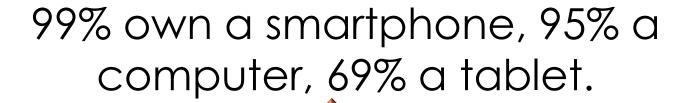


53% visit social media sites more than a few times a day.



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

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



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

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



46% never click through on digital ads.



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

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

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

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

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



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

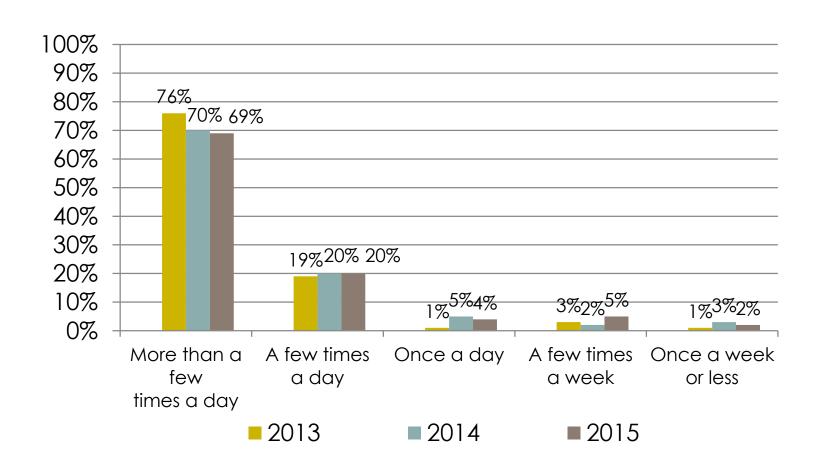


38% stay on a company's website if a company's website isn't mobile-friendly.

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



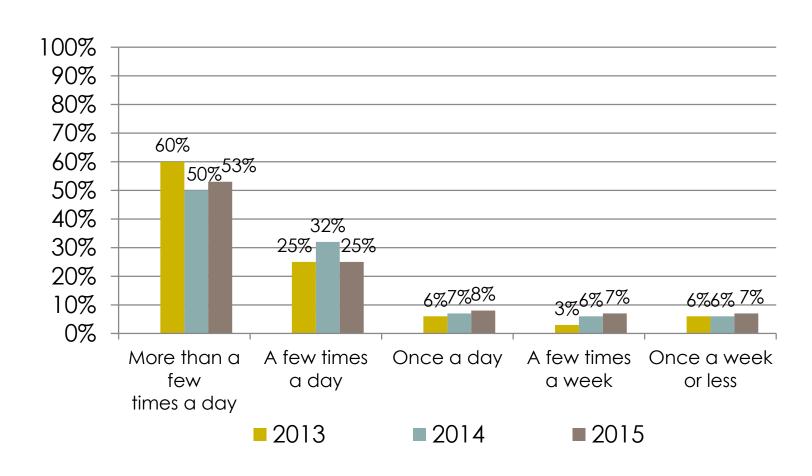
Overall Use Frequency



Overall Use Frequency

- In this 2015 survey, 69% of respondents said they participate in digital engagement (such as social media use, visiting websites or downloading and using apps) more than a few times a day, with only a combined 11% participating once a day or less.
- After decreasing six points from the original 2013 survey to the 2014 survey (76% to 70%), this year's survey saw basically no change in the percentage of those surveyed who reported participating in digital engagement more than a few times a day (69%).

