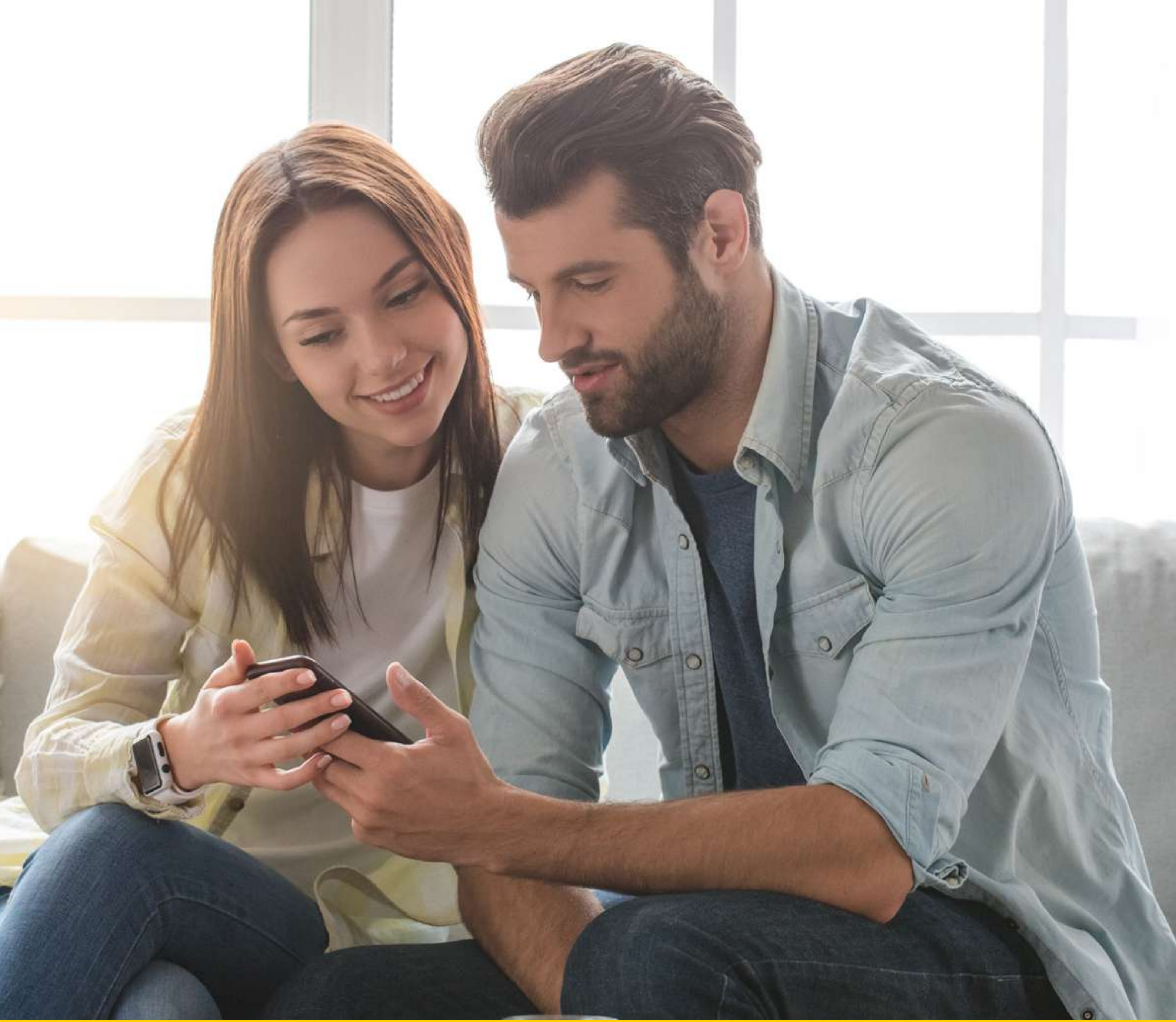


Yellow Social Media Report 2018.

Part One – Consumers.

Table of Contents.

Foreword.

Did you know the first thing nearly sixty per cent of Australians do every day is connect through social media? It's how they finish their day, too.

Welcome to the 2018 Yellow Social Media Report.

At Yellow, we're curious about the way people use social media to engage with their world. The rich insights we've uncovered in more than seven years of reporting on social media use by both consumers and businesses means we understand what connects people online.

This year, we've split the report into two parts. The first brings you insights into consumer social media behaviour, the technology and platforms people are using, and when and why they're connecting. The business report will be released shortly, taking a look at how businesses use social media channels and identifying ways to enhance your marketing and win new business.

Sixty-two per cent of Australians use social media sites each day. More of us than ever before have a social media profile and our number one reason for being online is to stay connected with family and friends.

We're spending on average 10 hours a week on Facebook, the most popular social platform. Next most popular is YouTube, then Instagram.

A growing number of people use reviews and offers online before choosing which business to buy from. So understanding how consumers engage on social is critical to any business marketing strategy.

The good news is our behaviour on social media is pretty consistent when it comes to the way we engage with brands and businesses. More than 50% of social media users say they are more likely to trust brands that interact positively with customers on social media, make engaging and relevant content, and update frequently.

Just a year ago, less than 25% of people followed businesses or brands on social media. Now that number has leapt to 44%. Forty-four per cent of us are now following businesses or brands on social media. It's no wonder the proportion of businesses with a social media presence is at an all-time high. It's a missed opportunity if you either aren't on social media, or aren't using the channel effectively.

If a business knows exactly who their customers are, what's important to them, and where they search for information before they buy, then it becomes easier to provide the right content to them and build authentic connections.

At Yellow, it's our business to navigate the rapidly evolving social media landscape and keep helping businesses connect with customers, as we have done for over a century.

I hope you enjoy unpacking the behavioural insights in this report as much as I did.

James Ciuffetelli
Executive General Manager Yellow

Executive summary.

About this Yellow Social Media Report – Consumer Survey.

The Yellow Social Media Report contains the results of research which commenced in 2011 surveying Australian consumers and businesses on how social media channels are being used.

These findings help Australian businesses stay connected with consumer social media trends. Yellow, as a market leader in providing social media services to Australian businesses large and small, is a part of the Sensis family and we have changed the name of the report in recognition of their expertise.

This year, the report has been released in two parts, with this edition focusing on the results of the consumer survey. A second report features the business survey results.

1,516 Australian consumers were sampled this year, with the survey shifting from a telephone to online methodology and the target sample size increasing from 800 to 1,516.

The changed consumer survey methodology prevents us making definitive comparisons with prior results, but provides stronger analysis power and ability to compare segments. However, most of the latest consumer survey results do not vary significantly from the 2017 observations.

For the purposes of this report, the term social media refers to:

- Social networking websites such as Facebook, Google+, LinkedIn, Twitter, Instagram
- Online blogs and online rating and review mechanisms

The findings detailed in this report aim to help Australian businesses to make more informed decisions about how to use these channels to engage with consumers.

Australians and social media.

Sixty percent of Australians use the internet more than five times a day. The average number of internet-enabled devices owned is 3.5.

Smartphone penetration is 87% which compares with 76% for laptops, 59% for tablets and 52% for desktop computers. Other devices have minority ownership although nearly half those sampled have an internet-enabled TV (45%). The penetration of devices such as the iPod touch and wearable devices are 11% and 21% respectively.

The main barrier to social media use is lack of interest or appeal followed by security and privacy concerns. Our sample this year was of internet users and 88% have a social media profile. More than six in ten (62%) use social media sites daily with 34% checking in more than five times a day. The two most popular times for social networking are in the evening (61%) and first thing in the morning (59%).

60% of Australians use the internet more than five times a day and we own an average of 3.5 internet-enabled devices

On average, social media users mentioned four reasons for social networking. The top four are to catch up with family and friends (85%), to share photos or videos (46%), for news and current affairs (36%) and to watch videos (32%).

Smartphones (74%) stand out among devices used for accessing social media, but laptops (49%), desktops (35%) and tablets (35%) are not unpopular. An app is used almost twice as much as a website for accessing social media (82% to 43%).

Nearly all social media users access it at home (94%) with the lounge or living room (78%) and the bedroom (58%) being the two most popular areas of the house where people use it. The toilet was mentioned by 20%. Almost two thirds use social media while watching TV and this occurs across a range of genres with news, current affairs and reality shows mentioned most. Almost one in three discuss the program on social media whilst viewing. Only 5% primarily watch free-to-air TV replays via social media.

Outside the home, the most popular location for accessing social media is at work (35%) with use on public transport (32%) almost as common. Among those who are in the workforce, 54% use social media at work. Usage in the car (23%) and restaurants, bars or parties (25%) is not uncommon. Nor is checking social media while eating a meal with family or friends (23%).

More than nine in ten (91%) social media users are on Facebook, accessing the site 37 times a week for 16 minutes each time on average. This translates into an average of nearly 10 hours a week on Facebook (same as indicated in the 2017 survey). The average number of Facebook friends is 239 (was 234 in 2017).

Facebook Messenger is used by 79% of social media users, 28% have used Facebook Live to watch live or recently recorded videos with 9% publishing their own live video. Forty-four percent have published videos or pictures via the story function on Facebook (35%), Snapchat (16%) or Instagram (16%).

Executive summary.

YouTube is the second most popular social media site with usage at 53% ahead of Instagram (39%), Snapchat (23%), LinkedIn (22%), Pinterest (22%), Twitter (19%) and Google+ (13%).

Twitter appears to be losing appeal. 17% stopped using at least one social media site in the last year with Twitter (31%) mentioned most of all. (In 2017, Twitter's penetration was 32%).

Users of Instagram and Snapchat access these sites almost as much as Facebook users access that site – respectively 33 and 36 times weekly on average. Instagram users have many more friends, contacts or followers than Snapchat users - 241 on average compared to 93. However, they spend similar amounts of time on each, averaging 13 and 12 minutes respectively per usage occasion.

Among social media users, we found 29% spending more time on this behaviour in the past year against 17% reducing their time spent on social media. Over a third (36%) feel they spend too much time on social media and 22% expect to decrease this activity in the next year.

Social media consumers are inclined to believe it impacts negatively on their privacy, sleeping, concentration, productivity, patience, grammar and spelling. On the other hand, they tend to view social media as impacting positively on their connectedness to others, relaxation and downtime, and personal relationships. Three in ten admit being excited when one of their posts received more likes than usual.

Among parents with children or teens at home, 61% have placed restrictions on their social media use, most commonly relating to how much time and when its use is allowed.

Bullying or harassment on social media has been witnessed by 25% of the consumers surveyed and 14% claim to have experienced this themselves. Twenty percent have posted something they later regretted while 15% are worried their social media footprint might one day come back to haunt them.

Just over one third (35%) of social media users support topical issues or events or contribute to public dialogue on them through this forum. The main motivations are because social media is an easy way to show support, feeling passionate about the issue concerned and to make their voice heard.

73% of us trust traditional media for our news over social media (16%) or posts from family and friends (11%)

Traditional media is a much more trusted source for news than social media or posts from family or friends about what is happening (73% vs 16% vs 11% respectively).

Twenty-three percent use social media for retail research. Items most likely to be researched via social media are movies / TV shows (66%), holidays / travel / accommodation (65%), entertainment (63%) and clothing / fashion items (60%). On the last occasion such research occurred, in over half the cases it led to a purchase (59%), typically via an online transaction (76%).

The proportion claiming to follow a social media group associated with a brand or business is 44% while 18% have stopped following a company or brand in the last 3 months. Users of Instagram (44%) and Facebook (39%) are similar in their likelihood of following brands or businesses on those platforms. The types of brands or businesses most likely to be followed operate in the fields of holidays / travel / accommodation, entertainment, music and movies / TV shows. The benefits most desired by those who follow brands or businesses are discounts (62%) and give-aways (51%).

More than half the consumers using social media are more likely to trust brands that interact with customers in a positive way on that forum (54%), regularly update their content (54%) and have engaging and relevant content (55%). The main reasons people have ceased following a brand or business in recent times are irrelevant, unappealing or excessive content and too many ads.

Executive summary.

Attitudes towards businesses advertising on social media tend to be more negative than positive but many consumers are neutral. For instance, 22% are happy to see ads on social network sites with 44% neutral. More than one third (36%) of social media users admit sometimes clicking on ads they see on a site to find out more with 26% neutral on this dimension. Just over one in five (21%) like sponsored posts from businesses they follow on social media and 47% are neutral. One in three say they will inspect a brand's social media presence before making an online purchase if they have not purchased from their website before with 39% in the neutral camp. If we take those neutral views into account, negative opinions of social media advertising or sponsorship are in the minority on the dimensions measured which augers well for its use as a marketing tool for brands.

