

Social: A closer look at behaviour on YouTube & Facebook

Executive summary

3 September 2010



This research looks at the behaviour and attitudes of **YouTube** and **Facebook** users, with the aim of understanding the role of each in users' online lives, including :


- Motivations for visiting the sites and how they feel when they do
- 'Social' activities conducted on each
- Attitudes towards brand presence & different types of advertising on the sites
- Motivations and behaviours around viewing and sharing brand content


We conducted an online survey among **1,000** respondents in each **UK, France and Germany**) aged **16-55** years. To qualify, respondents had to use YouTube and Facebook **at least once a month**.


Fieldwork took place in **June 2010**.


Unless otherwise specified, results are averaged across all 3 countries.




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1 While it's commonly assumed that everyone uses YouTube and Facebook, the overlap is smaller than you'd expect.
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2 Social networking is greater than any single site. YouTube and Facebook play different but integral roles in a user's online social experience.
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3 Brands that advertise on each site benefit from the perceived attributes of each site.
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4 Users are equally likely to check out brands on both sites, but which brands and what type of content they look for differ.
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5 Loyalty and familiarity are not the driving force behind recommendations. Whether people share or like a brand depends greatly on whether its content is interesting.

How are people using YouTube & Facebook?



Reach of YouTube and Facebook



% of all active Internet users who visited these sites



Source: Active reach / Nielsen NetRatings, August 2010

Only around 1/3 of the online population is on both YouTube and Facebook

Source: Nielsen NetRatings, May 2010

- 30 minutes Duration of a typical visit on YouTube or Facebook
- 26% Users who access Facebook via mobile
- 15% Users who access YouTube via mobile
- 3% Users who access either site from a Tablet (e.g. iPad)
- 25% Among heavy users, proportion of total time spent accessing each site from a mobile phone



