

2013: KEY TRENDS, METRICS & BENCHMARKS
DATA + CONTEXT = INSIGHT



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MAKING SMART DECISIONS

How do you make something like business communications, which is seemingly intangible, become more verifiable and concrete?

How do you understand the value of the time and effort put into digital communications?

Where are important conversations taking place, and how should you engage in them?

What should you be measuring, and what will all the data mean?

These are issues the team at Thornley Fallis have examined and discussed throughout the past year on our *blog*. Each week, we highlighted a new survey, report or study to help readers gain the insight they need to make the smart decisions necessary to meet their own goals and objectives.

As 2013 draws to a close, we thought it would be appropriate to take a look back at the important new trends, metrics and benchmarks that will inform digital communications strategies into the New Year.

Remembering that research lets us understand what people are looking for, what they value, how they want to be communicated with and by whom, we have put together this brief summary of 2013's most interesting statistics and trends.

Enjoy!



TREND 1: POWERING EVENTS THROUGH SOCIAL MEDIA

In 2013, the second screen trend, having Facebook and Twitter at the ready while you watching TV, really came to the fore. The broadcast of Superbowl 47, along with the sudden power outage, has become a case study in event-based Twitter activity.

According to Twitter's *blog*, approximately 24.1 million tweets were published about the Super Bowl and half time show. In fact, the volume of tweets had surpassed 2012's *totals* by the beginning of the second half of the game.

Twitter also reported spikes in activity throughout the Super Bowl in tweets per minute (TPM):

- Power outage: 231,500 TPM
- Destiny's Child reunion on stage: 257,500 TPM
- End of Beyonce's half time show: 268,000 TPM

As always, Super Bowl advertisements were a major topic of online conversation. 2013 saw an increase in the number of commercials that provided a social media call to action; Twitter was mentioned in 26 of the 52 Super Bowl commercials. This is a huge increase from 2012, when Twitter was only mentioned in eight game time commercials.

The Superbowl power blackout also provided advertisers with an opportunity to participate in more than 231,500 TPM conversations. According to *Twitter*, it took only four minutes for the first promoted tweet to appear when Twitter users searched for 'power outage'.

The British Wimbledon tennis championship of 2013, in which Scottish tennis pro Andy Murray won the men's singles, the first Brit to do so for more than 77 years, offered another demonstration of the power of social media to unite a community of fans far beyond the walls of a sports stadium.

Mentions of Wimbledon on social media more than doubled in 2013 over the previous year. The BBC reported that there were 6.6 million tweets about Wimbledon in just two weeks. In the previous year, there were only 2.5 million similar messages.

Wimbledon by the numbers:

- *Evian* secured the highest number of brand mentions. Other top brands included *Rolex* and *Ralph Lauren*. (*Salesforce*)
- Andy Murray gained 235,000 new Facebook fans in just two weeks. (*Examiner.com*)
- The Murray and Federer were mentioned more than 500,000 times during the men's final. (*Salesforce*)

The world of sports was not alone in benefiting from event-based social media support. Charities and other good causes raised funds and built awareness by convening online communities.



Movember, a month-long campaign, which was founded in Australia in 2003, to educate people about prostate cancer and raise money for cancer research employed social media channels to great effect.

In 2013, 23,600 Canadian men were diagnosed with prostate cancer according to *Canadian Cancer Society: Canadian Cancer Statistics 2013*. That number represents about 25 per cent of male cancer diagnoses.

Movember in Canada:

- Canada ranked third in terms of volume of tweets about Movember with 35,793 tweets in 2012 (*SocialBakers.com*)
- The Canadian Movember campaign raised \$42.6 million in 2012 (*Movember*)
- Of the Canadian funds, 87.2 per cent was committed to programs supporting prostate cancer and male mental health initiatives in Canada (*Movember*)
- Participating countries included: Australia, Austria, Belgium, Canada, Czech Republic, Denmark, Finland, France, Germany, Hong Kong, Ireland, Netherlands, New Zealand, Norway, Singapore, South Africa, Spain, Sweden, Switzerland, UK and USA (*Movember*)
- @MovemberCA, the official account for Movember in Canada has more than 15,000 followers
- Movember is ranked in the top 100 best NGOs (charity) in the world by the Global Journal (*Movember*)

A truly modern NGO, Movember has an *iPhone app* that allows people to track progress of both moustache growing and fundraising efforts. Movember in Canada can be found on *Twitter, Facebook* and *Instagram*.

There can be a dark side to social media; it's being used by bullies to make innocent people's lives a misery, especially teenagers. But anti-bullying week aims to use social media to create social change.