Over two-thirds of consumers read online reviews and blogs (68%) averaging eight before making a purchase decision. We found 43% have posted an online review or blog, averaging six posts in the last year. Holidays / travel / accommodation feature more heavily in the posts than other categories. Only 24% of those who post reviews or blogs online reject the possibility of changing their opinion of a supplier who got back to them after they had posted a negative review.

Almost half of the social media users have provided online ratings in the past year (45%) with the average number of ratings being eight. Suppliers of holidays / travel / accommodation have been the recipient of ratings much more than other product or service providers.

For a more in-depth analysis of how Australian businesses use social media see Part Two of the Yellow Social Media Report 2018.

Facebook is again the preferred channel for SMBs and large businesses advertising on social media. Around nine in ten have advertised on Facebook. The next most popular platform used for advertising has been Instagram – by 10% of small businesses,

68% of us read online reviews and blogs before shopping, averaging eight reviews before making a decision

22% of medium businesses and 30% of large businesses. Most businesses believe their social media advertising has been effective across all platforms used.

In line with prior findings, only a minority of small (21%), medium (32%) and large businesses (35%) measure their return on investment (ROI) on social media. Response numbers, asking customers and new sales are the main ways in which businesses of all sizes measure their social media ROI. The average estimates for ROI on social media are 24% for small and large firms and 19% for medium-size firms. Across the board, the key measures of their social media success continue to be the number of likes, followers and subscribers and the sales, revenue and profits.

Very few businesses expect to reduce their social media expenditure in the coming 12 months. Among those who foresee a change in their social media spend, it is much more likely to be an increase than a decrease. SMBs expecting to spend more on social media in the coming year appear less likely to fund it by decreasing their expenditure in other marketing or advertising activities, in contrast to the large businesses. Where increased social media expenditure is likely to be funded by sacrificing spend elsewhere, print advertising was nominated most of all.

Methodology.

This report contains the results of research conducted by Di Marzio Research and TKW with the public from March 1 to April 5, 2018.

Consumer survey.

Previously, this research consisted of a telephone survey with 800 randomly selected adult Australians but in 2018 an online methodology was adopted to enable the sample target to be increased to 1,500. This change took place primarily to allow greater analysis scope and more meaningful comparisons between locations and demographic segments. Other factors influencing this change included the ability to now sample consumers effectively via an online approach, which was also deemed suitable because social media use is an online activity. However, this means direct comparisons with past results are not possible although we do include some of the 2017 survey results for perspective.

As in prior surveys, quotas were applied to suitably represent each age group as well as by gender and location to ensure coverage across metropolitan and regional areas in each state and territory. The fieldwork was organised by TKW with the consumer sample panel supplier being Research Now. Data was weighted by age, gender and location, so the sample is reflective of the Australian adult population. Sample sizes by age and gender are shown below.

State	Sample #
NSW	313
VIC	282
QLD	203
SA	182
WA	183
TAS	152
NT	101
ACT	100
TOTAL	**1,516**

Gender*	Sample #
Males	757
Females	755
Age	
18 to 29	296
30 to 39	303
40 to 49	304
50 to 64	309
65 plus	304
TOTAL	**1,516**

Notes: 1. 20 interviews in the NT were conducted by telephone because the quota there could not be met fully by online interviewing 2. *4 respondents did not identify as male or female.

Device ownership.

On average, online consumers own 3.5 internet enabled devices. Smartphones are the most popular, used by almost nine in ten adults. A majority also have laptops (76%), tablets (59%) or desktops (52%). Internet-enabled TVs are found in more than four in ten households (45%) while just over one in five consumers (21%) has a wearable device like an Apple Watch or Fit-Bit. The tables overleaf also reveal that:

- Smartphone penetration does not differ much by gender and only in the NT (74%) and 65 plus age group (70%) is it clearly below the national average, although most have one. Between 86% and 94% of those aged under 65 have a smartphone.
- In all age groups, a majority own a laptop ranging from 63% of the 65 plus age group to over 80% in the under 40s. Gender differences are insignificant for this device and by location, only in SA (63%) is penetration well below average.
- Tablets hold more appeal to females than males (63% to 56%) with penetration below average in the 65 plus segment (45%). By location, it ranges from 51% in SA to 66% in the ACT.
- Desktops are more popular with males than females (60% to 45%) and penetration rises through the age groups (from 44% in the 18-24 age group to 62% in the 65 plus segment). Desktops are most commonly found in SA households (64%).
- Internet-enabled TVs have been taken up by more males than females (47% to 42%) and in the under 50 age groups (around 50% compared to 40% of 50-64s and 33% in the 65 plus group). By location, below average penetration occurs in the NT (33%) and regional/rural areas (39%).
- Incidence of devices such as the iPod Touch, Apple Watch and Fit-Bit appears to be lower among the over 40s and in SA, WA and the NT than in other age groups or locations.
- Ownership incidences discovered in the 2017 telephone survey were – smartphone (81%), laptop (59%), desktop (51%), tablet (45%), internet TV (28%), iPod Touch (14%), wearable device (10%).

One in five consumers has a wearable device like an Apple Watch or Fit-Bit

Device ownership	Total Sample (1516) %	Gender		Age				
		Male (757) %	Female (755)%	18-29 (296) %	30-39 (303) %	40-49 (304) %	50-64 (309) %	65+ (304) %
Laptop	**76**	75	76	81	86	78	71	63
Smartphone	**87**	86	89	94	92	92	86	70
iPad / tablet	**59**	56	63	61	66	68	57	45
Desktop	**52**	60	45	44	47	51	57	62
Internet-enabled TV	**45**	47	42	50	52	48	40	33
iPod Touch or similar device	**11**	10	12	15	17	10	9	4
Wearable device like Apple Watch or Fit-Bit	**21**	19	22	27	30	22	15	11

Device ownership	NSW (313) %	VIC (282) %	QLD (203) %	SA (182) %	WA (183) %	TAS (152) %	NT (101) %	ACT (100) %	Metro (1014) %	Regional (502) %
Laptop	77	79	75	63	74	76	80	78	78	72
Smartphone	88	88	91	80	83	86	74	91	89	84
iPad / tablet	61	59	57	51	62	64	61	66	61	57
Desktop	50	49	58	64	46	50	48	57	53	51
Internet-enabled TV	47	45	43	41	43	48	33	40	47	39
iPod Touch or similar device	13	11	10	7	7	10	11	14	11	11
Wearable device like Apple Watch or Fit-Bit	20	24	22	13	18	26	18	29	23	16

Q1a. Which of the following do you own? **Notes:** 1. <1% = less than 1%. 2. Sample size shown in brackets.

Internet access.

A clear majority access the internet at least five times a day, although this level of usage decreases with age and is a little more likely among females. However, regardless of gender, age group and location, daily internet use exceeds 80%.

Although we cannot make direct comparisons with earlier surveys, because of the shift from a telephone to online methodology, these results are consistent with prior findings.

Frequency of internet use	Total Sample (1516) %	Male (757) %	Female (755) %	18-29 (296) %	30-39 (303) %	40-49 (304) %	50-64 (309) %	65+ (304) %
5+ times a day	**60**	58	62	76	72	68	52	32
1-4 times a day	**27**	29	25	16	18	20	33	50
4-6 days a week	**9**	9	10	5	7	8	12	15
2-4 days a week	**2**	3	2	3	2	2	0	1
About once a week	**1**	1	1	<1	1	2	0	1
Less often	**1**	1	1	<1	1	1	1	0

Frequency of internet use	NSW (313) %	VIC (282) %	QLD (203) %	SA (182) %	WA (183) %	TAS (152) %	NT (101) %	ACT (100) %	Metro (1014) %	Regional (502) %
5+ times a day	67	54	62	53	56	65	53	63	63	55
1-4 times a day	21	29	27	34	33	26	38	29	25	31
4-6 days a week)	7	14	7	11	10	8	7	7	9	10
2-4 days a week	4	3	<1	2	1	0	3	1	2	2
About once a week	<1	1	1	1	1	1	0	0	1	1
Less often	1	0	2	0	<1	<1	0	0	<1	1

Q1a. How often, if at all, do you access the Internet – either on a computer or on your mobile phone or other devices such as an iPad or iPod Touch?
Notes: 1. <1% = less than 1% and rounding occurs.

Frequency of internet use does not differ markedly according to device owned although this is not surprising given that the average number of internet-enabled devices owned exceeds three, which increases the ability to undertake this behaviour.

Device ownership	Access internet 5+ times a day %
Laptop	**65**
Smartphone	**64**
iPad / tablet	**68**
Desktop	**60**
Internet-enabled TV	**69**
iPod Touch or similar device	**69**
Wearable device like Apple Watch or Fit-Bit	**70**

Q1b. How often, if at all, do you access the Internet – either on a computer or on your mobile phone or other devices such as an iPad or iPod Touch?

Social media site usage.

Eighty-eight per cent of online consumers use social media sites. (The telephone survey incidence discovered last year was 79% and 69% in 2016).

Many consumers are frequent users with more than one third (34%) accessing social media sites over five times a day and 62% doing so daily.

Usage and frequency of using social media sites declines with age but is also quite common in the older age groups. Females are more frequent users than males – 41% compared with 26% respectively accessing social media more than five times a day.

These results are in line with the telephone survey findings of last year when we found 59% of social media users accessing such sites 5 or more times a day, and an inverse relationship between frequency of use and age group.

Frequency of using social networking sites	Total Sample (1516) %	Male (757) %	Female (755) %	18-29 (296) %	30-39 (303) %	40-49 (304) %	50-64 (309) %	65+ (304) %
More than 5 times a day	**34**	26	41	55	52	38	19	6
Every day (1-4 times)	**28**	27	28	26	27	31	30	24
Most days	**13**	13	13	11	11	13	15	13
A few times a week	**7**	8	5	4	4	3	12	11
About once a week	**3**	4	3	1	2	5	4	6
Less often	**4**	6	2	1	1	4	6	7
Never	**12**	16	8	2	4	6	15	33

Across the states and territories, usage is highest in Queensland followed by NSW and it is lowest in SA. Frequency of use is greatest in Tasmania with 42% of consumers in that state accessing social media sites more than five times a day.

Frequency of visiting sites	NSW (313) %	VIC (282) %	QLD (203) %	SA (182) %	WA (183) %	TAS (152) %	NT (101) %	ACT (100) %	Metro (1014) %	Regional (502) %
More than 5 times a day	37	37	32	19	29	42	25	28	36	30
Every day (1-4 times)	27	21	35	29	29	25	27	34	27	30
Most days	14	16	10	11	10	7	16	13	13	13
A few times a week	6	5	9	7	9	4	4	5	6	8
About once a week	3	3	2	8	4	7	4	1	4	3
Less often	4	4	2	3	6	3	5	5	4	3
Never	9	14	8	23	13	12	18	14	10	15

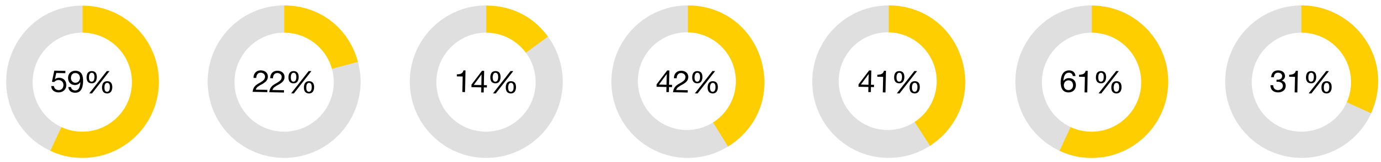
Q1b. How often, if at all, do you use social networking sites such as Facebook, Twitter, MySpace or LinkedIn?
Notes: 1. <1% = less than 1% and rounding occurs. 2. Sample size shown in brackets.

Social media usage by time of day.

The two most popular times for social media use during the day are in the evening and first thing in the morning. This was also the case in the 2017 telephone survey. Around six in ten users access social media sites at those times. Lunchtime and breaks are the next most popular times with just over four in ten consumers keen on those periods. Almost one in three use social media 'last thing before bed' and just over one in five while commuting. Fourteen percent access social media sites during work.

First thing in the morning is the most popular time for social media usage among females in the 18-29, 30-39 and 65 plus age groups. Evening is the most popular time for males in the 40-49 and 50-64 age groups. Social media use when commuting, working, at lunchtime or during breaks is inversely related with age.

Social media usage by time of day.