While on YouTube on the PC

49% are doing something else on the internet

27% watching TV

27% are with friends

21% are eating a meal



While on Facebook on the PC

55% are doing something else on the internet

40% watching TV

24% are eating a meal

20% are with friends



While on YouTube on the mobile

37% are with friends

20% watching TV



While on Facebook on the mobile

33% are with friends

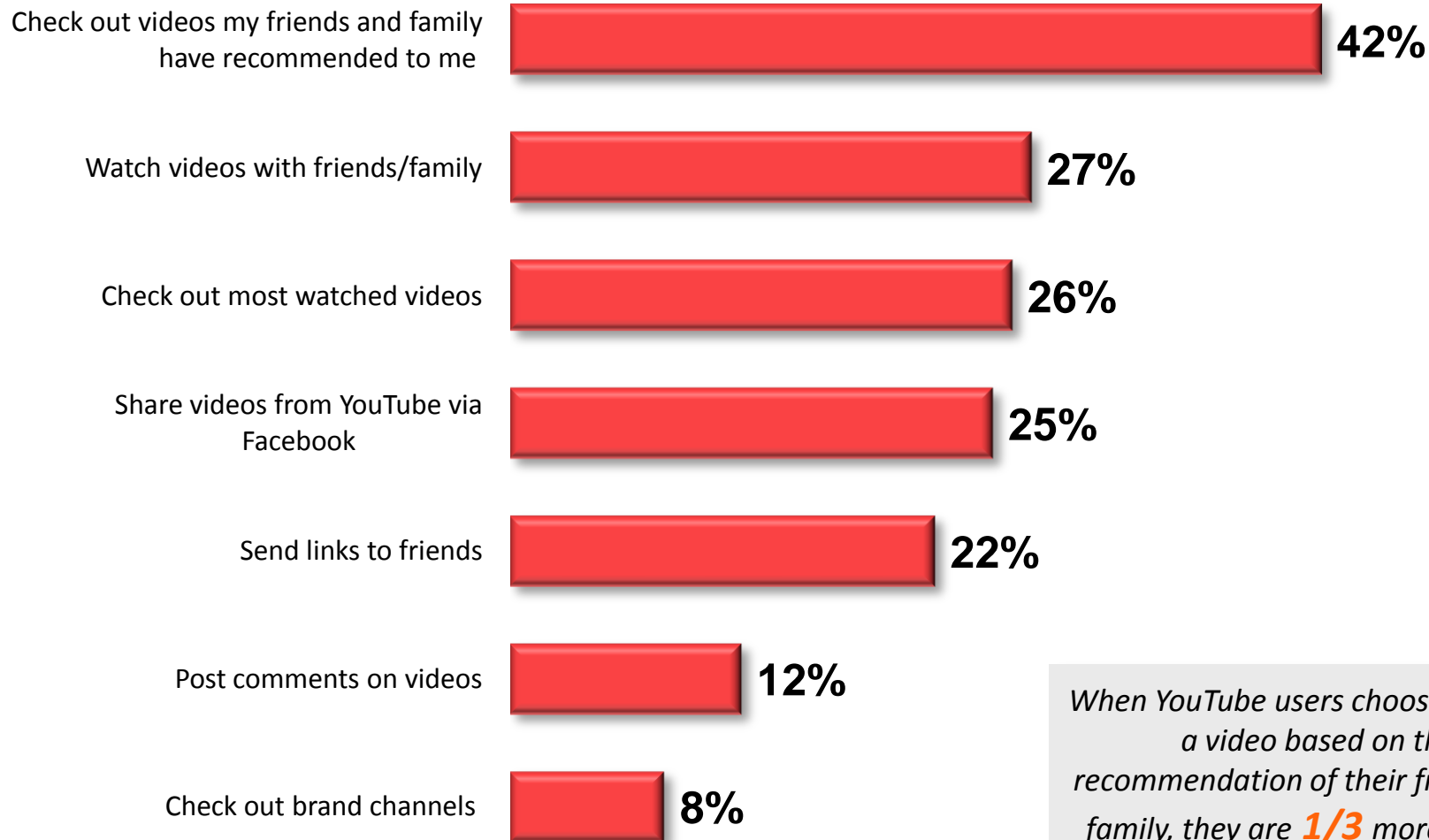
28% watching TV



**Users socialise on both sites,
although the types of activities
are different**



YouTube *What are they doing on YouTube?*



*When YouTube users choose to watch a video based on the recommendation of their friends and family, they are **1/3** more likely to go on to share the video with others*

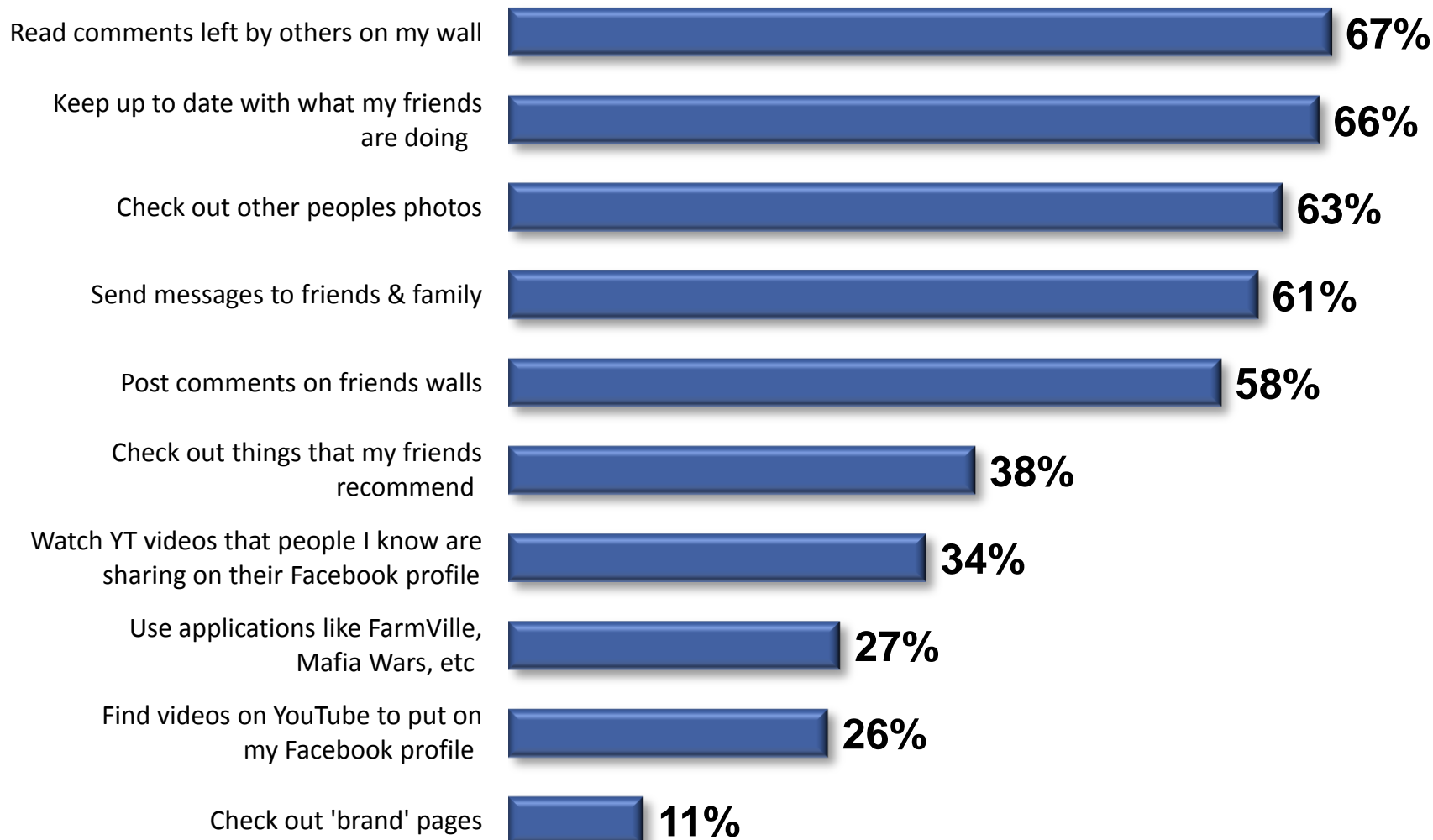
Q2aa. Sample = 3,000 respondents

Unsurprisingly, social activities predominate on Facebook



facebook

What are they doing on Facebook?



