

The Democratization of Online Social Networks

A look at the change in demographics of social network users over time

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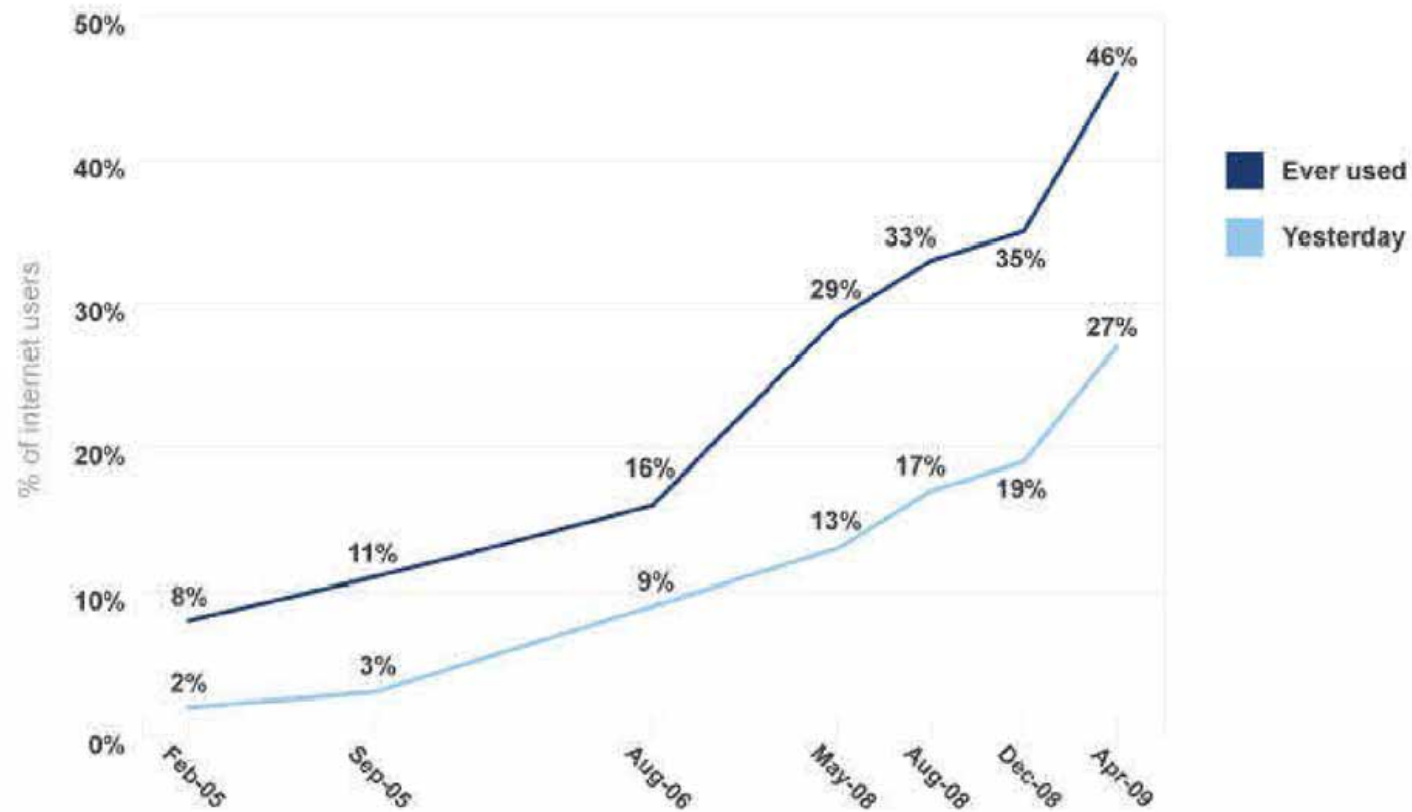


Methods

- RDD phone surveys with American adults 18 and older
 - August 2009
 - April 2009
 - February 2005
 - Sept 2005, August 2006, May 2008, August 2008, December 2008
 - Cross-sectional data
- 2005 question wording: “Do you ever use online social or professional networking sites like Friendster or LinkedIn?”
- 2006 question wording: “Do you ever use an online social networking site like MySpace, Facebook or Friendster.”
- 2009 question wording: “Do you ever use a social networking site like MySpace, Facebook or LinkedIn.com?”