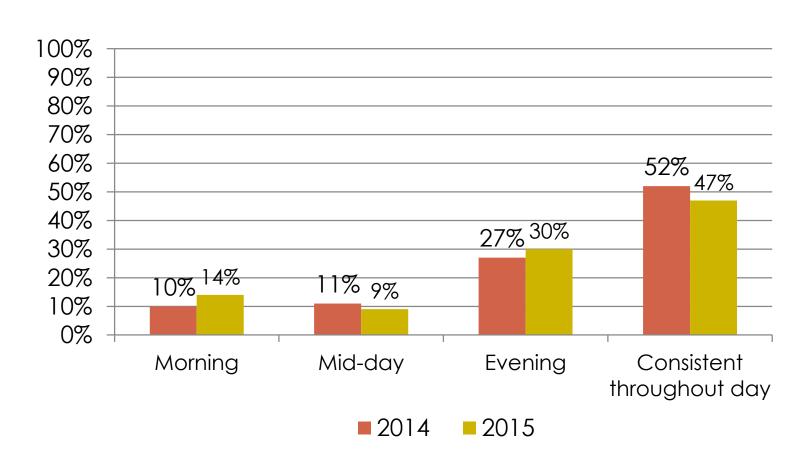
Social Media Frequency



Social Media Frequency

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

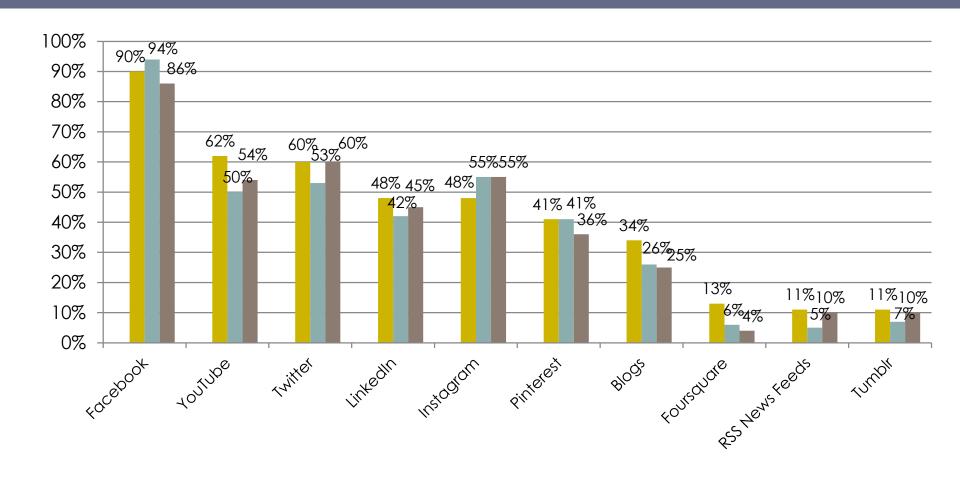
Time Of Day Most Active



Time Of Day Most Active

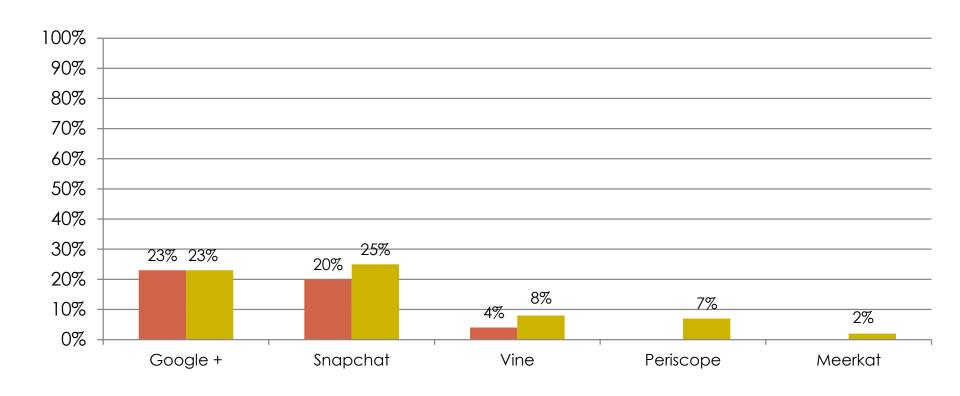
- In this 2015 survey, slightly less than half of those surveyed said they are most active "digitally" consistently throughout the day (47%).
- If most active during a specific time of day, respondents this year were more likely to say they are most active "digitally" during the **evening** (30%), as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