Q2aa. Sample = 3,000 respondents

Users upload 3-4 videos onto each site in a given week.

- However, less than 1% of users said this was for **'fun'** or **'pleasure'**
- Instead, they are driven by a desire both to **'impress their friends'** and of course to share videos with friends
- Users feel it is **more likely** that their immediate **friends will see** their videos on **Facebook**, but they are **more likely to upload videos to YouTube** if the videos relate to hobbies.
- **1/3 of users** to either site **specifically upload videos to share** with anyone who is interested, **even people they don't know.**



*Amongst Nat Rep Sample
Q2j. Sample = 3,000 respondents*

How do users feel when they use each site?



The trigger to visit each site is different



I have something specific in mind

I see what interests me when I get there

You Tube

68%

32%

facebook

37%

63%

Lighter users of both are the most likely to have something specific in mind whereas heavier users like to spend time browsing

France follows a similar pattern whereas in Germany users are more likely to visit Facebook with something specific in mind

Users cite both sites as a **break** from everyday life (**50%**), a way to **avoid boredom** (**45%**) and a **treat** (**39%**).

Facebook and YouTube also **help users** stay caught **up with new stuff** (**47%**) and to **feel adventurous** by trying new things (**16%**).

YouTube is seen as more of a **destination for fun/cheering yourself up**, where users are much more likely to visit **Facebook** to **feel connected to people**.

Interestingly, some **Facebook users** (**17%**) feel they have to log in to the site – either to keep in touch with friends and family or because they receive email notifications



What do users think about each site?



Facebook is my downtime and my partner can't stand that I'm on it so much.

Alexandra, France

I feel happy once I have gone onto YouTube... it cheers me up and puts me in a good mood.

Matthew, UK



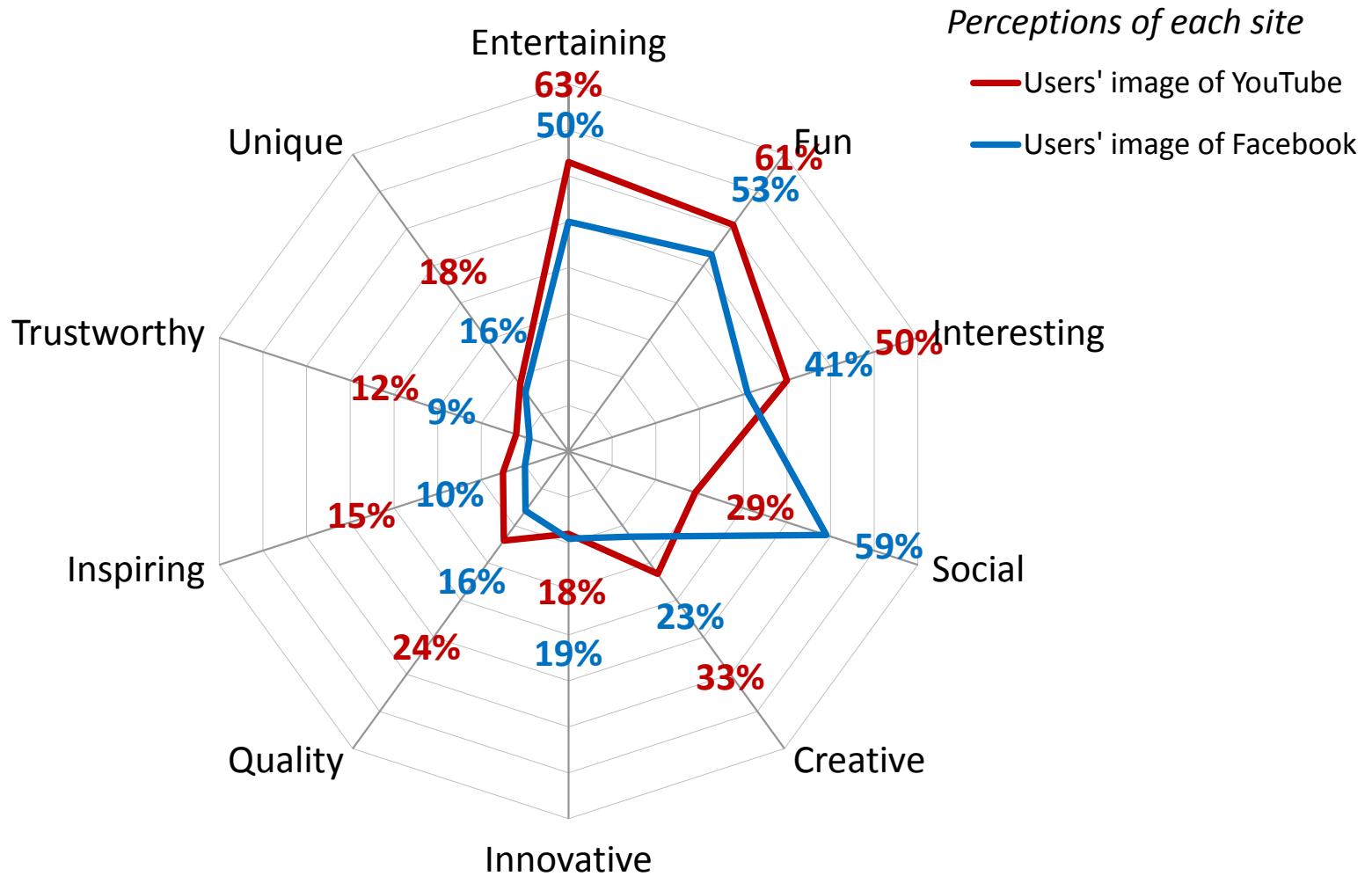
I use the internet at school for example, when the lesson is boring. I just pop onto Facebook and redirect myself. This isn't really OK but it stops me from getting bored.