According to *KidsHealth.org* cyber bullying involves the use of technology to harass, threaten, embarrass, or target another person. In the last few years there has been a huge increase in the frequency and severity of bullying, and many people agree that the rise in the use of social media has had an impact on the increase in bullying. A recent report from *Kids Help Phone* suggests that it is easier to say something mean to another person via a computer than it is to do face to face.

According to the Kids Help Phone report:

- 65 per cent of kids surveyed admit to being cyber bullied at least once;
- People are more frequently bullied on social media platforms followed by text messages; and
- Many people feel that reporting cyber bullying is ineffective. When it is reported, 65 per cent of respondents said they would tell a friend rather than a parent or teacher.



Reports of cyber bullying tend to vary as they rely on the victims to report the abuse.

Stop A Bully reports:

- The most common form of bullying reported is name calling and insults (63.5 per cent);
- 41 per cent of victims reported that the bullying lasted “for months”; and
- 44 per cent of victims reported that the incident was witnessed “by a few people”.

Social media and other technologies seem to be a part of the problem, but could they also provide a solution?

Bullying: the power of technology

While bullying is made easier by social media and other technologies, it’s important to remember that these same tools also provide a platform to stand up and make a positive change: Katy Butler, an American teenager, used social media and the online petition platform *change.org** to voice her own opinion and make a difference.

When the documentary film *Bully* was initially released, it was given a restricted rating, which meant it would likely not be seen by those who needed to see it the most. Katy decided to petition the Motion Picture Association of America to change this rating. *Here is a snippet from Katy’s petition:*

This film has the potential to change the world and change the culture of violence in many schools. But your decision to give this movie an R means that the people who need to see this movie the most — teenagers who are either bullying their peers or suffering from violence and torment at the hands of bullies — won’t get to see this film. Nor will this film be allowed to be shown at middle schools and high schools in this country. Please reconsider your decision to give *Bully* an R and give it a PG-13 instead.

According to *change.org*, “*Bully*” will receive a “PG-13” rating from the Motion Picture Association of America (MPAA) after more than 500,000 people — including 35 members of Congress and celebrities like Ellen Degeneres and Meryl Streep — joined a Michigan high schooler’s campaign on *Change.org*.”

From the *change.org* platform alone, Katy’s petition received:

- 523,467 signatures,
- 81,000 Facebook likes, and
- 5,353 tweets.

According to *The Bully Project* producers the film has now been seen by more than a million kids, educators and advocates. Clearly, one person can make a difference, thanks to social media.

Retailers too are benefiting from event-based social media. Black Friday and Cyber Monday are excellent examples of marketing events, invented to spur people into getting online for holiday shopping. They demonstrate that yes, indeed, social media marketing does drive sales.

Twitter published the finding from its survey of shoppers:

- Seven out of ten Twitter users rely on the platform to enhance Black Friday and Cyber Monday shopping experiences
- Twitter users are more likely to shop on Black Friday and Cyber Monday compared to the rest of the population (85 per cent of Twitter users shop on Black Friday and 81 per cent shop on Cyber Monday compared with 84 per cent and 70 per cent of people not on Twitter)
- 60 per cent of Twitter users surveyed said that the platform plays an important role in their online shopping on Cyber Monday
- 56 per cent of users surveyed said Twitter is the first place they go to research products on Cyber Monday
- 78 per cent of users surveyed said they would click through to a sale they saw posted on Twitter

Cyber Monday advice for retailers:

1. Ensure your mobile website is up, running and ready to go because, *according to the study*, 41 per cent of Twitter users use their phone to make a purchase and 49 per cent use their phone to check prices;
2. Make sharing news of their purchase is easy for online customers to share via Twitter, Facebook or Pinterest;
3. Add a call to action to all tweets by including a link to the relevant product page;
4. Monitor social media for company or brand mentions to quickly resolve customer complaints; and
5. Consider using paid promotion tweets to be heard above the noise.



TREND 2: SOCIAL MEDIA FOR HEALTH

Since the dawn of the World Wide Web, people have been going online for information about personal health concerns. Sites like WebMD, Wikipedia and healthcaretransformation.ca (client) provide a wealth of information about diseases, conditions, treatments and cures often to the consternation of health care professionals whose job it is to diagnose and treat their patients.

The Pew Research Center Internet & American Life released a survey titled: Health Online 2013. The report found that 81 per cent of adults use the Internet and, of those, 72 per cent say they have looked online for health information in the past year.

- 16 per cent of Internet users went online to find other individuals who might be dealing with the same medical issue or health concern;
- One in three adults (35 per cent) have used the Internet to find information about a medical condition;
- 30 per cent of Internet users have read online reviews or rankings of health care services or treatments;

Who is most likely to seek health information online?