First thing in the morning | Commuting | When working | Breaks | Lunchtime | In the evening | Last thing before I go to bed

When we use social media	Total Sample (1516) %	Male (757) %	Female (755) %	18-29 (296) %	30-39 (303) %	40-49 (304) %	50-64 (309) %	65+ (304) %
First thing in the morning	**59**	52	65	68	67	50	53	58
Commuting	**22**	25	20	37	32	23	10	2
When working	**14**	15	14	23	17	14	9	3
Breaks	**42**	43	40	55	51	50	28	15
Lunchtime	**41**	40	41	53	46	43	31	23
In the evening	**61**	62	60	60	62	65	69	44
Last thing before I go to bed	**31**	27	34	44	35	30	22	14

When we use social media	NSW %	VIC %	QLD %	SA %	WA %	TAS %	NT %	ACT %	Metro %	Regional %
First thing in the morning	64	56	63	51	53	62	42	48	57	63
Commuting	27	31	15	12	14	13	6	10	27	12
When working	16	17	12	10	10	15	9	8	16	10
Breaks	45	48	38	32	34	33	33	32	45	34
Lunchtime	44	49	35	32	32	28	23	25	44	33
In the evening	59	63	63	59	60	63	64	61	62	59
Last thing before I go to bed	31	37	30	25	24	26	21	17	30	31

Q2b. When do you most commonly look at your social networking sites? **Notes:** 1. Asked only of those who use social media. 2. Multiple responses allowed. 3. SM = social media.

Evening use is the most favoured time in most locations, followed by first thing in the morning

Reasons for not using social media.

Lack of interest or appeal is the primary barrier to social media use (also the case in prior telephone surveys). Security or privacy concerns is the next most influential barrier.

Reasons for not using social media	Don't use SM (195) %
Not interested or doesn't appeal	49
Security or privacy concerns	24
Too time consuming or not enough time	11
Don't like to tell people about myself	7
Don't agree with or believe in them	7
Don't know how or not computer savvy	2
Prefer face to face social interaction	2
Prefer phone to talk to friends	<1
Prefer email to communicate	<1

Q3a. Why don't you use social networking sites? **Notes:** 1. Asked only of those who don't use social media. 2. <1 = less than 1%. 3. Multiple responses allowed.

Social networking sites used.

Facebook is the dominant platform with 91% of social media users maintaining a Facebook profile. Facebook is used by close to, or over, 90% across the gender and age divide (which was also observed in the 2017 telephone survey).

Slightly more than half the consumers use YouTube, but its appeal declines with age and over twice as many 18-29s use this platform than the 65 plus cohort. YouTube is favoured more by males than females.

Platforms other than Facebook and YouTube have minority appeal with Instagram (39%) ahead of Snapchat (23%), LinkedIn (22%) and Pinterest (22%) in attracting users. Instagram, Snapchat and Pinterest are more popular with females than males while the opposite is true about Twitter and LinkedIn. These five platforms tend to lose appeal up the age scale with above average use seen in the under 40s and below average use in the 50 plus age groups. Google+ (13%), Tumblr (5%), Tinder (3%) and Vine (2%) are the least popular sites.

Social networking sites used	**Use SM (1321) %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Facebook	**91**	88	94	93	93	91	90	91
YouTube	**53**	56	50	65	60	54	46	32
Instagram	**39**	34	44	66	53	38	16	11
Snapchat	**23**	17	28	49	30	15	7	1
Twitter	**19**	26	13	21	25	22	14	10
LinkedIn	**22**	28	17	25	24	24	19	16
Tumblr	**5**	7	3	12	5	4	1	1
Pinterest	**22**	11	31	27	28	26	12	14
Google's social site Google+	**13**	14	13	15	18	16	10	6
Vine	**2**	2	1	5	1	2	0	0
Tinder	**3**	3	3	6	3	3	1	0

Social networking sites used.

Facebook has a dominant and similar level of appeal in all locations while YouTube has above average appeal in NSW, Victoria and metropolitan areas.

We find that metropolitan areas also display a greater liking for Instagram, Twitter, LinkedIn and Google + than regional/rural areas.

Some major variations between states and territories are also evident. Instagram's appeal ranges from 19% in SA to 48% in NSW. Snapchat is most popular in Victoria (27%) and least popular in SA (10%). Pinterest struggles to attract consumers in SA (9%) more than elsewhere with its strongest share being in Queensland (27%). LinkedIn's appeal varies from 6% in Tasmania to 28% in the ACT, while Twitter has above average appeal only in the ACT (25%) and NSW (23%). Google+ has attracted the fewest users in WA and the ACT (6% in each) and the most users in Victoria (16%).

Social media sites used	NSW (288) %	VIC (241) %	QLD (188) %	SA (141) %	WA (159) %	TAS (132) %	NT (85) %	ACT (87) %	Metro (896) %	Regional (425) %
Facebook	91	89	92	93	94	95	95	94	90	94
YouTube	57	62	47	41	44	45	44	46	56	46
Instagram	42	48	40	19	23	36	24	25	44	29
Snapchat	25	27	23	10	14	25	13	11	24	21
Twitter	23	19	16	17	16	16	12	25	21	14
LinkedIn	24	25	22	10	19	6	18	28	27	11
Tumblr	6	7	3	4	3	2	2	5	5	4
Pinterest	20	25	27	9	18	19	20	22	21	23
Google+	15	16	14	11	6	9	10	6	15	9
Vine	1	4	2	1	0	<1	0	1	3	1
Tinder	3	2	1	2	1	<1	3	3	2	2

Q2c. Which of these social networking sites do you use? **Notes:** 1. Asked only of those who use social media. 2. Multiple responses allowed.

Messaging services used.

We see below that 88% of social media users claim to use messaging services with Facebook Messenger (79%) a much more widely favoured option than WhatsApp (34%) And Viber (15%). (In last year's telephone survey we also discovered 88% using such services, with 81% being Facebook Messenger users). Facebook Messenger is the leading service across the board although attracting more females than males and fewer users up the age scale. WhatsApp also loses appeal with age but is favoured by more males than females, which is also true about Viber.

Social networking sites used.

79%	**Facebook Messenger**
34%	WhatsApp
15%	Viber
12%	None
6%	Others

Messaging services used	**Use SM (1321) %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Facebook Messenger	**79**	72	86	89	84	80	76	59
WhatsApp	**34**	38	30	45	41	37	24	16
Viber	**15**	17	12	17	21	11	16	5
Others	**6**	7	5	7	8	5	4	6
None	**12**	16	8	5	3	8	17	31
Use any messaging service	**88**	84	92	95	97	92	83	69

Social networking sites used	**NSW (288) %**	**VIC (241) %**	**QLD (188) %**	**SA (141) %**	**WA (159) %**	**TAS (132) %**	**NT (85) %**	**ACT (87) %**	**Metro (896) %**	**Regional (425) %**
Facebook Messenger	77	81	82	76	79	89	76	73	78	82
WhatsApp	45	38	21	13	30	27	18	32	42	15
Viber	17	17	11	5	15	8	12	13	18	7
Others	6	7	5	7	6	4	5	6	7	5
None	10	9	13	17	15	7	21	12	10	14
Use any	90	91	87	83	85	93	79	88	90	86

Q2cc. Which of these messaging services do you use? **Notes:** 1. Asked only of those who use social media and multiple responses allowed.

Social networking sites we've stopped using.

Seventeen percent have stopped using one or more social media sites in the past year, (12% in the telephone survey last year). Each site lost some followers with Twitter (31%) ahead of Instagram (25%) and Snapchat (20%). Influential factors have been boredom, too time-consuming and lack of appeal.

Twitter continues to have the highest drop off rate

Stopped using any social media channels in last year	Use SM (1321) %	Male (635) %	Female (684) %	18-29 (289) %	30-39 (290) %	40-49 (279) %	50-64 (255) %	65+ (208) %
Yes	**17**	20	14	25	20	15	11	9
Which ones	**(222)**	**(126)**	**(96)**	**(72)**	**(60)**	**(43)**	**(29)**	**(18)**
Twitter	**31**	31	31	31	33	25	39	23
Instagram	**25**	30	17	34	27	6	26	11
Snapchat	**20**	20	20	22	26	26	7	6
LinkedIn	**16**	15	17	9	11	15	32	37
Pinterest	**14**	17	10	13	12	20	6	27
Tinder	**13**	11	16	19	11	19	0	2
Vine	**10**	12	6	16	13	4	0	2
Facebook	**9**	9	9	5	13	17	6	0
Google+ (Google Plus)	**7**	13	1	11	8	3	8	0
YouTube	**6**	5	6	4	5	5	5	19
Tumblr	**6**	8	3	10	5	1	<1	12
Main reasons stopped using								
Nonsense / pointless	**10**	11	8	6	13	11	10	15
Time consuming	**17**	16	18	21	18	9	18	14
Not interested/dislike them	**15**	12	20	14	13	15	17	22
Boring content	**18**	21	14	20	12	7	44	2
Security or privacy concerns	**10**	10	10	8	7	23	6	3
No benefit to me	**10**	11	9	10	10	9	16	7

Q2d. Over the past year, have you stopped using any social networking channels? **Q2e.** Which ones? **Q2ee.** What is the main reason you have stopped using any social media channels?

Frequency of using social networking sites.

On average, Facebook users are accessing the site 37 times each week. (This compares with 25 times in the 2017 telephone survey).

Users of Snapchat and Instagram access those sites almost as often as Facebook users access that site – 36 times and 33 times respectively per week on average. (In 2017 the comparable results were 42 times for Snapchat and 38 times for Instagram). Users of Twitter and LinkedIn access these sites 23 times and 15 times a week on average. Last year, our telephone survey discovered more frequent use for Twitter (40 times weekly) and less frequent use for LinkedIn (9 times).

Site	Proportion who use %	Number of times per week						Average times per week
		5 or less %	1 to 2 %	3 to 5 %	6 to 10 %	11 to 19 %	20+ %	
Facebook	91	23	16	12	22	11	12	37
Instagram	39	28	18	13	16	11	11	33
Snapchat	23	24	19	13	16	12	13	36
Twitter	19	40	18	10	16	6	6	23
LinkedIn	22	58	17	9	6	5	3	15

Females are more frequent users of Facebook than males and frequency decreases with age, although it is still pronounced in the older age groups. The under 30s are checking in most of all averaging 49 visits weekly compared to 17 visits by the 65 plus cohort. Those aged 30-49 are also above average users while the 50-64 age group is not far below the overall average.

Instagram is used more often by females than males while there is little difference by gender in frequency of Snapchat use. However, both platforms generate lower rates of usage up the age scale, which is also largely the case for Twitter and LinkedIn. Males tend to access Twitter more often than females while the opposite is true regarding LinkedIn.

Average times use per week	Male	Female	18-29	30-39	40-49	50-64	65+
Facebook	**30**	42	49	44	39	26	17
Twitter	**25**	21	36	20	20	19	10*
Instagram	**28**	37	43	31	27	21	6
LinkedIn	**13**	17	16	23	13	10	4
Snapchat	**37**	36	45	27	25	30	5

Frequency of using social networking sites.

By state, frequency of Facebook use is highest in Tasmania and above average in NSW. The least frequent users are found in SA. The metropolitan usage frequency is lower than for regional areas. Snapchat usage frequency is highest in the ACT and lowest in WA, with regional residents accessing this site more often than metropolitan residents.

Instagram is used more frequently in NSW and less frequently in WA than elsewhere, but metropolitan and regional usage frequency does not vary much for this site.

LinkedIn is used in NSW more frequently than other states or territories and in metropolitan areas more than regional locations.

The ACT appears to house the most frequent users of Twitter.

Average times use per week	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Facebook	42	35	36	25	31	52	34	30	35	40
Twitter	31	22	13	24*	11*	12*	9*	35*	24	22
Instagram	42	29	28	32	20	35	39	38	33	36
LinkedIn	18	12	17	4	7	13	16	13	16	9
Snapchat	40	39	33	29	19	31	43	51	34	43

Q6a. In a typical week, how many times would you use Facebook / Twitter / Instagram / LinkedIn / Snapchat? **Notes:** 1. Asked only of those who use each of the social media sites listed above. 2. Can't say responses not shown and rounding occurs. 3 *Caution – sub-sample sizes are less than 30.

Time spent using social media sites.

The average time spent on Facebook per visit is 16 minutes (23 minutes in 2017). Multiplying average time spent by average usage occasions indicates that the typical user is spending almost 10 hours a week on Facebook, which is the same as last year's survey.