Vanessa, DE

How do users describe each site?



'Entertaining', 'fun', 'interesting' are the common perceptions of YouTube. To a lesser degree these also hold true for Facebook, although 'social' is dominant



Q3. Sample = 3,000 respondents

1 in 2 believe



is a strong community, and

3 in 4 for





You Tube

“As for **YouTube**, my favourite time is in the **evening with my children**, even if I don't see what I want, it's **a moment of relaxation and sharing, of laughter**, we let off steam together. Whereas with **Facebook**, I prefer to use it when **I'm on my own**, it's **my own space** and for the moment **I can't do without it** even if at the end of the day, it doesn't serve any purpose!!!”

Alexandra, France



facebook

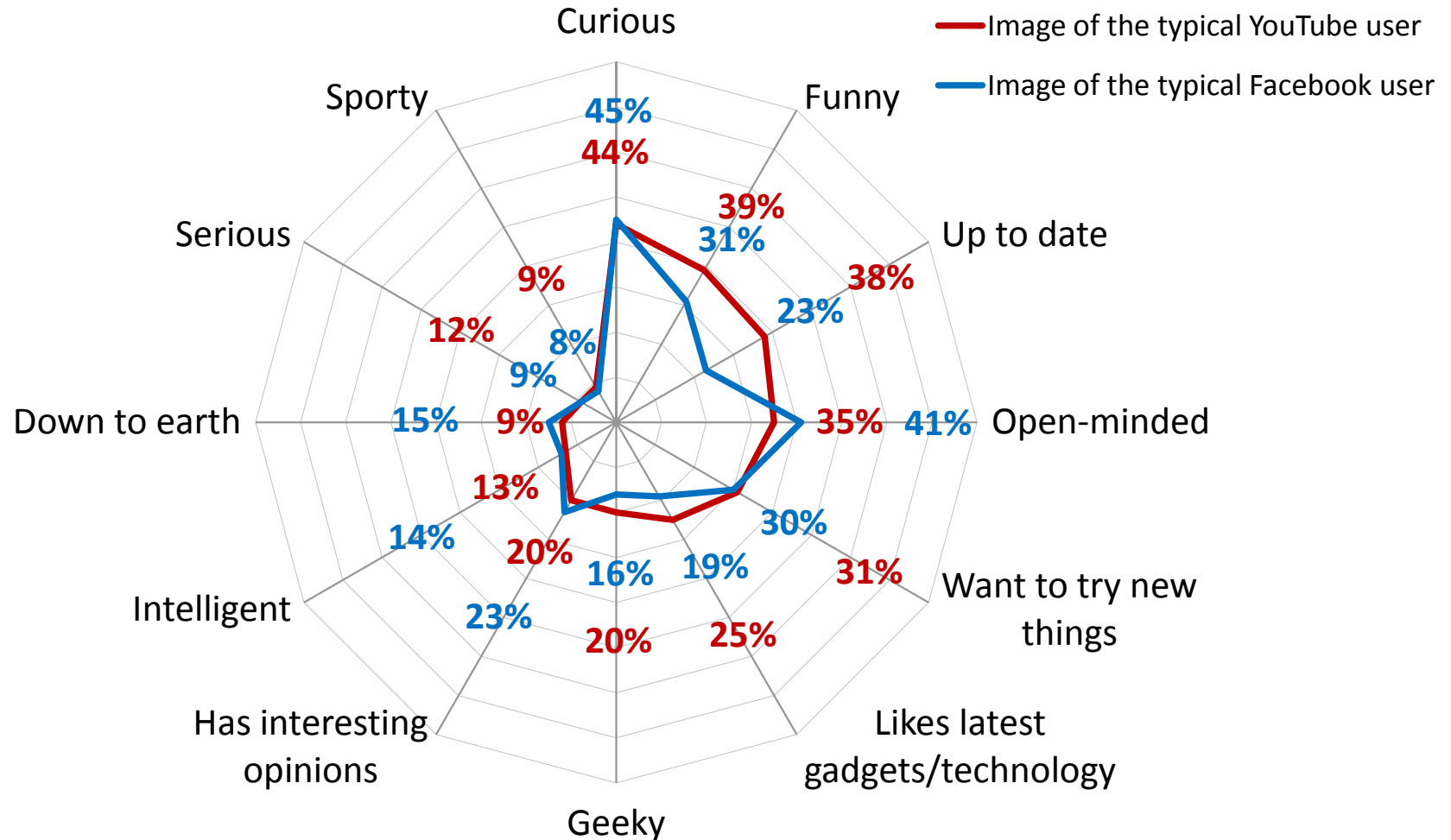
“I wouldn't like to have less time for **Facebook** because it is **important for me to read everything, to answer my mails there and comment on one another's status**. When there is **one place** where you get **really good gossip** it's **Facebook**, and especially as a girl I **don't want to miss out on that** 😊”

