

Social Networking - UK - May 2015

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“Privacy has become one of central debates surrounding social/media networks as users increasingly question the ways in which their data is being obtained and used. There is a need for the major networks to increase their transparency regarding their use of data, and ensure that opt-out options are clear and accessible.”
 – Rebecca McGrath, Research Analyst

This report looks at the following areas:

- Networks firmly enter the world of e-commerce
- People grow more wary regarding online privacy
- The need to tackle abuse

Social and media networks continue to evolve, with many of the major players broadening the scope of their services, resulting in a blurring of the distinction between the two types of network. Video has become more central to social networks, while many networks have entered the world of direct e-commerce.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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What we think

Trend Application

Trend: Life Hacking
 Trend: Make it Mine

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Trend: Prove It

Issues and Insights

Networks firmly enter the world of e-commerce

The facts

The implications

People grow more wary regarding online privacy

The facts

The implications

The need to tackle abuse

The facts

The implications

Market Drivers

Key points

Three in four people now own a smartphone

Figure 8: Personal ownership of consumer technology products, June and November 2014

Wearable tech requires new developments

Video blurs the line between social and media networks

Social/Media network celebrities become mainstream

Data takes centre stage as EU accuses Facebook of illegally tracking visitors

Twitter announces plans to sell more tweets

Celebrity leak further highlights privacy issues

Who's Innovating?

Key points

Meerkat and Periscope fight it out over live-streaming

Facebook explores e-commerce

Twitter launches abuse filter

YouTube tailors product for kids

YouTube introduces paid-for products

Facebook challenges LinkedIn

Companies and Products

Facebook Inc.

Background

Users

Figure 9: Facebook global monthly active users, daily active users and mobile users, 2010-14

Financials

Figure 10: Key financial data for Facebook worldwide, 2011-14

Recent activity

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In July 2014 Facebook acquired the virtual reality start-up Oculus VR for \$2 billion. Regarding the purpose of the acquisition Zuckerberg said, "By feeling truly present, you can share unbounded spaces and experiences with the people in your life. Imagine sharing not just moments with your friends online, but entire experiences and adventures."

Google+

Background

Financials

Figure 11: Key financial data for Google Inc, 2011-14

Recent activity

LinkedIn

Background

Members

Figure 12: Number of members for LinkedIn Corp, 2011-14

Financials

Figure 13: Key financial data for LinkedIn Corp, 2011-14

Recent activity

Twitter

Background

Users

Figure 14: Monthly active Twitter users, 2012-14

Financials

Figure 15: Key financial data for Twitter Inc, 2012-14

Recent activity

Instagram

Background

Pinterest

Background

Recent activity

Tumblr

Background

Recent activity

YouTube

Background

Recent activity

The Consumer – Social and Media Networks Used

Key points

Over three quarters use a social network

Figure 16: Usage of social and media networks, February 2015

Younger people are active on many networks

Figure 17: Repertoire of social and media networks used, February 2015

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YouTube continues to increase UK penetration

Network preferences vary between genders

Figure 18: Usage of social and media networks, by gender, February 2015

The Consumer – Frequency of Usage

Key points

Facebook has most frequent visitors...

Figure 19: Frequency of visits to social and media networks, February 2015

...Although Facebook and Twitter users are visiting less

The Consumer – Devices

Key points

Mobile devices central for social/media networks

Figure 20: Devices used to access social and media networks, February 2015

The Consumer – Activities

Key points

Social networks mainly used to keep in touch while media networks entertain

Figure 21: Activities conducted on social and media networks, February 2015

Younger people less likely to use social networks to keep in touch

Figure 22: Activities conducted on social networks, by age, February 2015

The Consumer – Attitudes towards Advertising

Key points

Over a third of users are fine with discrete adverts

Figure 23: Attitudes towards advertising, February 2015

Few willing to pay to avoid adverts

Little comfort with targeting adverts via browsing history

The Consumer – Networks Behaviour

Key points

Over a fifth do not close accounts regardless of use

Figure 24: Social and media networks behaviour, February 2015

Younger people more likely to have experienced abuse on networks

Few have yet to use a network 'buy button'

The Consumer – Attitudes towards Social/Media Networks

Key points

Most would be put off using a network if they received abuse

Figure 25: Attitudes towards social and media networks, February 2015

Concern over work colleagues seeing social content

Storing data is a concern for many

Celebrity photo leak makes users more reserved

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