The average time spent on Instagram, Snapchat and Twitter each visit is similar – between 11 and 13 minutes. (The 2017 survey discovered much longer average usage durations for each of these three sites – around 30 minutes). The weekly average for LinkedIn is nine minutes (11 minutes in 2017).

A typical Facebook user spends **10 hours a week** on the site

Site used	Proportion who use %	Minutes spent per usage occasion						Average time (mins)
		5 or less %	6-10 %	11-15 %	16-30 %	31-60 %	over 60 %	
Facebook	91	33	23	14	13	8	5	**16**
Instagram	42	43	23	15	8	5	6	**13**
Snapchat	25	53	18	10	7	7	4	**12**
Twitter	23	48	18	16	8	4	3	**11**
LinkedIn	24	59	16	8	9	4	2	**9**

Females tend to use Facebook for a longer time than males on each usage occasion, but gender differences are not large for each of the five sites in this respect. Some age variations are indicated.

Average times use per week	Male	Female	18-29	30-39	40-49	50-64	65+
Facebook	**14**	18	16	18	16	16	13
Twitter	**11**	11	13	12	11	6	14*
Instagram	**12**	14	14	17	12	9	3*
LinkedIn	**9**	9	8	15	10	6	3
Snapchat	**13**	12	14	12	10	5	2

By location, the average duration of Facebook usage ranges from 13 minutes per occasion in the ACT and WA to 20 minutes in Queensland.

For the other sites, we can't be definitive about behaviour due to small sub-samples in certain locations.

Average minutes per occasion	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Metro	Regional
Facebook	15	16	20	14	13	19	19	13	15	18
Twitter	12	14	7	8*	5*	8*	6*	17*	10	13
Instagram	15	12	15	11*	7	8	13*	13*	13	13
LinkedIn	9	9	11	3*	5	8*	7*	10*	9	6
Snapchat	14	12	12	9*	3*	8	17*	12*	12	13

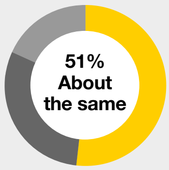
Q6b. And, roughly, how long would you spend each time you use Facebook / Twitter / Instagram / LinkedIn / Snapchat? **Notes:** 1. Asked only of those who use each of the social media sites listed above. 2. Can't say responses not shown. 3. *Caution - sub-sample sizes are less than 30.

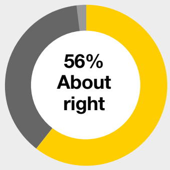
Users' views about time spent on social media.

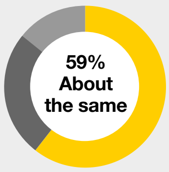
Around half those who use social media say they have not changed the amount of time spent on such sites over the past year, while for 29% this had increased and 17% said it had decreased. Therefore, on balance, usage time has increased (also the case in 2017).

Fifty-six percent are comfortable with the time they spend on social media with 36% feeling it is excessive (21% last year). Almost six in ten expect to spend the same amount of time on social media in the coming year, with more than one in five intending to reduce this behaviour.

Time spent social networking in past year has	Use SM (1321) %	Male (635) %	Female (684) %	18-29 (289) %	30-39 (290) %	40-49 (279) %	50-64 (255) %	65+ (208) %
Increased	**29**	27	31	32	41	29	23	18
Decreased	**17**	19	16	18	13	20	21	12
About the same	**51**	52	51	48	45	49	54	67
Perception of time spent social networking								
About right	**56**	62	50	42	46	50	67	84
Too much	**36**	30	42	49	47	40	25	11
Not enough	**2**	2	2	2	2	2	2	2
Foresee social networking time in next year								
Increasing	**13**	15	12	15	23	12	8	6
Decreasing	**22**	21	23	30	23	24	19	10
About the same	**59**	59	58	50	49	56	66	79







Q6c. Compared to last year, have you increased, decreased or spent about the same amount of time using social networking sites? **Q6d.** When you think about the amount of time you currently spend on social networking sites, do you feel it is…? **Q6e.** And looking at the next twelve months, compared to the last year, do you think you will be increasing, decreasing or spending around the same amount of time using social networking sites? **Notes:** 1. Asked only of those who use each of the social media sites. 2. Can't say responses not shown and rounding occurs.

Number of friends, contacts or followers.

The average number of social media friends and followers for each of the platforms of interest is shown below. It ranges from 93 for Snapchat to 241 for Instagram with Facebook close behind on 239. (Apart from the shift to an online methodology, other reasons we do not provide a comparison with prior results for this question are that this year a scale was used as part of the questioning to facilitate response because the open-ended question used previously attracted some large outliers).

Males reported more contacts than females in the case of LinkedIn, Twitter, Instagram and Snapchat but the opposite applies with Google+. For Facebook there is little difference between males and females in the average number of friends, contacts or followers revealed. An inverse age relationship is very much in evidence for Facebook, Twitter, Instagram and Google Plus. For LinkedIn, the 40-49 age group has the most friends, contacts or followers, while for Snapchat, it is the 30-39 age group.

Average number of friends, contacts or followers on...	**Use these**	**Male**	**Female**	**18-29**	**30-39**	**40-49**	**50-64**	**65+**
Facebook	**239**	237	240	394	288	235	114	68
LinkedIn	**179**	190	162	173	164	245	154	128
Twitter	**187**	211	142	257	201	141	176	26*
Instagram	**241**	250	234	327	230	162	123	25*
Google+	**176**	157	205	234	210	128	70*	25*
Snapchat	**93**	123	77	89	112	108	32*	25*

Metropolitan residents have more friends, contacts or followers on average for Facebook, LinkedIn, Twitter and Snapchat than those in regional or rural locations. That is not the case for Instagram and Google+ although the differences are not large.

For Facebook, the averages range from 136 in SA to 285 in Victoria. For other platforms, small sub-samples in certain locations prevent comparisons.

State	**Average number of friends, contacts or followers on SM sites used**					
	Facebook	**LinkedIn**	**Twitter**	**Instagram**	**Google+**	**Snapchat**
NSW	279	168	189	288	181	89
VIC	285	165	268	254	127	118
QLD	211	236	115	190	307*	78
SA	136	110*	173*	128*	55*	73*
WA	139	133	85*	149	62*	53*
TAS	245	231*	85*	181	29*	81*
NT	247	284*	42*	130*	25*	40*
ACT	186	220*	315*	290*	340*	163*
Metropolitan	263	187	192	237	175	104
Regional	190	123	170	253	183	65

Q5a. How many different friends, contacts or followers do you have on each of these social networking sites? **Notes:** 1. Asked only of those who use each of the social media sites listed above. 2. *Caution - sub-sample sizes are less than 30.

Number of Twitter accounts followed.

The average number of accounts followed by Twitter users is 171. It is slightly higher for males and slightly lower for females and declines with age. One in three users tweet daily or almost daily and just over half tweet more than once a week. Males and the 18-29 age group are the most prolific tweeters – 39% of males tweet daily or almost daily and 41% of those aged 18-29 tweet that often.

Number of Twitter Accounts followed	**Use Twitter**	**Male (154)**	**Female (98)**	**18-29 (63)**	**30-39 (77)**	**40-49 (56)**	**50-64 (38)**	**65+ (19)***
None	**4**	5%	2%	8%	6%	<1%	<1%	0%
Up to 50	**44**	41%	49%	22%	33%	57%	62%	80%
51-100	**17**	18%	14%	22%	19%	9%	19%	9%
101-200	**13**	12%	15%	18%	17%	11%	6%	0%
201-500	**10**	11%	75	14%	12%	8%	5%	0%
501-750	**5**	5%	5%	7%	5%	7%	0%	0%
751-1000	**3**	2%	3%	4%	5%	3%	0%	0%
More than 1000	**2**	2%	2%	<1%	2%	2%	6%	0%
Don't know	**4**	4%	4%	4%	3%	3%	2%	11%
Average	**171**	**175**	**163**	**210**	**201**	**164**	**135**	**30**
How often tweet								
More than five times a day	**8**	11%	4%	17%	4%	6%	6%	0%
Every day / most days	**25**	28%	20%	24%	33%	23%	25%	9%
A few times a week	**18**	19%	16%	21%	20%	25%	6%	3%
About once a week	**8**	10%	5%	8%	7%	5%	15%	12%
Less than once a week	**27**	18%	41%	18%	25%	27%	26%	52%
Do not tweet at all	**14**	14%	14%	12%	11%	14%	22%	24%

Q5d. Approximately how many Twitter accounts do you follow? **Q5dii.** And how often do you tweet on average? **Notes:** 1. Asked only of those who use Twitter. 2. *Caution – small sub-sample for 65+ age group. 3. This year a scale was used as part of the questioning to facilitate response and because the open-ended question used previously attracted some large outliers.

Devices and applications used to access social media.

Smartphones are by far the most preferred device for accessing social media. Seventy-four percent access their accounts on a smartphone (81% last year). Laptops (49%), desktops (35%) and tablets (35%) for social media are used by sizeable minorities. Some gender and age differences are apparent below.

Accessing social media on mobile devices via an app is much more common than via a website – 82% compared to 43%. (Also true in 2017). One in four use both means for accessing sites.

74% of people use smartphones to access social media

Devices used to access SM	Use SM 1321 %	Male (635) %	Female (684) %	18-29 (289) %	30-39 (290) %	40-49 (279) %	50-64 (255) %	65+ (208) %
Smartphone	**74**	70	79	92	88	80	62	36
Laptop computer	**49**	50	48	53	53	48	44	46
Tablet	**35**	33	36	32	40	37	34	29
Desktop computer	**35**	44	28	30	26	31	44	51
iPod Touch	**4**	3	4	8	4	1	3	1
Internet-enabled TV	**3**	4	3	6	3	3	3	<1
Mobile users access SM via	**(1083)**	**(490)**	**(591)**	**(277)**	**(270)**	**(241)**	**(188)**	**(107)**
App	**57**	54	59	64	58	59	47	49
Website	**18**	19	17	13	10	14	30	35
Both	**25**	27	25	23	32	28	23	16
Preferred platform								
Website	**35**	35	36	21	31	39	54	47
App	**65**	65	64	79	69	61	46	53

Q7ai. What devices do you use to access social network sites? **Q7aii.** And when you use social networking on your mobile device, do you use the platform's app or its website? **Q7b**. And, which do you prefer? **Notes:** 1. Asked only of those who use Social media. 2. Q7aii and Q7b only asked of those who use a Smartphone, Tablet or iPod.

Where social media sites are used.

Social media use at home is almost universal and much greater than in other locations. Nevertheless, social networking use at work (35% overall and 54% among those in the workforce), on public transport (32%), in the car (23%) and at restaurants, bars and parties (25%) is not uncommon. These findings are consistent with observations last year. Use of social media outside the home declines with age.

Within the home, a majority access social media in the lounge or living room (78%) or bedroom (58%), with females more inclined to do so than males. Those aged 65 plus are very much below average in using social media in those two rooms. Rooms like the study (28%), kitchen (25%), toilet (20%) and bathroom (13%) are also venues for social media use. The study's appeal increases with age and is higher for males than females. The other rooms (kitchen, toilet and bathroom) lose appeal up the age scale.