Growth in Adult SNS Use, 2005-2009

46% of online American adults 18 and older use a social networking site like MySpace, Facebook or LinkedIn, up from 8% in February 2005.





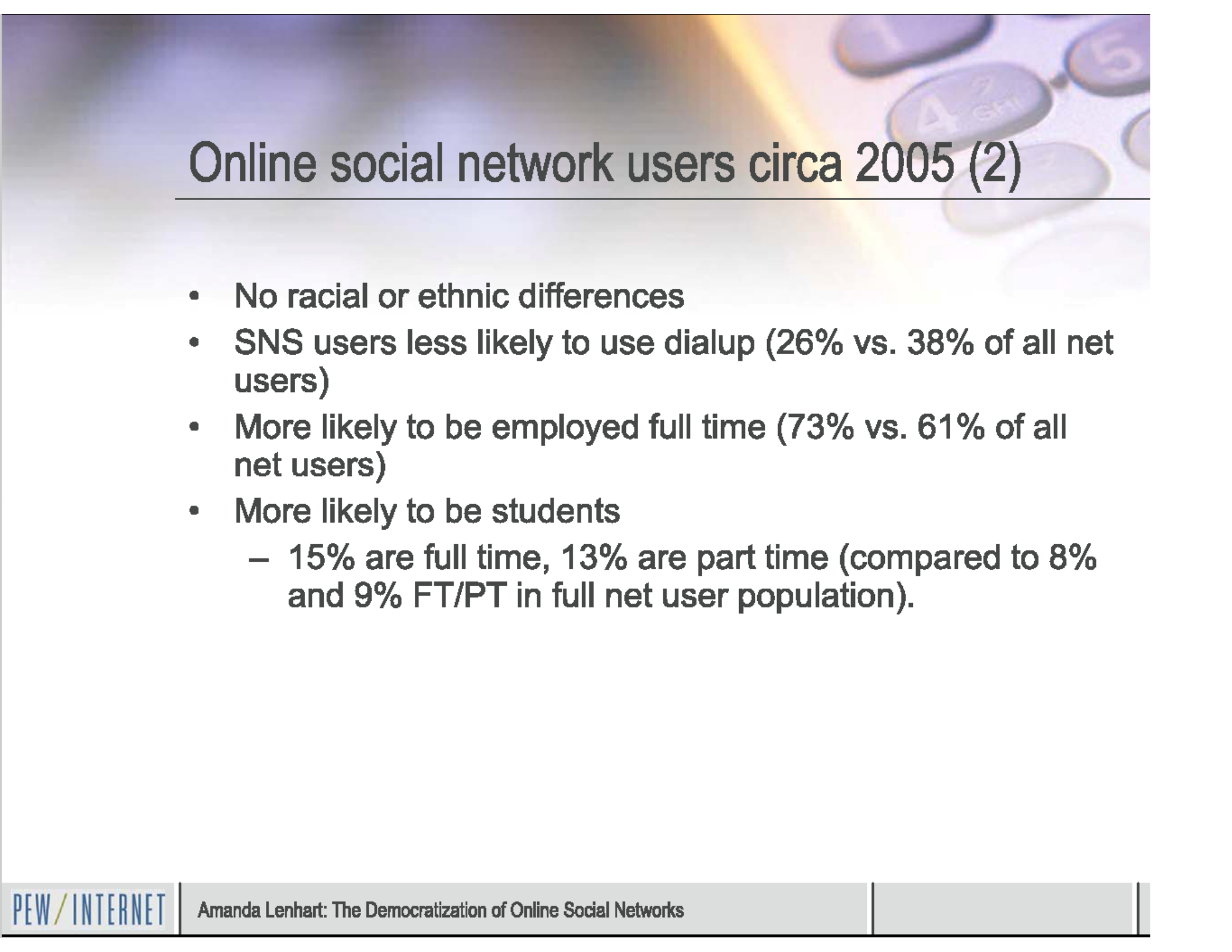
The Basics

- 79% of American adults used the internet in 2009, up from 67% in Feb. 2006
- 46% of online American adults 18 and older use a social networking site like MySpace, Facebook or LinkedIn, up from 8% in February 2005.
- 65% of teens 12-17 use online social networks as of Feb 2008, up from 58% in 2007 and 55% in 2006.
- As of August 2009, Facebook was the most popular online social network for American adults 18 and older.
 - 73% of adult SNS users have a Facebook account
 - 48% have a MySpace profile
 - 14% have an account on LinkedIn
 - 1% each on Yahoo, YouTube, Tagged, Flickr and Classmates.com
 - 10-12% are on “other” sites like Bebo, Last.FM, Digg, Blackplanet, Orkut, Hi5 and Match.com



Online social network users circa 2005

- Highly educated
 - 45% of SNS users have a college or advanced degree, 35% of whole internet pop has same
- Urban, but no regional differences
 - 41% live in urban areas, compared to 32% of the internet using population
- Slightly more male (55% male vs. 45% female)
- Skews to under 45
 - 19% of adult SNS users are 18-24 (vs. 14% of all net users)
 - 27% are 25-34 (vs. 21% of all net users)
 - 29% are 35-44 (vs. 24% of all net users)
 - 16% are 45-54 (vs. 22%)
 - 7% are 55-64 (vs. 12%)
 - 3% are 65+ (vs. 7% of all net users)



Online social network users circa 2005 (2)

- No racial or ethnic differences
- SNS users less likely to use dialup (26% vs. 38% of all net users)
- More likely to be employed full time (73% vs. 61% of all net users)
- More likely to be students
 - 15% are full time, 13% are part time (compared to 8% and 9% FT/PT in full net user population).



Online social network users circa 2009

Democratization of online social networks

- Urban tilt has disappeared – though rural areas still lag slightly (age)
 - 29% of SNS users live in urban areas vs. 30% of internet users
 - 56% of SNS users live in the suburbs, 52% of net users do
 - 15% of SNS users live in rural areas, 18% of internet users
- Still no regional differences
- Now no differences in likelihood of full-time employment (54% SNS vs. 53% internet users)
- Education levels look like internet using population
- SNS users just as likely to have bbd as all net users