The Pew Internet survey found that women are most likely to look online for health related information. The report also found that half of health information searches were completed for the benefit of someone else.

What does this mean?

The report concedes that most care takes place offline, rather than online. However, it is becoming more common for people to do research online before arranging to meet with their physician or health care provider.

An earlier Pew study, Mobile Health 2012, found that one in three cell phone owners (31 per cent) have used their phone to look for health information, an increase from 17 per cent two years ago. In addition, one in five smartphone owners have a health app.

But on the Internet, health is about a lot more than just facts and figures. A key trend for 2013 was health tracking. A *Pew Internet survey, Tracking for Health*, found that 69 per cent of adults are tracking health metrics. Of those, only 21 per cent use technology to track their health.

There is a wide range of data apps available to help people track diet, fitness, exercise.

The Pew survey found that those who track are most likely to record:

- weight, diet or exercise (60 per cent);
- other health indicators like sleep, blood pressure, headaches (33 per cent); and
- health indicators on behalf of someone else (12 per cent).



How are people tracking their health if they're not using technology?

The Pew survey found that:

- 49 per cent keep track “in their heads”; and
- 34 per cent use a journal or notebook.

Tracking can have important consequences:

- 46 per cent of trackers say that tracking has had an impact on the way they approach their health or the health of someone they care for;
- 40 per cent say tracking has prompted them to ask questions or seek a different opinion; and
- 34 per cent say tracking has had an effect on approach to treatment.

However the majority of Internet users eschew tracking and creating their own health-related content. A study published by *Brigham Young University* and published in the *Journal of Medical Internet Research* found that rather than creating health related information online people prefer to just get the facts.

More specifically, the survey of 1,745 adults who had gone online to look for health related information found:

- 41 per cent reported looking at online rankings or reviews, but less than 10 per cent admit to posting a review;
- 32 per cent report using social media or social networking sites for health; and
- 15 per cent posted a comment or question.

Additionally, the survey found that people with chronic conditions were more likely (twice as likely) to look at online rankings. Male respondents were less likely to consult online reviews than female respondents. Additional demographic insight can be found [here](#).

Social media could be a great resource for those looking to encourage public participation, engagement and dialogue about a wide variety of issues—including health.

In this post, Pierre Killeen, VP of Engagement at Thornley Fallis points out that social media works when it makes sense to the audience and when it is part of a larger ecosystem:

While social media websites form part of the ecosystem, our experience suggests that social media is more than a piece; it is the air or the water that connects one piece to the other. Social media is what allows information to quickly flow from one piece of the ecosystem to another.

It is imperative that people feel comfortable sharing what could be sensitive information. Social media may make this possible, but organizations should also consider specially designed and anonymous forum where individuals can discuss and share their feelings and experiences freely.

A rich and diverse supply of health-related information online is a benefit to us all. Communicators can harness the power of digital communications to create an online space where meaningful dialogue can take place allowing for people to get the help they need and businesses and communicators to get the feedback they require to do their jobs better.



Caregivers online

According to recent research published by the *Pew Internet and American Life Project*, in association with the *California Healthcare Foundation*, nearly 40 per cent of adults are caregivers. This number has increased by almost 10 per cent since 2010.

The survey found that caregivers are connecting online and are more likely than other adults to:

- Go online to look for health information, especially when it comes to treatment;
- Look for others online who also have experience with the same condition;
- Consult online reviews about treatments; and
- Read about other health experiences online.

The study revealed some other attributes of caregivers that may help health providers and communicators to better connect:

- 41 per cent of caregivers are from a household of three adults or more;
- 44 per cent of caregivers have at least some college education;
- 43 per cent of caregivers have a household income of \$75,000 or more; and
- 44 per cent of caregivers are 50 to 64 years of age.

This is important information for healthcare providers and communicators who seek to reach out to caregivers online. But creating a space where people feel comfortable openly sharing their experiences—as well as providing valuable insight that can shape future services—can be tricky. To create a community that provides real value, it's important to understand your audience and their needs.

So clearly, the data shows that the Internet and social media are becoming crucial to health care and this provides ample opportunity for organizations in the health industry, but it takes quality content and smart, sensitive solutions to create occasions for engagement and to build online communities.

TREND 3: MOBILE! MOBILE! MOBILE!

The march towards mobile's dominance of the Internet continued unabated throughout 2013. The use of mobile responsive web design, or design websites that can work across multiple hardware formats was the single biggest trend.