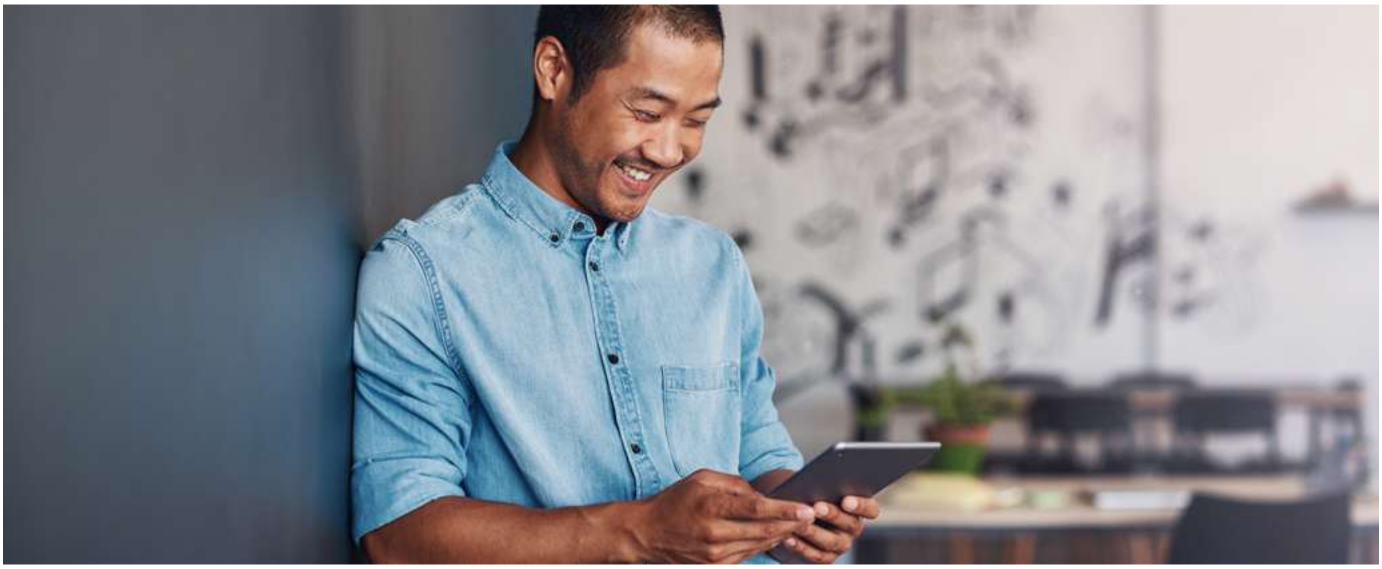
Where social media used	**Use SM 1321 %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Home	**94**	91	96	88	91	95	98	97
Work	**35**	37	33	51	47	38	22	6
On public transport	**32**	34	30	50	39	36	18	6
When out at restaurants, bars, parties etc.	**25**	25	25	39	32	26	16	6
In the car	**23**	18	27	39	31	19	14	2
At sporting events	**12**	13	12	19	15	13	8	1
At school or college	**8**	9	7	20	11	3	1	1
At the gym	**8**	9	7	17	9	6	2	1
In the cinema	**6**	6	6	12	7	7	3	<1
Where in home is SM used	**(1250)**	**(587)**	**(662)**	**(259)**	**(269)**	**(267)**	**(251)**	**(204)**
Lounge/living room	**78**	71	83	84	87	83	75	54
Bedroom	**58**	55	61	88	76	53	41	21
Study	**28**	37	21	20	21	23	32	52
Kitchen	**25**	22	28	41	35	23	14	8
Bathroom	**13**	14	13	30	19	8	5	<1
Toilet	**20**	20	20	39	32	16	7	1

Where social media sites are used.

Examining the location results, we see that social media use at home exceeds 90% across the nation. Use at work, on public transport and at restaurants, bars or parties is clearly more prevalent in metropolitan than regional or rural areas. Residents in SA stand out as the least likely users of social media at all the venues outside the home while NSW residents are among the most likely users. Within the home, SA users display a distinctly greater attraction to the study for using social media than residents elsewhere. Use of social media in the bedroom, bathroom and toilet is relatively pronounced in NSW and Victoria, with Victorians also prominent for networking while in the kitchen.

Where SM used	NSW (288) %	VIC (241) %	QLD (188) %	SA (141) %	WA (159) %	TAS (132) %	NT (85) %	ACT (87) %	Metro (896) %	Regional (425) %
Home	93	91	94	98	97	99	99	95	92	98
Work	37	39	37	19	26	27	31	34	41	23
On public transport	42	40	22	16	18	19	17	23	37	22
Out at restaurants, bars, parties etc.	30	28	20	14	21	22	20	18	28	19
In the car	26	24	22	10	21	18	20	20	22	25
Sporting events	15	13	11	8	12	6	13	7	13	11
School or college	10	10	6	3	5	6	2	4	9	6
At the gym	8	12	6	3	3	2	2	7	9	4
In the cinema	7	7	7	1	5	8	4	3	6	6
SM use at home in	**(266)**	**(220)**	**(175)**	**(138)**	**(154)**	**(130)**	**(84)**	**(83)**	**(835)**	**(415)**
Lounge/living room	76	78	82	59	83	84	86	75	78	77
Bedroom	66	65	53	35	47	54	38	45	61	52
Study	26	29	28	42	27	23	19	33	29	27
Kitchen	28	33	20	17	17	29	11	15	26	24
Bathroom	17	16	12	7	6	14	6	11	14	11
Toilet	26	24	14	16	9	18	13	20	20	19

Q7c. Where do you use social media sites – either on your computer or mobile device? Would you use them? **Q7d.** Where would you normally use these sites at home? In which rooms of the house? **Notes:** 1. Q7d asked only of those who use social media at home from Q7c. 2. Asked only of those who use Social media. 3. Multiple responses allowed.



TV and social media.

Almost two-thirds of users (63%) check in to social media while watching television. Females and those aged 18-39 stand out in this behaviour. A majority of those aged 40-64 also do this but only one quarter of the 65 plus age group use social media when watching TV. Movies (55%), news and current affairs (53%) and reality TV shows (50%) are the most likely programs to be viewed while accessing social media, but this is not uncommon when viewing other types of shows. Females are more inclined towards this activity than males when watching reality TV, dramas and soaps while the reverse applies with sport shows. The 65 plus age group is the most likely to be using social media when viewing news and current affairs shows but they are below average in doing so while watching other types of TV shows. The 18-29s stand out for using social media when watching movies and comedies on TV.

Almost one in three people discuss the programs they watch on social media. Such behaviour is more pronounced among those aged under 40. Most of those people (55%) claim to be more focused on their phone screen when watching TV and accessing social media at the same time.

Use SM while watching TV	**Use SM 1321 %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Yes	**63**	54	70	77	78	65	54	25
Genre favoured while on SM	**(816)**	**(336)**	**(479)**	**(223)**	**(219)**	**(182)**	**(135)**	**(57)**
News and current affairs	53	57	50	44	50	61	56	70
Reality TV shows	50	38	59	58	48	57	40	28
Sport	36	53	24	33	34	35	45	34
Movies	55	54	56	67	54	57	39	42
Documentaries	28	30	26	23	27	32	30	26
Comedy shows	38	40	37	52	38	40	23	5
Dramas	37	30	42	41	36	40	32	26
Soaps	27	20	31	28	34	28	19	13
Discuss on SM as watching								
Yes	**32**	30	34	37	46	33	16	6
Focus at time is on	**(255)**	**(93)**	**(161)**	**(77)**	**(91)**	**(60)**	**(22)***	**(5)***
Phone screen	55	59	54	54	62	54	43	39
Television screen	45	42	47	47	38	46	57	61

Q8a. Do you use social media when you watch TV? **Q8b.** Which types of shows do you mainly use social media whilst watching? **Q8c.** Do you discuss TV on social media during the program? Q8b. When watching TV while using social media is your attention typically focussed on your phone screen or the television screen?
Notes: 1. Q8b and Q8c asked only of those who use social media at while watching TV found in Q8a. 2. Q8d asked if use social media at while watching TV and discuss TV on social media during the program in Q8c. 3. Multiple responses allowed to Q8b. 4. *Caution – small sub-sample.

Use of Facebook Live and the story function.

Twenty-eight percent have used Facebook Live to watch video content that is live or recently recorded (25% in the 2017 telephone survey). Those aged 18-39 are more likely to have done this than older age segments. Nine percent have published their own video using Facebook Live (5% in 2017), but for those aged 18-39 this incidence is around 15%.

Forty-four percent have used the story function to publish pictures or videos, but this is much more common among those aged under 40 than the 40 plus segments. Facebook has been used for publishing pictures or videos more than Snapchat or Instagram.

Used Facebook Live to...	**Use SM 1321 %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Watch video broadcast live or recently recorded	**28**	30	27	38	39	27	19	12
Publish your own live video	**9**	10	9	14	15	7	5	1
Neither of the above	**68**	66	70	56	55	70	79	88
Published pictures/videos using the story function on								
Facebook	**35**	36	34	46	49	34	22	17
Snapchat	**16**	15	17	38	22	7	3	<1
Instagram	**16**	14	18	35	25	11	3	1
None of the above	**56**	58	55	32	40	62	76	82

Use of Facebook Live and publishing pictures or videos via the story function has occurred more in metropolitan than regional or rural areas. Some state variations are apparent but, in all locations, only a minority have engaged in either activity.

Used Facebook Live to...	**NSW (288) %**	**VIC (241) %**	**QLD (188) %**	**SA (141) %**	**WA (159) %**	**TAS (132) %**	**NT (85) %**	**ACT (87) %**	**Metro (896) %**	**Regional (425) %**
Watch content broadcast live or recently recorded	27	36	26	23	20	35	30	28	30	24
Publish live video	10	11	10	7	4	3	8	8	11	5
Neither of above	68	60	71	74	79	62	68	69	65	74
Published pictures / videos using the story function on...										
Facebook	**36**	36	41	30	20	30	25	34	37	30
Snapchat	**16**	25	12	8	8	15	8	9	18	12
Instagram	**18**	25	11	7	8	11	14	13	19	11
None of above	**54**	51	54	65	74	63	71	59	53	65

Q8e. Have you ever used Facebook Live to…? **Q8f.** Have you ever published pictures or videos of your activities using the story function on…? **Notes:** 1. Asked only of those who use Social media. 2. Multiple responses allowed to Q8f.

How free-to-air TV is primarily viewed.

Watching free-to-air TV at all and live is correlated with age. Live TV appeals more to males than females and is watched by only a minority of 18-29s. Almost twice as many people aged 65 plus watch live free-to-air TV as 18-29s. People aged under 40 are above average in watching replays on social media sites or via streaming services, although both types of viewing are very much in the minority across the board along with watching recorded free-to-air TV.

Live free-to-air TV is watched by a majority in all states and territories and is more popular outside metropolitan Australia. Other forms of viewing free-to-air TV are a little more common in metropolitan locations. Less than one in ten watch replays of free-to-air TV on social media in all locations. Streaming is most commonly utilised by residents of the ACT (23%) and relatively unpopular in SA (5%). Recorded TV is most popular in SA (17%) and least popular in Tasmania and the ACT (8% each).

Free to air TV primarily viewed on	**Use SM 1321 %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Live TV	**56**	61	52	38	50	62	65	72
Recorded TV	**12**	12	12	13	8	9	17	13
Streaming like 9Now, ABC iView, TenPlay, Plus7	**16**	13	20	22	25	15	9	9
Replays on SM sites like Facebook, YouTube, Twitter	**5**	5	5	8	8	4	5	1
Don't watch free to air TV	**11**	10	11	19	9	11	5	5

Free to air TV primarily viewed on	**NSW (288) %**	**VIC (241) %**	**QLD (188) %**	**SA (141) %**	**WA (159) %**	**TAS (132) %**	**NT (85) %**	**ACT (87) %**	**Metro (896) %**	**Regional (425) %**
Live TV	53	55	57	63	59	58	61	54	53	62
Recorded TV	10	12	13	17	16	8	8	10	13	11
Streaming services	19	15	20	5	10	19	16	23	17	14
Replays on SM	7	8	1	5	6	8	2	4	6	3
Don't watch	12	11	10	11	9	7	13	10	11	9

Q8g. When viewing content created for free to air TV do you primarily view this on …? **Notes:** 1. Asked only of those who use social media.

Reasons for using social media sites.

For more than eight in ten, social media is a way of keeping in touch with friends or family. Females are above average in this view (91% to 79%) but age differences are not large. Sharing photos or videos (46%) is the next most popular activity. This is also more prevalent among females and is above average in those aged under 40. Around one in three consumers of social media use it for news and current affairs (36%), to watch videos (32%), to find or connect with people with the same interests (31%). Males are slightly more inclined to use social media for those three purposes than females and an inverse age relationship is indicated. Other uses of social media are not rare, especially in the under 40s. On average, respondents mentioned four reasons for using social media.

Free to air TV primarily viewed on	Use SM 1321 %	Male (635) %	Female (684) %	18-29 (289) %	30-39 (290) %	40-49 (279) %	50-64 (255) %	65+ (208) %
Catch up with family / friends	**85**	79	91	84	86	89	85	81
Share photographs or videos	**46**	41	50	51	55	46	40	34
News and current events	**36**	37	36	41	38	37	35	28
Watch videos	**32**	34	30	42	43	30	26	10
Find or connect with people with same interests	**31**	32	30	35	35	32	28	21
Follow or find particular brands or businesses	**28**	25	32	34	35	37	18	13
Entertainment events	**25**	25	26	38	34	28	15	3
Research products and services might want to buy	**23**	22	24	29	26	25	17	16
Co-ordinate parties or other shared activities	**22**	17	27	33	34	23	12	4
Play games	**20**	16	23	22	23	20	18	16
Meet new friends	**18**	20	17	29	26	17	9	4
Follow celebrities, bloggers or social media personalities	**16**	10	21	26	22	17	5	3
Engage with brands for customer service issues	**14**	12	15	18	19	17	5	5
Provide reviews/ blogs about products you have bought	**10**	11	10	14	14	10	8	3
Average reasons given	**4**	**4**	**4**	**5**	**5**	**4**	**3**	**2**

Q4a. For what reasons, do you use social networking sites? Remember, we are talking about sites such as Facebook or Twitter and not the Internet in general. For which of these reasons do you use these types of sites?