Vanessa, DE

Who do they think is the typical user of each site?



Users of both sites are seen as curious, but YouTube users are regarded as more funny and up to date, but a little 'geeky' in some cases



Q3. Sample = 3,000 respondents

How easy is it for brands to build relationships with users of each site?



46%

**think that Brand advertising
on YouTube is a good idea.**



45%

**think that Brand advertising
on Facebook is a good idea.**



1 in 2 users on each site think it's a good idea for brands to have their own pages there

Q7c. Sample = 3,000 respondents



I do expect all brands that you meet in daily life to have their own YouTube channel because they should not miss out on this opportunity. Also, in addition they have good commercials that you want to rewatch at home

Vanessa, DE

Facebook is, from my point of view, a messenger for brands as it's a community site where groups are set up for people who like holidays, or chocolate... as with a brand where you can sign up to its codes, its image, but be careful not to overdo it!!!

Alexandra, France

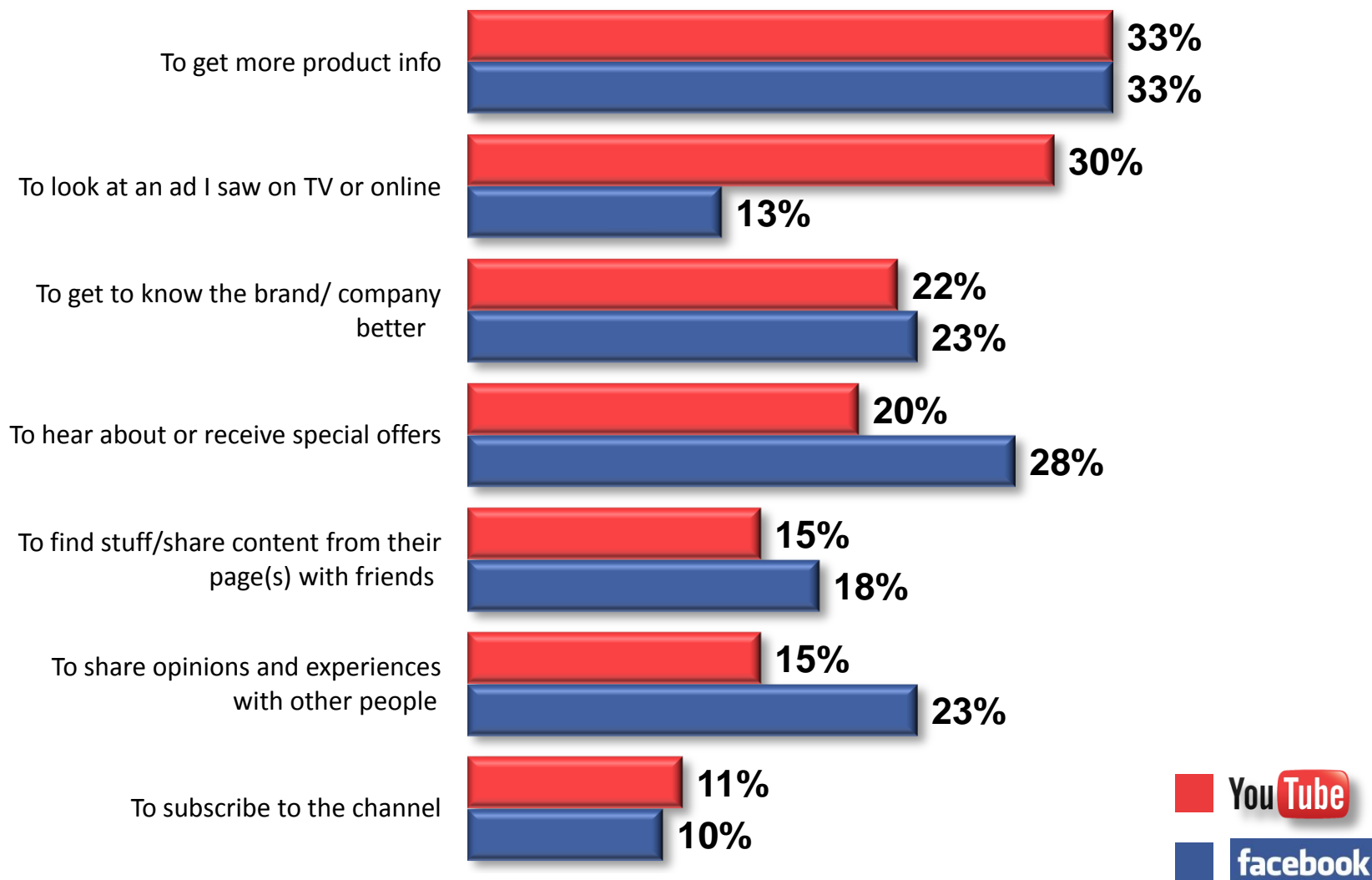


I think it's good that brands are advertising on sites like YouTube and Facebook. It shows that they understand their brands and their potential customers. Online is a much better medium as you can update and change information more quickly

Ian, UK



Why do they go to brand pages on each site?



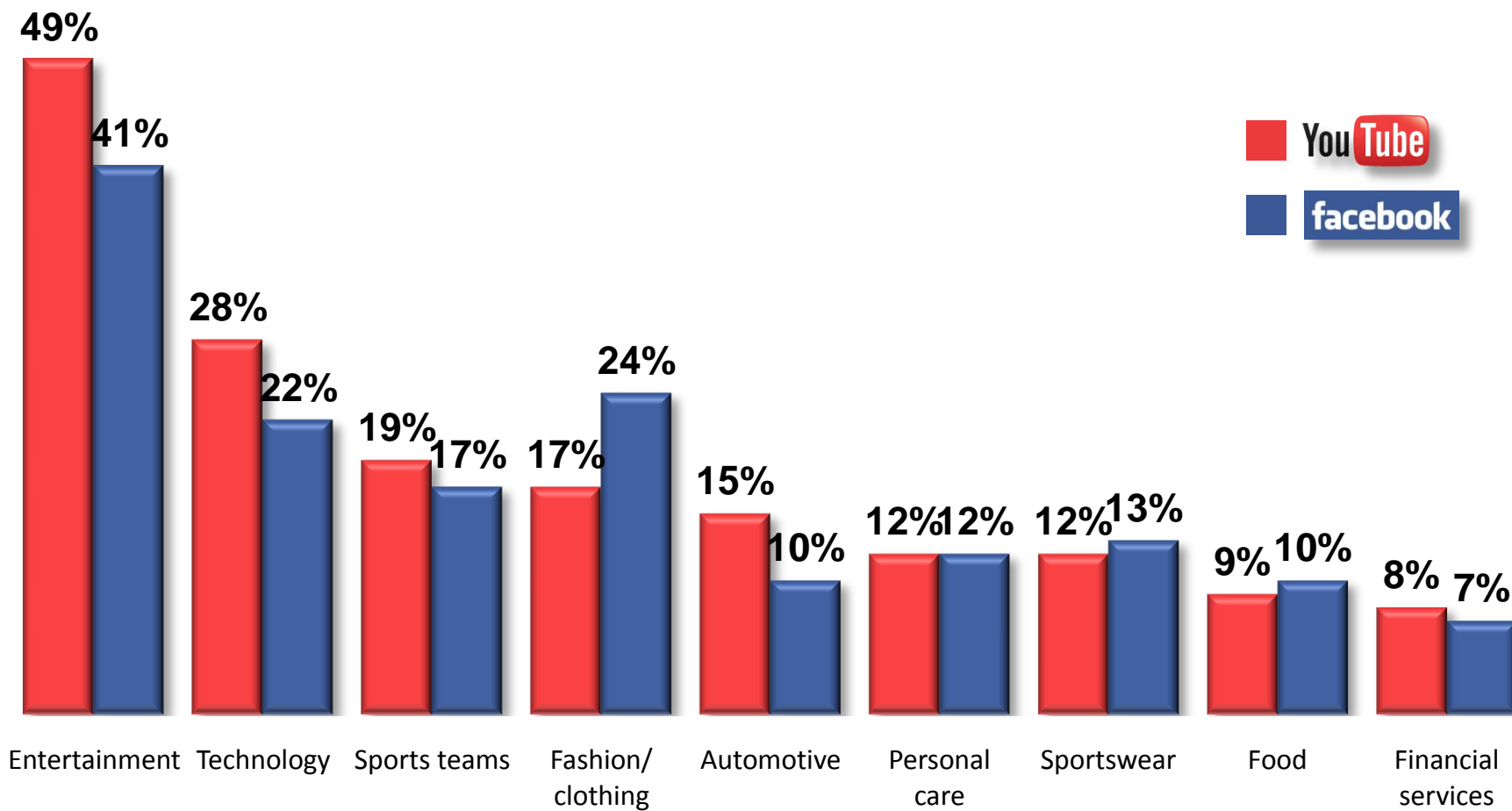
Q5c. Sample = 2,217 respondents who look at brand content on each site

