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**Social Networking Study**  
**Attitudes and Usage of Web-Based Social Networking**  
**In the Advertising Specialty Channel**

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## ASI Social Networking Study September 2009

### Background:

On June 1, 2009, an exclusive ASI survey was commissioned in order to gauge the impact and usage of social networking in our industry. Invitations went to ASI distributor, supplier and decorator members who were the primary contact for their company.

A total of 1,364 firms responded to the survey request out of 23,936 invited, resulting in a 5.7% response rate. One reminder to take the survey was sent. An incentive of a drawing for \$250 was offered, as well a copy of the report summary.

### Summary of Conclusions

- **Business communications should be focused on LinkedIn.** It has the highest proportion of business users, as 93% of distributors and 85% of suppliers with accounts use them at least partially for business. LinkedIn also has the greatest proportion of members, indicating it will be the most relevant in the near future. **Facebook should also be used for communications** because of its high penetration among ASI members (59% of distributors and 62% of suppliers).
- **There's no consensus about which social networking site will be most relevant** in the future for social networking in the ad specialty industry, but nearly 90% feel **social networking already is or will become a good way to promote** their business. This leaves the opportunity wide open for offering a social networking business solution.
- Among those expressing an opinion, **53% of distributors and 48% of suppliers feel they will be increasing the amount of time they spend with social networking** over the next 12 months, with nearly as many indicating anticipated increases more than 12 months from now. This suggests social networking is going to become an increasingly vital way for businesses to communicate in the near- and long-term.



## Summary of Social Networking Sites:

### Have an Account

	Distributors	Suppliers
	1018	223
	%	%
Facebook	58.5	61.9
LinkedIn	54.2	46.2
MySpace	16.3	23.8
YouTube	15.8	23.7
Twitter	12.4	18.0

### Awareness of Sites

	Distributors	Suppliers
	%	%
YouTube	98.7	99.1
Facebook	96.1	95.1
Twitter	92.5	90.6
MySpace	91.3	90.1
LinkedIn	77.5	72.2

### Sites with a Business Purpose

	Distributors	Suppliers
	%	%
LinkedIn	93.3	84.5
Twitter	68.6	80.0
Facebook	31.8	37.6
MySpace	26.4	17.0
YouTube	15.9	23.6

### # Months with Account

	Distributors	Suppliers
	%	%
MySpace	17.1	21.5
LinkedIn	9.3	12.8
Facebook	7.7	10.6
Twitter	3.8	5.3



## Detailed Findings:

### Facebook

*Which of the following best represents your familiarity with Facebook?*

- About six out of 10 of distributors (59%) and suppliers (62%) have a Facebook account.
- Facebook has high awareness of over 95% among all respondents.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	1018	114	223	75
You have a Facebook account	<b>58.5%</b>	66.7%	<b>61.9%</b>	73.3%
You have heard of Facebook, but do not have an account	37.5%	33.3%	33.2%	22.7%
You are not at all familiar with Facebook	3.9%	0.0%	4.9%	4.0%

*Please indicate the statement below that best reflects your usage of Facebook.  
(Base: Have Facebook account)*

- Facebook is used primarily for personal usage, as nearly two-thirds (65% of distributors and 62% of suppliers) who have an account have it for personal use.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	596	76	138	55
You have a Facebook account for personal usage	<b>65.3%</b>	72.4%	<b>61.6%</b>	65.5%
You have a Facebook account for business purposes	8.9%	2.6%	12.3%	9.1%
You have separate Facebook accounts for business and personal usage	15.3%	15.8%	18.1%	16.4%
Your Facebook account has separate lists that you actively manage to separate personal and business	7.6%	5.3%	7.2%	7.3%
Your Facebook account(s) are no longer active	3.0%	3.9%	0.7%	1.8%

*How long have you used Facebook?*

- Suppliers have had Facebook accounts longer (11 months) than distributors (8 months).