Types of products or services researched on social media sites.

Social media as a means of research into products and services is used by almost one in four (23%). In prior telephone surveys this has been as high as 28% (in 2014) but was 16% last year. Entertainment activities feature in the most researched items which are movies and TV shows (66%), holidays / travel / accommodation (65%), entertainment (63%), clothing / fashion (48%) and music (48%). Use of social networking to research the following home-related products and services is relatively pronounced – appliances/electrical equipment (48%), furniture/things for the home (44%) and trade/home services (41%). Other products and services also generate research via social media by solid minorities.

Products or services researched on social networking sites	Research on SM (309) %	Male (137) %	Female (172) %
Movies / TV shows	**66**	65	67
Holidays / travel / accommodation	**65**	62	68
Entertainment	**63**	63	62
Clothing / fashion	**60**	40	76
Music	**48**	48	49
Appliances and electronic equipment (other than computers)	**48**	53	45
Furniture/things for the home	**44**	37	49
Trades and home services like builders, plumbers, electricians, gardeners, cleaners etc	**41**	38	42
Cosmetics/beauty	**39**	19	56
Games	**34**	39	31
Health and medical services like doctors, physiotherapists, dentists, medical centres etc	**32**	35	30
Personal services like hairdressers etc	**30**	16	41
Computer hardware	**30**	42	20
Computer software	**29**	41	18
Professional services like accountants, lawyers etc	**17**	**22**	**13**

Q4c. You mentioned that you use social networking sites to research products or services you might want to buy? What types of products or services would you mainly look for? **Notes:** 1. Asked only of those who use social media sites to research products or services. New list used in 2018 2. Multiple responses allowed.

Some gender differences are noteworthy. Clothing and fashion is the most researched item by females (76% compared to 40% for males) and cosmetics / beauty items also are researched via social media by most of the females (56% compared to 19% of males). Males stand out for using social media to research computer hardware (42% to 20%) and computer software (41% to 18%). On the other items listed, gender variations are insignificant. For the entertainment items, an inverse age correlation tends to apply but not for the other items.

Path to purchase.

Among the 23% using social media to research products or services, holidays / travel / accommodation (20%) was the item most likely to have been researched last time. There was no real difference between males and females in researching holidays / travel / accommodation last time, but those aged 18-29 were clearly below average (10%). Clothing / fashion items (14%) and movies / TV shows (13%) were next most researched; the former more by females (19% to 7%) and the latter more by males (19% to 8%).

Products or services looked for on last search occasion	Research on SM (309) %	Male (137) %	Female (172) %
Holidays / travel / accommodation	**20**	20	20
Clothing / fashion	**14**	7	19
Movies / TV shows	**13**	19	8
Entertainment	**8**	7	8
Appliances and electronic equipment (other than computers)	**7**	9	5
Furniture/things for the home	**7**	4	9
Cosmetics/beauty	**7**	0	13
Computer hardware	**4**	6	2
Music	**4**	6	2
Trades and home services like builders, plumbers, electricians, gardeners cleaners etc	**3**	4	3
Personal services like hairdressers etc	**3**	0	5
Games	**2**	4	1
Health and medical services like doctors, physiotherapists, dentists, medical centres etc	**2**	2	2
Professional services like accountants, lawyers etc	**1**	1	0
Computer software	**1**	3	0
Other	**6**	9	4

Q9a. Thinking about the last time you used social network sites to research something you might want to buy, what type of product or service were you looking for? **Notes:** 1. Asked only of those who use social media sites to research products or services.

The last time social media research was undertaken, it was on a mobile device (65%) more than on a computer (55%). Usually, this led to a purchase (59%) undertaken via an online transaction (79%).

How was that research conducted	Research on SM (309) %	Male (137) %	Female (172) %
Computer	**34**	44	26
Mobile device	**44**	37	50
Both	**21**	18	23
Neither	**1**	2	1
The research led to a purchase			
Yes	**59**	61	57
The resultant purchase was made online	**(178)**	**(78)**	**(100)**
Yes	**76**	78	74

Q9b. Did you do that research on a computer or a mobile device? **Q9c.** Did that research lead to a purchase? **Q9d.** Was that purchase made online? **Notes:** 1. Q9b and Q9c asked only of those who use social media sites to research products or services 2. Q9d only of those who use social media sites to research products or services and made a purchase.

Social media and brands.

More than four in ten consumers (44%) are following businesses or brands via social media. In the previous survey this incidence was just under one in four. Even though the survey method changed this year, this suggests growth in such activity has occurred in the last year. Females (52%) are following brands or businesses much more than males (35%) and this behaviour drops off with age. Those aged 18-29 are more than four times as likely to follow brands or businesses on social media than the 65 plus age group (64% to 13%).

Discounts (62%) and give-aways (51%) are the most popular benefits people like to receive from brands they follow, and this was also the case in 2017. Product information (45%) and tips and advice (35%) appeal to quite a few social media users while other benefits generate enough interest to make them worthwhile.

Follow brand / business on SM	**Use SM (1321) %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Yes	**44**	35	52	64	57	50	25	13
Desired from businesses or brands might follow?								
Discounts	**62**	57	65	68	65	68	53	49
Give-aways	**51**	45	57	58	59	54	45	34
Product information	**45**	44	47	51	52	47	40	34
Tips and advice	**35**	33	38	38	43	35	34	23
Invitations to events	**24**	24	24	28	31	27	20	11
Entertainment	**23**	24	22	32	27	26	17	7
Information about company	**23**	24	23	31	22	28	20	11
Feedback forums	**22**	22	23	26	28	22	19	15
Industry information	**15**	17	13	18	16	16	15	8
None of these	**18**	18	17	8	11	16	25	34

The incidence of following brands or businesses via social media ranges from 40% to 49% in all locations other than WA (29%) and SA (27%). Discounts are the most appealing benefit almost everywhere.

Follow brand or business on SM	**NSW (288) %**	**VIC (241) %**	**QLD (188) %**	**SA (141) %**	**WA (159) %**	**TAS (132) %**	**NT (85) %**	**ACT (87) %**	**Metro (896) %**	**Regional (425) %**
Yes	47	46	49	27	29	44	44	40	45	42
Desire from them										
Discounts	61	61	69	47	59	65	51	57	61	62
Give-aways	50	53	59	38	42	69	47	47	50	54
Product information	48	51	42	37	36	45	48	39	46	44
Invitations to events	28	18	30	17	20	20	25	25	25	22
Tips and advice	40	37	34	26	28	35	28	31	35	37
Information about company	27	28	21	13	17	21	14	20	24	23
Feedback forums	25	26	20	12	19	20	23	17	23	21
Industry information	21	14	13	11	8	9	8	18	16	13
Entertainment	27	22	23	17	17	20	14	16	25	18
None of these	15	14	16	33	29	15	26	15	17	19

Q10a. Do you follow any business or brand on social media? **Q10b.** Which of these things would you like to get from businesses or brands you might follow on social media? **Notes:** 1. Asked only of those who use social media.

Types of brands or businesses followed on Facebook or Instagram.

Among Instagram and Facebook users, 44% and 39% respectively follow brands or businesses on that platform. Above average in this behaviour for both platforms are females and those aged 18-29 and 20-39. The most favoured category is entertainment for Facebook just ahead of holidays / travel / accommodation, while for Instagram users it is clothing/fashion, then entertainment.

Follow brand / business on SM	Total use this SM %	Male %	Female %	18-29 %	30-39 %	40-49 %	50-64 %	65+ %
Facebook	**39**	36	42	51	55	44	28	6
Instagram	**44**	39	47	52	48	38	25	18

Q10c. Do you follow any particular brand or business on Instagram? **Q10d.** What type of brands or businesses do you like to follow on Instagram? **Q10e.** Do you follow any particular brand or business on Facebook? **Q10f**. What type of brands or businesses do you like to follow on Facebook? **Notes:** 1. Asked only of those who use Facebook or Instagram.

Types of brands / businesses like to follow	Follow them on...	
	Facebook (478) %	Instagram (210) %
Holidays / travel / accommodation	52	44
Entertainment	53	54
Music	42	45
Movies / TV shows	45	36
Clothing / fashion	46	64
Appliances and electronic equipment (other than computers)	24	18
Furniture / things for the home	23	25
Computer hardware	14	13
Computer software	13	14
Games	21	21
Cosmetics / beauty	25	39
Trades and home services like builders, plumbers, electricians, gardeners cleaners etc	20	15
Health and medical services like doctors, physiotherapists, dentists, medical centres etc	19	17
Professional services like accountants, lawyers etc	10	10
Personal services like hairdressers etc	21	17

Advertising on social media.

Attitudes towards advertising on social media tend to be more negative than positive. However, solid minorities are positively disposed or can be found in the neutral camp.

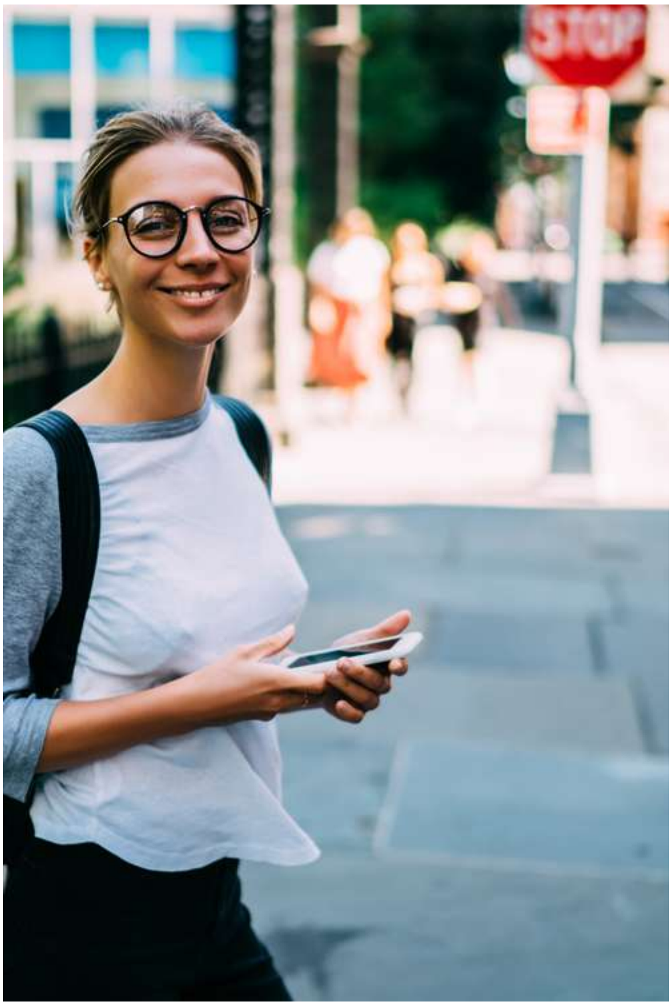
Around one in three sometimes click on ads they see on social media sites to find out more (36%) or will inspect a brand's social media presence before making an online purchase if they had not purchased from that website before (33%).

More than one in five agree that they are quite happy to see ads on social media sites (22%), or that they like sponsored posts from companies or brands they follow on social media (21%).

Attitudes towards advertising on social media	Use social media (n=1321)		
	Agree %	Neutral %	Disagree %
I'm quite happy to see ads on social network sites	22	44	34
I take no notice of the ads on social network sites	44	40	16
I like sponsored posts from businesses I follow on social networks	21	47	32
I'm turned off by companies or brands that advertise on social network sites	29	51	20
I sometimes click on ads I see on social network sites to find out more	36	26	38
I ignore sponsored posts from businesses I don't follow	53	36	11
I will inspect a brand's social media presence before making an online purchase if I have not purchased from their website before.	33	39	28

Q12. How do you feel about businesses or brands advertising on social network sites? Do you agree or disagree or have no opinion either way with the following statements? **Notes:** 1. Asked only of those who use social media.

33% of us check out a brand's social media presence before making our first online purchase from them



Interaction with brands on social media.

More than 50% of social media users say they are more likely to trust brands if they interact positively with customers on social media, make their content engaging and relevant, and keep it regularly updated. These results are consistent with last year's findings.

Polarised views exist about whether a large number of social media followers for a brand makes people more likely to trust it.