Social Media Sites Used



■ 2013 **■** 2014 **■** 2015

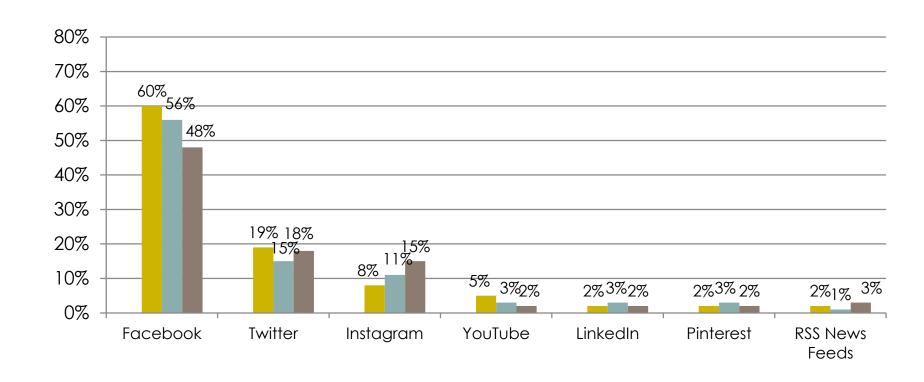
Social Media Sites Used



Social Media Sites Used

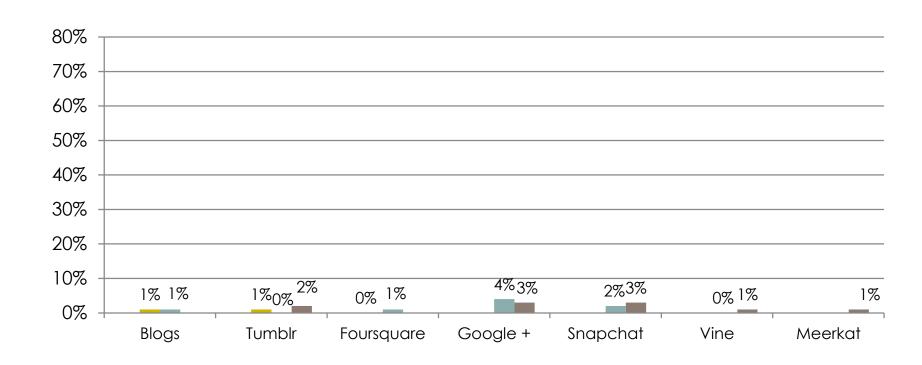
- Of 15 social media platforms respondents were asked to indicate if they
 use on a regular basis, Facebook was named most often in this year's
 survey (86%).
- As far as being the second most-often used platform in this 2015 survey, only six points separated **Twitter** (60%), **Instagram** (55%), and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