The Pew Internet and American Life Project published research which showed that *most people now own a mobile phone*. The survey showed that 34 per cent of adults now own tablet computers, too. This is an increase from only 18 per cent in 2012 and even further evidence that a website should be optimized for mobile and tablet access.

The research also provides important insight into who is most likely to own a tablet computer:

- Households with income of at least \$75,000 per year;
- Adults ages 35 to 44 years old; and
- College graduates.

Pew's survey *Teens and Technology 2013*, found that:

"One in four teens are 'cell-mostly' internet users, who say they mostly go online using their phone and not using some other device such as a desktop or laptop computer."

The survey looked at 802 teens aged 12 to 17 and asked questions about technology, access and availability, use and preference. Additional interesting findings of the survey include:

- 78 per cent of teens have cell phones. Of these teens, 47 per cent say they have smartphones.
- The number of teens who have smartphones has increased by 14 per cent over the past two years.
- The most likely group of teens to access the internet mostly via mobile is girls aged 14 to 17 years old.

What does this mean for marketers?

The future is mobile. More often than ever before, people of all ages are accessing the internet via a mobile device.

A brand targeting teens aged 12 to 17, and especially girls within this segment, you should ensure use a mobile friendly website. Teens want to be able to navigate their favourite sites easily and this means mobile responsive design.

Most mobile device users have easy access to news and social networks, but it puts charitable giving right into people's hands.

According to a report by the Pew Internet Project called "Real Time Charitable Giving":

- One in five (20 per cent) adults have donated money online; and
- One in ten (9 per cent) have made a donation via SMS.



Mobile giving gained popularity after the January 2010 earthquakes in Haiti where, according to the people donated approximately \$43 million to relief efforts using the SMS feature of their cell phones. In association with the *Berkman Center for Internet and Society at Harvard University* and the *mGive Foundation*, and supported by the *John S. and James L. Knight Foundation*, the *Pew Internet Project* conducted a survey of 863 people who donated money to the relief efforts in Haiti via SMS.

Some interesting findings of the survey include:

- Most of these donors (89 per cent) heard about the relief efforts on TV;
- 50 per cent made a donation immediately after hearing of the mobile option to give; and
- Just under half (43 per cent) of those surveyed also encouraged friends and family to make a similar contribution.

The *survey* showed that individuals who made a mobile donation to the relief efforts in Haiti were more likely than others to own an e-reader, laptop or tablet computer. They were also more likely to use Twitter or other social networks. In addition, these adults were more like to use their mobile phones to access the Internet.



TREND 4: IT'S ALL ABOUT USERS

Use of the internet and social media is now mainstream, but 2013 saw clear demographic trends and practices among users. Here's a breakdown of some of the key aspects of how people are communicating digitally.

Men and women tend to use social media *platforms differently*. Of all platforms, Pinterest represents the greatest difference. Twenty-five per cent of women surveyed said they used Pinterest, while only five per cent men said they used the platform.

Other platforms saw more equal use among women and men. About the same number of males and females use Twitter and Tumblr. Facebook has a slight female bias and more women than men use Instagram.

Age is another determinant of how people use digital technology. Among teens, for example, dependence on the *use of cell phones to access the Internet* is high. One in four teens are 'cell-mostly' internet users, who say they mostly go online using their phone and not using some other device such as a desktop or laptop computer.

Other facts about digital teens:

- Seventy-eight per cent of teens have cell phones; 47 per cent have smartphones which is up 14 per cent in two years.
- Girls aged 14 to 17 are most to use cell phones for Internet access.

Social networks are popular among young adults; 67 per cent "engaged in some sort of social network-related political activity" in the last year. Almost a third of this age group are on *Twitter*, one in five is on Pinterest, 86 per cent use Facebook and a third use Instagram. Only one in ten are on Tumblr. Cell phone use among this demographic is prevalent with 85 per cent of mobile phone owners aged 18 to 29 going online on their phones.

Adults over 30 are on social media in droves and many are politically minded; *almost three-quarters* of use social media. Almost half personally engaged in a "*civic group or activity*" online and a third "contacted a government official or spoke out in a public forum" online. Even more, 39 per cent, engaged in "some sort of political activity" on a social networking site.

Many adults use the Internet to research personal *health information*, track health metrics and to discuss health issues. Thirty-two per cent of adults report using social media or social networking sites for health. One in ten admits to posting a health related review.

Most adults use mobile phones. Ninety-one per cent own a cell phone; more than half of those own a smart phone. Seventy-three per cent of mobile phone owners aged 30 to 49 go online on via cell phone and more than half of adults aged *50 to 64 years old do the same*.