Are you more likely to trust the brand if…?	Use social media (n=1321)		
	Yes %	No %	Unsure %
You find their content engaging and relevant to you	55	24	21
They interact with customers in a positive way on social media	54	24	22
They regularly update their content	54	23	23
They have a large number of followers across sites like Facebook, Instagram, Twitter	36	39	25

Q12h. If or when you check a brand's social media presence, are you more likely to trust the brand if…? **Notes:** 1. Asked only of those who use Social media.

Eighteen percent stopped following at least one company or brand on social media in the three months prior to the survey, which compares with 8% in 2017. This incidence is the same for males and females and highest in the 30-39 age cohort (27%). By location, it ranges from 11% in SA to 21% in NSW.

Stopped following any company / brand on social media in last three months	Use SM (1321) %	Male (635) %	Female (684) %	18-29 (289) %	30-39 (290) %	40-49 (279) %	50-64 (255) %	65+ (208) %
Yes	**18**	18	18	24	27	16	12	7

Stopped following company / brand on social media in last three months	NSW (288) %	VIC (241) %	QLD (188) %	SA (141) %	WA (159) %	TAS (132) %	NT (85) %	ACT (87) %	Metro (896) %	Regional (425) %
Yes	21	19	16	11	12	22	20	18	20	13

Q12i. In the last 3 months, have you stopped following any company or brand on social media? **Notes:** 1. Asked only of those who use Social media. 2. Sample size shown in brackets.

Irrelevant or unappealing content is the most influential factor stopping people from following a brand or company on social media in recent months (as in 2017). Excessive content and too much advertising have also been quite influential.

Reasons stopped following in the last 3 months?	Stopped following in last three months (236) %
Irrelevant or unappealing content	**53**
Too much content	**44**
Too little content	**14**
Too many ads	**36**
Some other reason	**9**

Q12j. Was that because of…? **Notes:** 1. Asked only of those who have stopped following company / brand on social media in last three months.

Provision of online ratings.

Forty-five percent of social media users have provided online ratings. This is over twice as many as discovered in 2017 (22%). Males and females are similar in this behaviour and across age groups, the incidence ranges for 37% in the 65 plus segment to 54% in the 30-39s.

Among those who provide such ratings, the average number for the last year is eight (16 in 2017). There is little variation by gender or age group or location in averages recorded.

Provided online ratings	**Use SM (1516) %**	**Male (757) %**	**Female (755) %**	**18-29 (296) %**	**30-39 (303) %**	**40-49 (304) %**	**50-64 (309) %**	**65+ (304) %**
Yes	**45**	43	46	47	54	44	43	37
Ratings provided in last year	**(679)**	**(326)**	**(351)**	**(139)**	**(166)**	**(131)**	**(122)**	**(121)**
1-2	**20**	18	23	19	15	18	21	32
3-5	**27**	29	26	22	36	26	26	25
6-10	**25**	20	29	34	23	24	22	19
11-20	**12**	14	10	16	14	8	12	8
20+	**11**	14	8	3	12	17	11	15
Average	**8**	**9**	**8**	**8**	**9**	**9**	**8**	**8**

Provided online ratings	**NSW (313) %**	**VIC (282) %**	**QLD (203) %**	**SA (182) %**	**WA (183) %**	**TAS (152) %**	**NT (101) %**	**ACT (100) %**	**Metro (1014) %**	**Regional (502) %**
Yes	47	48	44	33	40	48	48	52	46	43
Ratings provided in last year	**(149)**	**(130)**	**(90)**	**(61)**	**(72)**	**(73)**	**(51)**	**(53)**	**(463)**	**(213)**
1-2	18	19	20	29	26	17	31	28	20	22
3-5	27	23	28	39	32	40	19	25	28	25
6-10	26	27	27	12	19	22	25	19	26	24
11-20	14	15	7	6	9	13	8	9	13	10
20+	12	10	14	8	8	8	14	11	10	14
Average	**9**	**9**	**8**	**6**	**7**	**8**	**8**	**8**	**8**	**9**

Provision of online ratings.

Holidays / travel / accommodation suppliers have attracted online ratings from social media users, much more than other product or service suppliers.

Products or services provided online ratings for	Provide online ratings / reviews (679) %
Holidays / travel / accommodation	56
Entertainment	26
Movies / TV shows	25
Appliances and electronic equipment (other than computers)	24
Clothing / fashion	23
Music	19
Trades and home services like builders, plumbers, electricians, gardeners cleaners etc	18
Furniture / things for the home	16
Games	16
Cosmetics / beauty	15
Health and medical services like doctors, physiotherapists, dentists, medical centres etc	13
Personal services like hairdressers etc	11
Computer hardware	10
Computer software	10
Professional services like accountants, lawyers etc	5
Computer hardware	10
Computer software	10
Professional services like accountants, lawyers etc	5

Q13a. Now some questions on online ratings – where you go on to a company's website to rate a product, service or entertainment by giving it a score out of 10 or a star rating of some kind. Do you ever provide these types of online ratings? **Q13b.** For what types of products or services have you provided online ratings? **Q13c.** And, in the last year, how many times do you think you would have provided an online rating? **Notes:** 1. Q13a asked of total sample. Q13b & Q13c asked of those who provide online ratings and reviews. 2. Rounding occurs. 3. Those saying don't know in Q13a & Q13c not shown.

Use of online reviews or blogs.

Just over two-thirds of social media users (68%) read online reviews or blogs. In 2017 this incidence was 44%. Although some gender, age and locational differences apply, a clear majority in all segments read online reviews or blogs. The average number of reviews or blogs read before making a purchase decision is eight, with minimal variation between segments.

Read online reviews or blogs	**Use SM (1516) %**	**Male (757) %**	**Female (755) %**	**18-29 (296) %**	**30-39 (303) %**	**40-49 (304) %**	**50-64 (309) %**	**65+ (304) %**
Yes	**68**	62	73	70	79	73	65	55
Number expect to read before decision	**(1052)**	**(485)**	**(565)**	**(212)**	**(237)**	**(224)**	**(208)**	**(171)**
1-2	**9**	8	9	6	8	8	9	15
3-5	**36**	42	32	41	39	29	32	42
6-10	**32**	31	32	32	31	35	36	23
11-20	**10**	8	12	12	11	12	7	9
21+	**5**	3	7	5	6	7	6	1
Average	**8**	**7**	**8**	**8**	**8**	**8**	**8**	**6**

Read online reviews or blogs	**NSW (313) %**	**VIC (282) %**	**QLD (203) %**	**SA (182) %**	**WA (183) %**	**TAS (152) %**	**NT (101) %**	**ACT (100) %**	**Metro (1014) %**	**Regional (502) %**
Yes	69	67	70	58	67	81	73	73	69	66
No. expect to read before decision	**(216)**	**(191)**	**(145)**	**(104)**	**(123)**	**(124)**	**(75)**	**(74)**	**(713)**	**(339)**
1-2	8	8	7	17	12	7	11	7	9	9
3-5	39	33	34	38	38	45	34	39	35	38
6-10	37	30	30	27	30	28	30	36	33	30
11-20	9	14	12	4	6	8	6	8	11	8
21+	6	4	6	3	5	10	3	2	5	6
Average	**8**	**8**	**8**	**6**	**7**	**8**	**7**	**7**	**8**	**7**

Q14a. Do you ever read online reviews or blogs to find out what other people think about products or services you might be interested in? **Q14b.** Approximately how many reviews would you expect to read before you make a decision? **Notes:** 1. Q14a asked of total sample. Q14b asked of those who read online reviews or blogs.
2. Rounding occurs and those saying don't know in Q14b not shown.

Posting online reviews or blogs.

Forty-three percent have posted reviews or blogs, which compares with 21% in 2017. By gender and age group there is not too much difference from the national average. This is also true regarding the average number of reviews or blogs posted in the last year, which is six.

Tasmanians love to post reviews and blogs at **52%** of users, beating the national average of 42%

Post online reviews or blogs	**Use SM (1516) %**	**Male (757) %**	**Female (755) %**	**18-29 (296) %**	**30-39 (303) %**	**40-49 (304) %**	**50-64 (309) %**	**65+ (304) %**
Yes	**43**	40	45	45	42	45	44	36
Number posted in last year	**(644)**	**(298)**	**(344)**	**(128)**	**(135)**	**(135)**	**(131)**	**(115)**
1-2	**27**	27	28	24	19	22	29	47
3-5	**33**	27	38	32	36	34	34	27
6-10	**21**	24	19	26	28	20	18	16
11-20	**7**	8	7	8	8	7	8	6
21+	**6**	8	4	3	5	9	8	3
Average	**6**	**7**	**6**	**6**	**7**	**7**	**7**	**5**

Across states and territories, the highest incidence of posting reviews and blogs is in Tasmania (52%) and the lowest is in SA (34%). Other locations are at, or close to, the national average of 43%.

Post online reviews or blogs	**NSW (313) %**	**VIC (282) %**	**QLD (203) %**	**SA (182) %**	**WA (183) %**	**TAS (152) %**	**NT (101) %**	**ACT (100) %**	**Metro (1014) %**	**Regional (502) %**
Yes	42	44	45	34	38	52	43	49	44	41
Posted in last year	**(133)**	**(122)**	**(94)**	**(62)**	**(67)**	**(72)**	**(45)**	**(49)**	**(444)**	**(200)**
1-2	28	29	21	42	28	31	22	34	25	34
3-5	27	33	45	31	27	34	38	30	32	36
6-10	25	21	20	15	19	8	26	17	24	15
11-20	8	7	8	3	7	9	4	6	8	6
21+	8	2	4	4	10	10	9	7	6	5
Average	**7**	**6**	**6**	**5**	**7**	**7**	**7**	**6**	**7**	**6**

Q14c. Have you ever posted an online review or blog where you provide your thoughts or opinions on products, services, entertainment and so forth? **Q14f.** And, in the last year, how many times do you think you would have posted an online review or blog? **Notes:** 1. Q14c asked of total sample. Q14f asked of those who ever post online reviews or blogs. 2. Rounding occurs. 3. Those saying don't know in Q14f not shown

Posting online reviews or blogs.

Holidays / travel / accommodation providers are well ahead of other types of product or service providers in receiving reviews over the past 12 months.

Products or services reviewed	Ever post online reviews or blogs (644) %
Holidays / travel / accommodation	**56**
Appliances and electronic equipment (other than computers)	**26**
Movies / TV shows	**25**
Entertainment	**23**
Clothing / fashion	**22**
Trades and home services like builders, plumbers, electricians, gardeners cleaners etc	**20**
Cosmetics/beauty	**15**
Music	**15**
Furniture/things for the home	**14**
Games	**12**
Health and medical services like doctors, physiotherapists, dentists etc	**11**
Computer hardware	**10**
Personal services like hairdressers etc	**10**
Computer software	**9**
Professional services like accountants, lawyers etc	**5**

Q14d. For what types of products or services have you provided online reviews or blogs? **Notes:** 1. Q14d asked only of those who post online reviews or blogs.

Twenty-two percent of those who have posted reviews or blogs online indicated that if a business gets back to them after they posted a bad review, their opinion of that business might change. A similar proportion disagreed (24%). The older the person, the less inclined they are to change their opinion in such situations.

Might change opinion if business responds to feedback on social media	Post reviews / blogs	Gender		Age				
		Male (298) %	Female (344) %	18-29 (128) %	30-39 (135) %	40-49 (135) %	50-64 (131) %	65+ (115) %
Yes	22	23	22	36	33	21	10	12
No	24	29	20	22	27	21	25	26
Maybe	53	48	58	42	40	58	66	62

Q14e. If a business gets back to you after you have posted a bad review, would that change your opinion of that business? **Notes**: 1. Q14e asked only of those who post online reviews or blogs.

Impact of social media on your personal life.

On balance, consumers believe social media has a negative impact on their privacy, sleeping, concentration, productivity, patience, grammar and spelling. Conversely, they tend to regard social media as impacting positively on their connectedness to others, relaxation and downtime and personal relationships.

What impact does social media have on the following aspects of your life	Use social media (n=1321)			
	Positive %	Negative %	No impact %	Net Balance* +/-
How connected you feel to others	54	16	30	+38
Relaxation and downtime	45	23	32	+22
Personal relationships	30	26	44	+4
Grammar and spelling	26	30	44	-4
Patience	22	29	49	-7
Productivity	22	37	41	-15
Concentration	20	36	44	-16
Sleeping	14	35	51	-21
Privacy	18	47	35	-29

Females are more positive than males about how connected they feel towards others because of social media and about its impact on relaxation and downtime. However, they are not quite as positive regarding its impact on personal relationships. Females are more critical of social media than males regarding its impact on their sleep, productivity, concentration and patience. Males view social media more negatively than females about its impact on their privacy.