Site Most Used



2014 2015

Site Most Used

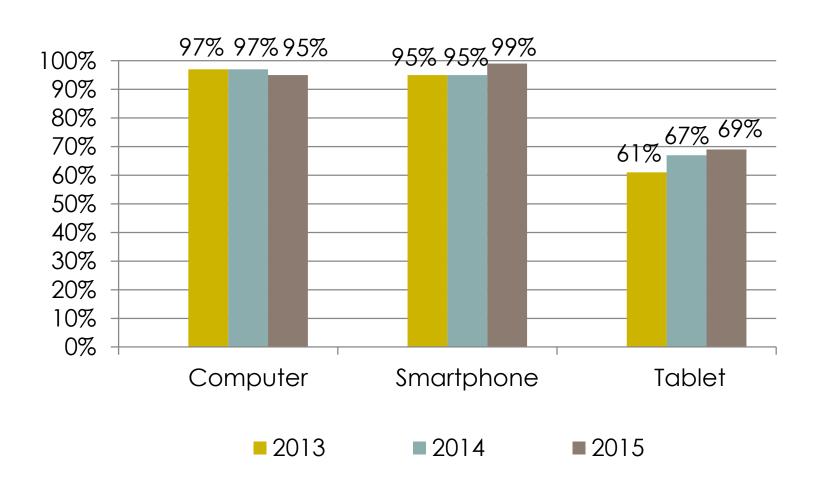


2014 2015

Site Most Used

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

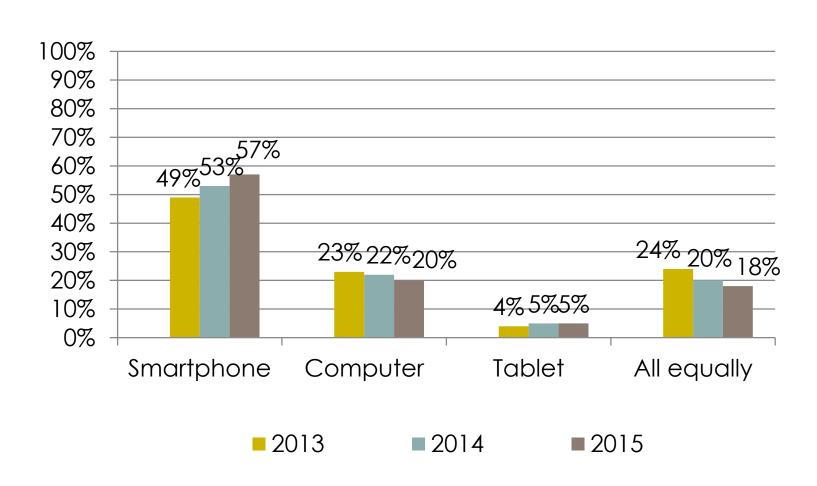
Technology Ownership



Technology Ownership

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

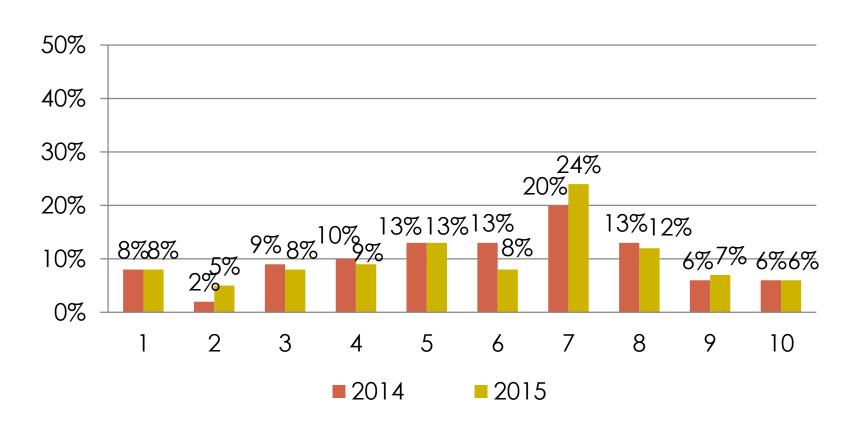
Technology Most Used



Technology Most Used

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

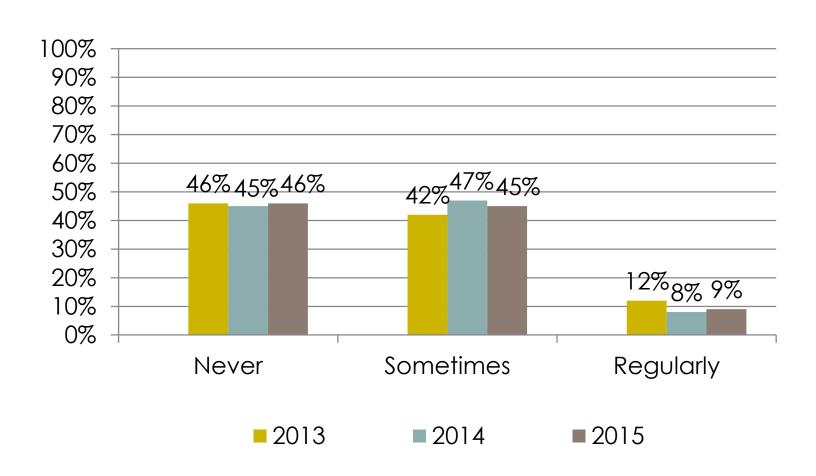