However not all adults are online; 15 per cent of adults ages 18 and older *are not online*, meaning that they do not use the internet or communicate via email. One third of these said they are not interested in going online or think the Internet is not relevant to their lifestyle; another third cited concern about online security.

Adults aged 65 and over have *more than tripled their online presence* over the past four years. Of those, only two per cent said they used Twitter, four per cent said they used Pinterest, two per cent said they used Instagram. Facebook holds more interest for seniors with 35 per cent using it. Interestingly, 22 per cent of mobile phone owners aged 65 and over go online on using their mobile phones.

One interesting demographic metric is the level of affluence among users. According to a *survey published by LinkedIn and Cogent Research*, 87 per cent of the “mass affluent” use social media. Considered to be a “highly valued segment” the “Mass Affluent” are defined as “current investors with \$100,000 to \$1 million in assets, excluding the value of their homes. *According to the survey*, there are major gaps between what this group hopes to get from social media and what they actually receive.

The “mass affluent” value “improved customer service, timely updates, and relevant content”, and nearly half interact with financial institutions via social media.



TREND 5: INTEGRATION OF DIGITAL AND TRADITIONAL

In 2013 the growing trends toward an ‘always on’ society continued. A *report* highlighting Pew Internet’s research on social networking provided a look at who is using social media and what platforms are the most popular.

According to the survey:

- 69 per cent of Americans said they use social networks;
- More women (75 per cent) than men (63 per cent) say they use social media; and
- 40 per cent of cell phone owners use social media, and 28 per cent use social on their mobile phones each day.

Effective digital communications requires an in-depth understanding of your audience: who they are and how they’re spending time online. This means thinking strategically about your approach to communications in the digital era and devoting adequate time and resources necessary to build strong connections.

Data is driving marketing decisions

BlueKai conducted a survey of marketing executives to learn more about the importance of data in creating marketing programs. This research sheds light on the type of data marketers are using and how they are applying that data.

Key findings include:

- 91 per cent of respondents said that data was “of primary importance for segmentation and targeting of [their] marketing efforts”;
- 67 per cent of respondents said “more than half of their digital efforts are driven by data”;
- 87 per cent of respondents rely on first-party data including website data (83 per cent), CRM and registration data (79 per cent), email data (72 per cent), digital campaign data (67 per cent), search data (45 per cent), and mobile site or app data (28 per cent);
- 72 per cent of respondents rely on third-party data for marketing including third party targeting data (62 per cent), third party mailing lists (49 per cent) and third party co-op data (33 per cent); and
- Mobile is still an untapped resource. More than 50 per cent of marketers said they devote between zero and 25 per cent of their budget to mobile marketing.

Marketers spent more on digital in 2013 and budgets are expected to more than double over the next few years.



Researchers at CMO Survey shared some insight into current and planned marketing spend.

Key findings include:

- Financial resources allocated to social media (as a portion of marketing budgets) will more than double in the next five years;
- Fewer than 10 per cent of marketers felt that social media is “very integrated” into strategy; and
- Approximately 15 per cent of marketers felt that social media is not integrated into their strategies at all.

Integration however has never been more crucial, especially when you consider that four out of five people conduct online research as part of their purchasing process. *A study conducted by GE Capital Retail Bank* has found that 81 per cent of people look at products online before making a purchase in store and that figure had increased by 20 per cent over the previous year.

In addition, the survey found:

- Consumers spend an average of 79 days gathering information before making a major purchase;
- 60 per cent of people start their research with a search engine before heading to a specific website;
- 66 per cent of people conducted their research on a PC or laptop at home and 15 per cent conducted their research on a mobile device at home; and
- 79 per cent of people feel empowered by technology because it provides access to information.

But companies, brands and products have to be findable, if they are going to feature in buyers’ research. *A study was conducted by Chitika*, an online advertising network, provides some interesting reading about the importance of search engine rankings:

Value of Position in Google Search:

- A website ranked first in a Google search result receives 33 per cent of the average traffic share;
- A website ranked second in a Google search result receives 18 per cent of the average traffic share; and
- A website ranked third in a Google search result receives 11.4 per cent of the average traffic share.

Value of Google Search Page Ranking:

- Websites on the first page of Google search results receive 92 per cent of all traffic;
- Traffic to websites on page two drops by 95 per cent; and
- Traffic to websites on page three drops by another 78 per cent.



For steps to improving search results:

1. Experiment with a *mixture of paid, earned and owned content*;
2. Update website content regularly;
3. Blog frequently; and
4. Share and engage on social networks.

The smartphone breakthrough meant that in 2013, marketers were putting mobile at the centre of their strategies.