An interesting age-related difference to emerge concerns the perceived impact of social media on spelling and grammar. Those aged under 40 hold a positive opinion on balance while older segments are negatively disposed. For the other dimensions, even though balances vary by age group, they align with the total sample result in being either positive or negative.

Impact of SM on ... (Net Balance)	Use SM (1321)	Male (298)	Female (344)	18-29 (128)	30-39 (135)	40-49 (135)	50-64 (131)	65+ (115)
How connected feel to others	**+38**	+32	+44	+41	+47	+45	+35	+19
Relaxation and downtime	**+22**	+19	+24	+28	+19	+19	+16	+15
Personal relationships	**+4**	+7	+1	+6	+7	0	+2	+3
Grammar and spelling	**-4**	-4	-4	+12	+2	-11	-16	-14
Patience	**-7**	-5	-8	-2	-7	-10	-5	-11
Productivity	**-15**	-9	-22	-13	-20	-26	-10	-12
Concentration	**-16**	-12	-19	-18	-19	-22	-8	-10
Sleeping	**-21**	-16	-25	-22	-27	-24	-16	-15
Privacy	**-29**	-33	-25	-20	-27	-35	-34	-31

Q15. Thinking now about how social media might be impacting on your personal life. Do you believe social media tends to have a positive or negative impact, or no impact on the following aspects of your life? **Notes:** 1. Asked only of those who use Social media. 2. Rounding occurs. 3. *Net balance is the difference between positive and negative responses.

Social media and topical issues.

More than a third of social media users have supported topical issues through that forum (37% in 2017).

Females have shown a greater inclination for this behaviour than males and it occurs to an above average degree among those aged under 50. The leading influences are seeing this as an easy way to show support, feeling passionate about the cause and to make their voice heard. They were also the top three reasons cited in 2017.

An easy way to show support was mentioned more by females than males and stands out for those aged 50-64.

Feeling passionate about the cause is a stronger motivator for people aged 30 plus than 18-29s.

Making my voice heard influences males more than females and stands out in the 40-49 age group.

Other motivations that are not insignificant include thinking this behaviour would make a difference and friends supporting topical issues via social media, with the former having more influence up the age scale while the opposite is true regarding the actions of friends.

Use social media to support topical issues	**Use SM (1321) %**	**Male (635) %**	**Female (684) %**	**18-29 (289) %**	**30-39 (290) %**	**40-49 (279) %**	**50-64 (255) %**	**65+ (208) %**
Yes	**35**	31	39	37	43	38	31	23
Main motivations	**(476)**	**(191)**	**(283)**	**(107)**	**(130)**	**(101)**	**(83)**	**(55)**
Easy way to show support	**59**	54	62	47	65	56	70	58
Felt passionate about cause	**51**	50	51	40	50	50	64	53
To make my voice heard	**43**	53	36	37	38	52	49	36
Thought make a difference	**22**	24	20	13	18	26	27	33
All my friends did	**21**	19	22	33	32	11	9	5
I felt pressured to	**9**	16	5	11	13	6	9	2
None of above	**3**	3	3	7	1	5	1	0

By locations, we find residents of ACT (49%) and Tasmania (46%) above average in using social media to support topical issues and those in SA and WA (28% each) least likely.

In all locations, a majority nominated an easy way to show support as a main motivation.

Use SM to support topical issues	**NSW (288) %**	**VIC (241) %**	**QLD (188) %**	**SA (141) %**	**WA (159) %**	**TAS (132) %**	**NT (85) %**	**ACT (87) %**	**Metro (896) %**	**Regional (425) %**
Yes	36	36	35	28	28	46	35	49	36	34
Main motivations for doing so	**(108)**	**(87)**	**(67)**	**(40)**	**(44)**	**(57)**	**(31)**	**(42)**	**(331)**	**(145)**
Easy way to show my support	58	54	66	53	62	54	70	67	54	69
I felt passionate about the cause	43	55	52	56	63	47	48	57	47	58
To make my voice heard	36	56	42	58	30	31	38	38	47	33
I thought it would make a difference	20	23	19	32	23	22	20	33	20	25
All my friends did	26	23	19	8	12	8	16	11	24	12
I felt pressured to	11	14	3	10	10	2	4	0	13	2
None of the above	2	4	4	4	0	7	0	7	3	4

Q16a. These days many different issues or events attract social media attention from members of the public. Have you ever used any of your social media accounts to support topical issues or events, or to participate in public conversations about them (for example writing a post or changing your profile picture in relation to issues such as marriage equality, asylum seekers or terrorist attacks)? **Q16b.** Which, if any, of these reasons have motivated you to use social media in that way? **Notes:** 1. Q16a asked of all social media users. Q16b asked of those who ever use social media to support topical issues. 2. Rounding occurs.

Trust in social media for news.

Traditional media (73%) is much more trusted as a news source than social media (16%) or posts from friends about what is happening (11%). This is consistent with the 2017 survey results. Across the board, a clear majority nominated traditional media. The 18-29s are above average in trusting social media news sources (26%) while trust in traditional sources rises with age.

One in three (33%) admitted reacting to something on social media which they later learnt to be untrue. This was 17% in 2017. This experience is more common for females and less likely up the age scale.

One in three of us admit to reacting to something on social media we later found to be untrue

Trust most for news	**Total sample (1516) %**	**Male (757) %**	**Female (755) %**	**18-29 (296) %**	**30-39 (303) %**	**40-49 (304) %**	**50-64 (309) %**	**65+ (304) %**
Traditional sources such as radio, TV and print media	**73**	75	72	60	61	69	82	93
News sources on SM	**16**	16	16	26	22	18	11	2
Friends or family posts on SM about what's happening	**11**	10	13	15	17	13	7	5
Reacted to something on SM to find later it was not true								
Yes	**33**	28	38	45	41	36	25	19

Trust most for news	**NSW (313) %**	**VIC (282) %**	**QLD (203) %**	**SA (182) %**	**WA (183) %**	**TAS (152) %**	**NT (101) %**	**ACT (100) %**	**Metro (1014) %**	**Regional (502) %**
Traditional sources	71	70	71	82	80	80	82	80	71	77
News on SM	17	20	16	9	8	11	4	12	18	12
Friends or family posts on SM	12	10	13	9	12	9	14	8	11	11
Reacted to something on SM that wasn't true										
Yes	32	35	38	22	29	36	25	30	35	28

Q17. Which of these three sources do you trust most for news? **Q18.** Have you ever reacted to something on social media only to find out later that it was not true?
Notes: Q17 & Q18 asked of all social media users.

Social media experiences.

Three in ten adults have been excited when one of their posts received more likes than usual on social media (33% in 2017). One in four (25%) have witnessed someone being bullied or harassed on social media, while 14% have experienced such behaviour personally. In the 2017 telephone survey these incidences were lower at 18% and 6% respectively. Almost one in four (23%) have checked their social media when dining out with family or friends (19% last survey) and one in five have posted something they later regretted (12% in 2017).

Each of the above experiences has been more prevalent among females than males and inversely correlated with age group. In the 18-29 age group we also find 24% admitting to anxiety if unable to check their social media.

Experienced this	Total sample (1516) %	Male (757) %	Female (755) %	18-29 (296) %	30-39 (303) %	40-49 (304) %	50-64 (309) %	65+ (304) %
Felt excited when one of your posts has received more likes than usual on SM	**30**	24	36	46	39	35	23	9
Witnessed someone else being bullied or harassed on SM	**25**	22	28	38	37	25	18	5
Checked your SM while eating a meal with family or friends	**23**	17	28	41	33	28	10	2
Posted something that you later regretted	**20**	17	22	32	27	23	12	5
Worried that your SM footprint might one day come back to haunt you	**15**	16	14	22	22	17	10	6
Bullied or harassed on SM	**14**	11	16	23	19	16	9	2
Felt anxious when you haven't been able to check your SM	**11**	10	12	24	16	12	4	0
Relied on SM for medical advice different to your doctor's	**5**	4	6	8	6	6	2	2
None of the above	**42**	49	37	18	25	35	54	80

The results for metropolitan and regional / rural residents do not differ markedly but across the states and territories we find more distinct variations. The bottom row in the table below is instructive. In SA and WA more than half have not had any of the experiences listed while elsewhere, most adult residents have encountered at least one, especially in Tasmania where 69% have been affected.

Experienced this on SM	NSW (313) %	VIC (282) %	QLD (203) %	SA (182) %	WA (183) %	TAS (152) %	NT (101) %	ACT (100) %	Metro (1014) %	Regional (502) %
Felt excited when post received more likes than usual	34	30	33	16	23	38	27	26	31	28
Witnessed someone else bullied or harassed	29	27	22	15	17	31	21	26	25	24
Checked your SM while eating meal with family / friends	27	22	24	16	14	27	18	24	23	22
Posted something later regretted	23	20	19	14	14	23	18	19	21	17
Worried your SM footprint might one day haunt you	16	17	14	13	11	15	15	26	17	13
Bullied or harassed	15	18	13	10	7	14	11	14	15	12
Felt anxious when not able to check your SM accounts	15	14	9	5	3	11	4	9	13	8
Relied on SM for medical advice different to doctor's	6	7	3	3	<1	1	4	3	5	4
None of the above	37	41	41	55	56	31	48	43	41	46

Q19. Which, if any, of these experiences have happened to you? **Notes:** 1. SM = social media. 2. Rounding occurs.

Social media restrictions placed on children or teens at home.

Among parents with children or teenagers at home, 61% place some type of restriction on the social media use of those offspring. This becomes less common as parents reach their 50s, undoubtedly reflecting the relatively older age of their children at home. The restriction mentioned most relates to the amount of time allowed on social media (25%), followed by the times of day its use is allowed (21%). Not allowing use without a responsible adult present (17%), taking it away as punishment (15%) and restricting where social media can be used (14%) are not rare situations.

How social media is restricted in the home	Parents with kids (543) %	Male (228) %	Female (314) %	18-29 (116) %	30-39 (184) %	40-49 (188) %	50-64 (50) %	65+ (5)* %
Not at all	**39**	41	38	39	41	32	56	78
Amount of time allowed on it	**25**	23	26	30	24	26	12	11
Times of day use is allowed	**21**	23	19	21	24	20	16	0
Not allowing use without a responsible adult present	**17**	20	14	16	16	17	19	11
Taken away as a punishment	**15**	12	17	10	7	14	7	0
Where SM use is allowed	**14**	13	15	17	15	14	6	0
In other ways	**10**	7	12	10	7	14	7	0

Restrictions placed on social media use of children and teens at home by parents are a little more common in regional / rural locations (68% to 58% in metropolitan locations). They also appear to apply in WA more than any other state or territory.

61% of parents restrict their child's social media use

Social media restriction by location	NSW (125) %	VIC (111) %	QLD (97) %	SA (40) %	WA (50) %	TAS (52) %	NT (31) %	ACT (37) %	Metro (375) %	Regional (168) %
Not at all	39	36	43	63	26	40	50	39	42	32
Amount of time allowed on SM	23	32	20	15	28	23	24	30	25	25
Times of day when SM use is allowed	19	25	20	11	26	13	6	17	23	17
Not allowing use without responsible adult present	16	23	11	8	14	19	20	17	17	15
Taken away as a punishment	11	18	19	6	12	16	12	15	13	19
Where use allowed	12	17	14	13	17	10	7	15	15	12
In other ways	13	6	9	7	16	8	3	12	8	15

Q20. In which ways, if any, is social media use by children or teens restricted in your household? **Notes:** 1. Q20 asked only of parents with children or teens.
2. *Caution – very small sub-sample.

About Yellow.

Yellow is the champion of Australian small and medium businesses. Its brands include Yellow Pages, True Local, WhereIs, Found Digital, Bridge, and Pocket Office. Yellow also provides an extensive range of digital marketing services including search engine marketing, search engine optimisation, digital display, websites and social media services for all business types. Yellow is a division of Sensis – Australia's leading marketing services company. Other Sensis brands include White Pages, Sensis Data Solutions and Skip.

This year, the Yellow Social Media Report has been released in two parts, with this edition focusing on the results of the consumer survey. A second report features the business survey results.

Yellow™
222 Lonsdale Street
Melbourne Vic 3000
Ph: 1800 359 321
yellow.com.au

A Sensis Company
ABN: 30007423912

Published June 2018

See Part two of the Yellow Social Media Report 2018 - Business

yellow