

Twitter Usage In America: 2010

The Edison Research/Arbitron Internet and Multimedia Study

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Edison Research



How you know.SM

Executive Summary

Twitter Usage in America: 2010 presents the results of a nationally representative survey of 1,753 Americans age 12 and over, administered via landline and mobile phone interviews conducted in February 2010. This study is part of the Edison Research/Arbitron Internet and Multimedia research series, now in its 18th iteration. Twitter Usage in America: 2010 encapsulates three years of tracking data on Twitter usage in the United States (2008-2010).

Key Findings and Implications

1. Awareness of Twitter has exploded over the past twelve months.

The percentage of Americans who are familiar with Twitter has surged from 5% in 2008 to 87% in 2010. With the percentage of Americans who have access to the Internet stalled at roughly 85%, more people are *aware* of Twitter than could possibly *use* the service. This extremely high level of awareness has likely been driven by traditional media saturation, with many mainstream television, radio and print media outlets prominently highlighting their Twitter accounts throughout the course of their programming.

Executive Summary

2. Despite near-ubiquitous awareness, Twitter is currently used by seven percent of the population, or approximately 17 million Americans.

Though the pace in Twitter's growth in awareness has exceeded even that of Facebook (and the two services are now equally well-known), roughly six times more Americans maintain a profile page on Facebook than use Twitter. Server-based reporting methods indicate that the number of user accounts in America is appreciably higher; however, the effects of multiple/duplicate accounts, SPAM accounts and user churn likely explain this differential.

3. As such, Twitter has yet to articulate its value and usage benefits to the vast majority of Americans.

Almost 50% of Americans 12+ maintain a profile on at least one social networking site, with the vast majority using Facebook. Online social networking, therefore, is now a mainstream behavior in American society. While sites like Facebook and LinkedIn have well-defined use cases and benefits, Twitter has yet to establish a clear value proposition (even as a purely entertainment service) for a majority of the current users of social networking sites and services in the United States.

Executive Summary

4. Twitter does appear to be disproportionately popular with African-Americans.

The percentage of Twitter users who are African-American currently stands at roughly 25%, which is approximately double the percentage of African-Americans in the current U.S. population. Indeed, many of the “trending topics” on Twitter on a typical day are reflective of African-American culture, memes and topics. This segment of the U.S. population may be using Twitter more conversationally than other Twitter users, though further study would be required to characterize any differential in the nature of African-American Twitter usage.

5. One strategy to encourage Twitter adoption may be to emphasize the parallels between status updates via Twitter and SMS messaging.

About 70% of Americans send and receive SMS messages via mobile phone, with 45% doing so multiple times *every day*. If Twitter can successfully communicate relevant features and benefits to this growing majority of Americans, it may be able to stimulate user growth among mainstream Americans. Twitter itself may be thinking along these lines with its recent acquisition of SMS technology provider Cloudflopper.

Executive Summary

6. With nearly half of all Americans maintaining profiles on social networks, Twitter must tap into the motivations of those Americans to maintain relevance in the face of Facebook's continued encroachment into the real-time status updating and search spaces.

With many Americans joining Facebook mainly to find and connect with people they already know, Twitter could benefit by tapping into those same motivations and behaviors by providing improved tools for mainstream Americans to find their friends and family members on Twitter. Twitter has also not emphasized its ability to create closed networks with private Twitter pages. Improved awareness of those features, combined with improved tools to find people that prospective users already know, may encourage usage among potential mainstream adopters.

7. The majority of Twitter users are “lurkers,” passively following and reading the updates of others without contributing updates of their own.

However, most (70%) regular Twitter users *do* post status updates to some social networking service (likely Facebook), so the issue has less to do with any reluctance to create content per se, but more likely with a differential in how Twitter is used compared to Facebook. Twitter appears to be functioning as more of a broadcast medium compared to Facebook and many other social networking sites and services.

Executive Summary

8. Marketing and Business use cases for Twitter far exceed similar usage for social networking Web sites in general.

The percentage of Twitter users who follow brands is more than three times higher than similar behavior expressed by social networking users in general. Significant percentages of regular Twitter users report using the service not only to seek opinions about companies, products and services, but to *provide* those opinions as well. Users of social media monitoring services should be aware that these behaviors may be far more prevalent on Twitter than on other monitored sites and services, which may introduce a bias into the data provided by social media monitoring platforms.

As such, Twitter's most *natural* path to revenue may be to commercialize these interactions, providing the "plumbing" for enterprise Social CRM (Customer Relationship Management) efforts.

Executive Summary

9. Twitter is a natural “companion medium” to other media channels - in particular, as an accompaniment to live TV.

While most Twitter users are ambivalent about television (and spend considerably more time on the Internet), Television still wins as the medium most likely to be turned to in the event of a breaking news story. Also, the top-trending television programs on Twitter in 2009 were far more likely to be live events than were the most frequently searched programs on Google (and indeed, the most frequently *watched* programs according to Nielsen.)

10. A significantly higher proportion of Twitter users update their social networking profiles - and access Twitter - using mobile phones than the average user of other social networking sites and services.

Twitter enjoys enormous popularity among users of iPhones and other smartphone devices. One in five regular Twitter users updates the service via mobile phone several times per day, while one in three do so at least daily.

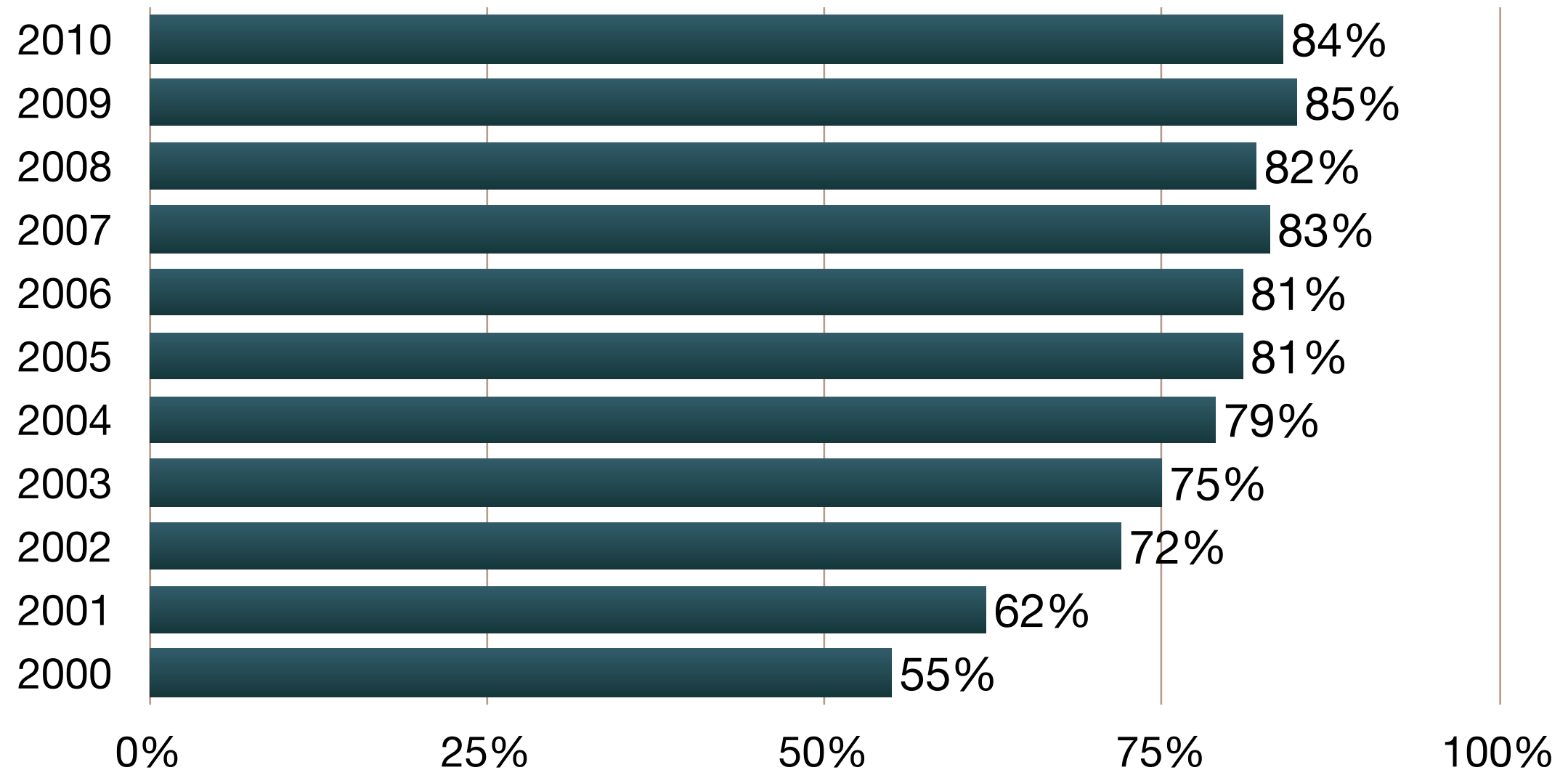


General Internet Trends



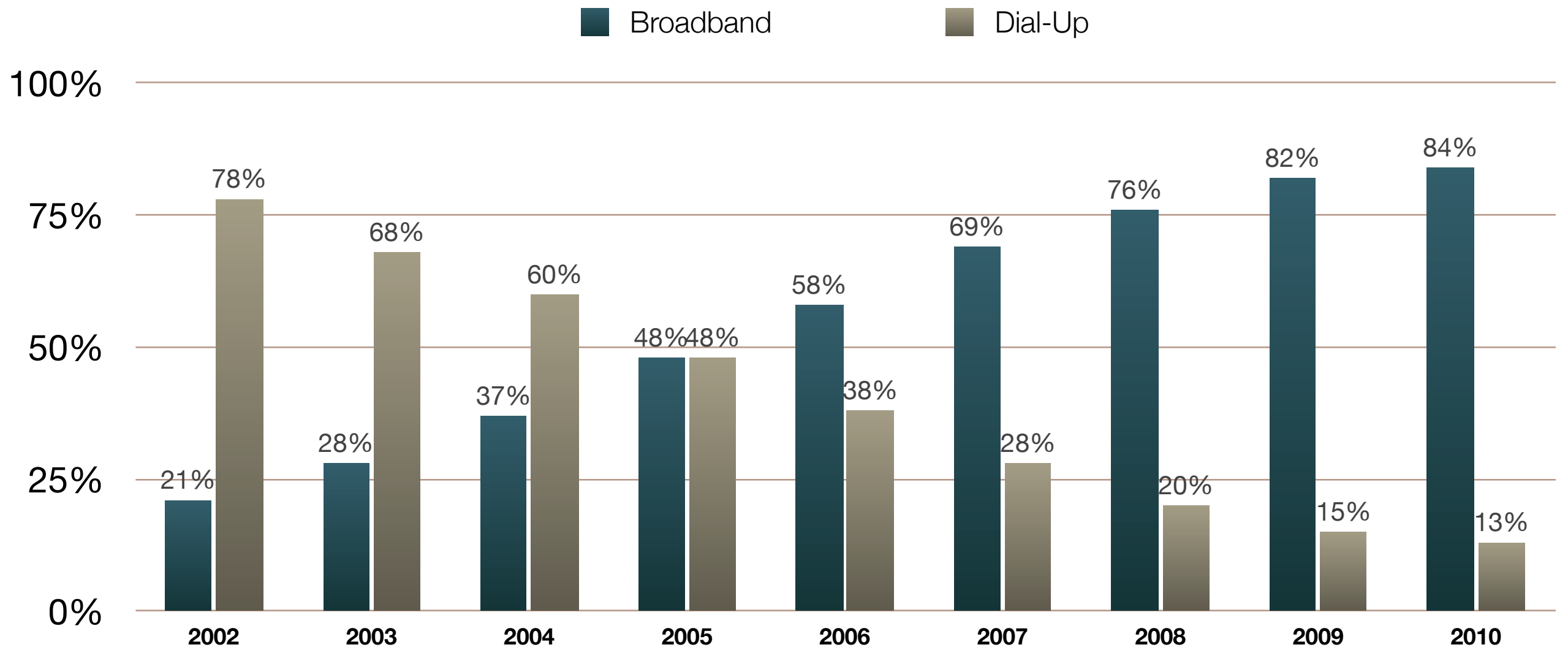
Internet Access Stabilizes

% with Internet Access From Any Location



Six In Seven Homes With Internet Access Have Broadband

% Who Have Broadband vs Dial-Up Internet Access at Home

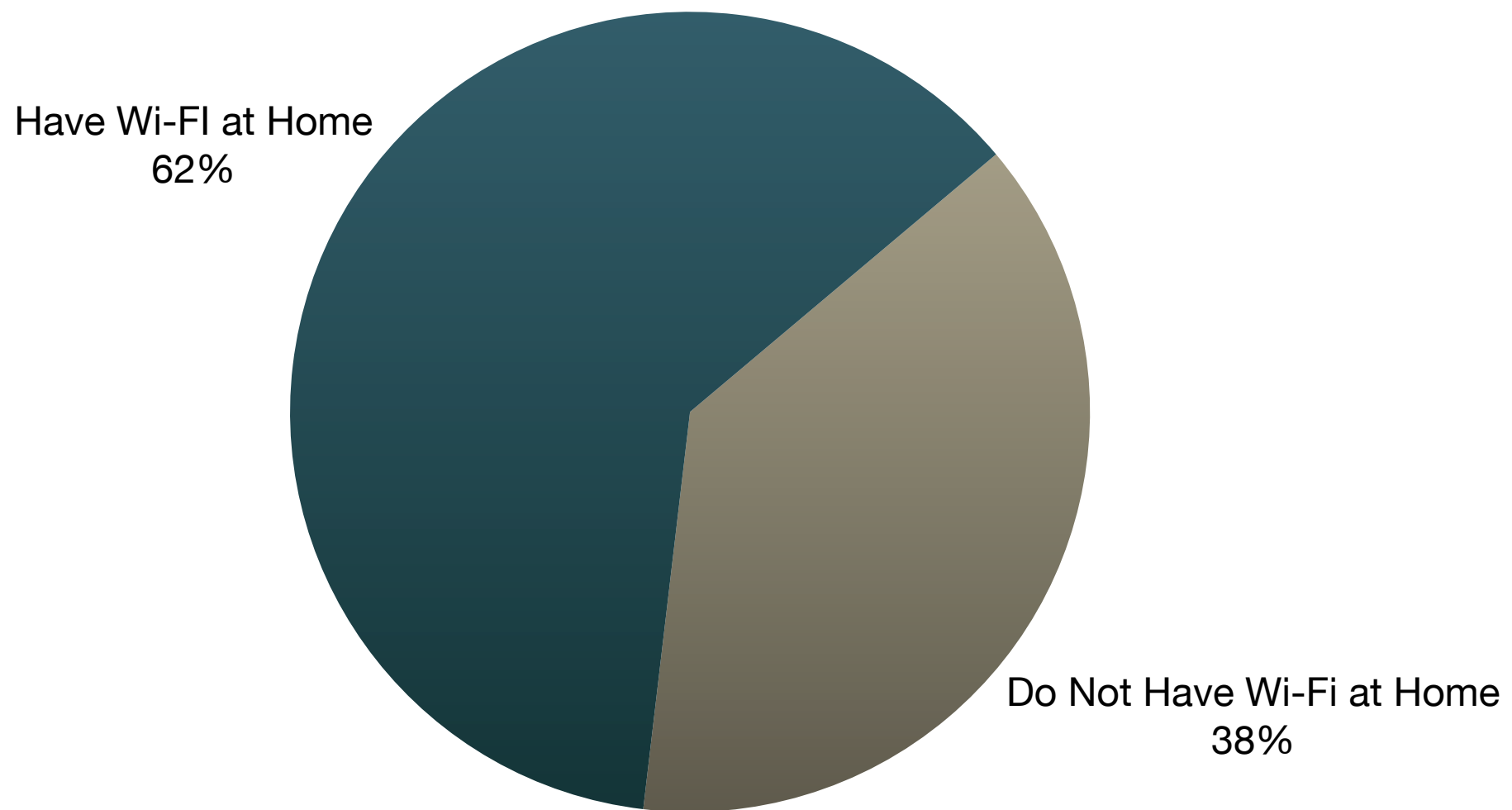


Base: Access the Internet From Home



More Than Six in Ten Homes with Internet Access Have a Wi-Fi Network

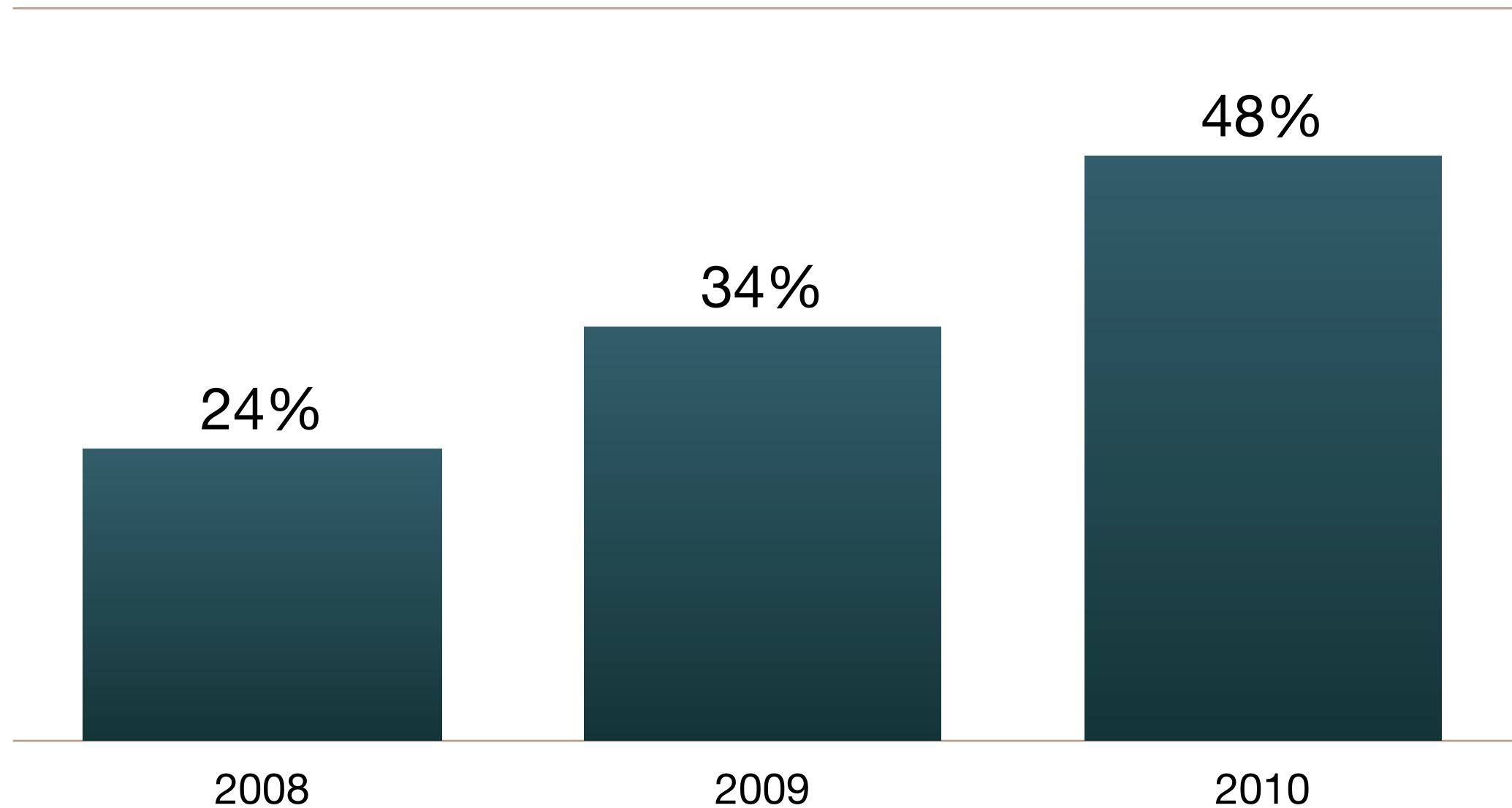
“Do you have a wireless network setup (also known as a Wi-Fi Network) in your home?”