Cyber Monday 2013 provides an excellent example. *According to Adobe Digital Index*, online sales for Cyber Monday totalled more than \$2 billion dollars—a 16 per cent growth year over year.

EConsultancy published the findings of Cyber Monday survey. Key findings include:

- Mobile traffic accounted for 42 per cent of all Cyber Monday traffic, an increase of 68 per cent from 2012; and
- 31 per cent of sales were made via a mobile device, an increase of 82 per cent from 2012;

On Cyber Monday, retailers surveyed saw the following trends:

- A 93 per cent increase in total mobile visits;
- A 219 per cent increase in mobile transactions
- A 368 per cent increase in revenue from mobile transactions

However, when it comes to digital strategy, sales leads are not the only consideration. Corporate and brand reputation also come into play. Since the inception of social media for business many organizations have warmed to the idea of using social media, but that doesn't mean many decision makers are not concerned about risk. *A 2013 survey conducted by Grant Thornton*, in association with Financial Executives Research Foundation, discovered that more than half of companies included in the survey (59 per cent), had not conducted a risk assessment before engaging in *social media*.

Four areas of perceived risk were identified in the report:

1. Damage to brand/reputation
2. Disclosure of information
3. Identity theft
4. Legal/regulatory/compliance violations

The survey found that 71 per cent of executives were concerned about risk, but believed that certain measures could be taken to avoid risk.



Some recommendations to avoid or prepare for crisis situations:

- Conduct an internal and external audit to review existing policies, procedures and guidelines for communication. This process may identify gaps in corporate policies that can easily be remedied.
- Interview stakeholders within your organization to discover areas of concern
- Provide training to employees with access to social media.
- Prepare a crisis plan that outlines steps for reporting and responding to negative comments and feedback online.



TREND 6: SOCIAL NETWORKS SERVE BRANDS & USERS

Throughout 2013, popular social media platforms implemented changes and developments designed to improve both the user experience and advertising effectiveness.

What social platforms are most popular?

According to a Pew Internet survey, *Photos and Videos as Social Currency Online*, 46 per cent of online adults are posting content that they have personally created. Others (41 per cent) spend time sharing content created by someone else.

The survey says:

- Two-thirds (67 per cent) of online adults are on Facebook;
- Nearly one in five (19 per cent) online women use Pinterest;
- 12 per cent of adults, and 27 per cent of young adults (aged 18-29) use Instagram; and
- 5 per cent of adults, and 11 per cent of young adults, use Tumblr.

Instagram, for example, continued its march towards world domination as a key photo and video sharing platform. It reached more than 150 million active monthly users before it turned three years old.

Key milestones include:

- More than 16 billion photos have been shared on Instagram;
- Instagram reached 150 million active monthly users;
- 60 per cent users are outside of the United States;
- Approximately 55 million photos are posted each day; and
- Posts receive 1.2 billion likes daily.

With numbers like those, it's clear why businesses are flocking to *Instagram*. The platform is a great resource to tell brand stories.

The other picture platform, Pinterest also made great gains among brand owners in 2013. The introduction of a web analytics function added required business gravitas to this fun photo sharing network. *According to Pinterest* "...website owners help create the content on Pinterest and we wanted to help them understand which pieces of content people find most interesting... *Web Analytics* gives site owners insights into how people are interacting with pins that originate from their websites."

Pinterest is a great resource for online companies, marketers and communicators.

- According to a survey by Pew Research, 15 per cent of online adults say that they use Pinterest. This is the third-most used social network according to respondents, after Facebook and Twitter;

- EConsultancy notes that approximately 28 per cent of Pinterest users have an annual household income of at least \$100,000; and
- Another Pinterest survey shows that Pinterest users are 10 per cent more likely to make a purchase over other major social media sites such as Facebook and Twitter.

It's true, social media platforms do drive sales. Vision Critical produced a report called "*From social to sale: 8 questions to ask your consumers*," which contained some data from Canada, the United States and the United Kingdom. It shed some light on social media's impact on sales.

Key findings of the report include:

- Four in ten social media users have bought something after "sharing" or "favouriting" it on social networks including Twitter, Facebook or Pinterest;
- Online and in-store purchases driven by social media are relatively equal;
- Pinterest is the most-likely catalyst to drive "spontaneous purchasing";
- 29 per cent of Pinterest users have made a purchase after liking/pinning an item on Pinterest;
- 38 per cent of Facebook users have made a purchase after sharing/liking an item on Facebook; and
- 22 per cent of Twitter users have purchased something after tweeting, retweeting or favouriting it on Twitter.