Smartphone "Addiction" Level



Smartphone "Addiction" Level

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

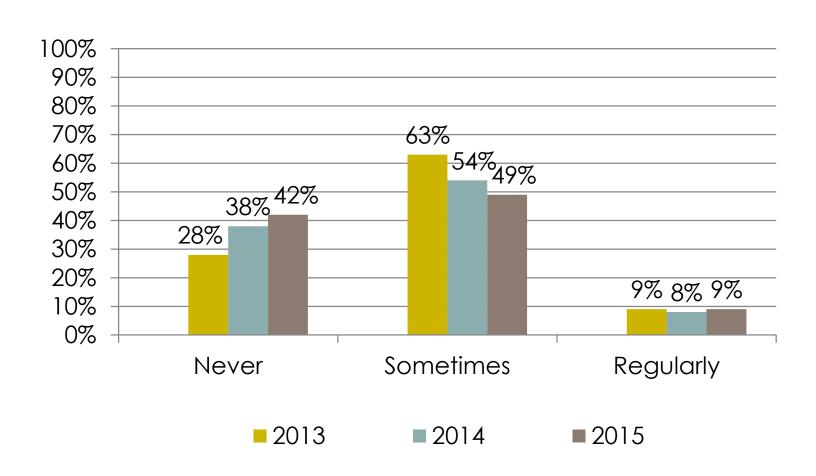
Clicking Digital Ads



Clicking Digital Ads

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

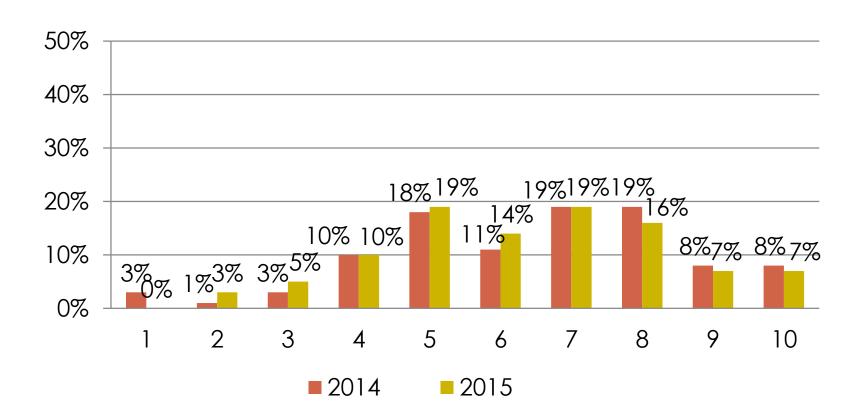
Clicking Links: Promo Emails



Clicking Links: Promo Emails

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

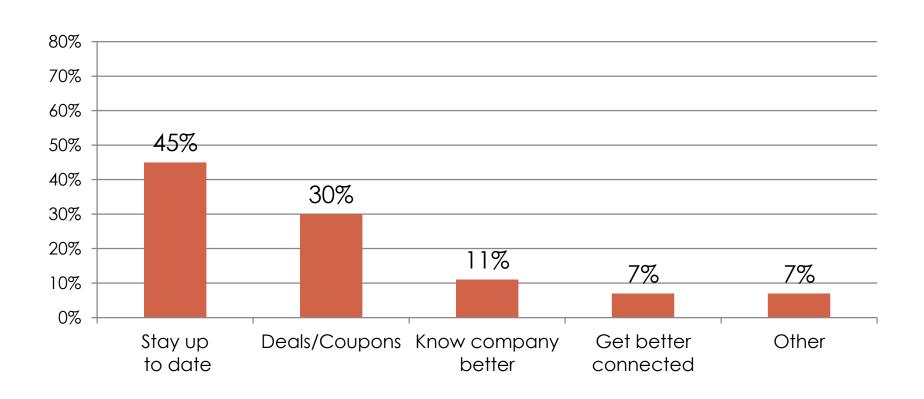