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
Average # of Months	7.68	8.58	10.6	11.86



## MySpace

*Which of the following best represents your familiarity with MySpace?*

- While three-quarters (75%) of distributors have heard of MySpace, only 16% have accounts.
- Two-thirds (66%) of suppliers have heard of MySpace and nearly one-quarter (24%) have accounts.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	1018	114	223	75
You have a MySpace account	16.3%	12.3%	23.8%	34.7%
You have heard of MySpace, but do not have an account	<b>75.0%</b>	84.2%	<b>66.4%</b>	60.0%
You are not at all familiar with MySpace	8.7%	3.5%	9.9%	5.3%

*Please indicate the statement below that best reflects your usage of MySpace. (Base: Have MySpace account)*

- Almost one-quarter (22%) of distributor MySpace accounts are not active.
- Over two-thirds (68%) of supplier MySpace accounts and over one-half (51%) of distributor accounts are for primarily personal use.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	166	14	53	26
You have a MySpace account for personal usage	<b>51.2%</b>	64.3%	<b>67.9%</b>	76.9%
You have a MySpace account for business purposes	12.0%	14.3%	5.7%	3.8%
You have separate MySpace accounts for business and personal usage	7.8%	0.0%	9.4%	7.7%
Your one MySpace account is for both personal and business	6.6%	7.1%	1.9%	0.0%
Your MySpace account(s) are no longer active	<b>22.3%</b>	14.3%	15.1%	11.5%

*How long have you used MySpace?*

- Suppliers have used MySpace longer, almost 2 years (22 months) on average.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
Average # of Months	17.12	20.21	21.52	22.09



## Twitter

Which of the following best represents your familiarity with Twitter?

- Similar to MySpace, many have heard of Twitter but do not have an account. Three-quarters (75%) of distributors and 70% of suppliers are familiar with Twitter, but do not have accounts.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	1018	114	223	75
You follow people on Twitter	4.8%	8.8%	2.2%	4.0%
You use Twitter to send messages	1.3%	0.0%	5.4%	5.3%
You use Twitter to send messages and follow people	11.1%	11.4%	12.6%	13.3%
You have heard of Twitter, but do not use it	<b>75.3%</b>	77.2%	<b>70.4%</b>	72.0%
You are not at all familiar with Twitter	7.5%	2.6%	9.4%	5.3%

Please indicate the statement below that best reflects your usage of Twitter.  
(Base: Have Twitter account)

- Over two-thirds (69%) of distributors who have Twitter accounts use it at least somewhat for business, as do well over three-quarters (80%) of suppliers.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	175	23	45	17
You have a Twitter account for personal usage	29.7%	39.1%	20.0%	17.6%
You have a Twitter account for business purposes	<b>35.4%</b>	30.4%	<b>44.4%</b>	35.3%
You have separate Twitter accounts for business and personal usage	<b>16.6%</b>	17.4%	<b>28.9%</b>	41.2%
Your one Twitter account is for both personal and business	<b>16.6%</b>	13.0%	<b>6.7%</b>	5.9%
Your Twitter account(s) are no longer active	1.7%	0.0%	0.0%	0.0%

How long have you used Twitter?

- Twitter usage is newer than other forms of social media, as distributors have used it for under four months and suppliers just over five months.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
Average # of Months	3.81	4.07	5.29	4.26



## LinkedIn

Which of the following best represents your familiarity with LinkedIn?

- While awareness of LinkedIn is relatively high at about three-quarters (78%) of distributor respondents, it's significantly less than other major social media sites.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	1018	114	223	75
You follow people on LinkedIn, but generally don't use to send messages	35.6%	31.6%	31.4%	34.7%
You use LinkedIn to send messages	18.6%	24.6%	14.8%	17.3%
You have heard of LinkedIn, but do not use it	23.4%	27.2%	26.0%	25.3%
You are not at all familiar with LinkedIn	22.5%	16.7%	27.8%	22.7%

Please indicate the statement below that best reflects your usage of LinkedIn.  
(Base: Have LinkedIn account)

- LinkedIn is used for business purposes, as almost all distributors (93%) and 85% of suppliers use it at least partially for business.
- Very few LinkedIn accounts are inactive.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	551	64	103	39
You have a LinkedIn account for personal usage	5.8%	10.9%	13.6%	12.8%
You have a LinkedIn account for business purposes	<b>72.4%</b>	64.1%	<b>61.2%</b>	56.4%
You have separate LinkedIn accounts for business and personal usage	<b>3.3%</b>	3.1%	<b>7.8%</b>	12.8%
Your one LinkedIn account is for both personal and business	<b>17.6%</b>	21.9%	<b>15.5%</b>	17.9%
Your LinkedIn account(s) are no longer active	0.9%	0.0%	1.9%	0.0%

How long have you used LinkedIn?

- Distributors have used LinkedIn an average of nine months, while suppliers average 13 months.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
Average # of Months	9.34	10.19	12.79	14.24



## YouTube

*Which of the following best represents your use of YouTube?*

- Usage of YouTube is mostly personal by about one-half (48%) of distributors and suppliers (51%).