In 2013, LinkedIn was revealed to be a key platform for reaching the more affluent. The business social network *published a report*, along with Cogent Research, which showed that 87 per cent of the demographic it defines as "Mass Affluent" uses social media.

The study aimed to determine what these very rich people like about social media and where they find value in particular with reference to financial education and decision making.

Key findings include:

- There are major gaps between information provided and the expectations of the "Mass Affluent";
- They value "improved customer service, timely updates, and relevant content";
- Nearly half of the "Mass Affluent" interact with financial institutions on social media;
- 63 per cent who use social media to find out about financial options are influenced by what they learn;
- Nearly a quarter of this group expects banks and financial institution to be on social media;
- New product information is highly valued.

In terms of mobile apps, privacy was revealed as a very real concern in 2013. Nearly half of the top 100 free apps do not offer privacy policy prior to download. This figure comes from research published by *MEF*, the global community for mobile content and commerce.

According to the study:

- Only one in two apps (55 per cent) offer a privacy policy prior to download in the app store;
- Only a third (32 per cent) offer access to the policy within the app; and
- 69 per cent of privacy policies are written in long form (more than 750 words).

Privacy statements are important. Previous research found that 70 per cent of consumers feel it's important to know what information is being collected and shared. *MEF's research also found* that the average privacy policy found online is too long. The average privacy policy for the top 100 free apps took 12 minutes to read, assuming 250 words were read per minute. The longest privacy policy took 32 minutes to read and only eight per cent of policies were written in less than 750 words.

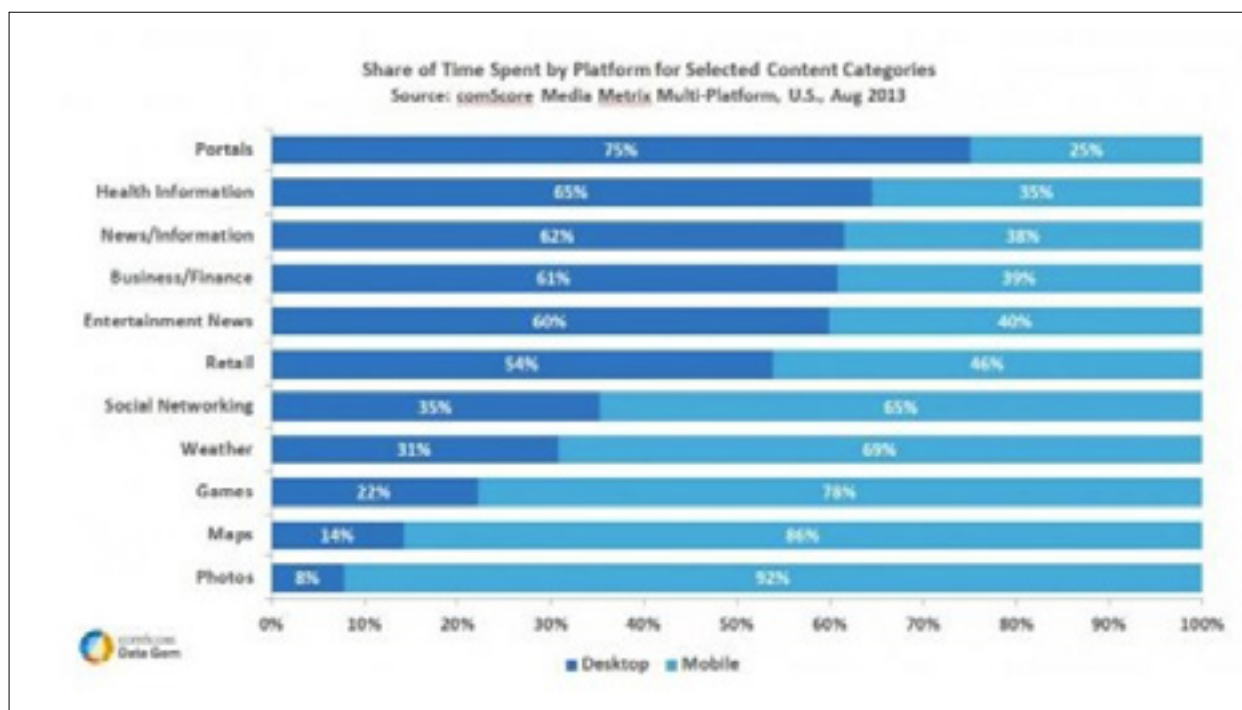
It's important to give customers and consumers the information they need to know and every effort should be made to communicate this information in a concise manner.

An infographic of this research can be found [here](#).