Base: Access the Internet from Home

Social Networking Sees Explosive Year-Over-Year Growth

% Who Currently Have a Personal Profile Page on Facebook, MySpace, LinkedIn or Any Other Social Networking Web Site

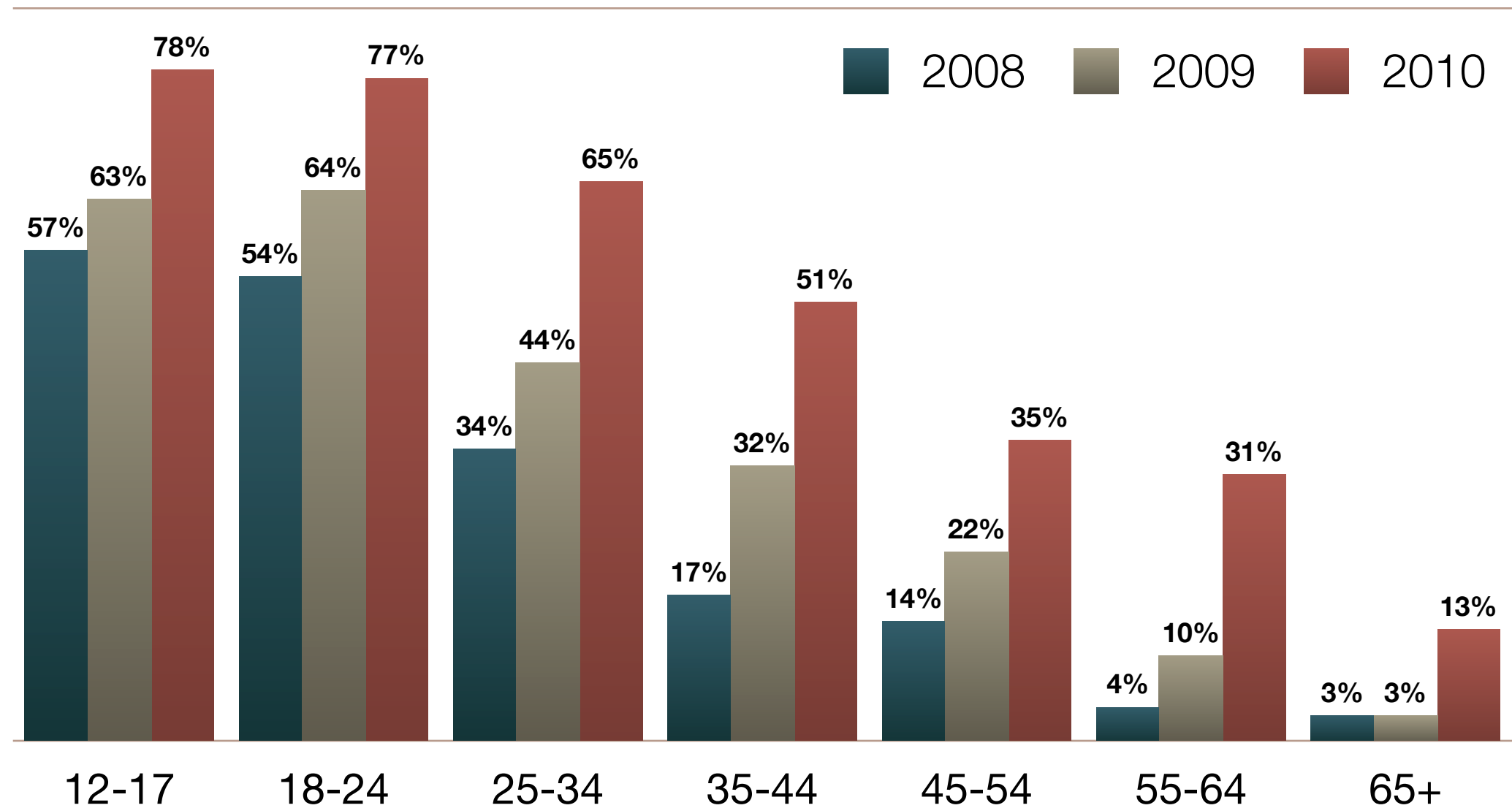


Base: Total Population 12+



Social Networking Sees Explosive Year-Over-Year Growth

% by Age Group Who Currently Have a Personal Profile Page on Facebook, MySpace, LinkedIn or Any Other Social Networking Web Site



Base: Total Population 12+



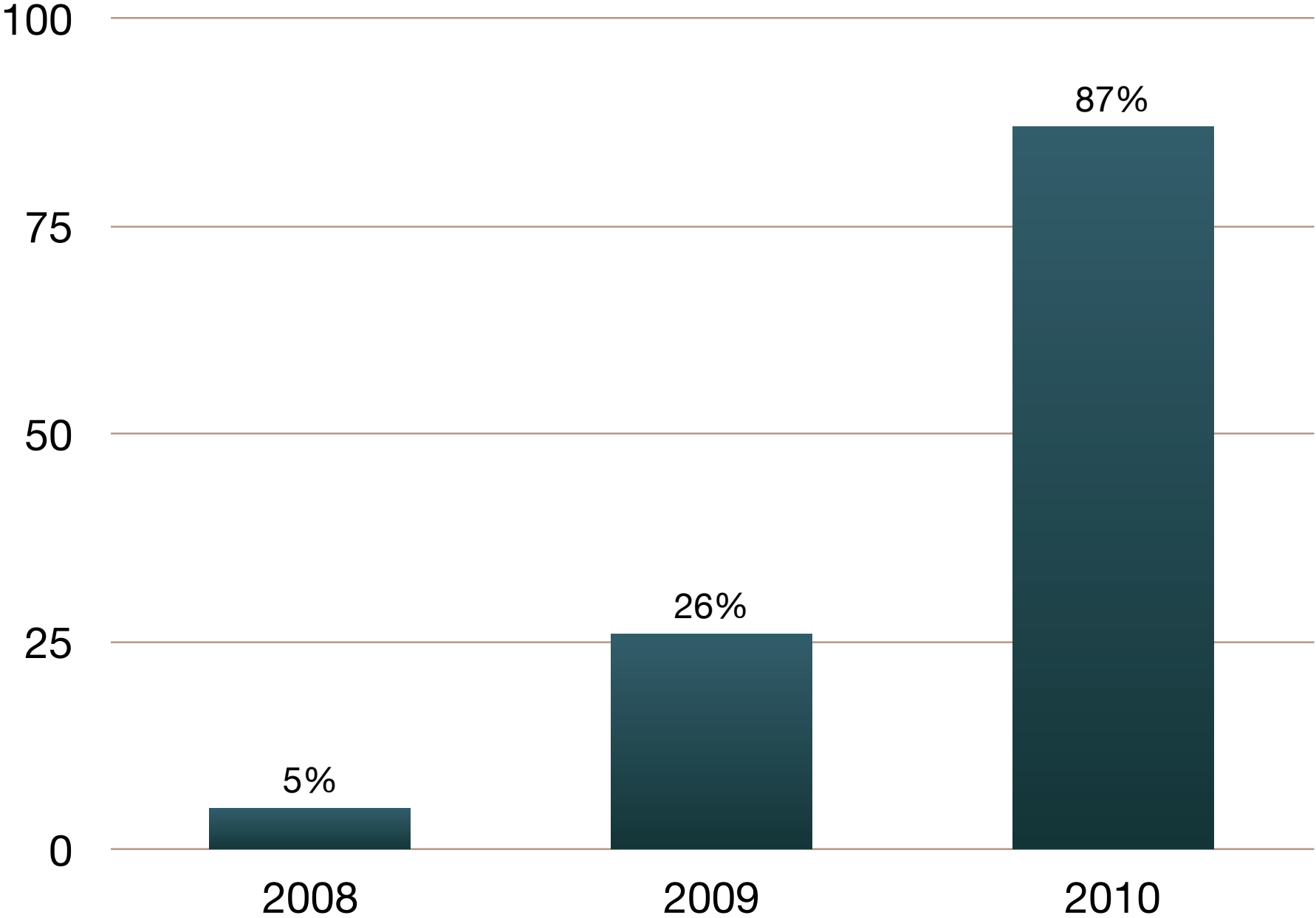


Twitter Awareness and Usage



Awareness of Twitter Explodes

% Who Have Ever Heard of Twitter

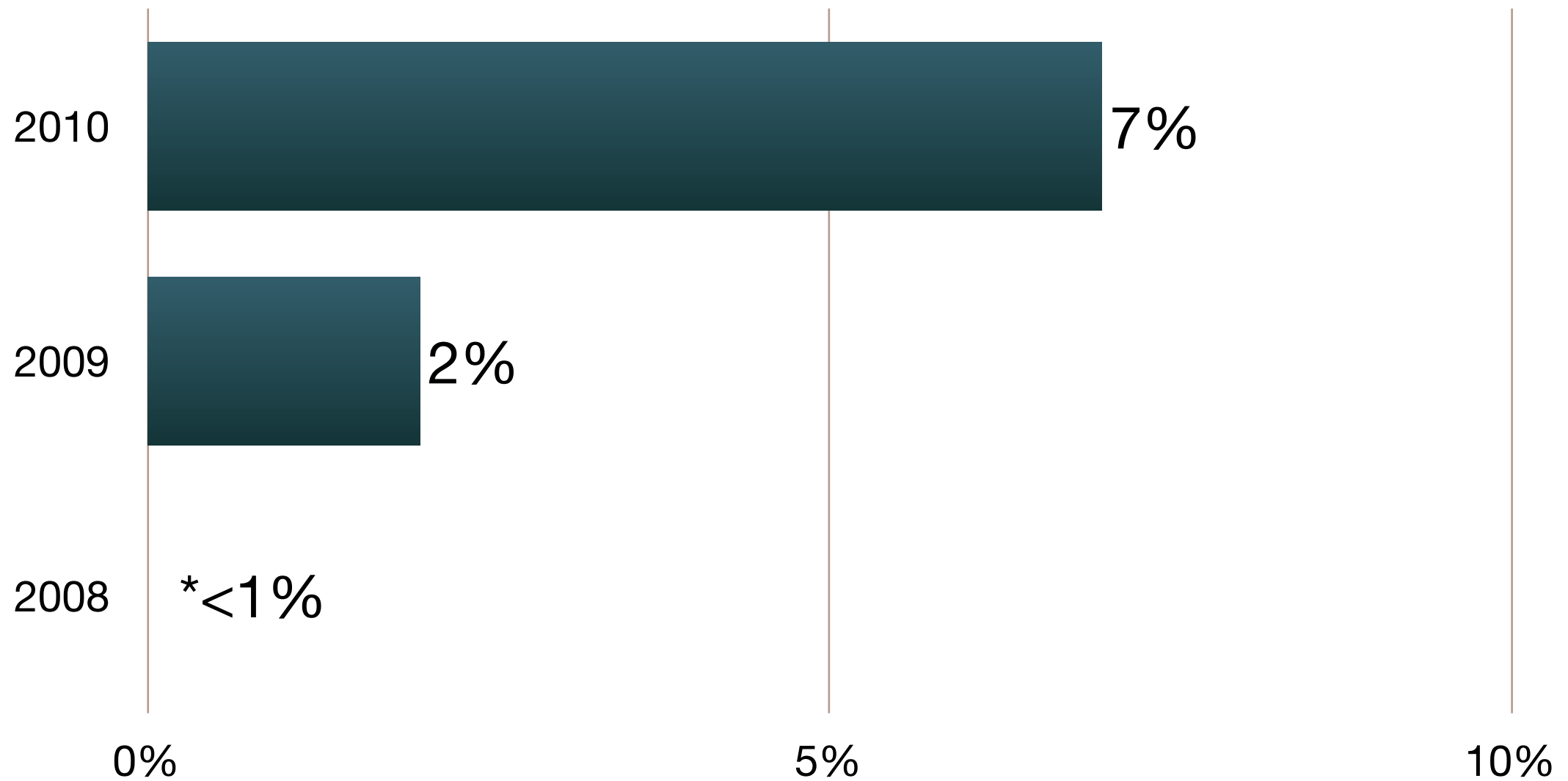


Base: Total Population 12+



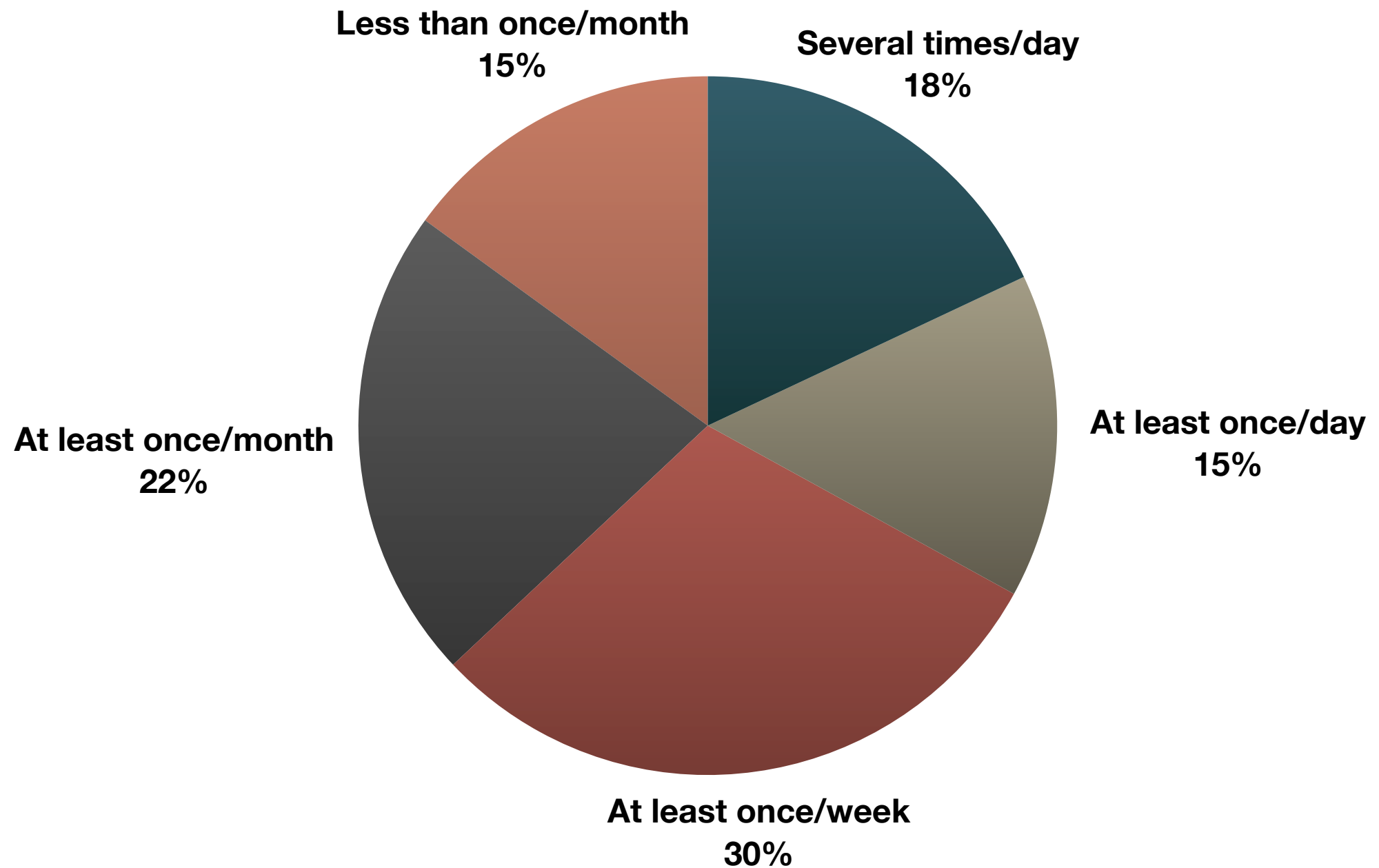
Twitter Usage Stands At Approximately 17 Million Americans

"Do you currently ever use Twitter?" (% saying "Yes")



Twitter Users Split Between Habitual “Tweeters” and Those Who Access Occasionally

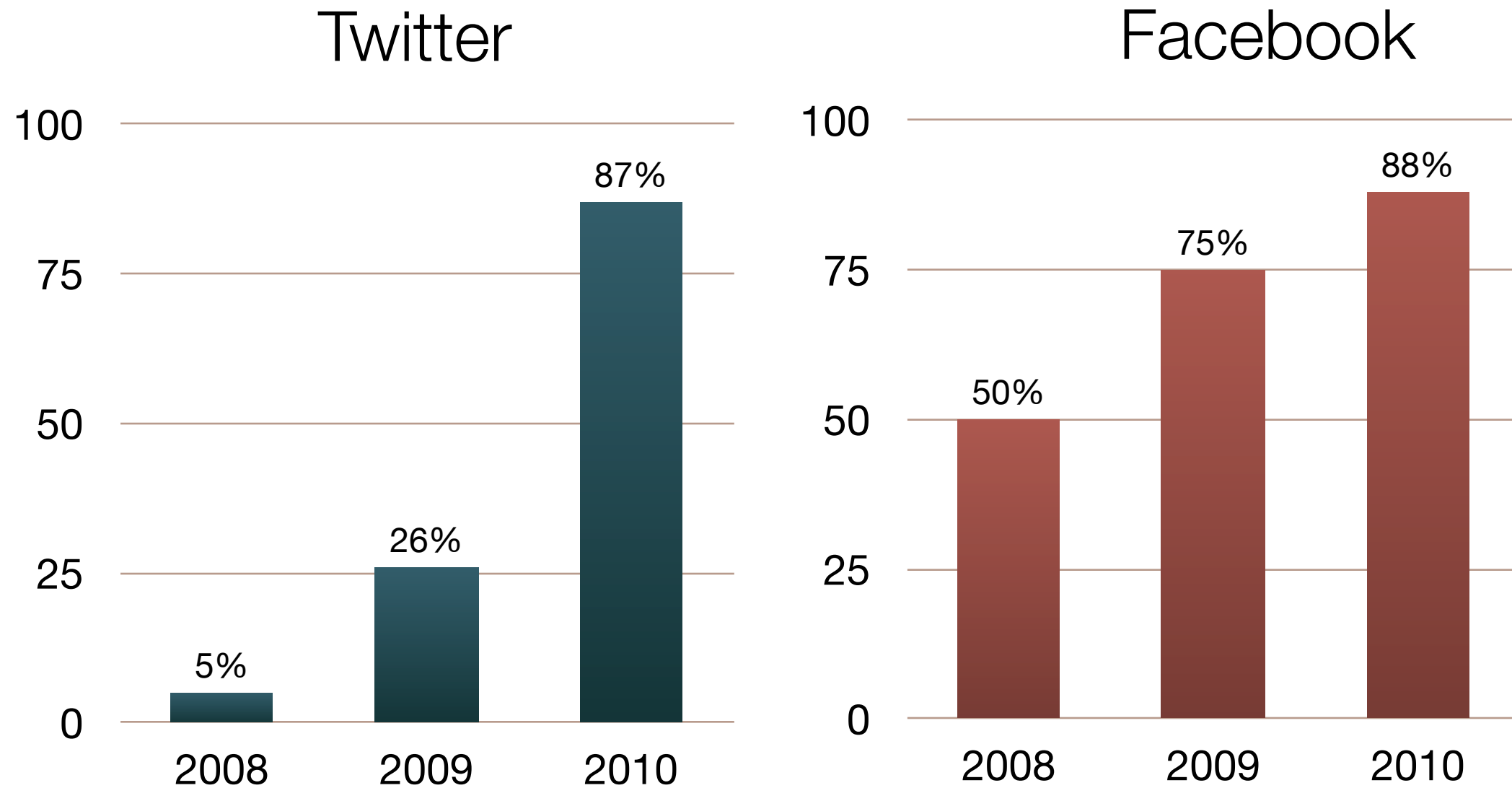
“How often do you use Twitter?”