Digital Security Level



Digital Security Level

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

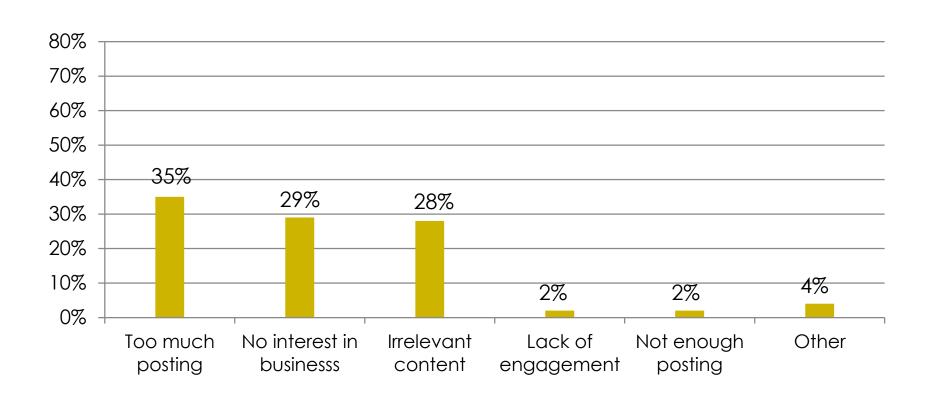
Why Follow A Business



Why Follow A Business

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

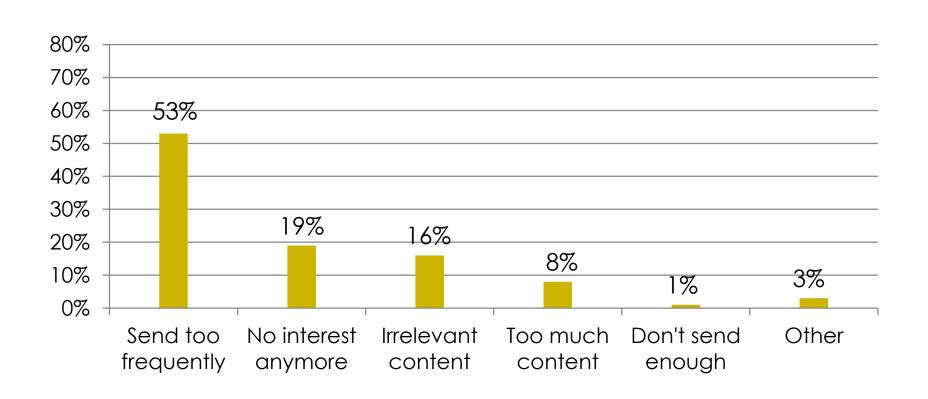
Why Quit Following A Business



Why Quit Following A Business

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

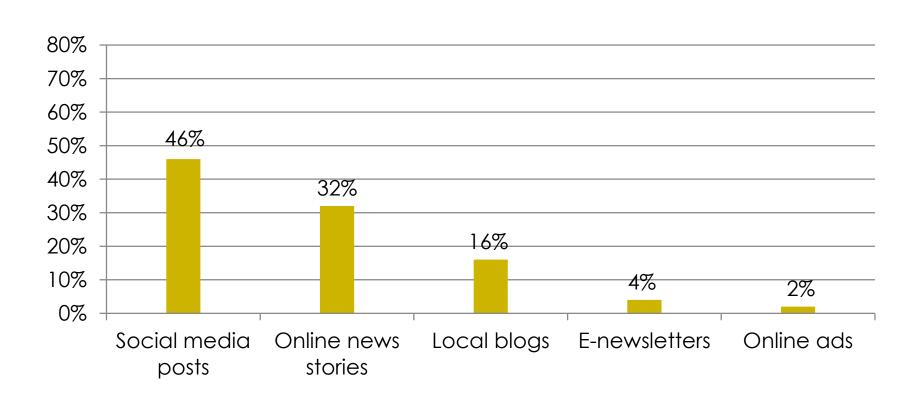
Why Unsubscribe To E-Newsletter