TREND 7: HANDHELD TO THE FORE

A new report from ComScore provides insight into where we access content. This new data helps many marketers make the case for investing in mobile. The ComScore Data indicates that the time to think about mobile is now.

For example the *ComScore data shows* that 46 per cent of people interact with retail sites via mobile devices.



It's a trend that played out big time on Cyber Monday 2013. According to *EConsultancy*, mobile traffic accounted for 42 per cent of all traffic on Cyber Monday, an increase of 68 per cent from 2012.

Pew Internet and American Life Project research showed that the majority of adults are now smartphone users:

- 91 per cent of adults own some sort of mobile phone;
- 56 per cent of adults own smartphones;
- 35 per cent own a mobile phone that is not a smartphone; and
- Nine per cent of adults do not own a mobile phone at all.



Indeed, Canadians are leading the way; 78 per cent of us will not leave home without our smartphone. More than half of Canadian adults (56 per cent) are using smartphones, according to a *report published by Google and Ipsos MediaCT*. The number of Canadians using smartphones was up 23 per cent in 2013 over 2012.

Some of the key findings show that in Canada:

- 66 per cent of Canadians said they used their smartphone every day in the past seven days
- 78 per cent said they do not leave their home without their smartphone
- 86 per cent said they use their smartphone in a store
- 35 per cent said they would rather give up TV than their smartphone
- 55 per cent said they search on their smartphones each day
- 68 per cent said they look up product information on their smartphones
- 75 per cent said they watch video on their phone and 18 per cent do so at least one time each day
- 51 per cent have conducted a mobile search after seeing an offline ad
- 87 per cent said they have noticed mobile ads

And of course, mobile does not refer only to smart phones: a third of adults now own a tablet computer. Research from Pew Internet, says that 34 per cent of adults now own tablet computers up from only 18 per cent in 2012.

Who is most likely to own a tablet computer?

- Households with income of at least \$75,000 per year;
- Adults ages 35 to 44 years old; and
- College graduates.



TREND 8: CANADIANS DOMINATE

ComScore, Inc. released “*Canada Digital Future in Focus 2013*,” a report that includes information about online Canadians as well as the mobile market, social networking, retail, banking and automotive sectors in Canada.

Key findings from the report:

- 34 per cent of online Canadians have an annual household income of \$100,000 or more;
- Canadians rank first in terms of ‘average quantity of monthly pages viewed per visitor’ (3,731) and ‘average monthly visits per visitor’ (101);
- Canadians rank second in ‘average number of hours spent online per month’ (41.3);
- In terms of video consumption, Canadians watch approximately 291 videos per month and roughly 24.8 hours of online video per month; and
- Social networking in Canada grew three per cent in the last 12 months.

The global mobile trend holds true in Canada too. *A report by Google and Ipsos MediaCT* showed that number of Canadians using smartphones now is up 23 per cent and 78 per cent of Canadians say they do not leave their home without their smartphone. Advertisers should take note that 35 per cent of Canadian said 35 per cent said they would rather give up TV than their smartphone.

And social media is key to reaching Canadians too. A survey by *Vision Critical* included Canadians and revealed that 40 per cent of social media users buy something after “sharing” or “favouriting” it on social media like Twitter, Facebook or Pinterest. Indeed, the study showed that online and in-store purchases driven by social media are relatively equal.

Canadians are not only social media consumers; we are social media givers too. Just look at Movember Canada. The official Twitter account for Movember in Canada has more than 15,000 followers and Canada ranks third in terms of volume of tweets about Movember with 35,793 tweets last year.

Follow the Movember in Canada journey on *Twitter*, *Facebook* and *Instagram*.



DATA + CONTEXT = INSIGHT

At Thornley Fallis and 76design we provide *insight, we create and we connect*.

As an integrated marketing communications agency specializing in social and digital services, we provide insight that is crucial to smart solutions.

Our team of digital natives understands how the Internet works, and how people use it. They have the smarts to turn this knowledge into workable solutions for real world challenges.

Combining cutting edge analytical technologies with deep, broad industry experience delivers thoughtful, thorough and relevant analysis. This smart thinking is the basis of creative excellence and communications effectiveness.

It's a winning formula that has helped:

- One of Canada's largest trade *unions reach members coast to coast*.
- BlackBerry *launch the Z10*, and
- Federal government tap the power of social media to connect with *hard-to-reach audiences*.

Get the sharp strategy, compelling content and meaningful connection that your business needs to thrive in the connected era. Get Thornley Fallis and 76design on your team.

We'd love to have chat with you about the challenges your organization is facing in 2014. [Click here](#) set up a no-obligation appointment.

Kind regards,
The Thornley Fallis 76design team!