Base: Have Ever Used Twitter

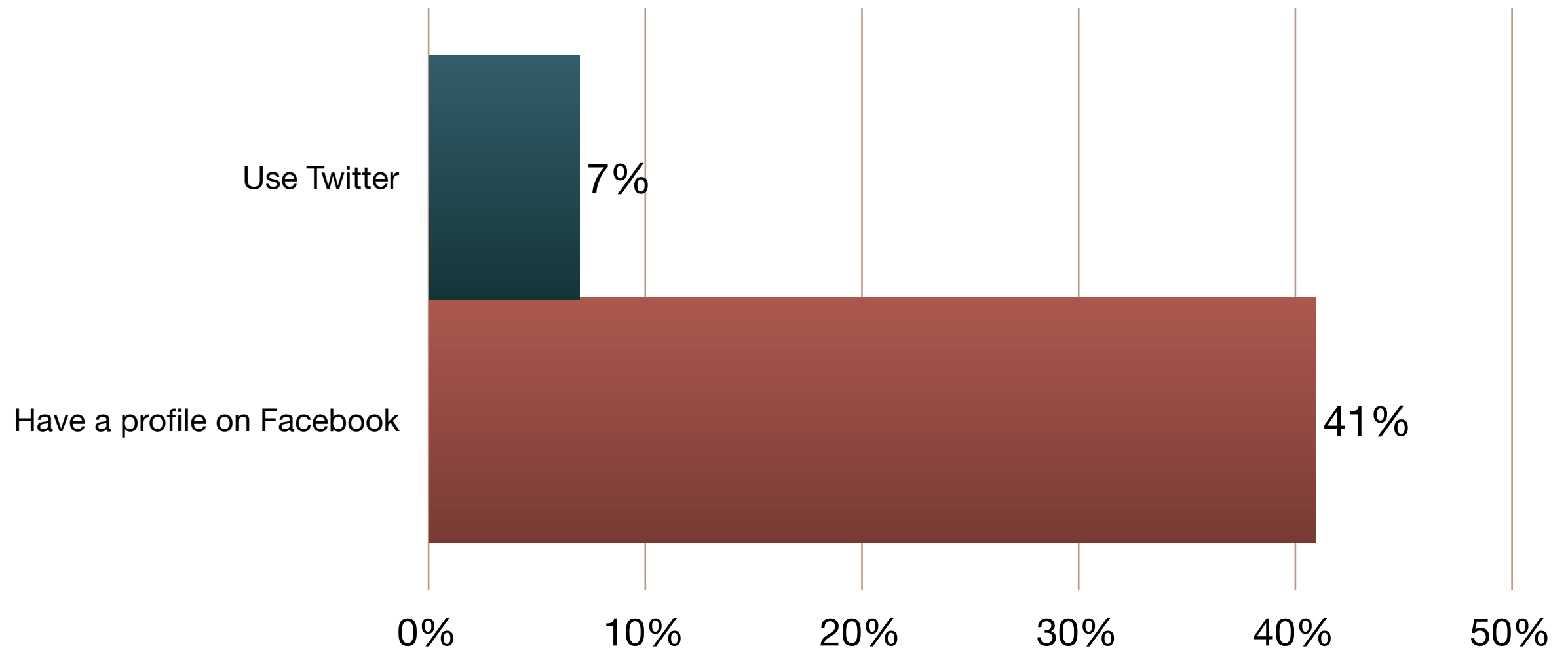
Twitter Has Caught Facebook In Awareness

% Who are aware of indicated service



Base: Total Population 12+

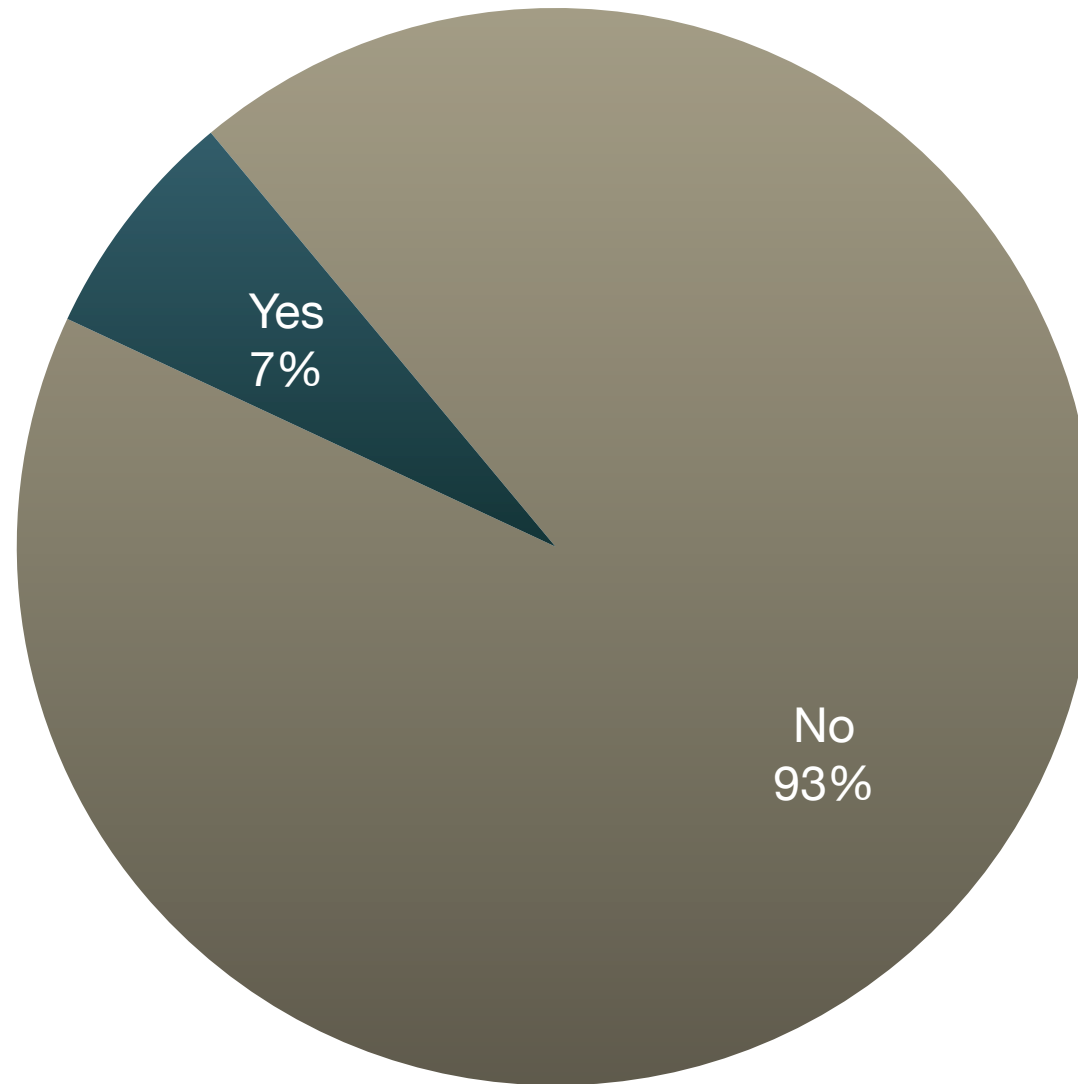
Despite Equal Awareness, Twitter Significantly Lags Facebook in Usage



Base: Total Population 12+

Location Apps Just Beginning To Become Known

“Are you familiar with social networking services that allow you to post a status update and your current location, such as FourSquare, Gowalla or Brightkite?”