Why Unsubscribe To E-Newsletter

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

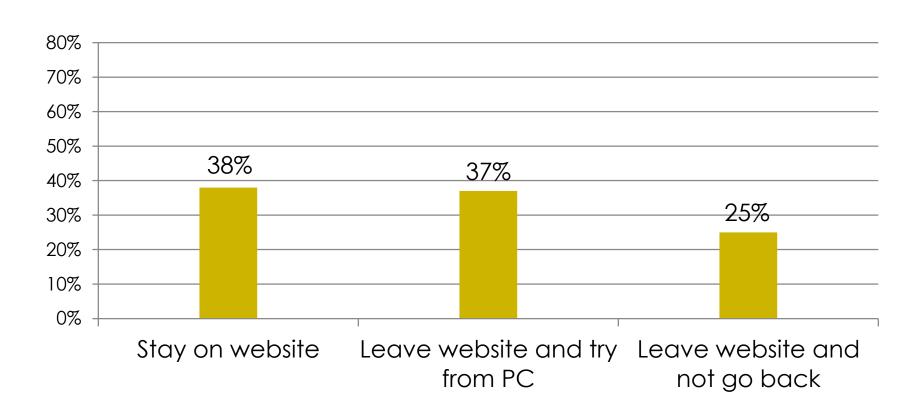
How Find Out What's Going On



How Find Out What's Going On

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

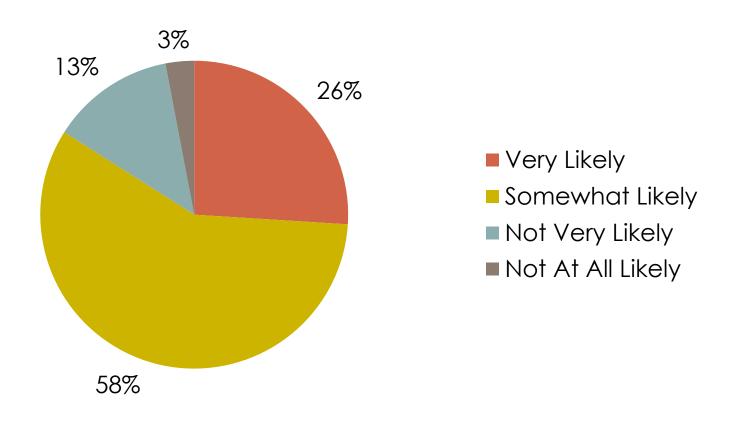
If Website Not Mobile-Friendly



If Website Not Mobile-Friendly

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

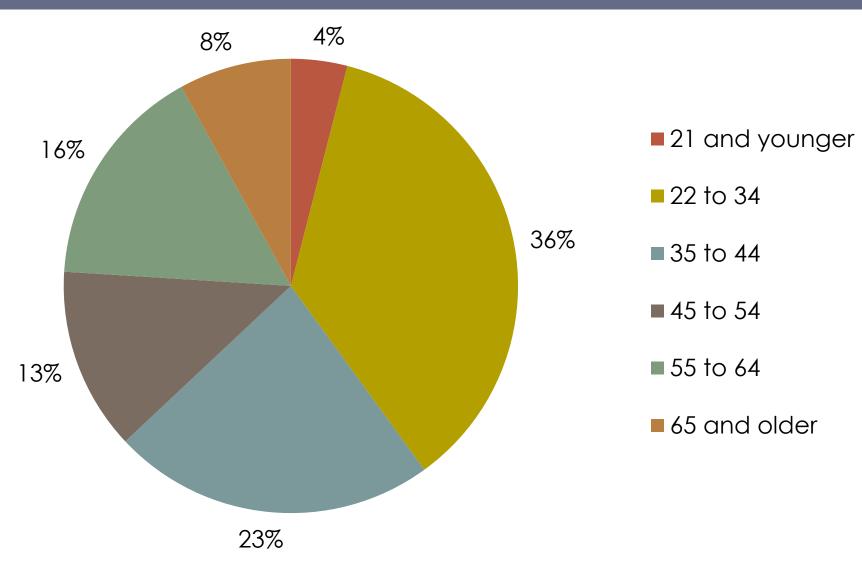
Impact Of Social Media Buzz On Visitation