	<b>Total Distributors</b>	<b>Distributors &gt;\$2.5 M</b>	<b>Total Suppliers</b>	<b>Suppliers &gt;\$2.5 M</b>
	1015	114	220	75
You use YouTube for mostly business useage	3.7%	2.6%	5.5%	4.0%
You use YouTube for a combination of business and personal useage	12.1%	14.0%	18.2%	20.0%
You use YouTube for mostly personal useage	<b>48.2%</b>	53.5%	<b>51.4%</b>	57.3%
You have heard of YouTube, but you have not used it	34.7%	27.2%	24.1%	18.7%
You are not at all familiar with YouTube	1.3%	2.6%	0.9%	0.0%

*Which of the following best represents your familiarity with DistributorTalk?*

- Only 10% of distributors use DistributorTalk, about the same as “Have accounts but no longer use.”

	<b>Total Distributors</b>	<b>Distributors &gt;\$2.5 M</b>	<b>Total Suppliers</b>	<b>Suppliers &gt;\$2.5 M</b>
You use DistributorTalk to post/read messages	<b>9.7%</b>	6.3%	3.1%	0.0%
You have a DistributorTalk account, but no longer use it	9.0%	6.3%	12.5%	0.0%
You have heard of DistributorTalk, but you have not used it	22.6%	25.0%	25.0%	33.3%
You are not at all familiar with DistributorTalk	58.7%	62.5%	59.4%	66.7%



Please indicate your extent of agreement with each of the following statements:

- Nearly one-half (47%) of distributors and suppliers (43%) aren't really sure how to use social networking, but still dabble with it.
- About 40% of all respondents feel social networking is time well spent.
- Less than one-third (32%) of distributors and suppliers (31%) actively use social networking to promote their business.

**Agree with Statement (Agree Completely/Somewhat Agree)**

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	1013	114	220	74
You dabble at social networking, but aren't really sure how to use it for your business	<b>46.8%</b>	44.7%	<b>42.7%</b>	39.2%
You feel social networking is time well spent	<b>39.3%</b>	40.4%	<b>40.9%</b>	37.8%
You feel social networking sites are useful for job searching or recruiting	37.2%	43.4%	37.9%	43.2%
You actively use social networking as a way to promote your business	<b>31.7%</b>	33.3%	<b>30.5%</b>	32.4%



ASInetwork.com

*Do you use asinetwork.com for social networking?*

- About 7% of all respondents indicated they use asinetwork.com for social networking. However, there could be some confusion about asinetwork.com and asicentral.com.

	<b>Total Distributors</b>	<b>Distributors &gt;\$2.5 M</b>	<b>Total Suppliers</b>	<b>Suppliers &gt;\$2.5 M</b>
	1018	114	223	75
Yes	<b>7.4%</b>	10.5%	6.7%	12.0%
No	90.7%	87.7%	91.9%	86.7%
Don't know	2.0%	1.8%	1.3%	1.3%

*Which of the following best represents your use of the ASI social network (asinetwork.com)?*

*(Base: Use asinetwork.com)*

- Education/Advice is the dominant reason for using asinetwork.com, cited by two-thirds (68%) of those who use the site.

	<b>Total Distributors</b>
	74
Market your business	6.8%
Education/Advice	<b>67.6%</b>
Establish relationships	17.6%
Other, please specify	8.1%



Please indicate which of the statements below best expresses your opinion about social networking and the advertising specialty industry. Social networking ...

- About six out of 10 distributors and suppliers (59% and 61%, respectively) feel social networking will become a good way to promote, but it isn't there yet.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	1009	112	220	75
Is already a good way to promote your business.	28.2%	32.1%	23.6%	28.0%
Will become a good way to promote your business.	<b>59.4%</b>	54.5%	<b>61.4%</b>	57.3%
Will never have a true business use.	12.4%	13.4%	15.0%	14.7%

Which of the following social networking sites do you feel will be most relevant for promoting your business in the next one to two years?