Base: Total Population 12+

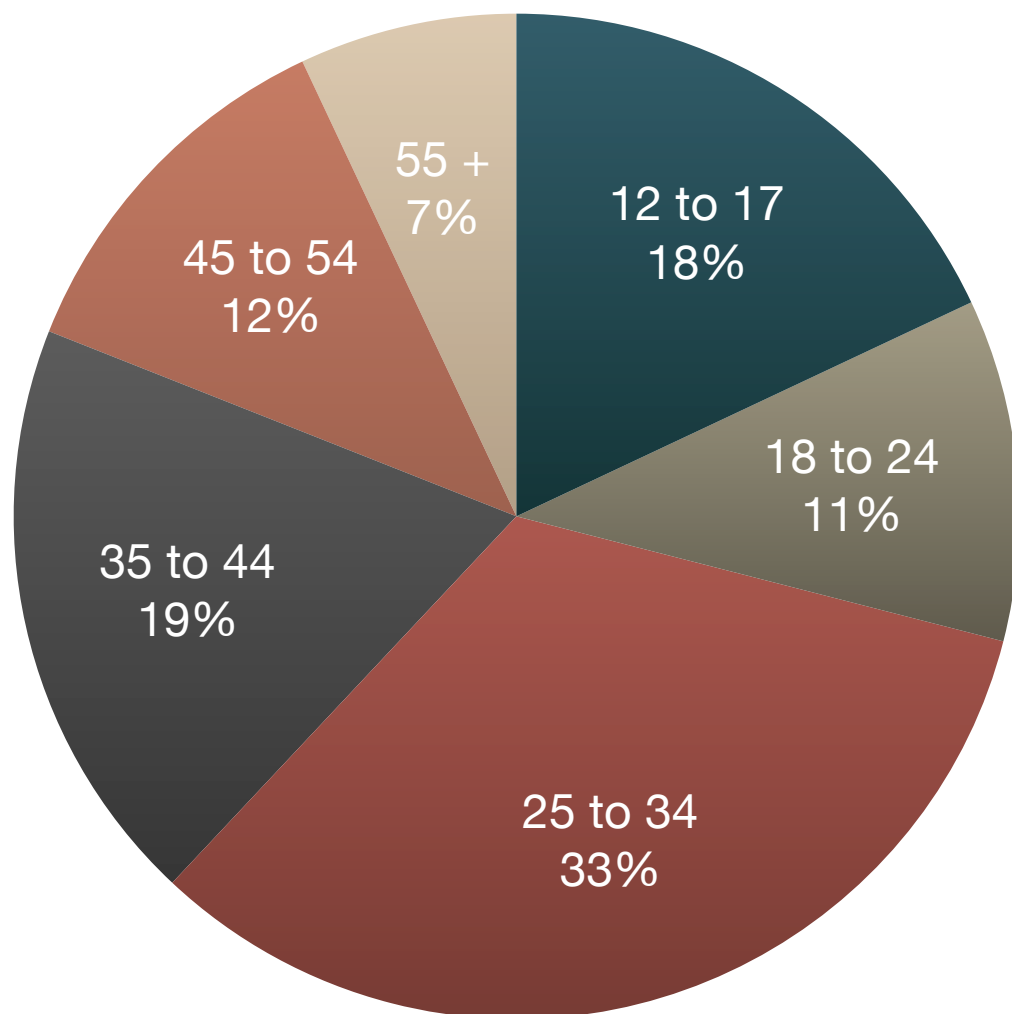


Twitter Users in America

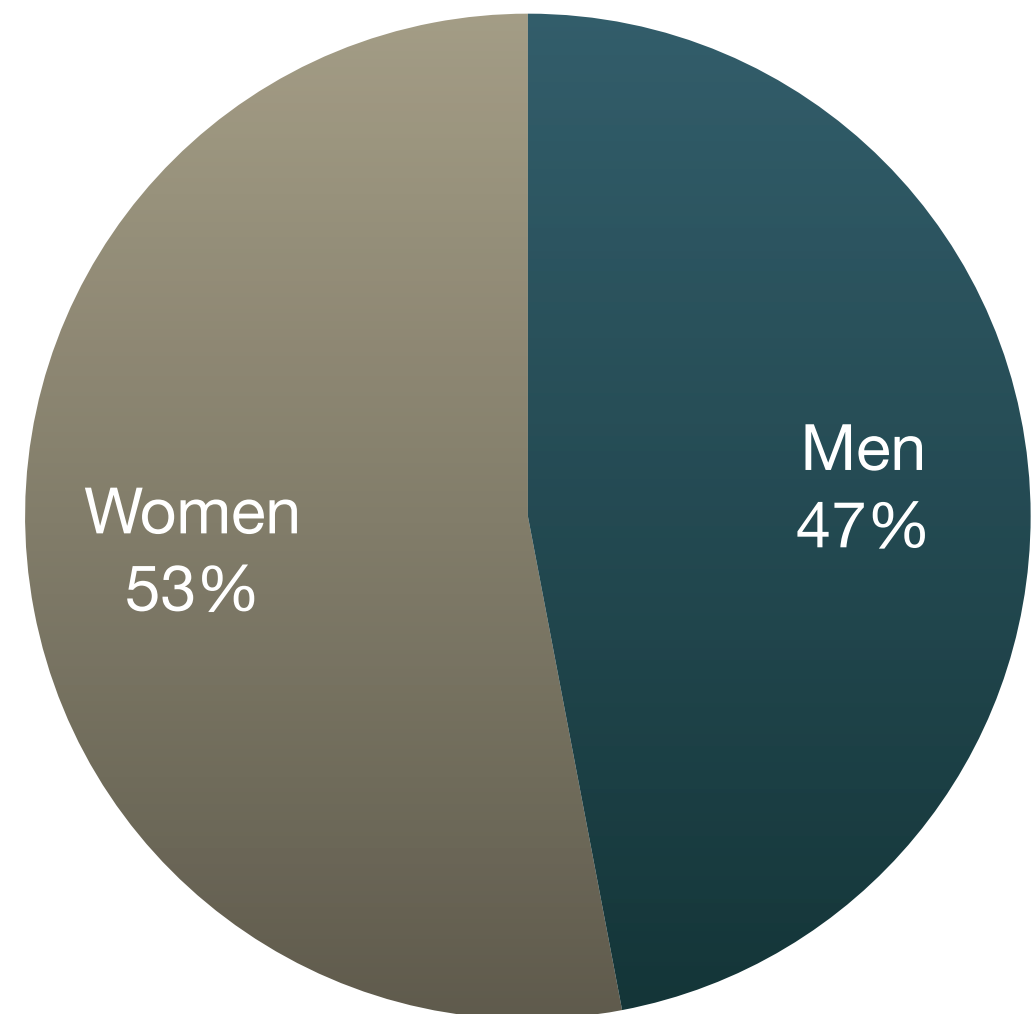


One in Three Monthly Twitter Users Between 25 and 34 Years of Age

Age

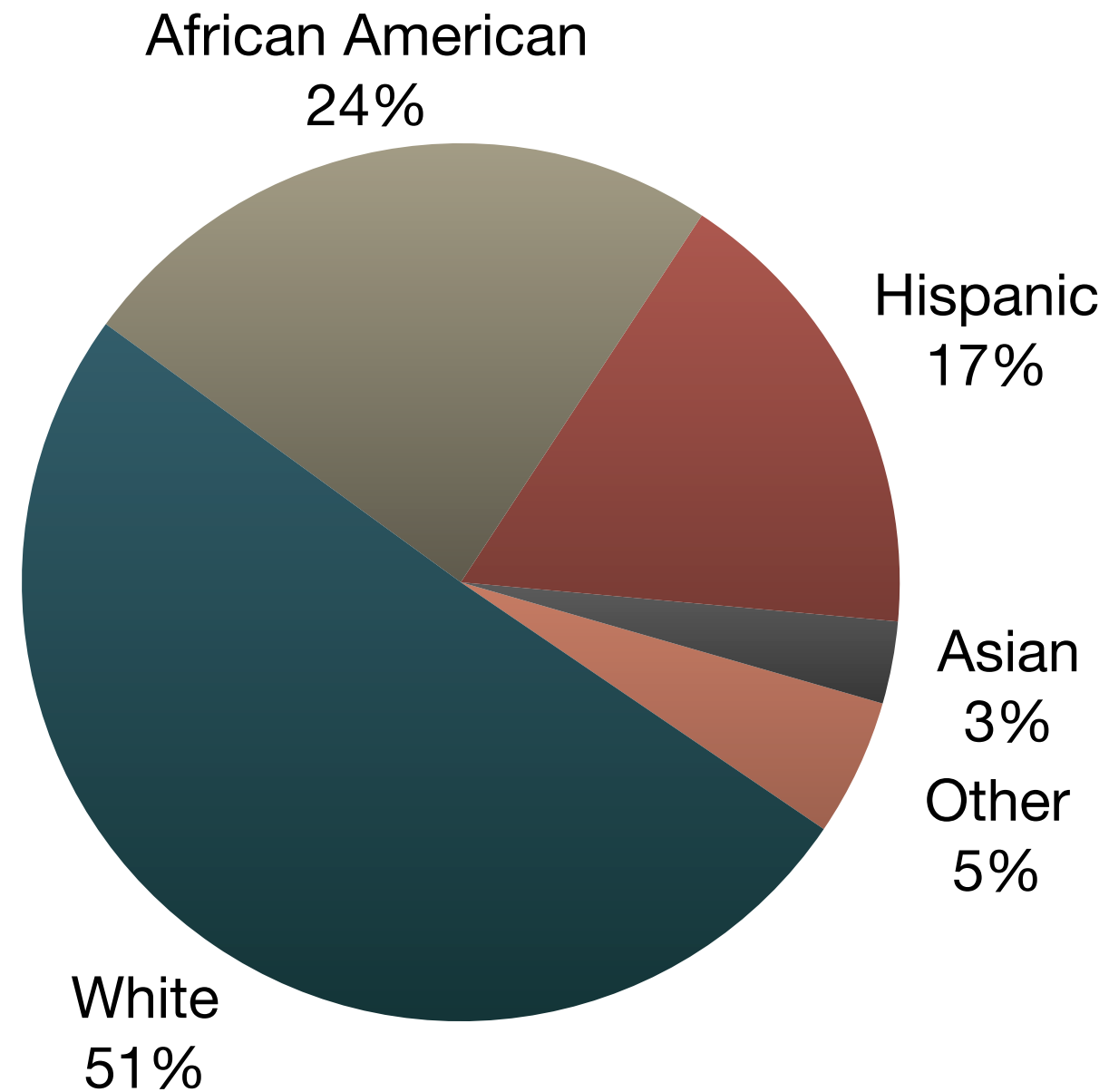


Sex



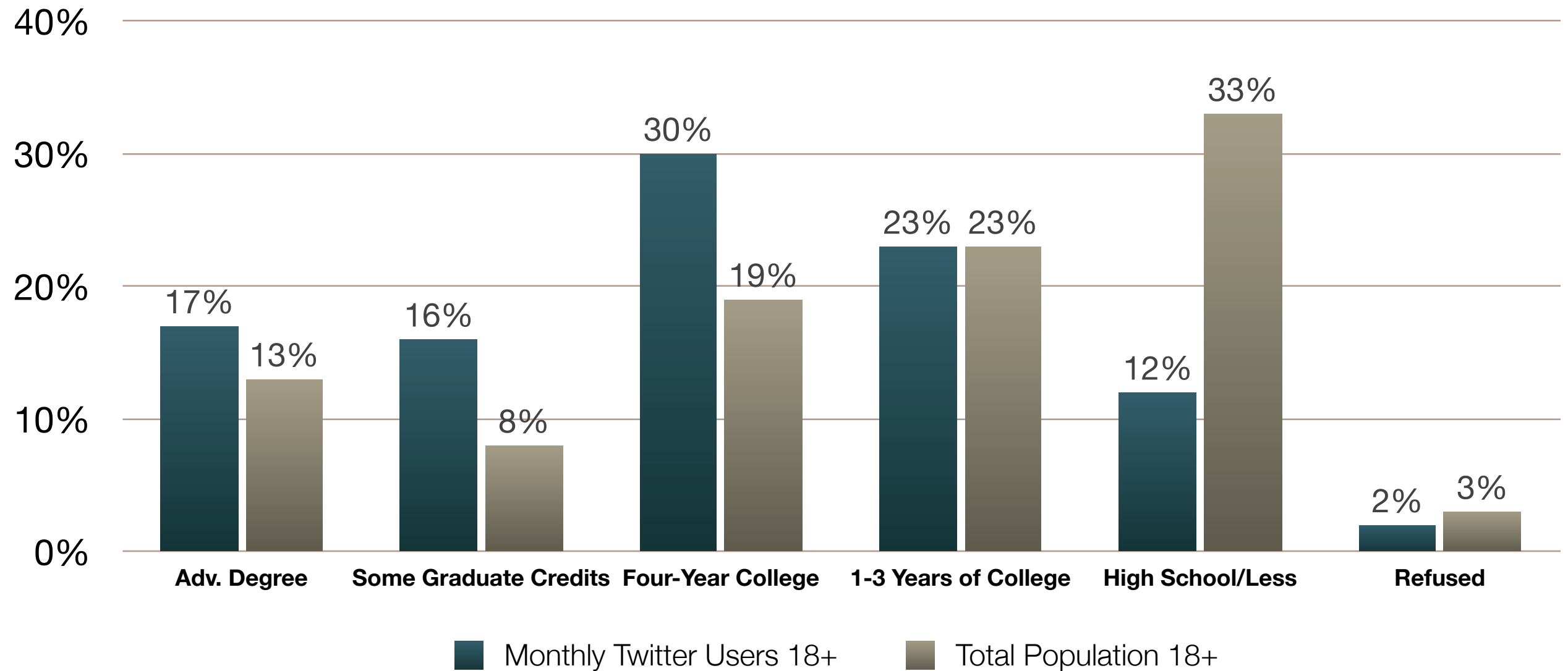
Base: Monthly Twitter Users

Twitter Users: Race/Ethnicity



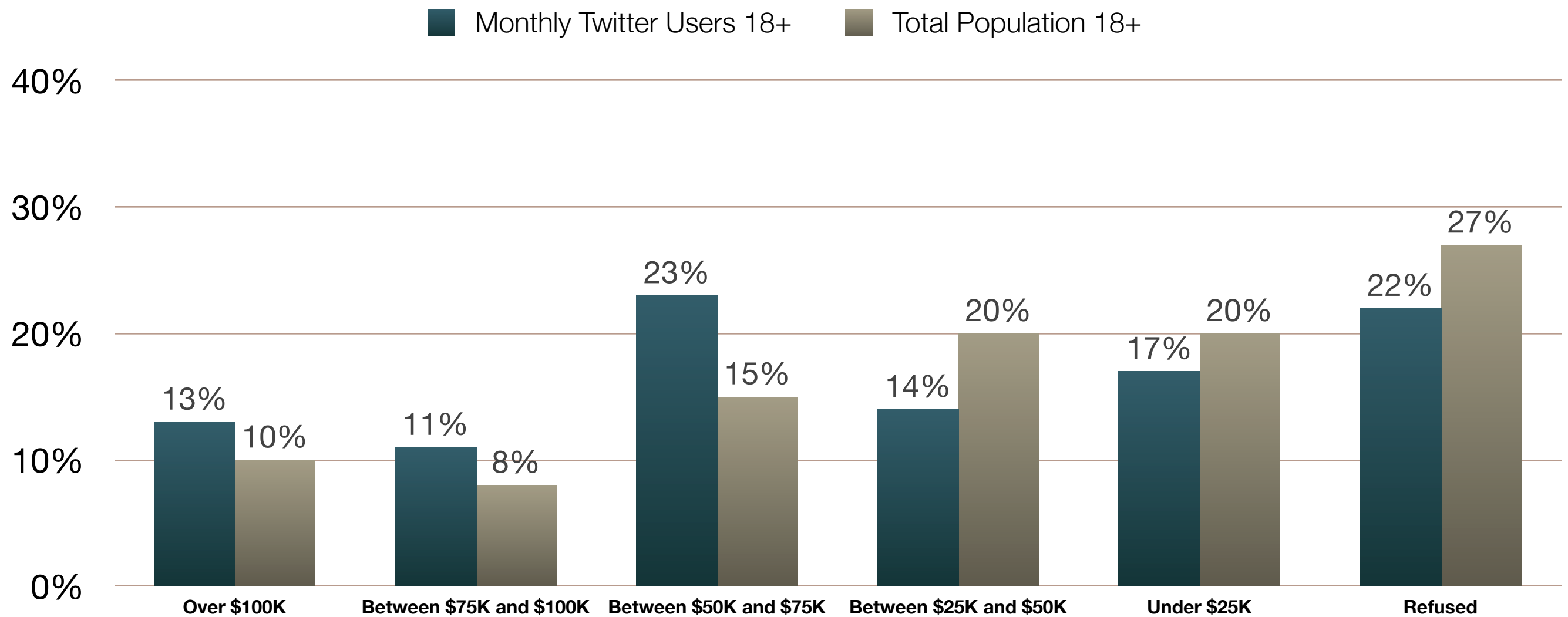
Base: Monthly Twitter Users

Twitter Users are Well-Educated



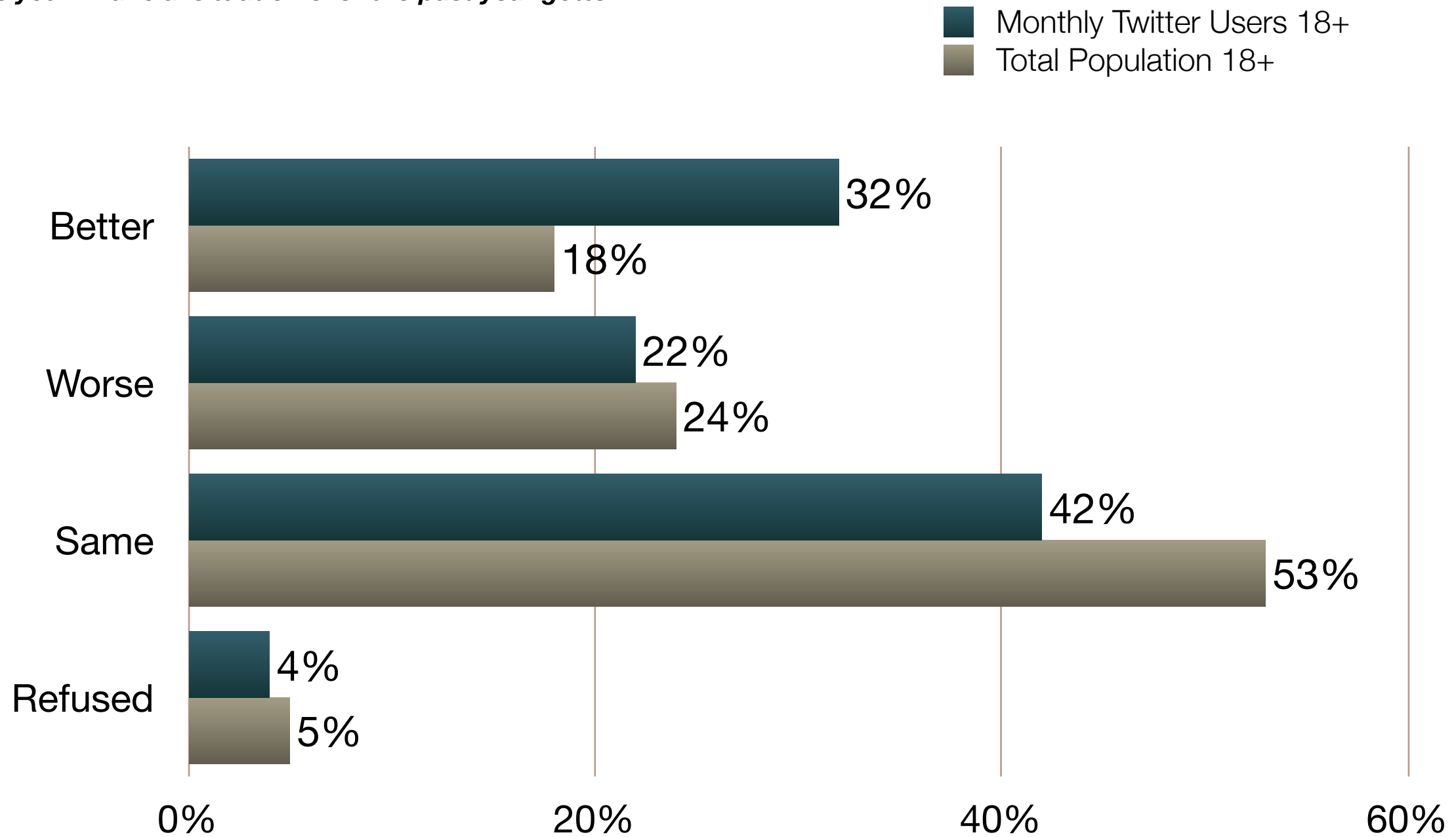
Twitter Users Are More Likely to Live in Higher Income Households

Annual Reported Household Income



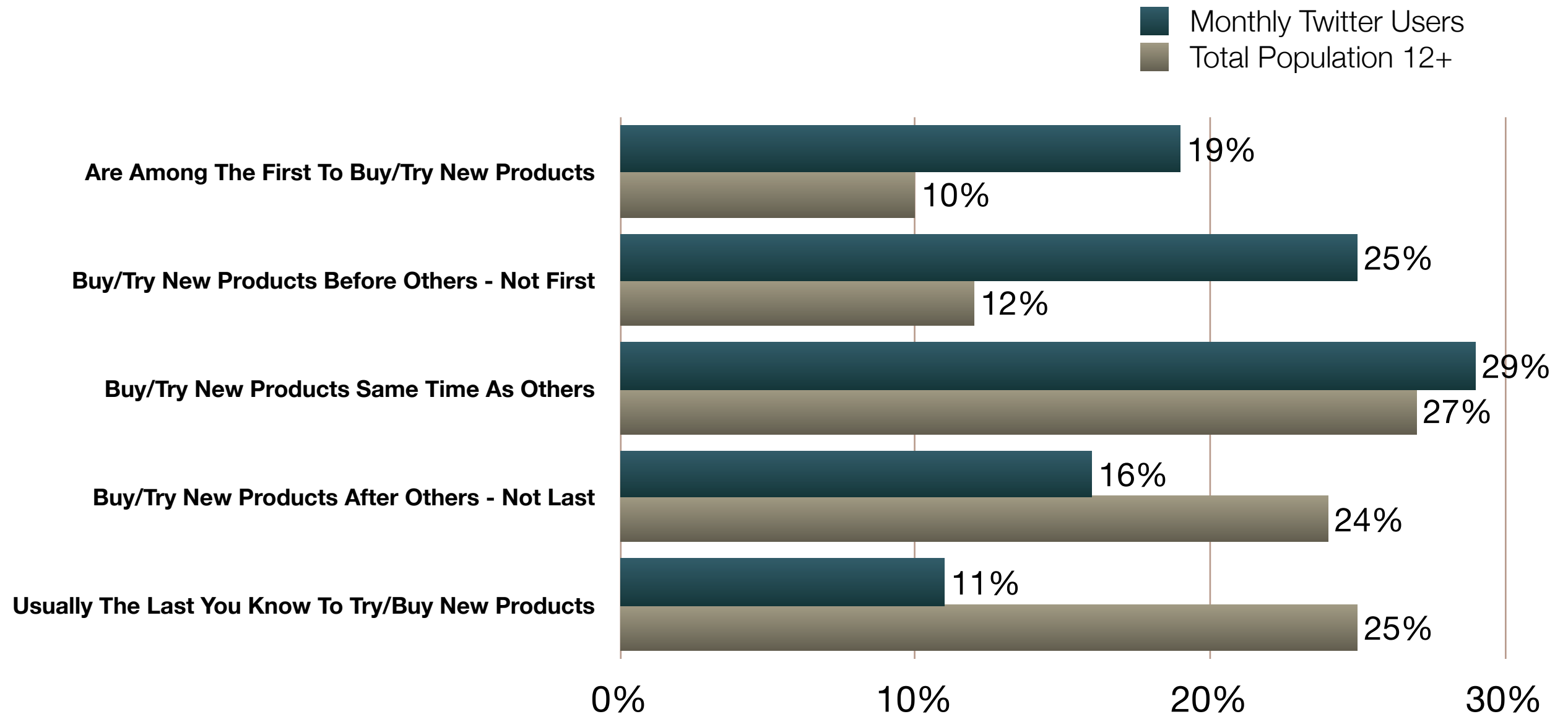
The “Twitter Economy” Seems On The Rise

“Has your financial situation over the past year gotten...”



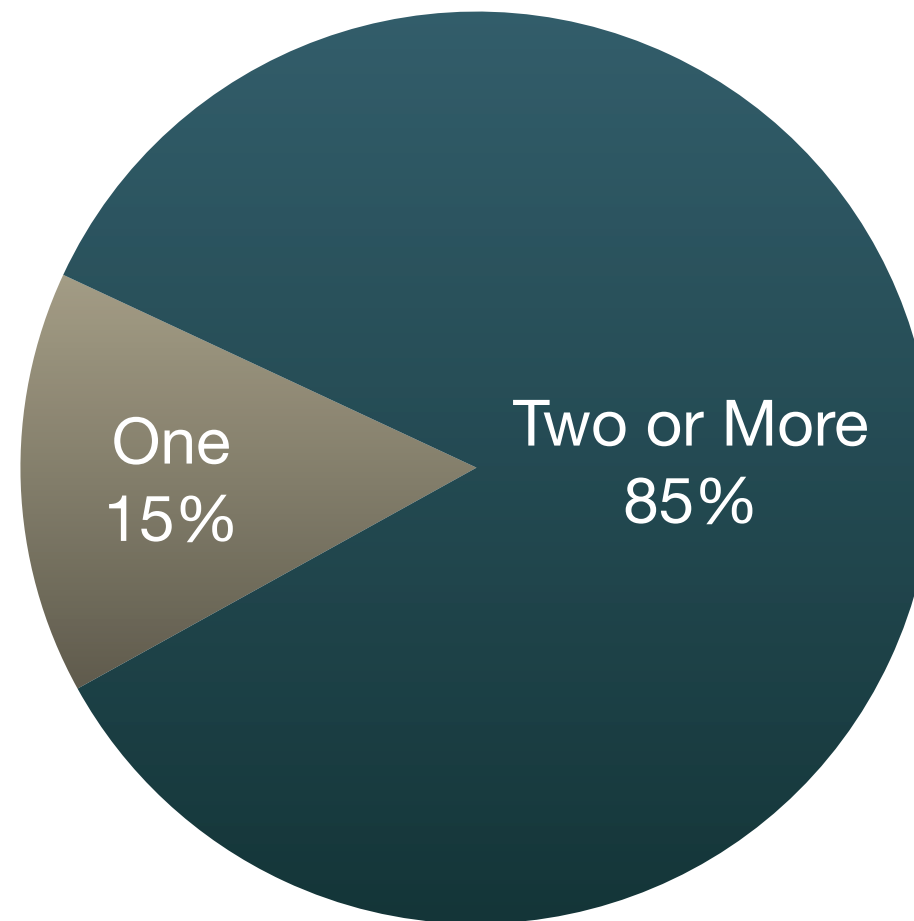
Twitter Users Index As Early Adopters

“Think about when you buy or try new products and services compared to other people you know. In general, would you say that you...?”