Users who visit YouTube or Facebook brand pages specifically looking for product information are 50% more likely to share the information they find with their friends and family.



Which types of brand do they check out on each site?

Entertainment and technology brands are the most interesting on YouTube, whereas fashion brands are seen as a good match on Facebook.



Q5b. Sample = 2,217 respondents who look at brand content on each site

**How does brand interaction on
YouTube or Facebook impact on
how consumers see that brand?**



Many of the **strengths** of each site **transfer to the brands on the site** – with **brands on YouTube** seen as more **entertaining, fun, creative**; those on **Facebook** as more **social**.

Heavier users of **YouTube** and **Facebook** are the **most positive** about seeing brands on the site; and the most **likely to transfer the site's values** to the brand.



YouTube



facebook

Many users are not loyal to specific brands when it comes to 'liking' brands on Facebook and YouTube...

41% have 'liked' competitor brands on Facebook.



35% of YouTube users share content from competitor brands.

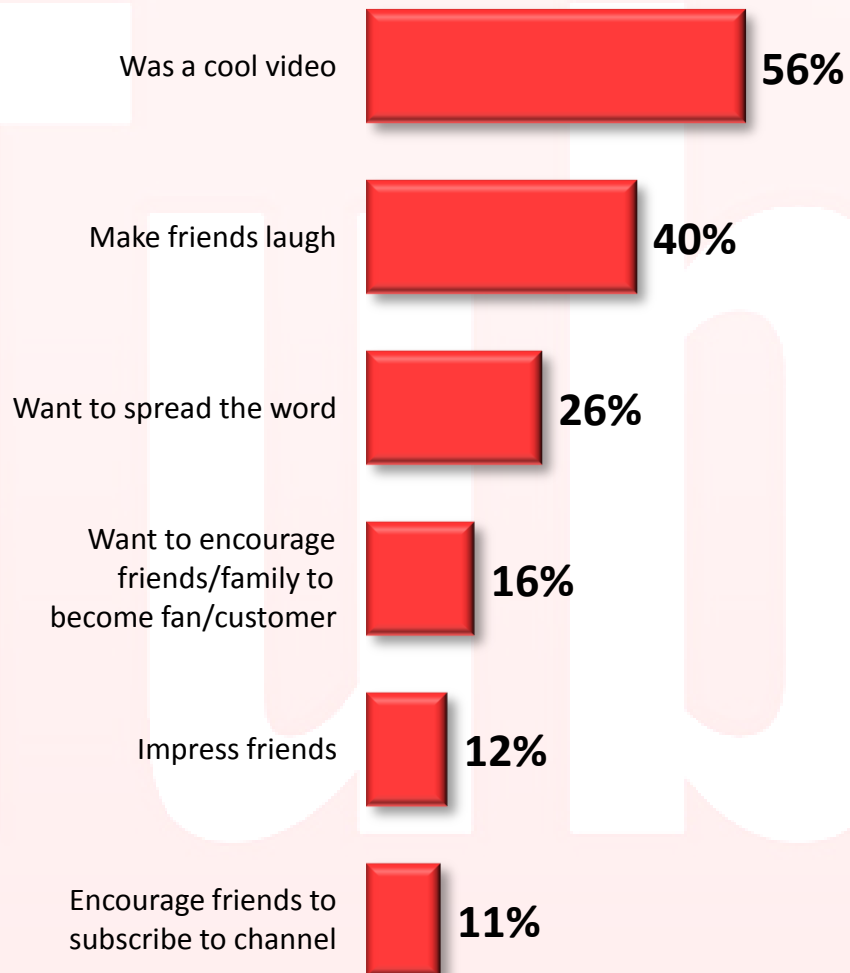
Q6d/Q6dd. Sample = 1,426 & 1,878 users of YouTube & Facebook respectively who have shared brand videos/'liked' a brand

Why do users Like or Share brands?



You Tube

Why share brand videos...



Q6bb. Sample = 1,426 users of YouTube who have shared brand videos

facebook

Why 'like' a brand...