- There's no consensus about which social networking site will be most relevant in the future, though LinkedIn was cited by 25% of distributors. Suppliers are even less certain.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	1000	112	218	73
LinkedIn	<b>24.9%</b>	25.0%	14.2%	13.7%
My personal blog or Web site	18.9%	17.9%	14.7%	9.6%
Something yet to be established	17.0%	16.1%	16.1%	19.2%
Facebook	16.7%	17.9%	13.3%	15.1%
Twitter	5.6%	6.3%	9.2%	9.6%
No social network that isn't specialized by industry or by function	5.0%	3.6%	9.2%	8.2%
ASI social network	4.4%	5.4%	16.5%	16.4%
MySpace	0.4%	0.0%	0.5%	1.4%
Other, please specify	7.1%	8.0%	6.4%	6.8%



Please list any other social networking sites that you currently use.

While there were 151 responses, nearly one-third of them (48) were for Plaxo. That's a very high amount for a write-in response.

- **Plaxo** (www.plaxo.com) is an online social networking site boasting “We securely host address books for more than 40 million people (and growing rapidly).” It seems to be very close in scope to Facebook and MySpace, emphasizing both business and personal applications, except that it also functions as an aggregator for other sites. *Wired.com* states, “Dump in all the notifications, feeds and updates from your various networks, and the services will bring it all into one master stream, relieving you of the responsibility of visiting a dozen or more sites. ... Controls let you dial back the flow by sorting and filtering the flow, pruning it down to only what matters most.”

Which of the following activities have you conducted on social networking sites?

- Viewing videos or slideshows is the most common activity on social networking sites among the activities examined other than messaging.
  - Suppliers were significantly more likely to post videos than distributors, as over one-fourth (28%) of suppliers have posted for 18% of distributors.
- Q&A applications are also used by nearly one-third, further supporting the usage of social networking as an education source.

	Total Distributors	Distributors >\$2.5 M	Total Suppliers	Suppliers >\$2.5 M
	670	88	152	58
Viewed videos or slideshow applications	<b>61.5%</b>	65.9%	<b>60.5%</b>	63.8%
Q&A applications	<b>30.3%</b>	25.0%	<b>25.7%</b>	27.6%
Polling applications	19.9%	27.3%	20.4%	22.4%
Posted videos or slideshow applications	<b>18.4%</b>	30.7%	<b>27.6%</b>	32.8%
Expert applications on LinkedIn	13.6%	12.5%	14.5%	20.7%
Other activities	15.2%	13.6%	11.8%	13.8%



*How has the amount of time you or your company spends on social networking for business changed?*

- The amount of time spent on social networking has risen a great deal over the last 12 months, especially for distributors, as 40% have increased the amount of time they spend. Nearly one-third (32%) of suppliers have also increased their time spent social networking, with very few decreasing the amount of time spent.

**The Last 12 Months**

	<b>Total Distributors</b>	<b>Distributors &gt;\$2.5 M</b>	<b>Total Suppliers</b>	<b>Suppliers &gt;\$2.5 M</b>
	1001	112	220	75
Increase	<b>40.2%</b>	42.0%	<b>31.8%</b>	42.7%
Decrease	2.7%	1.8%	2.7%	0.0%
Remain the same	40.9%	41.1%	46.4%	42.7%
Don't know	16.3%	15.2%	19.1%	14.7%

- The short-term outlook for time spent with social networking is also very positive, with over one-half (53%) of distributors and just under one-half (48%) of suppliers planning to increase time spent with on social networking.
- Despite many anticipating additional time spent, about one-quarter of all respondents still aren't sure. This may be because of uncertainty about how to effectively use social networking

**The Next 12 Months**

	<b>Total Distributors</b>	<b>Distributors &gt;\$2.5 M</b>	<b>Total Suppliers</b>	<b>Suppliers &gt;\$2.5 M</b>
	995	111	216	73
Increase	<b>53.1%</b>	55.0%	<b>48.1%</b>	54.8%
Decrease	1.6%	0.9%	0.9%	0.0%
Remain the same	20.2%	23.4%	28.2%	23.3%
Don't know	25.1%	20.7%	22.7%	21.9%

- Long-term anticipated usage is also high, with about one-half (49%) of distributors and larger suppliers planning on increasing the time spent on social networking and almost no one anticipating a decline.

**More Than 12 Months from Now**

	<b>Total Distributors</b>	<b>Distributors &gt;\$2.5 M</b>	<b>Total Suppliers</b>	<b>Suppliers &gt;\$2.5 M</b>
	986	110	212	73
Increase	<b>48.7%</b>	50.0%	44.3%	<b>49.3%</b>
Decrease	1.7%	0.9%	0.9%	0.0%
Remain the same	15.5%	16.4%	22.6%	19.2%
Don't know	34.1%	32.7%	32.1%	31.5%