Twitter Users Access The Internet From Multiple Locations

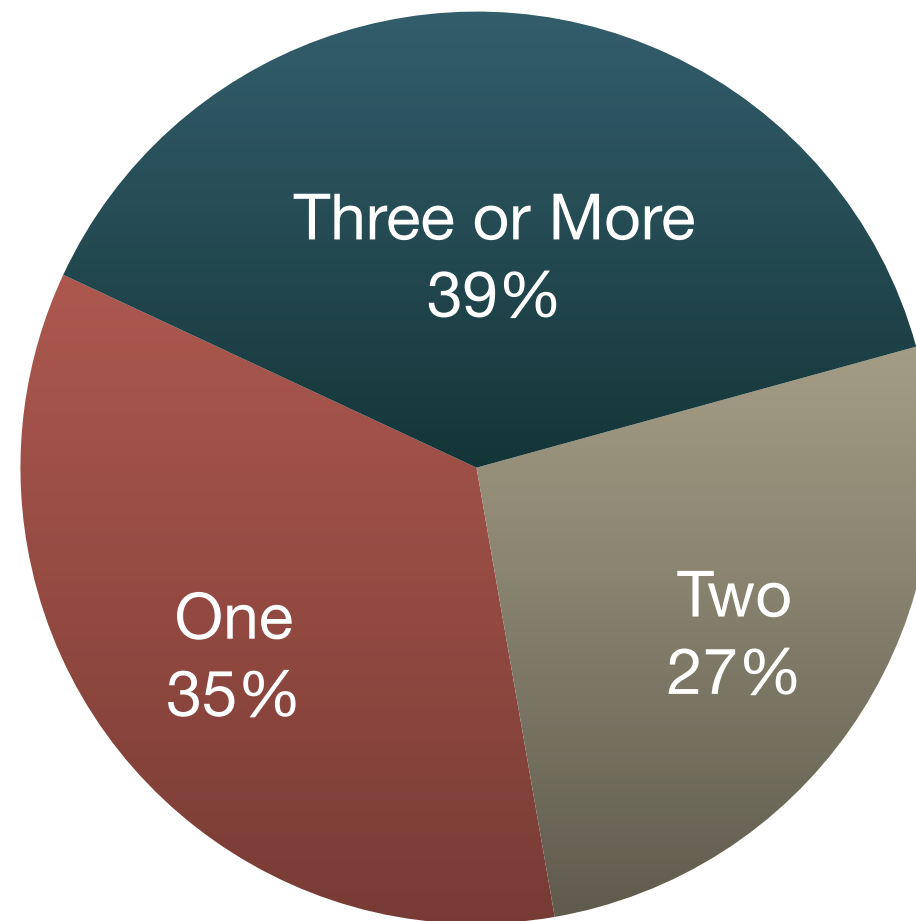
“From how many locations do you typically access the Internet?”



Base: Monthly Twitter Users

Four In Ten Twitter Users Own At Least Three Computers

“How many working computers do you have in your home?”

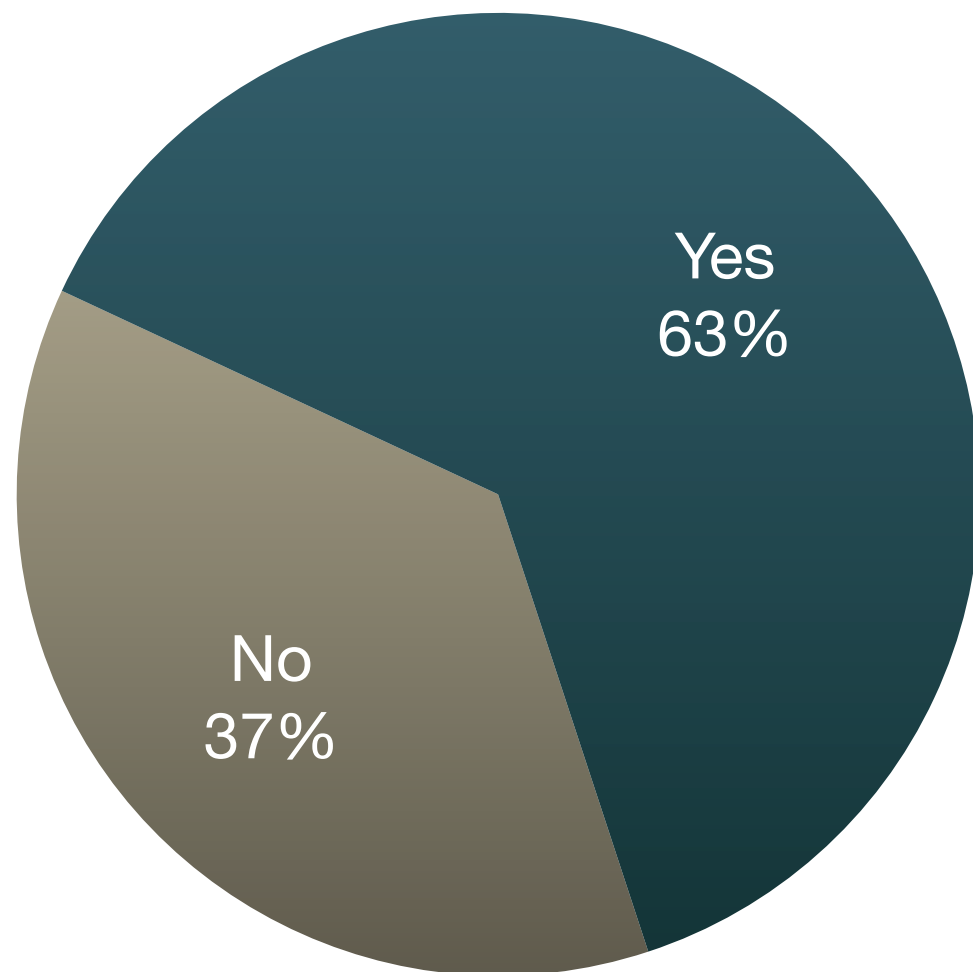


Base: Monthly Twitter Users

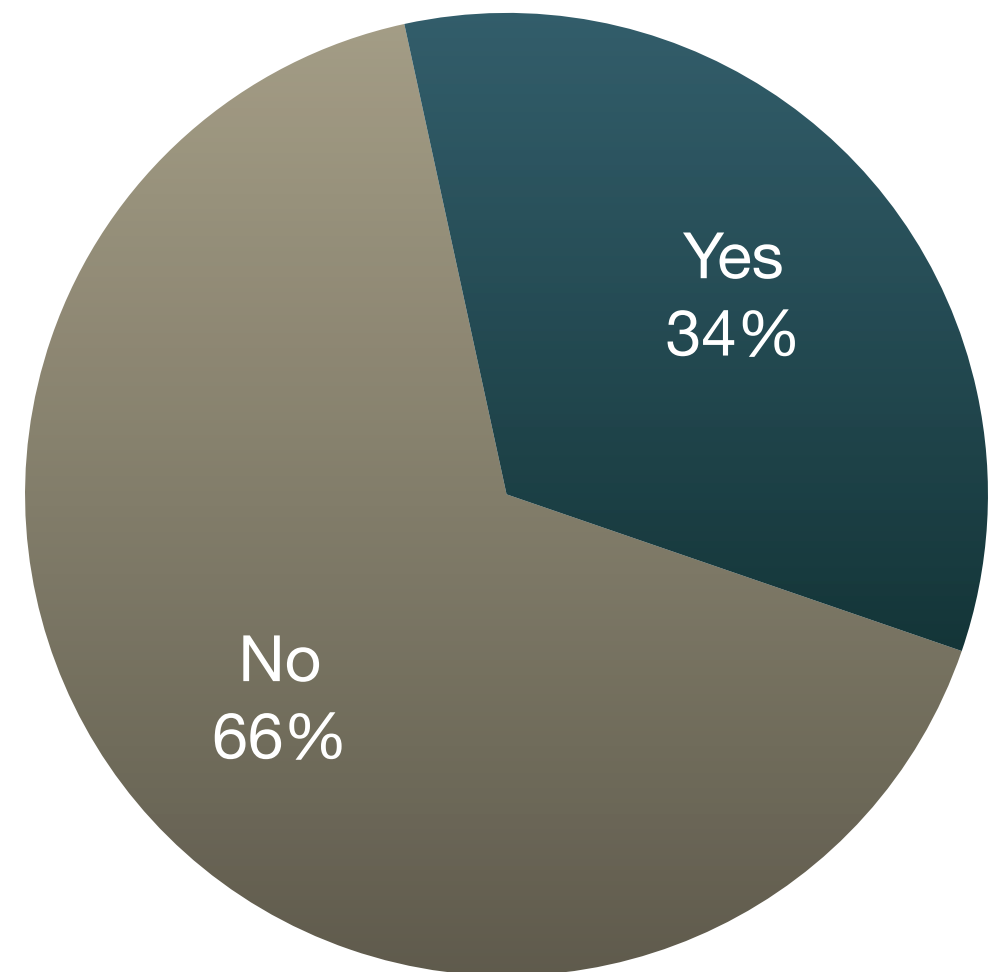
Twitter Users Comfortable Accessing Social Networking Services Via Mobile Phone

"Do you ever access social networking sites via mobile phone?"

Monthly Twitter Users

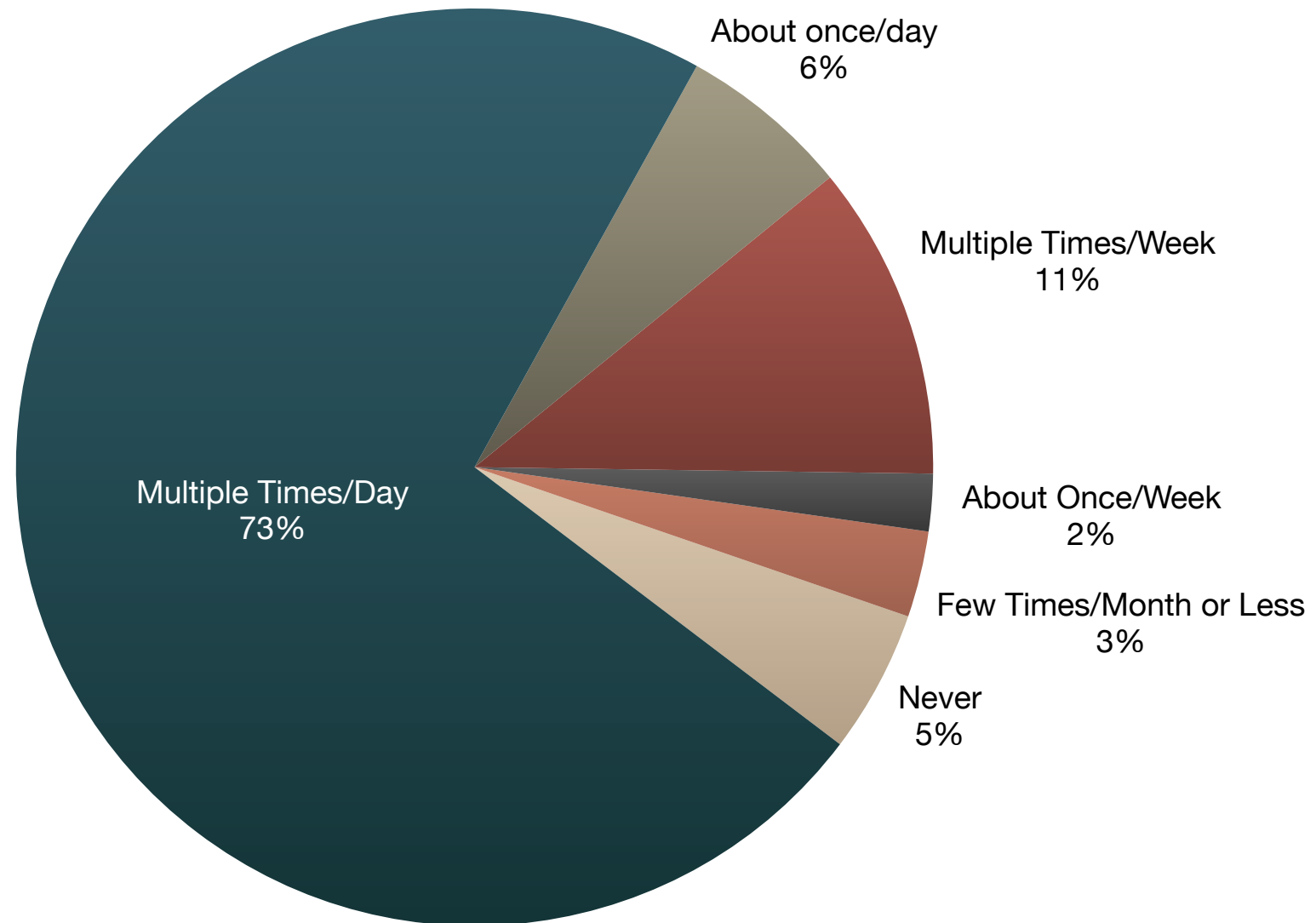


All Social Network Users



Twitter Users (Like Most Americans) Are *Very* Frequent SMS Users

“How often do you send/receive text messages on your cell phone?”



*Base: Monthly Twitter Users
Who Own a Mobile Phone*



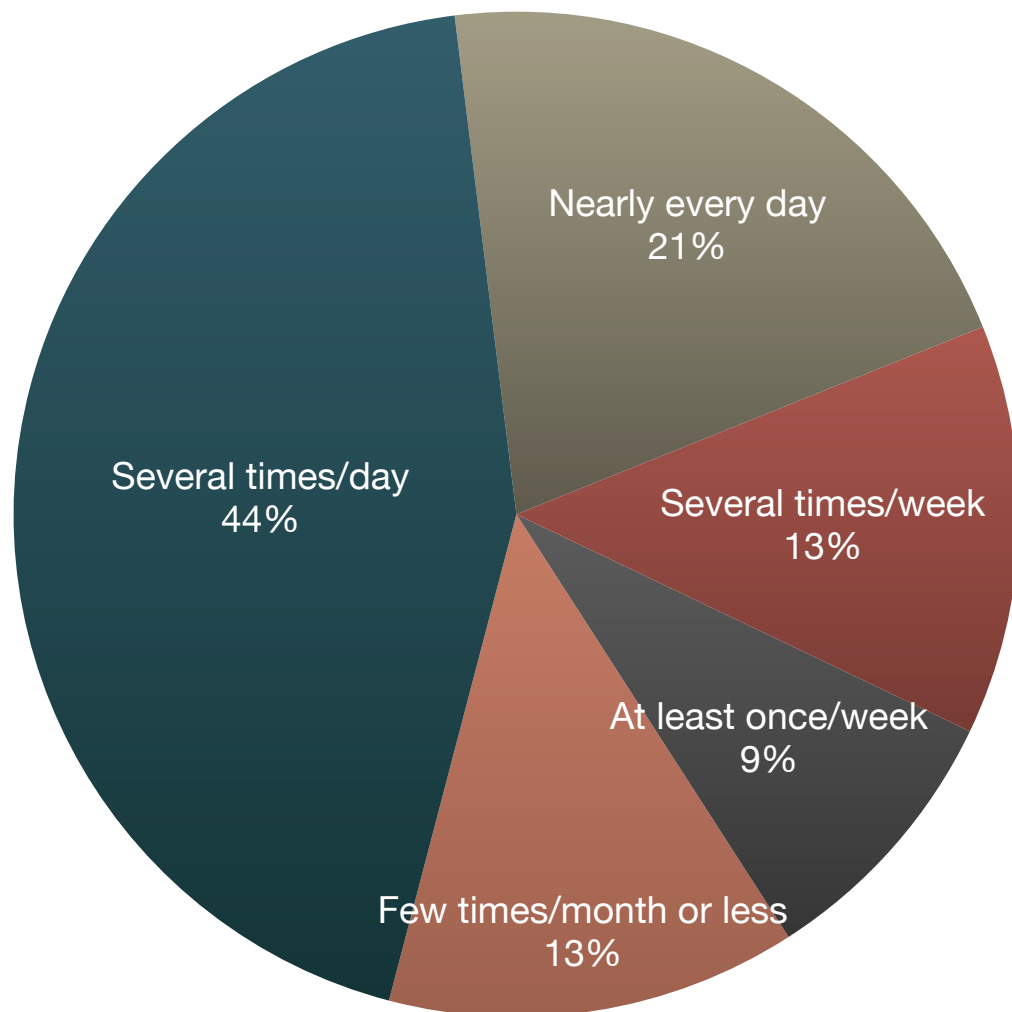
Twitter Usage Behaviors



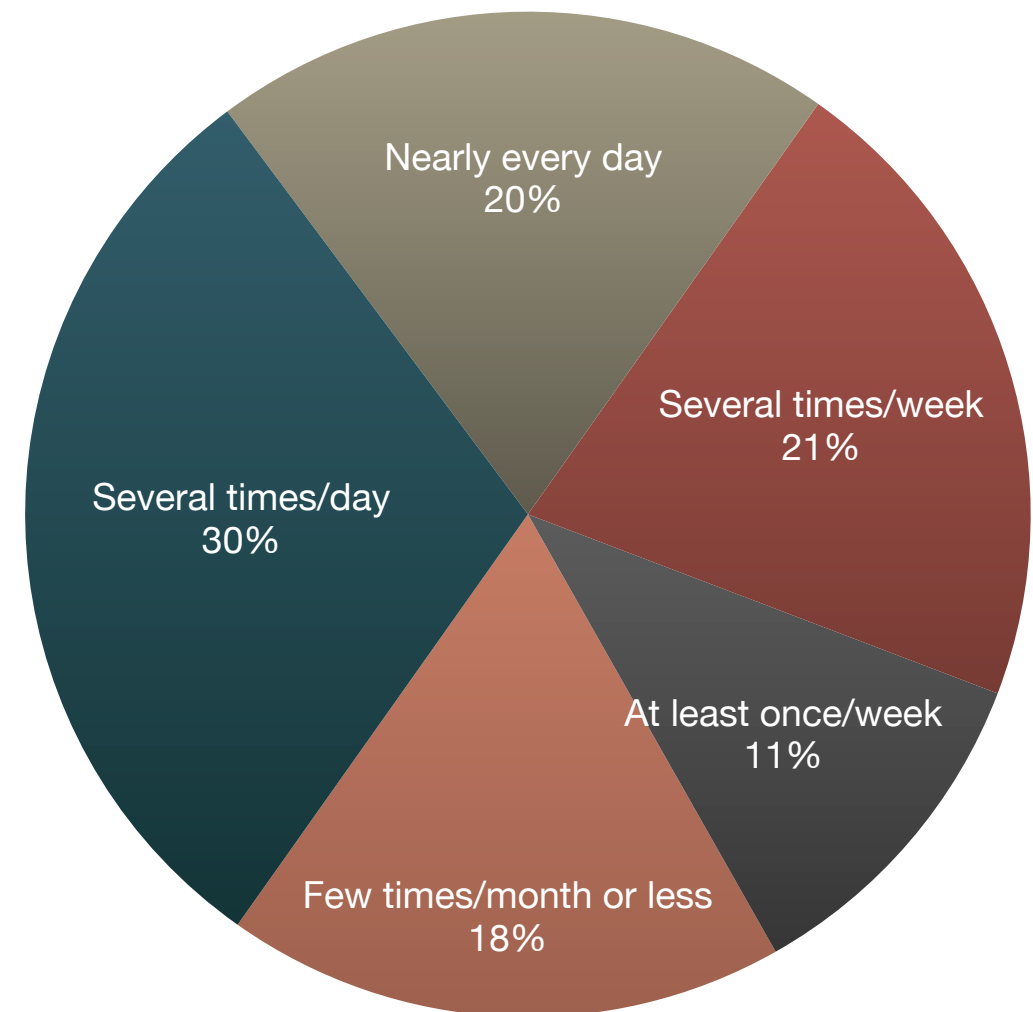
Twitter Users Far More Frequent Users of All Social Networking Sites/Services

“How often do you use social networking Web sites/services?”