Q6b. Sample = 1,878 users of Facebook respectively who have 'liked' a brand

How well do they know the brands that they check out on each site?

56% know well

60% know well

41% are a customer of

43% are a customer of

People are more familiar with the brands they like or share

70% know well

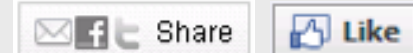
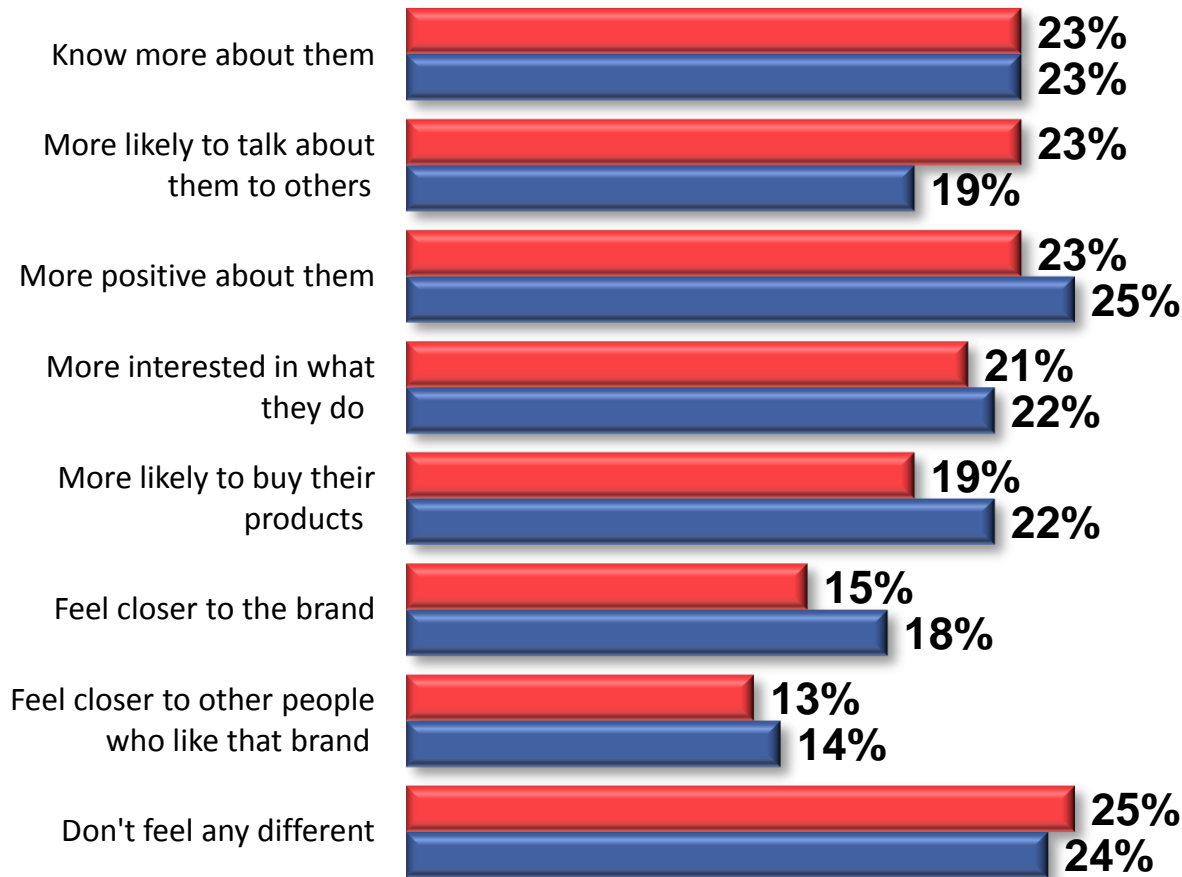
65% know well

42% are a customer of

40% are a customer of



How does it make them feel when they share a video from/'Like' a brand?



For **75%** of those doing this, it has a positive impact on how they regard the brand



When the recommendation is made by someone else (friends, family) the impact drops by **roughly half**.

Q6e/Q6ee. Sample = 1,426 & 1,878 users of YouTube & Facebook respectively who have shared brand videos/'liked' a brand

Recommendations



1

Planning and personality by association.

Advertising in social spaces requires as much planning as traditional online display, via tools such as UKOM.

But with social you need to understand the personality of the site to ensure that 'halo' effect of being associated with it.



2

Create content to give consumers prestige.

Users of social media are more likely to share content that impresses their friends. Creatively, think less about your brand and more about the prestige and KUDOS you can give consumers, such as entertainment, money off or exclusive information.



3

Develop a clear call to action

It's important for consumers to know why you're in social media in the first place. The space is noisy and competitive – for example 41% of people liked competitor brands on Facebook. To set yourself apart and reap the rewards from your social activity, make your reasons obvious - consider a sales message or call to action.



BUY ME HERE

Thanks