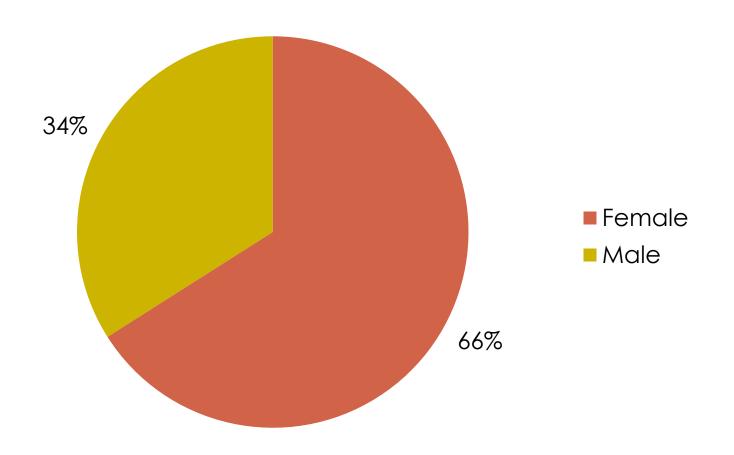


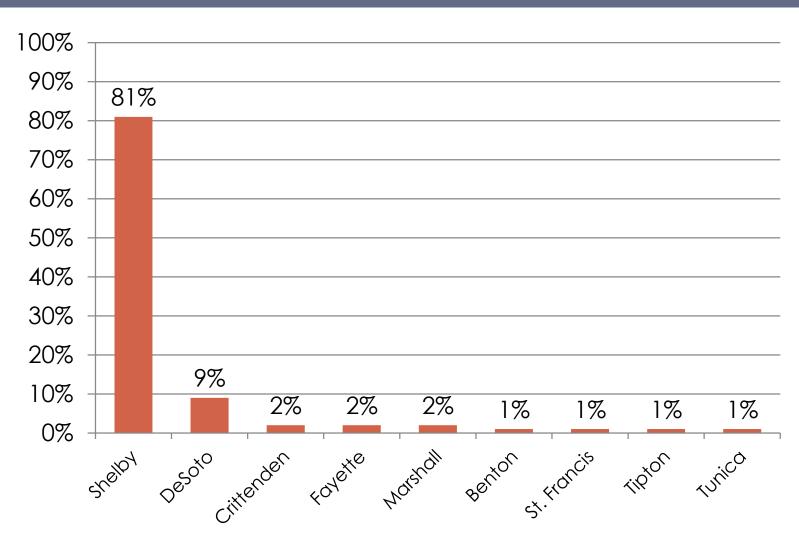
Impact Of Social Media Buzz On Visitation

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

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







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38017 (15% of all respondents)
38103 (13%)
38104 (8%)
38112 (6%)
38119 (6%)
38016 (5%)
38111 (5%)
38120 (5%)
38671 (5%)
38107 (4%)
38117 (3%)
38134 (3%)
38138 (3%)
38018 (2%)
38116 (2%)
38139 (2%)
38654 (2%)
1% or less each: 38002, 38004, 38066, 38114, 38122, 38125, 38133, 38135,
38611, 38637, 38672, 72364.
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Thank you!