Monthly Twitter Users



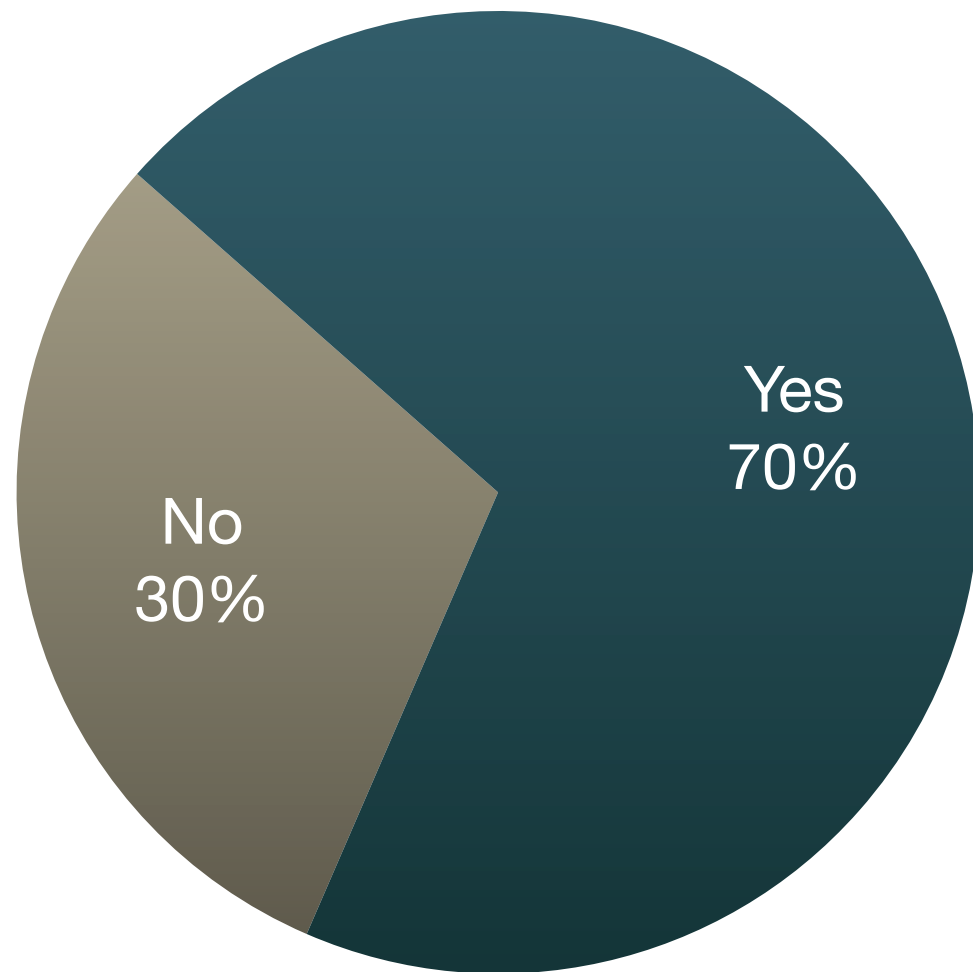
All Social Network Users



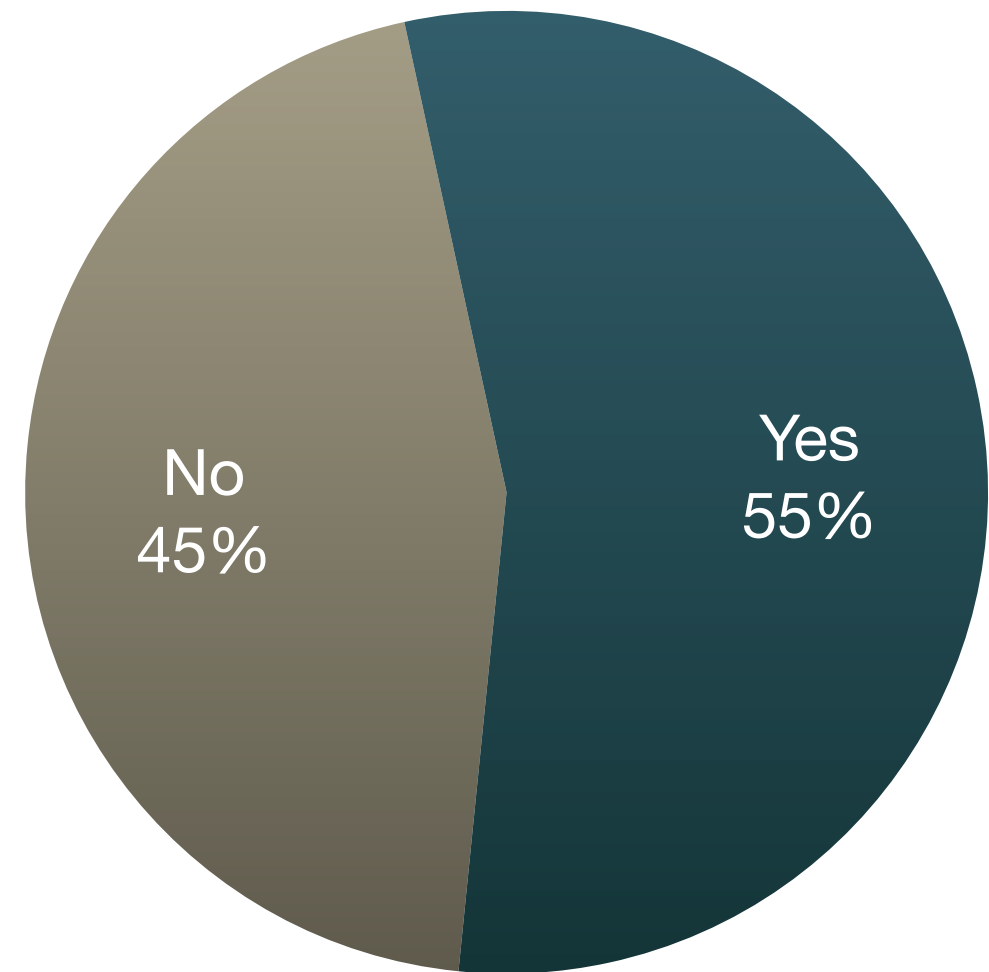
Regular Twitter Users More Likely To Be ‘Status Updaters’ Across All Social Networking Services

“Do you ever update your status on social networking sites/services?”

Monthly Twitter Users

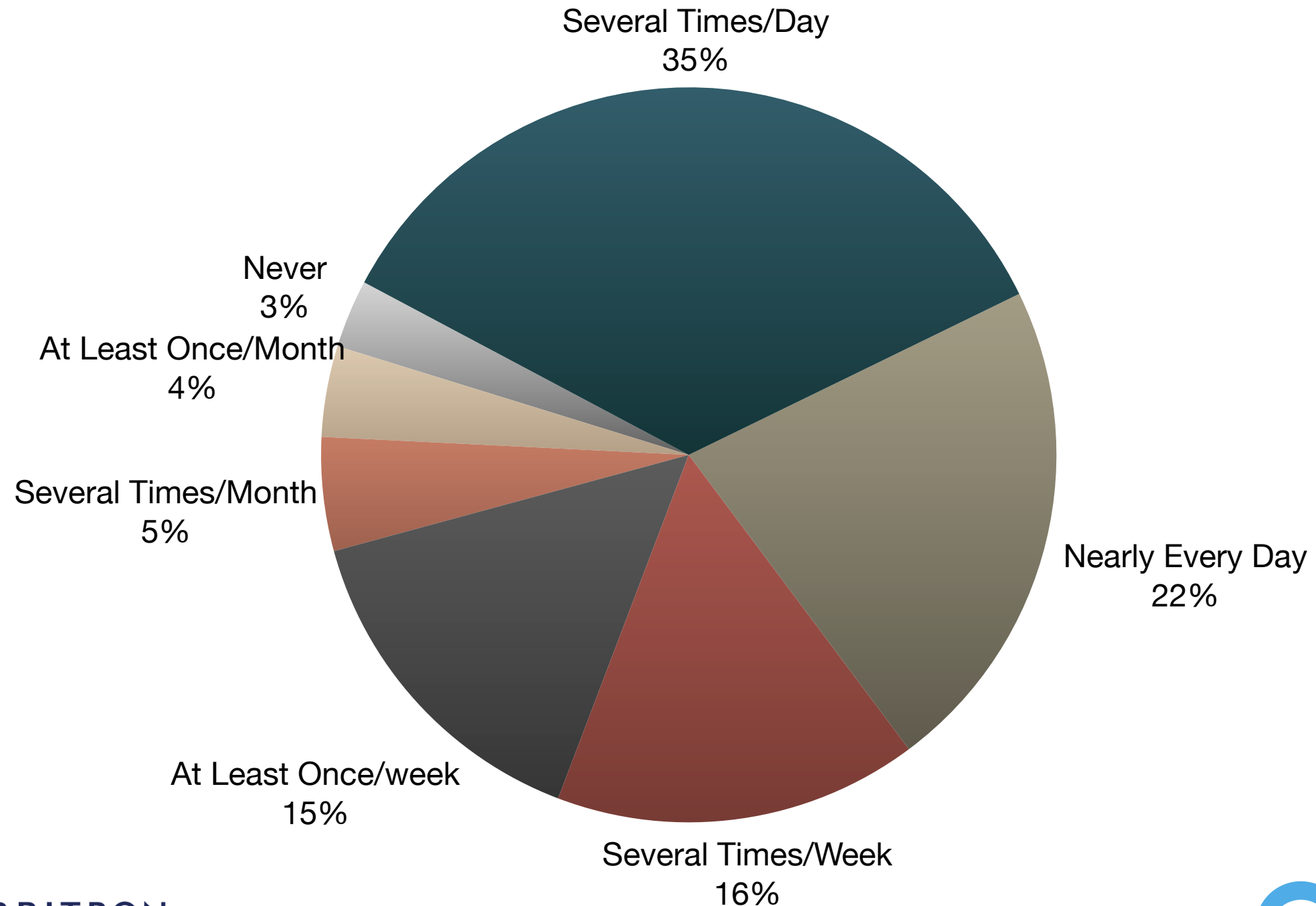


All Social Network Users



Status Updating Behaviors - Online

“How often do you go to the social networking Web site to update your status?”

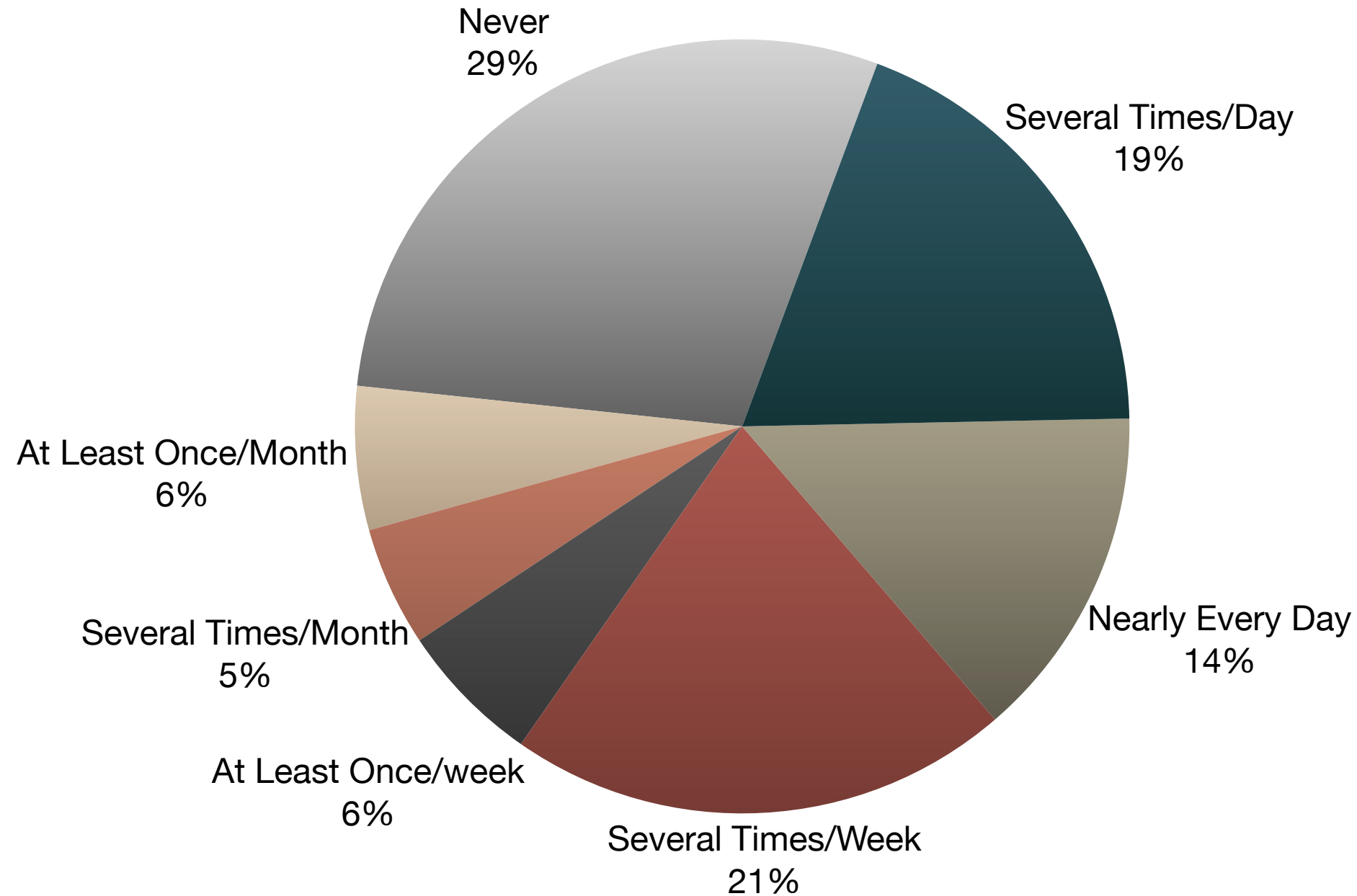


Base: Monthly Twitter Users Who Post Status Updates to Social Networking Web Sites



Status Updating Behaviors - Mobile

"How often do you update your status on social networking sites using a mobile phone?"

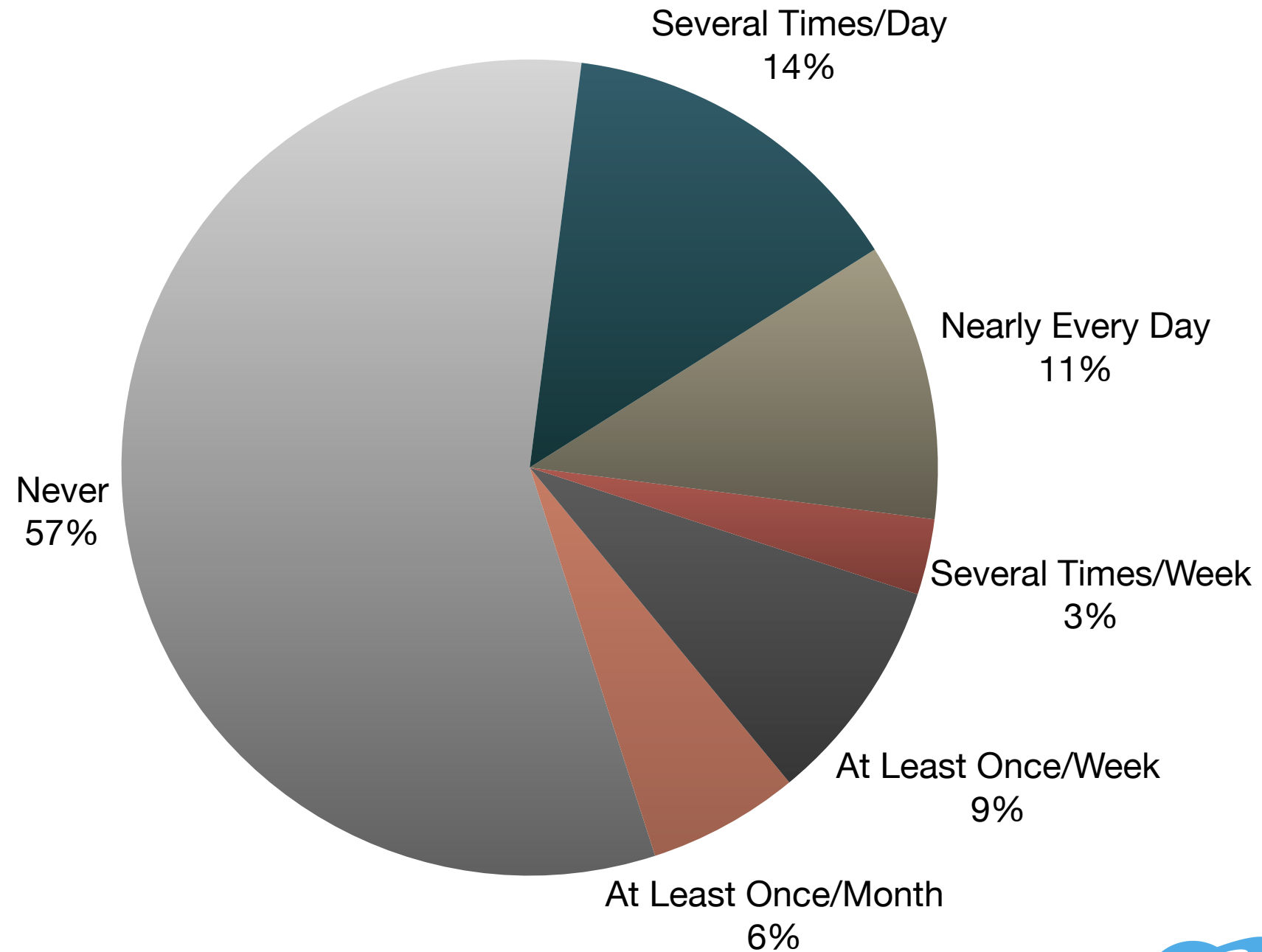


Base: Monthly Twitter Users Who Post Status Updates to Social Networking Web Sites



Status Updating Behaviors - Clients

“How often do you update your status on social networking sites with a dedicated application on your computer, that is, NOT through a Web browser?”