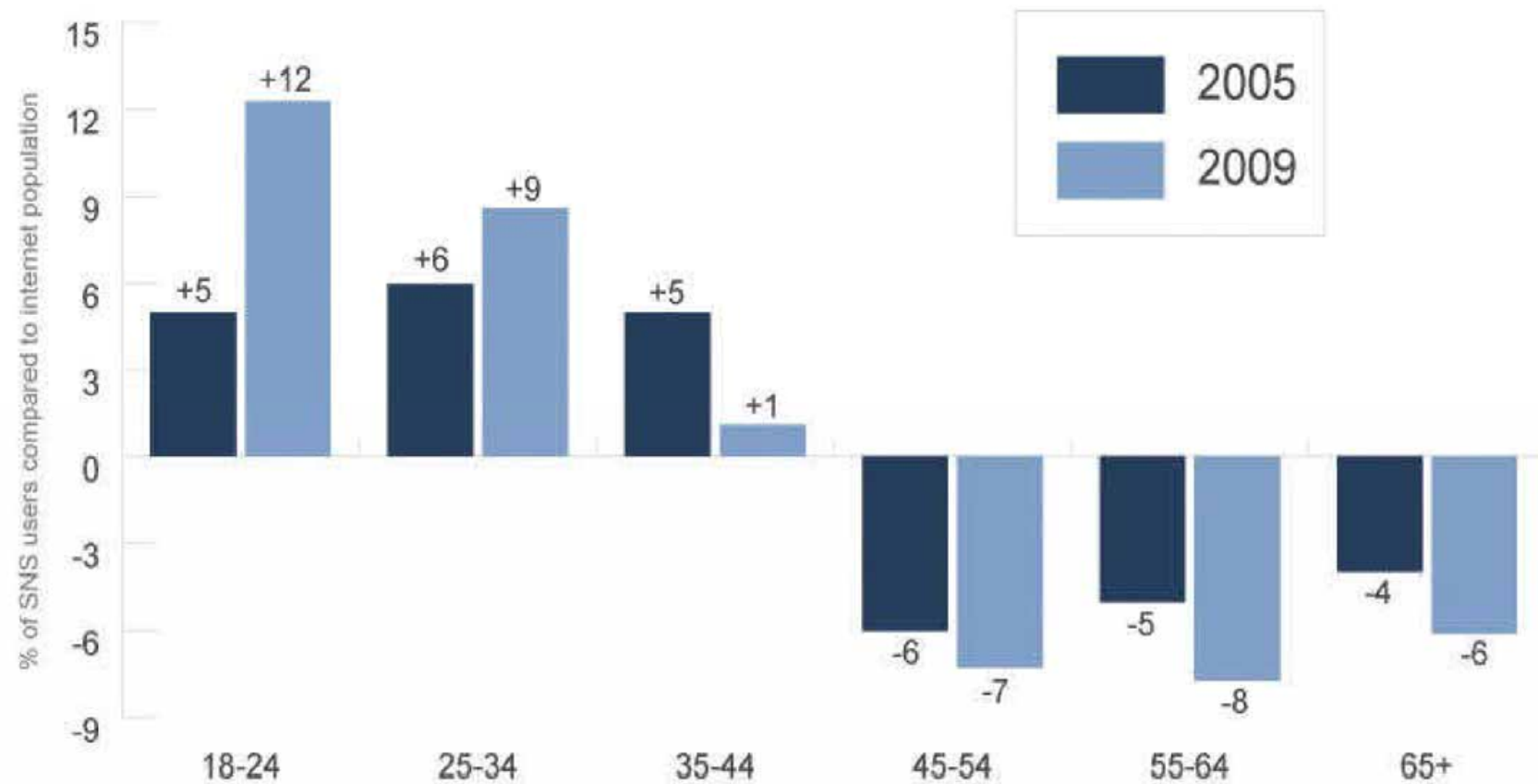


Online social network use circa 2009 (2)

- Skews more female (54% female vs. 46% male)
- In the SNS population – younger adults make up a slightly greater proportion of the SNS using population than in 2005.
 - 18-24 year olds are 28% of the social networking population, but 16% of the internet using population
 - 25-34 year olds are 29% of SNS using population, but 20% of the online population
 - 35-44 yos are 22% of the SNS population and 20% of the internet population
 - 45-54 yos are 13% of the SNS population and 20% of the internet using population
 - 55-64 yos are 6% of the SNS population and 14% of the internet using population
 - 65+ make up 3% of the SNS population and 9% of the internet using population

Share of SNS user population compared to internet user population, by age

The proportion of age group in the SNS population compared to its representation in the overall internet population for 2005 and 2009





Conclusions

SNS users have gone from being classic early adopters --

- Male, highly educated, young to middle-aged, urban...

...To every man and woman – with a continued skew towards youth

-As diverse, if not more than the internet-using population

Doesn't mean that more older adults aren't flocking to SNS – they are -- but younger adults are ALSO flocking to the sites, so the overall representation of the age cohorts in the SNS user population has actually gotten younger, even as SNS use overall has grown.