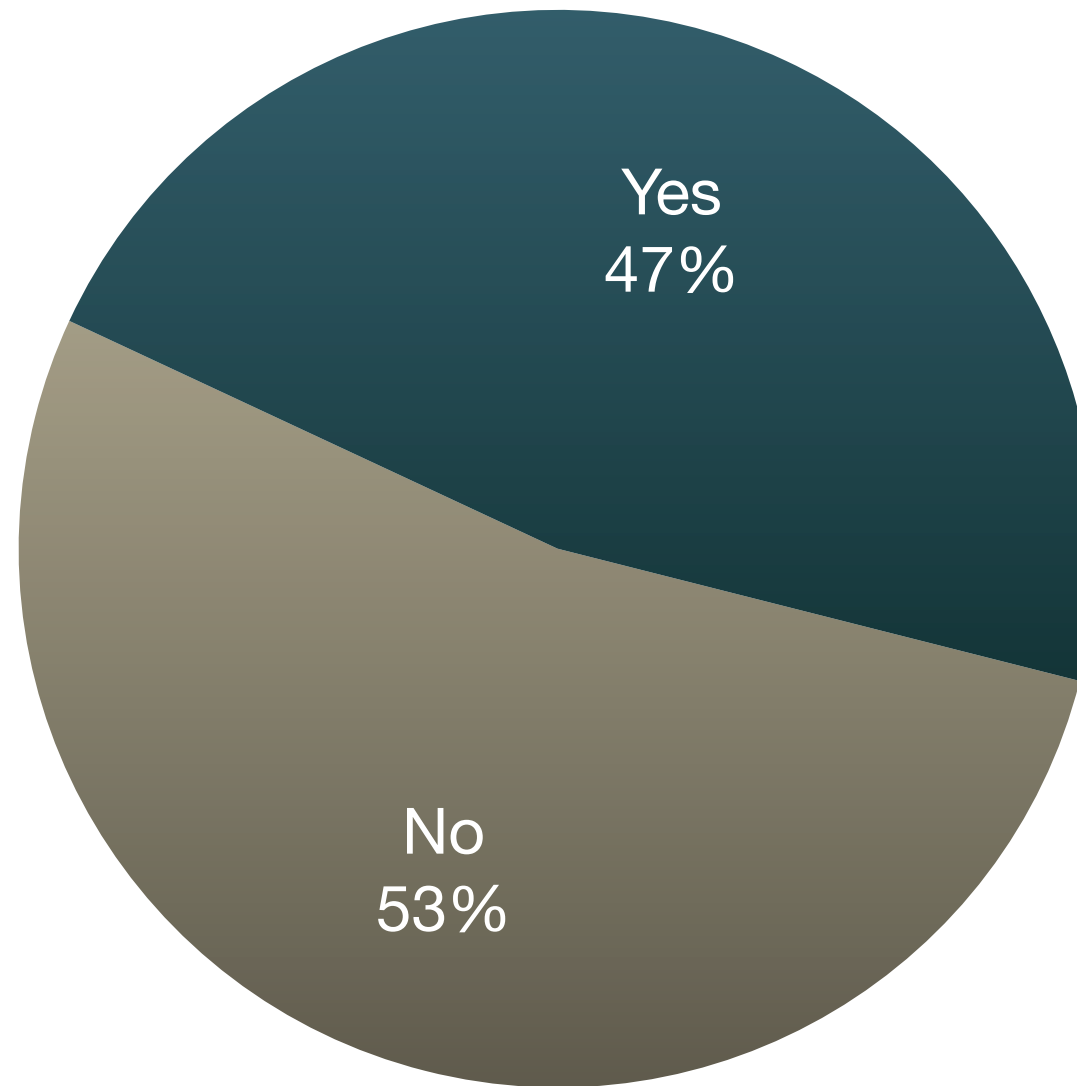


Base: Monthly Twitter Users Who Post Status Updates to Social Networking Web Sites



Just Under Half Of Regular Users Post Status Updates To Twitter

"Do you ever post status updates to Twitter?"



Base: Monthly Twitter Users

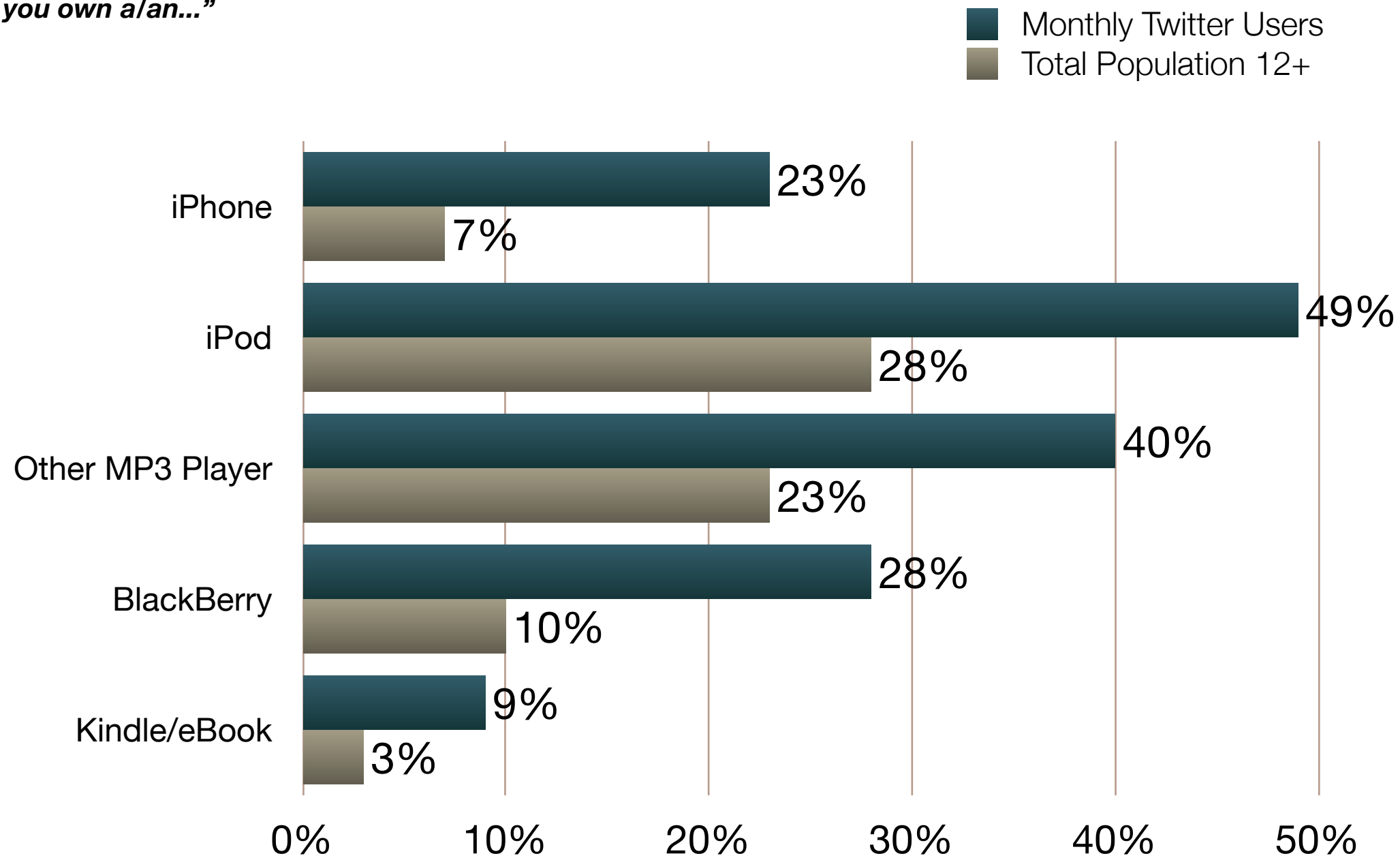


Other Attitudes/Behaviors



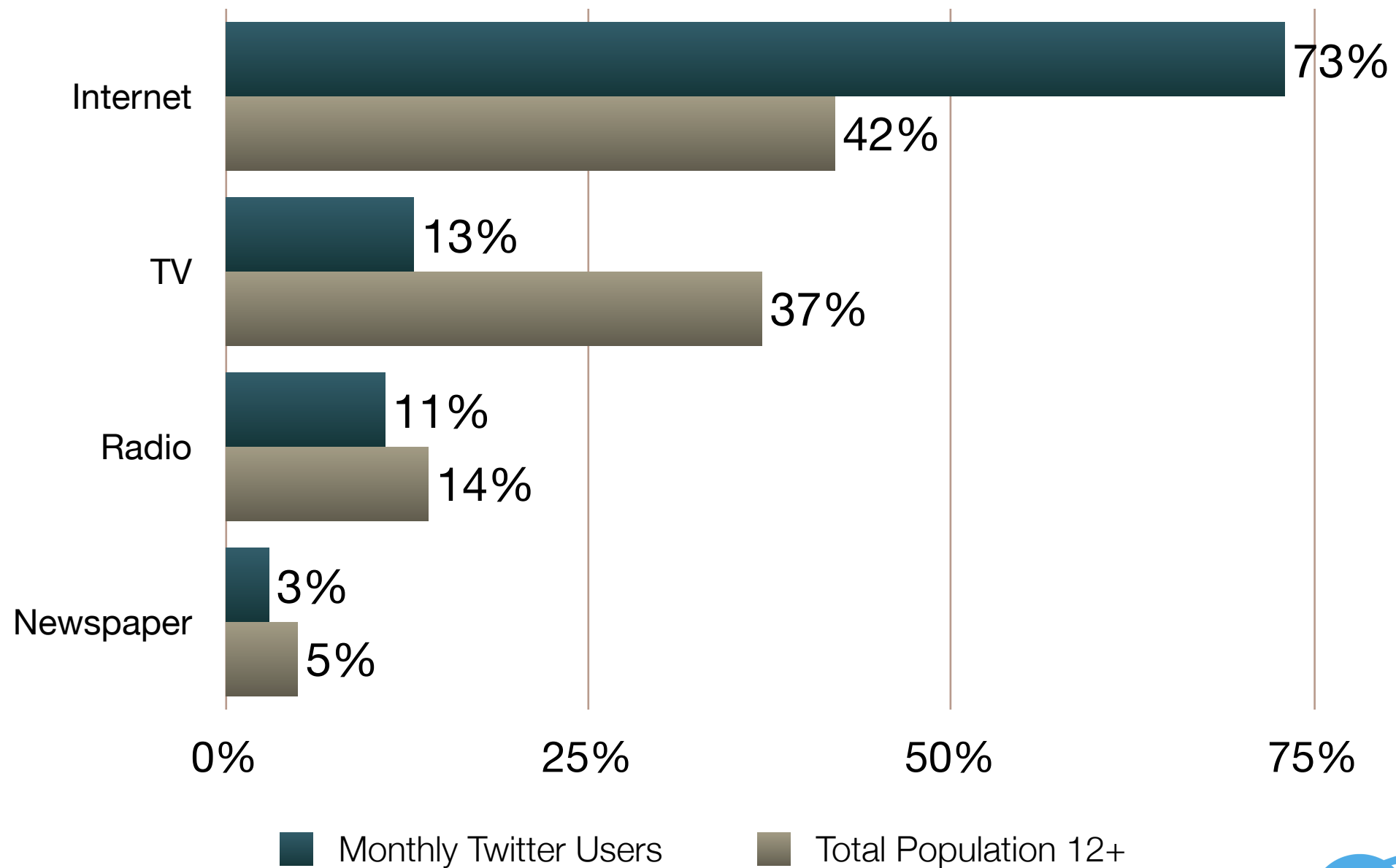
Regular Twitterers Index Very Highly For Technology Ownership

"Do you own a/an..."



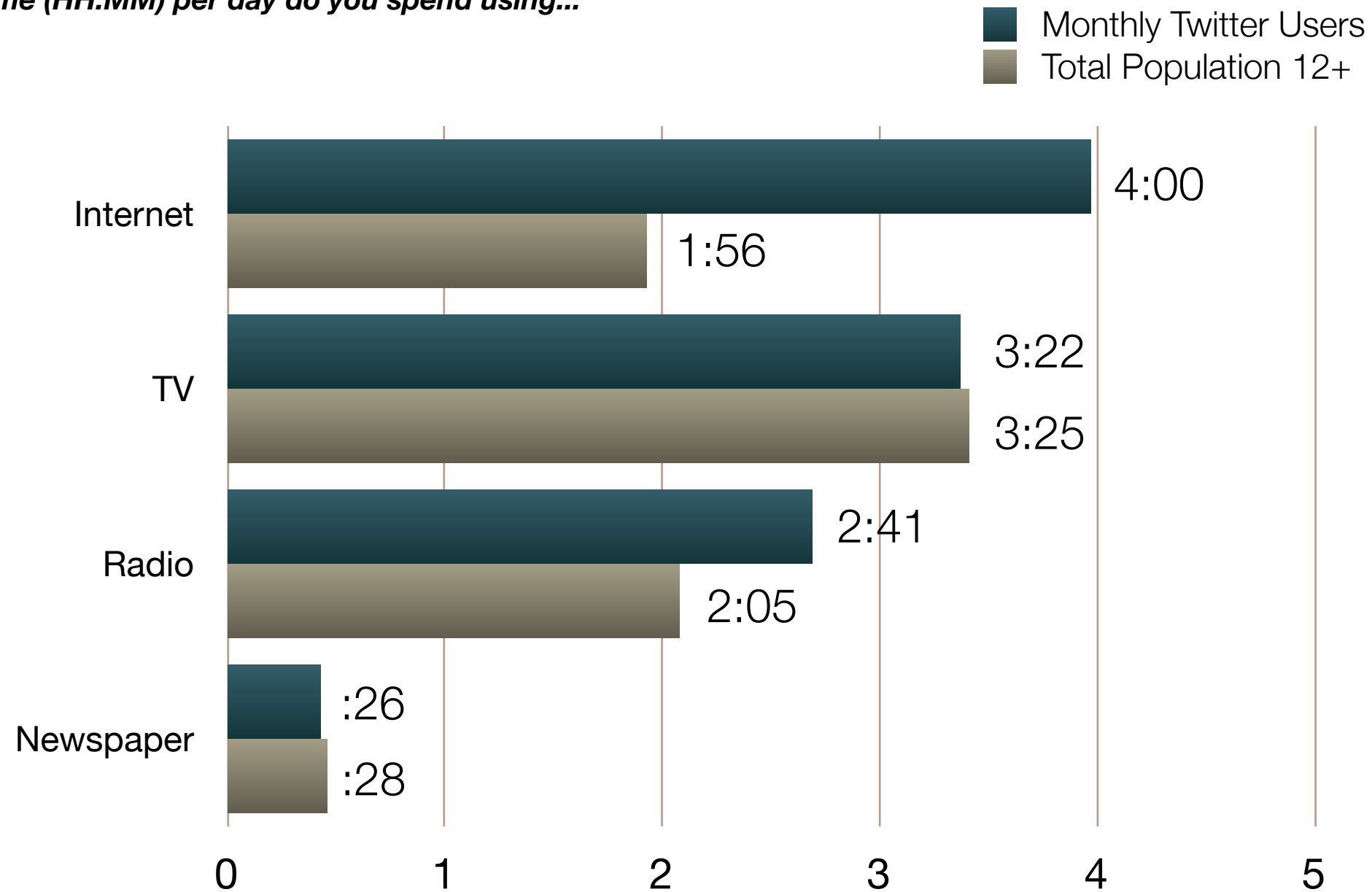
Internet Most Essential To Regular Twitter Users

“Which medium is MOST essential to your life?”



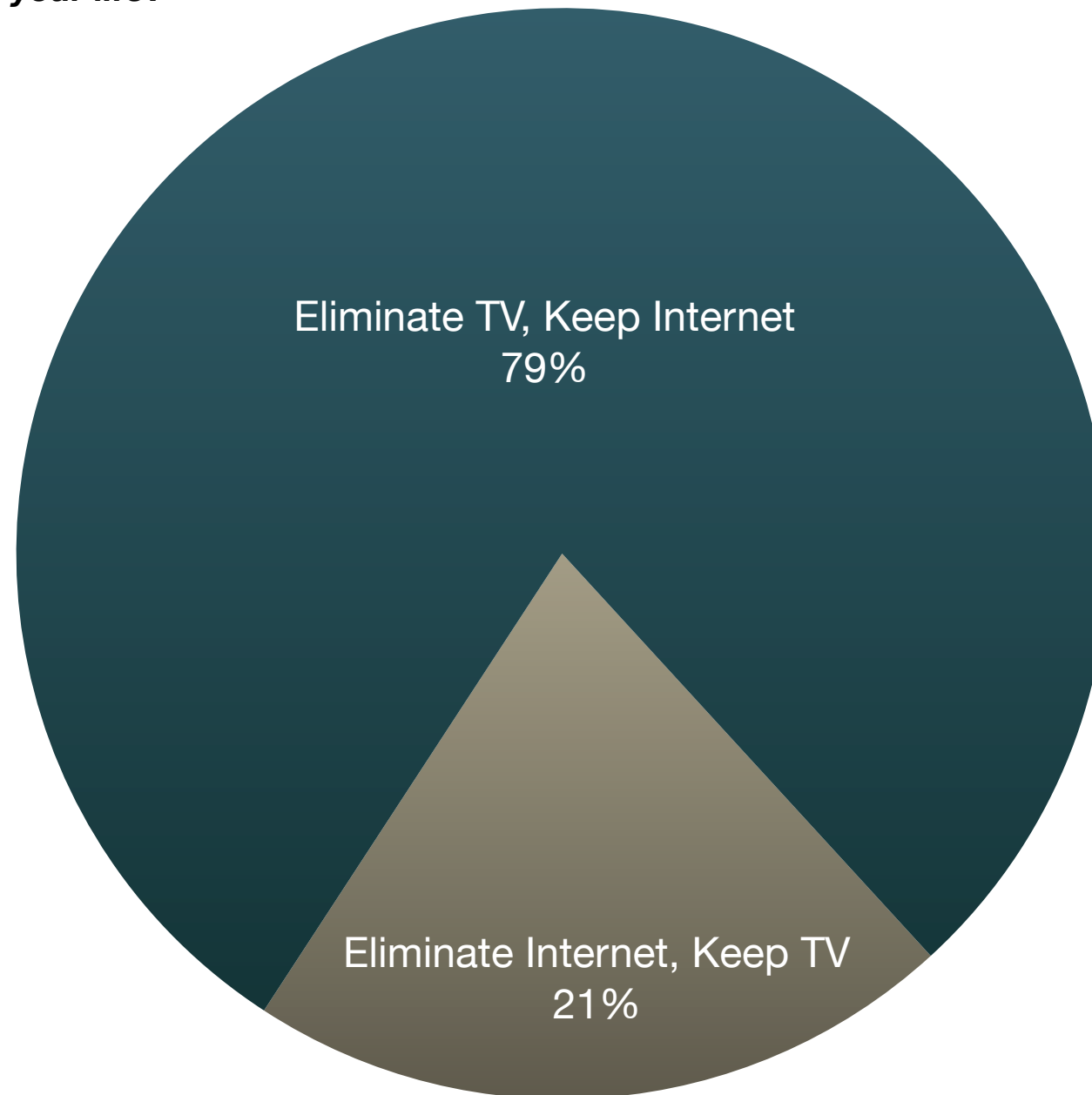
Internet Usage Extremely High Among Regular Users of Twitter

"How much time (HH:MM) per day do you spend using..."



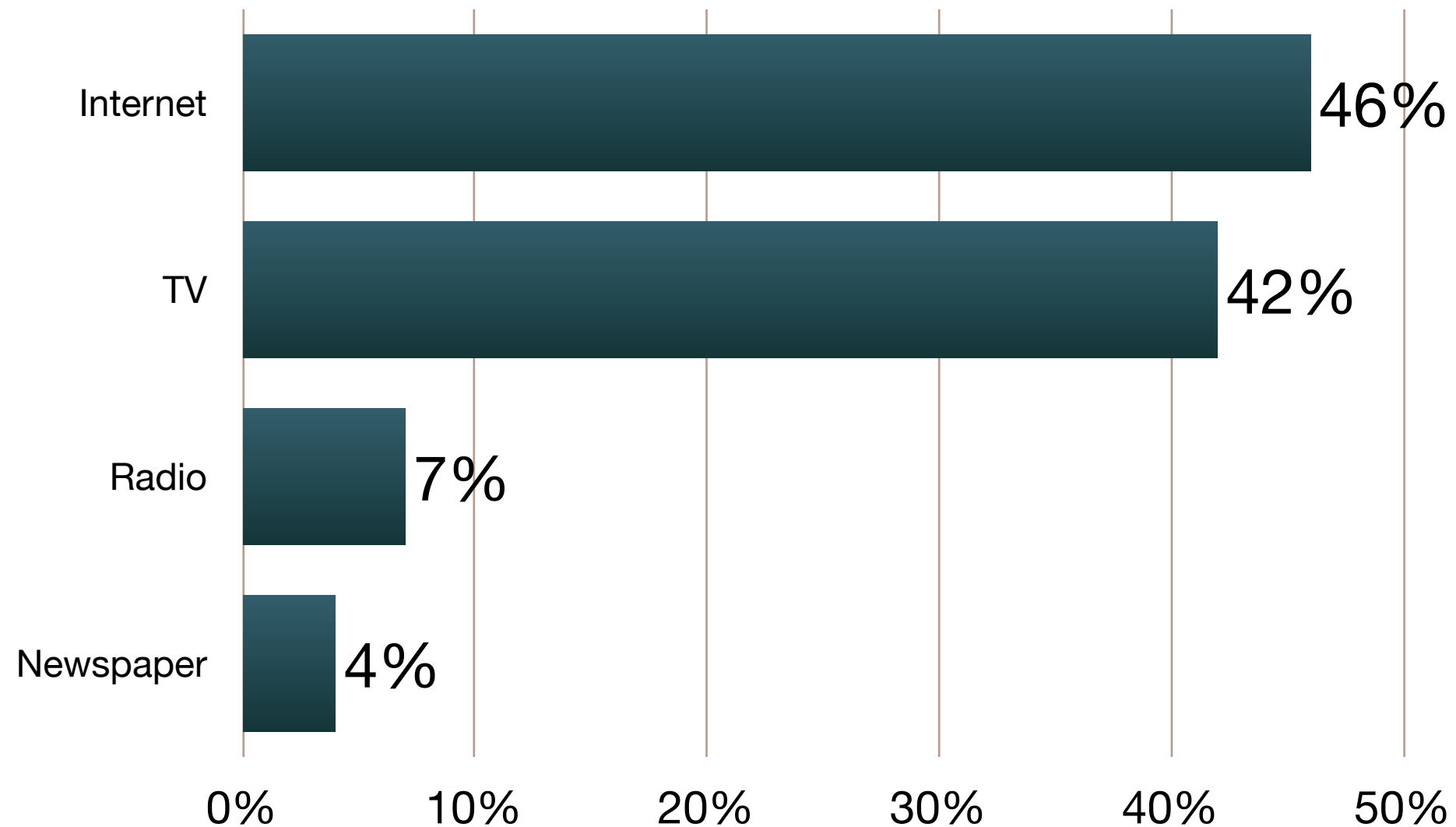
Internet More Important Than TV to Vast Majority of Regular Twitter Users

“Suppose you could never watch television again OR you could never access the Internet again. Which would you be more willing to eliminate from your life?”



TV Remains Important To Twitter Users For Breaking News Updates

“Which medium do you turn to FIRST to learn about a breaking news story?”



Most Popular TV Shows - 2009

Twitter Trends

1. American Idol
2. Glee
3. Teen Choice Awards
4. Saturday Night Live
5. Dollhouse
6. Grey's Anatomy
7. Video Music Awards
8. Battlestar Galactica
9. BET Awards
10. Lost

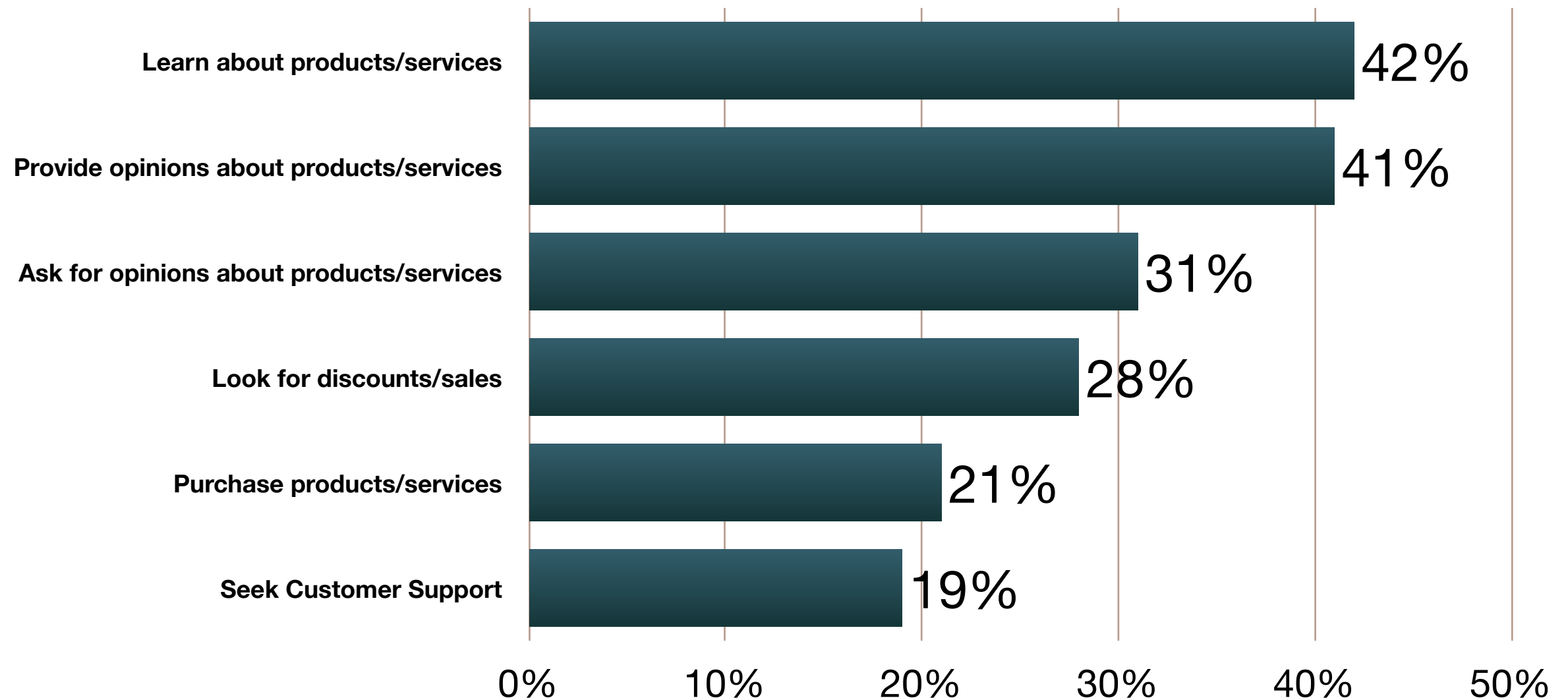
Google Zeitgeist

1. Glee
2. Bones
3. Fringe
4. NCIS
5. Castle
6. House
7. Wipeout
8. Medium
9. Leverage
10. Kings

*Sources: Twitter, Google. **RED** = live broadcasts

Twitter Users Frequently Exchange Information About Products And Services

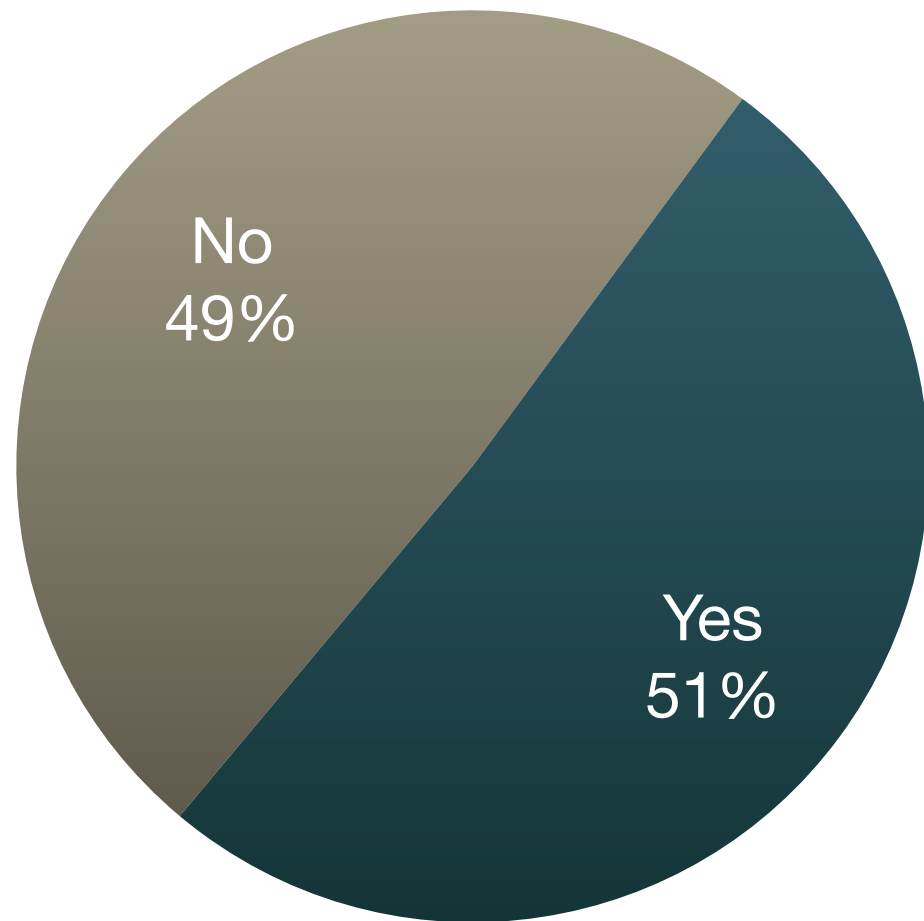
% Using Twitter to...



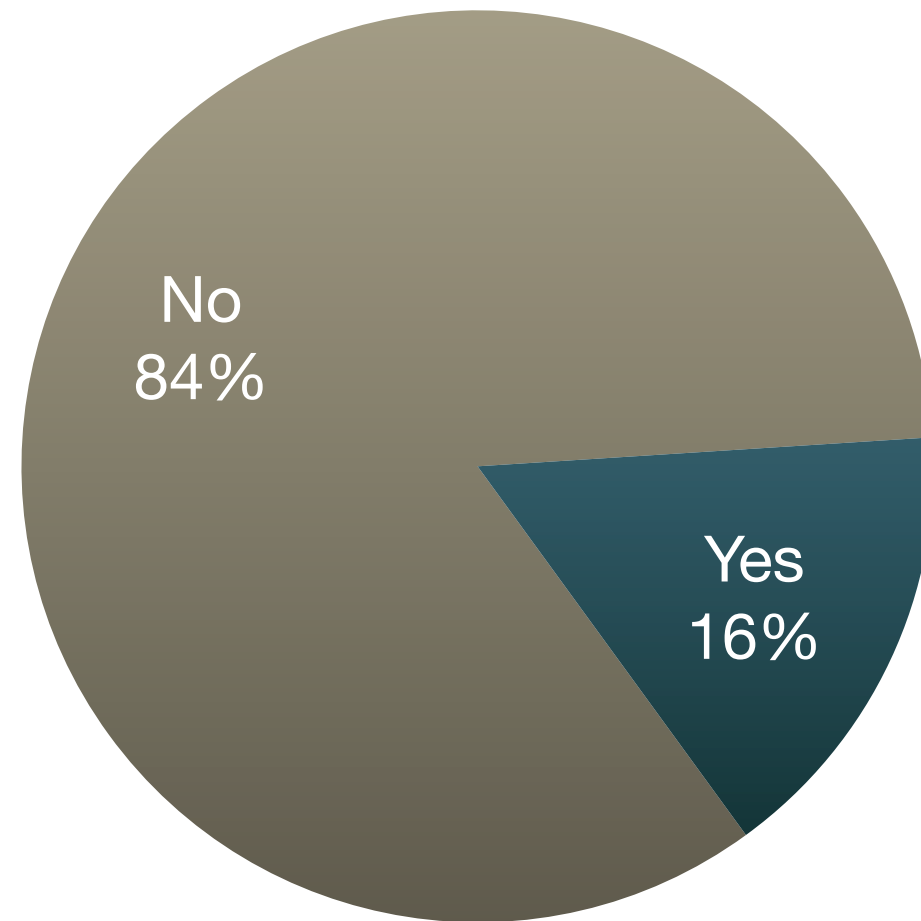
Twitter Users Far More Likely To Follow Brands/Companies Than Social Networkers In General

“Do you follow/friend any brands or companies on social networks?”

Monthly Twitter Users

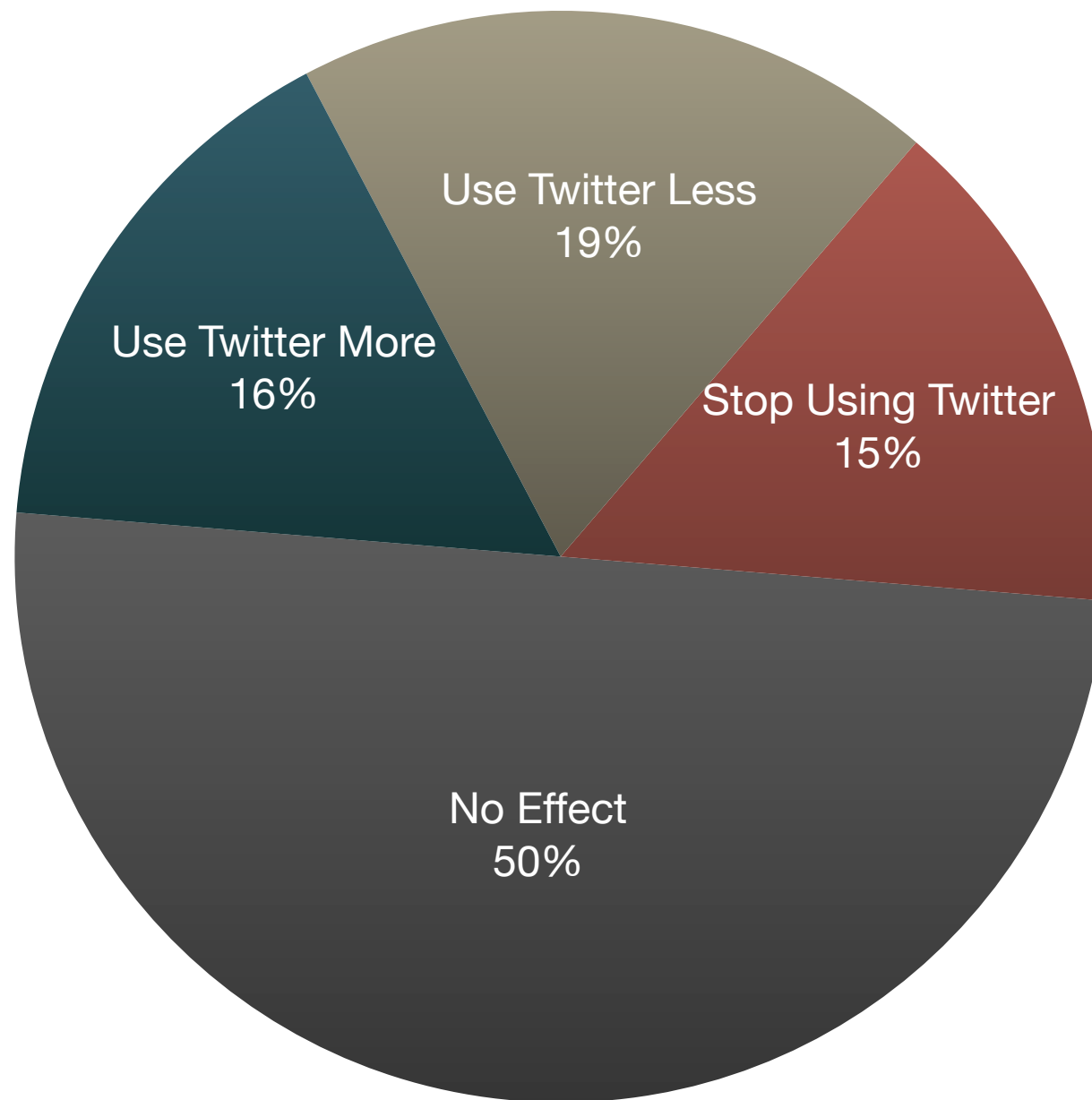


All Social Network Users



Regular Twitter Users Somewhat Sensitive To Advertising

“If Twitter were to incorporate targeted advertising into its service, how would that affect your Twitter usage?”



Base: Monthly Twitter Users



Thank You.

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